

Onboarding your Organisation and Testing the NZ ORCID Hub

As your organisation's ORCID consortium technical contact, you are responsible for loading your organisation into the NZ ORCID Hub; this process is known as 'onboarding'.

Once your organisation has been onboarded to the NZ ORCID Hub, your staff/students will be able to visit the hub and link their ORCID records to your organisation.

Every consortium member's ORCID technical contact should:

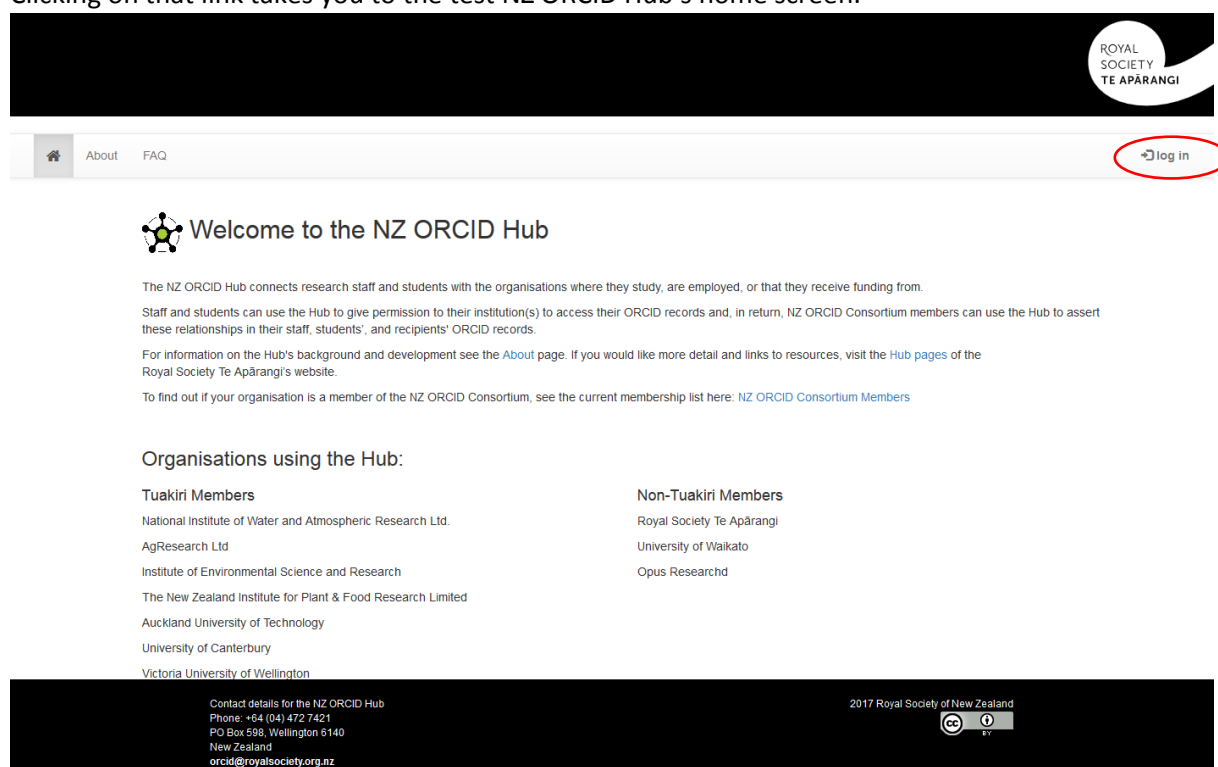
- 1 Go through the onboarding process in our test NZ ORCID Hub environment
- 2 Connect at least one test ORCID record to their organisation via the test NZ ORCID Hub to have the user's employment written to the record.

Once we are satisfied that the above has been successful we will ask you to repeat it in the real or 'production' Hub environment.

1. ONBOARDING PROCESS

1. Send us an email at orcid@royalsociety.org.nz to let us know you want to test the process. We will send you an email with the message, 'Welcome to the NZ ORCID Hub' with a link to click, asking you to confirm that you are the organisation's nominated technical contact.

Clicking on that link takes you to the test NZ ORCID Hub's home screen:




2. Click on the log-in button (top right) and select the option on the left hand side: Login via Tuakiri

Log in using your: ×

<p>Institutional credentials</p> <p>REANZ TUAKIRI</p> <p>I'm currently employed by, or studying, with a Tuakiri-member organisation</p> <p>Login via Tuakiri</p> <p>This log in takes you to the Tuakiri Directory Service where you can select your Home Organisation. Once returned to the Hub, you'll be able to give your organisation permission to write your affiliation to your ORCID record</p>	<p>ORCID record</p> <p>ORCID</p> <p>I'm the Tech Contact or Administrator for a Non-Tuakiri member organisation</p> <p>Login via ORCID</p> <p>This log in takes you to ORCID to let the Hub retrieve your ORCID ID. Once you've linked your ORCID ID to an organisation using the Hub, you can use this ORCID record to log in.</p>
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You can **only** log in with your ORCID record if you've already linked your ID via the Hub

3. Login using your Tuakiri sign-on – your usual method of signing into your institution. You will be taken to the page shown below from where **you will request your ORCID Client ID and ORCID client secret**, as shown – these will be your organisation's ORCID credentials that you, as technical contact, are responsible for.



NZ ORCID Hub About Jill Mellanby Log Out

If you currently don't know Client id and Client Secret, Please request these from ORCID by clicking on link 'Take me to ORCID to obtain Client ID and Client Secret' and come back to this form once you have them.

Organisation Confirmation Form

Organisation Name:

Organisation Email:

[Take me to ORCID to obtain my Client ID and Client Secret](#)

ORCID Client ID:

ORCID Client Secret:

Country:

City:

Organisation ID:

Source of the Organisation ID:

[Confirmation](#)

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You will receive an email from ORCID containing these credentials. This may take 1-2 days, as the request is handled manually.

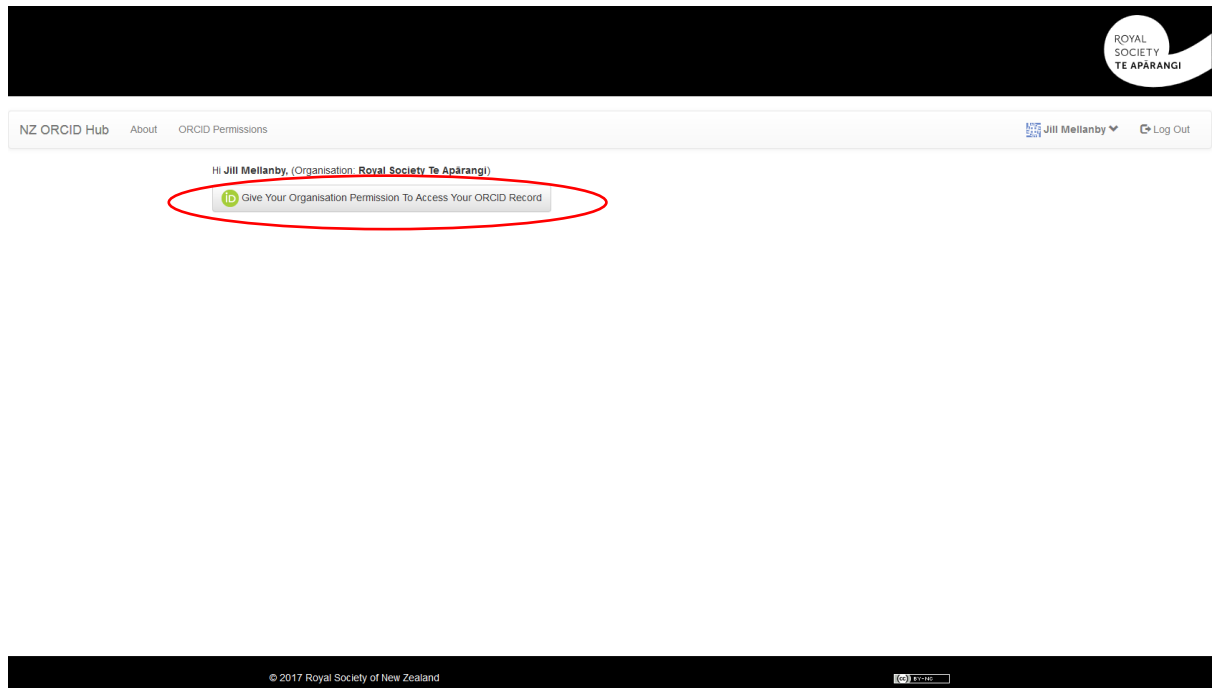
Once you receive these credentials from ORCID go back into the test hub <http://test.orcidhub.org.nz/> You should be returned to the page to enter your credentials into the Hub. If not, click on 'view your organisation's ORCID information' tab at the top of the screen.

Enter the credentials into the appropriate fields on the above page and click 'confirmation'.

A message will appear on screen telling you that your organisation has been onboarded. You will also receive an email from ORCID containing a similar message. If there's something wrong with the credentials you'll be warned; if problems persist please contact support.

2. TESTING THE HUB'S FUNCTIONALITY

1. Visit the test hub at <http://test.orcidhub.org.nz/>
2. Log-in using Tuakiri, as before.
3. Click on the button that asks you to give your organisation permission to connect to your ORCID ID as shown below



You will be taken to the ORCID sandbox as shown below. The ORCID sandbox is a replica of ORCID, used for testing. The minimum information that you need in order to create a sandbox ORCID ID is pre-filled for you: name and email address, (* see below). Enter a



password, go through ORCID's 'I'm not a robot' and click 'authorize'.

Warning! sandbox.orcid.org is a test website. ORCID.org is the official website. Sandbox only sends email messages to mailinator.com email addresses, see Sandbox FAQ for more information.

ORCID
Royal Society Te Apārangi
has asked for the following access to your ORCID Record

Add or update your research activities

☒ Allow this permission until I revoke it.
You may revoke permissions on your account settings page.
Unchecking this box will grant permission this time only.

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

Already have an ORCID ID? [Sign In](#)

As per ORCID's terms and conditions, you may only register for an ORCID ID for yourself.

First name

Last name

Email

Re-enter email

Create an ORCID password

Confirm ORCID password

Your ORCID ID connects with your ORCID Record that can contain links to your research activities, affiliations, awards, other versions of your name, and more. You control this content and who can see it.
By default, who should be able to see information added to your ORCID Record?

☒ ☐ ☐ ☐

Email frequency
The ORCID registry provides notifications about things of interest, like updates to your ORCID record or being made a trusted individual, when they occur (learn more about notifications). How often would you like these notifications delivered to you via email?

Weekly summary

☐ I'm not a robot

Terms of Use *

☒ I consent to the [privacy policy](#) and [terms and conditions](#) of use, including agreeing to my data being processed in the US and being publicly accessible where marked Public.

You must accept the [terms and conditions](#).

Deny

Authorize

You will then be taken back to the hub and given a message that your ORCID ID is now linked to your organisation.

Please log back in to [the ORCID sandbox](#) and check that your employment is now entered, with the source of the information being your employer.

If 1. and 2. above are successful please send us an email telling us that you are now ready to be onboarded to the 'real' production hub. You can have one, two, or as many other people from your organisation test and connect sandbox ORCID IDs to the hub, as further checks, if desired.

If, at any time you are confused or don't know what to do to onboard your organisation to the hub and test the hub's functionality please email us at orcid@royalsociety.org.nz or call Jill 04 471 8993 or Jason 04 470 5761

* The ORCID sandbox is a replica of ORCID, used for testing. The ORCID sandbox does not send emails to 'real' email addresses. If you want to check that your ORCID sandbox record is receiving the emails that a real ORCID account user would receive when going through the ORCID sign-up process, delete the email address pre-filled by the hub in the ORCID sandbox sign-up page and enter a mailinator email address.

Invent an email address of your choice with the suffix ...@mailinator.com (e.g. Pinocchio@mailinator.com or whatever you choose). You can then go to [mailinator](#) and check that address for emails from ORCID's sandbox.