



# New Zealand ORCID Consortium

## NZ ORCID Consortium newsletter #12

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ORCID

Connecting Research  
and Researchers

Member  
Organization

### Advisory Committee

The advisory committee will meet again on the 4<sup>th</sup> April. We will have a new member at the next meeting, Mary-Anne Woodnorth, representing the District Health Boards.

The minutes of the committee's last meeting, as well as their poster outlining the vision for ORCID in New Zealand are [here](#).

Please feel free to print this poster and put anywhere that gets good foot traffic. We'd like to get it out there for people to see. In the near future you'll see our work on a social media campaign to push out the key messages from the poster.

### Collect & Connect Badges for Hub users

In the middle of last year ORCID changed their criteria for Collect & Connect badges, requiring us to make some technical adjustments in the Hub and add more information for users. We are pleased to report that the Hub now satisfies ORCID's new requirements for Connect & Connect badge eligibility and that ORCID are awarding four badges to ALL consortium members who have onboarded to the Hub:

Authenticate	Display	Collect	Connect
			

We will be sending the files for these badges, along with some text that explains what they mean, to all who have onboarded. You will be able to display them on your own ORCID information pages.

For those of you who aren't familiar with these badges, ORCID awards them to those organisations who satisfy a number of strict criteria. The badges cover both the technical and the communications requirements of ORCID and indicate that the organisations who receive them are contributing to researchers have the same experience of ORCID whenever they come into contact with it, no matter what organisation they are at or where they may go in future. To be awarded the badges organisations must give adequate information on what ORCID is and how to get an ORCID ID. Their technical integration must satisfy ORCID's

best practice requirements and organisations should give their researchers information on what they intend to do with any permission given to access researchers' ORCID iDs.

### Consortium 'Town Hall' meeting

We intend to hold an all consortium meeting via 'zoom' early this year, most likely in March or April, and would like as many consortium members' main, technical and organisation administrators as possible to join in. We want to hold conversations around consortium membership and the Hub – what benefits you are seeing now and/or hope to see in future, how the Hub is helping you realise these benefits and what, if any, additional functionality you would like to see in the Hub. This will help steer the final development phase of the Hub as we progress towards a stable, final version, requiring maintenance only. If there is anything specific you would find helpful to discuss at this all-consortium meeting please get in touch, as we want to make it as useful as possible to all members. We will shoulder tap a few people and ask them to talk about their experiences with ORCID and/or using the Hub at their own organisation so that we can all benefit from each other's experiences. Look out for an invitation in your mailbox soon.

### ORCID news

Our ORCID support person is now Brian Minihan. If you contact ORCID support, this is likely to be the person that your query will be steered to. Note that you should come to [orcid@royalsociety.org.nz](mailto:orcid@royalsociety.org.nz) first for help. We will escalate queries to ORCID if we can't answer them ourselves.

### Hub news

We see a core group of the same few people coming to our fortnightly Hub demos, at which the developers showcase recent Hub developments. Our sincere thanks to those who have taken the time to follow along with us; however this means that many of you won't be aware of the changes taking place as the Hub's development continues.

Recent changes include:

- Ability to write funding and works using a simple Excel/csv file where there is only ONE recipient/author. You will still need to use a json or yaml file for situations

where multiple funding recipients exist for a grant or where there are multiple authors on one work. Ask us if you don't know how to construct these files.

- Ability to export files in csv format
- The Hub's API is available. The developers would love people to use it and give some feedback on how it is working for them.
- Peer-review activity can be written by the Hub, although, as ORCID requires permanent identifiers for peer-reviews this can cause problems, depending on your own workflows. The new sections on 'membership and service' in API 3 may be a better way to capture this activity and we are exploring this for Marsden Fund panellists.
- Improvements to error messages for users have been made
- Users can now delete themselves from the Hub if they no longer want their organisation to access their ORCID iD (as well as removing that permission from within their ORCID record). Tech contacts/administrators are unable to do this until their organisation has nominated a replacement person to prevent the organisation being locked out of the Hub by accident. NB: This 'deleted' button can be found on a drop down link from the user's name on the top right of the Hub screen.
- We're still working on allowing a NZ RS&T Standard CV template to be exported from the Hub using information from a user's ORCID record. You can see the progress by clicking the 'Your CV' button on the 'Your ORCID' page in the Hub.

### [Hub success story – University of Canterbury](#)

University of Canterbury has generously agreed to share their Hub experience...

## **How we got 80% of our researchers through the NZ ORCID Hub, and no-one cried.**

Anton Angelo  
University of Canterbury Library

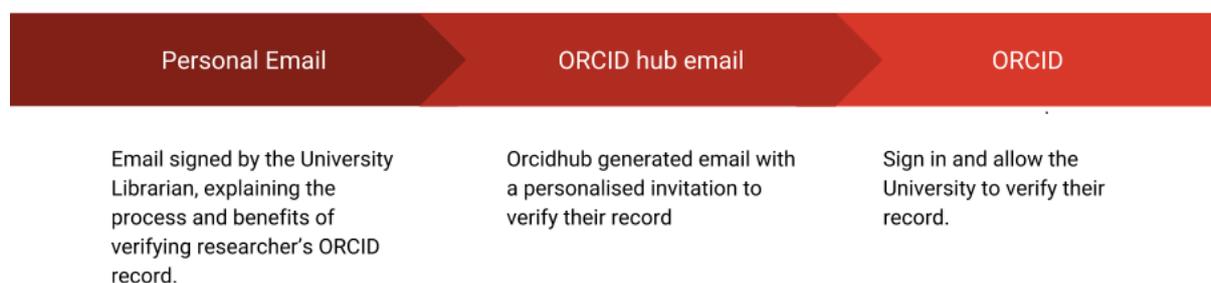
Getting academic staff to verify their ORCID record is a 'hard ask'. Getting academics to comply with any bureaucratic request is always fraught, and this one had a few things that made it harder. However we got about 80% of our active researchers to go through the New Zealand ORCID Hub, and verify themselves, with very little negative feedback.

### *Framing the Request*

Firstly, we thought about what the benefit was for the researcher. We framed this as a way to improve their ORCID record, or, if they didn't already have one, to generate one. Simply mentioning ORCID wasn't enough, as most would have already created an ORCID iD, and ignored our request if they considered it a suggestion just to sign up. Instead, we centered our communication around improving their record - pointing out the problem with potentially bogus ORCID iDs, and how theirs would be trusted. Also, that in the long term we would then be able maintain their record, and update it, so they no longer needed to.

### *Making the Ask*

We decided to take the 'email route' for inviting researchers to verify their accounts. Department by department, we took the appropriate information from our HR system, and fed it into the Hub. Prior to sending researchers an email from the NZ ORCID Hub I sent an email signed by the University Librarian, but from my personal email address, informing the researchers they would get shortly receive a Hub email. We also got the Hub 'whitelisted' centrally by our spam system, so Hub generated emails wouldn't get caught. We then generated the Hub invitations to researchers, which were partly branded with Canterbury's logo and signed by our PVC for Research.



### *Handling the Feedback*

As I had sent email from my account, I got the feedback - the vast majority of which was people being cautious about a potential scam. It was also an opportunity to engage with a few others that wanted to opt-out of the system (6 out of around 700), or personally explain what the implications of verifying themselves were. The majority of active researchers followed our instructions and signed up, usually within hours of getting the request. We contacted researchers three times in all, over six months, with reminders if they didn't sign up.

### *Why we think we were successful*

The responsiveness of the ORCID Hub development team was really impressive. As we went through the process any stumbling blocks that are to be expected with any new system were ironed out, and our expectations managed on what we could do. We were really impressed with the way the privacy and control of ORCID records, which are the researcher's, not any institutions, was built into the data model of the Hub itself.

Making the introduction to the invitations personal, from a real person in the library, encouraged trust in the communications, as opposed to a system generated email.

Using the email invitation process, rather than the “Tuakiri” system lowered the effort researchers had to put in to verify their ORCID records, with fewer systems to interact with.

### *Next Steps*

Loading data manually, even using CSV files, is time consuming and data quickly goes out of date. Our next project is to integrate our HR system and the Hub API, so that new researchers are automatically invited to verify their ORCID record, and any updates are pushed through to ORCID.

The old saying, “to understand a problem, first you have to solve it” implies the first iteration of your solution, in retrospect, can be improved on. Parts of the process to get data ready to load into the hub are really clunky, and involve an element of data munging that can be done far more cleanly, and more accurately.

If you're interested in following our process, the team that did this at Canterbury would be very happy to talk you through the process, and share any other experience we've had - you can contact us at [anton.angelo@canterbury.ac.nz](mailto:anton.angelo@canterbury.ac.nz)

### Your monthly ORCID data reports

All nominated ‘main contacts’ for consortium members, as well as those nominated by main contacts, should be receiving ORCID’s monthly newsletter. Please [contact us](#) if you expect to, but are not receiving it. This newsletter contains your member data reports that tell you how many ORCID IDs are currently registered with your organisation’s email domain and how many people have used your ORCID integration (i.e., the Hub and/or any in-house integration that is active).

### FAQ focus – new FAQ for Hub tech contacts/organisational administrators

Q Why aren't macrons displaying properly in users' ORCID records when I use the file upload method in the Hub?

A If you created your file for upload in Excel and saved it in csv format it will have (invisibly to you) corrupted those vowels that have macrons. To stop this happening save your file in Excel as "Unicode Text" (.txt), then rename the suffix to .tsv. Note that in Windows, and depending on your settings, your file may actually be named xxx.tsv.txt but the .txt may be invisible to you and will have to be removed manually.

To do this go to the Windows start-up button (bottom left of your screen), type the words: **folder options**, into the search box; a pop-up will appear on screen. Click the 'view' tab and

uncheck the box 'Hide extensions for known file types'. You will see that your saved file was actually named as xxxx.tsv.txt. Edit to remove the .txt ending before uploading to the Hub. We are happy to take suggestions for other newsletter content. If there is something you'd like to read about please let us know.

Our contact address is [orcid@royalsociety.org.nz](mailto:orcid@royalsociety.org.nz)

Previous NZ ORCID consortium newsletters are to be found at the bottom of the '[about the consortium](#)' page of our website.

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Our mailing address is:  
Royal Society Te Apārangi  
PO Box 598  
Thorndon, Wellington 6140  
New Zealand



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