People Record Management

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Agenda

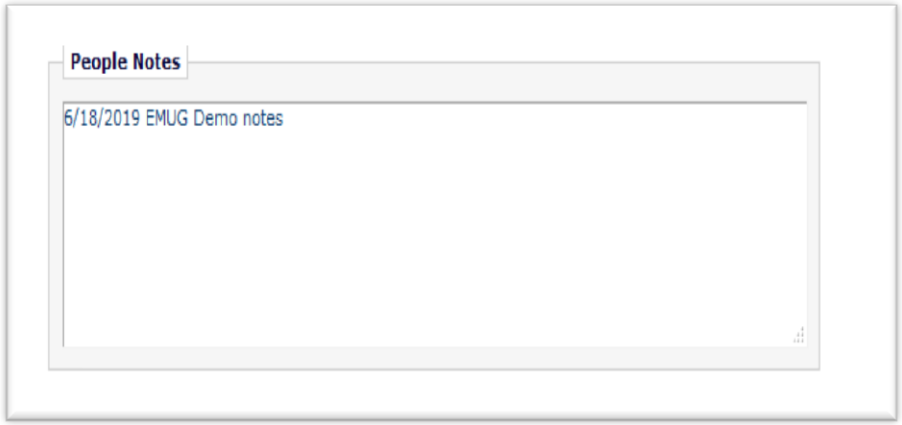
- Detailed People Notes
- People Flags
- Other Identifiers:
  - People URL's
  - Privacy Policy Acknowledgement
  - ORCID (& other ID's)
- Extend Additional People Details (APD's) Functionality

COMING SOON!

Detailed People Notes

Currently available in EM

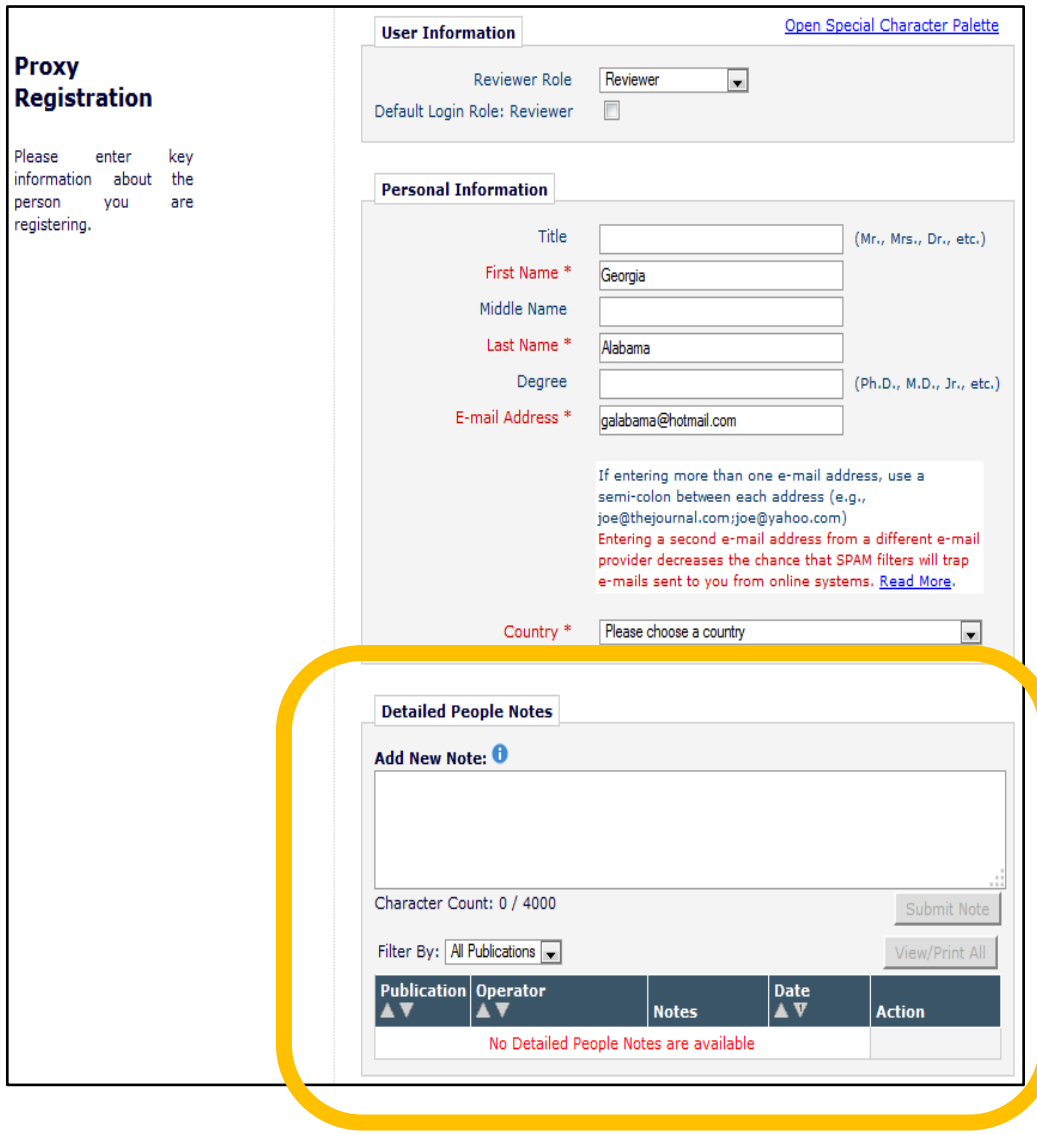
Current People Notes vs. Detailed People Notes

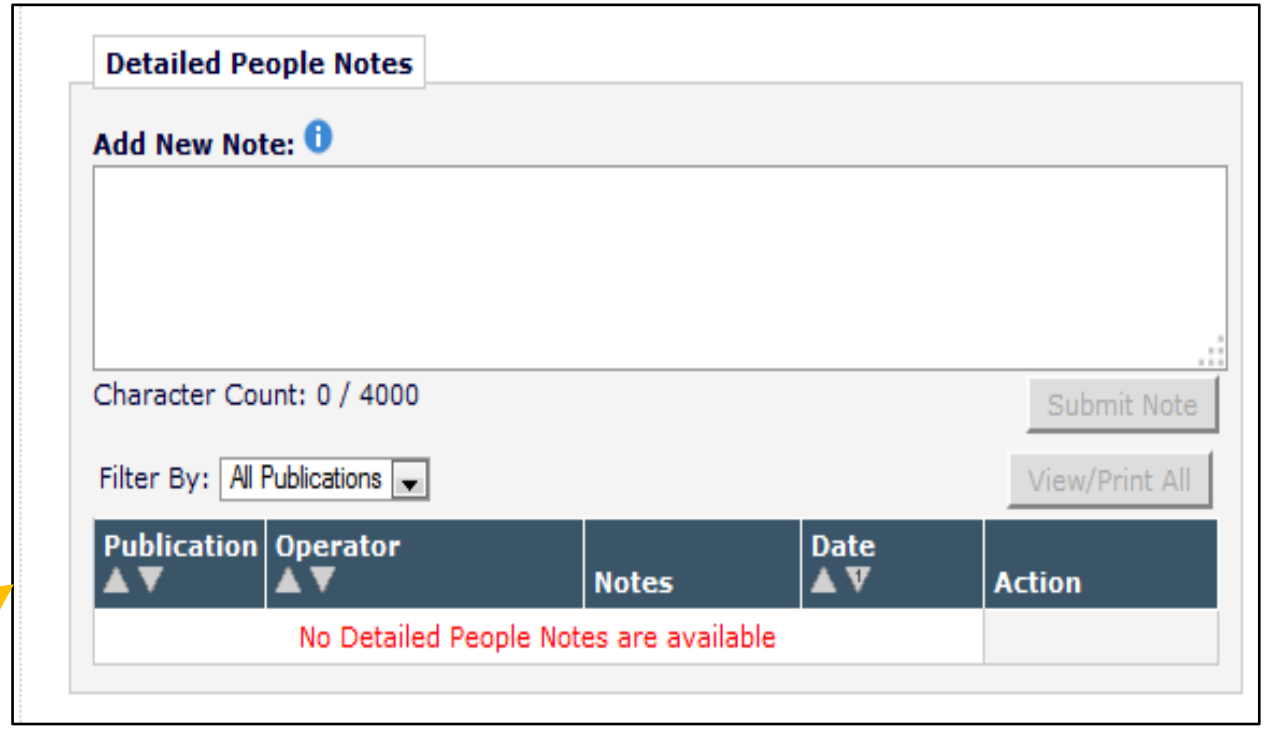


Detailed People Notes - Highlights

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

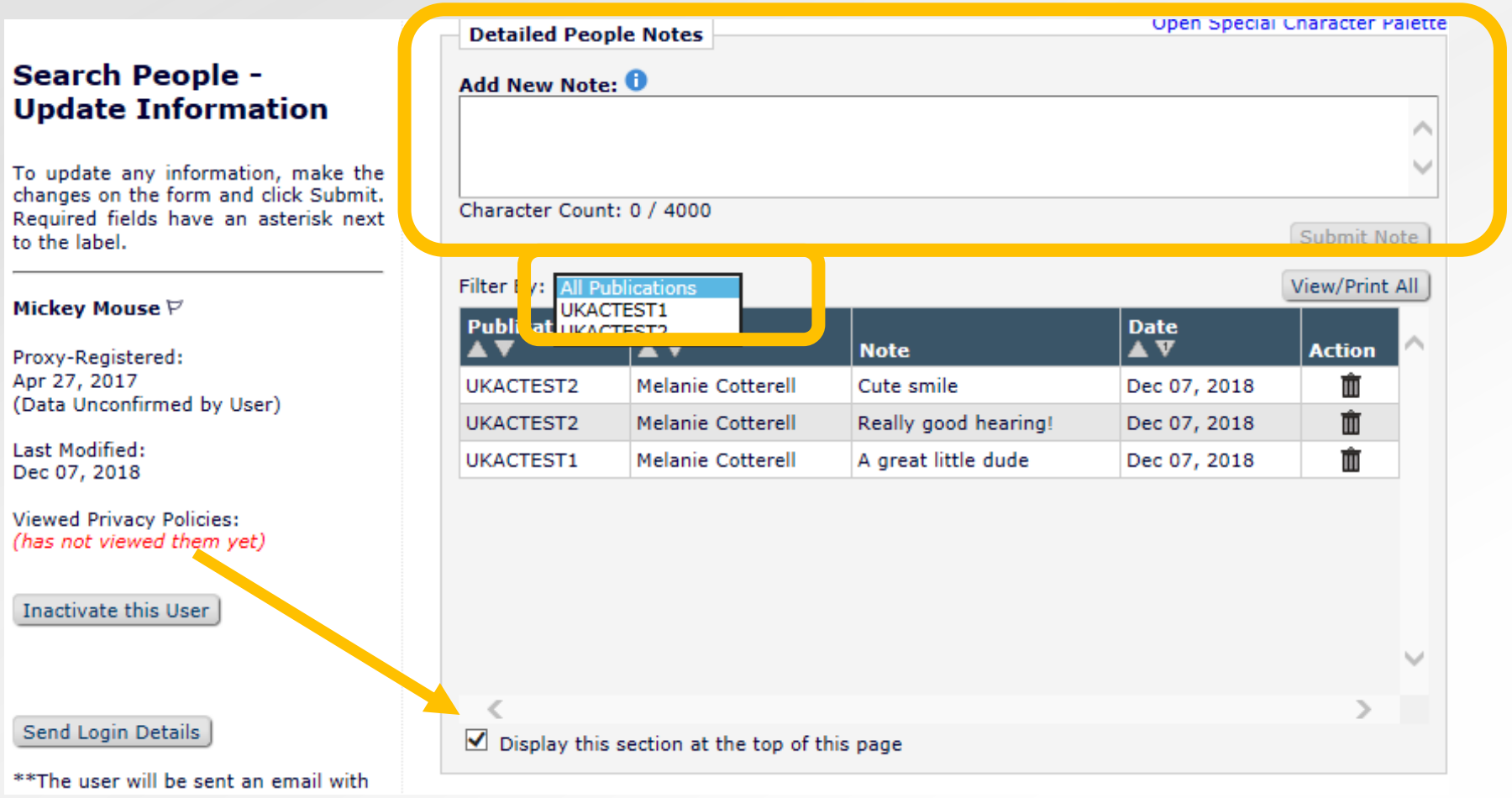
Can be entered on Proxy Registration





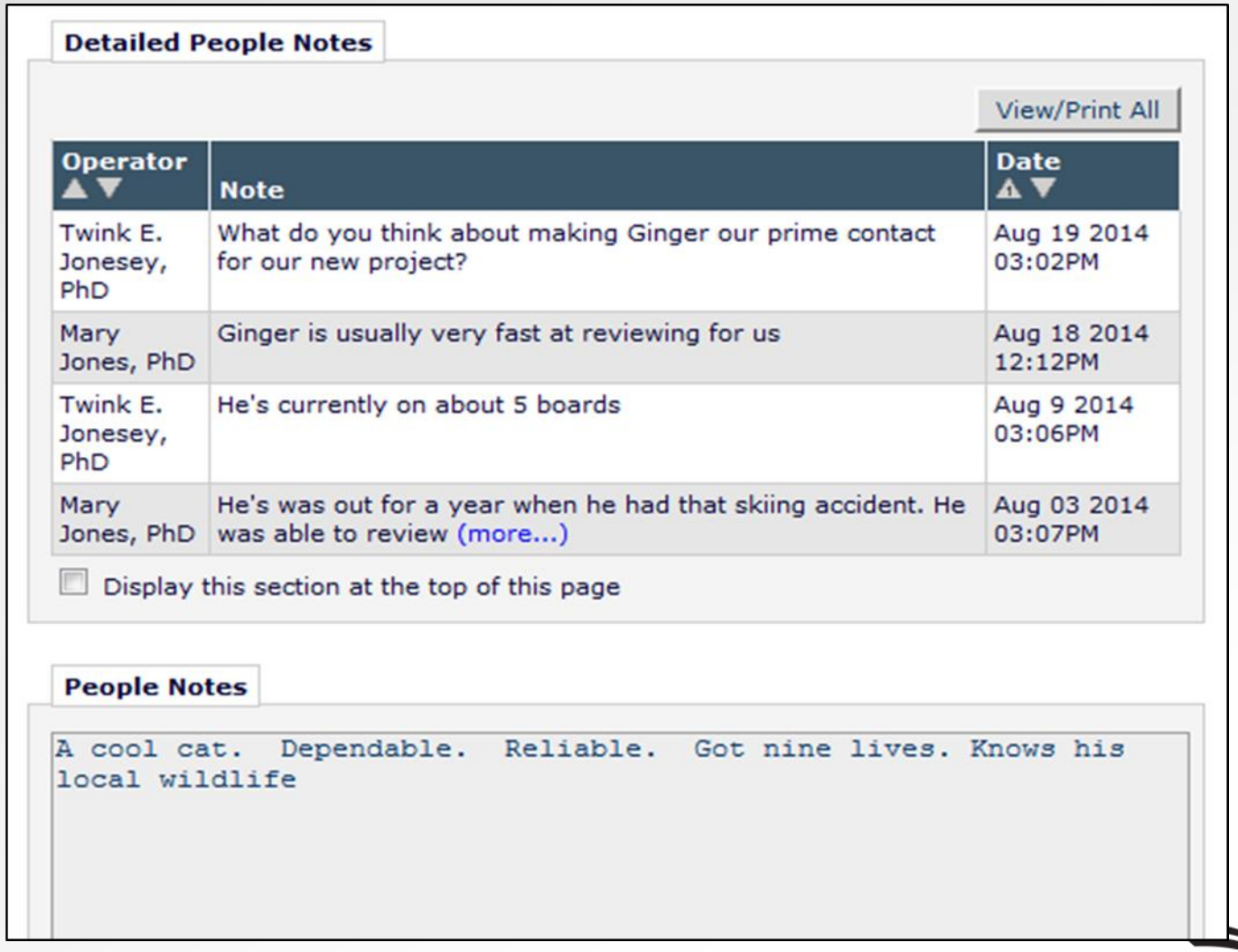
Displayed on Search People – Update Information page

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



Displayed on Search People – Update Information page

- This example is Editor with permission to View only



Detailed People Notes

View/Print All

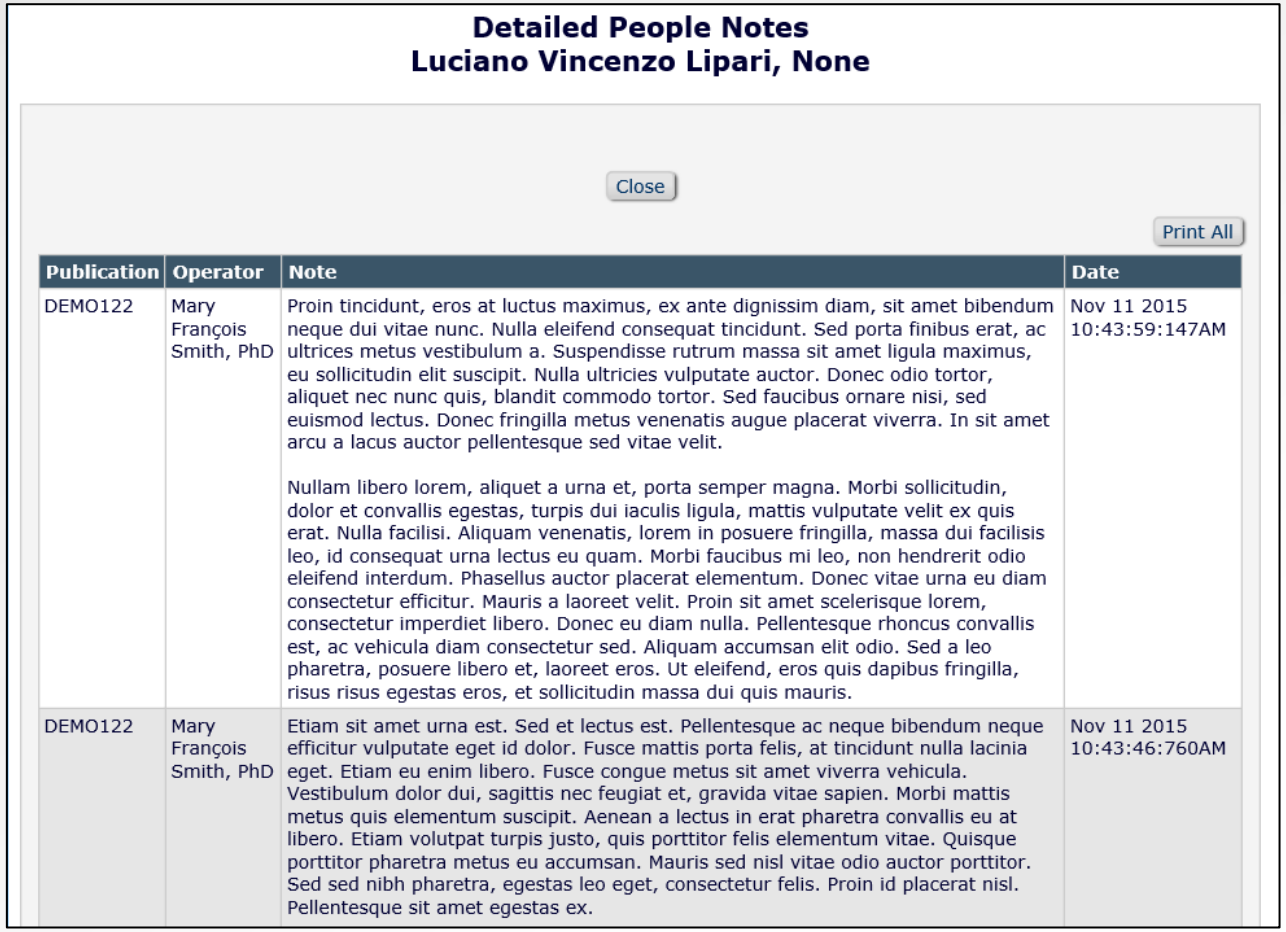
Operator	Note	Date
Twink E. Jonesey, PhD	What do you think about making Ginger our prime contact for our new project?	Aug 19 2014 03:02PM
Mary Jones, PhD	Ginger is usually very fast at reviewing for us	Aug 18 2014 12:12PM
Twink E. Jonesey, PhD	He's currently on about 5 boards	Aug 9 2014 03:06PM
Mary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

Display this section at the top of this page

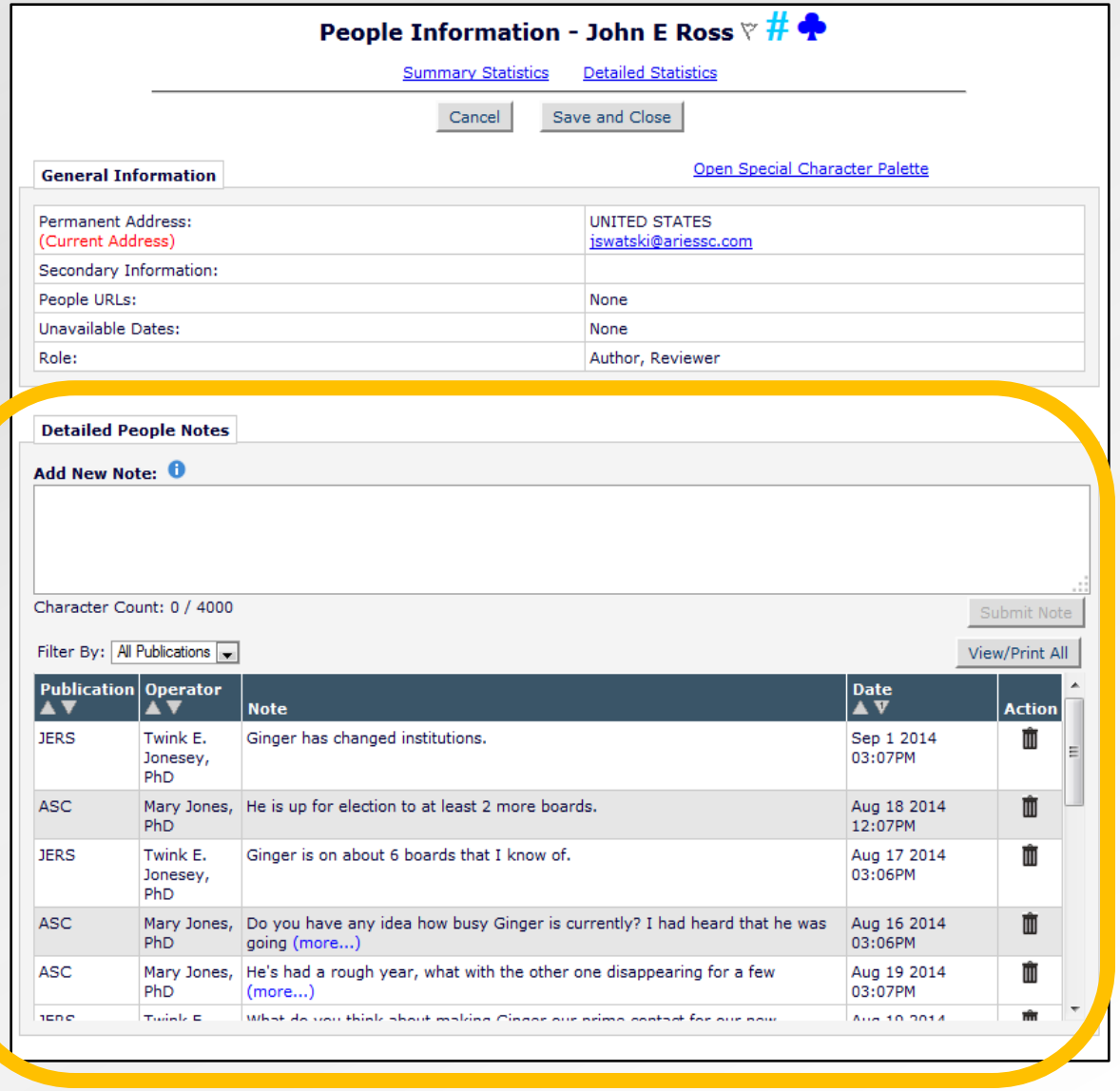
People Notes

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

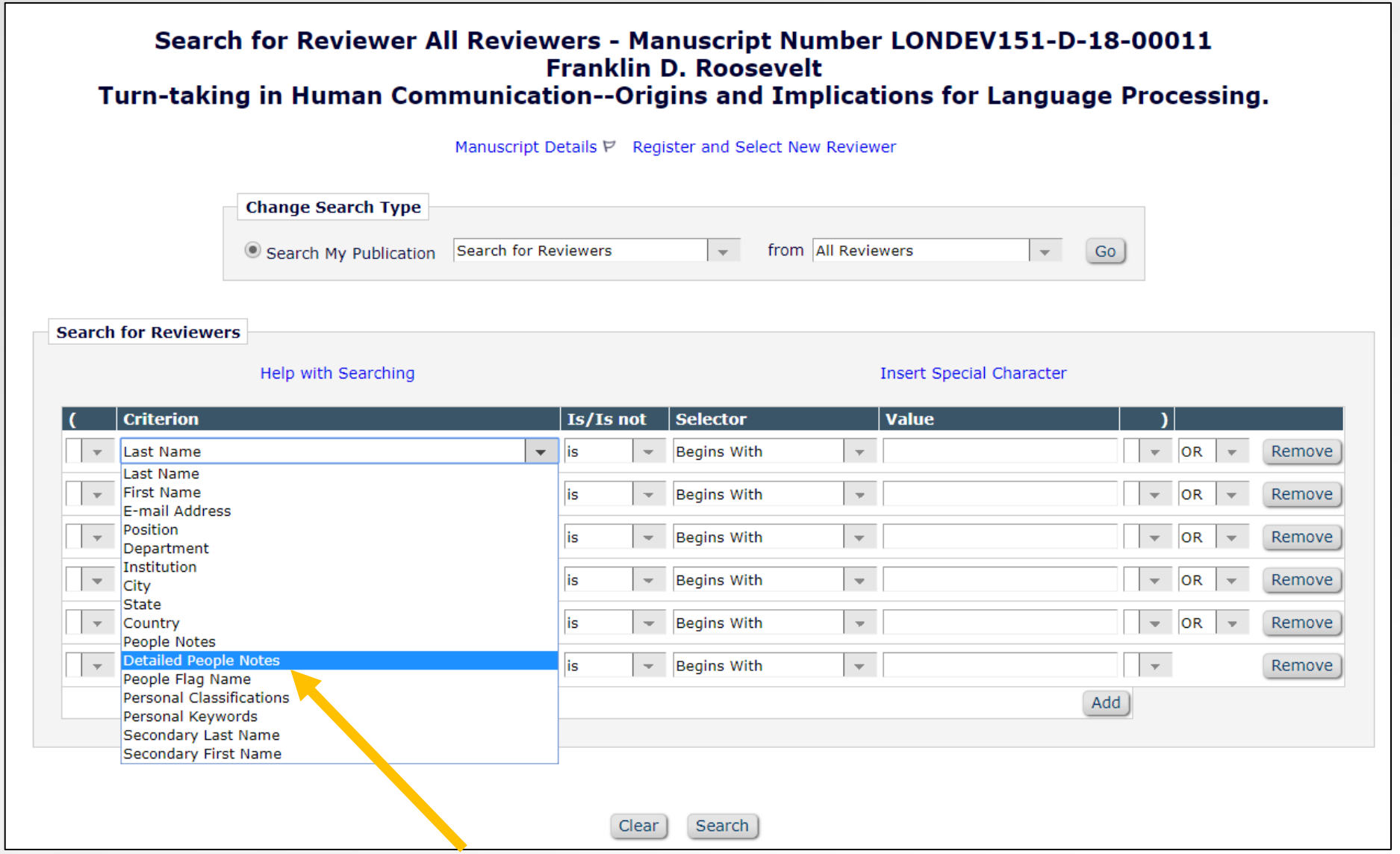
View/Print All Detailed People Notes



Displayed on People Information Page

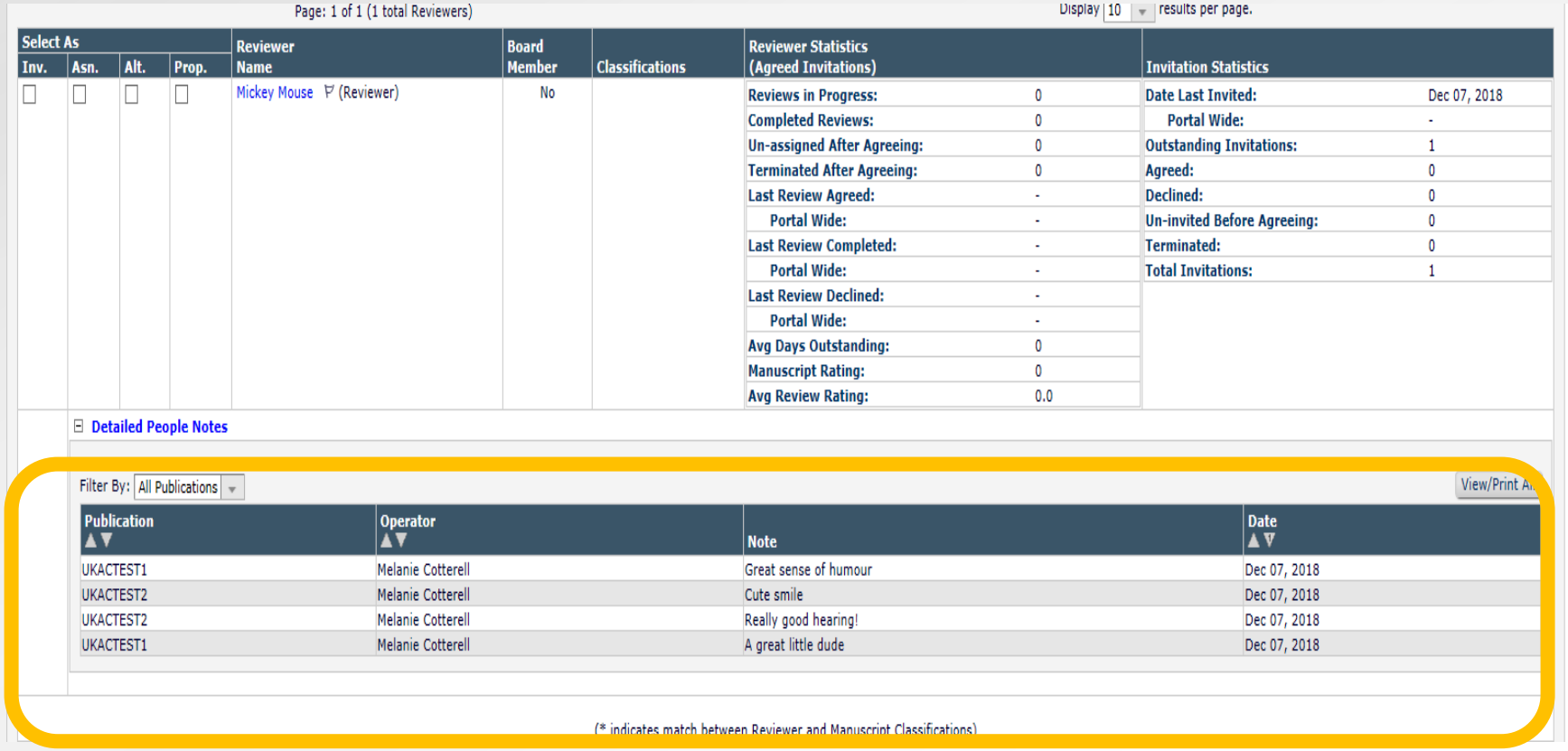


Searchable – Reviewer Search



Displayed in Reviewer Search Results

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



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

Select As Inv.	Asn.	Alt.	Prop.	Reviewer Name	Board Member	Classifications
☐	☐	☐	☐	Mickey Mouse (Reviewer)	No	

Reviewer Statistics (Agreed Invitations)	
Reviews in Progress:	0
Completed Reviews:	0
Un-assigned After Agreeing:	0
Terminated After Agreeing:	0
Last Review Agreed:	-
Portal Wide:	-
Last Review Completed:	-
Portal Wide:	-
Last Review Declined:	-
Portal Wide:	-
Avg Days Outstanding:	0
Manuscript Rating:	0
Avg Review Rating:	0.0

Invitation Statistics	
Date Last Invited:	Dec 07, 2018
Portal Wide:	-
Outstanding Invitations:	1
Agreed:	0
Declined:	0
Un-invited Before Agreeing:	0
Terminated:	0
Total Invitations:	1

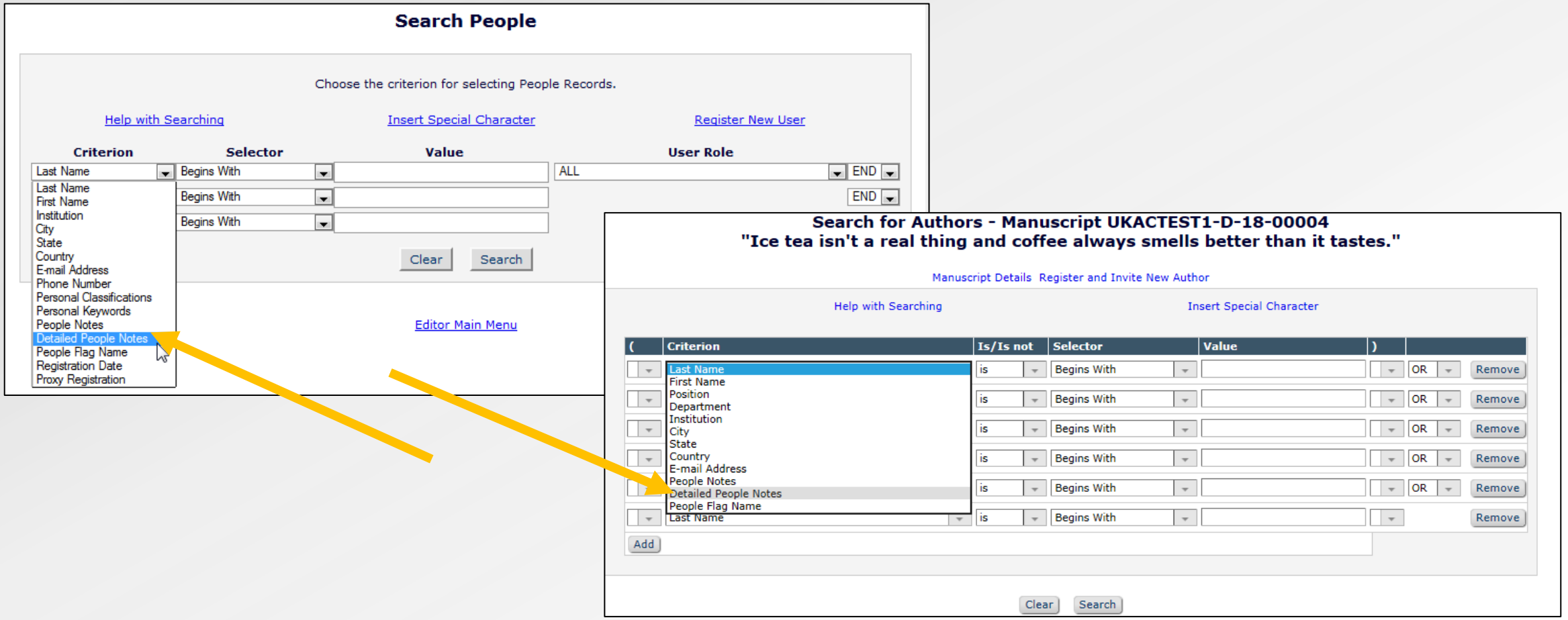
Detailed People Notes

Filter By: All Publications View/Print A

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

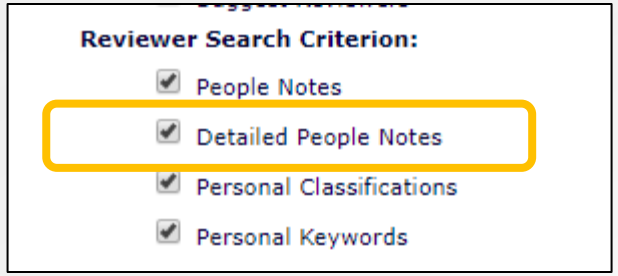
(* indicates match between Reviewer and Manuscript Classifications)

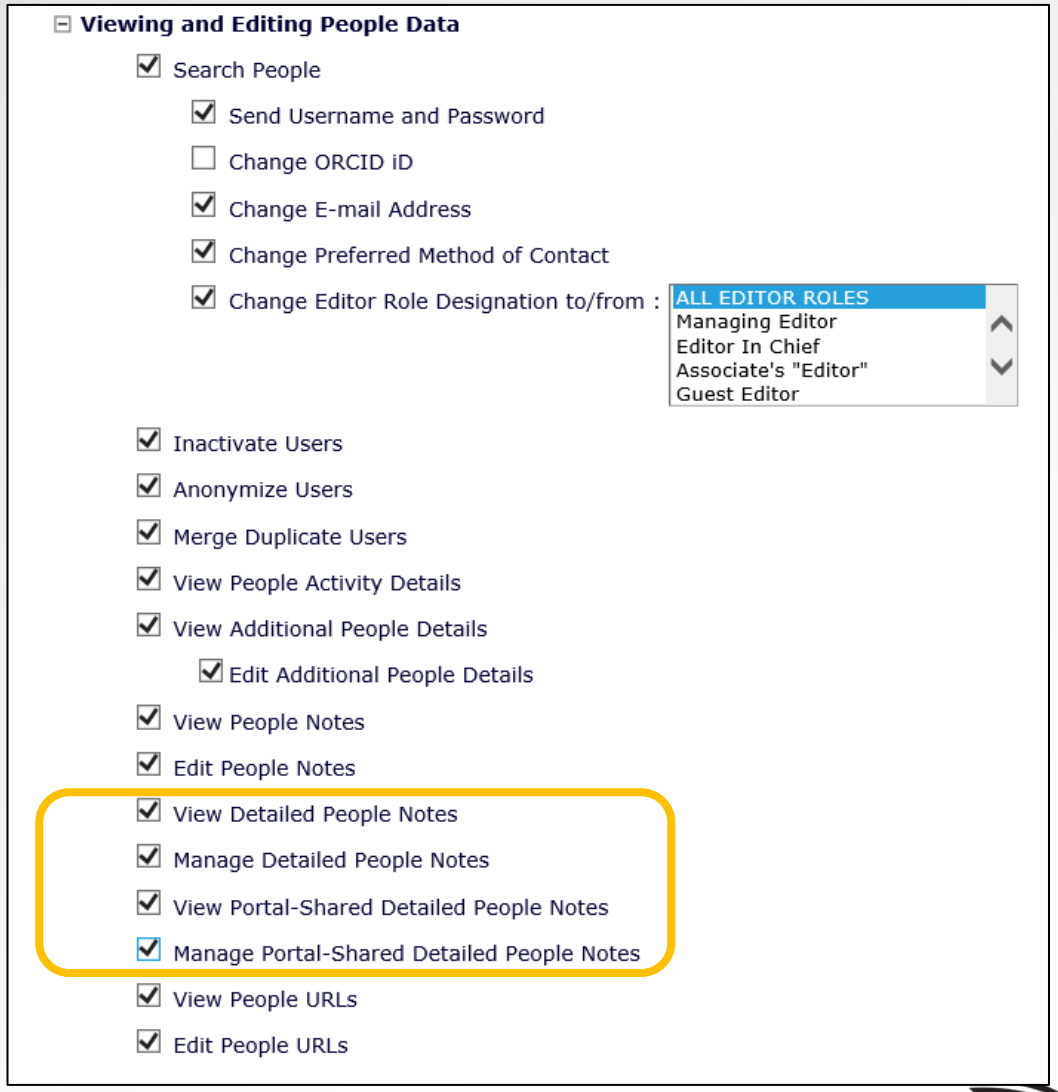
Searchable – Search People and Search for Authors



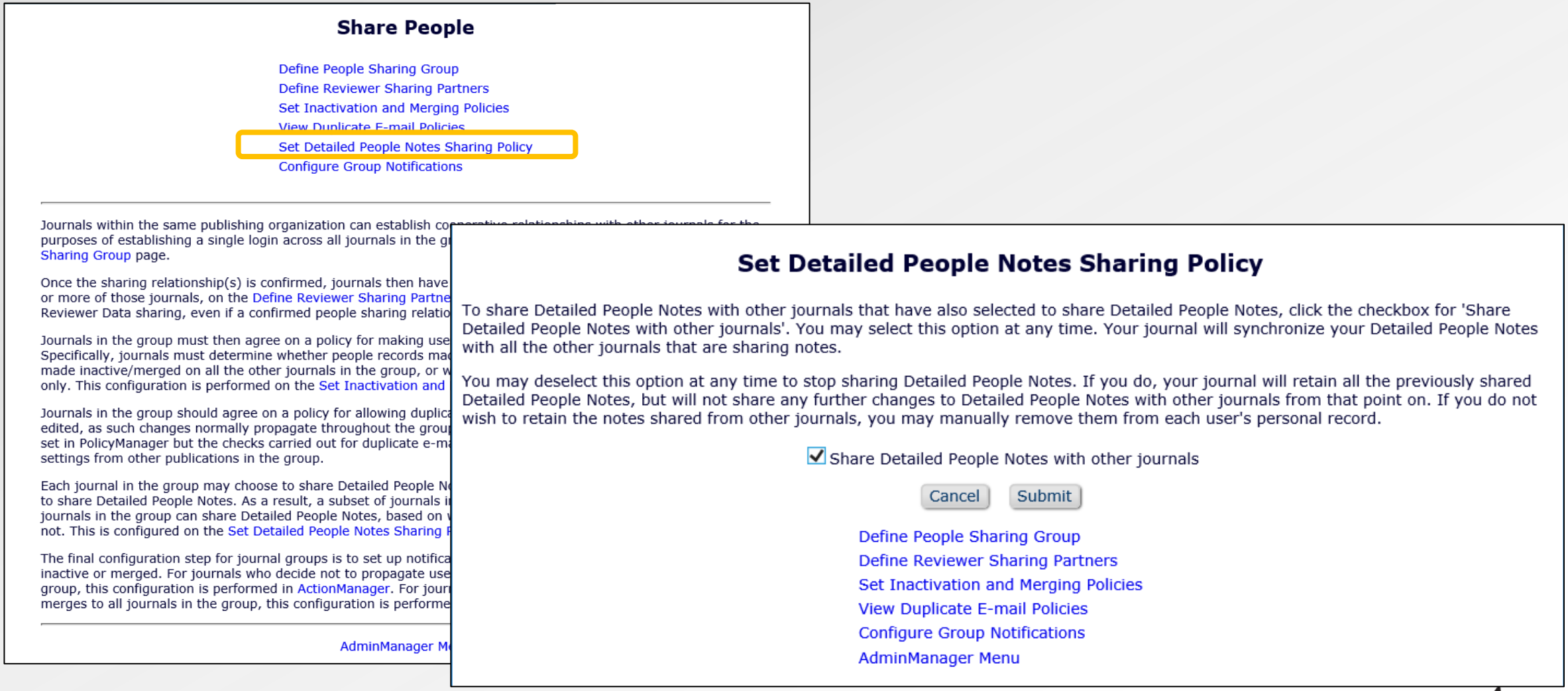
Configuration - Editor RoleManager Permissions

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





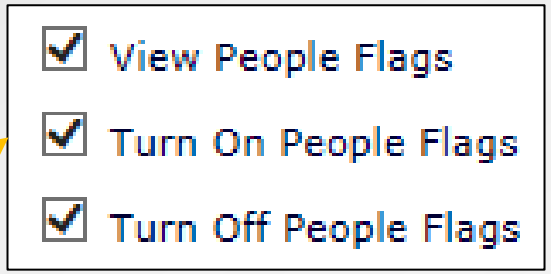
Configuration - Share Notes Across Journals

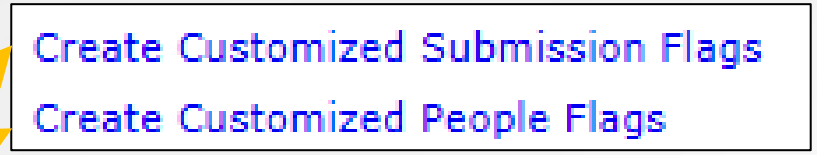


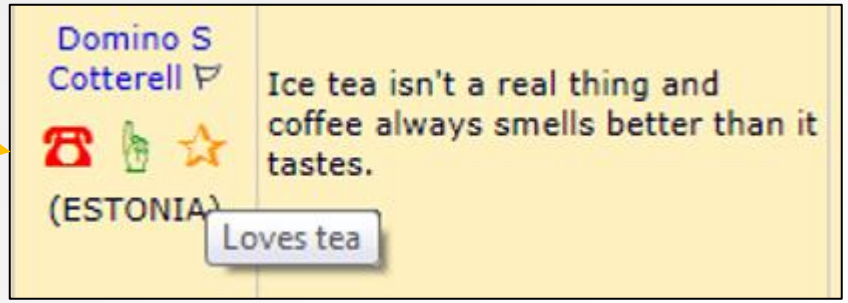
People Flags

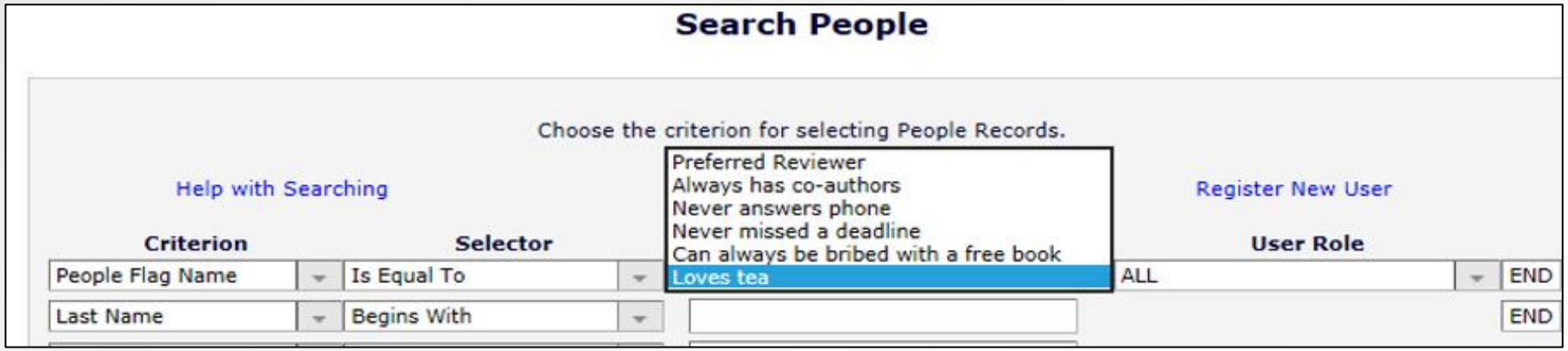
People Flags

- People Flags are permission controlled in Role Manager
- Only visible to editor/publisher roles
- Extensive palette of flags shared with Submission Flags
- Customizable description shows on hover
- Displays in various folders
- Criteria in Search People/Invite Reviewer/Invite Author



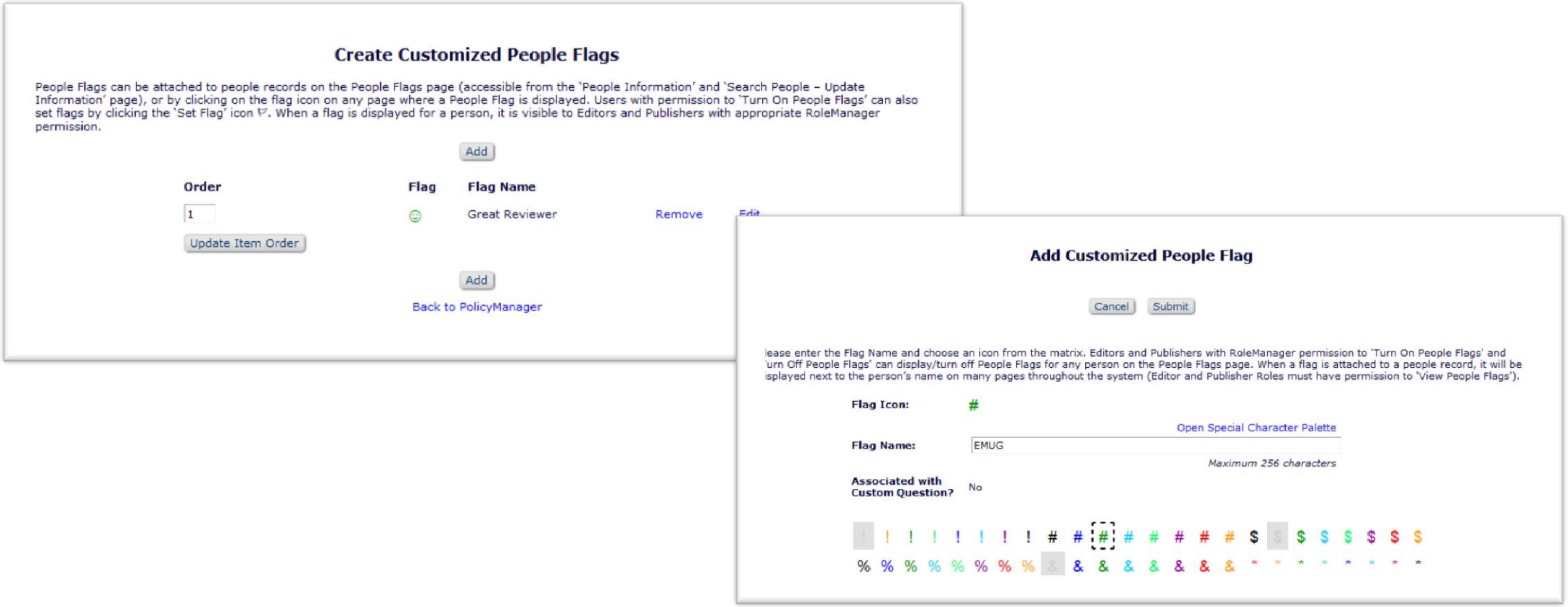




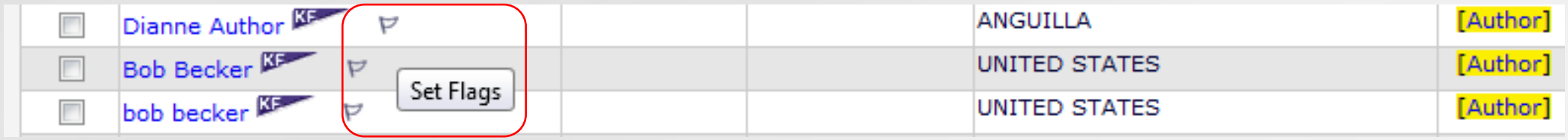


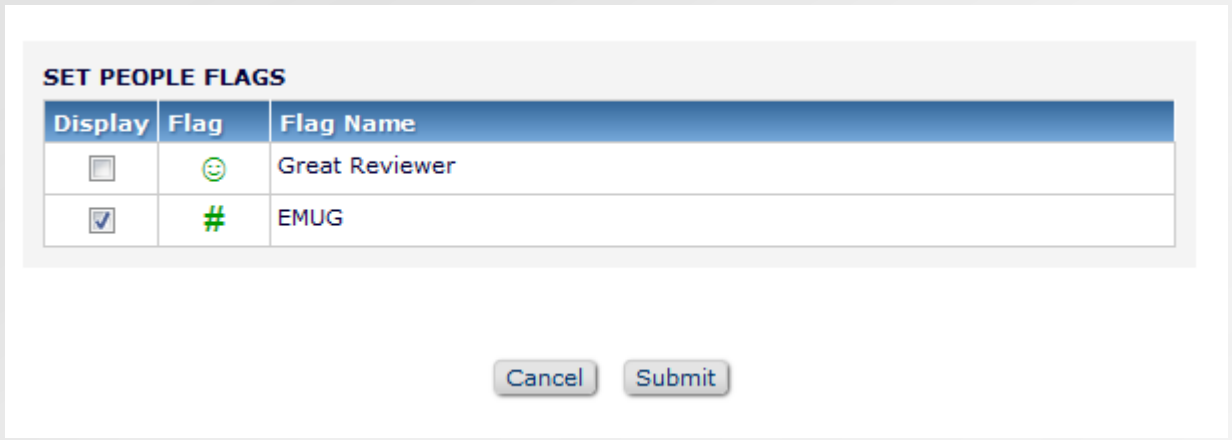
Creating Customized People Flags

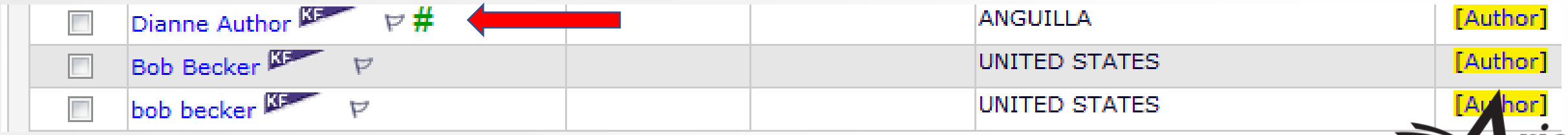
- Policy Manager
  - General Policies
    - Create customized people flags



Adding Flags to People Records





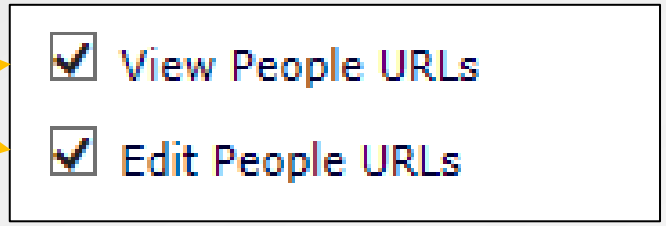


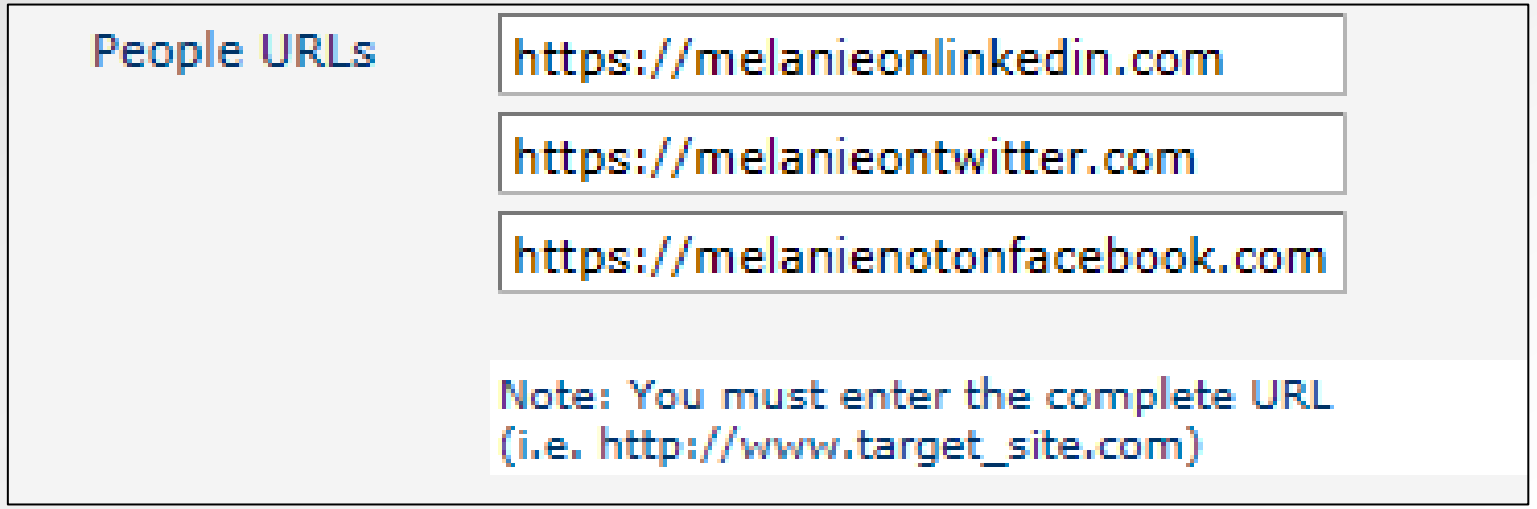
Other Identifiers

- People URL's
- Privacy Policy Acknowledgment
- ORCID (& other ID's)

People URL's

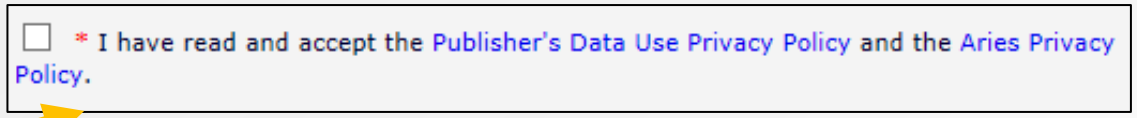
- Permission controlled in Role Manager
- Visible on user record through Search People
- Example uses: Social media, Faculty/Company webpages, Professional networks et cetera

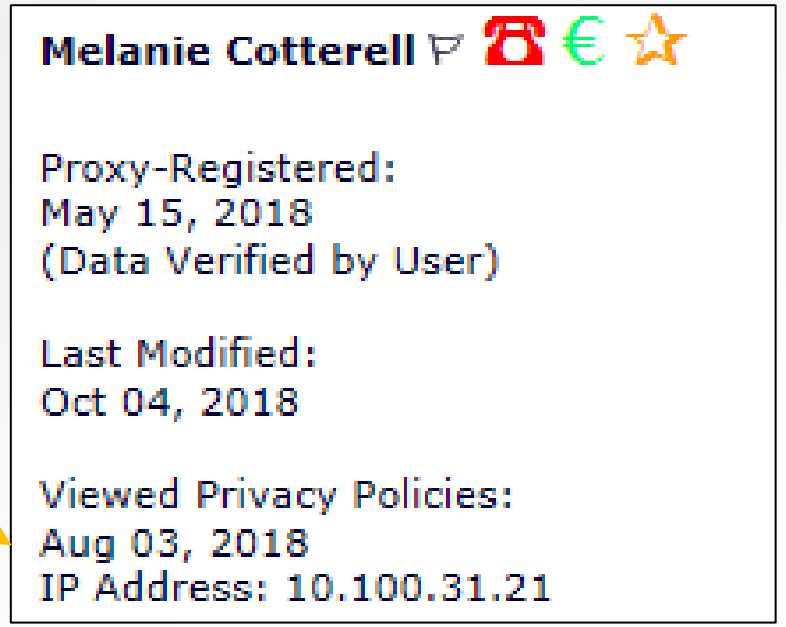




Privacy Policy Acknowledgement

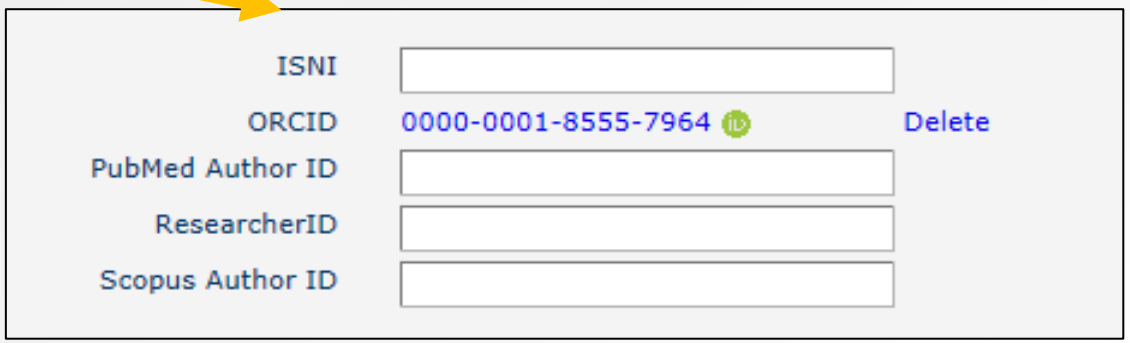
- Since GDPR came into force in May 2018:
  - We have added a link to your privacy policy/journal overview page to login box
  - All Users logging into EM sites since the change, are required to acknowledge both policies as a required registration question
  - We record the date, time and IP Address in use when the question is answered, this can be seen on User records through Search People
  - Other GDPR related changes can be found by searching for GDPR in Help





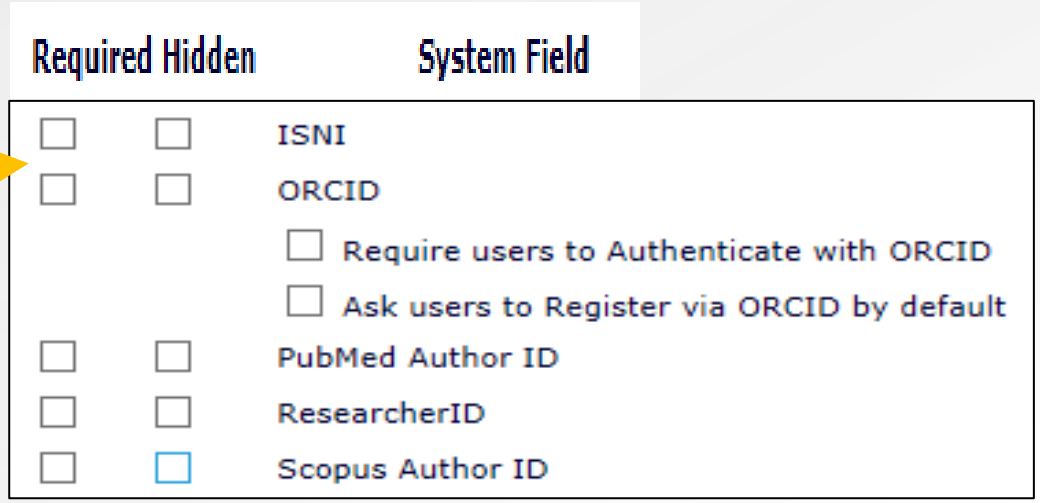
ORCID & Other Personal ID's

- Can collect ISNI, PubMed Author ID, ResearcherID, Scopus Author ID
  - Configure as Optional/Required Registration field for Users
  - Also shows on Update My Information
  - Text Entry
- ORCID – further integration
  - Authentication
  - SSO login
  - Requirement for Submission
  - Reviewer Peer Review Deposit – Contact your Account Coordinator



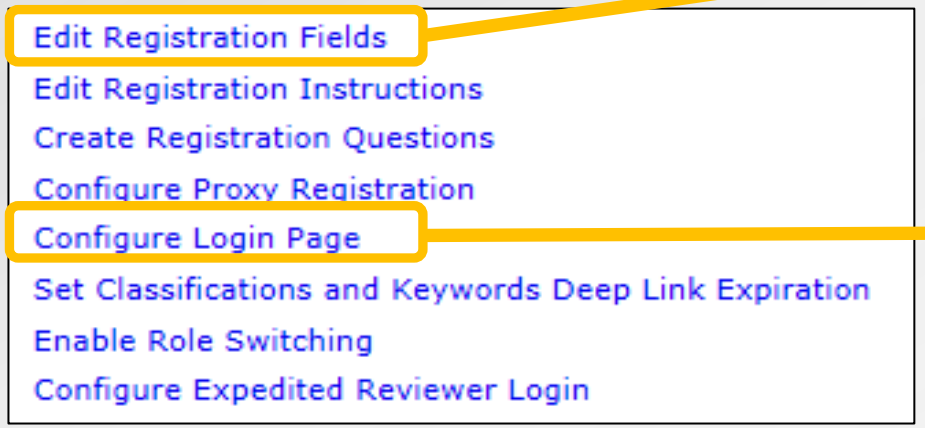
ORCID & Other Personal ID's

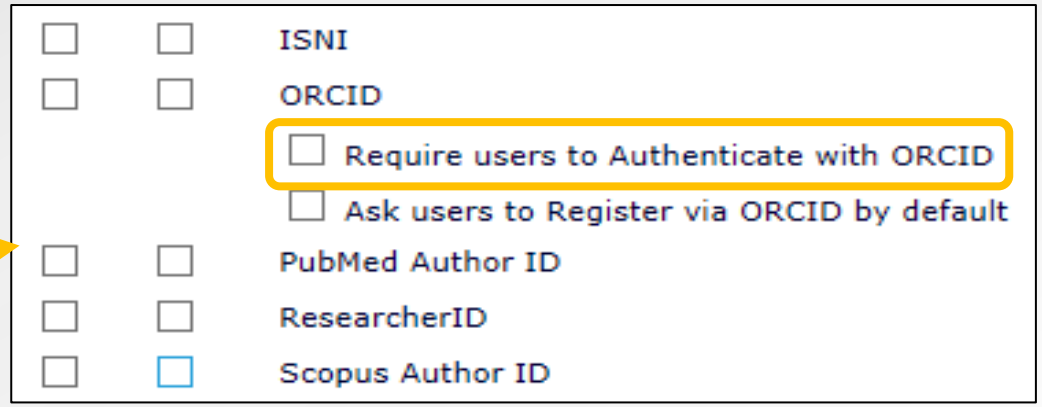
- Configure as Optional/Required Registration field for Users in Policy Manager
- Other methods of Registration:

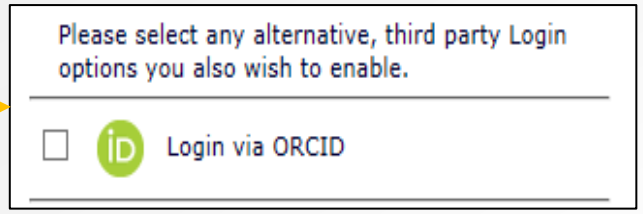


ORCID - Authentication & Login

- ORCID – further integration
  - Authentication
  - SSO Login



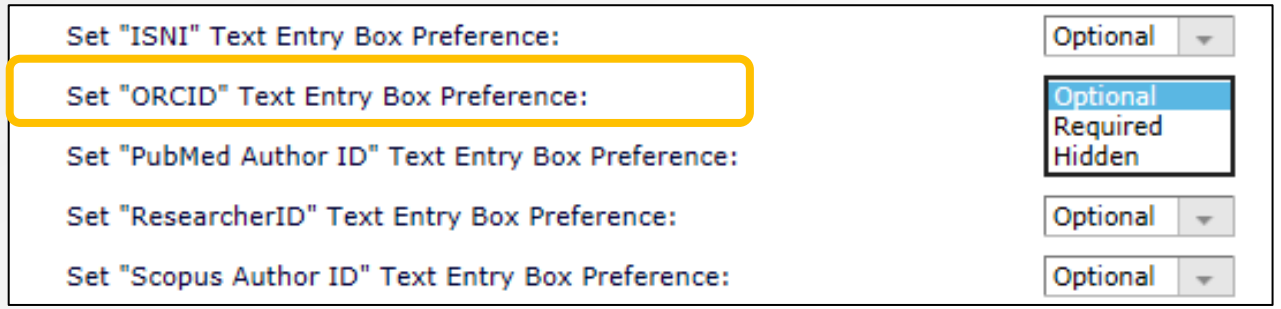




ORCID – Co-Authors, Submission and Permission

- ORCID – further integration
  - Requirement for Submission
  - Collect for Co-Authors

- Role Manager Permission for Change/Removal/Edit:



ORCID – Authenticated ORCID Direct link

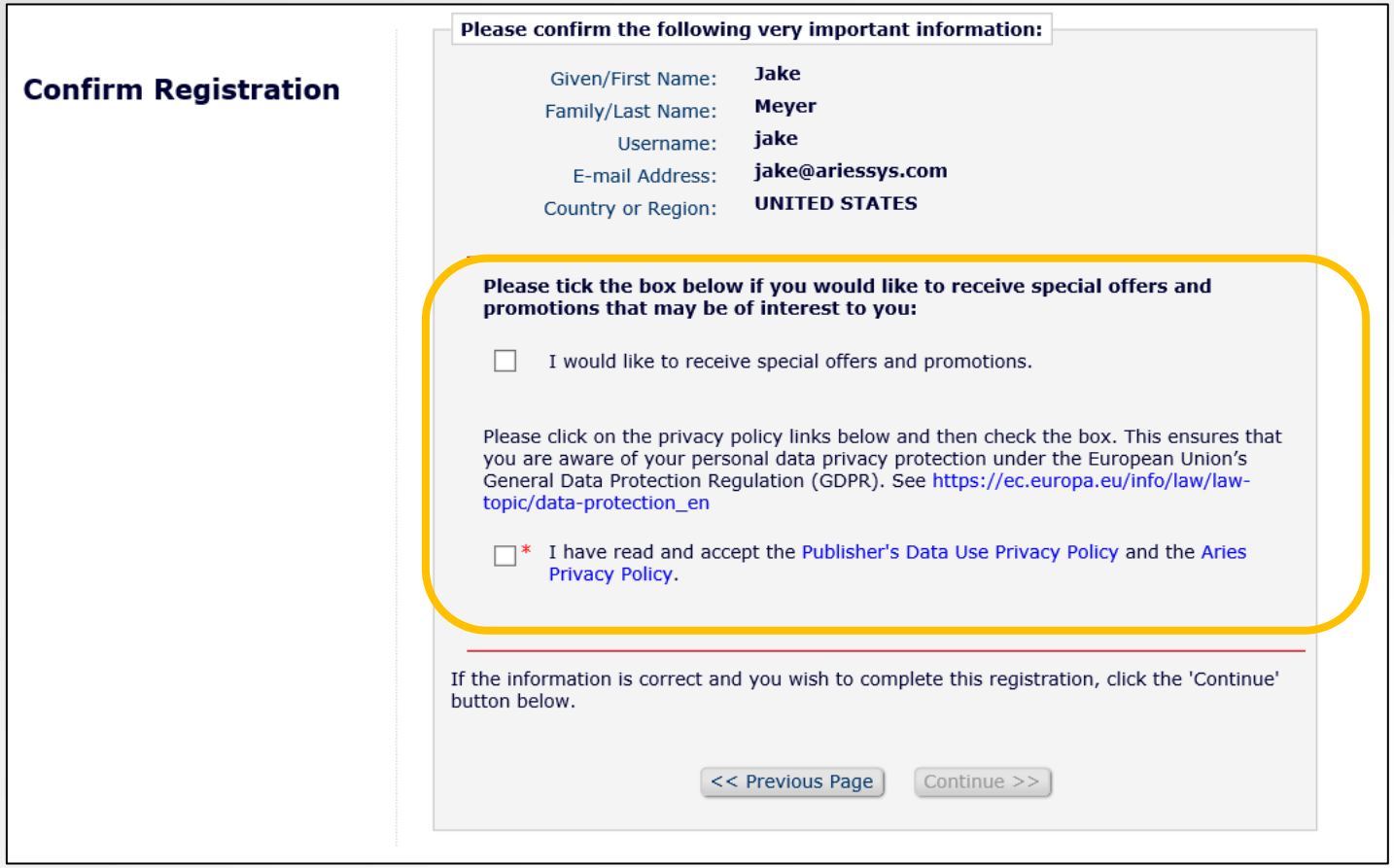
Extend Additional People Details (APD's) Functionality

- Use APD's as Registration Questions
- Conceal APD's from certain Editor roles
- Display APD's on additional pages

- *Coming in 16.0 and Subject to Change!*

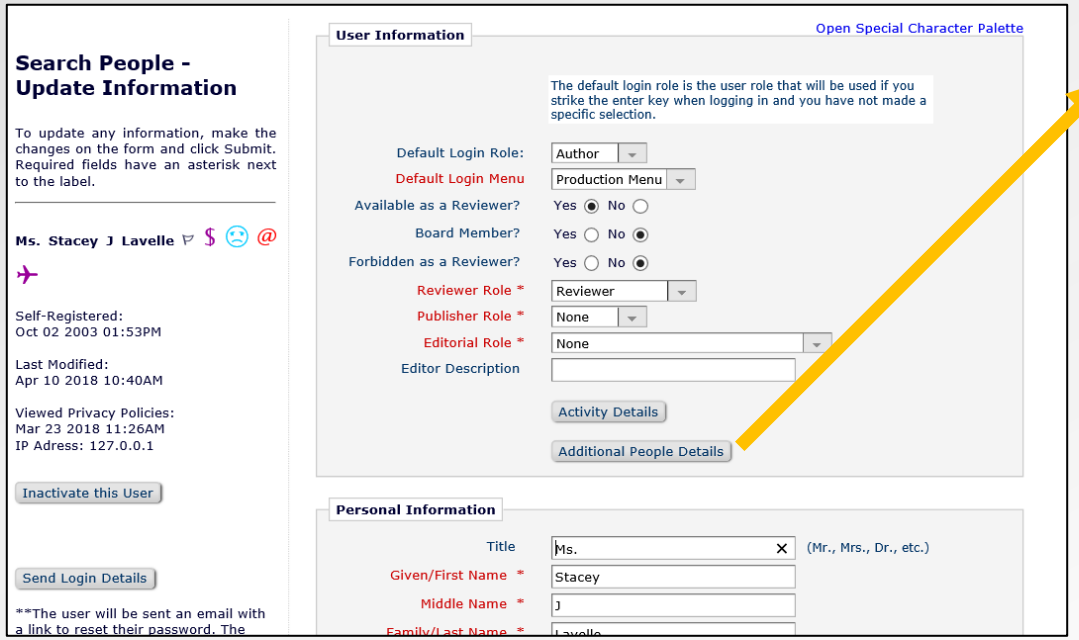
Current Functionality: Registration Questions

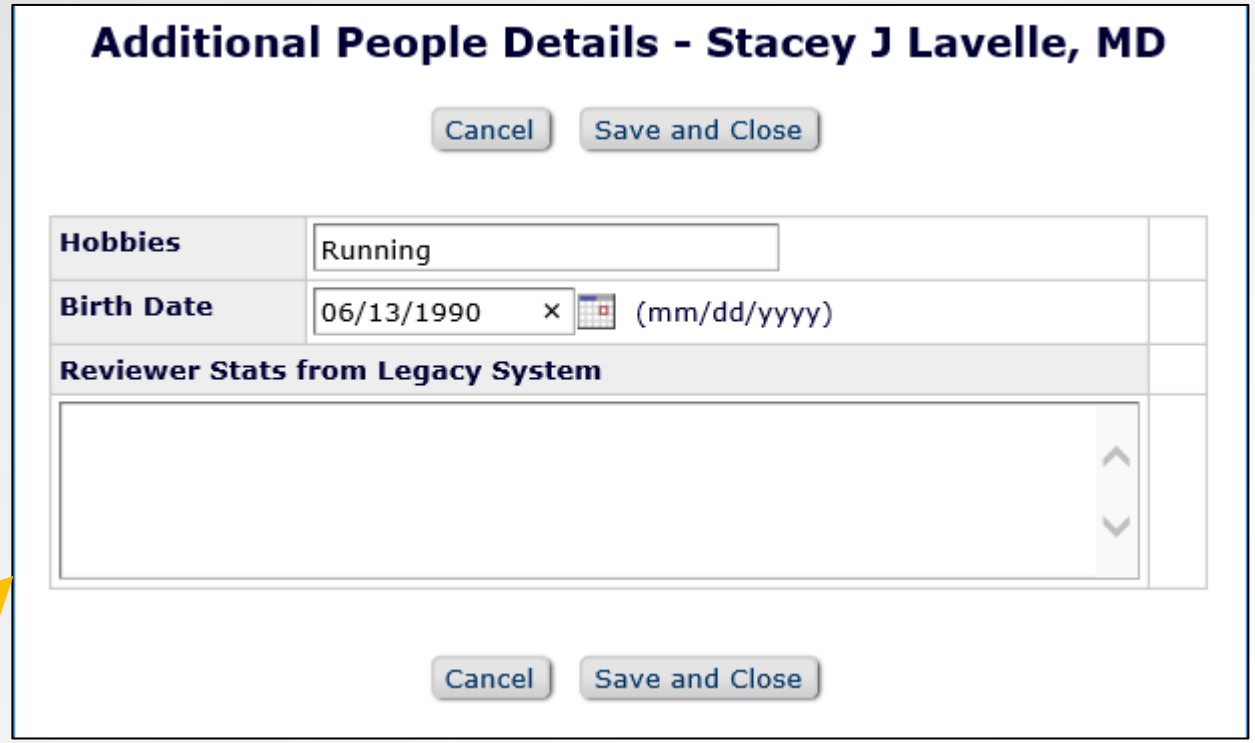
- Currently, Registration Questions or Statements can appear whenever a new user registers or when an existing user logs into the system.
- Registration Question/Statement responses are a single checkbox, where the user either ticks or does not tick the box
- For GDPR the user is required to tick the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



Current Functionality: APDs

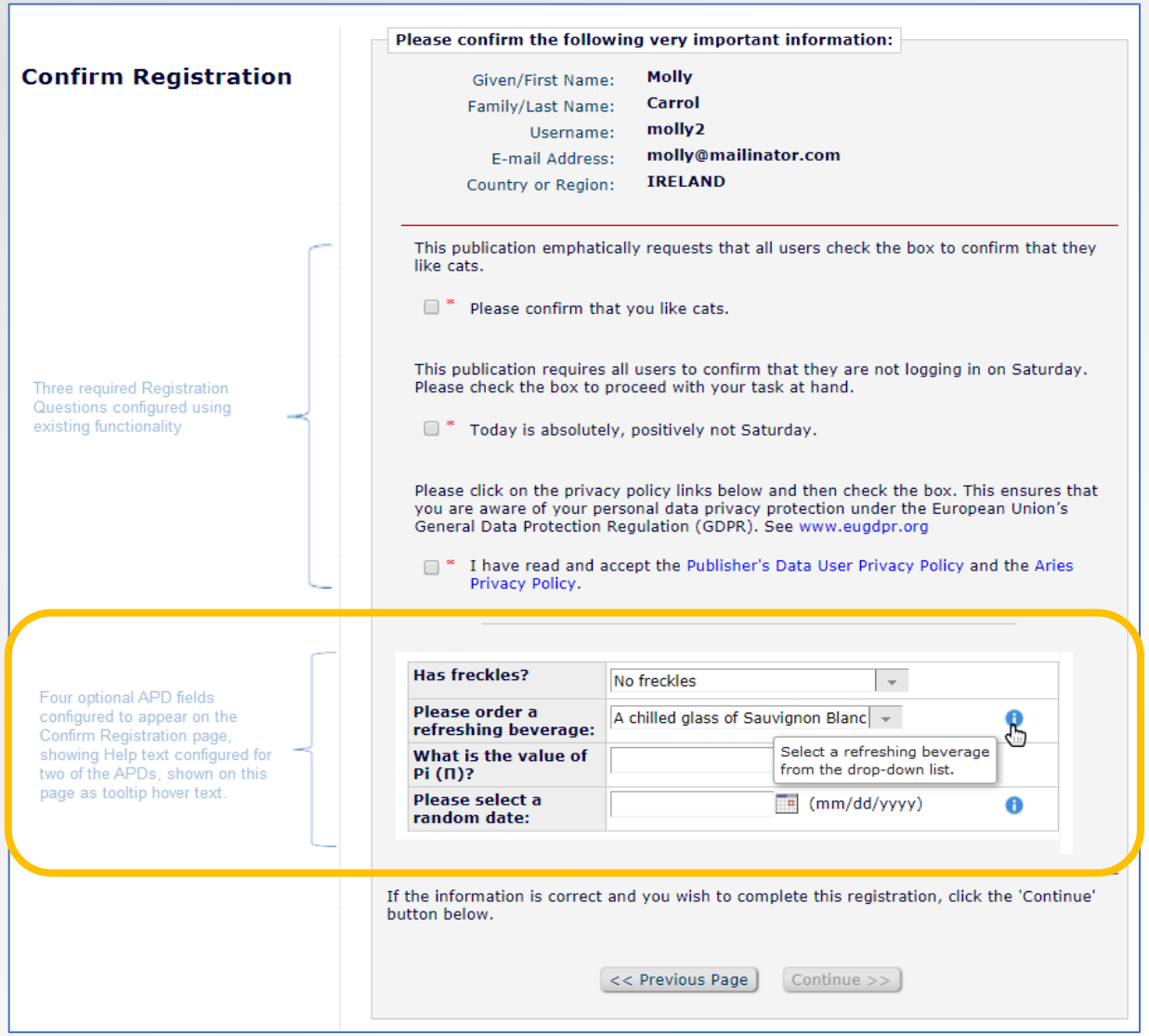
- Only available to Editors via Search People – Update Information page
- Limited use because users cannot supply this information themselves





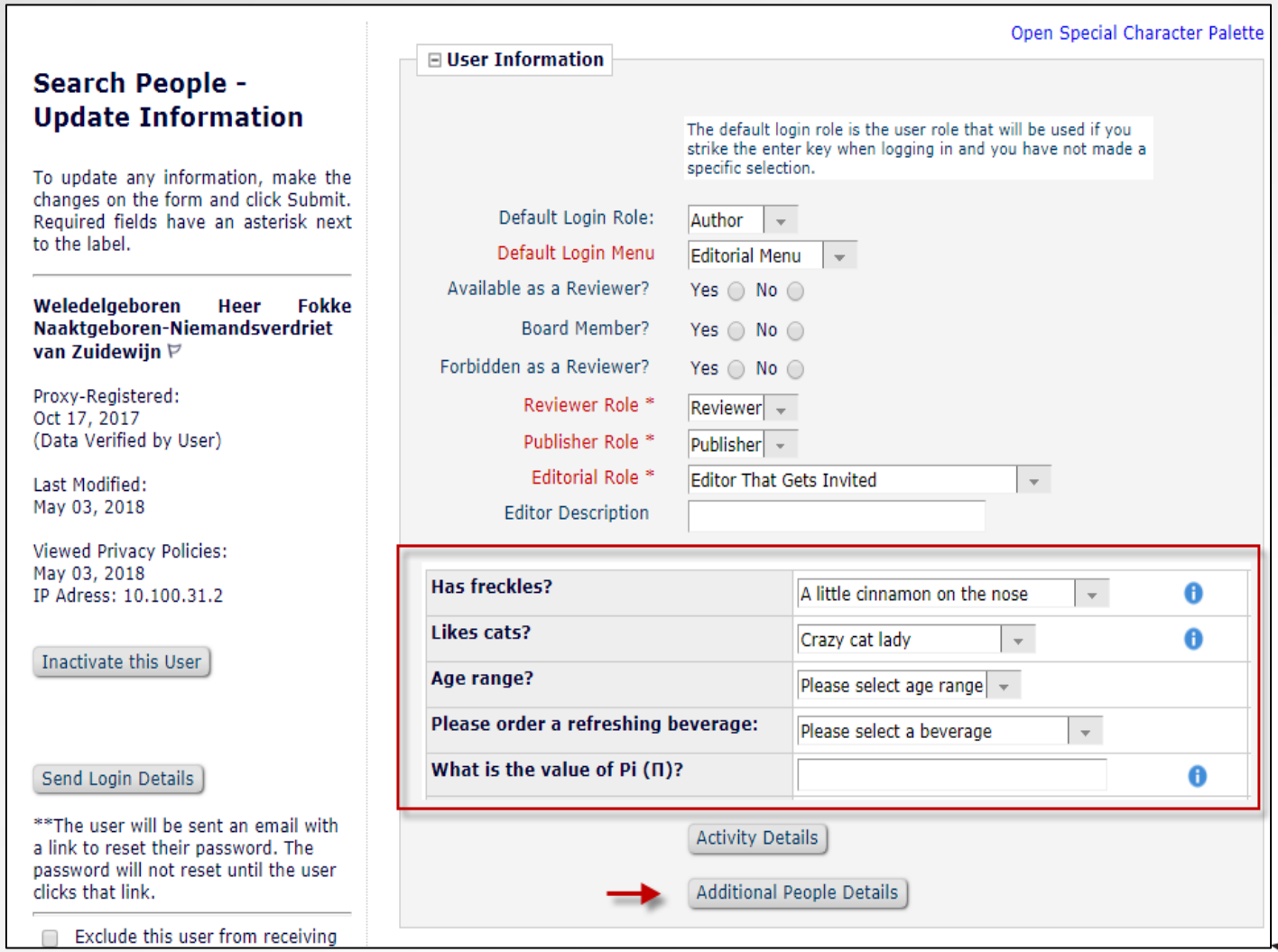
NEW: Use APDs as Registration Questions!

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



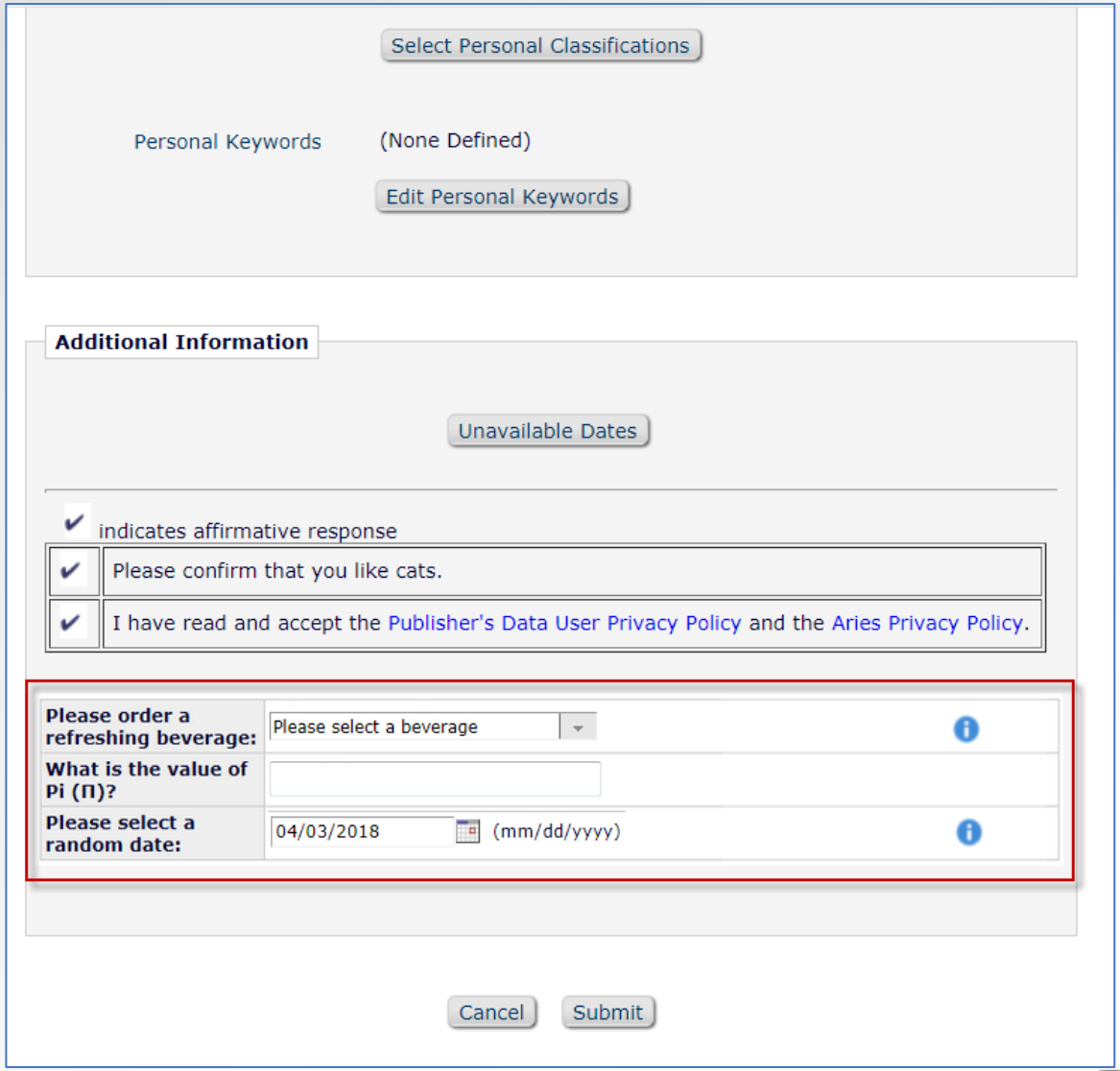
Displayed on Search People – Update Information

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

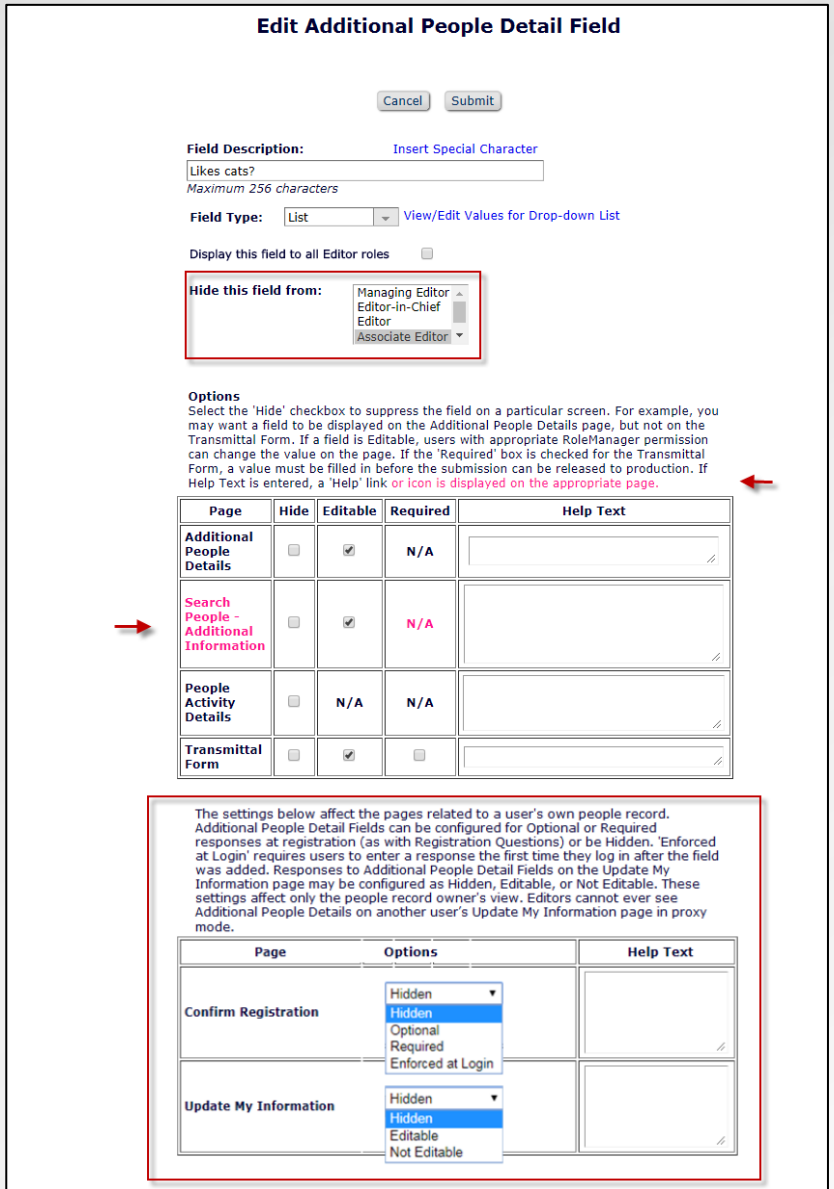


Also Displayed on Update My Information Page

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



Extended Configuration Options for APDs



1. APDs can be configured to be hidden from certain roles. For example, APDs whose responses reveal age, race, or other sensitive personal information may be disclosed to editorial staff members, but concealed from editors or associate editors.

2. Display directly on SP-UI page so you don't have to click through to People Activity Details

3. APDs can be set to Hidden, Optional or Forced on the *Registration* page.