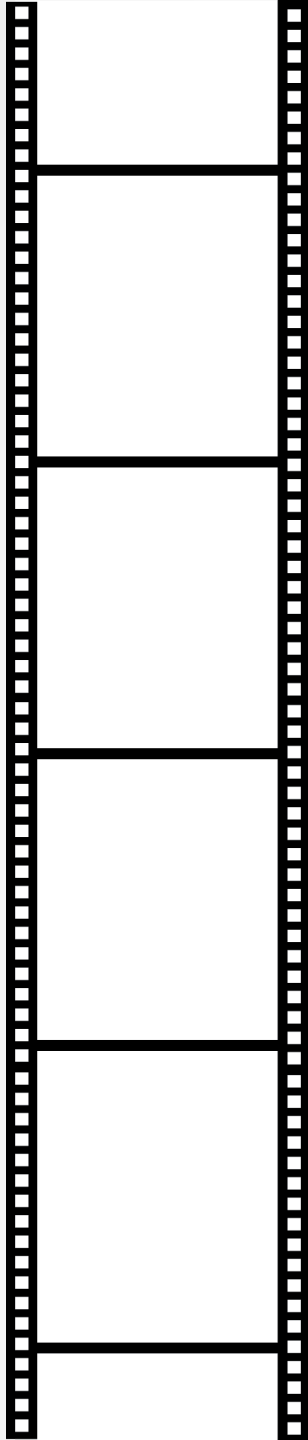


Welcome to
EMUG 2017
BOSTON



www.ariessys.com





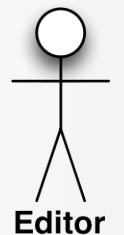
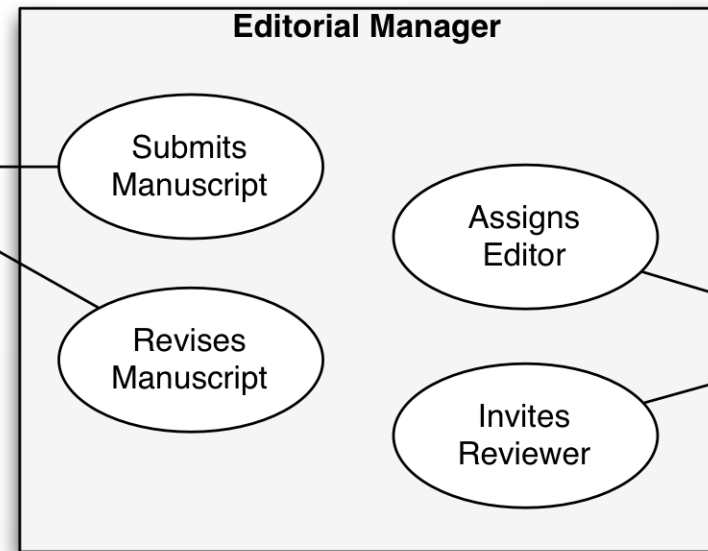
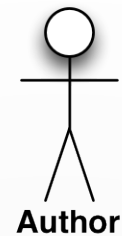
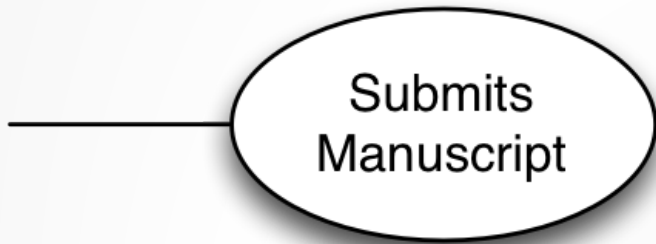
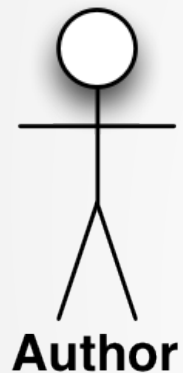
ORCID in Bloom

ORCID and EM Use Cases

Sean MacRae, Business Systems Analyst

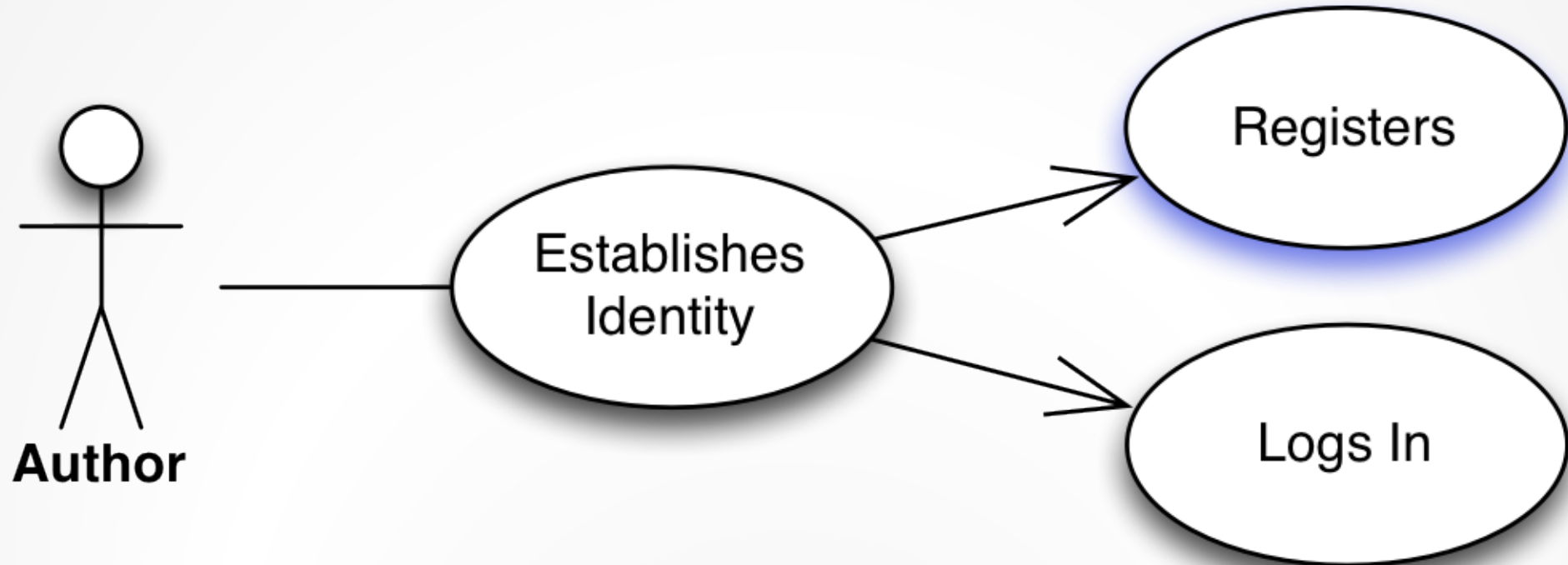
Use Case?

A **use case** is a sequence of actions that **an actor** (usually a person, but perhaps an external entity such as another system) performs in a system to achieve **a particular goal**.*

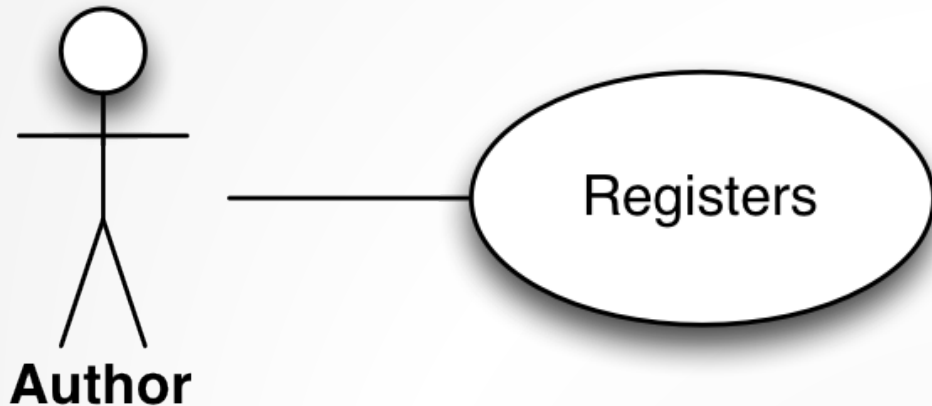


* Rosenberg & Scott, *Use Case Driven Object Modeling with UML*

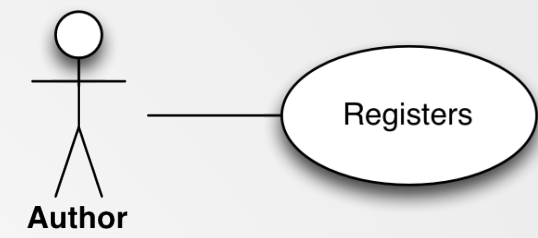
Author Establishes Identity



Author Registers



- Author declares their identity
- Name, address, affiliations, contact details
- E-Mail linked to identity by common usage
- ORCID now available, linked to identity
 - Held in third party register.
 - User can 'Prove' they own it; not simply say so
 - So what? Anyone can claim an ORCID iD



Retrieve *my* ORCID iD

Unlike simple metadata, an ORCID iD can be retrieved directly from ORCID

Registration Page

To register to use the Editorial Manager system, please enter the requested information. Required fields have a * next to the label. Upon successful registration, you will be sent an e-mail with instructions to

[Insert Special Character](#)

Personal Information

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

Given/First Name *

Middle Name

Family/Last Name *

Secondary Family/Last

Preferred Contact Method * E-mail Fax Postal Mail Telephone

ISNI

ORCID [Fetch/Register](#)

[What is ORCID?](#)

PubMed Author ID

ResearcherID

~~ResearcherID and ORCID iD are unique identifiers that are sent to you from online systems. [Read More.](#)~~

Preferred Contact Method * E-mail Fax Postal Mail Telephone

ISNI

ORCID [Delete](#)

PubMed Author ID

ResearcherID

Scopus Author ID

ORCID

Editorial Manager [?](#)

has asked for the following access to your ORCID Record

Read your biographical information

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

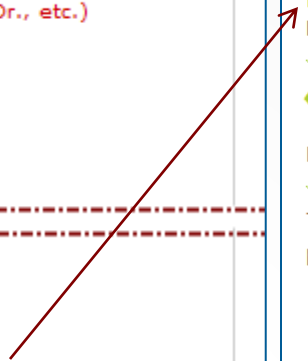
Email or iD *

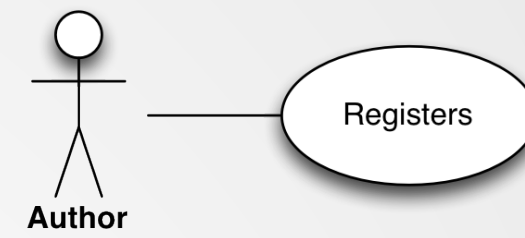
ORCID Password

[Forgotten password?](#)

[Deny](#)

[Authorize](#)





Register via ORCID

Pre-registration Page

To register to use the Editorial Manager system, please enter the requested information. Upon successful registration, you will be sent an e-mail with instructions to verify your registration.

Please Enter the Following Insert Special Character

Given/First Name*	<input type="text"/>
Family/Last Name*	<input type="text"/>
E-mail Address*	<input type="text"/>
ORCID	<input type="text"/>

[Fetch/Register ORCID](#)

[What is ORCID?](#)

The pre-registration page layout changed in 13.1 for publications using ORCID iDs

WARNING - If you think you already have an existing registration (Author, Reviewer, or Editor) in this system, please DO NOT register. This will cause delays or prevent the processing of any review or manuscript. If you are unsure if you are already registered, click the 'Forgot Your Login Details?' link.

If you are registering again because you want to change your information, changes must be made to your existing information by clicking the 'Change Information' link on the menu bar. If you are unsure how to do this, please contact the editorial office.

Choose a Registration Method Insert Special Character

Retrieve your details from the ORCID registry:

Or type in your details and continue to register without using ORCID:

Given/First Name*	<input type="text"/>
Family/Last Name*	<input type="text"/>
E-mail Address*	<input type="text"/>

WARNING - If you think you already have an existing registration of any type (Author



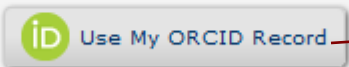
Registers

Users will see the same basic interaction as before, but we will retrieve more data

Choose a Registration Method

[Insert Special Character](#)

Retrieve your details from the ORCID registry:



Or type in your details and continue to register without using ORCID:

Given/First Name*

Journal A



Not logged in.

HOME • LOGIN • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Select Affiliation to register with

These are contact details from your ORCID profile. Please choose one to base your registration on.

You will be able to change this information before completing your registration.



Loading ORCID user Profile



Editorial Manager ?

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

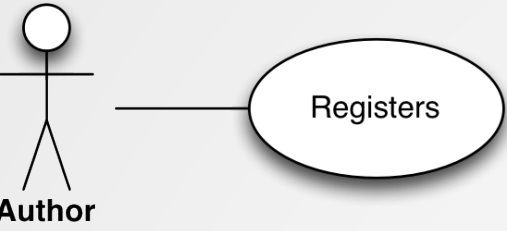
Email or ID *

ORCID Password

[Forgotten password?](#)

Deny

Authorize



This allows us to pre-populate the registration page

ORCID users control what is private; emails & affiliations must be set to be seen by 'trusted parties' or 'everyone' for EM to be able to read them

Registration Page

To register to use the Editorial Manager system, please enter the requested information. Required fields have a * next to the label. Upon successful registration, you will be sent an e-mail with instructions to verify your registration.

Biography

Education (0)
You haven't added any education, [add some now](#)

Employment (1)

Aries Systems Corporation: North Andover, MA, United States
2003-01 to present
Business Systems Analyst (Product Management)
Source: SJ Mac Created: 2016-12-21

Who can see this?
 everyone
 trusted parties
 only me
[More information on privacy settings](#)

Personal Information Insert Special Character

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

Given/First Name *

Middle Name

Family/Last Name *

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

Preferred Name (nickname)

Primary Phone (including country code)

Secondary Phone (including country code)

Secondary Phone is for Mobile Beeper Home Work Admin. Asst.

Fax Number (including country code)

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.](#)**

Preferred Contact Method * E-mail Fax Postal Mail Telephone

ORCID [Delete](#)

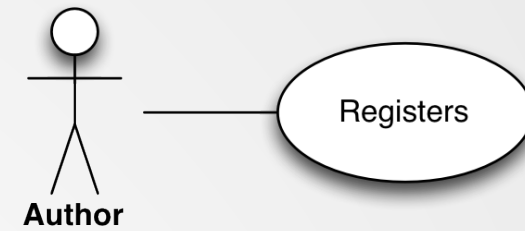
Institution Related Information Insert Special Character

Position

Institution (max 300 characters)

Department (max 450 characters)

Street Address



What is copied across?

- Given Name
- Family Name
- E-Mail address(es)
- ORCID iD (Authenticated)
- From Employment:
 - Position
 - Institution
 - Department
 - City
 - State
 - Country
- Keywords

Select Affiliation to Register with

These are contact details from your ORCID profile. Please choose one to base your registration on.

You will be able to change this information before completing your registration.

New

UK

12 Aug 2015 –

Visiting Professor
Department of Chemistry
University of Delaware
Newark
Delaware
US

10 Mar 2010 –

Dean
Department of Chemistry
MIT
Boston
Mass.
US

23 Jan 2002 – 20 Feb 2010

Professor
Department of Chemical Physics and Ne...
University of Delaware
Newark
Delaware
US

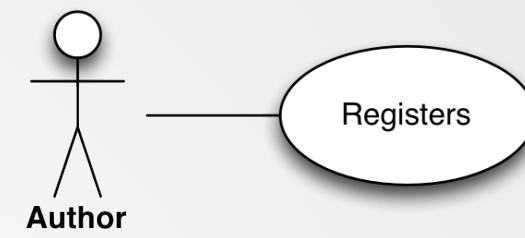
03 Aug 1998 – 30 Sep 2001

Lecturer
Department of Chemistry
University of Delaware
Newark
Delaware
US

Proceed

Proceed

Includes 'Select Affiliation' step for disambiguation



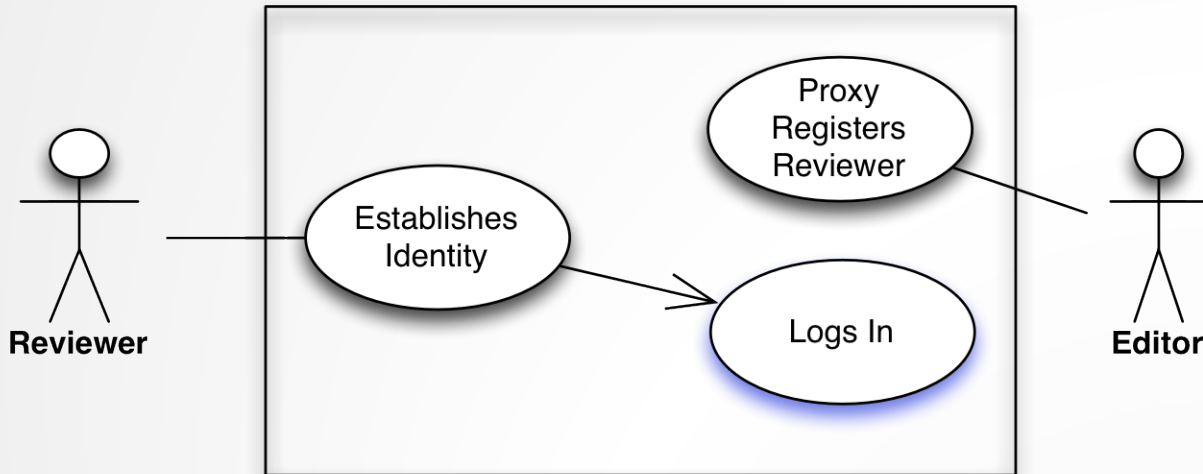
Configuration

If you decide to collect ORCID iDs, you can force users to retrieve an Authenticated ORCID using a secure API. Enabling the ORCID allows users to register with your publication using metadata from their ORCID profile. You can choose to make this the default option when registering with your publication.

Required	Hidden	System Field
<input checked="" type="checkbox"/>		Title
<input checked="" type="checkbox"/>		Given/First Name
<input type="checkbox"/>		Middle Name
<input checked="" type="checkbox"/>		Family/Last Name
<input type="checkbox"/>		Degree
<input type="checkbox"/>		Preferred Name
<input type="checkbox"/>		Telephone Number
<input type="checkbox"/>		Fax Number
<input type="checkbox"/>		Secondary Telephone Number
<input type="checkbox"/>		Secondary Telephone Number is for
<input checked="" type="checkbox"/>		E-mail
<input checked="" type="checkbox"/>		Preferred Method of Contact
<input type="checkbox"/>	<input type="checkbox"/>	ISNI
<input type="checkbox"/>	<input type="checkbox"/>	ORCID
		<input checked="" type="checkbox"/> Require users to Authenticate with ORCID
		<input type="checkbox"/> Ask users to Register via ORCID by default

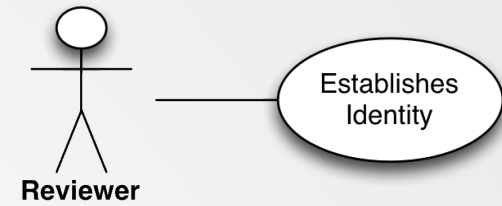
- **PolicyManager>Edit Registration Fields:**
- Collect ORCID as Registration Field (maybe require?)
- Force Users to Authenticate (not just type or paste it in).
- ORCID Registration then available as standard option
 - But you can make it the default
 - Any Register link will then go to ORCID *first*.

Reviewer Establishes Identity



- Reviewers can be existing Users
 - Self-registered as before
- But Editors often Proxy-register new Reviewers
- Reviewers then confirm their details on login
 - Can include ORCID iD
 - Better to get Reviewer to retrieve their own (Authenticated version)

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

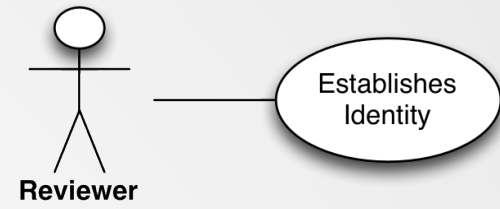
Institution Related Information

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?](#)

Insert Special Character

Institution Related Information

Institution * (max 300 characters)

Department * (max 450 characters)

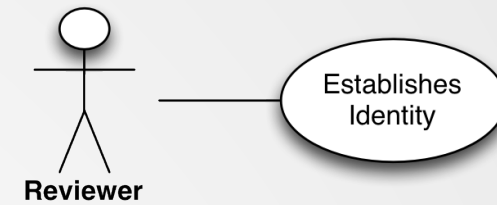
Street Address *

City *

State or Province *

Proceed

Configuration: Editor



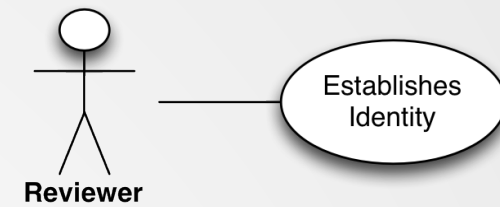
Configure Fields for Proxy Registration

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

Configuration: Reviewer



Configure Expedited Reviewer Login

Enable Expedited Reviewer Login

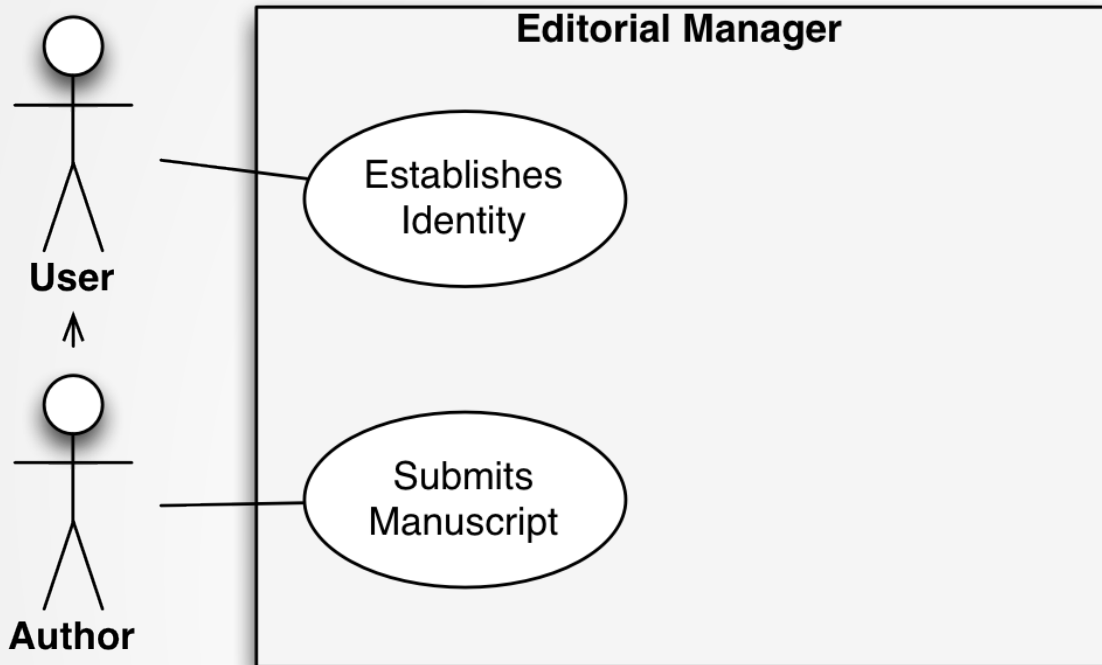
Please select the fields you would like to require Reviewers to fill in when they login after being Proxy Registered by the journal office. If all required fields are populated during the Proxy Registration process, the Reviewer will proceed directly to the Reviewer Main Menu when he logs in. If one 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

Author Submits MS



- Not all users are Authors:
 - Every user has to register whether author or not
- Authors Submit Manuscripts
- Some publications have ‘only Authors need ORCID iD’ policy
- EM can retrieve ORCID IDs from Authors
 - Corresponding Authors during Submission process
 - Co-Authors through Verification process



Submits Manuscript

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

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

[What is ORCID?](#) This ORCID ID has been Authenticated.

Next

ORCID

Uses the secure interaction

Editorial Manager

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 *

ORCID Password

[Forgotten password?](#)

Deny

Authorize



Submits Manuscript

Since 13.1, this can be made a Requirement for Submission; so submission process cannot be completed without an ORCID iD

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

Remove Author

Keywords

Classifications

Comments

Request Editor

ORCID iD: (None)

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

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

OK Cancel

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

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?](#)

Next

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.

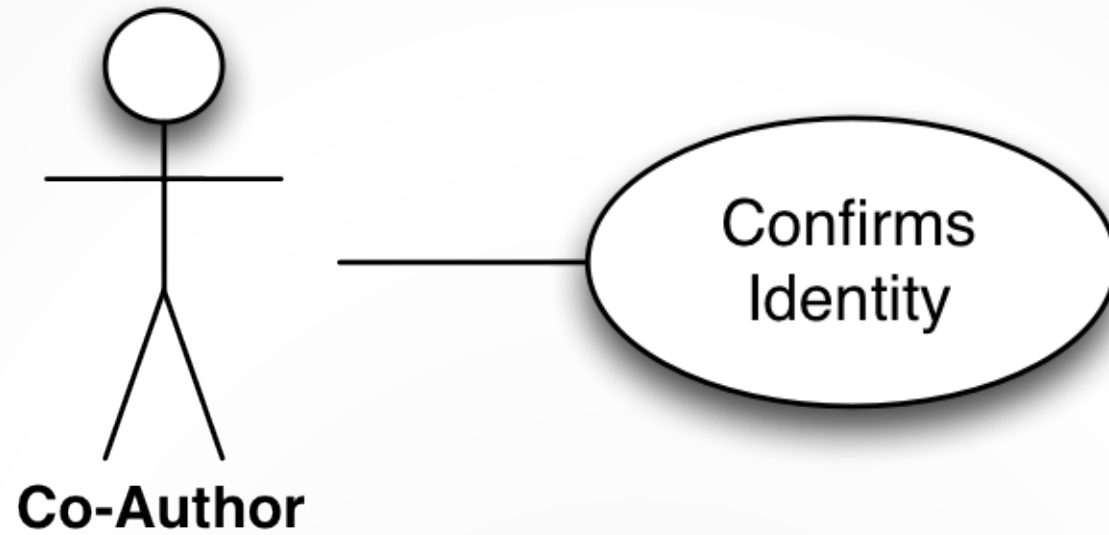
	Online	Offline		Online	Offline
*Manuscript	1	0			

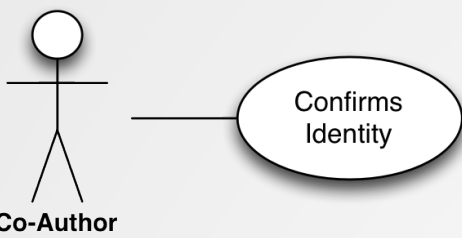
You cannot complete your submission until the following requirements are met (click on the bold text to be navigated to the appropriate step):

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

Previous


Co-Author Verification





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

X 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.

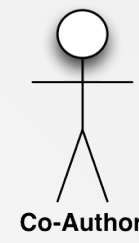
ORCID iD: (None)

[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

Configuration



Cancel Submit

Article Type: Rapid communication
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:**

~~Hide~~ When you ~~hide~~ an Article Type, the Article Type will be deactivated (not available for new manuscripts).

Send Author/Editor PDF at First Revision

Author Parameters	First Revision	Subsequent Revisions
Number of days Author has to Revise Submission:	93	62

Authenticated ORCID iD Request: Required ▼

Authors must suggest a minimum of 0 Reviewers when submitting their manuscripts.

Co-Author Parameters

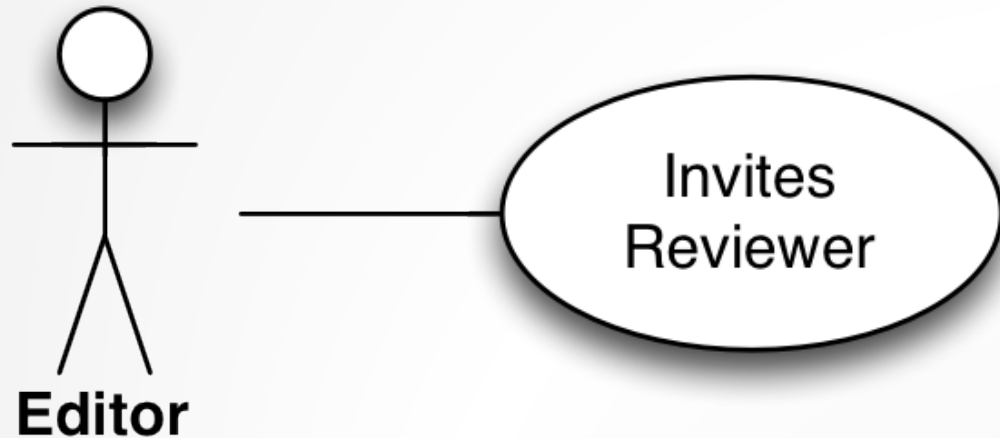
Register/Verify Other Authors

Corresponding Author only ▼

Authenticated ORCID iD Request: Optional ▼

- 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

Editor Invites Reviewer



- When Choosing Reviewer, Editor Looks for Experience
 - Past authorship
 - Past reviews
 - External information, reputation, standing
- ORCID is not just an iD; there's a profile behind it
 - ORCIDs shown in EM allow drill-through to public ORCID Record
 - Should become source of all of the above



Invites Reviewer

Editor sees summary stats when searching for Reviewers

Search for Reviewer All Reviewers - Manuscript Number JXYZ-D-05-00007 Anne A. Author Tensile strength in Amide polymer threads

[View Reviews and Comments](#) [Manuscript Details](#) [Register and Select New Reviewer](#)

Reviewer Candidates

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

Page: 1 of 1 (17 total Reviewers)

Display 100 results per page.

Select As				Reviewer	Board	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics	
Inv.	Asn.	Alt.	Prop.	Name	Member		Reviews in Progress:	Completed Reviews:	Date Last Invited:	Outstanding Invitations:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Michael Di Natale <small>((Reviewer))</small>	No	4 Personal Class found 10: Water 20: Second Major Term 10.200: Hydrodynamics 10.400: Dams and Hydroelectrics 2 Class match with MS * 10: Water * 20: Second Major Term	Reviews in Progress: 0 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Last Review Completed: - Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0	Date Last Invited: - Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bad Rev <small>((Reviewer))</small>	Yes	1 Personal Class found	Reviews in Progress: 0	Date Last Invited: 03-11-		

This person has very little history with the current publication



Invites Reviewer

Reviewer Name drills-down to People Information

People Information - Michael Di Natale

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

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

[Open Special Character Palette](#)

Search for Reviewer All Reviewer

Tensile strength

[View Reviews and Comments](#) [Ma](#)

Select a checkbox by each person you wish to select as a

Page: 1 of 1 (17 total Reviewers)

Select As				Reviewer	Board	Classifications
Inv.	Asn.	Alt.	Prop.	Name	Member	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Michael Di Natale ((Reviewer))	No	4 Personal Class for 10: Water 20: Second Major Term 10.200: Hydrodynamic 10.400: Dams and Hy
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Aries Systems Corporation		2 Class match with * 10: Water * 20: Second Major Term
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bad Rev ((Reviewer))	Yes	1 Personal Class for

General Information

Permanent Address: (Current Address)	Aries Systems Corporation 200 Sutton St. United States North Andover, MA 01864 UNITED STATES 867 5309 mdinatale@ariessys.com
Secondary Information:	
People URLs:	None
Unavailable Dates:	None
Role:	Author, Reviewer
ORCID:	0000-0002-0136-5875
Scopus Author ID:	United States

Detailed People Notes

Add New Note:

Character Count: 0 / 4000

[Submit Note](#)

[View/Print All](#)

Operator	Note	Date	Action
No Detailed People Notes are available			



Editor

Invites Reviewer

orcid.org/0000-0002-0136-5875

Search [id] [gear] English

ORCID
Connecting Research and Researchers

FOR RESEARCHERS FOR ORGANIZATIONS ABOUT HELP SIGN IN

SIGN IN REGISTER FOR AN ORCID ID LEARN MORE

2,913,813 ORCID iDs and counting. See more...

Michael Di Natale

ORCID ID
id orcid.org/0000-0002-0136-5875

Biography
Recovering journalist, scholarly publishing professional

Websites
LinkedIN Profile

- Education (1)
- Employment (3)
- Works (7)

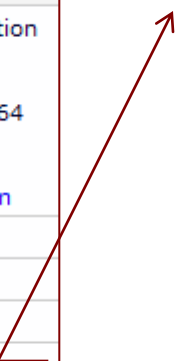
Seamlessly Import Manuscripts from Overleaf to Editorial Manager
ISMTE North American Conference
2016-08-10 | conference-poster
URL: <http://c.ymcdn.com/sites/www.ismte.org/resource/resmgr/Events/2016/NA/Poste...>
Source: Michael Di Natale Preferred source

Annual Meeting Report: Starting a New Journal: Nuts, Bolts, and Open Access
Science Editor: The quarterly publication of the Council of Science Editors
2016-08-01 | report
URL: <http://www.csescienceeditor.org/article/starting-a-new-journal-nuts-bolts-and-op...>
Source: Michael Di Natale Preferred source

And the ORCID iD 'drills down' to the Reviewer's public ORCID profile

General Information

Permanent Address: (Current Address)	Aries Systems Corporation 200 Sutton St. United States North Andover, MA 01864 UNITED STATES 867 5309 mdinatale@ariessys.com
Secondary Information:	
People URLs:	None
Unavailable Dates:	None
Role:	Author, Reviewer
ORCID:	0000-0002-0136-5875
Scopus Author ID:	United States





Editor

Invites
Reviewer

ORCID clearly identifies the source for any claimed work
– self-claimed, or updated by a trusted party



Mike

ORCID

id 0000-0002-0136-5875

Annual Meeting Report: Emerging Standards: Data and Data Exchange in Scholarly Publishing
 Science Editor: The quarterly publication of the Council of Science Editors
 2016-07-27 | report
 URL: <http://www.csescienceeditor.org/article/emerging-standards-data-and-data-exch...>

Source: Michael Di Natale Preferred source

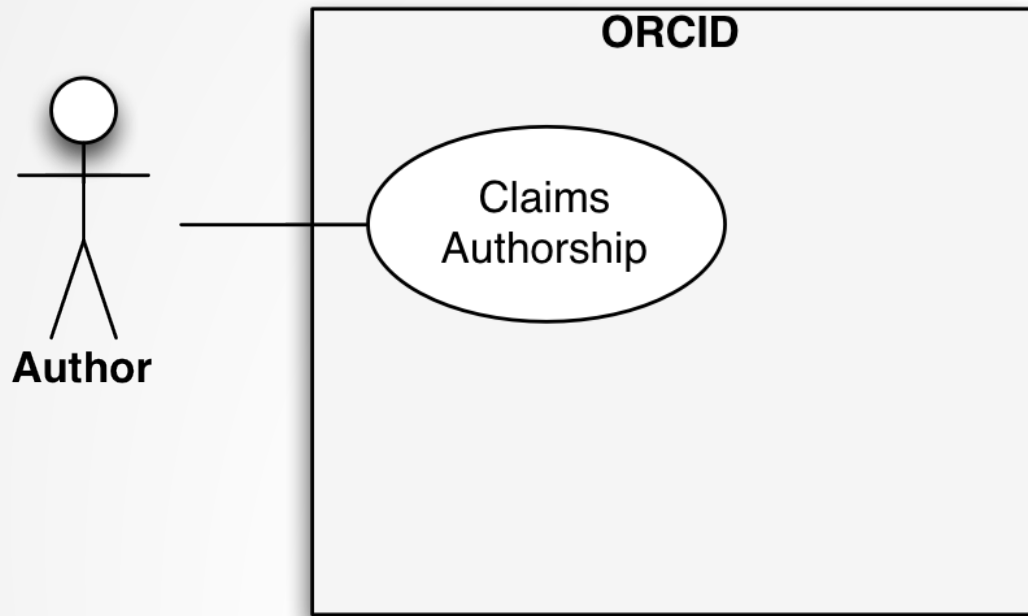
Transferring Manuscripts Between Publications in Editorial Manager
 Editorial Office News
 2016-03-01 | journal-article
 DOI: [10.18243/eon/2016.9.2.6](https://doi.org/10.18243/eon/2016.9.2.6)

Source: Crossref Preferred source

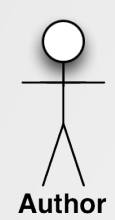


ORCID

Author Claims Authorship



- Author can add works to ORCID record
- Builds up a public profile of their research/publication history
 - E.g. Supports funding applications
 - As we've seen, helps your Editors



Claims
Authorship

Sandy Sandbox

ORCID ID
ID
sandbox.orcid.org/0000-0001-6615-3438
View public version

Get a QR Code for your ID ?

Also known as

Country

Keywords

Biography

Education (0) + Add education ↑↓ Sort
You haven't added any education, [add some now](#)

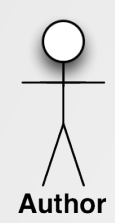
Employment (0) + Add employment ↑↓ Sort
You haven't added any employment, [add some now](#)

Funding (0) + Add funding ↑↓ Sort
You haven't added any funding, [add some now](#)

Works (0) + Add works ↑↓ Sort
You haven't added any works, [add some now](#)

Search & link
Import BibTeX
+ Add manually

Early experience of claiming 'works' in ORCID might have been via self-claiming mechanisms



Claims Authorship

ADD WORK

Work category *

Work type *

Title *

Subtitle

Journal title

Publication date

WORK IDENTIFIERS

Identifier type

Identifier value

Identifier URL

Relationship ?
 Self
 Part of

URL

Language used in this form

Country of publication

ORCID makes it clear what the provenance is for each credited work – self-credited appears under the name of the owner of this ORCID profile

Annual Meeting Report: Emerging Standards: Data and Data Exchange in Scholarly Publishing
 Science Editor: The quarterly publication of the Council of Science Editors
 2016-07-27 | report
 URL: <http://www.csescienceeditor.org/article/emerging-standards-data-and-data-exch...>

Source: Michael Di Natale Preferred source



Claims Authorship

Transferring Manuscripts Between Publications in Editorial Manager

Editorial Office News

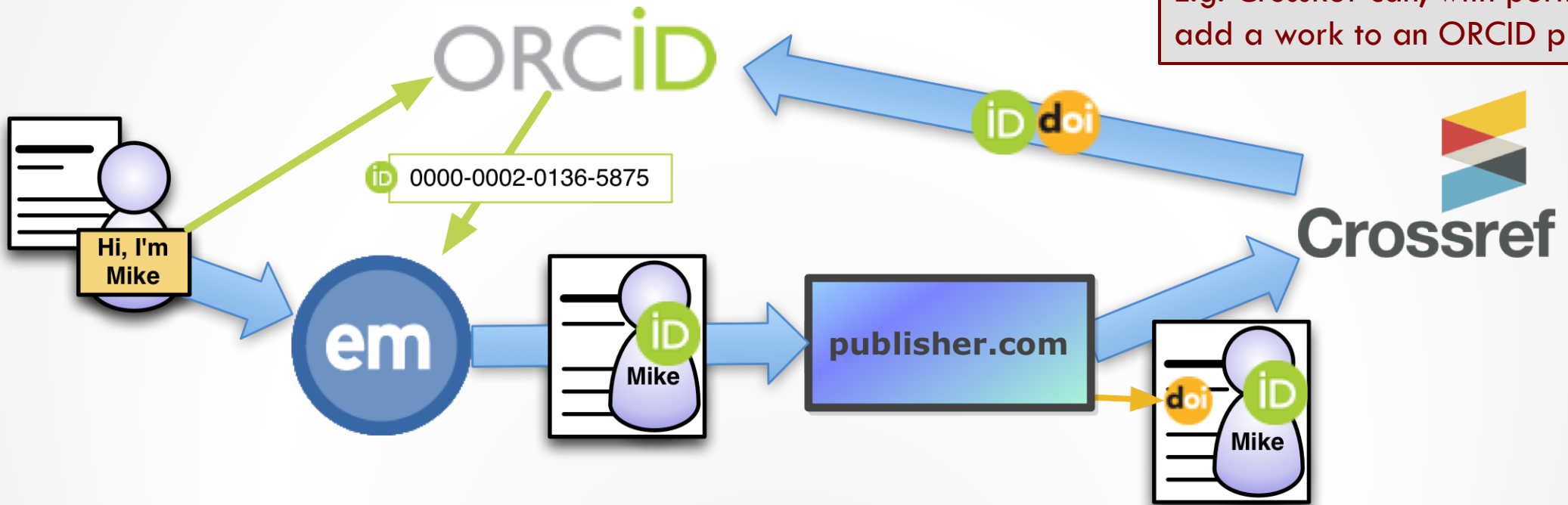
2016-03-01 | journal-article

DOI: 10.18243/eon/2016.9.2.6

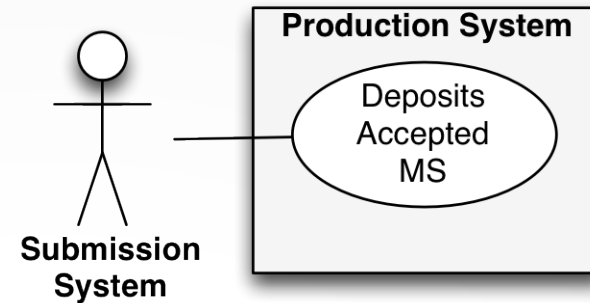
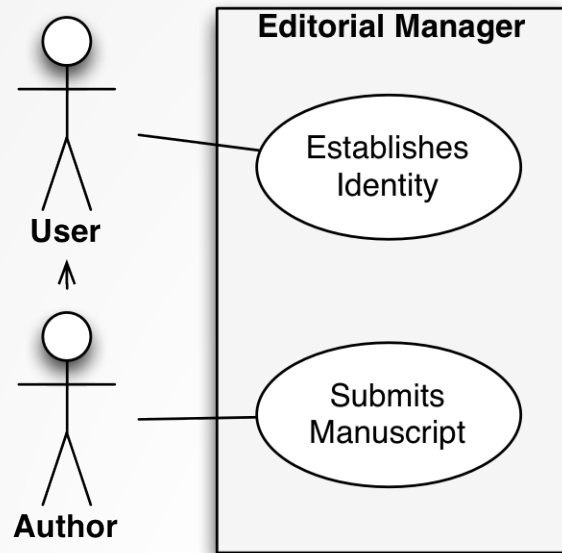
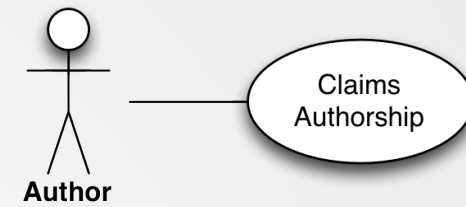
Source: Crossref

Preferred source

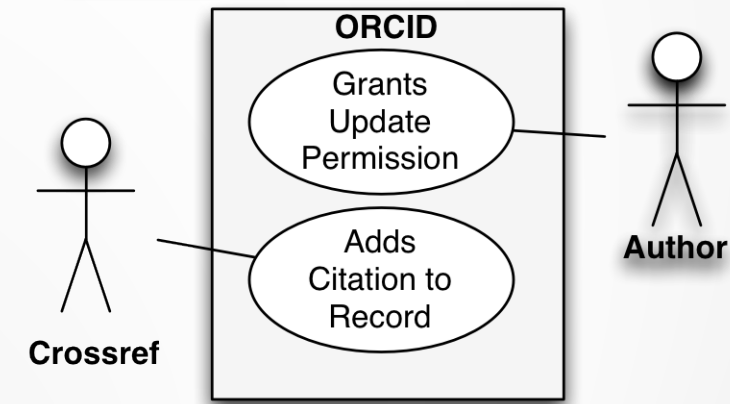
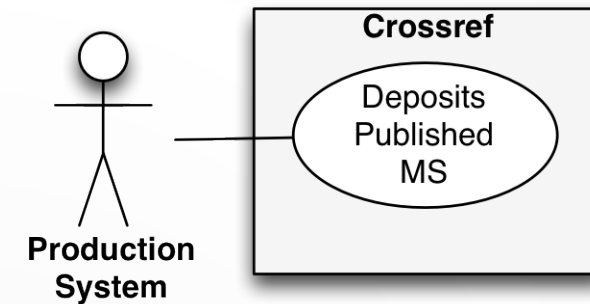
There are independent sources that don't involve the user self-claiming. E.g. CrossRef can, with permission, add a work to an ORCID profile.



Author Claims Authorship

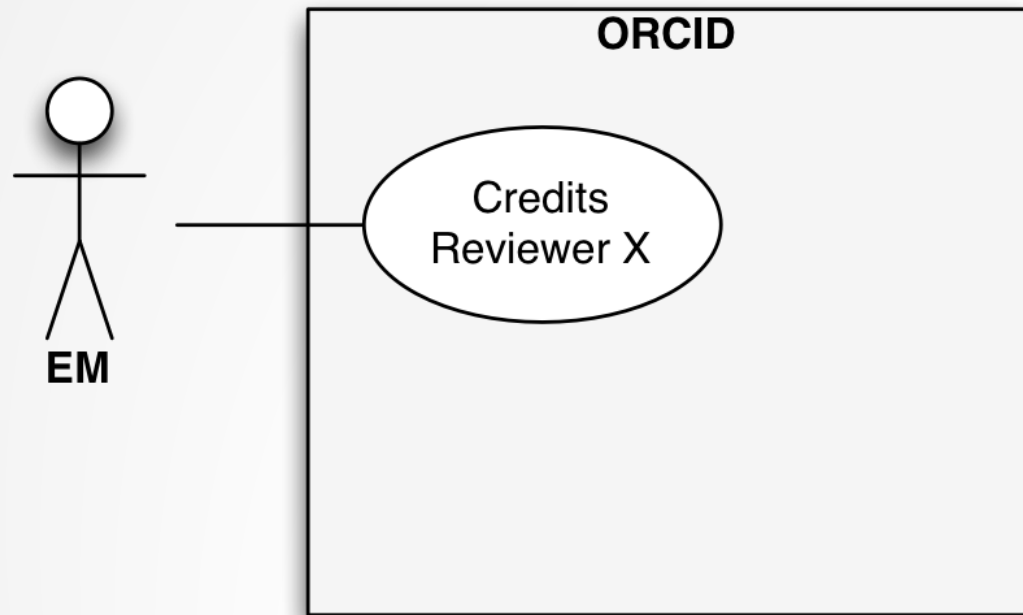


And we'll pass it on..



So there's interaction between several systems, each passing information on to the next. All you need to do is make sure you get that ORCID ID initially...

Reviewer Given Credit



- Sneak Preview!
- ORCID now supports Reviewer Activity
- But! Reviewers cannot claim credit themselves
 - Can only be given by other systems
- Coming to EM



Credits
Reviewer X

› Works (1)

▼ Peer Review (1)

▼ review activity for **Nature Neuroscience(4)**

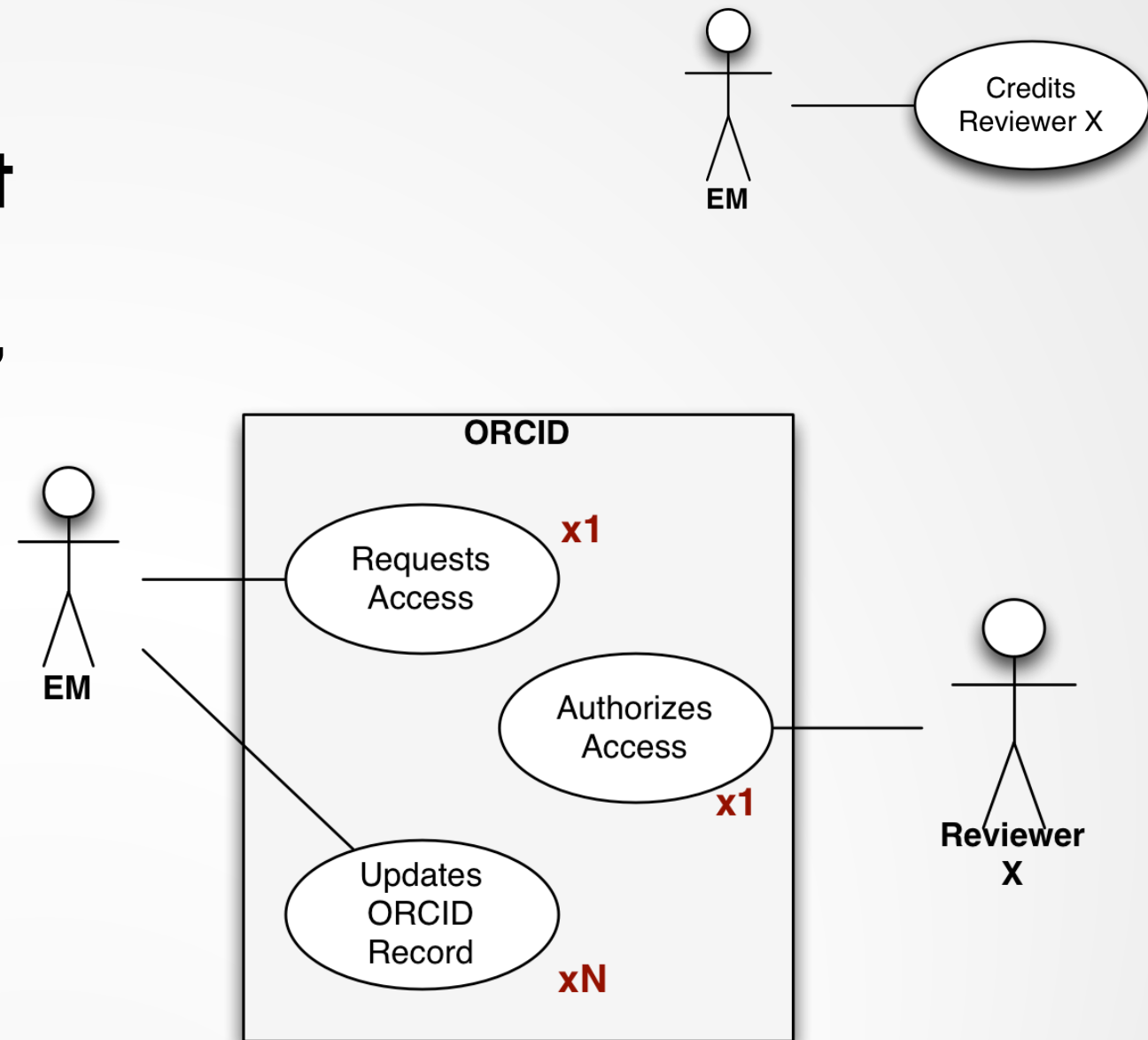
journal, Nature Neuroscience is a multidisciplinary journal that publishes papers of the highest quality and significance in all areas of neuroscience. The editors welcome contributions in molecular, cellular, systems and cognitive neuroscience, as well as psycho l

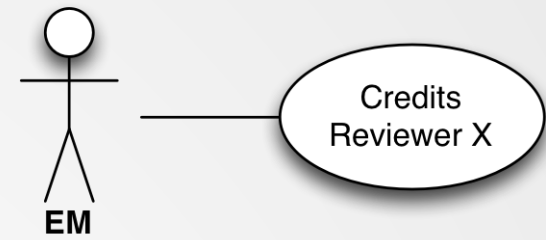
Review date	Type	Role	Actions
2005	review	reviewer	hide details view
Review identifier(s): SOURCE-WORK-ID: NPG-Neuro-230497826 Convening organization: Nature Publishing Group (London, United Kingdom)			
2014-11	review	reviewer	show details view
2014-03	review	reviewer	show details view
2013-02	review	reviewer	show details view

2013-02 review reviewer [hide details](#) | [view](#)
Review identifier(s): SOURCE-WORK-ID: NPG-Neuro-230497859
Convening organization: Nature Publishing Group (London, United Kingdom)
Review subject: Title of the publication that was reviewed (journal-article) Nature Neuroscience.
DOI: [230.3/0239x894.85](https://doi.org/10.1038/23030239x89485) | <http://dx.doi.org/230.3/0239x89...>

Reviewer Given Credit

- 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





Review forms can include an Authorization to transfer to ORCID. This triggers a one-time ORCID Authorization the first time a particular Reviewer says 'Yes'.

Transfer Authorization

[Instructions]

* If this submission is transferred to another publication, do we have your consent to include your identifying information?


Please Select Response Yes No

* If this submission is transferred to another publication, do we have your consent to include your review?

Please Select Response Yes No

ORCID Reviewer Credit

[Instructions]

Your ORCID iD: 0000-1234-0001-999X 

* 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

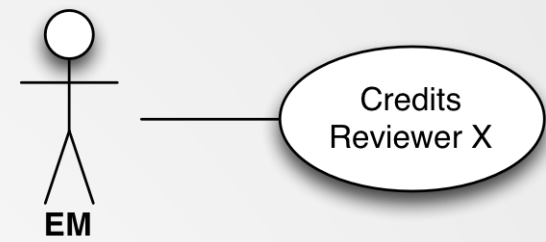
Cancel

Save & Submit Later

Upload Reviewer Attachments

Proof & Print

Proceed



Configuration: Review Form

Enable ORCID Review Deposit (Display Authorization Request)

[Edit Question](#)

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 interaction with ORCID on proceeding.

Instructions for ORCID Review Deposit

[Edit Instructions](#)

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.

Completion Date detail to send to ORCID: Year Only Year & Month Year, Month & Day

ORCID Review Type to cite as:

ORCID Reviewer Role to cite as:

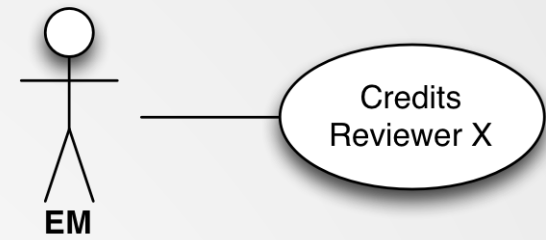
Only deposit Reviews given a Rating of or higher by any Editor

Only deposit Reviews that were submitted on time or up to day(s) late

Authorization to Transfer Review

[Edit Questions](#)

Display on



Configuration: Deposit Policy

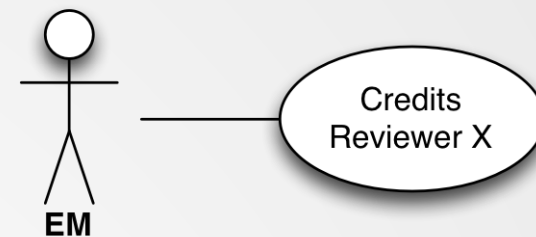
- You can choose to credit 1 review per submission, or all assignments
- You can choose a daily, weekly, N monthly schedule
- You can defer review deposit:
 - Until the author has been notified
 - Until the Final Disposition is set

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). This setting will be applied to incoming submissions and affects all of their subsequent Reviews.


- 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 Policy



Batch Review Deposit

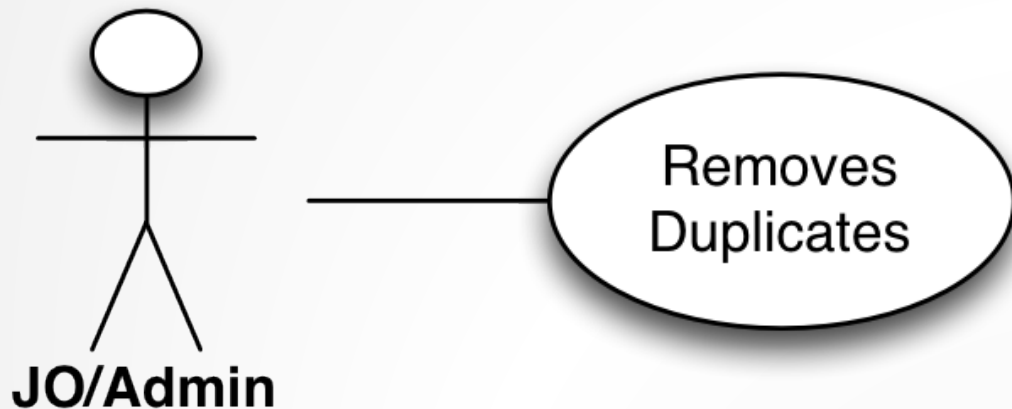
Choose the frequency of transfer for batches of Reviews to ORCID. Each batch will pick up all Reviews for which the Reviewer answered "Yes" to the ORCID Review Deposit Authorization question and which have not yet been deposited, subject to any further conditions defined below.

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

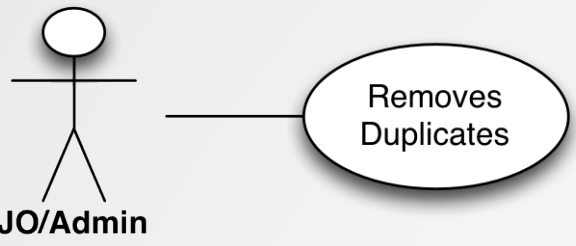
Choose when eligible Reviews should be considered ready to deposit: in the batch following their completion or in the batch after the associated submission reaches a specific milestone. If you configure a Rating condition below, Reviews will not be deposited before an Editor assigns a Review Rating.

- Deposit eligible Reviews 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

Admin: Database Cleanup (Ugh!)



- Journal office bugbear: cleaning up the database
- ORCID another item of metadata
- Authenticated ORCID can indicate active record
 - Special case: a non-Authenticated ORCID iD does not prevent retrieval of a duplicate *Authenticated* copy
- But EM can now use ORCID iDs to warn users of existing records
 - Reduce duplicates in the first place!



Search People - Search R

[Download Search Results](#)

Page: 1 of 1 (2 total People Matches)

Merge People	Name	City	State or Province	Country
<input checked="" type="checkbox"/>	Sandy Sandbox ^{KF}			UNITED STATES
<input checked="" type="checkbox"/>	Sandra Sandbox ^{KF}			UNITED STATES

Page: 1 of 1 (2 total People Matches)

[Merge People Records](#) [Download Search Results](#)

[Editor Main Menu](#)
[Production Tasks Menu](#)
[Production Status Grid](#)

Search People: Merge people records is the EM mechanism for removing duplicate records

Merge Duplicate Users - Verify Data

Please verify that the two people records you have selected are the records you want to merge. Then choose which people record will be retained, by clicking 'Combine and Keep this Record' in the appropriate box.

[Combine and Keep this Record](#)

[Sandy Sandbox \(SandyS\)](#)

UNITED STATES
sandbox@emtesting.co.uk

Personal Identifiers:
*ORCID: 0000-0001-6615-3438

Roles: Author
User has History? No
User has Current Assignments? No
User has Shared their Searches? No
People Record Last Update Date: 01/07/2017

Personal Classifications:
This user has no personal classifications

[Combine and Keep this Record](#)

[Combine and Keep this Record](#)

[Dr Sandra Sandbox \(Sandy\)](#)

UNITED STATES
sandys@emtesting.co.uk

Personal Identifiers:
ORCID:

Roles: Author
User has History? No
User has Current Assignments? No
User has Shared their Searches? No
People Record Last Update Date: 01/07/2017

Personal Classifications:
This user has no personal classifications

[Combine and Keep this Record](#)

Note the following things that occur when two people records are merged:

- Person assumes Username, Personal Classifications, and all Contact Information for the surviving record.
- The old address (e.g. possibly the address under which a manuscript was submitted) is no longer available for the person, and the surviving address is the address of record for all submissions under both people records.
- All history and current assignments are copied to the surviving record.

<p>sandbox@emtesting.co.uk</p> <p>Personal Identifiers: ORCID: 0000-0001-6615-3438</p> <p>Roles: Author</p>	<p>sandys@emtesting.co.uk</p> <p>Personal Identifiers: ORCID: 0000-0001-6615-3438 </p> <p>Roles: Author</p>
---	---

'Existing Person' Checks



Submits Manuscript

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 Authorize 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 a new record and authorize the return of your ORCID Identifier. You must do this unless you wish to change the designated Corresponding Author for this submission.

ORCID iD: (None)

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

[Next](#)

ORCID

Sandy Sandbox
http://sandbox.orcid.org/0000-0001-6615-3438

[\(Not You?\)](#)


Previous Registration Found

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.

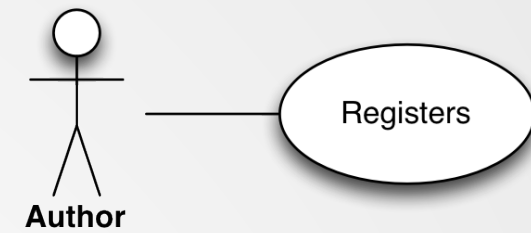
ORCID iD:	0000-0001-6615-3438 
Name:	Dr Sandra Sandbox
Institution:	Aries Systems
Country:	UNITED STATES
E-mail:	sandys@emtesting.co.uk
Registered:	Jan 07 2017 02:52PM

[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 Person' Checks



Choose a Registration Method Insert Special Character

Retrieve your details from the ORCID registry:

Use My ORCID Record

Or type in your

Given/First Name
Family/Last Name
E-mail Address

<http://sandbox>

ORCID iD Retrieved

ORCID iD match

Your ORCID iD is already registered with this publication

ORCID iD: 0000-0001-6615-3438
is linked to: Dr Sandra Sandbox
sandys@emtesting.co.uk

This means you can simply log in to this existing account.

Editorial Manager

has asked for the following access to your

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.](#)

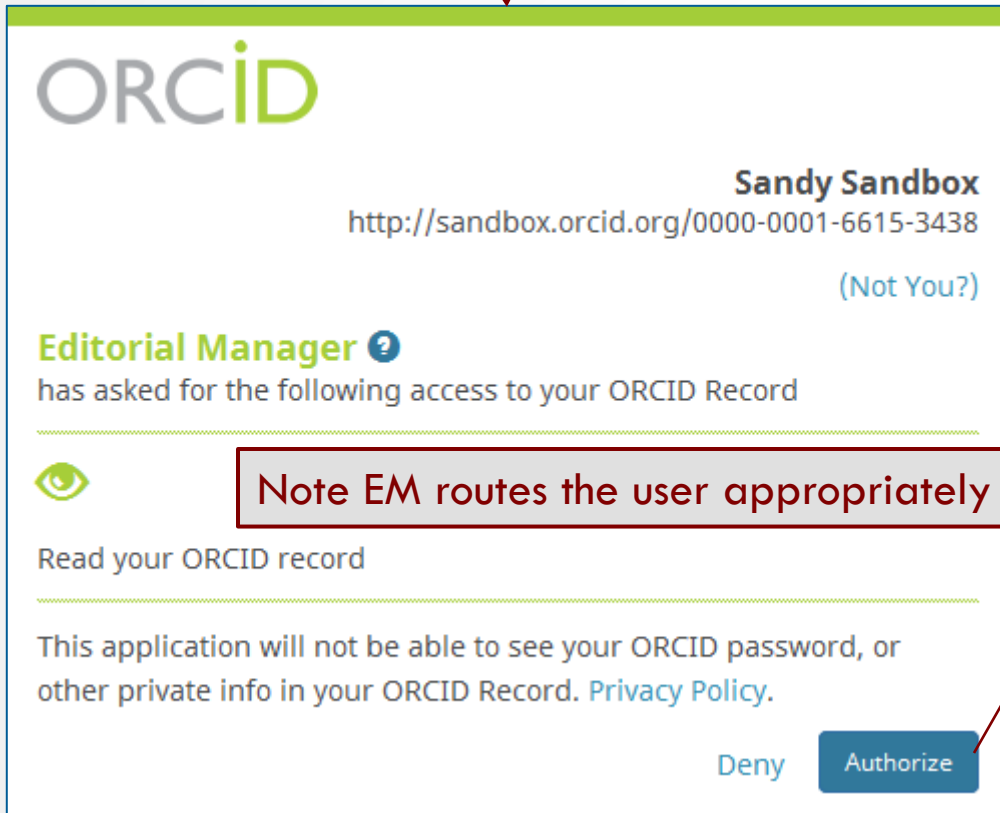
Had they registered with an ORCID, they would have found out even earlier – here the ORCID iD prevents an unnecessary registration



Establishes Identity


A new 'Register' link can be added to your Web site


[http://www.edmgr.com/\[JOURNAL_CODE\]/RegisterWithORCID.aspx](http://www.edmgr.com/[JOURNAL_CODE]/RegisterWithORCID.aspx)



ORCID

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

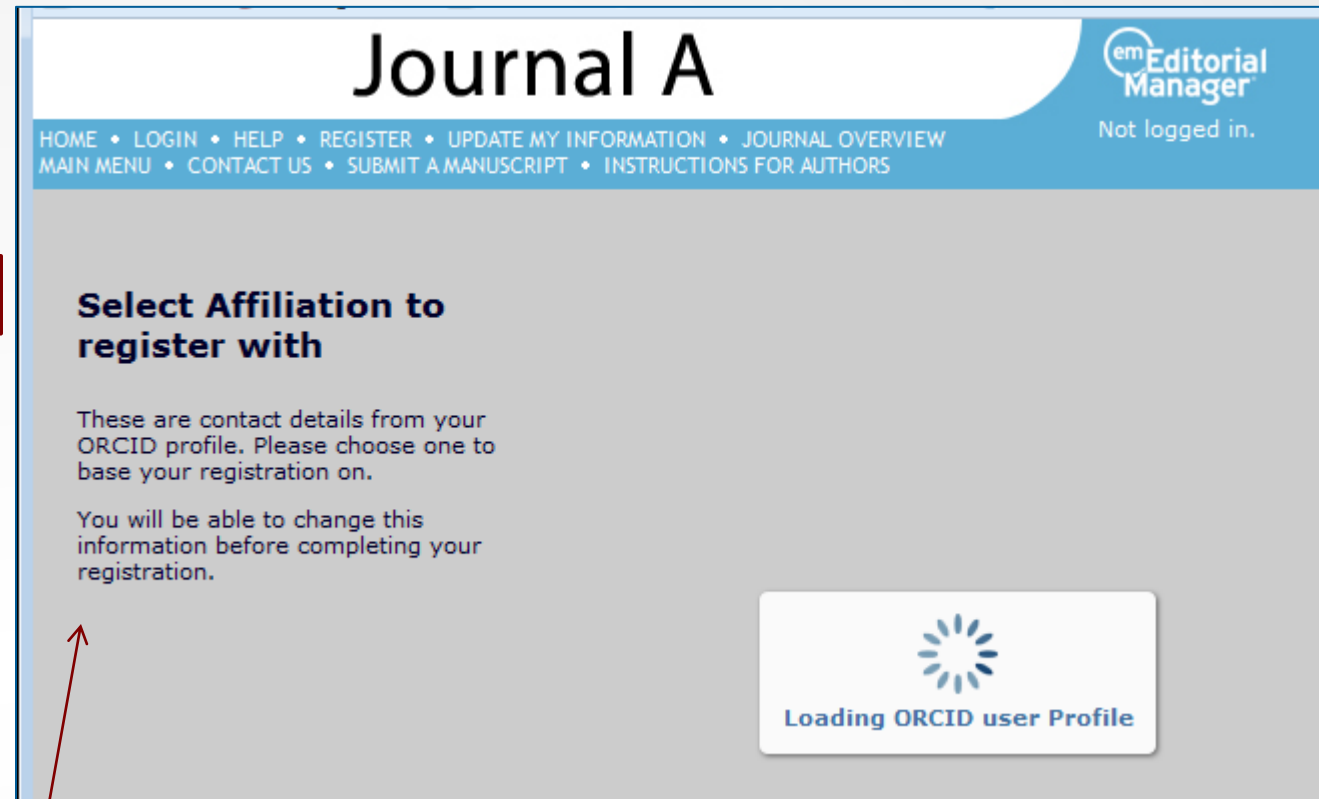
Editorial Manager 
 has asked for the following access to your ORCID Record

 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](#).

Deny

Note EM routes the user appropriately



Journal A

em Editorial Manager


Not logged in.

HOME • LOGIN • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
 MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Select Affiliation to register with

These are contact details from your ORCID profile. Please choose one to base your registration on.

You will be able to change this information before completing your registration.


 Loading ORCID user Profile



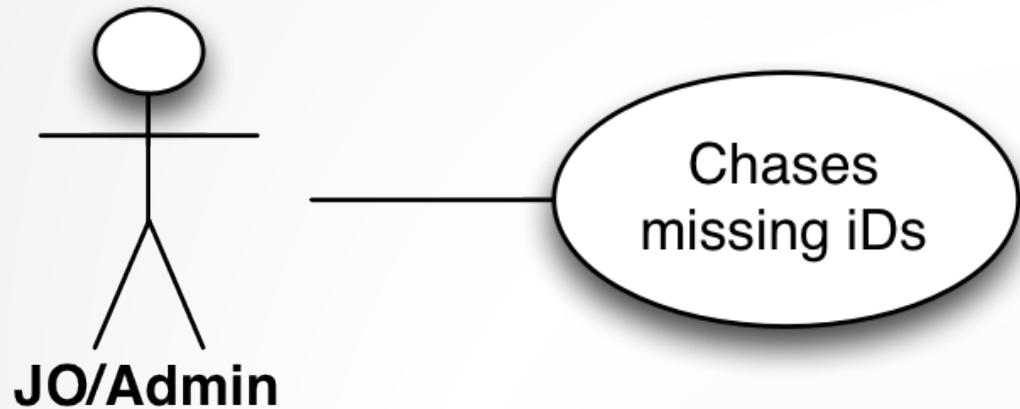
ORCID id match

Your ORCID id is already registered with this publication

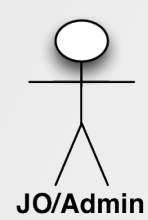
 ORCID id: **0000-0001-6615-3438**
 is linked to: Dr Sandra Sandbox
 sandys@emtesting.co.uk

This means you can simply log in to this existing account.

Admins: Chase ORCID IDs



- So it helps you for users to have ORCID iDs:
 - Public Profile
 - 'Already Registered' checks
 - May be required by publisher for authors
- Who gets to chase up?
 - Managing Editors/Journal Office. i.e. You.
- **Options?**
 - **Make Required!**
 - **Review Author status**
 - **Deep link for ORCID iDs**
 - **Make ORCID IDs useful**



Chases missing iDs

Author Details for Manuscript Number: Testing-D-2015-23 Example of a verification to get a lot of authors.

Close

Corresponding Author Status

Order	Author Name	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	John MP MacJohn	jmj-jxyz@emtesting.co.uk			asdasfsdf	View Author Details

Other Author Status

Order	Author Name	Added in Revision	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
▲▼	▲▼	▲▼				▲▼	▲▼	
2	Anne Authorillo	R0	annauthill@emtesting.co.uk Edit			Redbrick University	No Response	Resend Letter View Author Details
3	Paul Arino	R0	paularino@emtesting.co.uk Edit			Bighouse College	No Response	Resend Letter View Author Details
4	Jan Wary	R0	janwary@emtesting.co.uk Edit			Royal and Worshipful College of Heraldry	No Response	Resend Letter View Author Details
5	Pete Katchu	R0	petkat@emtesting.co.uk Edit			None at all	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](#)

The standard page for checking on the co-author verification status includes ORCID iD

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 give us access to retrieve it (if you do not register for one):

%ORCID_AUTHENTICATE_DEEP_LINK%

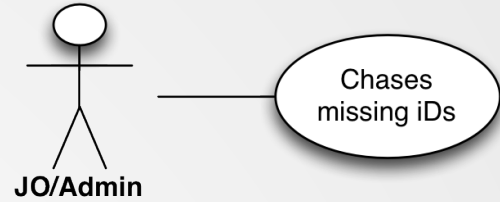
Best regards,
JXYZ Editorial Office

Insert System Merge Fields

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

Q ORCID x [Expand All](#) | [Collapse All](#)

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



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).

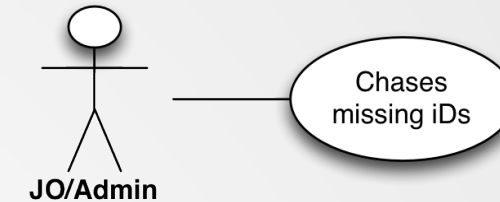
Your ORCID iD: 001-1234-5555-987X is already linked and Authenticated.

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



Configuration

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

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 that you test the changes in a separate HTML editing tool (e.g. Dreamweaver) and

- 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
- 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

Recommendations

- Enable ORCID SSO to encourage take-up
 - Required for login after 'Existing User' checks
- Education – e.g. automated Crossref update of their profile
- Do NOT enable ORCID iDs for Proxy-Registration by Editor
 - Expedited Reviewer Login & Reg
- Do NOT enable as Other Author fields
 - Use Co-Author Verification instead
- Enable ORCID registration fields
 - Optional or Required for Registration? Depends on your users
- 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
- Add new merge field to standard letters.
 - Ask users to supply their ORCID iDs if they see link instead of an ORCID iD

The End!