Onboarding your organisation to the production NZ ORCID Hub

As your organisation’s ORCID consortium technical contact, you are responsible for onboarding your organisation to the NZ ORCID Hub.

Note that, to onboard to the production Hub, you must have been through the test Hub environment and demonstrated that:

a. your organisation is onboarded successfully
b. you have connected at least one ORCID sandbox iD to your institution.

Onboarding to the production Hub requires an extra step, as ORCID sends the credentials in a more secure form than for testing. You must provide a cellphone or alternate email address for ORCID to send you a PIN to unlock your credentials.

Follow the steps below:

1. Send us a request for an invitation to the production Hub (orcid@royalsociety.org.nz).
   We will send an email with a link to click asking you to confirm that you are the nominated technical contact for your organisation: Screenshot 1 below:

   ![Screenshot 1](image)

   Welcome to the NZ ORCID Hub
   Welcome!
   Royal Society To-Apirangi is just one step from being onboarded onto the NZ ORCID Hub.
   Please either click on the link below to confirm your role as the organisation’s Technical Contact,
   https://orcidhub.org/confirm/organisation
   OR
   if that doesn’t work, navigate to the following link and copy/paste your affiliation token when asked.
   Link: https://orcidhub.org/organisation/affiliation_token
   If you received this email in error, or you have questions about the responsibilities involved, please contact orcid@royalsociety.org.nz

   This email was sent to jason.punh@royalsociety.org.nz

2. Clicking the link in the email message takes you to the Hub. Log in using the left hand option to log in via Tuakiri/REANNZ and enter your Tuakiri/REANNZ password.
   Once in the Hub, you will land on a screen asking you to go ORCID to request your organisation’s credentials (Client ID and Client Secret). Click on the appropriate button: Screenshot 2 (button circled; confirmation button for step 11 also circled):
3. Clicking the button in screenshot 2 takes you to ORCID’s website where you will land on a page with a form, mostly pre-filled, as shown in the screenshot below. You will need to provide a ‘Contact for receiving PIN to access credentials’; this can be either an alternative email address or a cellphone number (with international code). ORCID will use this to send you a PIN. Click ‘I’m not a robot’ at the bottom of this form and then click ‘request credentials’.
4. **Close your session, sit back and wait!** The next step is a manual one at ORCID support and can take up to three days. If, after this time, you haven’t had a response please let orcid@royalsociety.org.nz know and we’ll chase this for you.

5. ORCID will send you an email and PIN to access your credentials. Once you have your credentials you should enter them into the NZ ORCID Hub. Go to the Hub via the link below, sign in, and enter the credentials into the screen from step 2, https://orcidhub.org.nz/confirm/organisation screenshot 2

6. **Click on the ‘confirmation’ button at the bottom of the screen,** also circled in step 2, screenshot 2.

   NB: Until you successfully enter API credentials, the Hub should automatically open for you at that screen.

7. **You are the first person from your organisation in the Hub – you will need to allow the Hub to write an affiliation for you.** The Hub will automatically try to write this but will not know what type of affiliation to write (staff, student etc). There are a number of ways to tell the hub what type of affiliation you have with your organisation:

   - Go to https://orcidhub.org.nz/admin/viewmembers/, find yourself and edit your record to add employment;
   - Invite yourself as if you are a new user – check ‘staff’ box at the bottom of the screen https://orcidhub.org.nz/invite/user;

8. **Congratulations – you have onboarded your organisation to the NZ ORCID Hub.** You can invite all of your staff and students to create an ORCID iD or link their existing ORCID iD to your organisation, via the Hub, to have their employment/educational affiliation written. You can modify our model communication to tell your staff/students about ORCID and ask them to connect to you using the Hub. However, once onboarded, we will provide you with a version of this model, tailored to your specific organisation.