

Welcome to the 17th Annual
EMUG BOSTON

#EMUG2019



EMUG 2019

ORCiD Feature Update

SJ MacRae

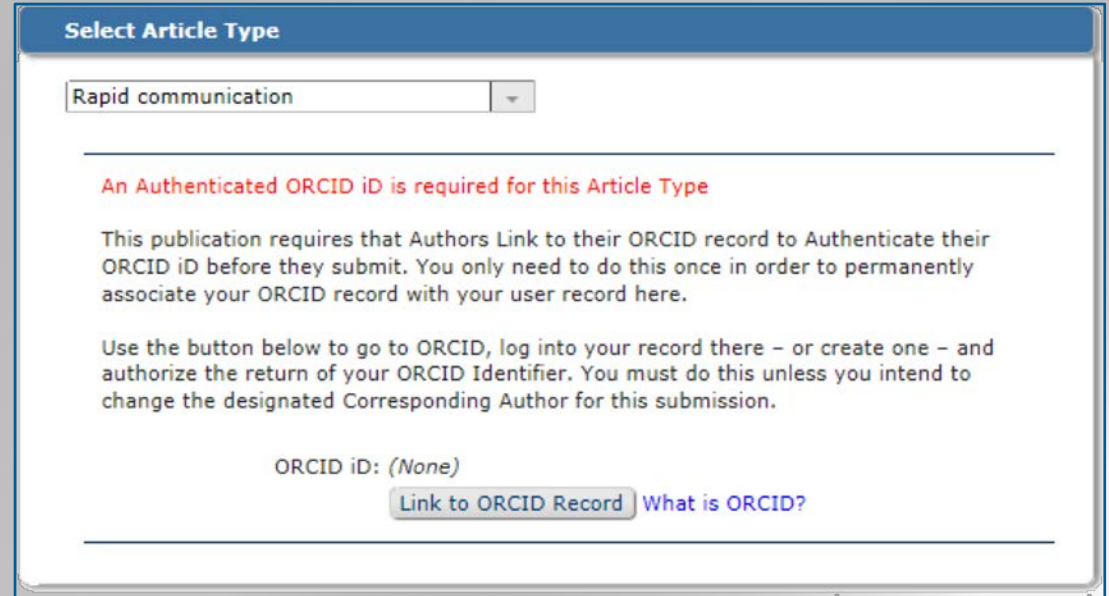
Senior Business Systems Analyst
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Latest enhancements

All quiet on the Western Front...?

Corresponding Author ORCID Request

- Needed improvement to better handle policy change by journal
- Some authors caught out on revision by new ‘Required’ setting
 - Not asked on initial submission.
 - So a retrospective change in policy
- So now a two-part configuration
 - Allowing you to only Require ORCID iDs for new submissions
 - Also useful for keeping initial submission simple



Select Article Type

Rapid communication

An Authenticated ORCID iD is required for this Article Type

This publication requires that Authors Link to their ORCID record to Authenticate their ORCID iD before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

Use the button below to go to ORCID, log into your record there – or create one – and authorize the return of your ORCID Identifier. You must do this unless you intend to change the designated Corresponding Author for this submission.

ORCID iD: (None)

[Link to ORCID Record](#) [What is ORCID?](#)

Existing setting modified

Edit Article Type

Article Type:
Maximum Article Type name is 75 characters.
Warning: changing the Article Type name will apply the name change to all submissions of this type, including manuscripts/submissions.

Family: Regular **Editor Use Only**

	New Submission	Revised Submission
Authenticated ORCID iD Request:	<input type="text" value="Required"/>	<input type="text" value="Required"/>

Authors must suggest a minimum of Reviewers when submitting their manuscripts.

Co-Author Parameters

Register/Verify Other Authors

Authenticated ORCID iD Request: This asks the author to retrieve their ORCID using a secure Authentication mechanism during Co-Author Verification.

Display Author Questionnaire to Co-Authors

- Still configured by Article Type
- Corresponding Author Setting has changed
- Now two settings for initial submission versus revisions
- Co-Author setting unchanged
- This is dependent on Co-Author Verification
- That already takes Initial/Revised submission into consideration

New Configuration option for Review Deposit

- Because of EUGDPR, ORCID deposit needed to be explicit opt-in
- Initially we used a simple 'Assume No' model
- Now enhanced to also allow a 'Please choose' model


Default Response for New Reviewers

Use this option to control the default response to the ORCID Reviewer Credit question for reviewers who have not already completed a review on the site. Reviewers will be able to change the default response to this question for their reviews.

- Set to "No" by default (review will not be deposited unless reviewer changes response to "Yes")
- Set to "Please Select" by default (reviewer will be required to select "Yes" or "No")

ORCID Reviewer Credit

[Instructions]

Your ORCID id: 0000 

* Do we have your consent to update your ORCID Record's Review Activity (subject to publication policy) to show that you completed a Review for this publication? This might trigger a one-time Authorization interaction with ORCID on proceeding.

Please Select Yes No Make this my default selection on applicable future Review forms (you will be able to change this choice).

Behind-the-scenes: ORCID Sandbox Access

- In the past, Customer sites always pointed to primary ORCID site
 - Aries developer environment always pointed to ORCID Sandbox
- Testing ORCID iD retrieval had to use real ORCID iDs
 - Not a problem for most users.
- Reviewer Activity Update posed a problem to beta-testers
 - Can't update a real ORCID Profile with junk data
- We can now point 'production' sites at ORCID Sandbox
 - BUT only for beta sites or implementing sites, where data is cleared out
 - Can't mix fake and real access

Recent Developments

In case you missed them...



ORCID APIs

v2.0 API (current)

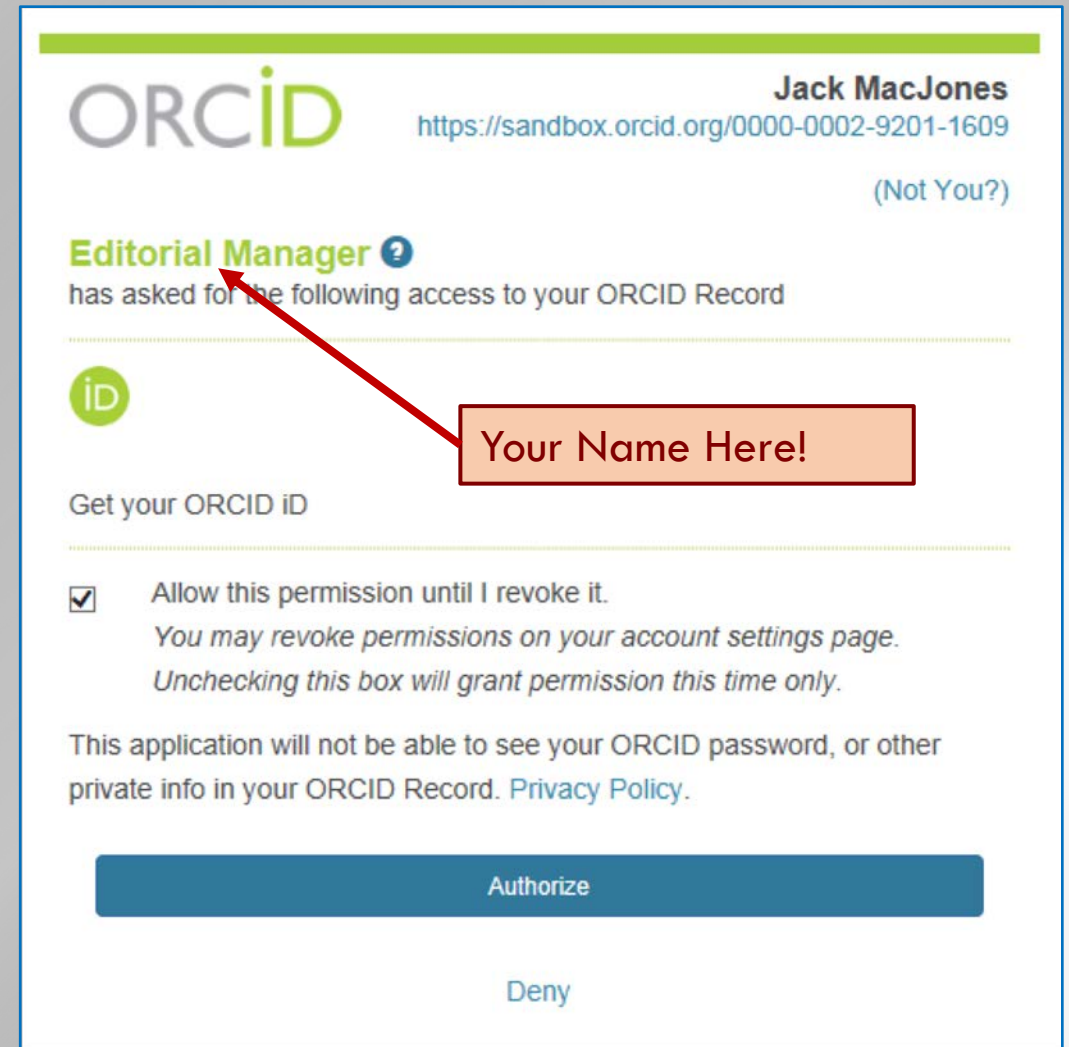
- We transitioned during 15.0
 - Mostly behind-the-scenes
- Allows Peer Review Deposit
 - Beginning to see take-up of this
- 'Customer Credentials' added
 - Needed for Peer-Review Deposit

V3.0 API (in development)

- We will transition in time
- Currently evaluating
 - No obvious, big new feature for us
- Enhanced Affiliations
 - Might affect EM's 'Register via ORCID' feature
 - New: qualifications, invited/honorary positions, Membership and service

Custom Client Credentials

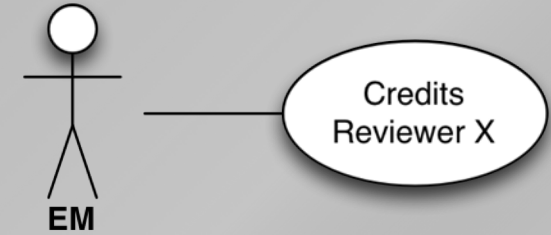
- EM is a registered ORCID Client
 - Users were asked to give ‘Editorial Manager’ permission to read their ORCID iD.
- Since 15.0, journals can be configured with e.g. Publisher Client credentials
 - User will then be asked to give the *Publisher* permission to access
- ‘Member API’ features will need this (e.g. Review Deposit)
 - May allow updates ‘downstream’



Custom Client Credentials

- Will become more important
- Can currently only be set up by Aries Administrators
- Publishers/societies must have registered their own Client Application with ORCID to obtain 'Member API' credentials
 - These are sent to Aries Client Services outside of EM
 - Publishers must register EM URLs as valid for their client application
 - For security; ORCID will only send users back to pre-registered URLs
- Contact your publisher or Aries Client Services
- Required for updating your reviewers' Peer Review activities at ORCID
 - We have improved the ability to test via the ORCID Sandbox

Reviewer Activity Deposit



- V2.0 of the ORCID API added Review Activity records

Only client applications like EM can add any to an ORCID profile

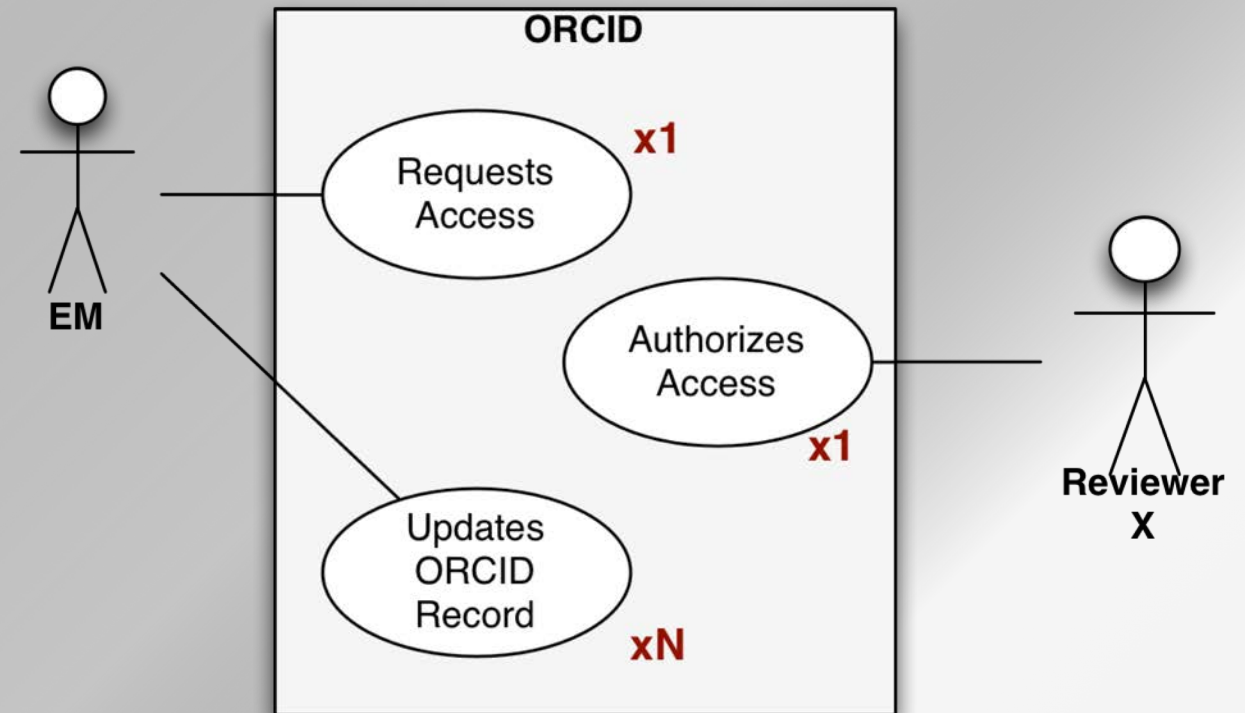
The screenshot shows an ORCID profile section for 'Peer Review (1)'. It highlights a review activity for 'Nature Neuroscience(4)'. A yellow box labeled 'Review Group = Journal' points to the journal name. Below the journal name is a table with columns: Review date, Type, Role, and Actions. The table contains one row for the year 2005, with 'review' as the type and 'reviewer' as the role. Below the table, the text 'Convening organization: Nature Publishing Group (London, United Kingdom)' is shown. A yellow box labeled 'Convening Organization = Publisher' points to this text.

Review date	Type	Role	Actions
2005	review	reviewer	hide details view

Review identifier(s): SOURCE-WORK-ID: NPG-Neuro-230497826
Convening organization: Nature Publishing Group (London, United Kingdom)

Review Credit Process


- We'll ask Reviewers 'OK to send?' when they submit each review
 - Informed consent each time
- One time, this will trigger an Authorization request
 - Gives us persistent permission to update their ORCID Record
- We'll send regular batches of completed reviews to ORCID
 - Can disguise actual dates



Reviewer Experience: Authorization question on Review Form

- Review forms can include an authorization question to deposit to ORCID
- Reviewer is effectively making *this* review eligible for deposit
- This triggers a *one-time* ORCID Authorization *the first time* a particular Reviewer says 'Yes'
- In this example, the Reviewer already has an authenticated ORCID iD in EM

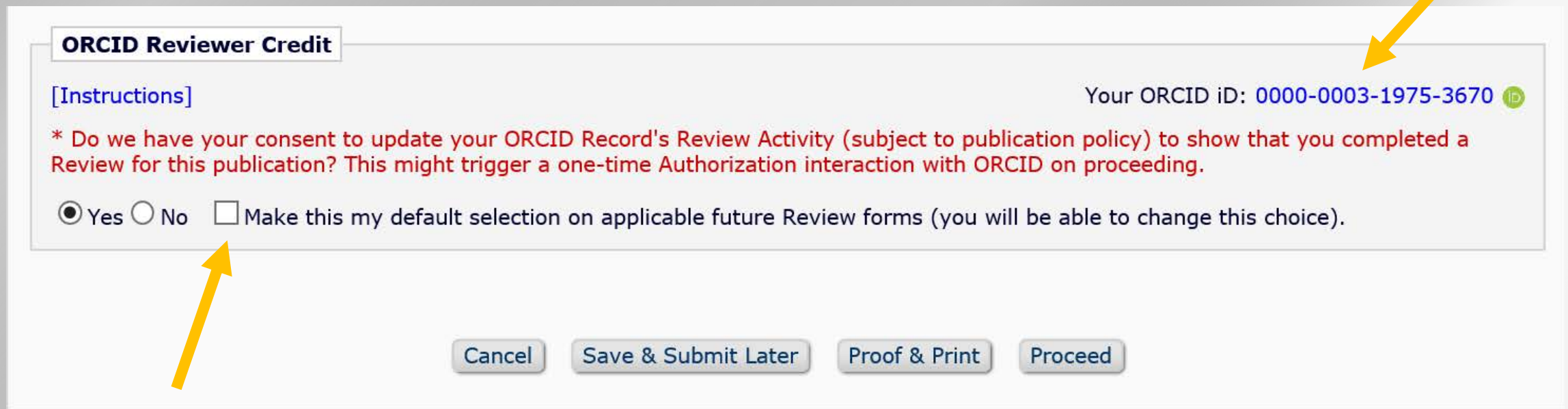
ORCID Reviewer Credit

[\[Instructions\]](#) Your ORCID iD: 0000-0003-1975-3670 

** Do we have your consent to update your ORCID Record's Review Activity (subject to publication policy) to show that you completed a Review for this publication? This might trigger a one-time Authorization interaction with ORCID on proceeding.*

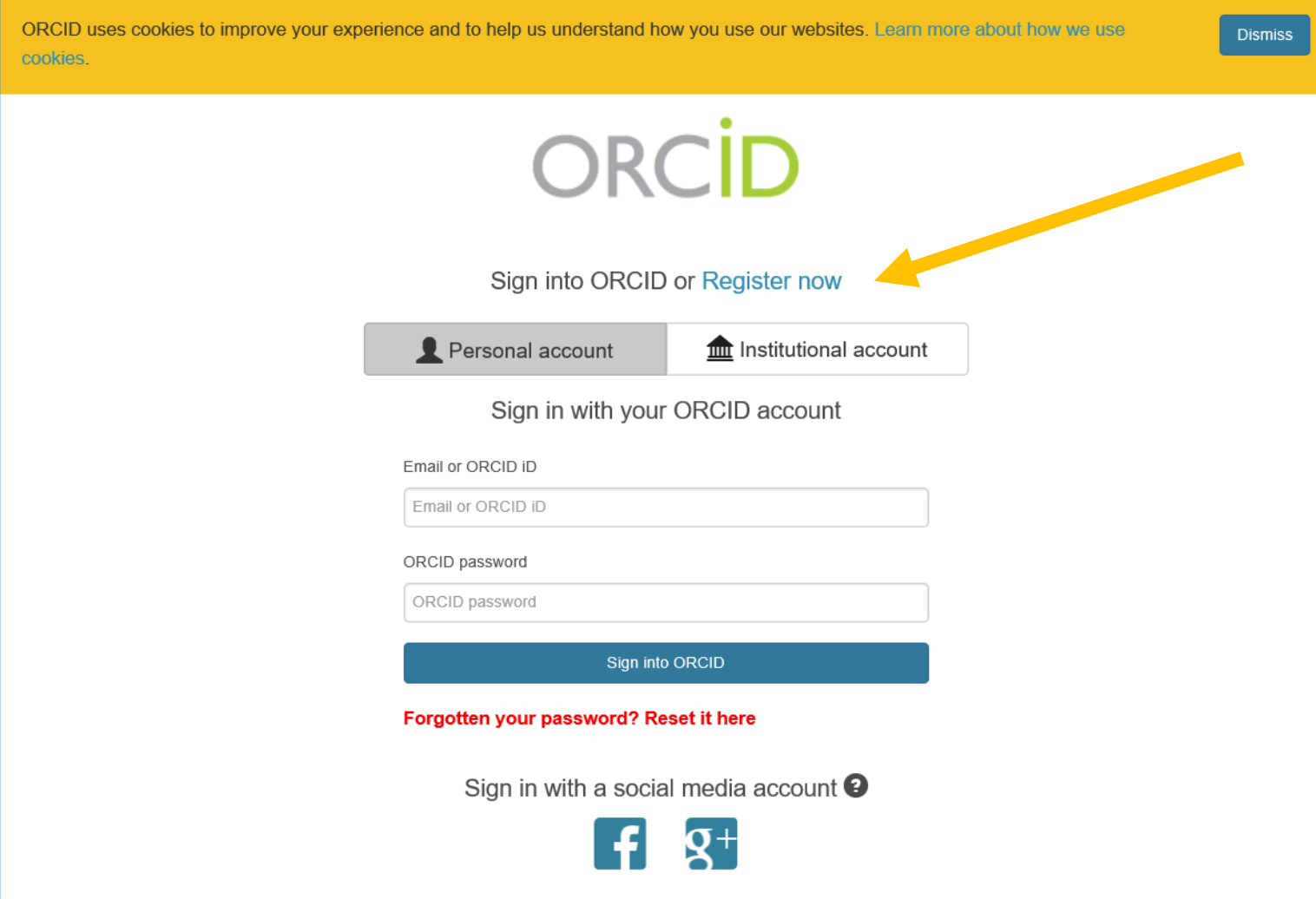
Yes No Make this my default selection on applicable future Review forms (you will be able to change this choice).

[Cancel](#) [Save & Submit Later](#) [Proof & Print](#) [Proceed](#)



Reviewer Experience: Authorize EM to deposit on their behalf

- User is navigated seamlessly to the ORCID website where she can login or register for an ORCID iD



ORCID uses cookies to improve your experience and to help us understand how you use our websites. [Learn more about how we use cookies.](#) [Dismiss](#)

ORCID

Sign into ORCID or [Register now](#)

Personal account Institutional account

Sign in with your ORCID account

Email or ORCID ID

ORCID password

[Sign into ORCID](#)

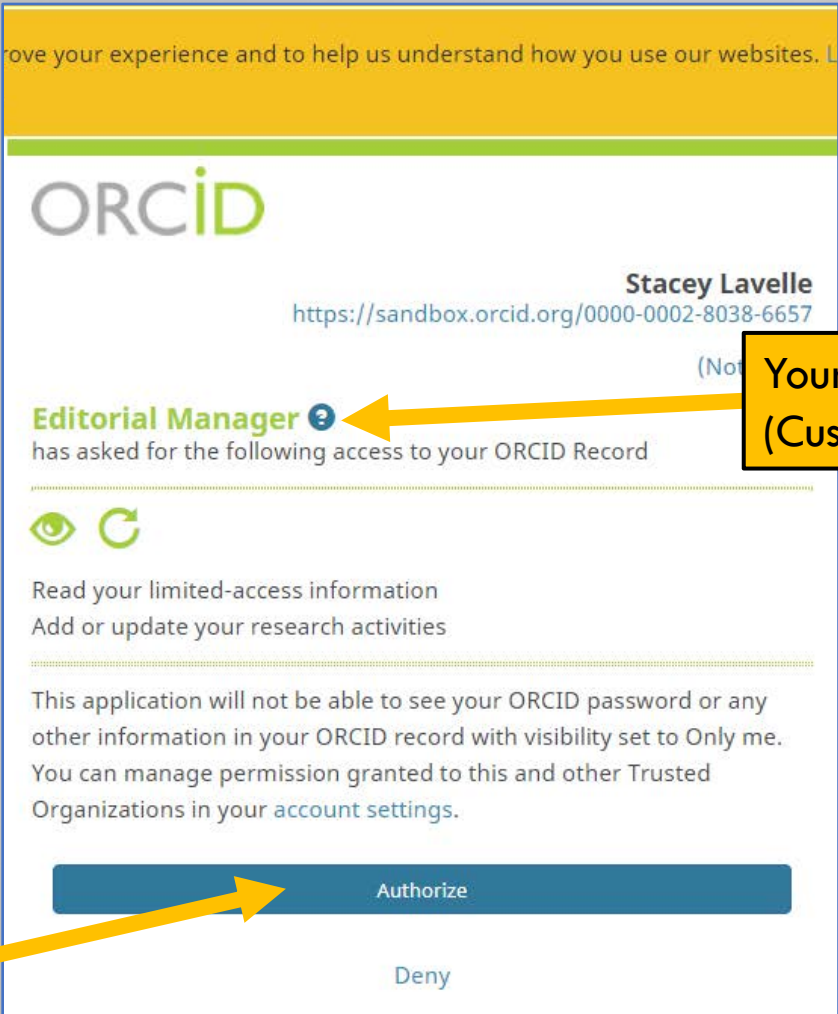
[Forgotten your password? Reset it here](#)

Sign in with a social media account [?](#)

[f](#) [g+](#)

Reviewer Experience: Authorize (once only)

- Standard ORCID interaction
- This requests user permission to update their activities
- They only need to do this one time
- We obtain a persistent token from ORCID to go back and update any time in the future



The screenshot shows an ORCID authorization page. At the top, there is a yellow banner with the text "Improve your experience and to help us understand how you use our websites. L". Below this is the ORCID logo. The user's name, "Stacey Lavelle", and their ORCID iD, "https://sandbox.orcid.org/0000-0002-8038-6657", are displayed. A yellow callout box with the text "Your Name Here! (Custom Credentials!)" has a yellow arrow pointing to the name "Stacey Lavelle". Below the name, it says "Editorial Manager" with a question mark icon, and "has asked for the following access to your ORCID Record". There are two icons: an eye and a refresh symbol. The permissions listed are "Read your limited-access information" and "Add or update your research activities". A paragraph of text states: "This application will not be able to see your ORCID password or any other information in your ORCID record with visibility set to Only me. You can manage permission granted to this and other Trusted Organizations in your account settings." At the bottom, there are two buttons: "Authorize" and "Deny". A yellow arrow points to the "Authorize" button.

Reviewer Experience: Final steps

- User taken seamlessly back to EM to finish submitting review

Reviewer Recommendation and Comments for Manuscript Number STACEYDEV150-D-18-00006

EMUG 2018 is the place to be!

Original Submission
Stacey J Lavelle, MD **Reviewer 1**

[Back](#) [Edit Review](#) [Print](#) [Submit Review to Editorial Office](#)

Recommendation: B **Overall Manuscript Rating (1 - 100):**

Custom Review Question(s)	Response
Are you seeking CME credit?	No
Please describe any flaws in the experiment design.	jsdckfsdjfsdfs
Stacey Testing HTML Formatting in Review Question Click here for a list of our letters: Addendum2	sdsdfsdfsdfs
Question with List Response	
New Question to test Auto-Expanding Textarea	
Question with Yes/No/Text to see auto-expand textarea	

Reviewer Blind Comments to Author:
text for comments to author...

Manuscript Rating Question(s):	Scale	Rating
Originality	[1-5]	3
Writing Style	[1-3]	2
Experiment Design	[1-10]	2

[Back](#) [Edit Review](#) [Print](#) [Submit Review to Editorial Office](#)

Authorization cannot be granted in proxy mode

- If an Editor is proxying on behalf of the Reviewer, he or she is not able to change the Yes/No response

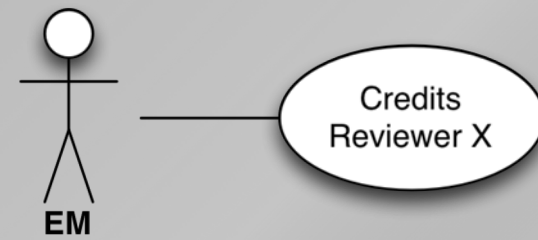
Proxying for Stacey J Lavelle, MD - Reviewer To exit proxy mode, click 'Logout'.

N/A	1	2	3	4	5	6	7	8	9	10

ORCID Reviewer Credit

Note: This reviewer's default response is 'No' so this Review will not be sent to ORCID; you cannot change this as you are proxied in for this person. The Reviewer may change this after you submit the review, by going to their Completed Reviewer Assignments folder and using the 'ORCID Deposit Authorization' action link. They must log in to do so - you cannot do that by proxy.

Enabling ORCiD Review Deposit



- Custom ORCID API Credentials are necessary
- Aries needs to configure ‘Review Group’ and ‘Convening Organization’ details, before Review Deposit can be enabled
 - i.e. ‘Review Group’ = Journal
 - ‘Convening Organization’ = Publisher
- Review Groups *MUST* be pre-registered with ORCID. We can retrieve details, e.g. by ISSN, if your publisher has done so
 - Aries can also register a Review Group if necessary
- ‘Convening Organization’ Details are metadata sent each time
- Contact Aries Client Services to enable and configure

Configuration: Enabling Review Deposit

- Create/Edit Review Form
 - *Customize authorization question on Review Form*
 - *Customize instructions*
 - *Specify what is sent to ORCID*
- Configure ORCID Review Deposit
 - *Specify what receives credit*
 - *Deposit schedule*
 - *Additional criteria*
- Match Review Forms to Article Types and Reviewer Roles

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**

- Manuscript Rating Question Configuration**
 - [Edit Manuscript Rating Questions](#)
 - [Overall Manuscript Rating Question Settings](#)
 - [Edit Manuscript Rating Instructions](#)
- Reviewer Recommendation Policies**
 - [Edit Reviewer Recommendation Terms](#)
 - [Create/Edit Custom Review Questions](#)
 - [Create/Edit Review Forms](#)
 - [Match Review Forms to Article Types and Reviewer Roles](#)
 - [Set Pending Assignments Deep Link Expiration](#)
 - [Configure ORCID Review Deposit](#)
 - [Set Reviewer Recommendation Deep Link Expiration](#)



Configuration: Create/Edit Review Form

Enable ORCID Review Deposit (Display Authorization Request)

[Edit Questions](#)

Authorization Request Question

Do we have your consent to update your ORCID Record's Review Activity (subject to publication policy) to show that you completed a Review for this publication? This might trigger a one-time Authorization

Edit ORCID Review Deposit Authorization Question

You may edit the text of the question presented to Reviewers where they can Authorize the transfer of their Review to their ORCID Record. You must retain the general meaning of the question.

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

[Edit Instructions](#)

Edit Instructions for ORCID Review Deposit

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

Insert Special Character

If you give permission, this publication may update your ORCID record to credit you with a new Reviewer Activity. This will transfer information identifying the publication/organization that you carried out the review for, plus an indication of the date of the review. This will take place some time in the future, subject to publication policy. ORCID will normally email you when your profile is updated in this way.

[View Default Instructions](#)

[Revert to Default Instructions](#)

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

Configuration: Configure ORCID Review Deposit

Configure ORCID Review Deposit

Use this page to define which Reviews should be included in each batch of deposits with ORCID and to define the frequency of the deposits.

For a Review to be eligible, you must first configure the applicable Review Form with the ORCID Review Deposit section enabled. Completed Reviews for which the Reviewer has responded "Yes" to the Authorization Request Question are eligible for deposit, subject to any additional conditions you define below. There are configurable instructions associated with the question that allow you to inform Reviewers of your ORCID Review Deposit policies.

You may also treat all individual Reviews carried out by a specific Person on the same submission as a single review by choosing to deposit only the first eligible Review per submission.

Revision Review Policy

Use this option to control whether you credit each Reviewer with a single ORCID Review Activity citation per Submission (no matter how many different Revisions they Review), or credit each Reviewer with one ORCID Review Activity citation for each eligible, individual Reviewer Assignment they complete (i.e., one Reviewer Activity credited per Revision reviewed including the original submission).

- Credit Reviewers with one ORCID Review Activity per Submission (the first eligible Review to be completed)
- Credit Reviewers with a separate ORCID Review Activity for each eligible individual Review submitted to the publication

Batch Review Deposit

Choose the frequency of transfer for batches of Reviews to ORCID. Each batch will pick up all Reviews for which the Reviewer answered "Yes" to the ORCID Review Deposit Authorization question and which have not yet been deposited, subject to any further conditions defined below.

- Daily
- Weekly, every
- Monthly on the First Last day of the month
- Every months, commencing (mm/dd/yyyy)

Choose when eligible Reviews should be considered ready to deposit: in the batch following their completion or in the batch after the associated submission reaches a specific milestone. If you configure a Rating condition below, Reviews will not be deposited before an Editor assigns a Review Rating.

- Deposit eligible Reviews in the batch following their completion, or the assigning of a Review Rating (if applicable).
- Deposit eligible Reviews after the Author is Notified of a Decision on the version that was reviewed (Initial Submission or any Revision)
- Deposit eligible Reviews after the Final Disposition has been set for the Submission

Cancel

Submit

Configuration: Configure ORCID Review Deposit

- Credit 1 review per submission, or all assignments (across revisions)

Revision Review Policy

Use this option to control whether you credit each Reviewer with a single ORCID Review Activity citation per Submission (no matter how many different Revisions they Review), or credit each Reviewer with one ORCID Review Activity citation for each eligible, individual Reviewer Assignment they complete (i.e., one Reviewer Activity credited per Revision reviewed including the original submission).

- Credit Reviewers with one ORCID Review Activity per Submission (the first eligible Review to be completed)
- Credit Reviewers with a separate ORCID Review Activity for each eligible individual Review submitted to the publication

Configuration: Deposit Schedule

- Deposit daily, weekly, monthly or every N months
- Defer deposit until after Author has been notified or Final Disposition set
- Deposits made in EM nightly batch; i.e. not the moment the criteria is met but later that night

Batch Review Deposit

Choose the frequency of transfer for batches of Reviews to ORCID. Each batch will pick up all Reviews for which the Reviewer answered "Yes" to the ORCID Review Deposit Authorization question and which have not yet been deposited, subject to any further conditions defined below.

- Daily
- Weekly, every
- Monthly on the First Last day of the month
- Every months, commencing (mm/dd/yyyy)

Choose when eligible Reviews should be considered ready to deposit: in the batch following their completion or in the batch after the associated submission reaches a specific milestone. If you configure a Rating condition below, Reviews will not be deposited before an Editor assigns a Review Rating.

- Deposit eligible Reviews in the batch following their completion, or the assigning of a Review Rating (if applicable).
- Deposit eligible Reviews after the Author is Notified of a Decision on the version that was reviewed (Initial Submission or any Revision)
- Deposit eligible Reviews after the Final Disposition has been set for the Submission

Configuration: Match Reviewer Roles to Article Types

- Make sure the correct Review Forms are matched with the desired Article Types

Review Form and Manuscript Rating Configuration

In the grid below, please specify the Review Form to use for each Article Type / Reviewer Role combination. Checking "Use Manuscript Rating Questions" turns on Manuscript Rating Questions for Reviewers of the specified Article Types. Use the "Select" link to choose which Manuscript Rating Questions to use for the associated Article Type and Reviewer Role.

Reviewer Role	Reviewer	Biostat Reviewer	Special Reviewer
Article Type			
Clinical	New: <input type="text" value="Default Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions Select <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Stacey's New Review Form"/> <input type="button" value="v"/>	New: <input type="text" value="Test form for Biostat Reviewers"/> <input type="button" value="v"/> <input type="checkbox"/> Use Manuscript Rating Questions Select <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Test form for Biostat Reviewers"/> <input type="button" value="v"/>	New: <input type="text" value="Stacey's New Review Form"/> <input type="button" value="v"/> <input type="checkbox"/> Use Manuscript Rating Questions Select <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>
Research	New: <input type="text" value="Stacey's New Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions Select <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Stacey's New Review Form"/> <input type="button" value="v"/>	New: <input type="text" value="Default Review Form"/> <input type="button" value="v"/> <input type="checkbox"/> Use Manuscript Rating Questions Select <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>	New: <input type="text" value="Stacey's New Review Form"/> <input type="button" value="v"/> <input type="checkbox"/> Use Manuscript Rating Questions Select <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>

What next?

You tell us!



What to improve? Your feedback guides us

- Where can we make improvements?
 - Your feedback is vital to us
- We now collect ORCID iDs in most important UI flows
 - Registration
 - MS Submission
 - Review Submission
 - Co-Author verification
 - Anywhere else?
- Special ORCID-enabled Functionality
 - Link ORCID to public Profiles
 - ORCID SSO
 - Register via ORCID
 - Review deposit
- Any other possibilities?
 - ORCID acts as independent verifier of identity
 - Where else could we use this?

Top Tips

Our current recommendations



Recap: Current Recommendations

- Collect ORCID iDs
- Collect *ONLY Authenticated* ORCID iDs
- Reconfigure; remove options for collecting non-Authenticated ORCID iDs
- Enable:
 - Registration fields (only)
 - Author and Co-Author validation
 - Reviewer Deposit
 - ORCID SSO (Authors, Reviewers)
- Allows:
 - ORCID Registration (Authors)
 - De-Duplication (Editors, Authors)
 - ORCID drill-down (Editors)
 - Automatic ORCID Record Update (Authors, Reviewers)

Current Best Practices

- Enable ORCID registration fields
 - Optional or Required for Registration? Depends on your users
 - Automatically allows registration via ORCID
- Collect ORCID iDs on Submission and Co-Author Verification
 - Make mandatory for submission if that is publisher policy
- Remove option for user to type in their ORCID iD
 - You want 'Authenticated' ORCID iDs
- Enable ORCID SSO to encourage take-up
- Add merge field to standard letters.
 - Ask users to supply their ORCID iDs if they see link instead of an ORCID iD
- **Do NOT enable ORCID iDs for Proxy-Registration by Editor**
 - Maybe Expedited Reviewer Login
- **Do NOT enable as Other Author fields**
 - Use Co-Author Verification instead
- **Restrict 'Can Edit ORCID iD' permission**
 - To Admins, for 'deceased author' case

Any Questions?

- Fin -



Recommendation: Author & Co-Author ORCID

The screenshot shows a configuration form with the following sections:

- Article Type:** Rapid communication. Includes a warning: "Warning: changing the Article Type name will apply the name change to all submissions of this type, including manuscripts/submissions."
- Family:** Regular. **Editor Use Only:** (checkbox)
- Hide:** (checkbox) When you Hide an Article Type, the Article Type will be deactivated (not available for new manuscripts).
- Send Author/Editor PDF at First Revision:** (checkbox)
- Author Parameters:**
 - Number of days Author has to Revise Submission: 93 (First Revision), 62 (Subsequent Revisions)
 - Authenticated ORCID iD Request: Required (dropdown menu)
 - Authors must suggest a minimum of 0 Reviewers when submitting their manuscripts.
- Co-Author Parameters:**
 - Register/Verify Other Authors:** Corresponding Author only (dropdown menu)
 - Authenticated ORCID iD Request: Optional (dropdown menu)

Red arrows point from the text in the list on the right to the "Required" dropdown in the Author Parameters section and the "Optional" dropdown in the Co-Author Parameters section.

- Configured by Article Type for both:
 - Corresponding Author on submission
 - Co-Authors when they Verify
- Only seen if needed
 - i.e. missing Authenticated ORCID
- Can be *Required* for Submission
 - Good option is to make mandatory for submission instead of registration
- Co-author verification ORCID request only optional
 - Use Co-Author Status to confirm

Corr. Author Verification

New Submission

Select Article Type

Enter Title

Please Select an Article Type

Choose the article type of your manuscript from the pull-down menu. Please check the 'instructions for authors' for guidance.

Choose Article Type: Rapid communication

This publication requests that Authors Link to their ORCID record to Authenticate their ORCID ID before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

Use the button below to go to ORCID, log into your record there – or create one – and authorize the return of your ORCID Identifier.

ORCID ID: (None)


Link to ORCID Record What is ORCID?

Next

Corresponding Author can be asked for ORCID ID during submission process if they don't have one


This publication requests that Authors Link to their ORCID record to Authenticate their ORCID ID before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

Use the button below to go to ORCID, log into your record there – or create one – and authorize the return of your ORCID Identifier.

ORCID ID: 0000-0001-6615-3438  id


What is ORCID? This ORCID ID has been Authenticated.

Next

ORCID Editorial Manager 

Uses the secure interaction

has asked for the following access to your ORCID Record

 Read your ORCID record

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

Sign into ORCID or Register now

Personal account Institutional account

Sign in with your ORCID account

Email or ID *

0000-0003-2647-5154

ORCID Password

.....

Forgotten password?

Deny Authorize

Corresponding Author Verification

This can be made a Requirement for Submission; so submission process cannot be completed without an ORCID iD

Please Select an Article Type

Choose the article type of your manuscript from the pull-down menu. Please check the 'instructions for authors' for guidance.

Choose Article Type

An Authenticated ORCID iD is required for this Article Type

This publication requires that Authors Link to their ORCID record to Authenticate their ORCID iD before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

Use the button below to go to ORCID, log into your record there – or create one – and authorize the return of your ORCID Identifier. You must do this unless you intend to change the designated Corresponding Author for this submission.

ORCID iD: (None)

[Link to ORCID Record](#) [What is ORCID?](#)

Choose the article type of your manuscript from the pull-down menu. Please check the 'instructions for authors' for guidance.

WARNING: Corresponding Authors must supply an Authenticated ORCID iD. Are you sure you want to proceed without retrieving your ORCID iD?

and authorize the return of your ORCID Identifier. You must do this unless you intend to change the designated Corresponding Author for this submission.

ORCID iD: (None)

[Link to ORCID Record](#) [What is ORCID?](#)

New Submission

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- Enter Keywords
- Select Classifications
- Enter Comments
- Request Editor
- Attach Files

Summary Following Attach Files

Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required Items are marked with *. You can change the order by re-numbering the files.




	Online	Offline		Online	Offline
*Manuscript	1	0			


You cannot complete your submission until the following requirements are met (click on the bold text to be navigated to the appropriate step):

You did not retrieve your ORCID ID on the Select Article Type step.

Co-Author Verification

You have been named as a co-author, please verify -
[EMID:2720efc7088af39a]

 DELETE  REPLY  REPLY ALL

 em.jxyz.0.5061e0.6731714c@editorialm
Fri 06/01/2017 21:25

To: Sean MacRae;

Action Items

Dear Smith,

You have been names as an author on Requiring co-authors to
when not registered..

To verify and login/register:
<http://jxyz.edmgr.com/l.asp?i=951&l=VN364RUE>

To decline to verify:
<http://jxyz.edmgr.com/l.asp?i=952&l=IEUXYCEL>

Warning! You must submit this page to verify your contribution to the submission.

Verify Contributing Authorship Insert Special Character

This publication requests that authors link to their ORCID profile to retrieve an 'Authenticated' ORCID Identifier. This will support the correct attribution of this submission to you if accepted for publication. If you have not yet registered for an ORCID iD, you can also use the button below to register and authenticate a new one.

ORCID iD: (None)

[Link to ORCID Profile](#) [What is ORCID?](#)

[Submit to Publication](#)

The Co-Author ORCID request slots into the verification process, with or without registration, with or without a Questionnaire to complete

Recommendations: ORCID SSO & Deep Link

Configure Login Page

Please select any alternative, third party Login options you also wish to enable.

 Login via ORCID

If you want to customize various components of the publication's Login page, you can change the settings and modify the HTML in the text boxes below. We strongly suggest

- PolicyManager>Configure Login Page to enable ORCID SSO
 - Required to allow login to existing record on e.g. Registration
 - Is helpful to users & can persuade them to supply ORCID IDs
- PolicyManager>Edit Letters to add Authentication Deep Link to
 - Registration Confirmation
 - Submission Confirmation
 - Reviewer Invites/Instructions
 - Send Batch E-Mail
 - Remember: it confirms existing Authenticated ORCID IDs

Letter Body: [Insert Custom Merge Field](#) | [Insert System Merge Field](#)

```
Dear %TITLE% %LAST_NAME%,

Thank you for registering for Editorial Manager.

We ask that users retrieve their ORCID IDs via the secure
Authorization process. If you see a link, please click it in order to
retrieve your ORCID ID (you can register with ORCID if you do not yet
have one).

%ORCID_AUTHENTICATE_DEEP_LINK%

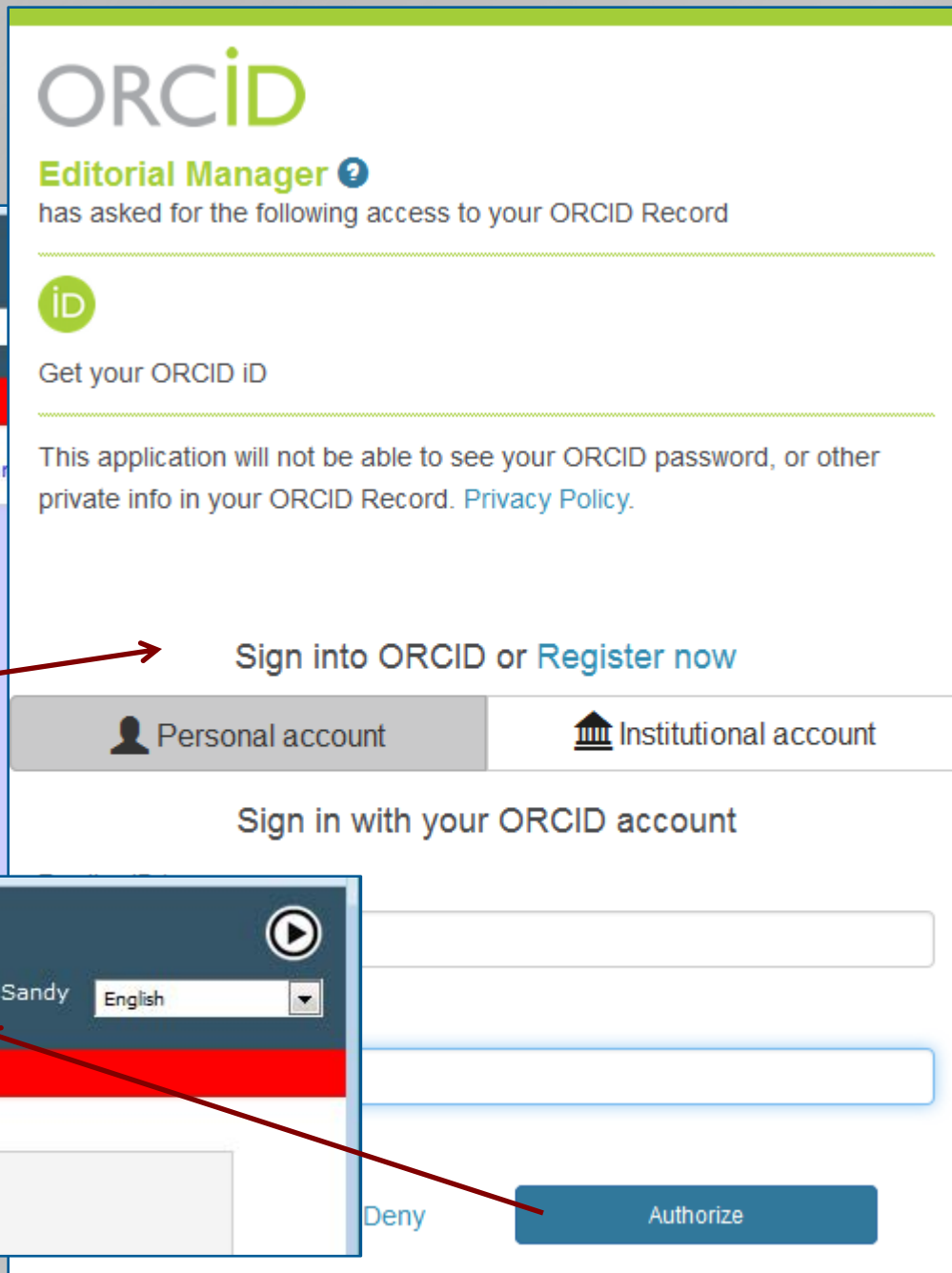
Best regards,

JXYZ Editorial Office
```

ORCID Single Sign-On is a benefit for users who submit to, or review for multiple sites



The screenshot shows the Editorial Manager login page. At the top left is the 'em Editorial Manager' logo. A navigation bar contains links: HOME, LOGIN, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. The user is 'Not logged in.' and the language is set to 'English'. A red banner reads: 'Important Message: Site under development. Do not use for live manuscript submission.' The main content area is titled 'Login' and contains a form with fields for 'Username:' and 'Password:'. Below the form are buttons for 'Author Login', 'Reviewer Login', 'Editor Login', and 'Publisher Login'. An 'ORCID' icon is present with the text 'Or Login via: id What is ORCID?'. There are also links for 'Send Login Details', 'Register Now', and 'Login Help'. The footer includes 'Software Copyright © 2017 Aries Systems Corporation. Privacy Policy'.



The screenshot shows the ORCID authorization screen. At the top is the 'ORCID Editorial Manager' logo. Below it, it says 'Editorial Manager' with a question mark icon, followed by 'has asked for the following access to your ORCID Record'. There is a section for 'id' with the text 'Get your ORCID id'. Below that, it states 'This application will not be able to see your ORCID password, or other private info in your ORCID Record. Privacy Policy.' There are two buttons: 'Sign into ORCID or Register now' and 'Personal account' (selected) and 'Institutional account'. Below these is the text 'Sign in with your ORCID account'. At the bottom right, there are 'Deny' and 'Authorize' buttons. A red arrow points from the 'id' icon in the left screenshot to the 'id' icon in this screenshot.



The screenshot shows the Editorial Manager Author Main Menu. At the top left is the 'em Editorial Manager' logo. A navigation bar contains links: HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. The user is logged in as 'Sandy' with the role of 'Author' and the language set to 'English'. A red banner reads: 'Important Message: Site under development. Do not use for live manuscript submission.' The main content area is titled 'Author Main Menu' and contains a 'New Submissions' section with links for 'Submit New Manuscript' and 'Submissions Sent Back to Author (0)'. A red arrow points from the 'Authorize' button in the right screenshot to the 'Important Message' banner in this screenshot.

format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

Letter Body:

[Insert Custom Merge Field](#) | [Insert System Merge Field](#)

Dear %TITLE% %LAST_NAME%,

Thank you for registering for Editorial Manager.

You can change your password and other personal information at http://jxyz.editorialmanager.com/info_update.asp.

We require that all authors supply an ORCID iD, it will appear here; if you do not have one, please give us access to retrieve it (if you do not have one, you can register for one):

%ORCID_AUTHENTICATE_DEEP_LINK%

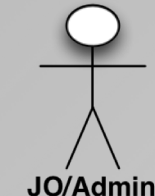
Best regards,
JXYZ Editorial Office

Insert System Merge Fields

You can drag and drop merge fields from here to the letter Subject or Body. [\(more...\)](#)

ORCID Expand All | Collapse All

- + %CORRAUTHOR_ORCID%
- + %ORCID%
- + %ORCID_AUTHENTICATE_DEEP_LINK%



JO/Admin

Chases missing iDs

There's an ORCID Authentication merge field designed to be used in any letter; it confirms the ORCID iD if the user has one, and is a link if an Authenticated iD has not been retrieved

Dear Dr Smith:

Thank you for registering for Editorial Manager.

We ask that users retrieve their ORCID iDs via the secure Authorization process; if you already did this, you will see your ORCID iD below. If you see a link, please click it in order to retrieve your ORCID iD (you can register with ORCID if you do not yet have one).

[Link and Authenticate your ORCID Profile](#)

Best regards,
JXYZ Editorial Office

Dear Dr Smith:

Thank you for registering for Editorial Manager.

We ask that users retrieve their ORCID iDs via the secure Authorization process; if you already did this, you will see your ORCID iD below. If you see a link, please click it in order to retrieve your ORCID iD (you can register with ORCID if you do not yet have one).

Your ORCID iD: 001-1234-5555-987X is already linked and Authenticated.

Best regards,
JXYZ Editorial Office

Administrative Functions

- [System Administrator Functions](#)
- [Register New User](#)
- [Reports](#)
- [Send Reminder Letters](#)
- [Send Batch E-mail](#)

e.g. an annual 'check your details' letter

Recommendations: Proxy Registration

Configure Fields for Proxy Registration

Please select the fields you would like to present and require during the Proxy Registration process. Required fields will be labelled in red and designated with an asterisk on the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. Optional fields will be labelled in blue. Fields in red text below are required by Editorial Manager and cannot be made optional by the publication.

Required	Hidden	System Field
<input type="checkbox"/>	<input type="checkbox"/>	Title
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Given/First Name
<input type="checkbox"/>	<input type="checkbox"/>	Middle Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Family/Last Name
<input type="checkbox"/>	<input type="checkbox"/>	Degree
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preferred Name
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Telephone Number
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fax Number
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Secondary Telephone Number
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Secondary Telephone Number is for
<input checked="" type="checkbox"/>	<input type="checkbox"/>	E-mail
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Preferred Method of Contact
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ISNI
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ORCID
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PubMed Author ID
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ResearcherID
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Scopus Author ID
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Position

- **Configure Proxy Registration:**
 - Sets the fields the Editor can supply.
 - ORCID's available
- We recommend keeping ORCID iD as 'Hidden' here
 - i.e. Don't allow Editors to supply the iD for someone else
 - Older functionality (curse of the early adopter), deprecated
 - Rely on users retrieving own ORCID iD – thus 'Authenticating' it

Recommendations: Proxy registration

Configure Expedited Reviewer Login

Enable Expedited Reviewer Login

Please select the fields you would like to require Reviewers to fill in when they login after being Proxy Registered by the journal office. If all required fields are populated during the Proxy Registration process, the Reviewer will proceed directly to the Reviewer Main Menu when he logs in. If one or more required fields are not filled in, the Reviewer will be forced to enter the missing fields when he logs in.

Fields in bold text are required by the system and cannot be made Optional by the publication.

- Title
- Given/First Name**
- Middle Name
- Family/Last Name**
- Degree
- Preferred Name
- Telephone Number
- Fax Number
- Secondary Telephone Number
- Secondary Telephone Number is for
- E-mail**
- Preferred Method of Contact**
- ISNI
- ORCID
- PubMed Author ID
- ResearcherID

- **Configure Expedited Reviewer Login:**
 - Sets the fields the Reviewer *must* supply if the Editor did not
- **Make the ORCID Required to get the Reviewer to supply it**
 - Is this desirable for Reviewers?
Most journals ask from Authors only
 - Also uses main Edit Registration Field Setting to 'Force Users to Authenticate'.
 - i.e. not just type or paste it in

Editor Proxy-Registers

Proxy Register New User

You may register a new user and send that new user a custom Welcome letter, or choose not to send a letter. To begin the Proxy Registration process, please enter the following information:

Editor supplies some initial details – a configured sub-set of all registration fields. So the ORCID iD can be included here but we recommend not.

[Insert Special Character](#)

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.](#)

Required Information

Personal Information

Given/First Name *
Family/Last Name *
Preferred Method of Contact * E-mail Fax Postal Mail Telephone

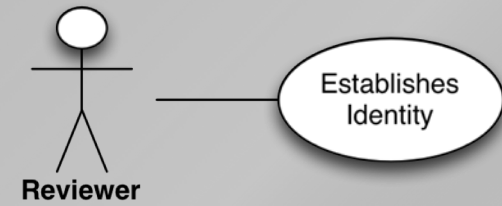
Institution Related Information

Country *
Address is for (Work, Home, Other) * Work Home Other

+ User Information

+ Enter More Contact Information

Expedited Reviewer Login



Editorial Manager™

English

Message: You have already been registered on this system. Please provide the missing information before starting your work.

OK

om testweb.edmgr.com...

Update My Information

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

EM then asks the Reviewer for fields Required from them and not already supplied by the Editor

Insert Special Character

Personal Information

Title *

ORCID * [Fetch/Register](#)

[What is ORCID?](#)

Institution Related Information

Institution * (max 300 characters)

Department * (max 450 characters)

Street Address *

City *

State or Province *

Proceed

'Existing Record' check, during Submission

Please Select an Article Type

Choose the article type of your manuscript from the pull-down menu. Please check the 'instructions for authors' for guidance.

Choose Article Type: Rapid communication

An Authenticated ORCID iD is required for this Article Type

This publication requires that Authors Link to their ORCID record to Authorize ORCID iD before they submit. You only need to do this once in order to associate your ORCID record with your user record here.

Use the button below to go to ORCID, log into your record there – or create a new record and authorize the return of your ORCID Identifier. You must do this unless you are the designated Corresponding Author for this submission.

ORCID iD: (None)

[Link to ORCID Record](#) [What is ORCID?](#)

[Next](#)

Previous Registration Found

ORCID

Sandy Sandbox
<http://sandbox.orcid.org/0000-0001-6615-3438>
[\(Not You?\)](#)

This ORCID iD is already linked to a different User Record.

We have found an existing User account that is already linked to the ORCID Identifier you have just authorized us to retrieve. This means that you must have already registered with this publication and linked your ORCID iD to that account.

Because only you can authorize access to your ORCID profile, you can simply click the button below to switch to the account you previously created.

After switching, before Submitting your Manuscript, you may wish to check that your existing details are up-to-date using 'Update My Information' in the main menu bar.

ORCID iD: 0000-0001-6615-3438

Name: Dr Sandra Sandbox

Institution: Aries Systems

Country: UNITED STATES

E-mail: sandys@emtesting.co.uk

Registered: Jan 07 2017 02:52PM

[Switch to this Login](#)

[Cancel](#) [Submit without ORCID iD](#)

When a user retrieves an ORCID iD; we check for existing records. Looks like this author registered in order to submit but forgot a previous registration.

'Existing Record' Check during Registration

The image shows a sequence of three overlapping screenshots from a registration process:

- Top Screenshot:** A registration form titled "Choose a Registration Method". It has a sub-header "Retrieve your details from the ORCID registry:" and a button labeled "Use My ORCID Record". Below this, there are input fields for "Given/First Name", "Family/Last Name", and "E-mail Address". A red arrow points from the "Use My ORCID Record" button to the middle screenshot.
- Middle Screenshot:** A white box titled "ORCID iD Retrieved". It contains the ORCID logo and a URL "http://sandbox". Below this is a green eye icon and the text "Editorial Manager" followed by "has asked for the following access to your ORCID record". At the bottom, there are "Deny" and "Authorize" buttons. A red arrow points from the "Authorize" button to the bottom screenshot.
- Bottom Screenshot:** A white box titled "ORCID iD match". It contains a message: "Your ORCID iD is already registered with this publication". Below this, it shows "ORCID iD: 0000-0001-6615-3438" and "is linked to: Dr Sandra Sandbox sandys@emtesting.co.uk". At the bottom, it says "This means you can simply log in to this existing account." and has a "Proceed with Login" button.

A red box in the bottom right corner contains the text: "Had they registered with an ORCID, they would have found out even earlier – here the ORCID iD prevents an unnecessary registration".