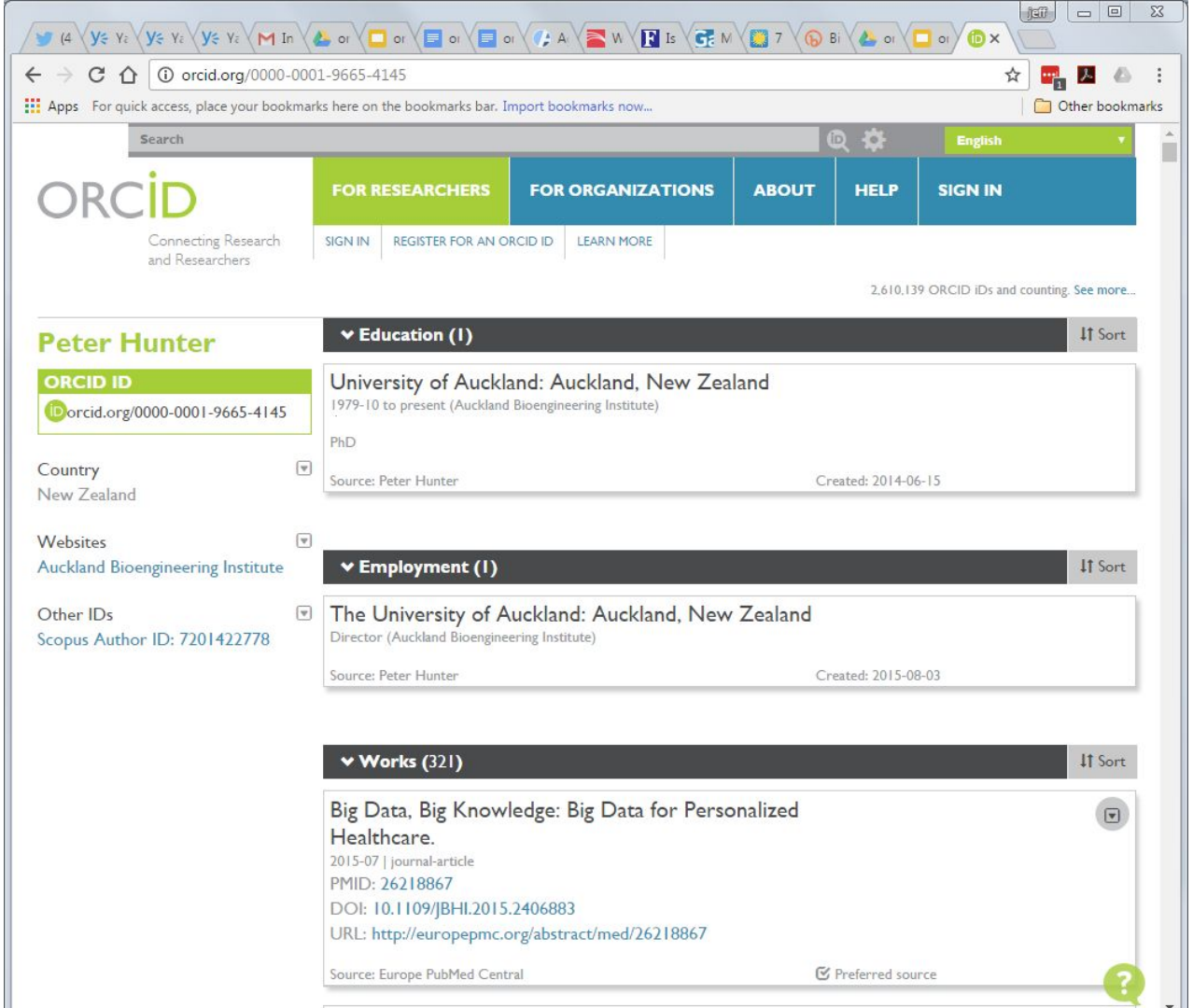
New Zealand ORCID Working Group

High-Level Technology Requirements Sub-Group
ORCID Hub at the NZ ORCID Consortium Launch
13 October 2016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Websites
Auckland Bioengineering Institute
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Scopus Author ID: 7201422778
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Sort
University of Auckland: Auckland, New Zealand
1979-10 to present (Auckland Bioengineering Institute)
PhD
Source: Peter Hunter
Created: 2014-06-15
Employment (1)
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The University of Auckland: Auckland, New Zealand
Director (Auckland Bioengineering Institute)
Source: Peter Hunter
Created: 2015-08-03
Works (321)
Sort
Big Data, Big Knowledge: Big Data for Personalized Healthcare.
2015-07 | journal-article
PMID: 26218867
DOI: 10.1109/JBHI.2015.2406883
URL: http://europepmc.org/abstract/med/26218867
Source: Europe PubMed Central
Preferred source

ORCID = Open Researcher and Contributor ID

ORCID provides researchers with digital identifiers that are:

- Persistent
- Unique
- Resolvable
- Portable
- Personal
- Machine-readable

Joint Statement of Principle: Adoption and use of ORCID identifiers in New Zealand

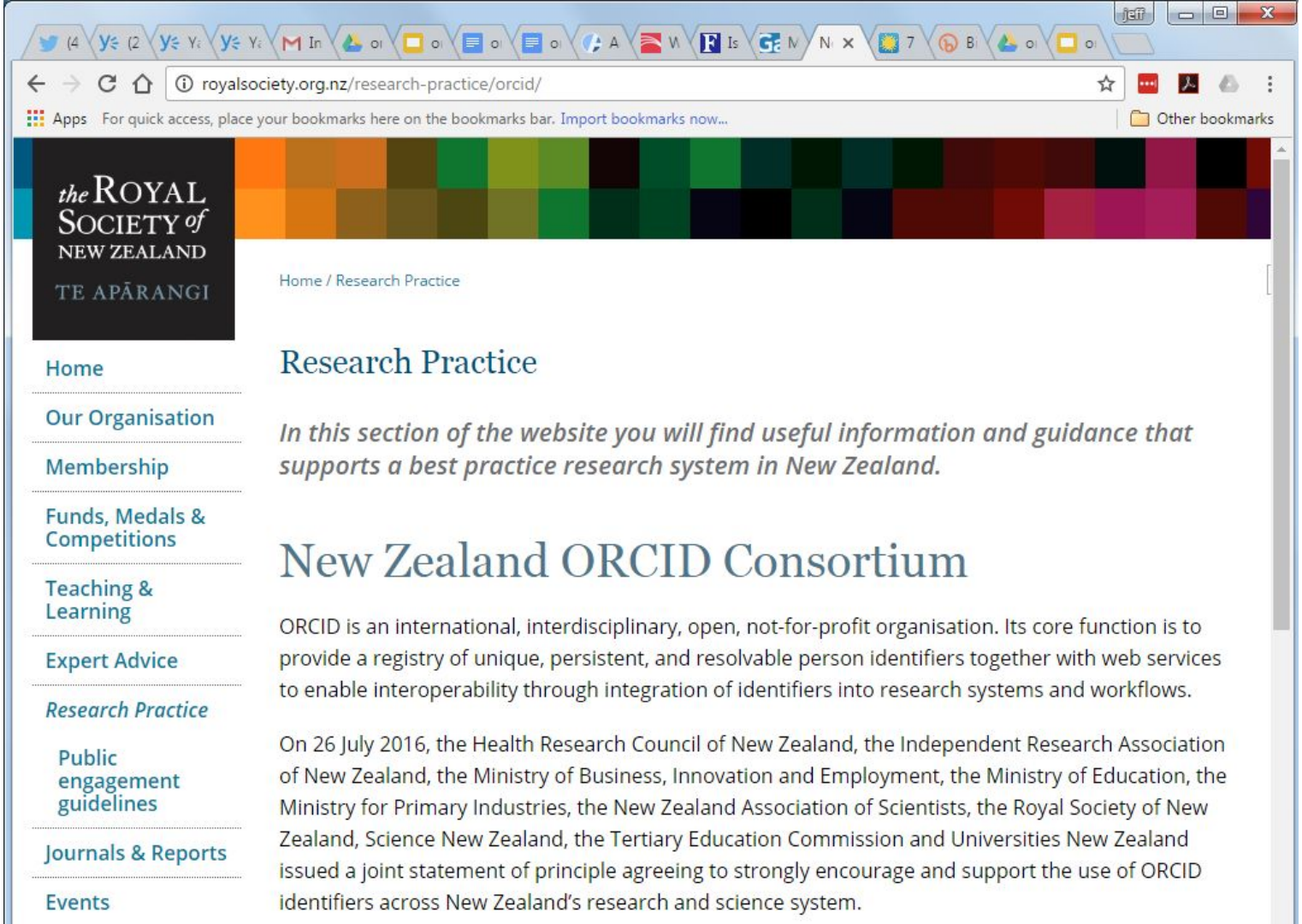
http://www.mbie.govt.nz/info-services/science-innovation/data-and-information-improvement/orcid-joint-statement-of-principle-optimised.pdf/view

ORCID Purpose and Benefits

- Researcher disambiguation
- Accurate attribution of research outputs
- Improved data quality
- Reduced workload for researchers
- Increased visibility of the research system

New Zealand ORCID Consortium

- MBIE-led initiative
- The Royal Society of New Zealand is the lead agency
  - http://royalsociety.org.nz/orcid/
- Technology Partner contractual negotiations underway
- Launch is 13 October 2016, today!
- Dozens of research organisations have joined already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Research Practice
In this section of the website you will find useful information and guidance that supports a best practice research system in New Zealand.
New Zealand ORCID Consortium
ORCID is an international, interdisciplinary, open, not-for-profit organisation. Its core function is to provide a registry of unique, persistent, and resolvable person identifiers together with web services to enable interoperability through integration of identifiers into research systems and workflows.
On 26 July 2016, the Health Research Council of New Zealand, the Independent Research Association of New Zealand, the Ministry of Business, Innovation and Employment, the Ministry of Education, the Ministry for Primary Industries, the New Zealand Association of Scientists, the Royal Society of New Zealand, Science New Zealand, the Tertiary Education Commission and Universities New Zealand issued a joint statement of principle agreeing to strongly encourage and support the use of ORCID identifiers across New Zealand's research and science system.

Purpose of the Technology Sub-Group

- The base requirements for ORCID integration
- Systems into which ORCID could be integrated
- What ORCID means for smaller research organisations
- The cost of the main uses of ORCID

Sub-Group Members

Name	Role	Organisation	Position
Clinton Watson	Sponsor	MBIE	Principal Policy Advisor
jeff kennedy	Chair	The University of Auckland	Enterprise Architecture Manager
Andrew Watkins	Member	NIWA	General Manager for Information Technology
Lee Dowsett	Member	MBIE	Enterprise Architect
Matt Plummer	Member	Victoria University of Wellington	Customer Relationship Coordinator
Michele Napier	Member	Plant & Food	Knowledge Navigator Team Leader
Sat Mandri	Member	REANNZ	Tuakiri Service Manager
Vladimir Mencl	Advisor	REANNZ	Senior Solution Engineer

Base-Level Requirements

- To participate in ORCID as a national resource, research organisations need to assert authoritatively that a researcher's ORCID record is affiliated with them.
- Achieving this base-level integration is beneficial, and:
  - helps create a trusted network across New Zealand's research community
  - smooths the process when researchers move from one institution to another
  - assists funders to be certain they are using the correct ORCID iD when posting funding data and when using ORCID records for reporting
  - creates a more complete, usable record of productivity in New Zealand's research system

Research Organisations: no two are alike

Research organisations vary widely in size and in technology capability:

- number of affiliated researchers
- number of research outputs
- administrative applications
- technology capability

Primacy of Scalability

There need to be very low barriers for research organisations to achieve at least base-level participation with the New Zealand ORCID Consortium — particularly:

- Potential barriers to participation include:
  - Prohibitive cost of the service
  - Inability to use the service because of lack of technical capability
  - Labour-intensiveness
  - Poor user experience
- Services must be useful, relevant, and effective at large scale to provide value to larger organisations wishing to establish deep integration with ORCID

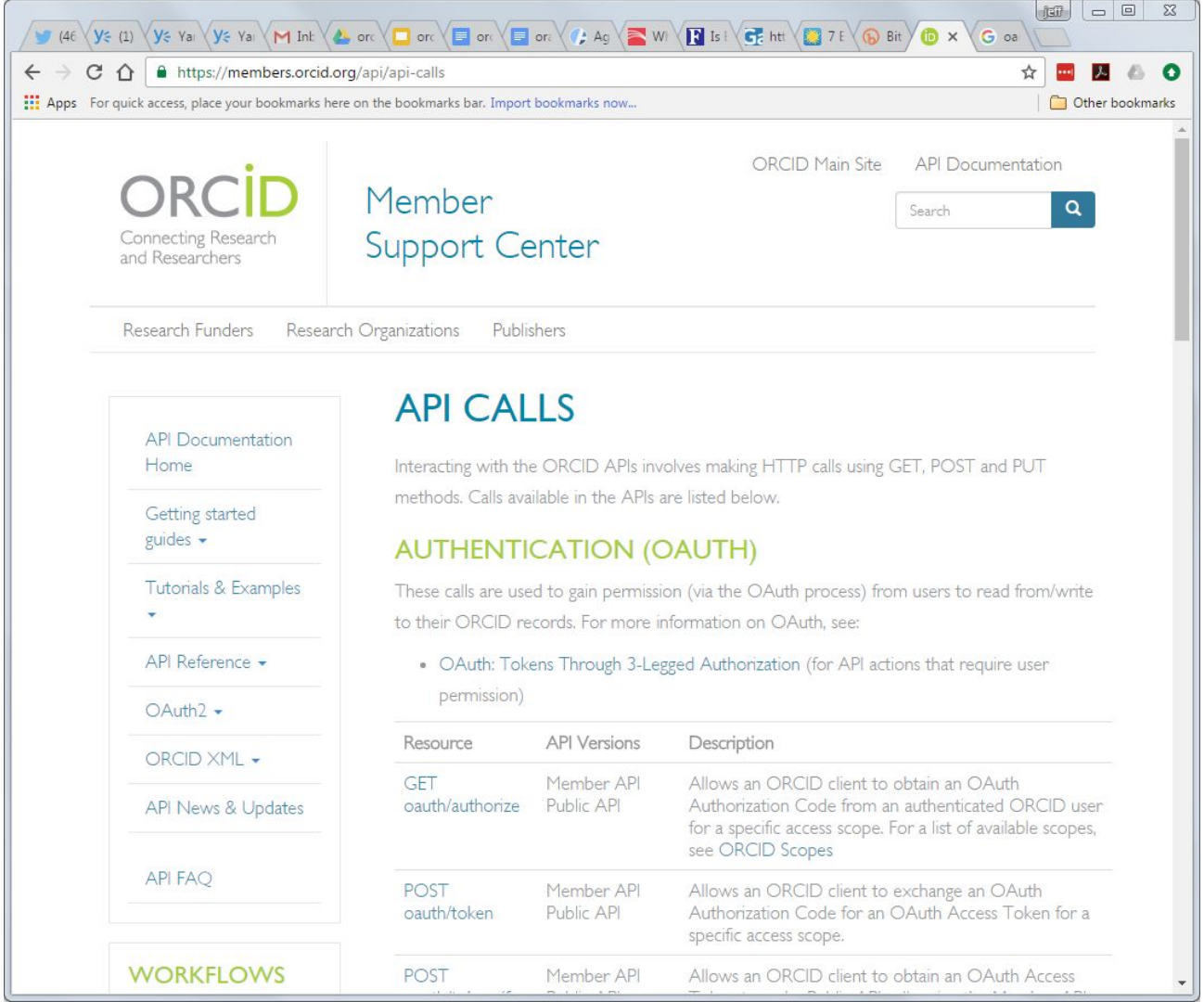
ORCID Integrations

ORCID provides a comprehensive set of beautiful RESTful API services that enable:

- authentication with OAuth 2.0
- reading from ORCID profiles*
- writing to ORCID profiles*

...and see details at https://members.orcid.org/api/api-calls for documentation, tutorials, code examples, and more.

* subject to individual-researcher permissions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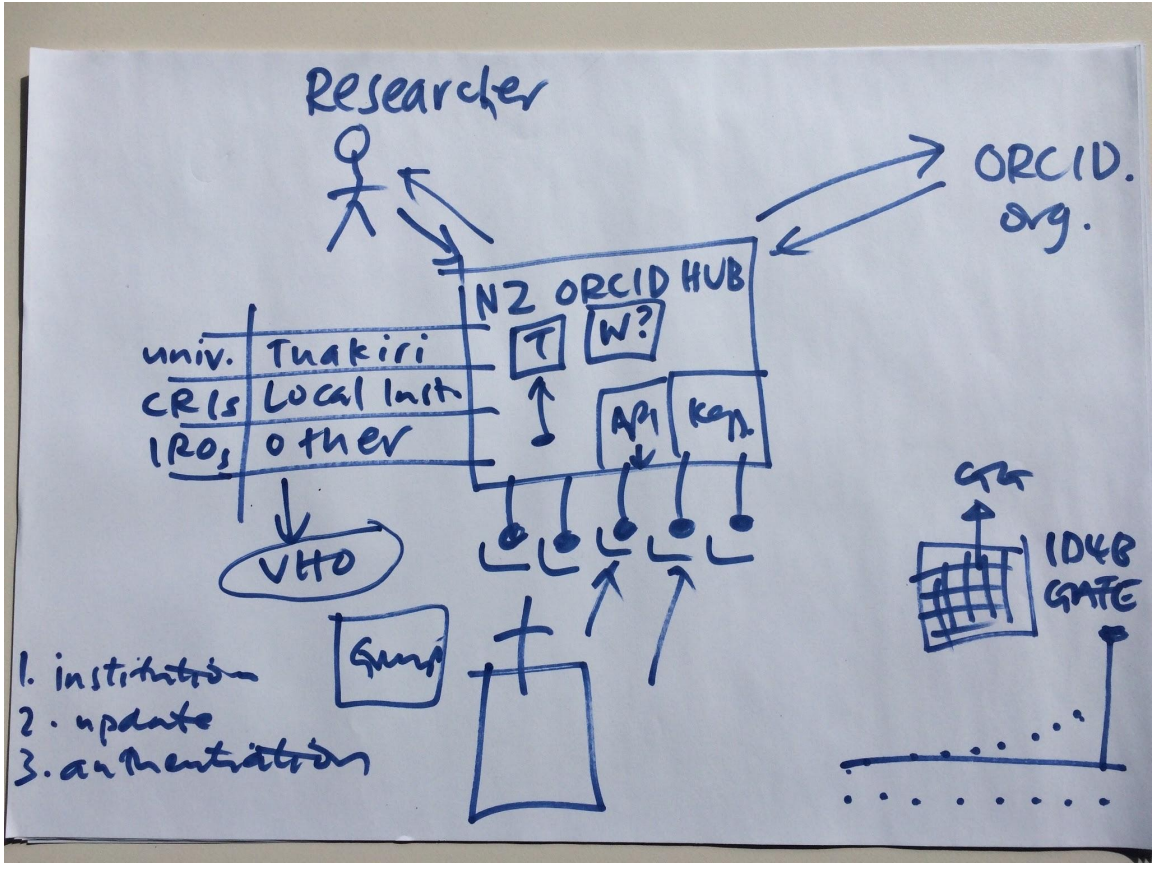
API Reference
OAuth2
ORCID XML
API News & Updates
API FAQ
WORKFLOWS
API CALLS
Interacting with the ORCID APIs involves making HTTP calls using GET, POST and PUT methods. Calls available in the APIs are listed below.
AUTHENTICATION (OAUTH)
These calls are used to gain permission (via the OAuth process) from users to read from/write to their ORCID records. For more information on OAuth, see:
OAuth: Tokens Through 3-Legged Authorization (for API actions that require user permission)
Resource
API Versions
Description
GET oauth/authorize
Member API Public API
Allows an ORCID client to obtain an OAuth Authorization Code from an authenticated ORCID user for a specific access scope. For a list of available scopes, see ORCID Scopes
POST oauth/token
Member API Public API
Allows an ORCID client to exchange an OAuth Authorization Code for an OAuth Access Token for a specific access scope.
POST
Member API
Allows an ORCID client to obtain an OAuth Access

New Zealand ORCID Hub

A national ORCID Hub enables all research organisations, large and small, to integrate with ORCID and gain access programmatically to ORCID data and functionality. This facility consists of:

- a web application that mediates between researchers, research organisations, and ORCID, facilitates the creation of authoritative affiliations, and manages the process of obtaining permissions from individual researchers and storing access tokens for later use
- a small collection of well-designed services that enable research organisations to create their own integrations directly with ORCID, if they wish to do so.

New Zealand ORCID Hub



ORCID Hub Partnerships

An open-source project executed with direct support from the ORCID Foundation, that has to date enjoyed and benefitted from a rich collaboration between the following organisations:

- ORCID Foundation
- MBIE
- The Royal Society of New Zealand
- NIWA
- Victoria University of Wellington
- Plant+Food
- The University of Auckland
- REANNZ

New Zealand ORCID Hub

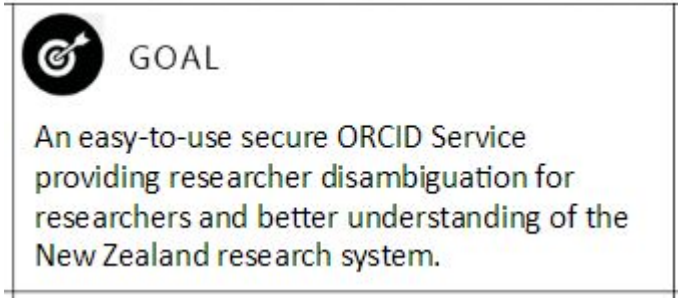
The functionality of the New Zealand ORCID Hub includes:

- Onboarding Research Organisations
- Obtaining Researcher Permissions
- Updating Researcher Profiles
- Managing Access Tokens

ORCID Design Artefacts

The design collaboration has produced several design artefacts, including:

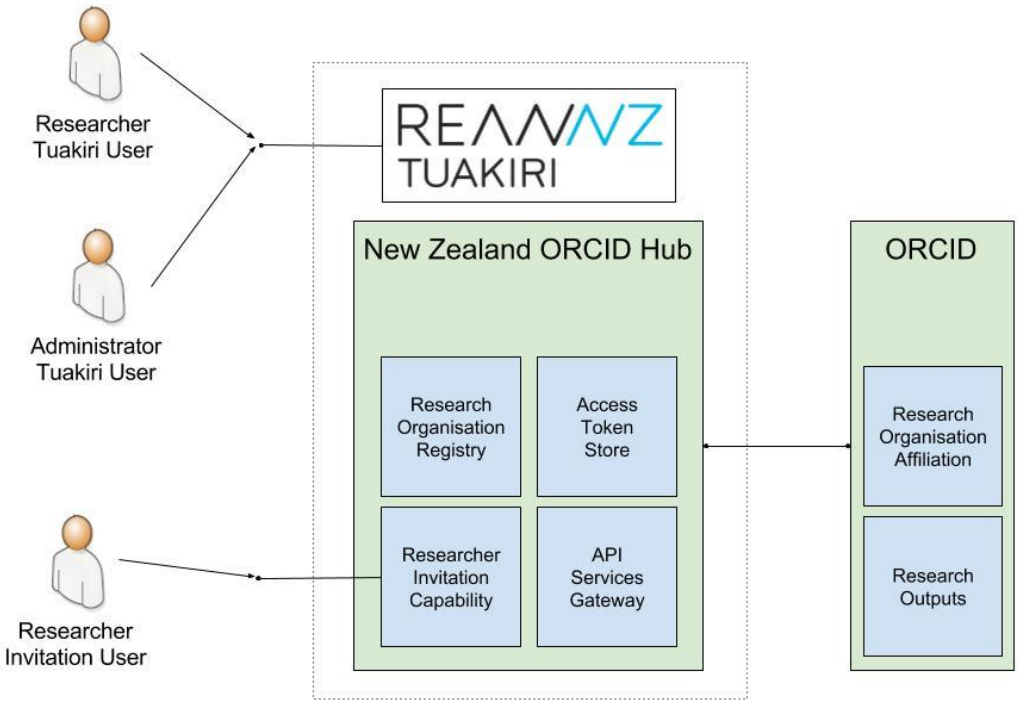
- Product Canvas
- Product Assessment
- Design Principles
- Screen and Flow Mock-Ups
- Information Model
- Function Points
- Bill of Materials



ORCID Design Principles

- Useful and Usable
- Scalability
- Globally Reusable
- Appropriate Abstraction
- The ORCID Hub is a Transactional Engine
- Contemporary and Consumable DevOps
- Lightweight, Stateless Approach
- Extendability
- Singularity of Purpose
- Security Primacy
- Audited

New Zealand ORCID Hub



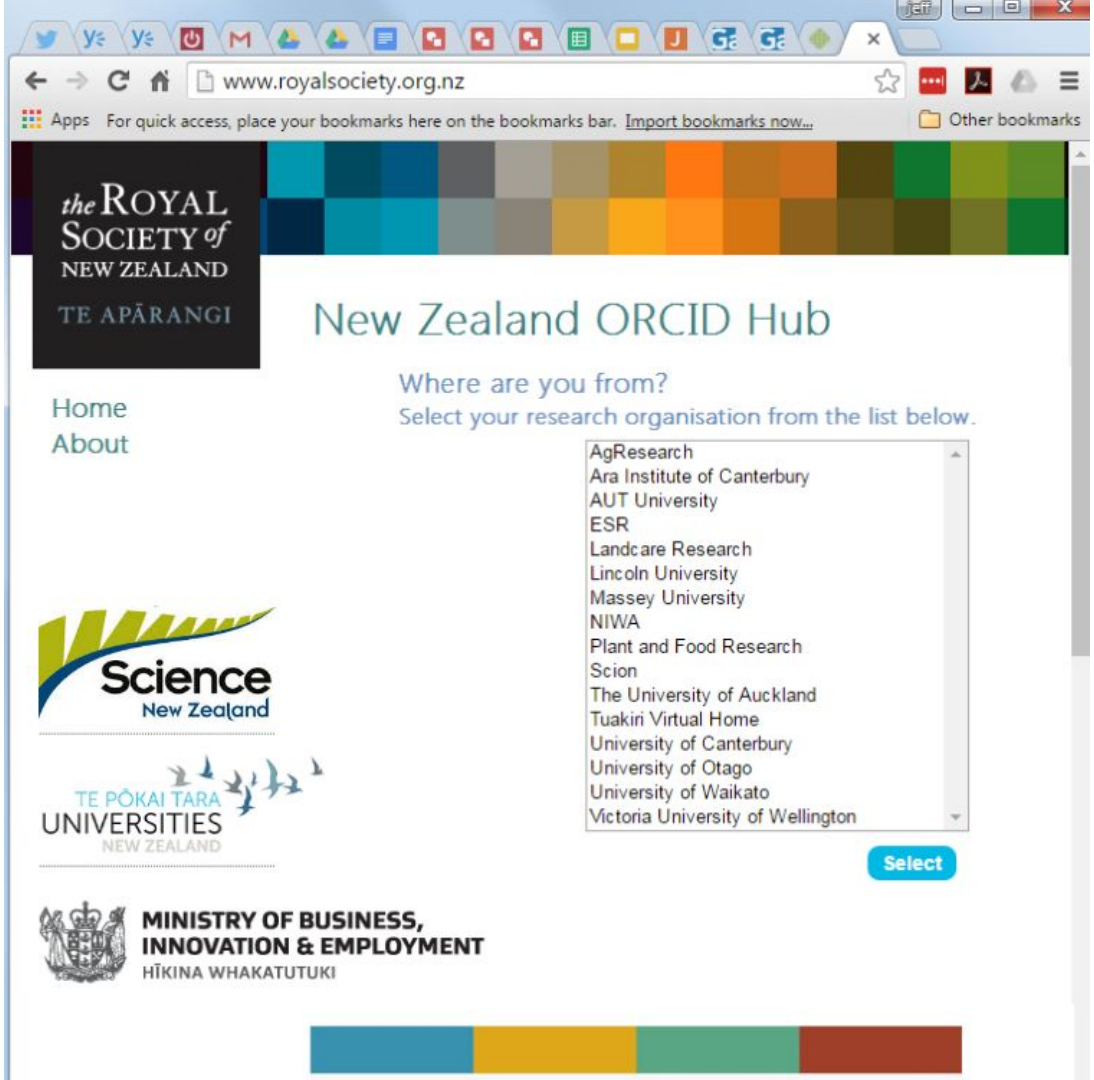
Mockups and Flows in the ORCID Hub

- The screen mock-ups are provided purely for illustrative benefit
- Three flows are modelled loosely:
  - Authentication / Login Flow
  - Researcher Flow
  - Administrator Flow

Authentication / Login Flow

Flexible Login Options

- Tuakiri New Zealand Access Federation
  - all universities
  - all Crown Research Institutes
  - some institutes of technology and polytechnics
- One-Time-Only Access
  - The *Dowsett Pattern*
- Others, such as:
  - ORCID, immediately
  - Home Organisation Logins, such as ADFS
  - RealMe, maybe later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Massey University
NIWA
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Scion
The University of Auckland
Tuakiri Virtual Home
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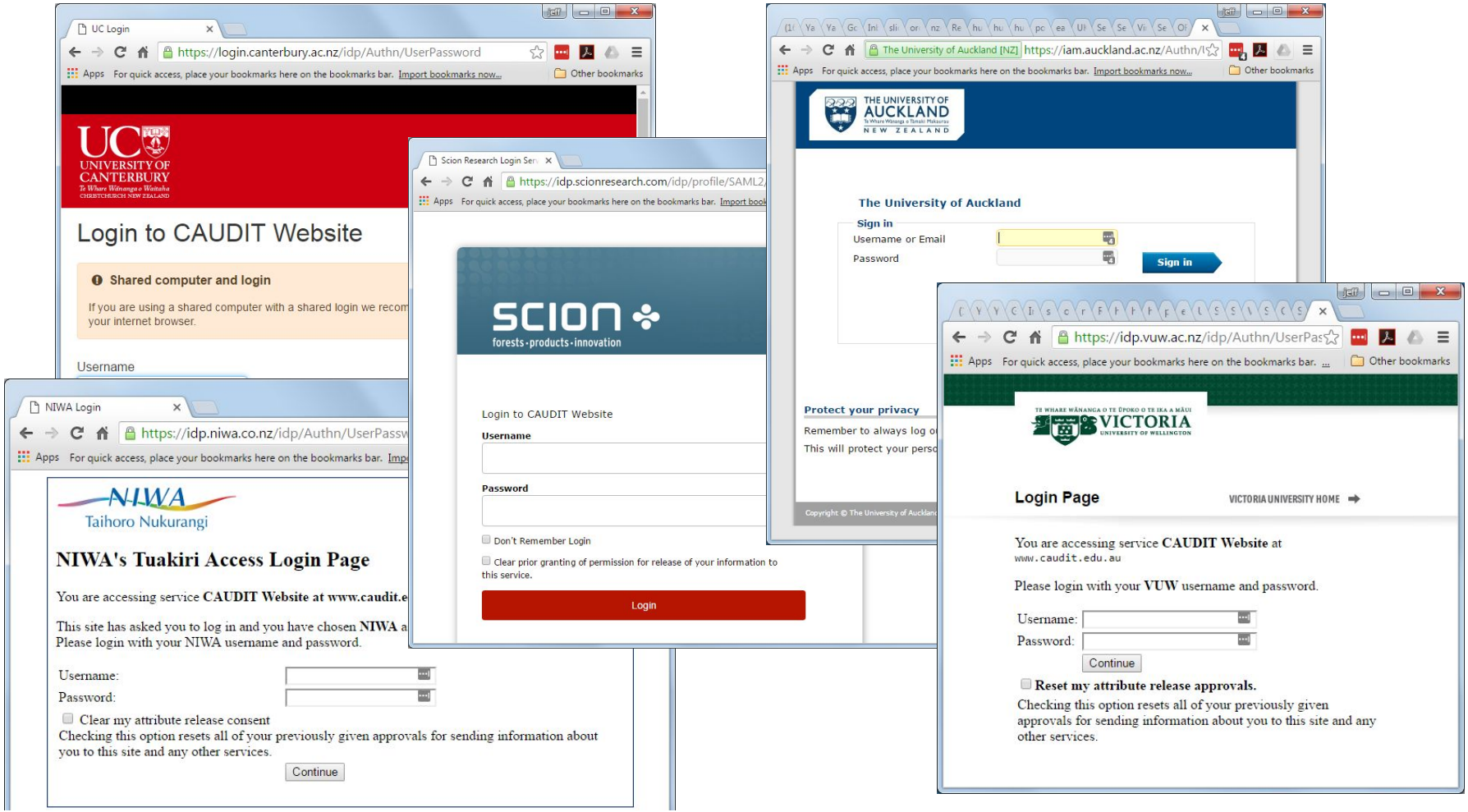
UC Login
https://login.canterbury.ac.nz/idp/Authn/UserPassword
UNIVERSITY OF CANTERBURY
Login to CAUDIT Website
Shared computer and login
Username
Scion Research Login Ser
https://idp.scionresearch.com/idp/profile/SAML2/
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Login to CAUDIT Website
Username
Password
Don't Remember Login
Clear prior granting of permission for release of your information to this service.
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Login Page
VICTORIA UNIVERSITY HOME
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Please login with your VUW username and password.
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Checking this option resets all of your previously given approvals for sending information about you to this site and any other services.
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New Zealand ORCID Hub

The Malaghan Institute invites you to obtain an ORCID identifier and then associate it with The Malaghan Institute.

Completing this quick and simple task will enable your research to be reliably identified as your own, and will streamline your future applications for research funding.

Please follow https://goo.gl/onUgcN or paste the link https://newzealandorcidhub/researcher/SDHJW4R76IWEUGKYWEGYUSDGF767WEQW into your web browser.

Please contact malaghan-support@nzoh.org.nz if you have any questions about this process.

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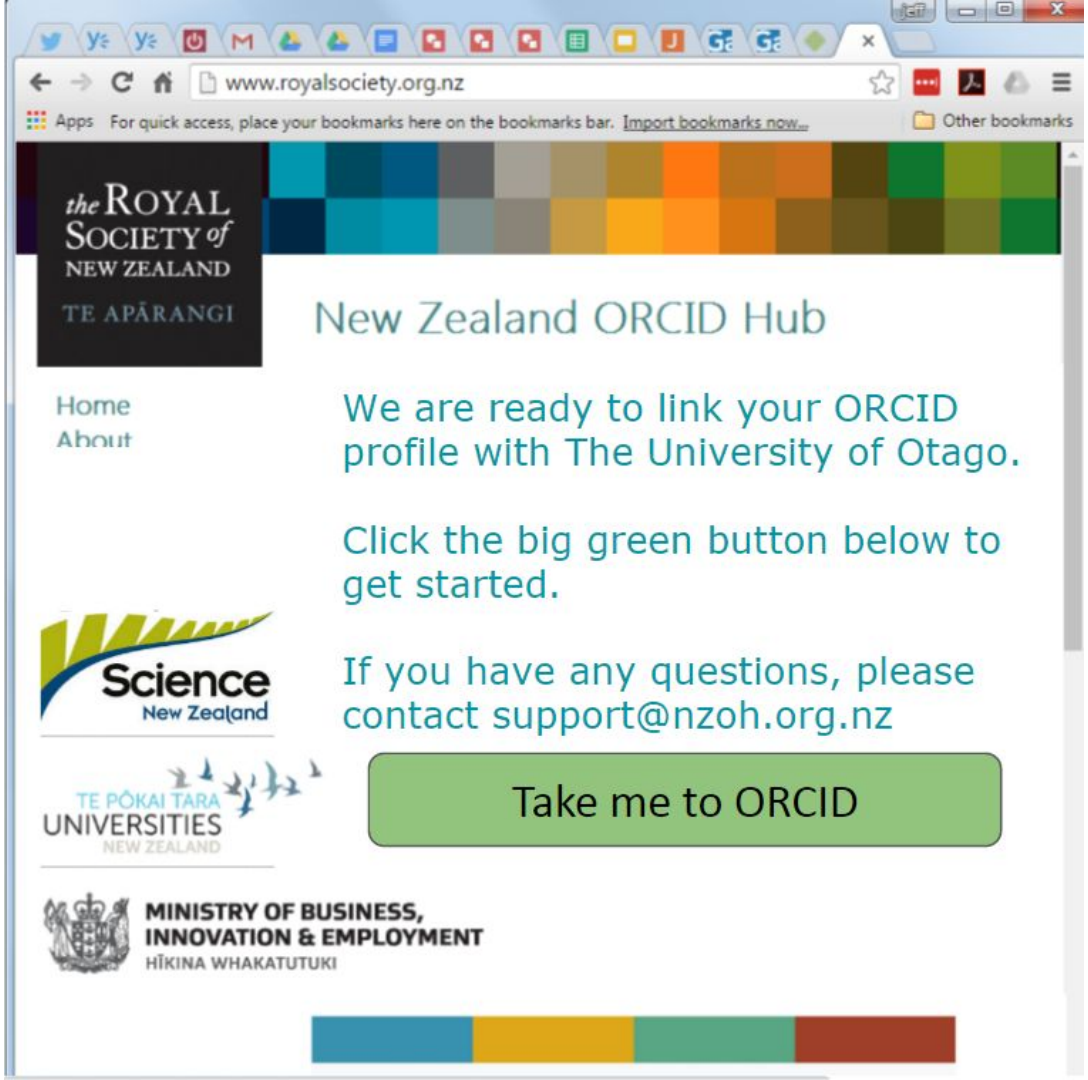
Researcher Flow

Researcher Flow

- After login, this flow illustrates the steps a researcher will take to associate their ORCID profile with a research organisation
- ORCID permissions are granted individually by researchers to their affiliated research organisations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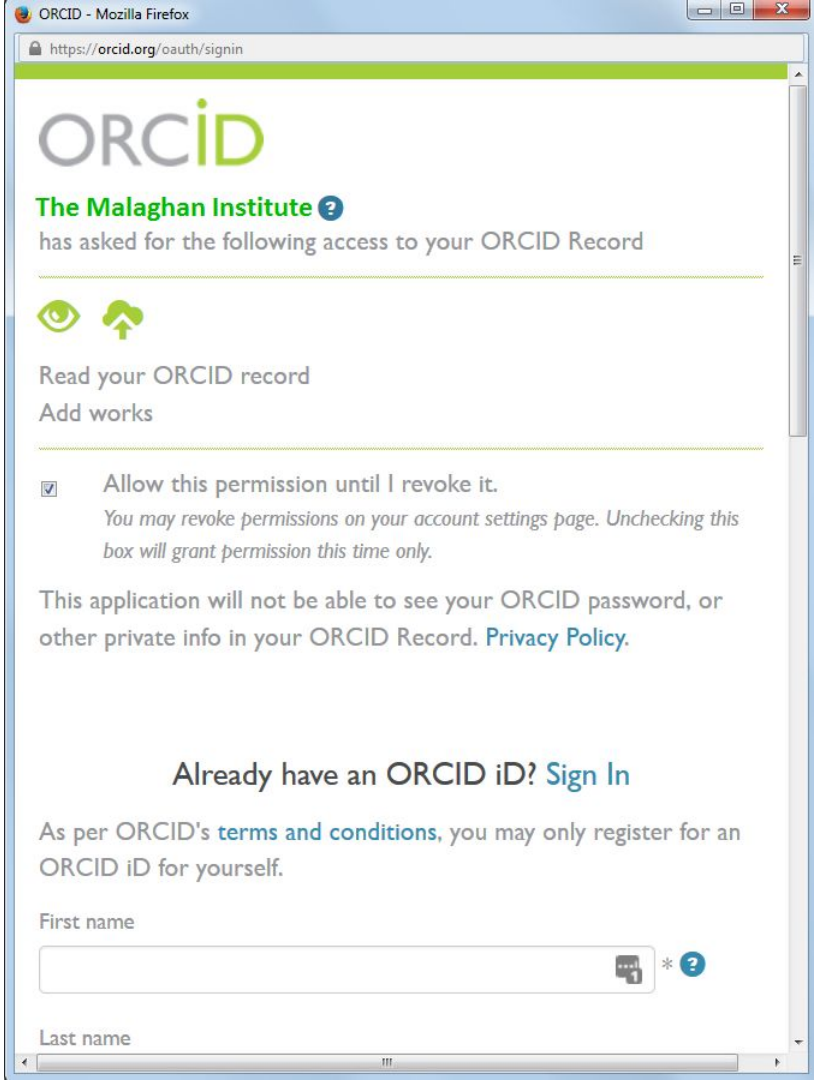
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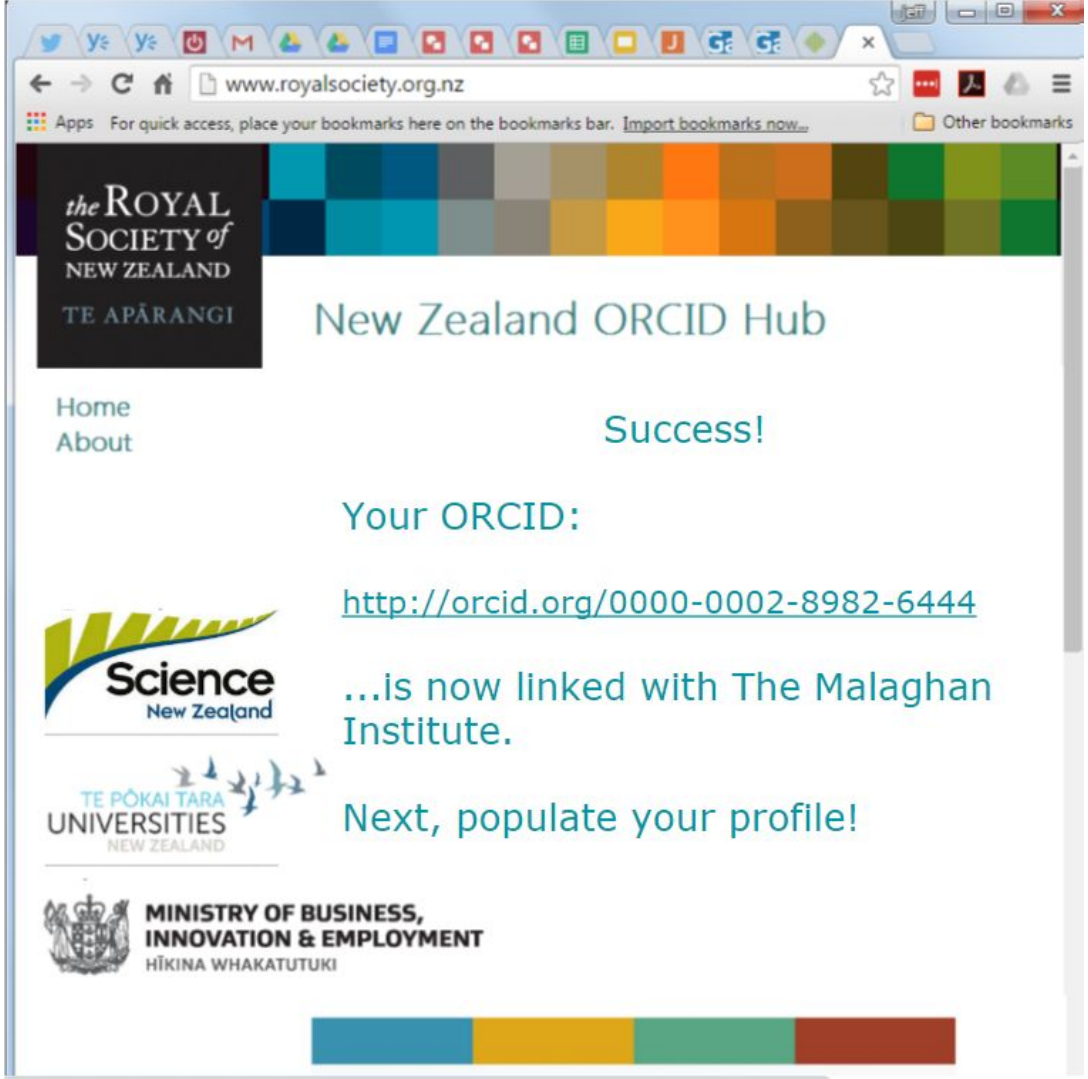
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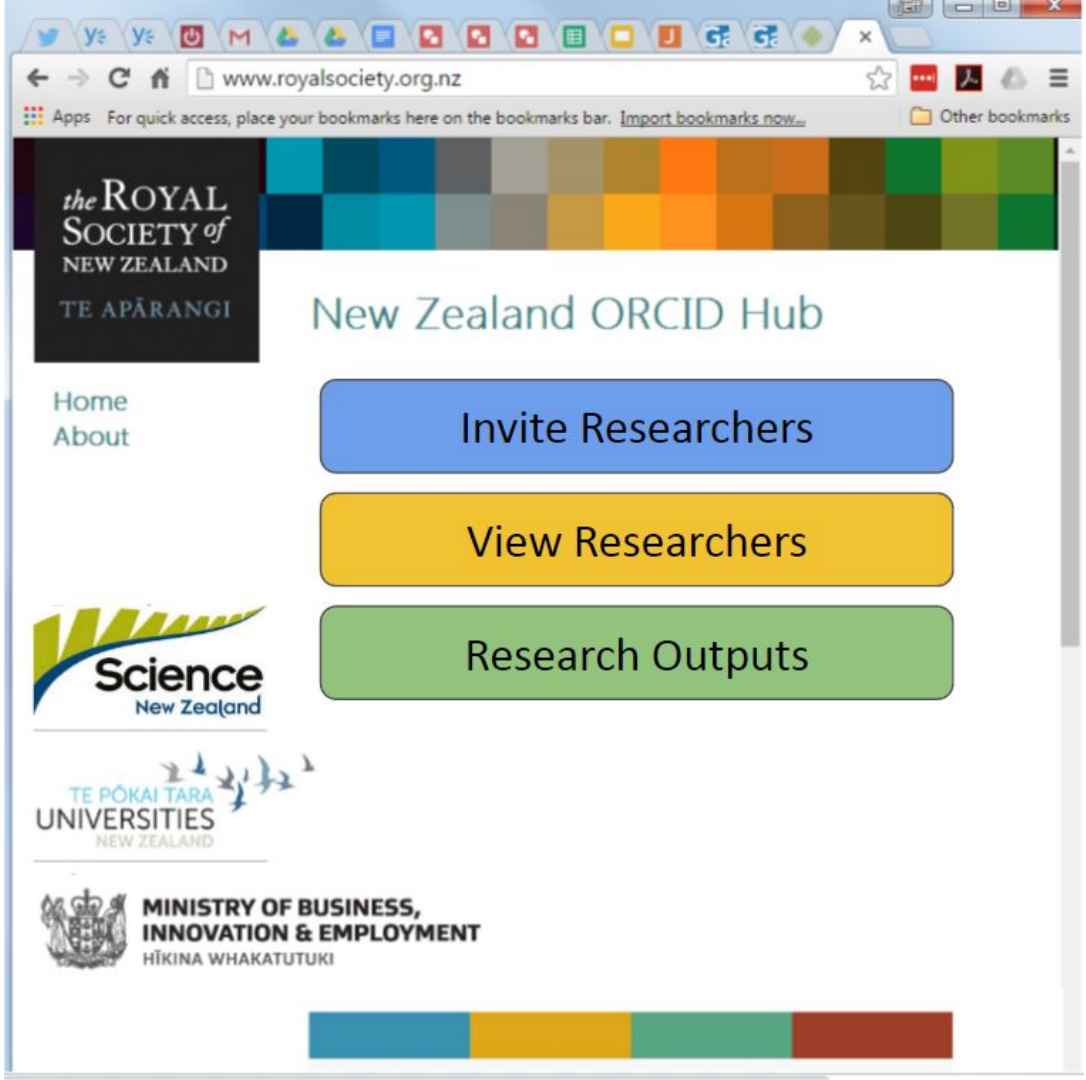
Administrator Flows

Administrator Flow

- After login, this flow illustrates the steps an administrator could take to invite researchers to affiliate their ORCID profiles with a research organisation
- This administrative workflow is provided for small research organisations that don’t have a login service (i.e., it’s not intended for use by large research organisations)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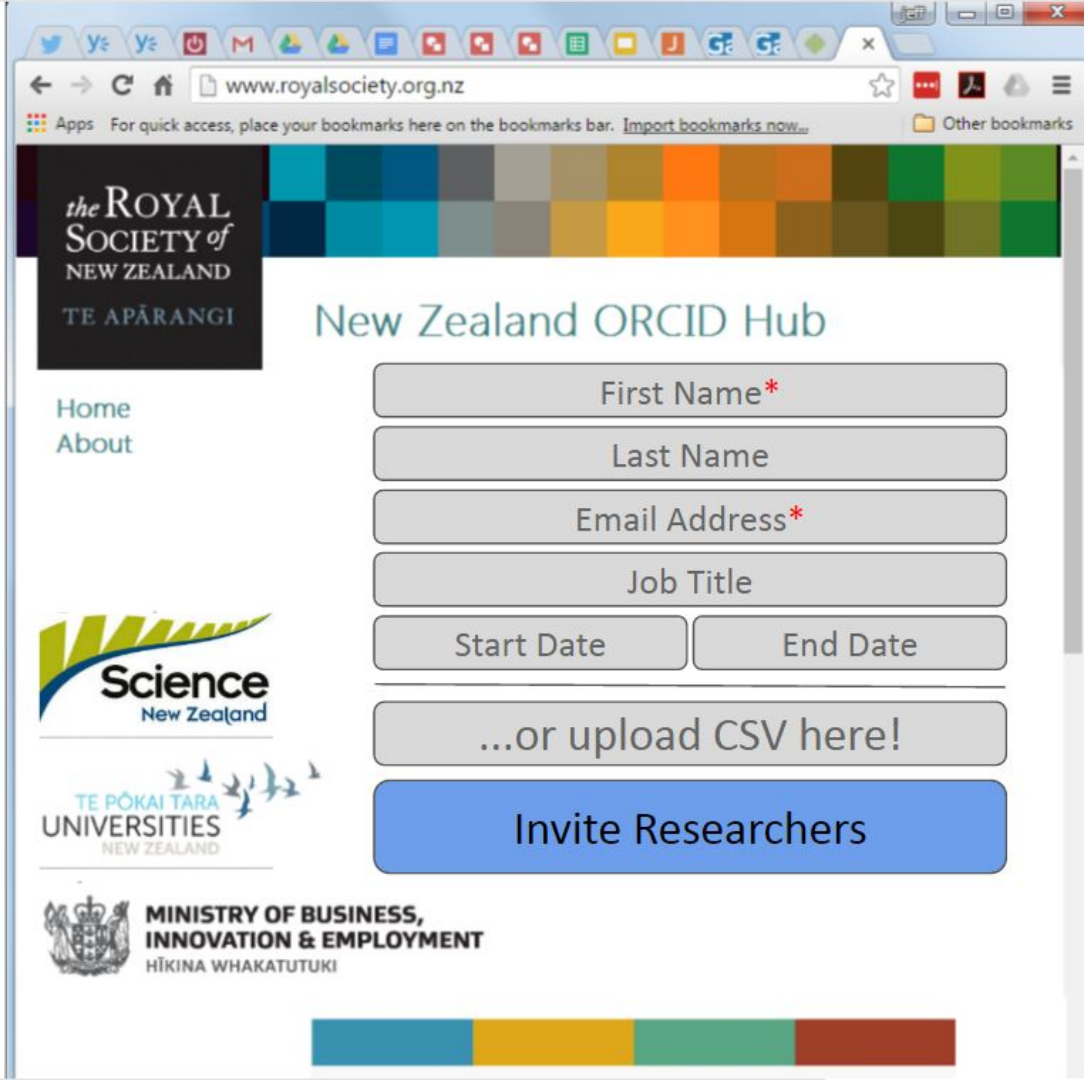
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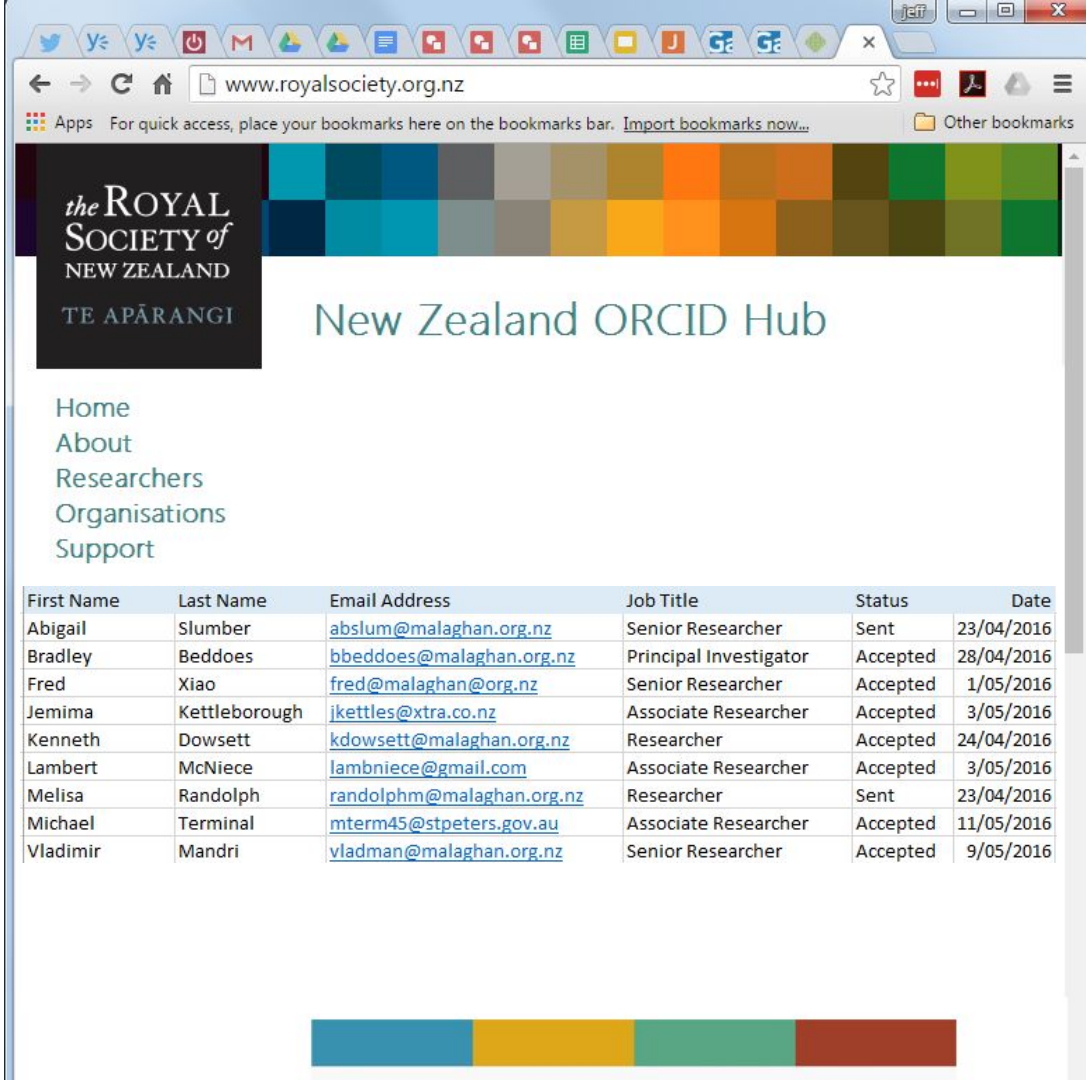

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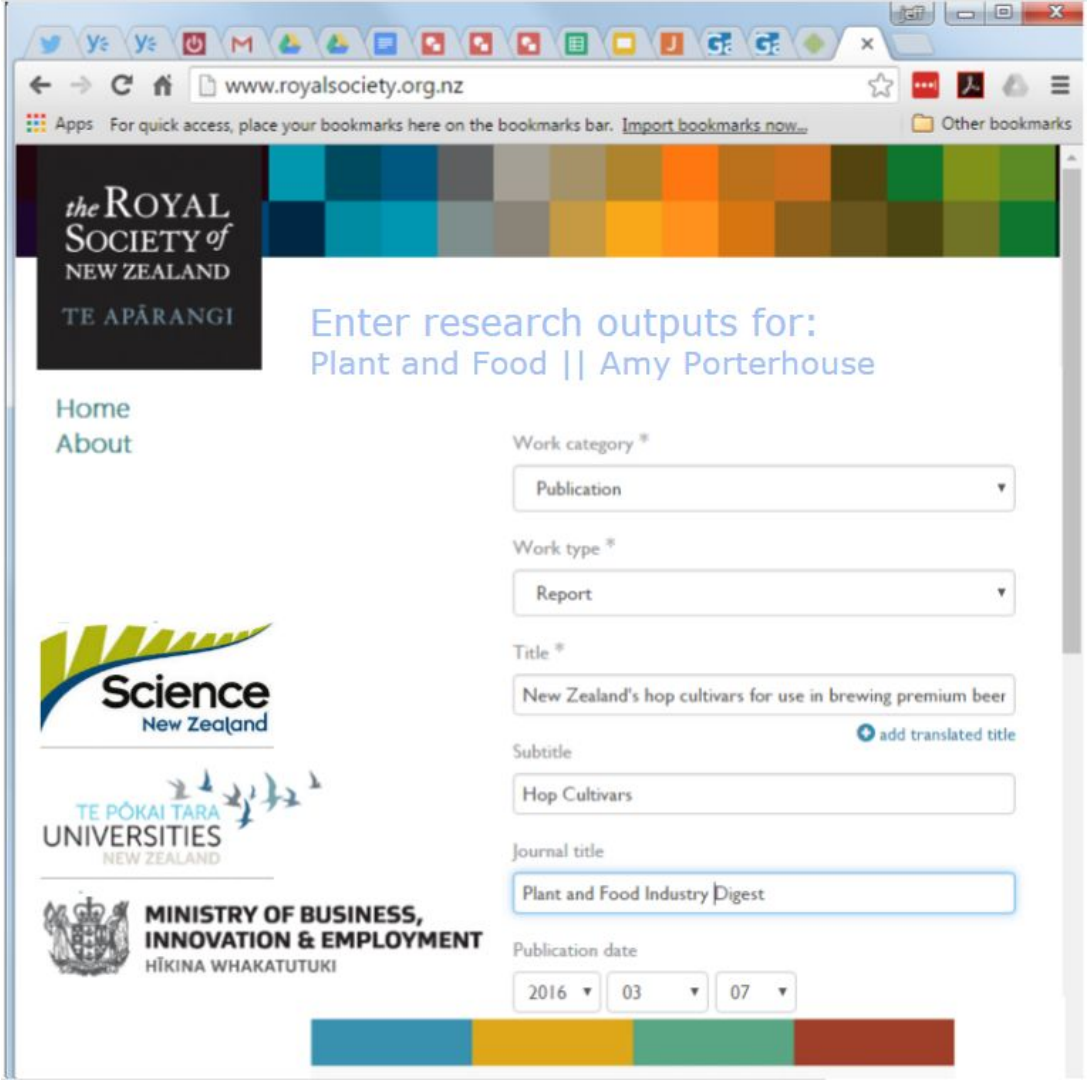
Bradley	Beddoes	bbeddoes@malaghan.org.nz	Principal Investigator	Accepted	28/04/2016
Fred	Xiao	fred@malaghan@org.nz	Senior Researcher	Accepted	1/05/2016
Jemima	Kettleborough	jkettles@xtra.co.nz	Associate Researcher	Accepted	3/05/2016
Kenneth	Dowsett	kdowsett@malaghan.org.nz	Researcher	Accepted	24/04/2016
Lambert	McNiece	lambniece@gmail.com	Associate Researcher	Accepted	3/05/2016
Melisa	Randolph	randolphm@malaghan.org.nz	Researcher	Sent	23/04/2016
Michael	Terminal	mterm45@stpeters.gov.au	Associate Researcher	Accepted	11/05/2016
Vladimir	Mandri	vladman@malaghan.org.nz	Senior Researcher	Accepted	9/05/2016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Next Steps

- The Royal Society of New Zealand is continuing to develop the product roadmap for the ORCID Hub
- The New Zealand ORCID Consortium has been launched today, on 13 October 2016
- Meanwhile, starting the ORCID conversation with your researchers is a good thing to do!

Questions and Discussion

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