

EEMUG 2020



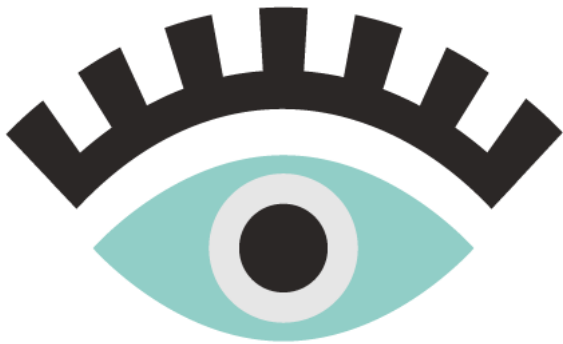
#EEMUG2020





Identity Confidence Check & People Record Management

keep it legit



Sebastian Atay
Account Coordinator
satay@ariessys.com

#EEMUG2020



Identity Confidence Check (ICC)



Identity Confidence Check (ICC)

- That individuals are who they say they are is fundamental to the operation of peer review.
- How can we tell that authors & reviewers are legitimate?





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
Action Links	Drought in the Office	Harry Henderson	May 25 2018 3:20PM	May 25 2018 3:20PM	Submitted to Journal	
Action Links	Mookie Betts is on Fire	Grover Alexander	May 23 2018 3:12PM	May 23 2018 3:12PM	Submitted to Journal	
Action Links	Google Duplex: AI Appointment Maker	Franklin D. Roosevelt M.D.	May 23 2018 1:26PM	May 23 2018 1:26PM	Submitted to Journal	

EM can help.



ICC - How does it work?

Scorecard based on metadata:

- Email address
- Institution/Organization
- Country/Region
- EM Activity
- ORCID Activity



ICC – When does it happen?

- 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



ICC - Details and Search Submissions

Details for Manuscript Number: JBJS-D-03-00988R1 "My Super Important Research Article"

[Cancel](#)
[Save](#)
[Save and Close](#)









[Manuscript Notes](#)
[Production Notes](#)
[Editors](#)
[Reviewers](#)
[Alternate Reviewers](#)
[Additional Information](#)
[Author\(s\) Invited to Submit Commentary](#)

Discussion Forum:	Initiate Discussion
Additional Manuscript Details:	Add/Edit Additional Manuscript Details
Corresponding Author:	Michael Pinzur  , Loyola University Medicine, Maywood, IL UNITED STATES [Proxy]
Corresponding Author E-Mail:	slavelle@ariessc.com
Author Comments:	
Other Authors:	Marco A Guedes   Matthew Saltzman   Fabio Batista   Frank A Gottschalk   Dainius Juknelis   Author Status

Search Submissions - Search Results

Article Title is containing 'super'

Page: 1 of 1 (6 total submissions) 1

Action	Manuscript Number	Article Type	Current Status	Article Title	Status Date	Initial Date Submitted	Author Name	Reviewers	History
View Submission Details    Initiate Discussion History File Inventory Edit Submission Solicit Commentary Classifications View Reviews and Comments Unassign Editor Notify Editor Invite Reviewers Set Final Disposition	JBJS-D-03-00988R1	Clinical	Under Review	My Super Important Research Article	Feb 9 2016 2:05PM	May 12 2003 10:16AM	Michael Pinzur 	Michael J. Bosse, M.D.  John H. Bowker, M.D.  Douglas G. Smith, M.D.  John H. Bowker, M.D. * 	




ICC - 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.		View Author Details View Questionnaire Responses

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 Edit	0000-0002-1920-2660			Courtauld Institute of Art	Yes May 23 2018 2:05 PM	Reset Confirmation Status View Author Details
3	Joan Bissell 	R0	lhildreth@ariessc.com Edit				Oxford Brookes University	No Response	Resend Letter View Author Details

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](#)




ICC - 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](#)







ICC – Editor can run check 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">View Submission Details ▾Initiate Discussion HistoryTechnical CheckFile InventoryEdit SubmissionSend Back to AuthorRemove Submission ClassificationsSet Final DispositionInitiate ProductionSimilar Articles in MEDLINESend E-mailLinked Submissions		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.

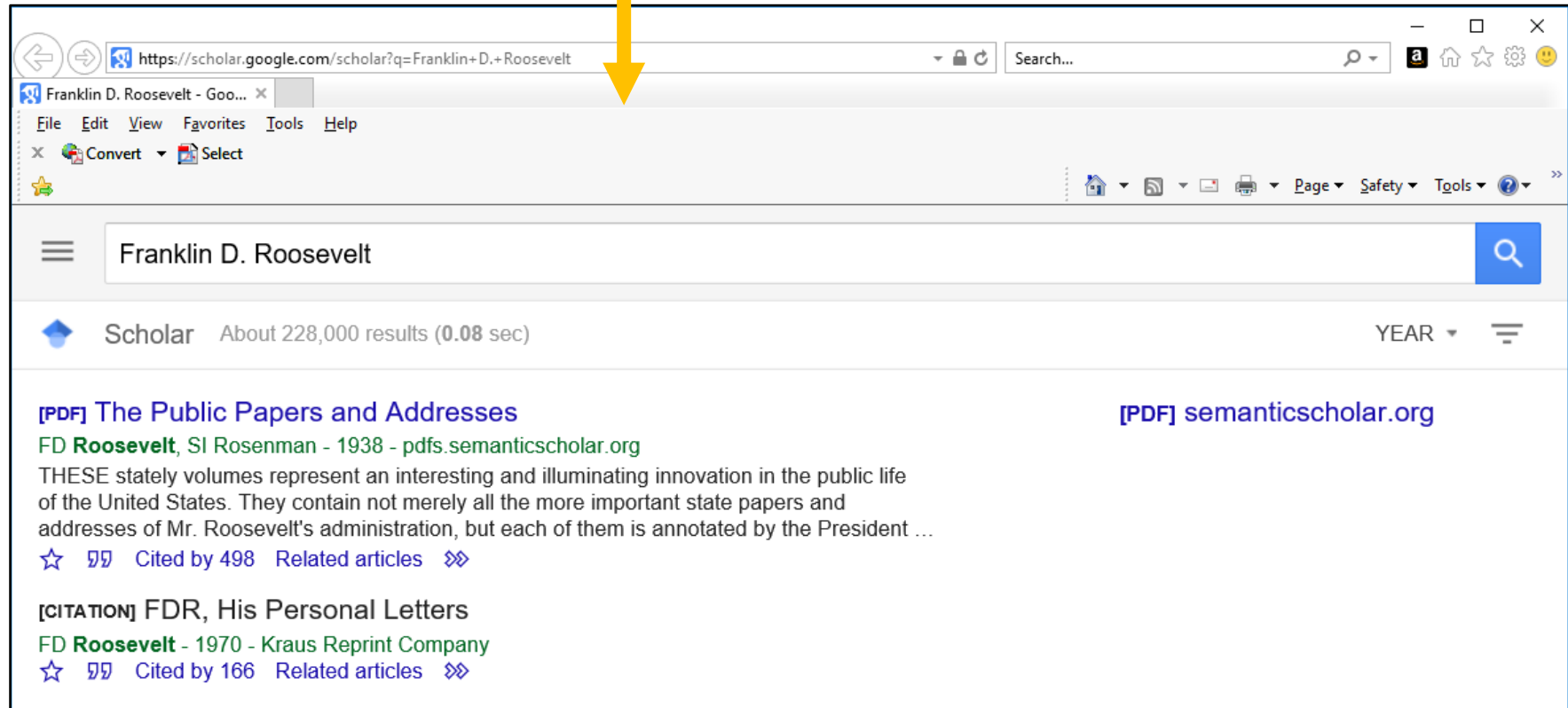
[Search Google Scholar](#)

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

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">View Submission DetailsInitiate Discussion HistoryTechnical CheckFile InventoryEdit SubmissionSend Back to AuthorRemove SubmissionClassificationsSet Final DispositionInitiate ProductionSimilar Articles in MEDLINESend E-mailLinked Submissions		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.



Overall rating is 'Pass'

Michael Pizella, MD



[Search Google Scholar](#)

Institution

? Loyola University Medical Center

Country/Region

✓ UNITED STATES

EM Activity

✓
This person has authored 1 accepted submissions to this publication
This person has completed 3 reviews for this publication

Recalculate Now

Override and Trust this Person



People Activity Details

Close




Last run: 01/02/2019 11:20:45



Overall rating 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 and Trust this Person](#) [People Activity Details](#) [Close](#)

Last run: 01/02/2019 11:20:45



ICC Override

Quicklinks

New Submissions - Mary Mary, PhD, MD

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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"> Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions 								
<ul style="list-style-type: none"> View Submission Details ▾ Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions 		Original Study-All 4 Payment Methods		Google Duplex: AI Appointment Maker	Franklin D. Roosevelt M.D.	May 23 2018 1:26PM	May 23 2018 1:26PM	Submitted to Journal
<ul style="list-style-type: none"> View Submission Details ▾ Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Similar Articles in MEDLINE 		Rapid Communication		okie Betts is Fire	Grover Alexander	May 23 2018 3:12PM	May 23 2018 3:12PM	Submitted to Journal



EAR and Custom Reporting

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 Auth	<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 Auth	<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 Auth	<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 Auth	<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 Submitt	<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



EAR and Custom Reporting

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 %); Frank Page (42.86 %); Andy Inhatko (87.50 %); Rene Richards (100.00 %)	Big Bird	Bird	89	False		5/23/2018
Buffy Anne Summers, PhD()	Buffy	Summers				6/1/2018
Daniel Baumgart (61.54 %)	Daniel	Baumgart	62		LONDEV 61-D-18-00014	6/1/2018
Daniel Baumgart (61.54 %); Ilja Wende(); Ulrike Grittner()	Daniel	Baumgart	62		LONDEV 61-D-18-00013	6/1/2018
Franklin D. Roosevelt, M.D. (100.00 %); Harold M. Stevens()	Franklin	Roosevelt	100		LONDEV 61-D-18-00008	5/30/2018
Franklin D. Roosevelt, M.D. (100.00 %); Helen Smith()	Franklin	Roosevelt	100		LONDEV 61-D-18-00007	5/30/2018
Franklin D. Roosevelt, M.D. (100.00 %); J L Bendict()	Franklin	Roosevelt	100		LONDEV 61-D-18-00010	5/30/2018
Franklin D. Roosevelt, M.D. (100.00 %); Kevin McGann()	Franklin	Roosevelt	100		LONDEV 61-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		LONDEV 61-D-18-00012	6/1/2018
Franklin D. Roosevelt, M.D. (100.00 %); S C Levinson()	Franklin	Roosevelt	100		LONDEV 61-D-18-00011	5/30/2018
Franklin D. Roosevelt, M.D.()	Franklin	Roosevelt			LONDEV 61-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		LONDEV 61-D-18-00006	5/22/2018
Harry Anthony Alves (100.00 %); Samantha Thurmond (37.50 %); Glenda Jackson (37.50 %)	Harry	Alves	100		LONDEV 61-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		LONDEV 61-D-18-00005	5/22/2018
Harry Henderson (11.11 %); Samantha Thurmond(); Ronald Myer (25.00 %)	Harry	Henderson	11			5/25/2018



ICC – Configuration

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](#)



ICC 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. The Identity Confidence Check is run when:

- A new submission is received by the publication
- A revised submission is received by the publication
- Co-Author verification is carried out
- Co-Author metadata is changed
- An EM user with a score updates their personal information

This is informational to Editors only, and does not impede the editorial workflow in any way.

You can customize the Identity Confidence Check by adjusting each Factor's Level of Importance. You can also exclude one or more Factors from the calculation, or exclude a particular party (Corresponding Author, Co-Authors and/or Suggested Reviewers) using the appropriate checkboxes. Click the 'Configure' link to learn more about the logic behind each Factor and how to refine the parameters to suit your publication's needs. In order to include Email Domain and Country/Region in the Identity Confidence Check, you must configure at least one exception to be evaluated. Once you have adjusted the parameters, select the 'Enable Identity Confidence Check' checkbox to activate the feature. ([less...](#))

Enable Identity Confidence Check

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



Email Domain Exceptions

- Pass/Alert/High Alert
- Domains not listed are ignored
- Can use wildcards

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



ICC – Institution Exceptions

- INN must be enabled
- 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



ICC – Institution Name Normalization

Enable Institution Name Normalization

When this feature is enabled, users will be presented with a list of affiliations to choose from wherever Institution and Department are entered in the system. This includes Registration, Proxy Registration, Update My Information, Alternate Contact Information, Search People - Update Information, and Add/Edit Authors (manuscript submission step).

By activating this option you acknowledge that you and your users will be using and contributing to a normalized and crowd-sourced institutional and department name database that belongs to Aries and its licensors.

Enable Institution Name Normalization

Cancel

Submit

Institution	Cornel
Department	Cornell University
E-mail	Cornell University College of Veterinary Medicine Cornell University New York State Agricultural Experiment Station
Reason	Weill Cornell Graduate School of Medical Sciences Weill Cornell Medical College in Qatar Cornerstone University Cornell College Joan and Sanford I Weill Medical College of Cornell University Cornell University Samuel Curtis Johnson Graduate School of Management Cornell University Law School

PolicyManager>General Policies>Institution Name Normalization



ICC – Institution Exceptions

- INN must be enabled
- 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](#).

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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



ICC – Country/Region Exceptions

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	Alert	High Alert
Select All / Clear All	Select All / Clear All	Select All / Clear All
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 (bo) BOSNIA AND HERZEGOVINA (ba) BOTSWANA (bw) BOUVET ISLAND (bv) BRAZIL (br) BRITISH INDIAN OCEAN TERRITORY (io) BRUNEI DARUSSALAM (bn) BULGARIA (bg) BURKINA FASO (bf)		
<div style="border: 2px solid yellow; padding: 5px; display: flex; justify-content: center; gap: 10px;">Move to Pass Move to Alert Move to High Alert Cancel Submit</div>		

ik

aluated for the
ry is not

ttion. On a PC,
d items in the



ICC – 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



ICC – ORCID Activity

- Checks for presence of authenticated ORCID iD in EM
- 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

0000-0001-5187-2798 



ICC – 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








ICC Summary



People Management



People Management - Overview

- Detailed People Notes
- People Flags 
- Other Identifiers:    
 - People URLs
 - Privacy Policy Acknowledgement
 - ORCID (& other IDs)
- Additional People Details (APDs) Functionality
- Batch Editor Reassignment

COMING
SOON!



Detailed People Notes



People Notes vs. Detailed People Notes

People Notes

Hey! You! Yes, you! If you're reading this, I've been trapped in the people notes field somehow, I *know* this sounds weird, but it's true. Please, you have to help me, I don't think Seb's noticed that I started typing out this message but I'm going to have to delete it before they return. Oh god, I think that's the

Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Submit Note

View/Print All

Operator ▲ ▼	Note	Date ▲ ▼	Action
mary mary	EMUG test note	18 Jun 2019	

Display this section at the top of this page



Detailed People Notes - Highlights

- Authorized Editors
- Historical record
- Can be shared across publications
- Permanent deletion



Add Notes at 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: Reviewer

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: ⓘ

Character Count: 0 / 4000

Filter By:

Publication	Operator	Notes	Date	Action
▲▼	▲▼		▲▼	
No Detailed People Notes are available				

Detailed People Notes

Add New Note: ⓘ

Character Count: 0 / 4000

Filter By:

Publication	Operator	Notes	Date	Action
▲▼	▲▼		▲▼	
No Detailed People Notes are available				



Search People – Update Information

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.

Mickey Mouse

Proxy-Registered:
Apr 27, 2017
(Data Unconfirmed by User)

Last Modified:
Dec 07, 2018


Viewed Privacy Policies:
(has not viewed them yet)

Inactivate this User


Send Login Details




**The user will be sent an email with

Detailed People Notes [Open Special Character Palette](#)

Add New Note: 

Character Count: 0 / 4000 Submit Note

Filter By: **All Publications** 
UKACTEST1

Publication	Note	Date	Action
UKACTEST2	Melanie Cotterell	Cute smile	Dec 07, 2018 
UKACTEST2	Melanie Cotterell	Really good hearing!	Dec 07, 2018 
UKACTEST1	Melanie Cotterell	A great little dude	Dec 07, 2018 

View/Print All

Display this section at the top of this page



Search People – Update Information

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 (more...)	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	Operator	Note	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

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.	Nov 11 2015 10:43:59:147AM
		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.	
DEMO122	Mary François Smith, PhD	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 eget. Etiam eu enim libero. Fusce congue metus sit amet viverra vehicula. Vestibulum dolor dui, sagittis nec feugiat et, gravida vitae sapien. Morbi mattis metus quis elementum suscipit. Aenean a lectus in erat pharetra convallis eu at libero. Etiam volutpat turpis justo, quis porttitor felis elementum vitae. Quisque porttitor pharetra metus eu accumsan. Mauris sed nisl vitae odio auctor porttitor. Sed sed nibh pharetra, egestas leo eget, consectetur felis. Proin id placerat nisl. Pellentesque sit amet egestas ex.	Nov 11 2015 10:43:46:760AM



People Information Page

People Information - John E Ross

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

General Information [Open Special Character Palette](#)

Permanent Address: (Current Address)	UNITED STATES jswatski@ariessc.com
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	<input type="button" value="Delete"/>
ASC	Mary Jones, PhD	He is up for election to at least 2 more boards.	Aug 18 2014 12:07PM	<input type="button" value="Delete"/>
JERS	Twink E. Jonesey, PhD	Ginger is on about 6 boards that I know of.	Aug 17 2014 03:06PM	<input type="button" value="Delete"/>
ASC	Mary Jones, PhD	Do you have any idea how busy Ginger is currently? I had heard that he was going (more...)	Aug 16 2014 03:06PM	<input type="button" value="Delete"/>
ASC	Mary Jones, PhD	He's had a rough year, what with the other one disappearing for a few (more...)	Aug 19 2014 03:07PM	<input type="button" value="Delete"/>
JERS	Twink E.	What do you think about making Ginger our prime contact for our new	Aug 19 2014	<input type="button" value="Delete"/>



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 Search for Reviewers ▾ from All Reviewers ▾

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"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	Last Name	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	First Name	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	E-mail Address	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	Position	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	Department	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	Institution	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	City	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	State	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	Country	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	People Notes	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	OR ▾ <input type="button" value="Remove"/>
<input type="checkbox"/>	Detailed People Notes	is ▾	Begins With ▾	<input type="text"/>	<input type="checkbox"/>	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
- Read-only for all Editors in Reviewer Search mode
- Collapsed by default

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.	Asn.	Alt.	Prop.				Reviews in Progress:	Completed:	Un-assigned After Agreeing:	Terminated After Agreeing:	Last Review Agreed:	Portal Wide:	Last Review Completed:	Portal Wide:	Last Review Declined:	Portal Wide:	Avg Days Outstanding:	Manuscript Rating:	Avg Review Rating:	Date Last Invited:	Portal Wide:	Outstanding Invitations:	Agreed:	Declined:	Un-invited Before Agreeing:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mickey Mouse (Reviewer)	No		0	0	0	0	-	-	-	-	0	0	0.0	Dec 07, 2018	-	1	0	0	0	0	1

[Detailed People Notes](#)

Filter By: All Publications View/Print A...

Publication	Operator	Note	Date
UKACTEST1	Melanie Cotterell	Great sense of humour	Dec 07, 2018
UKACTEST2	Melanie Cotterell	Cute smile	Dec 07, 2018
UKACTEST2	Melanie Cotterell	Really good hearing!	Dec 07, 2018
UKACTEST1	Melanie Cotterell	A great little dude	Dec 07, 2018

(* indicates match between Reviewer and Manuscript Classifications)



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		ALL
Last Name	Begins With		END
First Name	Begins With		END
Institution	Begins With		
City	Begins With		
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 UKACTEST1-D-18-00004
"Ice tea isn't a real thing and coffee always smells better than it tastes."

[Manuscript Details](#) [Register and Invite New Author](#)

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

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



Configuration

5 permissions

- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- Detailed people Notes (for reviewer searching)

Reviewer Search Criterion:

- People Notes
- Detailed People Notes
- Personal Classifications
- Personal Keywords

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



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 is configured on the [Define Reviewer Sharing Partners](#) page. For Reviewer Data sharing, even if a confirmed people sharing relationship is established, you must also configure the [Reviewer Data](#) sharing.

Journals in the group must then agree on a policy for making use of 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 e-mail addresses to be used, as such changes normally propagate throughout 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 the [Set Detailed People Notes Sharing Policy](#) option.

The final configuration step for journal groups is to set up notification preferences for inactive or merged. For journals who decide not to propagate use of people records to other journals in the group, this configuration is performed in [ActionManager](#). For journals who decide to propagate use of people records to all journals in the group, this configuration is performed in [ActionManager](#).

[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](#)



People Flags







People Flags

- Permission driven
- Editor/Publisher only
- Huge palette
- Customizable description shows on hover
- Display in most folders
- Criteria in Search People/Invite Reviewer/Invite Author

- View People Flags
- Turn On People Flags
- Turn Off People Flags

- Create Customized Submission Flags
- Create Customized People Flags

Domino S
Cotterell 

(ESTONIA)

Loves tea

Ice tea isn't a real thing and coffee always smells better than it tastes.

Search People

Choose the criterion for selecting People Records.


[Help with Searching](#) [Register New User](#)


Criterion	Selector		User Role	
People Flag Name	Is Equal To	Preferred Reviewer Always has co-authors Never answers phone Never missed a deadline Can always be bribed with a free book Loves tea	ALL	END
Last Name	Begins With			END



Creating Customized People Flags

Create Customized People Flags

People Flags can be attached to people records on the People Flags page (accessible from the 'People Information' and 'Search People - Update Information' page), or by clicking on the flag icon on any page where a People Flag is displayed. Users with permission to 'Turn On People Flags' can also set flags by clicking the 'Set Flag' icon . When a flag is displayed for a person, it is visible to Editors and Publishers with appropriate RoleManager permission.

Order	Flag	Flag Name	
<input type="text" value="1"/>		Great Reviewer	Remove

[Add](#)

[Update Item Order](#)


[Add](#)

[Back to PolicyManager](#)

Add Customized People Flag

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

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On People Flags' and 'Turn Off People Flags' can display/turn off People Flags for any person on the People Flags page. When a flag is attached to a people record, it will be displayed next to the person's name on many pages throughout the system (Editor and Publisher Roles must have permission to 'View People Flags').

Flag Icon: 

[Open Special Character Palette](#)

Flag Name: Maximum 256 characters

Associated with Custom Question? No



PolicyManager>General Policies>Create Customized People Flags



Adding Flags to People Records

<input type="checkbox"/>	Dianne Author <small>KF</small>	P		ANGUILLA	[Author]
<input type="checkbox"/>	Bob Becker <small>KF</small>	P	Set Flags	UNITED STATES	[Author]
<input type="checkbox"/>	bob becker <small>KF</small>	P		UNITED STATES	[Author]

SET PEOPLE FLAGS

Display	Flag	Flag Name
<input type="checkbox"/>	😊	Great Reviewer
<input checked="" type="checkbox"/>	#	EMUG

<input type="checkbox"/>	Dianne Author <small>KF</small>	P #		ANGUILLA	[Author]
<input type="checkbox"/>	Bob Becker <small>KF</small>	P		UNITED STATES	[Author]
<input type="checkbox"/>	bob becker <small>KF</small>	P		UNITED STATES	[Author]



Other Identifiers



People URLs

- View People URLs
- Edit People URLs

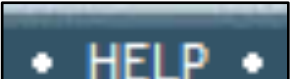
- Permission controlled in Role Manager
- Visible on user record through Search People
- Social media, Faculty/Company webpages, Professional networks

People URLs	<input type="text" value="https://melanieonlinkedin.com"/>
	<input type="text" value="https://melanieontwitter.com"/>
	<input type="text" value="https://melanienotonfacebook.com"/>
<p>Note: You must enter the complete URL (i.e. http://www.target_site.com)</p>	



Privacy Policy Acknowledgement

Since GDPR came into force in May 2018, we have:

- Added a link to your privacy policy/journal overview page to the login box
- All users are required to acknowledge both policies
- We record the date, time and IP Address in use when the question is answered, this can be seen on User records through Search People
- Other GDPR-changes can be found by searching for GDPR in 

Software Copyright © 2018 Aries Systems Corporation.
[Aries Privacy Policy](#) | [Publisher's Data Use Privacy Policy](#)

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

Melanie Cotterell    

Proxy-Registered:
May 15, 2018
(Data Verified by User)


Last Modified:
Oct 04, 2018

Viewed Privacy Policies:
Aug 03, 2018
IP Address: 10.100.31.21



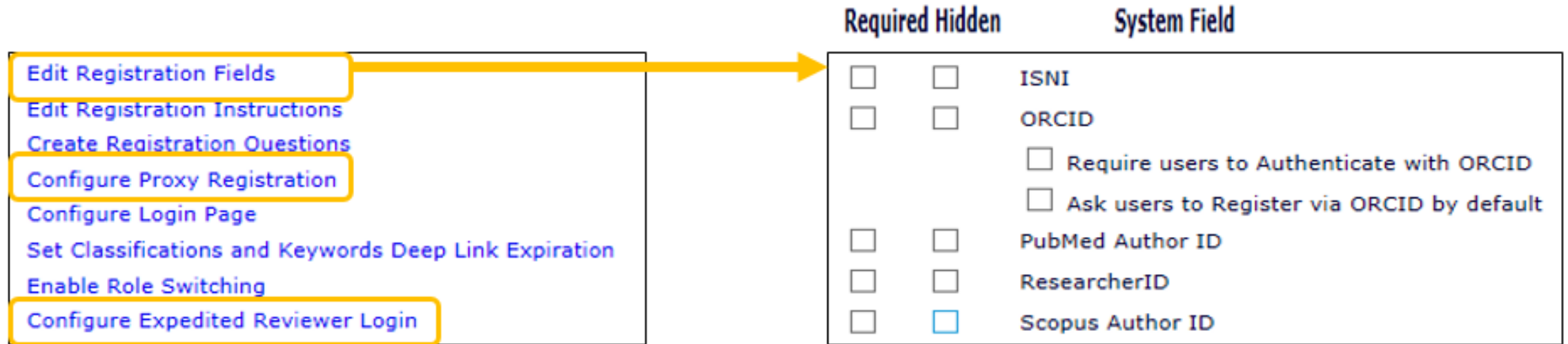
ORCID & Other Personal IDs

- ISNI, PubMed Author ID, ResearcherID, Scopus Author ID
 - Optional/Required Registration field
 - Update My Information
 - Text Entry
- ORCID – further integration
 - Authentication
 - SSO login
 - Requirement for Submission
 - Reviewer Peer Review Deposit

ISNI	<input type="text"/>	
ORCID	0000-0001-8555-7964 	Delete
PubMed Author ID	<input type="text"/>	
ResearcherID	<input type="text"/>	
Scopus Author ID	<input type="text"/>	



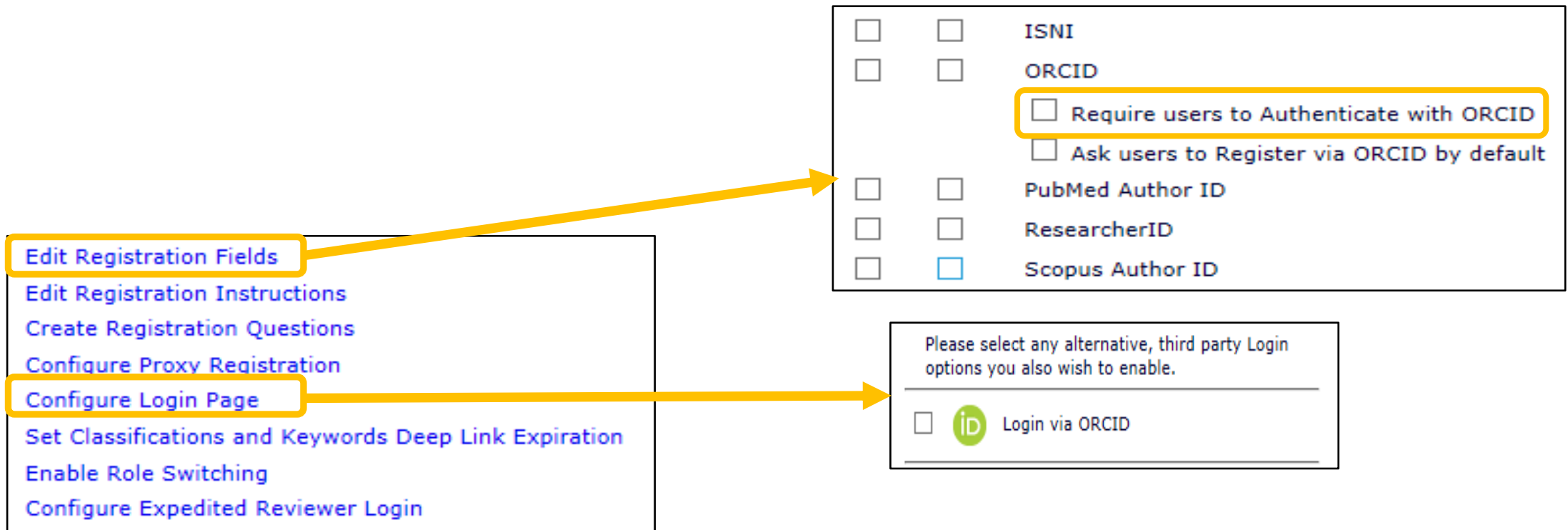
ORCID & Other Personal IDs



PolicyManager>Registration and Login Policies



ORCID - Authentication & SSO



PolicyManager>Registration and Login Policies



ORCID - Co-Authors & Submission


- Requirement for Submission
- Collect for Co-Authors
- **New!** Separate ID request @ Revision

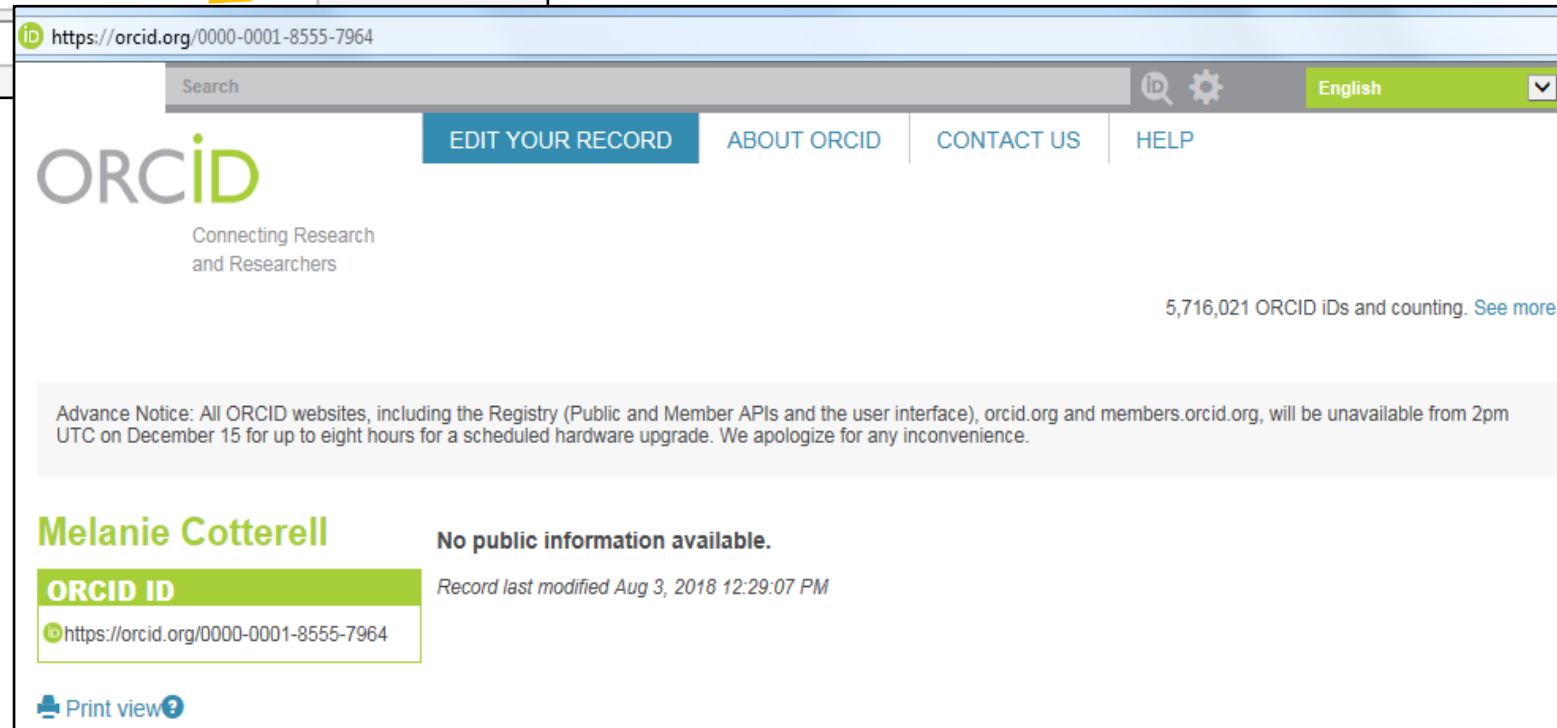
Authenticated ORCID ID Request:	<input type="radio"/> Hidden <input checked="" type="radio"/> Optional <input type="radio"/> Required
Co-Author Parameters	
Register/Verify Other Authors	
<input type="text" value="Co-Authors register and verify on new submission"/>	
Set "ISNI" Text Entry Box Preference:	<input type="radio"/> Optional
Set "ORCID" Text Entry Box Preference:	<input checked="" type="radio"/> Optional <input type="radio"/> Required <input type="radio"/> Hidden
Set "PubMed Author ID" Text Entry Box Preference:	
Set "ResearcherID" Text Entry Box Preference:	<input type="radio"/> Optional
Set "Scopus Author ID" Text Entry Box Preference:	<input type="radio"/> Optional

PolicyManager>Submission Policies>Edit Article Types>Edit






ORCID – Authenticated ORCID link

ISNI	<input type="text"/>
ORCID	0000-0001-8555-7964  Delete
PubMed Author ID	<input type="text"/>
ResearcherID	<input type="text"/>
Scopus Author ID	<input type="text"/>



id <https://orcid.org/0000-0001-8555-7964>

Search   English 

ORCID
Connecting Research and Researchers


[EDIT YOUR RECORD](#) [ABOUT ORCID](#) [CONTACT US](#) [HELP](#)



5,716,021 ORCID iDs and counting. [See more.](#)

Advance Notice: All ORCID websites, including the Registry (Public and Member APIs and the user interface), orcid.org and members.orcid.org, will be unavailable from 2pm UTC on December 15 for up to eight hours for a scheduled hardware upgrade. We apologize for any inconvenience.

Melanie Cotterell **No public information available.**

ORCID ID *Record last modified Aug 3, 2018 12:29:07 PM*

 <https://orcid.org/0000-0001-8555-7964>

 [Print view](#) 



Additional People Details (APDs)



Additional People Details (APDs)

- APDs as Registration Questions
- Conceal APDs
- Enhanced Display of APDs



APDs: then

- 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 [Open Special Character Palette](#)

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)
Reviewer Stats from Legacy System	

Cancel Save and Close



Registration Questions: then

- Registration Questions appear when a new user registers or an existing user logs into the system.
- Registration Question 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

* 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 >>](#)



APDs & Registration Questions: now

- APDs & Registration Questions: Combined!
- More complex questions & answers now possible

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

* 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 (π)?		
Please select a random date:		

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

<< Previous Page Continue >>



Search People – Update Information

- Shown if configured to display
- Response can be configured to be editable

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-Niemandsverdriet 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:

Default Login Menu:

Available as a Reviewer? Yes No

Board Member? Yes No

Forbidden as a Reviewer? Yes No

Reviewer Role *:

Publisher Role *:

Editorial Role *:

Editor Description:

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

[Activity Details](#)

[Additional People Details](#)



Update My Information

- Required Registration Questions (e.g. GDPR acknowledgment checkbox) remain uneditable

Otherwise:

- Shown if configured to display
- Response can be configured to be editable

Select Personal Classifications

Personal Keywords (None Defined)

Edit Personal Keywords

Additional Information

Unavailable Dates

indicates affirmative response

<input checked="" type="checkbox"/>	Please confirm that you like cats.
<input checked="" type="checkbox"/>	I have read and accept the Publisher's Data User Privacy Policy and the Aries Privacy Policy .

Please order a refreshing beverage:	Please select a beverage <input type="text"/>	i
What is the value of Pi (π)?	<input type="text"/>	
Please select a random date:	04/03/2018 <input type="text"/> (mm/dd/yyyy)	i

Cancel Submit



Extended Configuration Options for APDs

Edit Additional People Detail Field

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 Role/Manager 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	

- APDs can be hidden from certain roles
- Direct display on Search People – Update Information page saves time
- Hidden, Optional or Forced at Registration



Batch Editor Reassignment



Batch Editor Reassignment

- Easily transfer submissions *en masse* from outgoing editor to new editor
- New letter family & merge field

Coming in 16.1 and Subject to Change!



Batch Editor Reassignment

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:

Default Login Menu:

Available as a Reviewer? Yes No

Board Member? Yes No

Forbidden as a Reviewer? Yes No

Reviewer Role *:

Publisher Role *:

Editorial Role *:

Editor Description:

Transfer Editor Assignments

[Activity Details](#)
[Correspondence History](#)
[Additional People Details](#)

Cancel Proceed

Page: 1 of 1 (5 total submissions) 1

Select	Submission	Manuscript Number	Author Name	Article Title	Section Category	Current Status
<input checked="" type="checkbox"/>	View Submission Details & History	19-00026	Ariadne Author	Full Title (required) optional secondary		With Editor
<input checked="" type="checkbox"/>	View Submission Details & History	19-00029	R. U. Researcher	An Article for July: Study in Summer		With Editor
<input type="checkbox"/>	View Submission Details & History	SAMDEV160-D-19-00030	Michael Mountain	Heights: Observations from Far Above		With Editor
<input type="checkbox"/>	View Submission Details & History	SAMDEV160-D-19-00031	Benjamin Boat	A Rather Long Title with Very Little Actual Meaning		Editor Invited

Select New Editor

Current Editor	Unassignment Letter	Do Not Send
Flora Fade-Away Guest Editor	Batch Editor Unassignment Customize	<input type="checkbox"/>

New Editor	Assignment Letter	Do Not Send
Lois Lane	Batch Editor Reassignment Customize	<input type="checkbox"/>



People Management - Summary



