



---

# Welcome to the 16TH Annual **EMUG** **BOSTON**

---

## #EMUG2018

 Editorial Manager®  ProduXion Manager®

---



# "Identity Confidence Score" & People Record Management

**Stacey Lavelle**

Senior Business Analyst

slavelle@ariessys.com

16<sup>th</sup> Annual  
**em** Editorial Manager<sup>®</sup>  
User Group Meeting

**Aries**  
systems

# Identity Confidence Score

New in EM version 15.1



# Identity Confidence Score (ICS)

- There have been various cases of questionable authorship and fraudulent peer review in the news the past few years.
- Editors need a way to feel confident that Authors and Reviewers are who they say they are – actual real people!
- **SOLUTION:** EM generates a 'confidence score' for corresponding/contributing Authors and suggested Reviewers, based on factors such as ORCID, Ringgold institution, country selection, email verification, and other sources.



# ICS Indicators – Displayed for Author names in 12 Editor folders



No Score



Pass



Alert



High Alert



Editor Override

Quicklinks

### New Submissions - Mary Mary, PhD, MD

Contents: These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort order.

Page: 1 of 2 (11 total submissions) 1 2 ▶▶

Action	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Manuscript Number
<a href="#">Action Links</a>	Drought in the Office	Harry Henderson	May 25 2018 3:20PM	May 25 2018 3:20PM	Submitted to Journal	
<a href="#">Action Links</a>	Mookie Betts is on Fire	Grover Alexander	May 23 2018 3:12PM	May 23 2018 3:12PM	Submitted to Journal	
<a href="#">Action Links</a>	Google Duplex: AI Appointment Maker	Franklin D. Roosevelt M.D. 	May 23 2018 1:26PM	May 23 2018 1:26PM	Submitted to Journal	



# ICS - Automatic Triggers
























- New or revised submission received by publication
- Author, Editor or Publisher edits the submission metadata
- Co-Author information is updated
- Co-Author confirms authorship (Co-Author Verification)
- Submission transferred in from another publication
- “On the fly” – Authorized Editor can initiate the ICC manually

# ICS Indicators – Displayed on Details and Search Submissions

**Details for Manuscript Number: Unassigned "Technically, It Is Already Spring"**

Cancel Save Save and Close





Manuscript Notes Production Notes Editors Reviewers Alternate Reviewers Reviewers Proposed by Editors Additional Information


<b>Additional Manuscript Details:</b>	<a href="#">Add/Edit Additional Manuscript Details</a>
<b>Corresponding Author:</b>	✉ Franklin D. Roosevelt      North Andover, MA UNITED STATES [Proxy]
<b>Corresponding Author E-Mail:</b>	<a href="mailto:trash449@ariessc.com">trash449@ariessc.com</a>
<b>Author Comments:</b>	
<b>Other Authors:</b>	✉ Oscar Zamora   ✉ Nora Ephron   <a href="#">Author Status</a>
<b>Author Questionnaire Summary:</b>	<a href="#">View Author Questionnaire Summary</a>
<b>First Author:</b>	✉ Franklin D. Roosevelt, M.D.      <a href="mailto:trash449@ariessc.com">trash449@ariessc.com</a>
<b>All Authors:</b>	✉ Franklin D. Roosevelt, M.D.      [Prox] ✉ Oscar Zamora   ✉ Nora Ephron   <a href="#">Author Status</a>
<b>All Authors Secondary Information:</b>	
<b>Conflict of Interest:</b>	<a href="#">View COI Disclosure</a>
<b>Short Title:</b>	

**Search Submissions - Search Results**  
Article Title is containing 'Google Duplex: AI Appointment Maker'

Quicklinks

Page: 1 of 1 (1 total submissions) 1

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type
<ul style="list-style-type: none"> <li>View Submission</li> <li>Details ▾</li> <li>Initiate Discussion</li> <li>History</li> <li>Technical Check</li> <li>File Inventory</li> <li>Edit Submission</li> <li>Classifications</li> <li>Remove Submission</li> <li>Send Back to Author</li> <li>Set Final Disposition</li> <li>Initiate Production</li> <li>Similar Articles in MEDLINE</li> <li>Send E-mail</li> <li>Linked Submissions</li> </ul>			Franklin D. Roosevelt    	Google Duplex: AI Appointment Maker	Original Study-All 4 Payment Methods



# ICS Indicators – Displayed on Authors Details (All Authors)

### Author Details for Manuscript Number: Unassigned Google Duplex: AI Appointment Maker

[Close](#)

[View Author Questionnaire Summary](#)

**Corresponding Author Status**

Order	Author Name	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	Franklin D. Roosevelt	trash449@ariessc.com	0000-0001-5187-2798	M.D.		<a href="#">View Author Details</a> <a href="#">View Questionnaire Responses</a>

**Other Author Status**

Order	Author Name	Added in Revision	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Institution	Confirmed?	Options
▲▼	▲▼	▲▼				▲▼	▲▼	▲▼	
2	Melanie Courtright	R0	lhildreth@ariessys.com <a href="#">Edit</a>	0000-0002-1920-2660			Courtauld Institute of Art	Yes May 23 2018 2:05 PM	<a href="#">Reset Confirmation Status</a> <a href="#">View Author Details</a>
3	Joan Bissell	R0	lhildreth@ariessc.com <a href="#">Edit</a>				Oxford Brookes University	No Response	<a href="#">Resend Letter</a> <a href="#">View Author Details</a>

To update the Co-Author's e-mail address that is associated with the submission, please click on the 'Edit' link. To save your changes please click on the 'Save' link.

To resend letters to all Other Authors with a status of 'No Response' and send letters requesting verification to Other Authors who have never been notified, click the 'Send Letters' button. To send an individual letter, please use the link next to that Author's name.

[Send Letters](#)



# ICS Indicators – Displayed when searching for Reviewers suggested by Author


## Author's Reviewer Preferences

Close

### Suggested Reviewers

John Q Pajinsky   
jqp@emtesting.co.uk

He's my best friend and would give me an easy time.

Paul Mccartney   
University of Liverpool  
pmc@emtesting.co.uk

None, really - never heard of the guy

Close

## Search for Reviewer Suggested by Author All Reviewers - Manuscript Number Test-2017-08-21-01 Anne Author Sample of co-author verification in nine easy examples

[Author's Reviewer Preferences](#) [Manuscript Details](#)  [Register and Select New Reviewer](#)

### Change Search Type



Search My Publication

Suggested by Author


from All Reviewers


Go

### Reviewers Suggested By Author

John Q Pajinsky , jqp@emtesting.co.uk; Paul Mccartney , pmc@emtesting.co.uk;

The following Reviewers suggested by the Author were not found in the system.

John Q Pajinsky  [Register and Select New Reviewer](#)

Paul Mccartney  [Register and Select New Reviewer](#)

[Register and Select New Reviewer](#)  
[Request Unregistered Reviewer](#)  
[My Suggest Reviewer Preferences](#)  
[Editor Main Menu](#)





# ICS – Editor can calculate score dynamically

Quicklinks

**New Submissions - Mary Mary, PhD, MD**

Contents: These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort order.

Page: 1 of 2 (11 total submissions) 1 2 ▶▶

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
<ul style="list-style-type: none"><li>View Submission Details ▾</li><li>Initiate Discussion History</li><li>Technical Check</li><li>File Inventory</li><li>Edit Submission</li><li>Send Back to Author</li><li>Remove Submission</li><li>Classifications</li><li>Set Final Disposition</li><li>Initiate Production</li><li>Similar Articles in MEDLINE</li><li>Send E-mail</li><li>Linked Submissions</li></ul>		Original Study-All 4 Payment Methods		Technically, It Is Already Spring	Franklin D. Roosevelt M.D.    	Mar 27 2018 10:37AM	Mar 27 2018 10:37AM	Submitted to Journal

Franklin D. Roosevelt, M.D. 

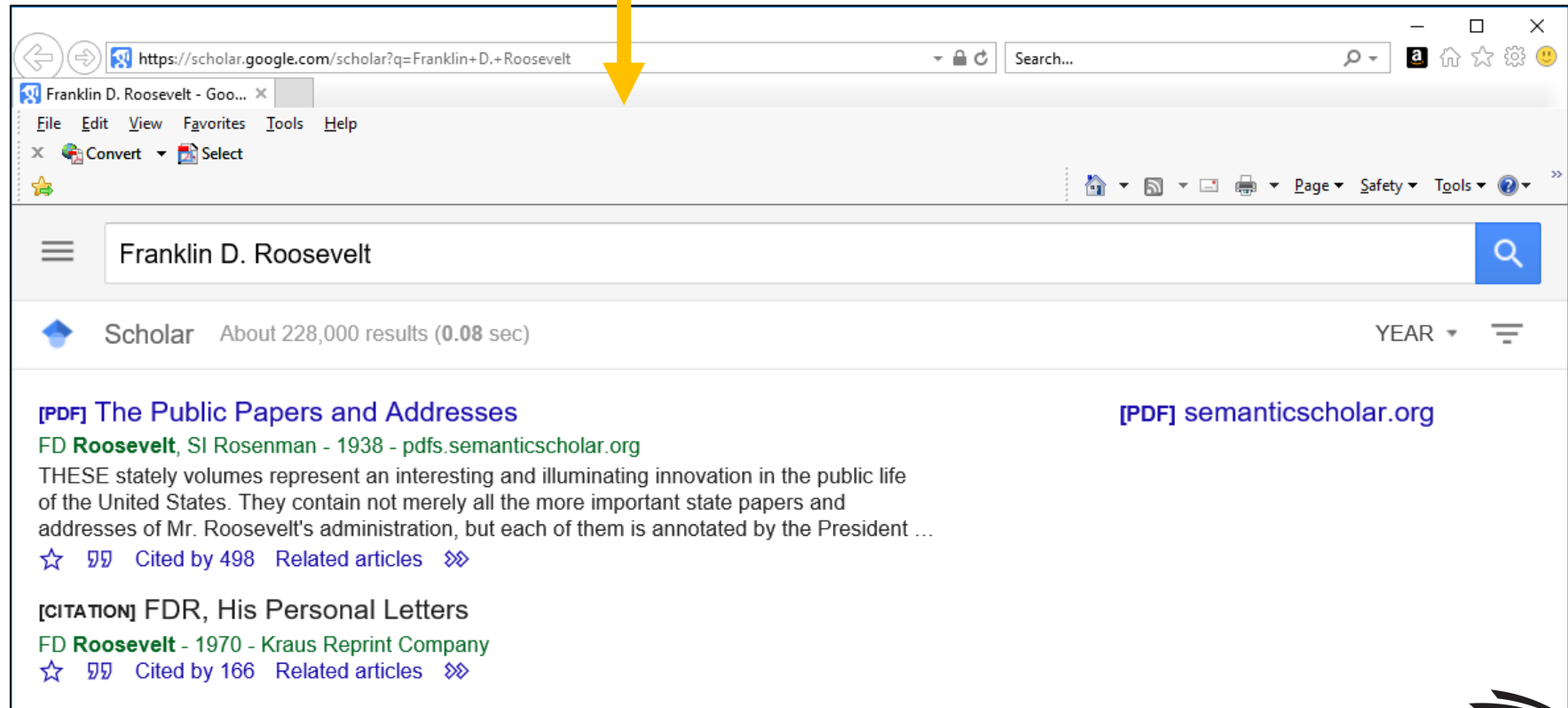
[Search Google Scholar](#)

The Identity Confidence Check has never been run for this person. Click the 'Check Now' button to calculate the score.

Check Now

People Activity Details

Close



https://scholar.google.com/scholar?q=Franklin+D.+Roosevelt

Franklin D. Roosevelt

Scholar About 228,000 results (0.08 sec) YEAR

[\[PDF\] The Public Papers and Addresses](#) [\[PDF\] semanticscholar.org](#)  
FD **Roosevelt**, SI Rosenman - 1938 - pdfs.semanticscholar.org  
THESE stately volumes represent an interesting and illuminating innovation in the public life of the United States. They contain not merely all the more important state papers and addresses of Mr. Roosevelt's administration, but each of them is annotated by the President ...  
☆ [Cited by 498](#) [Related articles](#)

[\[CITATION\] FDR, His Personal Letters](#)  
FD **Roosevelt** - 1970 - Kraus Reprint Company  
☆ [Cited by 166](#) [Related articles](#)

# Franklin D. Roosevelt, M.D.

[Search Google Scholar](#)

The Identity Confidence Check has never been run for this person. Click the 'Check Now' button to calculate the score.

Check Now

People Activity Details

Close

# Franklin D. Roosevelt, M.D.

[Search Google Scholar](#)

The Identity Confidence Check has never been run for this person. Click the 'Check Now' button to calculate the score.

Check Now

People Activity Details

Close

The Identity Confidence Check is now running. When it is complete, an updated level of confidence indicator will be displayed for this person.

OK

## People Information - Franklin D. Roosevelt, M.D.

[Summary Statistics](#) [Detailed Statistics](#) [Invited Author Statistics](#) [Similar Articles in MEDLINE](#)

Cancel Save and Close

### General Information

[Open Special Character Palette](#)

Permanent Address:  
(Current Address) 220 Sutton St.  
North Andover, MA 01845  
UNITED STATES  
978-975-8769  
FAX: 978-975-3811  
[trash449@ariessc.com](mailto:trash449@ariessc.com)

Secondary Information:  
People URLs: None  
Unavailable Dates: None  
Role: Author  
ORCID: [0000-0001-5187-2798](#)

### Detailed People Notes

Add New Note: 

Character Count: 0 / 4000

Submit Note

View/Print All

Operator

Note

Date

No Detailed People Notes are available

### New Submissions - Mary Mary, PhD, MD



Contents: These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort order.


Page: 1 of 2 (11 total submissions)

1 2 ▶▶


Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
<ul style="list-style-type: none"><li>View Submission Details</li><li>Initiate Discussion History</li><li>Technical Check</li><li>File Inventory</li><li>Edit Submission</li><li>Send Back to Author</li><li>Remove Submission</li><li>Classifications</li><li>Set Final Disposition</li><li>Initiate Production</li><li>Similar Articles in MEDLINE</li><li>Send E-mail</li><li>Linked Submissions</li></ul>		Original Study-All 4 Payment Methods		Technically, It Is Already Spring	Franklin D. Roosevelt M.D.	Mar 27 2018 10:37AM	Mar 27 2018 10:37AM	Submitted to Journal

Franklin D. Roosevelt M.D.

# ICS Scorecard Example – Overall score is ‘Pass’

**Franklin D. Roosevelt, M.D.** 


[Search Google Scholar](#)

<b>Email Domain</b> ✔ trash449@ariessc.com	
<b>Country/Region</b> ✔ UNITED STATES	
<b>EM Activity</b> ✔ This person has authored 36 accepted submissions to this publication This person has submitted 5 invited papers to this publication	
<b>ORCID Activity</b> ✔ 0000-0001-5187-2798 	

[Recalculate Now](#) [Override Score and Trust this Person](#) [People Activity Details](#) [Close](#)

*Score generated: 05/31/2018 13:28:34*

# ICS Scorecard Example – Overall score is ‘High Alert’

**Grover Alexander**  [Search Google Scholar](#)

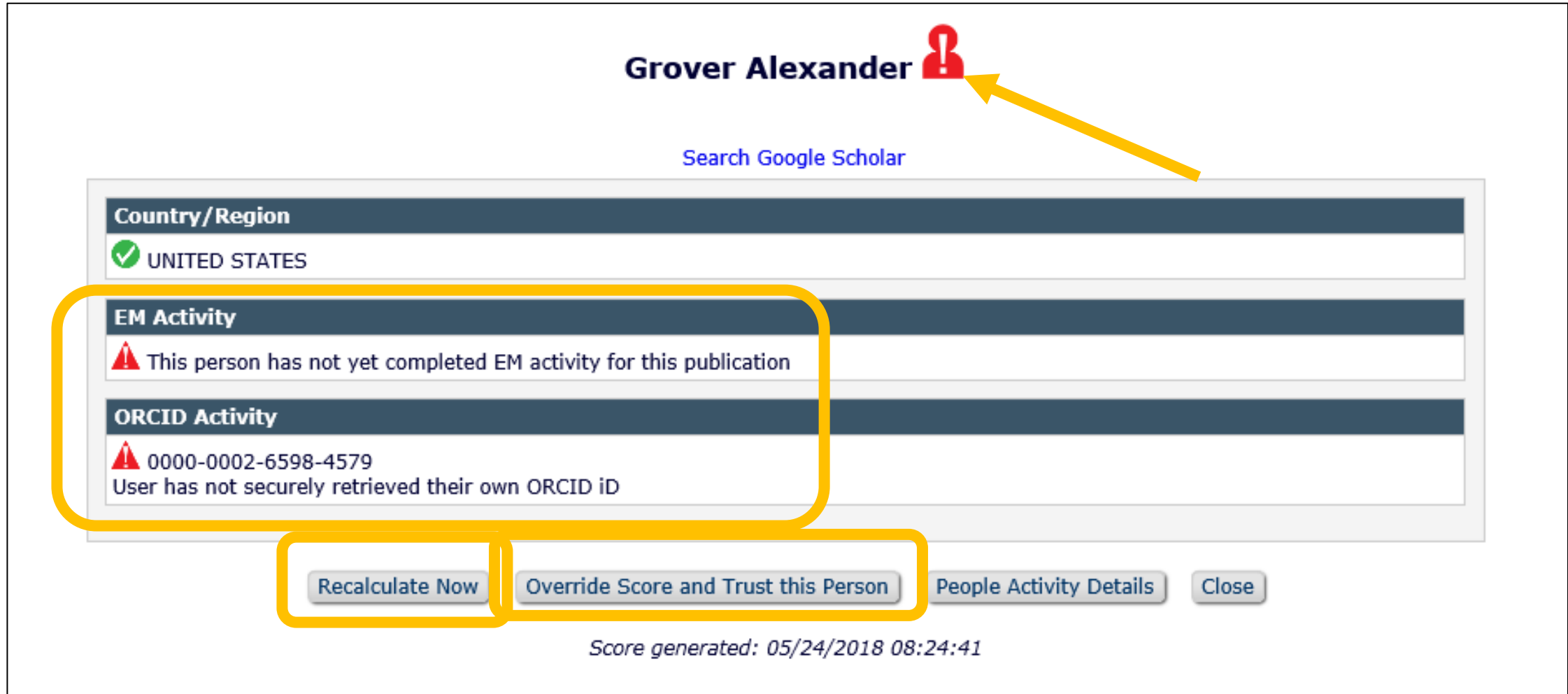
**Country/Region**  
✔ UNITED STATES

**EM Activity**  
⚠ This person has not yet completed EM activity for this publication

**ORCID Activity**  
⚠ 0000-0002-6598-4579  
User has not securely retrieved their own ORCID iD

[Recalculate Now](#) [Override Score and Trust this Person](#) [People Activity Details](#) [Close](#)

*Score generated: 05/24/2018 08:24:41*



# ICS Override indicates trust, despite the personal information supplied

Quicklinks


**New Submissions - Mary Mary, PhD, MD**


Contents: These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort order.

Page: 1 of 2 (11 total submissions) 1 2 ▶▶

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
<ul style="list-style-type: none"> <li>Initiate Production</li> <li>Similar Articles in MEDLINE</li> <li>Send E-mail</li> <li>Linked Submissions</li> </ul>								
<ul style="list-style-type: none"> <li>View Submission Details</li> <li>Initiate Discussion History</li> <li>Technical Check</li> <li>File Inventory</li> <li>Edit Submission</li> <li>Send Back to Author</li> <li>Remove Submission</li> <li>Classifications</li> <li>Set Final Disposition</li> <li>Initiate Production</li> <li>Similar Articles in MEDLINE</li> <li>Send E-mail</li> <li>Linked Submissions</li> </ul>		Original Study-All 4 Payment Methods		Duplicate: pointment	Franklin D. Roosevelt M.D.	May 23 2018 1:26PM	May 23 2018 1:26PM	Submitted to Journal
<ul style="list-style-type: none"> <li>View Submission Details</li> <li>Initiate Discussion History</li> <li>Technical Check</li> <li>File Inventory</li> <li>Edit Submission</li> <li>Send Back to Author</li> <li>Remove Submission</li> <li>Classifications</li> <li>Set Final Disposition</li> <li>Initiate Production</li> <li>Similar Articles in MEDLINE</li> </ul>		Rapid Communication		Mookie Betts is on Fire	Grover Alexander	May 23 2018 3:12PM	May 23 2018 3:12PM	Submitted to Journal

Grover Alexander







# ICS Information available in EAR and Custom Report (Authors and Submissions View)

Data Sources | Fields | Summary | Chart | Gauge | Misc | Style | Filters | Preview

Report List | New | Save | Save As... | Print | SQL | Results 1000

Records

Field	Description	Sort	VG	A	Function	Format					
All Authors Identity Confidence Score	All Authors Identity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corresponding Author First Name	Corresponding Autl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corresponding Author Last Name	Corresponding Autl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corresponding Author Identity Confidence Score	Corresponding Autl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corresponding Author Identity Confidence Score Override	Corresponding Autl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manuscript Number	Manuscript Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initial Date Submitted	Initial Date Submitte	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	Short Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add Subtotals

Quick Add | Add Pivot | Continue to Summary | Preview

# ICS Information available in EAR and Custom Report (Authors and Submissions View)

All Authors Identity Confidence Score	Corresponding Author First Name	Corresponding Author Last Name	Corresponding Author Identity Confidence Score	Corresponding Author Identity Confidence Score Override	Manuscript Number	Initial D
Amy R. Author, MBA()	Amy	Author				6/1/2018
Big Bird (88.89 %); Michael Greenwell (68.75 %); Big Bird (88.89 %); Michael Greenwell (68.75 %); Frank Page (42.86 %); Andy Inhatko (87.50 %); Rene Richards (100.00 %)	Bird	Bird	89	False		5/23/2018
Buffy Anne Summers, PhD()	Buffy	Summers				6/1/2018
Daniel Baumgart (61.54 %)	Daniel	Baumgart	62		LC DEV151-D-18-00014	6/1/2018
Daniel Baumgart (61.54 %); Ilja Wende(); Ulrike Grittner()	Daniel	Baumgart	62		LC DEV151-D-18-00013	6/1/2018
Franklin D. Roosevelt, M.D. (100.00 %); Harold M. Stevens()	Franklin	Roosevelt	100		LC DEV151-D-18-00008	5/30/2018
Franklin D. Roosevelt, M.D. (100.00 %); Helen Smith()	Franklin	Roosevelt	100		LC DEV151-D-18-00007	5/30/2018
Franklin D. Roosevelt, M.D. (100.00 %); J L Benedict()	Franklin	Roosevelt	100		LC DEV151-D-18-00010	5/30/2018
Franklin D. Roosevelt, M.D. (100.00 %); Kevin McGann()	Franklin	Roosevelt	100		LC DEV151-D-18-00009	5/29/2018
Franklin D. Roosevelt, M.D. (100.00 %); Melanie Courtright(); Joan Bissell (100.00 %)	Franklin	Roosevelt	100			5/23/2018
Franklin D. Roosevelt, M.D. (100.00 %); Nicholas Rondinone(); Matthew Ormseth()	Franklin	Roosevelt	100			5/16/2018
Franklin D. Roosevelt, M.D. (100.00 %); Robin Altaras()	Franklin	Roosevelt	100		LC DEV151-D-18-00012	6/1/2018
Franklin D. Roosevelt, M.D. (100.00 %); S C Levinson()	Franklin	Roosevelt	100		LC DEV151-D-18-00011	5/30/2018
Franklin D. Roosevelt, M.D.()	Franklin	Roosevelt			LC DEV151-D-18-00015	6/13/2018
Grover Alexander (100%)	Grover	Alexander	30	True		5/23/2018
Harry Anthony Alves (100.00 %); Catherine Wolters (37.50 %)	Harry	Alves	100		LC DEV151-D-18-00006	5/22/2018
Harry Anthony Alves (100.00 %); Samantha Thurmond (37.50 %); Glenda Jackson (37.50 %)	Harry	Alves	100		LC DEV151-D-18-00005	5/22/2018
Harry Anthony Alves (100.00 %); Samantha Thurmond (42.86 %); Glenda Jackson (42.86 %); Wilma Flintstone (100.00 %)	Harry	Alves	100		LC DEV151-D-18-00005	5/22/2018
Harry Henderson (11.11 %); Samantha Thurmond(); Ronald Myer (25.00 %)	Harry	Henderson	11			5/25/2018

# ICS – Highly Configurable!



- PolicyManager >>  
Configure Identity  
Confidence Check

**PolicyManager Main Menu**

[Expand All](#)   [Collapse All](#)

- Registration and Login Policies**
- Status Policies**
- Submission Policies**
- Questionnaire Policies**
- Additional Data Policies**
- Editor Assignment Policies**
- Suggest Editor Policies**
- Reviewer and Editor Form Policies**
- E-mail and Letter Policies**
- General Policies**
  - [Set Manuscript Number Type](#)
  - [Set Manuscript Number Revision Suffix](#)
  - [Set Date Format](#)
  - [Set Time Zone Display Policy](#)
  - [Configure Unavailability Check and Instructions](#)
  - [Configure Identity Confidence Check](#)
  - [Set ISO Country Standard](#)
  - [Configure General Due Date Preferences](#)
  - [Set Reviewer Preferences](#)
  - [Configure Electronic Calendar Due Date Preferences](#)
  - [Set Editor Deep Link Expiration](#)
  - [Set Enterprise Analytics Reporting Deep Link](#)
  - [Set View Reviewer Comments for Author Deep Link Expiration](#)
  - [Define Details Page Layouts](#)



# ICS Configuration (PolicyManager)

## Configure Identity Confidence Check

EM can be configured to carry out an Identity Confidence Check on Corresponding Authors, Co-Authors and Reviewers suggested by the Author on submission. This check looks for signs that the personal information supplied is trustworthy, and displays a visual indication of the confidence level next to the person's name in key folders early in the editorial process. (more...)

Enable Identity Confidence Check

Factor	Level of Importance 1 = lowest 5 = highest	Corresponding Author	Co-Authors	Suggested Reviewers **	
Email Domain	1 ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Configure
Institution *	3 ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure
Country/Region	3 ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Configure
EM Activity	3 ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Configure
ORCID Activity	5 ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Configure

\*Institution is excluded from the Identity Confidence Check if Institution Name Normalization is not enabled.

\*\* Suggested Reviewers are excluded from the Identity Confidence Check if no Article Types are configured with the Suggest Reviewer submission step displayed.

# ICS – Email Domain Exceptions

- Pass/Alert/High Alert categories
- Domains not listed are ignored in the score
- Can use wildcards
  - For example, yahoo.co\* includes the following domains: yahoo.com, yahoo.co.jp, yahoo.co.fr, etc.
  - Entry of \*.ac.\* includes academic institution domains in many countries.

### Configure Email Domain Exceptions for Identity Confidence Check

Please enter any email domain extensions you want specified as exceptions. Wildcards (\*) may be used to extend the breadth of email domains covered. For example, yahoo.co\* includes the following domains: yahoo.com, yahoo.co.jp, yahoo.co.fr, etc. Entry of \*.ac.\* includes academic institution domains in many countries. The information entered below should include everything after the @ for the email domain.

Email addresses evaluated with these domains are allocated a pass, alert or high alert on the Identity Confidence Scorecard. If a person has an email domain that is not specified on this page, the email address is ignored by the Identity Confidence Check for that person.

You must click the 'Submit' button to apply any changes to the email domain exceptions.

#### Pass

*.ac.*	Remove	Edit
*.edu	Remove	Edit
.gov	Remove	Edit
.mil	Remove	Edit

#### Alert

aol.com	Remove	Edit
gmail.com	Remove	Edit
hotmail.com	Remove	Edit
yahoo.*	Remove	Edit

#### High Alert

# ICS – Institution Exceptions

- INN must be enabled (institutions are associated with Ringgold ID)
- Institutions with Ringgold ID = Pass
- Institutions without Ringgold ID = Alert or High Alert

## Configure Institution Assessment Option for Identity Confidence Check

Institution Name Normalization (INN) must be enabled in order for Institution to be included in the Identity Confidence Check. To confirm that INN is enabled for this site, click [here](#).

When INN is enabled and a user selects or enters an Institution recognized by Ringgold in EM, a Ringgold ID is assigned behind the scenes. Since the Ringgold ID is a universally recognized identifier in the publishing industry, the Identity Confidence Check views a person associated with a Ringgold institution positively and a 'Pass' score is applied towards the Identity Confidence Score.

If the Institution is not supplied for the person being evaluated, Institution cannot be assessed and is ignored by the Identity Confidence Check. If the Institution name is populated but is not associated with a Ringgold ID, you may designate below whether an 'Alert' or 'High Alert' is applied toward the overall score.

To learn more about Ringgold Identifiers go to <https://www.ringgold.com/identify/>.

- Alert  
 High Alert

Cancel

Submit

# ICS – Country/Region Exceptions

- All countries are default
- Can assign countries to Alert

## Configure Country/Region Exceptions for Identity Confidence Check

Below you may designate which countries/regions are allocated an Alert or High Alert designation when the person being evaluated for the Identity Confidence Check is associated with that country/region. If all countries/regions are listed in the Pass column, country is not evaluated in the Identity Confidence Check.

You can modify the lists by selecting all, or choosing one or more values in one list and clicking the appropriate 'Move To' button. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, hold down the 'Command' key while using the mouse to select the desired items..

You must click the 'Submit' button to apply any changes to the country/region exception.

### Pass

Select All / Clear All

UNITED STATES (US)  
AFGHANISTAN (AF)  
ÅLAND ISLANDS (AX)  
ALBANIA (AL)  
ALGERIA (DZ)  
AMERICAN SAMOA (AS)  
ANDORRA (AD)  
ANGOLA (AO)  
ANGUILLA (AI)  
ANTARCTICA (AQ)  
ANTIGUA AND BARBUDA (AG)  
ARGENTINA (AR)  
ARMENIA (AM)  
ARUBA (AW)  
AUSTRALIA (AU)  
AUSTRIA (AT)  
AZERBAIJAN (AZ)  
BAHAMAS (BS)  
BAHRAIN (BH)  
BANGLADESH (BD)  
BARBADOS (BB)  
BELARUS (BY)  
BELGIUM (BE)  
BELIZE (BZ)  
BENIN (BJ)  
BERMUDA (BM)  
BHUTAN (BT)  
BOLIVIA, PLURINATIONAL STATE OF (BO)  
BONAIRE, SINT EUSTATIUS AND SABA (BQ)

### Alert

Select All / Clear All

### High Alert

Select All / Clear All

Move to Pass

Move to Alert

Move to High Alert

Cancel

Submit

# ICS – EM Activity Exceptions

- 4 criteria are examined
- Customizable thresholds
- ‘Always trust Editors’ option supersedes other EM Activity criteria

## Configure EM Activity Exceptions for Identity Confidence Check

The following elements are examined when the Identity Confidence Check evaluates EM Activity. People with activity in these categories are viewed positively in the overall Identity Confidence Score.

Always trust Editors - If a person has an Editor Role or Editor assignment history, s/he will automatically be assessed a 'Pass' overall score and no other factors will be assessed for this person.


1. Person currently has an Editor Role or historical Editor assignments on this publication
2. Person has authored  or more accepted submissions on this publication
3. Person has submitted  or more invited papers on this publication
4. Person has completed  or more reviews on this publication

Cancel

Submit



# ICS – ORCID Activity

- Checks for presence of authenticated ORCID iD in EM  
[0000-0001-5187-2798](#) 
- May add additional ORCID criteria in future

## Configure ORCID Assessment Option for Identity Confidence Check

The Identity Confidence Check views a person with an authenticated ORCID in EM positively and a 'Pass' score is applied towards the Identity Confidence Score.

If the ORCID is not supplied for the person being evaluated, ORCID cannot be assessed and is ignored by the Identity Confidence Check. If a person does not have an authenticated ORCID in EM, you may designate below whether an 'Alert' or 'High Alert' is applied towards the overall score.

- Alert  
 High Alert

Cancel

Submit

# ICS – Editor RoleManager

- New permission: View Identity Confidence Check Results

### Edit Role Definition

**Role Name:\***   
*Maximum Role name is 40 characters.*

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

---

[Expand All](#)   [Collapse All](#)

- New Submissions**
- Editor Assignment**
- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**
- General Searching and Viewing**
- Edit Submission**
- Discussion Forums**
- Transmittal Form**
- Sending E-mail**
- Viewing and Editing People Data**
- Flag Icons**
  - View Submission Flags
  - Turn On Submission Flags
  - Turn Off Submission Flags
  - View Submission Flag History
  - View People Flags
  - Turn On People Flags
  - Turn Off People Flags
  - View Identity Confidence Check Results
  - View Schedule Group Flags
  - Turn On Schedule Group Flags
  - Turn Off Schedule Group Flags

# ICS Discussion

- Do you think this feature looks useful?
- What other criteria might you want to see in future?



passive-  
aggressive  
notes.com

# Detailed People Notes

Currently in EM

# Detailed People Notes - Highlights

- In EM since version 12.1
- Authorized Editors can enter notes about an individual
- Captures historical record of each note entered, who entered it, when it was entered, etc.
- Notes can be shared across publications in a portal-linked (IJRS) journal group
- Individual entries deleted are permanently deleted (across all sites in a portal-linked group)

# Can be entered on Proxy Registration

## Proxy Registration

Please enter key information about the person you are registering.

**User Information** [Open Special Character Palette](#)

Reviewer Role:

Default Login Role:

**Personal Information**

Title:  (Mr., Mrs., Dr., etc.)

First Name \*:

Middle Name:

Last Name \*:

Degree:  (Ph.D., M.D., Jr., etc.)

E-mail Address \*:

If entering more than one e-mail address, use a semi-colon between each address (e.g., joe@thejournal.com;joe@yahoo.com)  
Entering a second e-mail address from a different e-mail provider decreases the chance that SPAM filters will trap e-mails sent to you from online systems. [Read More.](#)

Country \*:

**Detailed People Notes**

Add New Note: [i](#)

Character Count: 0 / 4000

Filter By:

Publication	Operator	Notes	Date	Action
▲▼	▲▼		▲▼	

No Detailed People Notes are available

**Detailed People Notes**

Add New Note: [i](#)

Character Count: 0 / 4000

Filter By:

Publication	Operator	Notes	Date	Action
▲▼	▲▼		▲▼	

No Detailed People Notes are available

# Displayed on Search People – Update Information page

- This example is Editor with permission to View and Edit Detailed People Notes

**Detailed People Notes**

Add New Note: ⓘ

Character Count: 0 / 4000

Submit Note

Filter By: All Publications  
DEMO122  
DEMO141

View/Print All

Publicat	Not	Date	Action
DEMO122	Mary François Smith, PhD Proin tincidunt, eros at luctus maximus, ex ante dignissim diam, sit amet bibendum (more...)	Nov 11 2015 10:43:59:147AM	🗑️
DEMO122	Mary François Smith, PhD Etiam sit amet urna est. Sed et lectus est. Pellentesque ac neque bibendum neque (more...)	Nov 11 2015 10:43:46:760AM	🗑️
DEMO122	Mary François Smith, PhD Maecenas magna elit, suscipit quis mi at, varius dapibus urna. Etiam volutpat (more...)	Nov 11 2015 10:43:38:430AM	🗑️
DEMO122	Mary François Smith, PhD Nullam libero lorem, aliquet a urna et, porta semper magna. Morbi sollicitudin, (more...)	Nov 11 2015 10:43:20:197AM	🗑️

Display this section at the top of this page

# Displayed on Search People – Update Information page

- This example is Editor with permission to View only

**Detailed People Notes**

[View/Print All](#)

Operator ▲▼	Note	Date ▲▼
Twink E. Jonesey, PhD	What do you think about making Ginger our prime contact for our new project?	Aug 19 2014 03:02PM
Mary Jones, PhD	Ginger is usually very fast at reviewing for us	Aug 18 2014 12:12PM
Twink E. Jonesey, PhD	He's currently on about 5 boards	Aug 9 2014 03:06PM
Mary Jones, PhD	He's was out for a year when he had that skiing accident. He was able to review <a href="#">(more...)</a>	Aug 03 2014 03:07PM

Display this section at the top of this page

**People Notes**

A cool cat. Dependable. Reliable. Got nine lives. Knows his local wildlife



# View/Print All Detailed People Notes

### Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Filter By: All Publications  
DEMO122  
DEMO141

Publicat	Note	Date	Action
DEMO122	Mary François Smith, PhD Proin tincidunt, eros at luctus maximus, ex ante dignissim diam, sit amet bibendum <a href="#">(more...)</a>	Nov 11 2015 10:43:59:147AM	
DEMO122	Mary François Smith, PhD Etiam sit amet urna est. Sed et lectus est. Pellentesque ac neque bibendum neque <a href="#">(more...)</a>	Nov 11 2015 10:43:46:	
DEMO122	Mary François Smith, PhD Maecenas magna elit, suscipit quis mi at, varius dapibus urna. Etiam volutpat <a href="#">(more...)</a>	Nov 11 20 10:43:38:	
DEMO122	Mary François Smith, PhD Nullam libero lorem, aliquet a urna et, porta semper magna. Morbi sollicitudin, <a href="#">(more...)</a>	Nov 11 20 10:43:20:	



Display this section at the top of this page

### Detailed People Notes

#### Luciano Vincenzo Lipari, None

Publication	Operator	Note	Date
DEMO122	Mary François Smith, PhD	Proin tincidunt, eros at luctus maximus, ex ante dignissim diam, sit amet bibendum neque dui vitae nunc. Nulla eleifend consequat tincidunt. Sed porta finibus erat, ac ultrices metus vestibulum a. Suspendisse rutrum massa sit amet ligula maximus, eu sollicitudin elit suscipit. Nulla ultricies vulputate auctor. Donec odio tortor, aliquet nec nunc quis, blandit commodo tortor. Sed faucibus ornare nisi, sed euismod lectus. Donec fringilla metus venenatis augue placerat viverra. In sit amet arcu a lacus auctor pellentesque sed vitae velit.  Nullam libero lorem, aliquet a urna et, porta semper magna. Morbi sollicitudin, dolor et convallis egestas, turpis dui iaculis ligula, mattis vulputate velit ex quis erat. Nulla facilisi. Aliquam venenatis, lorem in posuere fringilla, massa dui facilisis leo, id consequat urna lectus eu quam. Morbi faucibus mi leo, non hendrerit odio eleifend interdum. Phasellus auctor placerat elementum. Donec vitae urna eu diam consectetur efficitur. Mauris a laoreet velit. Proin sit amet scelerisque lorem, consectetur imperdiet libero. Donec eu diam nulla. Pellentesque rhoncus convallis est, ac vehicula diam consectetur sed. Aliquam accumsan elit odio. Sed a leo pharetra, posuere libero et, laoreet eros. Ut eleifend, eros quis dapibus fringilla, risus risus egestas eros, et sollicitudin massa dui quis mauris.	Nov 11 2015 10:43:59:147AM
DEMO122	Mary Francois	Etiam sit amet urna est. Sed et lectus est. Pellentesque ac neque bibendum neque efficitur vulputate eget id dolor. Fusce mattis porta felis. at tincidunt nulla lacinia	Nov 11 2015 10:43:46:760AM

# Displayed on People Information Page

**People Information - John E Ross**   

[Summary Statistics](#) [Detailed Statistics](#)

**General Information** [Open Special Character Palette](#)


Permanent Address: (Current Address)	UNITED STATES <a href="mailto:iswatski@ariessc.com">iswatski@ariessc.com</a>
Secondary Information:	
People URLs:	None
Unavailable Dates:	None
Role:	Author, Reviewer

**Detailed People Notes**

Add New Note: 

Character Count: 0 / 4000

Filter By:

Publication	Operator	Note	Date	Action
JERS	Twink E. Jonesey, PhD	Ginger has changed institutions.	Sep 1 2014 03:07PM	
ASC	Mary Jones, PhD	He is up for election to at least 2 more boards.	Aug 18 2014 12:07PM	
JERS	Twink E. Jonesey, PhD	Ginger is on about 6 boards that I know of.	Aug 17 2014 03:06PM	
ASC	Mary Jones, PhD	Do you have any idea how busy Ginger is currently? I had heard that he was going <a href="#">(more...)</a>	Aug 16 2014 03:06PM	
ASC	Mary Jones, PhD	He's had a rough year, what with the other one disappearing for a few <a href="#">(more...)</a>	Aug 19 2014 03:07PM	
JERS	Twink E.	What do you think about making Ginger our prime contact for our new	Aug 18 2014	

# Searchable – Reviewer Search

**Search for Reviewer All Reviewers - Manuscript Number LONDEV151-D-18-00011  
Franklin D. Roosevelt  
Turn-taking in Human Communication--Origins and Implications for Language Processing.**

[Manuscript Details](#) ▾ [Register and Select New Reviewer](#)

## Change Search Type

Search My Publication  ▾ from  ▾

## Search for Reviewers

[Help with Searching](#)

[Insert Special Character](#)

(	Criterion	Is/Is not	Selector	Value	)	
<input type="checkbox"/>	Last Name	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	First Name	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	E-mail Address	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Position	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Department	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Institution	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	City	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	State	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Country	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	People Notes	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Detailed People Notes	is	Begins With	<input type="text"/>	OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	People Flag Name					
<input type="checkbox"/>	Personal Classifications					
<input type="checkbox"/>	Personal Keywords					
<input type="checkbox"/>	Secondary Last Name					
<input type="checkbox"/>	Secondary First Name					

# Displayed in Reviewer Search Results

- Displayed in results for all Reviewer search modes
- Detailed People Notes are read-only for all Editors in Reviewer Search mode
- Collapsed by default

**Reviewer Candidates**

Select a checkbox by each person you wish to select as a Reviewer ([more...](#)).

Page: 1 of 1 (1 total Reviewers) Display 10 results per page.

Select As			Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics							
Inv.	Alt.	Prop.				Reviews in Progress:	Completed Reviews:	Un-assigned After Agreeing:	Terminated After Agreeing:	Date Last Invited:	Outstanding Invitations:	Agreed:	Declined:	Un-invited Before Agreeing:	Terminated:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Ginger Rabelais</a> (Reviewer)	No		0	1	0	0	Aug 15 2014 04:45PM	0	1	0	1	2
			<p><b>This publication:</b>  <span style="color: red;">Reviewer Un-invited (This person reviewed the previous version as Reviewer 1)</span></p>			0	0	0	0		0	0	0	0	0
						Aug 14 2014 04:32PM	Aug 14 2014 04:49PM	-	0						
						50	0.0								

**Detailed People Notes**

Filter By: All Publications View/Print All

Publication	Operator	Notes	Date
ASC	Twink E. Jonesey, PhD	Our prime contact for the new MARS project	Sep 03 2014 03:02PM
ASC	Mary Jones, PhD	He is rather busy this fall 2014	Aug 19 2014 03:06PM
JCTU	Jack Bauer, BB	Currently on 5 Boards	Aug 11 2014 03:06PM
ASC	Mary Jones, PhD	I heard that he may be picked for the ACME Board of Directors, which could divert his time. ( <a href="#">more...</a> )	Aug 03 2014 03:07PM
SPUD	Ed Browdy, JD	He's not happy with XYZ journal, don't send him any articles to review for them	Jul 21 2014 03:07PM
ASC	Twink E. Jonesey, PhD	Ginger has changed institutions.	May 05 2014 03:07PM

**People Notes:**  
Real dependable. Excellent team player. Good for partnering with. Good sense of humor. Reliable.

Page: 1 of 1 (1 total Reviewers) Display 10 results per page.

# Searchable – Search People and Search for Authors

**Search People**

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Last Name	Begins With	<input type="text"/>	ALL
Last Name	Begins With	<input type="text"/>	END
First Name	Begins With	<input type="text"/>	END
Institution	Begins With	<input type="text"/>	
City	Begins With	<input type="text"/>	
State			
Country			
E-mail Address			
Phone Number			
Personal Classifications			
Personal Keywords			
People Notes			
Detailed People Notes			
People Flag Name			
Registration Date			
Proxy Registration			

[Editor Main Menu](#)

**Search for Authors - Manuscript JANETDEV111-D-14-00064  
"Spring Equinox & Vernal Pools"**

[Manuscript Details](#)

[Help with Searching](#)      [Insert Special Character](#)

Criterion	Selector	Value
Last Name	Begins With	<input type="text"/>
Last Name	Begins With	<input type="text"/>
First Name	Begins With	<input type="text"/>
Position	Begins With	<input type="text"/>
Department		
Institution		
City		
State		
Country		
People Notes		
Detailed People Notes		
People Flag Name		

[Author Selection Summary](#)  
[Editor Main Menu](#)

# Primary Use Cases

- Search to find the best suitable Reviewers for the submission
  - Even more useful of portal-linked journals use the same/similar terminology to allow for more thorough search results
- Search to find the most relevant Authors to invite
  
- *How does your journal use Detailed People Notes?*

# Configuration - Editor RoleManager Permissions

- 4 permissions govern access
  - View Detailed People Notes
  - Manage Detailed People Notes
  - View Portal-Shared Detailed People Notes
  - Manage Portal-Shared Detailed People Notes

Viewing and Editing People Data

- Search People
  - Send Username and Password
  - Change ORCID ID
  - Change E-mail Address
  - Change Preferred Method of Contact
  - Change Editor Role Designation to/from : 

ALL EDITOR ROLES

Managing Editor

Editor In Chief

Associate's "Editor"

Guest Editor
- Inactivate Users
- Anonymize Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
  - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs

# Configuration - Share Notes Across Journals

## Share People

- [Define People Sharing Group](#)
- [Define Reviewer Sharing Partners](#)
- [Set Inactivation and Merging Policies](#)
- [View Duplicate E-mail Policies](#)
- [Set Detailed People Notes Sharing Policy](#)
- [Configure Group Notifications](#)

Journals within the same publishing organization can establish cooperative relationships with other journals for the purposes of establishing a single login across all journals in the group. This configuration is performed on the [Sharing Group](#) page.

Once the sharing relationship(s) is confirmed, journals then have the option to share Detailed People Notes with other journals in the group. This configuration is performed on the [Define Reviewer Sharing Partners](#) page. Once Reviewer Data sharing, even if a confirmed people sharing relationship is established, is confirmed, journals can share Detailed People Notes with other journals in the group.

Journals in the group must then agree on a policy for making use of Detailed People Notes. Specifically, journals must determine whether people records made inactive/merged on all the other journals in the group, or vice versa. This configuration is performed on the [Set Inactivation and Merging Policies](#) page.

Journals in the group should agree on a policy for allowing duplicate Detailed People Notes to be shared. Specifically, journals must determine whether changes normally propagate throughout the group, or whether they are set in PolicyManager but the checks carried out for duplicate e-mail addresses are performed on the group. This configuration is performed on the [View Duplicate E-mail Policies](#) page.

Each journal in the group may choose to share Detailed People Notes with other journals in the group. As a result, a subset of journals in the group can share Detailed People Notes, based on whether they have selected to share Detailed People Notes with other journals in the group. This is configured on the [Set Detailed People Notes Sharing Policy](#) page.

The final configuration step for journal groups is to set up notification policies for when a journal is inactive or merged. For journals who decide not to propagate user data to other journals in the group, this configuration is performed in [ActionManager](#). For journals who decide to propagate user data to all journals in the group, this configuration is performed on the [Configure Group Notifications](#) page.

[AdminManager Menu](#)

## Set Detailed People Notes Sharing Policy

To share Detailed People Notes with other journals that have also selected to share Detailed People Notes, click the checkbox for 'Share Detailed People Notes with other journals'. You may select this option at any time. Your journal will synchronize your Detailed People Notes with all the other journals that are sharing notes.

You may deselect this option at any time to stop sharing Detailed People Notes. If you do, your journal will retain all the previously shared Detailed People Notes, but will not share any further changes to Detailed People Notes with other journals from that point on. If you do not wish to retain the notes shared from other journals, you may manually remove them from each user's personal record.

Share Detailed People Notes with other journals

[Cancel](#) [Submit](#)

- [Define People Sharing Group](#)
- [Define Reviewer Sharing Partners](#)
- [Set Inactivation and Merging Policies](#)
- [View Duplicate E-mail Policies](#)
- [Configure Group Notifications](#)
- [AdminManager Menu](#)



# Extend Additional People Details (APDs) Functionality

- Use APDs as Registration Questions
- Conceal APDs from certain Editor roles
- Display APDs on additional pages

*Coming in 16.0 and Subject to Change!*

COMING

SOON!



# Current Functionality: Registration Questions

- Currently, Registration Questions or Statements can appear whenever a new user registers or when an existing user logs into the system.
- Registration Question/Statement responses are a single checkbox, where the user either ticks or does not tick the box
- For GDPR the user is required to tick the box, but other custom questions may be optional or required

### Confirm Registration

Please confirm the following very important information:

Given/First Name: **Jake**  
Family/Last Name: **Meyer**  
Username: **jake**  
E-mail Address: **jake@ariessys.com**  
Country or Region: **UNITED STATES**

Please tick the box below if you would like to receive special offers and promotions that may be of interest to you:

I would like to receive special offers and promotions.

Please click on the privacy policy links below and then check the box. This ensures that you are aware of your personal data privacy protection under the European Union's General Data Protection Regulation (GDPR). See [https://ec.europa.eu/info/law/law-topic/data-protection\\_en](https://ec.europa.eu/info/law/law-topic/data-protection_en)

\* I have read and accept the [Publisher's Data Use Privacy Policy](#) and the [Aries Privacy Policy](#).

If the information is correct and you wish to complete this registration, click the 'Continue' button below.

<< Previous Page    Continue >>

# Current Functionality: APDs

- Only available to Editors via Search People – Update Information page
- Limited use because users cannot supply this information themselves

### Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

Ms. Stacey J Lavelle

Self-Registered: Oct 02 2003 01:53PM  
Last Modified: Apr 10 2018 10:40AM  
Viewed Privacy Policies: Mar 23 2018 11:26AM  
IP Address: 127.0.0.1

Inactivate this User

Send Login Details

\*\*The user will be sent an email with a link to reset their password. The

#### User Information

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role: Author  
Default Login Menu: Production Menu  
Available as a Reviewer? Yes  No   
Board Member? Yes  No   
Forbidden as a Reviewer? Yes  No   
Reviewer Role \*: Reviewer  
Publisher Role \*: None  
Editorial Role \*: None  
Editor Description

Activity Details

Additional People Details

#### Personal Information

Title: Ms. (Mr., Mrs., Dr., etc.)  
Given/First Name \*: Stacey  
Middle Name \*: J  
Family/Last Name \*: Lavelle

### Additional People Details - Stacey J Lavelle, MD

Cancel Save and Close

Hobbies	Running
Birth Date	06/13/1990 x (mm/dd/yyyy)
<b>Reviewer Stats from Legacy System</b>	

Cancel Save and Close

# NEW: Use APDs as Registration Questions!

- Customers want to ask more complex questions during the registration process, and collect more information for new users in general
- This is achieved by enhancing Additional People Details (APD) functionality and integrating it with Custom Registration Questions

**Confirm Registration**

Please confirm the following very important information:

Given/First Name: **Molly**  
Family/Last Name: **Carrol**  
Username: **molly2**  
E-mail Address: **molly@mailinator.com**  
Country or Region: **IRELAND**

This publication emphatically requests that all users check the box to confirm that they like cats.

\* Please confirm that you like cats.

This publication requires all users to confirm that they are not logging in on Saturday. Please check the box to proceed with your task at hand.

\* Today is absolutely, positively not Saturday.

Please click on the privacy policy links below and then check the box. This ensures that you are aware of your personal data privacy protection under the European Union's General Data Protection Regulation (GDPR). See [www.eugdpr.org](http://www.eugdpr.org)

\* I have read and accept the [Publisher's Data User Privacy Policy](#) and the [Aries Privacy Policy](#).

Three required Registration Questions configured using existing functionality

Four optional APD fields configured to appear on the Confirm Registration page, showing Help text configured for two of the APDs, shown on this page as tooltip hover text.

Has freckles? No freckles

Please order a refreshing beverage: A chilled glass of Sauvignon Blanc

What is the value of Pi ( $\pi$ )?

Please select a random date: (mm/dd/yyyy)

Select a refreshing beverage from the drop-down list.

If the information is correct and you wish to complete this registration, click the 'Continue' button below.

<< Previous Page Continue >>

# Displayed on Search People – Update Information

- Shown if configured to display (on Edit Additional People Detail page)
- Response is also editable if configured to be

### Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

**Weledelgeboren Heer Fokke Naaktgeboren-Niemandsvdriet van Zuidewijn** ▾

Proxy-Registered:  
Oct 17, 2017  
(Data Verified by User)

Last Modified:  
May 03, 2018

Viewed Privacy Policies:  
May 03, 2018  
IP Adress: 10.100.31.2

[Inactivate this User](#)

[Send Login Details](#)

\*\*The user will be sent an email with a link to reset their password. The password will not reset until the user clicks that link.

Exclude this user from receiving

[Open Special Character Palette](#)

### User Information

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role: Author ▾

Default Login Menu: Editorial Menu ▾

Available as a Reviewer? Yes  No

Board Member? Yes  No

Forbidden as a Reviewer? Yes  No

Reviewer Role \* Reviewer ▾

Publisher Role \* Publisher ▾

Editorial Role \* Editor That Gets Invited ▾

Editor Description

Has freckles?	A little cinnamon on the nose ▾	<a href="#">i</a>
Likes cats?	Crazy cat lady ▾	<a href="#">i</a>
Age range?	Please select age range ▾	
Please order a refreshing beverage:	Please select a beverage ▾	
What is the value of Pi (π)?	<input type="text"/>	<a href="#">i</a>

[Activity Details](#)

[Additional People Details](#)

# Also Displayed on Update My Information Page

- Required Registration Questions (e.g. GDPR acknowledgment checkbox) remain uneditable
- Optional APD Registration Questions are shown if configured to display (on Edit Additional People Detail page)
- Response is also editable if configured to be

The screenshot displays a user profile update interface. At the top, there is a button labeled "Select Personal Classifications". Below this, the "Personal Keywords" section shows "(None Defined)" and an "Edit Personal Keywords" button. A section titled "Additional Information" contains an "Unavailable Dates" button. Below this, a legend indicates that a checkmark "✓" signifies an affirmative response. Two questions are listed with checkmarks: "Please confirm that you like cats." and "I have read and accept the [Publisher's Data User Privacy Policy](#) and the [Aries Privacy Policy](#)." A red box highlights three more questions: "Please order a refreshing beverage:" with a dropdown menu set to "Please select a beverage"; "What is the value of Pi (π)?" with an empty text input field; and "Please select a random date:" with a date picker set to "04/03/2018" and a format "(mm/dd/yyyy)". Information icons are present next to the beverage and date questions. At the bottom, there are "Cancel" and "Submit" buttons.

# Extended Configuration Options for APDs

### Edit Additional People Detail Field

Cancel Submit

Field Description: [Insert Special Character](#)  
 Likes cats?  
 Maximum 256 characters

Field Type: List [View/Edit Values for Drop-down List](#)

Display this field to all Editor roles

Hide this field from:   
 Managing Editor  
 Editor-in-Chief  
 Editor  
 Associate Editor

**Options**  
 Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional People Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link or icon is displayed on the appropriate page.

Page	Hide	Editable	Required	Help Text
Additional People Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
Search People - Additional Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
People Activity Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

The settings below affect the pages related to a user's own people record. Additional People Detail Fields can be configured for Optional or Required responses at registration (as with Registration Questions) or be Hidden. 'Enforced at Login' requires users to enter a response the first time they log in after the field was added. Responses to Additional People Detail Fields on the Update My Information page may be configured as Hidden, Editable, or Not Editable. These settings affect only the people record owner's view. Editors cannot ever see Additional People Details on another user's Update My Information page in proxy mode.

Page	Options	Help Text
Confirm Registration	Hidden Hidden Optional Required Enforced at Login	
Update My Information	Hidden Hidden Editable Not Editable	

Cancel Submit

Field Description: [Insert Special Character](#)  
 Likes cats?  
 Maximum 256 characters

Field Type: List [View/Edit Values for Drop-down List](#)

**Options**  
 Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional People Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link or icon is displayed on the appropriate page.

Page	Hide	Editable	Required	Help Text
Additional People Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
Search People - Additional Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
People Activity Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

The settings below affect the pages related to a user's own people record. Additional People Detail Fields can be configured for Optional or Required responses at registration (as with Registration Questions) or be Hidden. 'Enforced at Login' requires users to enter a response the first time they log in after the field was added. Responses to Additional People Detail Fields on the Update My Information page may be configured as Hidden, Editable, or Not Editable. These settings affect only the people record owner's view. Editors cannot ever see Additional People Details on another user's Update My Information page in proxy mode.

Page	Options	Help Text
Confirm Registration	Hidden Hidden Optional Required Enforced at Login	
Update My Information	Hidden Hidden Editable Not Editable	



# Recap

- Deep functionality to help you:
  - Be confident that an Author or Reviewer is who they say they are, and reduce the chance of a fraudulent submission or review
  - Maintain and share across journals a complete history of detailed people notes about a user to help guide their involvement with your publication going forward
  - Present users with questions at registration to capture and store useful, relevant, nuanced information from them that can be modified and kept up to date





**Thank you  
for listening**

