

# Onboarding your Organisation to the NZ ORCID Hub, and Testing Hub

## Function – non Tuakiri consortium members

### Background

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

Once your organisation has been onboarded you, or your Organisation Administration colleague(s), will be able to test the Hub's functionality by uploading a comma separated or tab separated text file (csv or tsv) containing your staff/students' information. This information allows the Hub to write affiliations to ORCID records. **You must only write affiliations to your own organisation, even if you have staff members who have multiple affiliations to other organisations.**

**Note:** For testing, you will need a few volunteers from your organisation who are willing to create disposable sandbox ORCID records.

The minimum fields to be included in the file to allow the Hub to write a basic institutional affiliation to ORCID are:

- First name
- Last name
- Email address
- Affiliation type (staff – in which case a record is written to the employment section of ORCID, or student – in which case a record is written to the education section of ORCID)

A more detailed affiliation record will be written if more information is included in the file that you upload. As well as the required fields for a minimum affiliation entry, additional fields can be:

- Identifier (this can be your own internal code to allow you to identify and update information related to this individual affiliation in future)
- ORCID iD (if already known)
- Organisation (if different from your organisation, otherwise your organisation name is used)
- Department
- City (if different from your organisation's city, otherwise your city is used)
- Region
- Course or Title
- Start date (format must be YYYY-MM-DD; partial and full dates are allowed, e.g. 2017, 2017-08, 2017-08-04)
- End date (format as above)
- Country (if different from your organisation's country, otherwise your country (NZ) is used)

Two additional fields are available:

- Disambiguation ID
- Disambiguation ID source

If these are not specified, then the values we have recorded for your home organisation are used.

The 'Disambiguation ID sources' expected by ORCID are currently RINGGOLD, or FundRef.

Note that the Hub will use the organisation's default location (name, city, country, and disambiguation information) if these fields are missing or empty. If staff/students are at a particular campus/city that differs from the default home setting, please fill these in on the file and this information will be included in the affiliation section of ORCID records.

A [sample file](#) is available in the [NZ ORCID Hub Resources section](#) of our website. Please save as UTF-8 if non-ascii characters are present; if the text contains commas you may wish to use tabs to separate fields.

## A. Onboarding your organisation to the Hub

### 1. Set up a test sandbox ORCID account and make your email address visible to the Hub

Go to the ORCID sandbox at <https://sandbox.orcid.org/register>, register for a sandbox ORCID iD and, **crucially**, make your email address visible to trusted parties; this will allow the Hub to read your email address.

From your sandbox ORCID record, go to the account settings tab (illustrated on screenshot 1 below), and choose the top item on the menu, 'Email and contact preferences'. Once in that section, choose the middle of the three settings, shaped like a key; this will allow your email address to be read by the Hub (illustrated in screenshot 2 below):

is the official website. Sandbox only sends email messages to [mailinator.com](mailto:mailinator.com) email addresses, see [Sandbox FAQ](#) for more info.

The screenshot shows the ORCID website interface. At the top, there's a search bar and navigation tabs: FOR RESEARCHERS, FOR ORGANIZATIONS, ABOUT, HELP, and SIGN OUT. Below these are sub-tabs: MY ORCID RECORD, INBOX (12), ACCOUNT SETTINGS (selected), DEVELOPER TOOLS, and LEARN MORE. The user profile for Jill Mellanby is shown on the left. The main content area is titled 'Account settings' and lists various settings with 'Edit' links: Email and contact preferences (circled in red), Language display preferences, ORCID inbox notifications, Password, Privacy preferences, Security question, Deactivate account, and Remove duplicate record.

## Trusted organizations

You can allow permission for your ORCID Record to be updated by a trusted organization. [Find out more](#)

Trusted organization	Approval date	Access type

is the official website. Sandbox only sends email messages to [mailinator.com](mailto:mailinator.com) email addresses, see [Sandbox FAQ](#) for more info.

This screenshot shows the 'Email and contact preferences' section of the ORCID account settings. It lists the email address 'tissuebox@mailinator.com' as the 'Primary Email'. To the right of the email address, there are three icons: a person, a flame, and a lock, which are circled in red. Below the list, there is an 'Add Another Email' field and an 'Add' button. A note at the bottom states: 'As per ORCID's terms of use, you may only add email addresses that you have control over. An email to the added address will be sent immediately to ask for verification of address.'

Note: the ORCID sandbox is a site used for testing; it mimics the 'real' ORCID site but is cleaned out from time to time.

## 2. Ask us to send you an invitation to onboard

Once you have a sandbox ORCID with your email visible, ask us to send you an invitation to the Hub. The invitation to which this email is sent must be the same email address you have used in your sandbox ORCID record. The screenshot below shows the email you will receive.

The screenshot shows an email from the Royal Society Te Apārangi. The header includes the organization's logo and name. The body of the email says: 'Welcome to the NZ ORCID Hub', 'Welcome!', 'Royal Society Te Apārangi is just one step from being onboarded onto the NZ ORCID Hub.', 'Please either click on the link below to confirm your role as this organisation's Technical Contact: <https://dev.orcidhub.org.nz/u/F-zZ1B>', 'If you received this email in error, or you have questions about the responsibilities involved, please contact: [orcid@royalsociety.org.nz](mailto:orcid@royalsociety.org.nz)', 'This email was sent to [jm.orcid.renz@gmail.com](mailto:jm.orcid.renz@gmail.com)'. The footer contains contact details for the NZ ORCID Hub: 'Contact details for the NZ ORCID Hub', 'Phone: (04) 472 7421', 'PO Box 598, Wellington 6140', 'orcid@royalsociety.org.nz'.

### 3. Sign into ORCID and 'authorize'

Clicking on the link in the invitation email takes you to the ORCID sandbox from where you will be asked to register/sign-in. As you have already set up an ORCID iD, choose 'sign in', and then 'authorize' from the next screen, screenshots below:

ORCID

[Sign into ORCID or Register now](#)

☐ Personal account ☐ Institutional account

Sign in with your ORCID account

Email or iD

ORCID password

[Sign into ORCID](#)

[Forgotten your password?](#)

Sign in with a social media account ?

ORCID

Shadow Mellanby

<http://sandbox.orcid.org/0000-0003-4559-3500>

(Not You?)

**NZ ORCID Hub** ?

has asked for the following access to your ORCID Record

Get your ORCID iD

☒ 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](#).

[Authorize](#)

[Deny](#)

### 4. Request your organisation's credentials

You will now be taken to the Hub's 'Organisation Confirmation Form' 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.

**Info!** 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 \*

Royal Society Te Apārangi

Organisation EmailId \*

jm.orcid.rsnz@gmail.com



Take me to ORCID to obtain my Client ID and Client Secret

Organisation Orcid Client Id: \*

Organisation Orcid Client Id:

Organisation Orcid Client Secret: \*

Organisation Orcid Client Secret:

Country \*

New Zealand

City \*

Wellington

Disambiguated Id \*

210126

Disambiguation Source \*

RINGGOLD

Confirmation

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

### 5. Enter your credentials into the Hub

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'. You may now go back to your sandbox ORCID record and change the email visibility setting back to 'private', if preferred.

## B. Testing the Hub

To test the Hub you will upload a csv/tsv file of people at your organisation, as described earlier, in 'Background'. Some volunteers from your organisation will be required for this testing phase. They will need to create a sandbox ORCID record, but they need not change the visibility setting of their email address.

### 1. Upload a file of staff/students

Go the test Hub at <https://test.orcidhub.org.nz/load/researcher>, log in, using the ORCID log-in option and upload your csv or tsv file in the 'affiliations/upload affiliations tab' – screenshot below

Researcher Info Upload

File \*

Browse... No file selected.

Upload

Please format your affiliation data as a comma-separated or tab-separated text file, with the first row being the headers matching any of the following allowed fields:

- Identifier (optional);
- First name;
- Last name;
- Email;
- ORCID ID;
- Organisation;
- Department;
- City;
- Region;
- Course or Title;
- Start date;
- End date;
- Affiliation type;
- Country;
- Disambiguation ID;
- Disambiguation Source.

From the list displayed on screen, either click in the left hand 'list' box of each person that you wish to 'activate' or click in the top 'list' button to select all, then click on the 'activate all' button, top right (screenshot below):

### Sample\_CSVShadow\_file\_for\_importing\_to\_hub.csv

Task Filename	Sample_CSVShadow_file_for_importing_to_hub.csv
Organisation	Royal Society Te Apārangi
Completed At	
Submitted At	2017-09-12 21:04

List (1) Export With selected Search

Activate all

	Put Code	External Id	First Name	Last Name	Email	Orcid	Affiliation Type	Role	Department	Start Date	End Date	City	State	Country	Disambi Id
<input type="checkbox"/>		1	Shadow	Mellanby	jm.orcid.rsnz@gmail.com		student								

Each person on your file will now be sent an email from the Hub inviting them to link their ORCID iD (or set one up if they haven't got one) to your organisation, allowing them to have an affiliation written to their ORCID record. They should check their sandbox ORCID records to ensure that their affiliation has been written, as expected. It may take a few minutes for this to happen. The more information in your csv/tsv file, the more information will be written to the ORCID record.

## **2. Export and save your information**

Your task is over. When all the users have given you permission to write to their ORCID records and the affiliations have been written you will automatically receive a notification email from the Hub, giving you a link to a file of the affiliations to export.

Please export the file and save it to your HR system or another safe place. This file contains the list of people you have uploaded along with the ORCID IDs retrieved by the Hub and a 'PUT' code for each affiliation item written. The information in this file will be needed should you wish to update those ORCID affiliations in future (e.g. with end dates).

In order to do this kind of update, upload a new file of affiliations that contains these 'PUT' codes and the Hub will write this information to the existing affiliation item, rather than creating new affiliations. As long as the individuals have your organisation in the Trusted-Parties on their ORCID record, these changes happen automatically and don't require their action in any way.

## **Onboarding to the production Hub**

Once you have been through the above process in the 'test Hub' and are ready to onboard to the production Hub, please send us an email to [ORCID@royalsociety.org.nz](mailto:ORCID@royalsociety.org.nz) and we will send you an invitation.

You should have a communications strategy in place at your organisation to inform your staff/students about your use of the Hub. Users should know to expect an email from the Hub asking them to link their ORCID iD (or create one and link it) to your organisation to have an affiliation written for them in their record. If you are interested in having this invitation email to your staff/students branded with your own organisation's look and feel, please contact us about testing this.