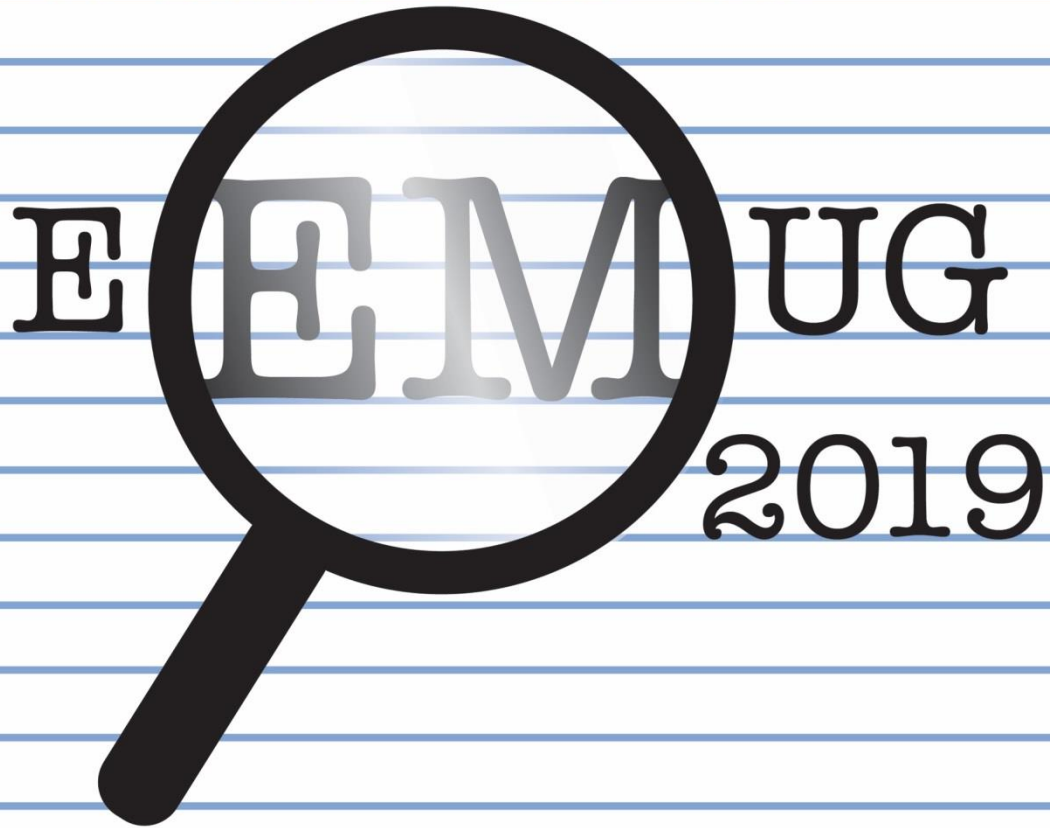


Welcome to



#EEMUG2019



ORCID*: Reviewer Recognition

Sean MacRae, Senior Business Systems Analyst

*and more...



Increased Need for Reviewer Recognition



Problem

- People want recognition for the work they do, including the peer review performed for research journals, grant applications, etc. This includes reviews for rejected papers.
- Publishers are looking for ways to reward their Reviewers.
- The industry is looking for ways to get more people registering and authenticating ORCID iDs.

EM Solution

- Provide an automated mechanism for recording peer review activity in scholars' ORCID records from EM.
- Support additional methods of automatically sending review information to other third party Reviewer recognition services (e.g. Publons)



ORCID Review Deposit

(Version 15.0)



Update ORCID with Peer Review Details

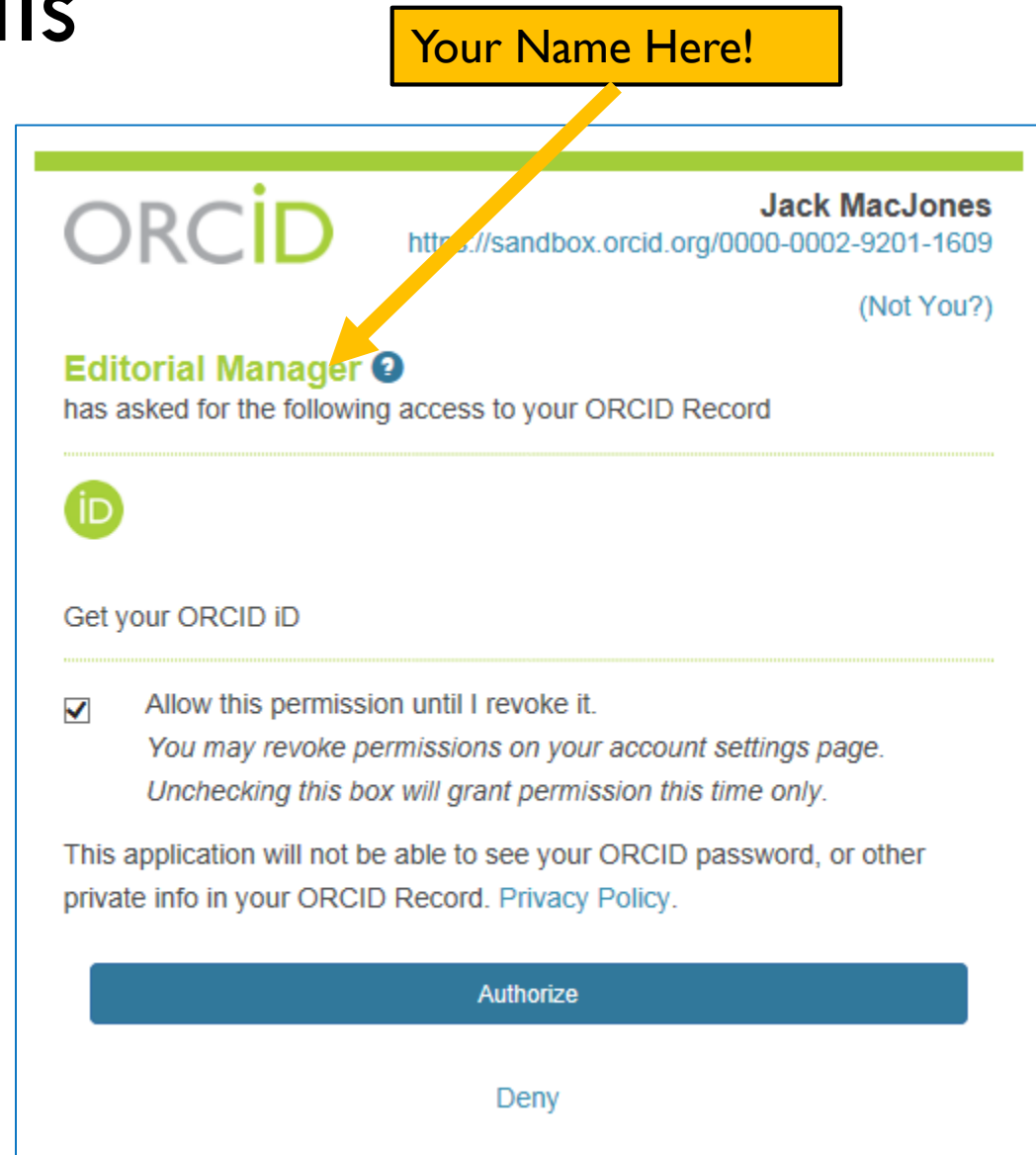
Multiple system enhancements were implemented:

- Full ORCID API v2.0 compatibility - Behind the scenes
- Custom Client Credentials - Affects who the user is told is requesting access to their ORCID record (i.e. Journal name instead of Editorial Manager)
- Review Deposit functionality – Automatically give Reviewers credit



Custom Client Credentials

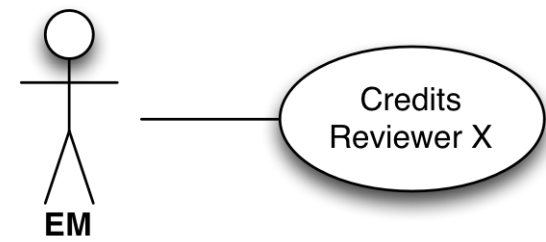
- Publishers register their own Client Application with ORCID to obtain credentials
- These are sent to Aries Client Services outside of EM
- Contact Aries Client Services; Aries administrators complete the setup
 - Gotcha: when registering *your* client, you must register *EM* as a valid callback URL



The screenshot shows an ORCID authorization interface. At the top, the ORCID logo is on the left, and the user's name 'Jack MacJones' and profile URL 'https://sandbox.orcid.org/0000-0002-9201-1609' are on the right. Below this, the text '(Not You?)' is visible. The main heading is 'Editorial Manager' with a question mark icon. Below the heading, it says 'has asked for the following access to your ORCID Record'. A section titled 'Get your ORCID iD' contains a checked checkbox and the text: 'Allow this permission until I revoke it. You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.' At the bottom, there are two buttons: 'Authorize' (a large blue button) and 'Deny' (a smaller blue button). A yellow callout box with the text 'Your Name Here!' has an arrow pointing to the 'Editorial Manager' heading.



Enabling ORCID Review Deposit



- 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
 - EM can also register a Review Group if necessary
- ‘Convening Organization’ Details are metadata sent each time
- Contact Aries Client Services to enable and configure



Enabling ORCID Review Deposit

Review Group = Journal

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 psychol

| Review date | Type | Role | Actions |
|-------------|--------|----------|---|
| 2005 | review | reviewer | hide details view |

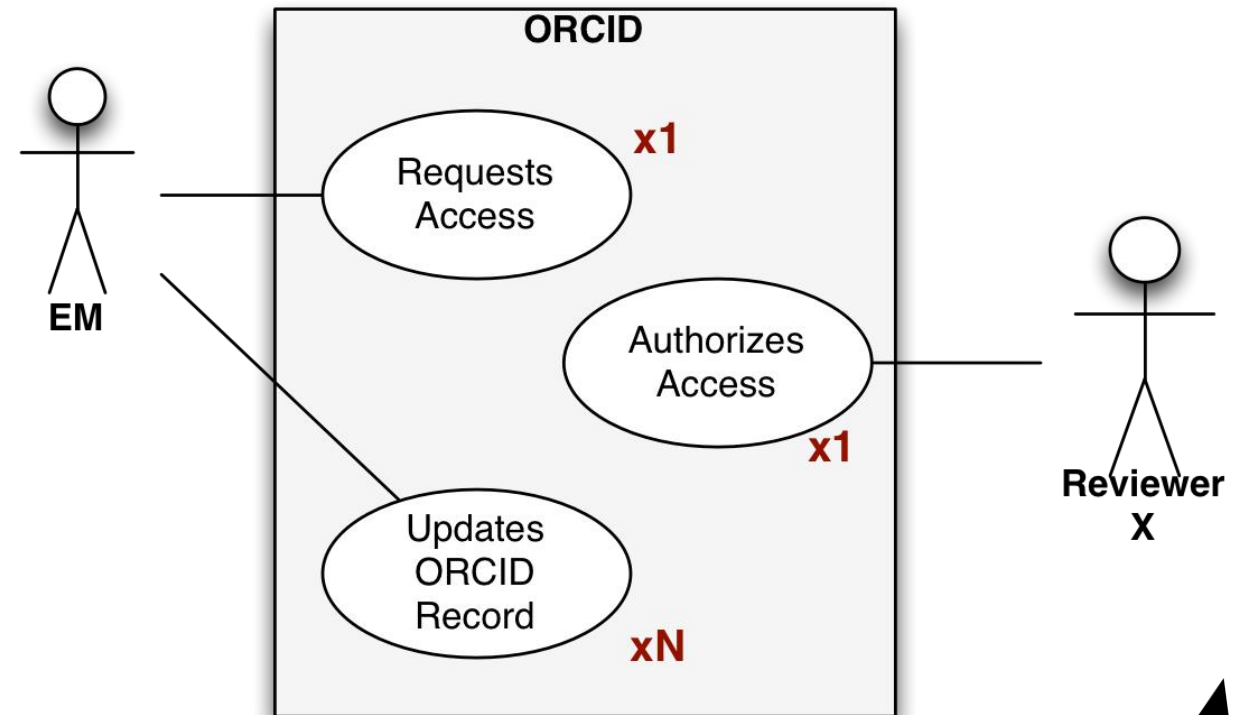
Review identifier(s): SOURCE-WORK-ID: NPG-Neuro-230497826
Convening organization: Nature Publishing Group (London, United Kingdom)

Convening Organization = Publisher



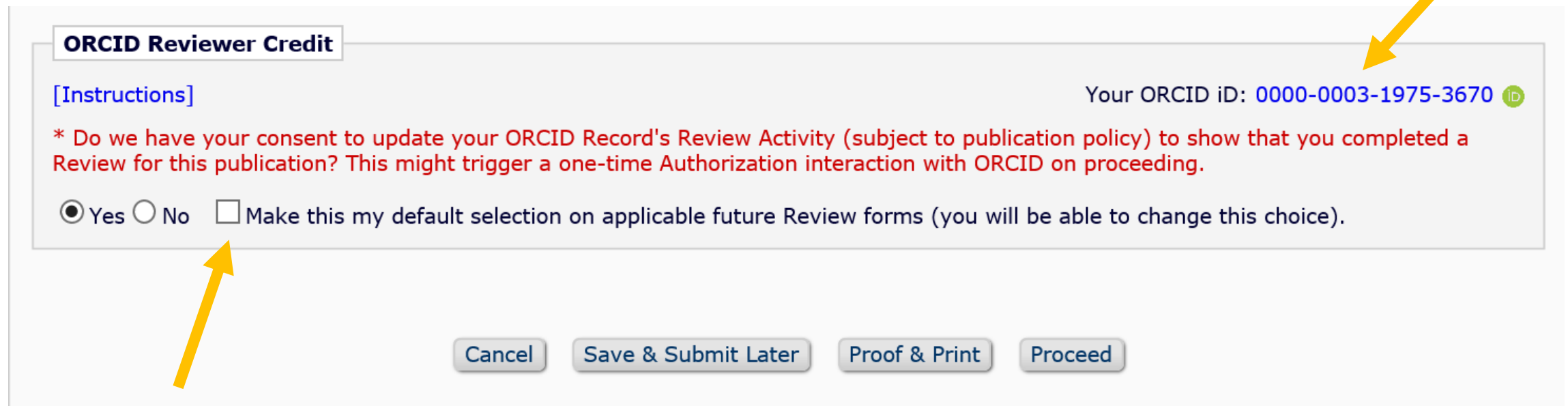
Review Credit Process

- 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).

Reviewer Experience: Reviewer needs an ORCID iD if authorizing deposit

- In this example, the Reviewer does not yet have an ORCID iD

ORCID Reviewer Credit

[\[Instructions\]](#)

* 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.

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.

Close

[What is ORCID?](#)



What is ORCID?

An ORCID iD is a nonproprietary alphanumeric code that uniquely identifies an academic author. It is a 16-digit code, in the format: 0000-0000-0000-000X. Publishers use it to unambiguously attribute any published work to the correct authors.

ORCID is a not-for-profit association of publishers and academic organizations that maintains the central registry of these personal identifiers (ORCID iDs) and associated public profiles for authors in

Close

Reviewer Experience: Reviewer needs an ORCID iD if authorizing deposit

- Reviewer chooses 'Yes' and clicks 'Proceed'

ORCID Reviewer Credit

[\[Instructions\]](#) [What is ORCID?](#)

* 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.

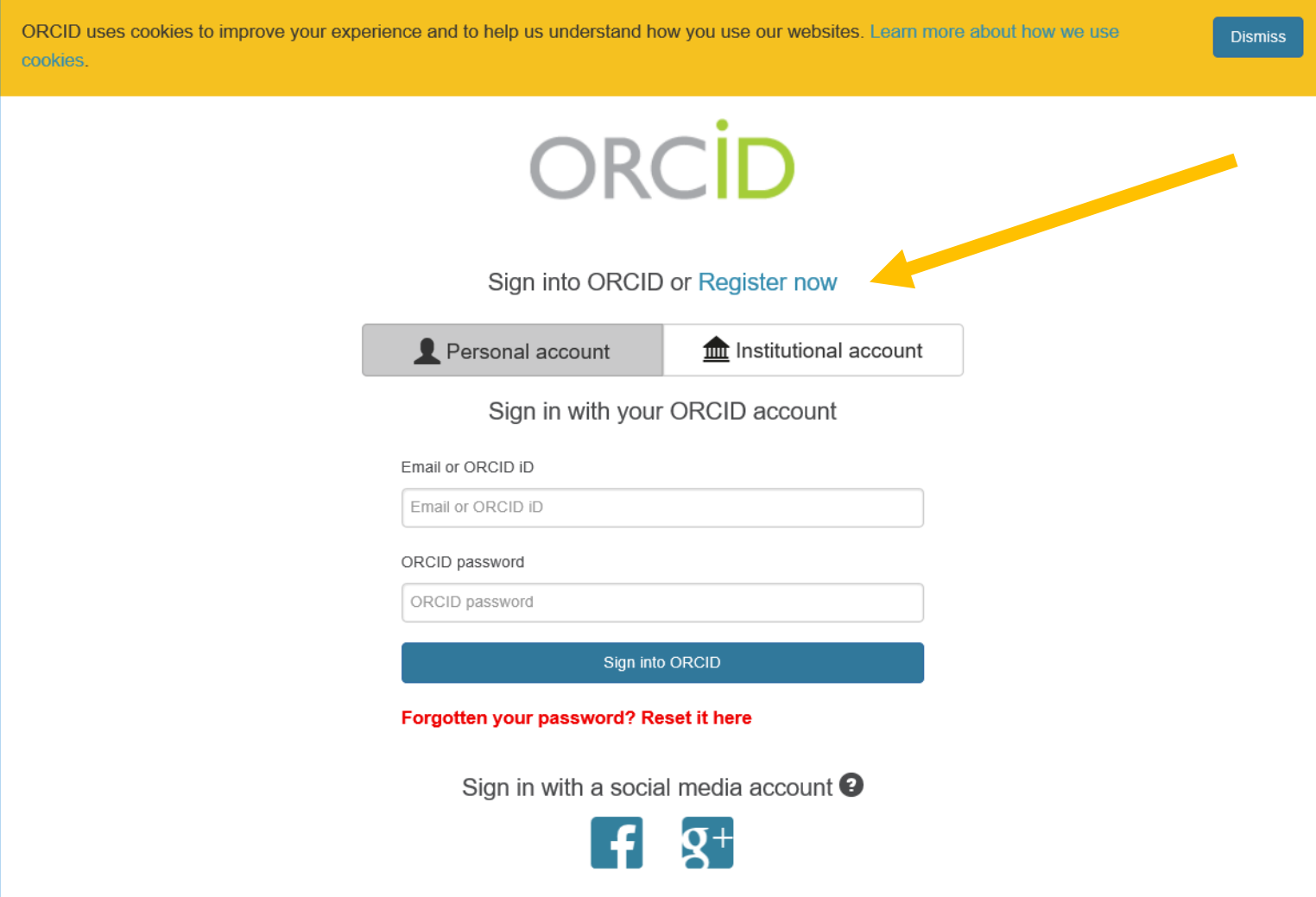
Yes No Make this my default selection on applicable future Review forms (you will be able to change this choice).

[Cancel](#) [Save & Submit Later](#) [Upload Reviewer Attachments](#) [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: Just a few simple steps to register



Already have an ORCID id? [Sign In](#)

Per ORCID's [terms and conditions](#) , you may only register for an ORCID id for yourself.

First name * ?

Last name

Primary email *

Additional email ?

[+ Add another email](#)




Create an ORCID password * ?

Confirm ORCID password *

Visibility settings

Your ORCID id connects with your ORCID record that can contain links to your research activities, affiliations, awards, other versions of your name, and more. You control this content and who can see it.

By default, who should be able to see information added to your ORCID Record?

-  **Everyone** (87% of users choose this) * ?
-  **Trusted parties** (5% of users choose this)
-  **Only me** (8% of users choose this)

Notification settings

ORCID sends email notifications about items related to your account, security, and privacy, including requests from ORCID member organizations for permission to update your record, and changes made to your record by those organizations.

You can also choose to receive emails from us about new features and tips for making the most of your ORCID record.


Please send me quarterly emails about new ORCID features and tips

After you've registered, you can change your notification settings at any time in the account settings section of your ORCID record.

Terms of Use

I consent to the [privacy policy](#) and [terms and conditions](#) of use, including agreeing to my data being processed in the US and being publicly accessible where marked Public.

You must accept the terms and conditions.

I'm not a robot 
reCAPTCHA
Privacy - Terms

Reviewer Experience: Just a few simple steps to register

- Click 'Authorize' and user receives an email from ORCID to verify email address

The image shows two overlapping screenshots illustrating the ORCID registration process. The left screenshot is an authorization dialog box. At the top, it says "ORCID" and "Stacey Lavelle" with a URL: "https://sandbox.orcid.org/0000-0002-8038-6657". Below this, it states "Editorial Manager" has asked for access to the user's ORCID Record. A list of permissions includes "Read your limited-access information" and "Add or update your research activities". A note 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.

The right screenshot is an email titled "Welcome to ORCID - verify your email address" sent on "Fri Jun 08 2018 13:08:36 GMT-0400 (Eastern Daylight Time)". The email content says: "Stacey Lavelle, Thank you for creating your ORCID identifier. Please verify your email address to complete your registration and gain access to manually edit your record: click the following link and sign into your ORCID record. If you can't click the link, copy and paste it into your browser's address bar." Below the text is a blue button labeled "Verify your email address". A yellow arrow points to this button. At the bottom of the email, a long URL is provided: "https://sandbox.orcid.org/verify-mail/UEw1M2hZbzhMWmpsWXdlMEpONHhkY29mRU01L0x0ei82NGJYSXhDbWxYUno1dEtEbFRtVDMxaXJtSm9nUDhTQQ".

A yellow box with the text "Your Name Here!" is positioned between the two screenshots, with a yellow arrow pointing from it to the "Editorial Manager" text in the left screenshot.



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](#)



Reviewer Experience: Change your mind?



- Submission is now in her Completed Reviewer Assignments folder
- ORCID Deposit Authorization link is displayed for eligible reviews, not yet deposited
- Allows Reviewer to change mind, or supply permission

Completed Reviewer Assignments for Stacey J Lavelle, MD

Page: 1 of 1 (4 total assignments)

Display 10 results per page.

| Action | My Reviewer Number | Manuscript Number | Article Type | Article Title | Final Disposition | Date Reviewer Invited | Date Reviewer Agreed | Date Review Due | Date Review Submitted | Days Taken | Editor's Name | Corr. Author |
|---|--------------------|-------------------------|--------------|-------------------------------|-------------------|-----------------------|----------------------|---------------------|-----------------------|------------|-------------------|---------------------|
| History View Reviewer Comments Similar Articles in MEDLINE ORCID Deposit Authorization | 1 | STACEYDEV150-D-18-00006 | Clinical | EMUG 2018 is the place to be! | | Jun 8 2018 12:32PM | Jun 8 2018 12:32PM | Jun 28 2018 11:59PM | Jun 8 2018 1:21PM | 0 | Ed P Garcia, M.D. | Jenna M Lavelle, MD |
| History View Reviewer Comments Similar Articles in MEDLINE | 1 | STACEYDEV92-D-12-00008 | Clinical | Title | | Aug 7 2012 11:40PM | Aug 7 2012 11:41PM | Aug 27 2012 11:59PM | Aug 16 2012 7:41AM | 9 | Ed Editor | Ed P Garcia, M.D. |


Reviewer Experience: Change permission

ORCID Deposit Authorization

Details of this eligible review have not yet been sent to ORCID. You may change your mind to grant or deny permission to transfer this review, up to the point that this Review is sent to ORCID after you respond 'Yes'.

ORCID Reviewer Credit

[\[Instructions\]](#)



Your ORCID ID: 0000-0002-8038-6657 

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

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](#)

Search   English

[EDIT YOUR RECORD](#)

[ABOUT ORCID](#)

[CONTACT US](#)

[HELP](#)


ORCID

Connecting Research
and Researchers

53,963 ORCID IDs and counting. [See more...](#)

Stacey Lavelle

ORCID ID

 <https://sandbox.orcid.org/0000-0002-8038-6657>

 [Print view](#)

No public information available.



Authorization cannot be granted in proxy mode

- If an Editor is proxying on behalf of the Reviewer, he 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.

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



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](#)

Reviewer Activity.

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 Article Type | Reviewer | Biostat Reviewer | Special Reviewer |
|-------------------------------|---|--|---|
| 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"/> |



EM Integration with other Reviewer Recognition Services

 publons



Opt-in Question on Review Form

- Reviewer grants explicit permission for journal to send data to Publons

Reviewer Recommendation and Comments for Manuscript Number STACEYDEV150-D-18-00005

EMUG 2018 is the place to be!

Original Submission
Jenna M Lavelle (Reviewer 1)

Recommendation: B Overall Manuscript Rating (1-100): 85

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

[Reviewer Instructions](#)

Review Questions

*Are you seeking CME credit? [\[Instructions\]](#) [Insert Special Character](#)

Yes

*Do you give this journal permission to share Reviewer data, including your identity, with Publons?

Yes
No



Configuration: PolicyManager

- Create/Edit Custom Review Questions
 - *Create custom question for 'opt in' permission to send completed review to Publons*
- Create/Edit Review Form
 - *Add new question to desired Review Forms*
- Match Review Forms to Article Types and Reviewer Roles

PolicyManager Main Menu

[Expand All](#) [Collapse All](#)

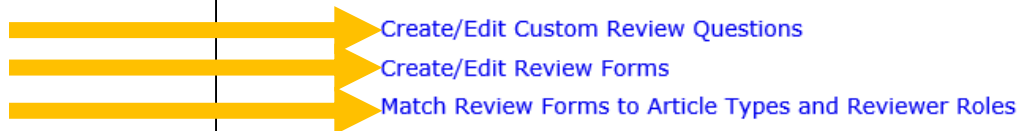
- Registration and Login Policies**
- Status Policies**
- Submission Policies**
- Questionnaire Policies**
- Additional Data Policies**
- Editor Assignment Policies**
- Suggest Editor Policies**
- Reviewer and Editor Form Policies**

Manuscript Rating Question Configuration

- [Edit Manuscript Rating Questions](#)
- [Overall Manuscript Rating Question Settings](#)
- [Edit Manuscript Rating Instructions](#)

Reviewer Recommendation Policies

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- [Create/Edit Custom Review Questions](#)
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- [Set Pending Assignments Deep Link Expiration](#)
- [Configure ORCID Review Deposit](#)
- [Set Reviewer Recommendation Deep Link Expiration](#)



Configuration: Create/Edit Custom Review Question

- Create custom question for 'opt in' permission to send completed review to Publons
- Response Type: Yes/No

Edit Custom Review Question

Enter the question, default response text (if required), and any instructions to be displayed as part of the Review Form used at the Submit Recommendation step of the review process. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Review Question is no longer available for inclusion in new Review Forms.

Reviewer responses must be configured to use a specific Response Type: **Text** and **Notes** responses can contain any mix of characters and numbers. A **Date** response must be entered in a mm/dd/yyyy format. **Integer** and **Decimal** responses can contain only a number or decimal point. A **List** response requires the Reviewer to select from the list of responses. If **List** is chosen for the response type, additional options will appear which allow configuration of the list choices and type (dropdown, radio, checkboxes or scrolling selector). The **Yes/No** and **Yes/No/NA** response types will create a dropdown list with the options of Yes, No and Yes, No, Not Applicable, respectively. The **Yes/No/Text** response type will display a text box to gather additional information if the user chooses an option which requires further clarification.

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

Question: [Insert Special Character](#)

Do you give this journal permission to share Reviewer data, including your identity, with Publons?

Instructions for Reviewer Response: [Insert Special Character](#)

Hide: When you **Hide** a Custom Review Question, the question is deactivated (not available for use with new Review Forms).

Available for Decision Letter Merging: When you select this checkbox, both the question and answer can be merged into the decision letter using the %REVIEW_QUESTIONS_AND_RESPONSES% or %RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR% merge fields. Editors will be able to de-select individual responses from any Reviewer before the Author is notified. The question and answer will also be inserted into Reviewer Invitation/Assignment Letters by the %REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR% merge field, for those reviews explicitly selected by the Editor for inclusion

Response Type: Yes/No



Configuration: Create/Edit Review Form

- Add new question to Review Form(s)

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 less than day(s) late

Custom Review Questions

Select Questions

| Order | Question | Required for Submission | Visible to Other Reviewers | Visible to Author | Actions |
|--------------------------------|--|-------------------------------------|-------------------------------------|--------------------------|------------------------|
| <input type="text" value="1"/> | Do you give this journal permission to share Reviewer data, including your identity, with Publons? | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Remove |
| <input type="text" value="2"/> | Are you seeking CME credit? | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Remove |
| <input type="text" value="3"/> | Please describe any flaws in the experiment design. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Remove |



Configuration: Match Reviewer Roles to Article Types

- Make sure the correct Review Form(s) 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 Article Type | Reviewer | Biostat Reviewer | Special Reviewer |
|-------------------------------|---|--|---|
| 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"/> |



Set up Publons Report

Reports

Report Tools

- Enterprise Analytics Reporting
- General Data Export
- Custom Report
- Search/Manage Conference Submissions

Status Reports

- Accepted Manuscripts Without a Publication Date
- Current Status Report
- Publishing Pipeline Report
- Published Table of Contents Report
- Editor's To-Do List Report
- Current Role Designations Report

Author Reminder Reports

- Co-Author Reminder Report

Production Tracking Reports

- Avg Days to Complete Production Tasks in selected timeframe
- Submission Turnaround Times - Editorial and Production
- Submission Turnaround Times - Production

Third Party Exports

- CRedit Usage by Manuscript
- CRedit Usage Report
- Impact Vizor - Published Article Export
- Impact Vizor - Rejected Article Export
- Kudos Report
- Publons Report



Publons Report: Sample Results

| Reviewer First Name | Reviewer Last Name | E-mail Address | Date Reviewer Invited | Reviewer Stop Date | Reviewer Recommendation | Reviewer Comments to Author |
|---------------------|--------------------|-------------------------|-----------------------|--------------------|-------------------------|--|
| Albert | Edwards | trash880@ariessc.com | 9/21/2005 | 5/2/2018 | Major Revision | |
| Dmitri | Khodjakov | dkhodjakov@ariessys.com | 5/1/2018 | 5/2/2018 | Major Revision | |
| Edward | Reviewer | trash488@ariessc.com | 5/2/2018 | 5/2/2018 | Minor Revision | Comments entered to the author by this reviewer. |
| Roger | Reviewer | trash4026@ariessc.com | 5/2/2018 | 5/2/2018 | Major Revision | Some comments. |
| Ron | Reviewer | trash3975@ariessc.com | 5/2/2018 | 5/2/2018 | Accept | Reviewer comments |

| Manuscript Number | Article Title | Handling Editor First Name | Handling Editor Last Name | Reviewer's Response | Revision Number | Abstract | Date Invitation Accepted |
|---------------------------|---|----------------------------|---------------------------|---------------------|-----------------|---------------|--------------------------|
| CAROLINETEST40-D-05-00028 | MS for bug 12121 | M. | Wilson | Yes | 0 | | 9/21/2005 |
| DMITRIDEV141-D-16-00047 | testing meta #5 from testweb | Dmitri | Khodjakov | Yes | 0 | | 5/1/2018 |
| DMITRIDEV150-D-18-00016 | Publons Report Test | Dmitri | Khodjakov | Yes | 0 | Abstract Text | 5/2/2018 |
| DMITRIDEV150-D-18-00016 | Publons Report Test | Dmitri | Khodjakov | Yes | 0 | Abstract Text | 5/2/2018 |
| CAROLINEDEV92-D-12-00015 | submission where violet is available at rev 0 | Ed | Editor | Yes | 1 | | 5/2/2018 |



Publons Report: Schedule Delivery

- Sent daily
- Attach Excel file
- Letter sent to Publons email address
- Consult your Account Coordinator for details

Report Delivery Schedule

You may schedule a date in the future to send your report. The report will be sent in the early morning hours of the first delivery date and subsequent dates as explained below. Current server date is Jun 15 2018 09:29AM.

Daily reports are delivered on all working days or on all calendar days, depending on your publication's general due date preferences selection.

Weekly reports are delivered on the first delivery date, and then on the same weekday of each subsequent week after the first delivery date at the same time (example: Wednesday November 10, then Wednesday November 17, then Wednesday November 24, Wednesday December 1, etc).

Monthly reports are delivered on the first delivery date, then on the same day of the month for each following month (example, on January 1, then on February 1, then on March 1).

Quarterly reports are delivered on the first delivery date, then on the same day of the first month of the next quarter following the first delivery date (example: first on January 15, then April 15, then July 15, then October 15 and then on January 15 of the following year.)

Close

New Delivery Schedule for this report

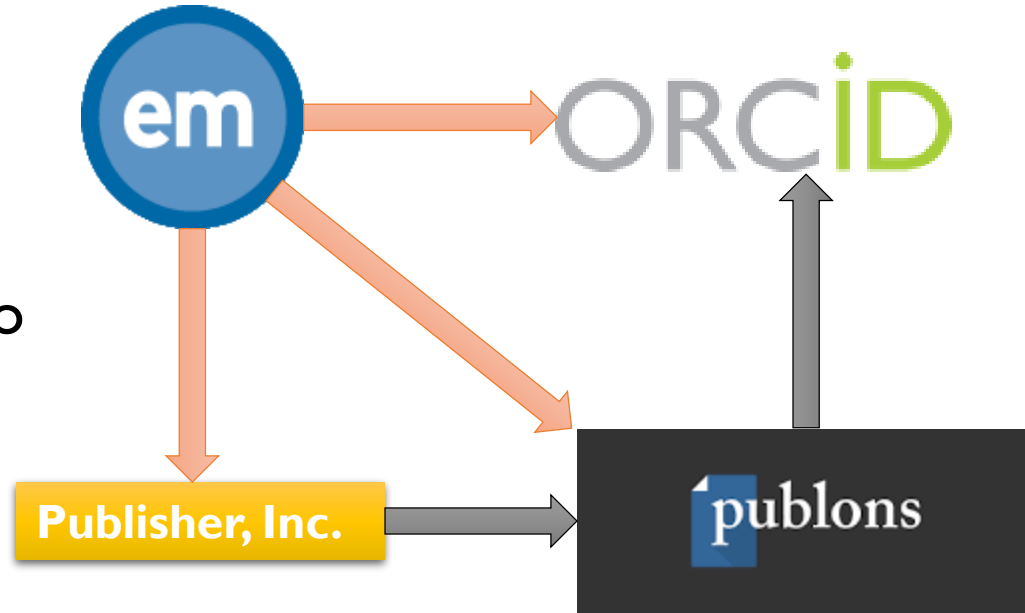
| | |
|-------------------------------|--|
| Schedule Description: | Insert Special Character Daily Publons Report <i>Maximum 200 characters</i> |
| Delivery Frequency: | Daily <input type="button" value="v"/> |
| First Delivery Date: | Date 06/16/2018 <input type="button" value="calendar"/> (mm/dd/yyyy) |
| Additional Deliveries: | End after: 5 <input type="button" value="v"/> total deliveries |
| Delivery Method: | <input checked="" type="radio"/> Email <input type="radio"/> SFTP |
| Letter: | Report to Publons <input type="button" value="v"/> <input type="checkbox"/> Attach PDF of report to e-mail <input checked="" type="checkbox"/> Attach Excel file of report to e-mail |

Save Delivery Schedule and Customize Letter



Publons is also an ORCID client

- So Publons can also update ORCID
 - Potential gotcha!
- Check before you enable in EM
 - If you're already sending from EM to Publons
 - If Publisher is sending to Publons
 - If Publisher is updating ORCID directly



Reviewer Recognition Recap

- Many players with vested interest in Reviewer recognition
 - Researchers/Reviewers – want credit for grant applications, performance evaluations and inclusion on their CV; including reviews on rejected papers
 - Editors/Publishers – can use these services to identify, retain and reward the best Reviewers
- Review deposit with ORCID automatically gives Reviewers credit, adhering to privacy rules and the journal's policies (e.g. blinding)
- EAR Report can be set up to automatically send reviews daily to Publons
- Additional EAR Reports (similar to Publons) can be created to work with other third party Reviewer recognition services



Coming up

- Access to ORCID Sandbox from Customer Test Sites
 - Arose from Beta/Gamma testing and early adopters
 - Tricky to assess using Live ORCID Site
 - A consequence of our Develop/QA/Production architecture



Guest Speaker

Alice Meadows

Director of Community Engagement & Support, ORCID

a.meadows@orcid.org



**THANK
YOU FOR
LISTENING
ANY
QUESTIONS?**

