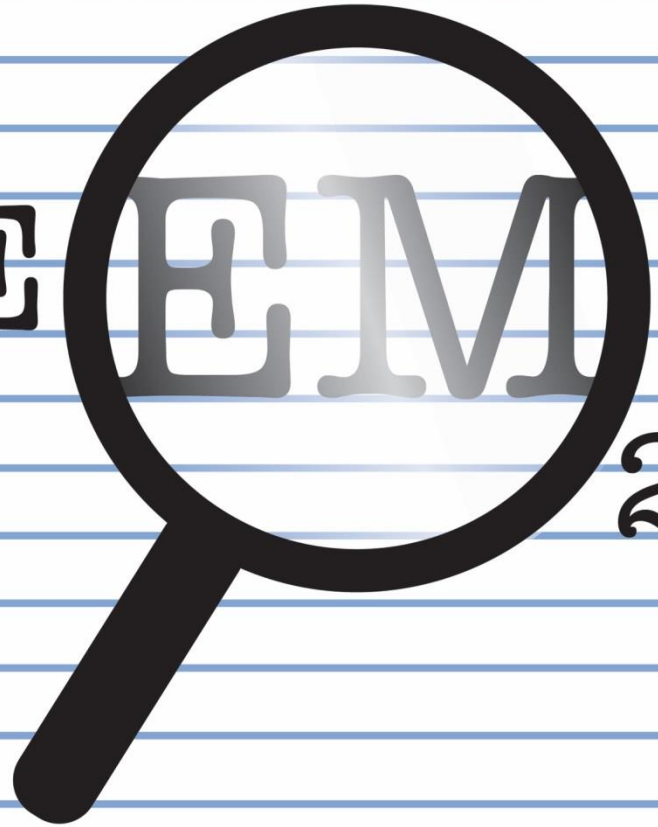
Welcome to



2019

#EEMUG2019

em Editorial Manager®

pm ProduXion Manager®

Aries systems

ORCID*: Reviewer Recognition

Sean MacRae, Senior Business Systems Analyst

*and more…

15th Annual European Editorial Manager User Group Meeting

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)

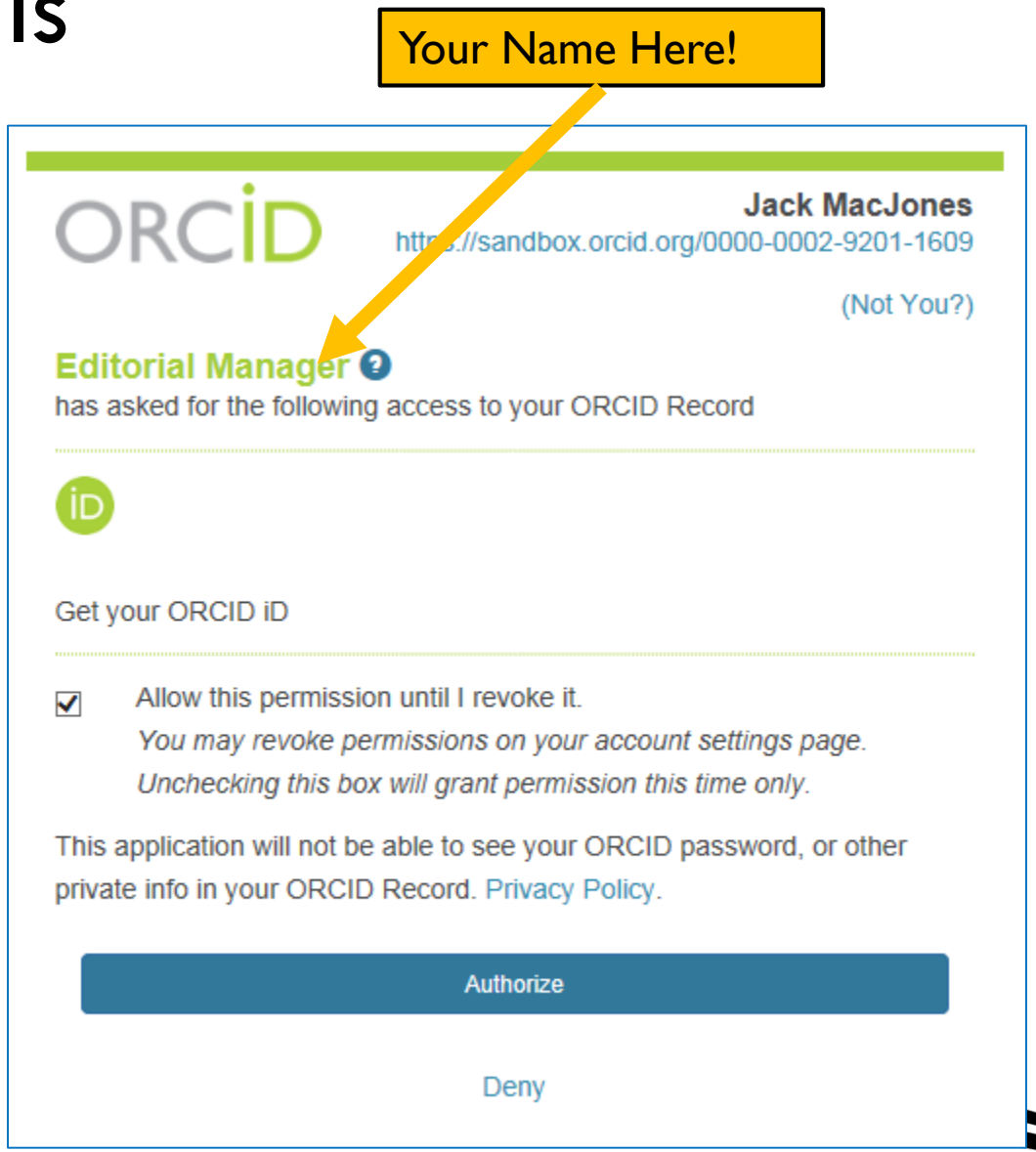
Update ORCID with Peer Review Details

Multiple system enhancements were implemented:

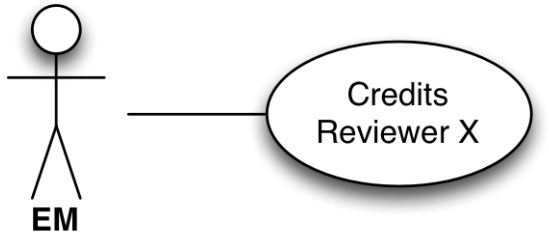
- Full ORCID API v2.0 compatibility - Behind the scenes
- Custom Client Credentials - Affects who the user is told is requesting access to their ORCID record (i.e. Journal name instead of Editorial Manager)
- Review Deposit functionality – Automatically give Reviewers credit

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



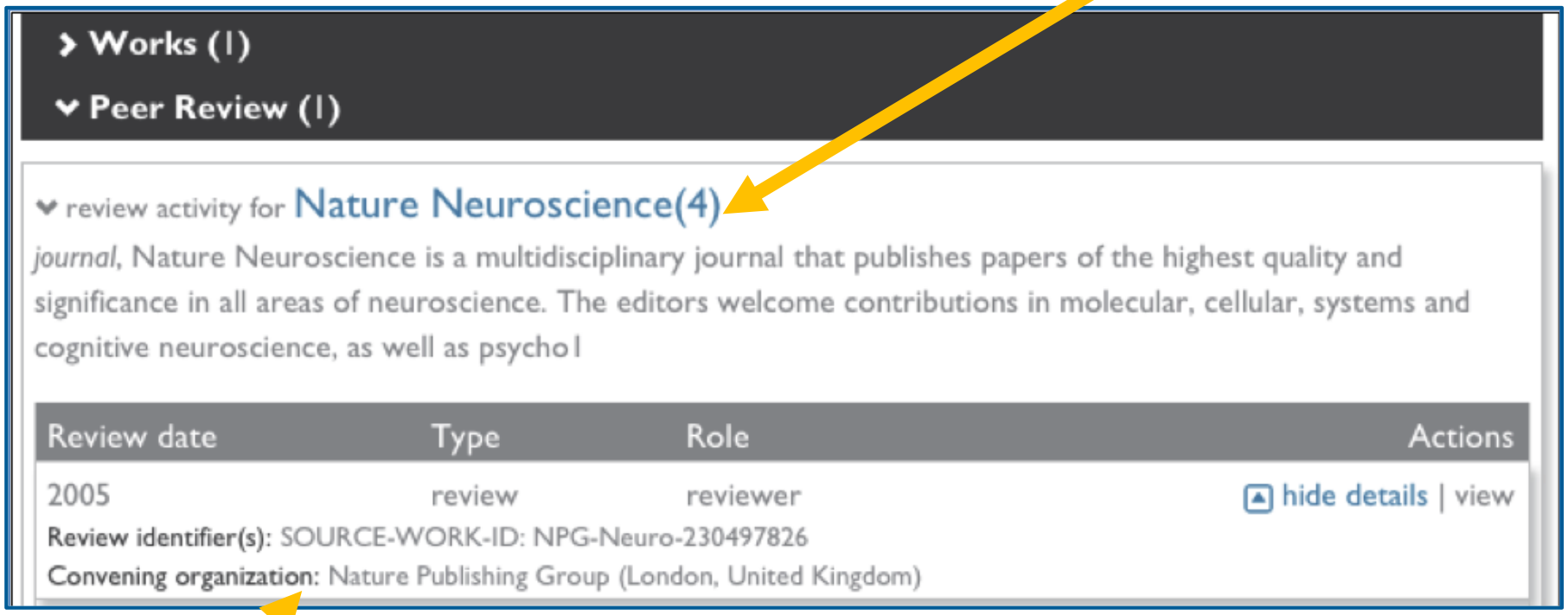
Enabling ORCID Review Deposit



- 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

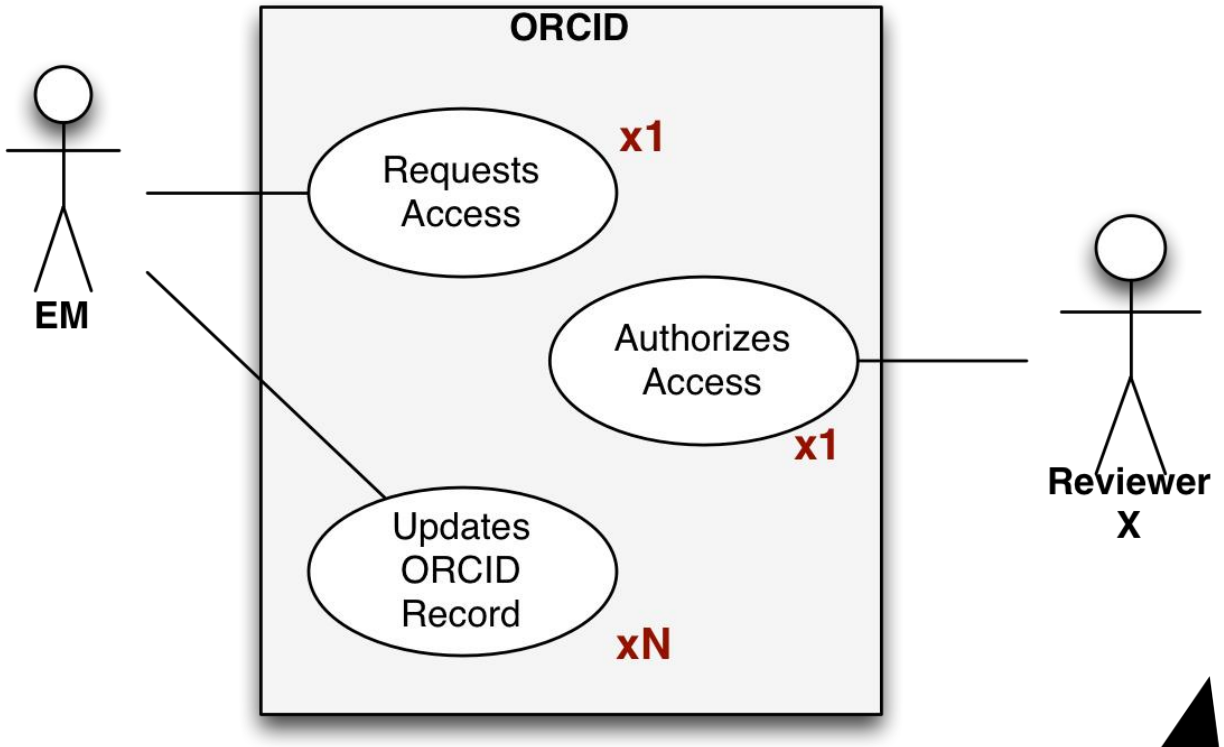
Review Group = Journal



Convening Organization = Publisher

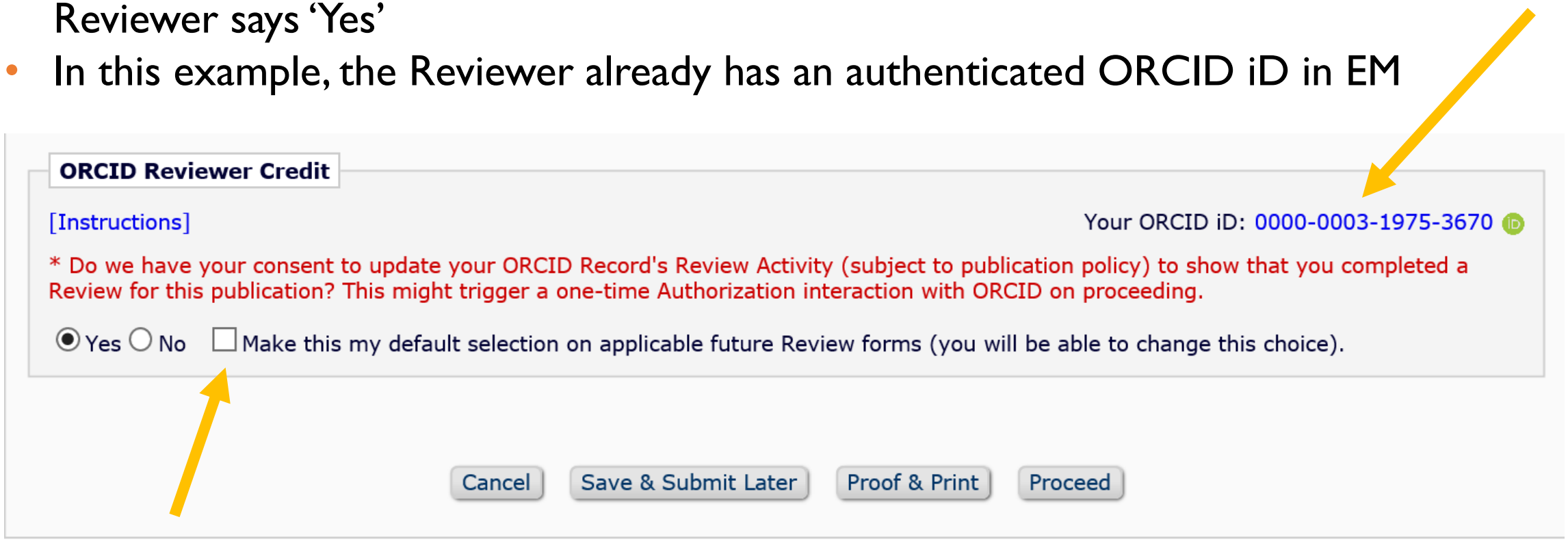
Review Credit Process

- 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



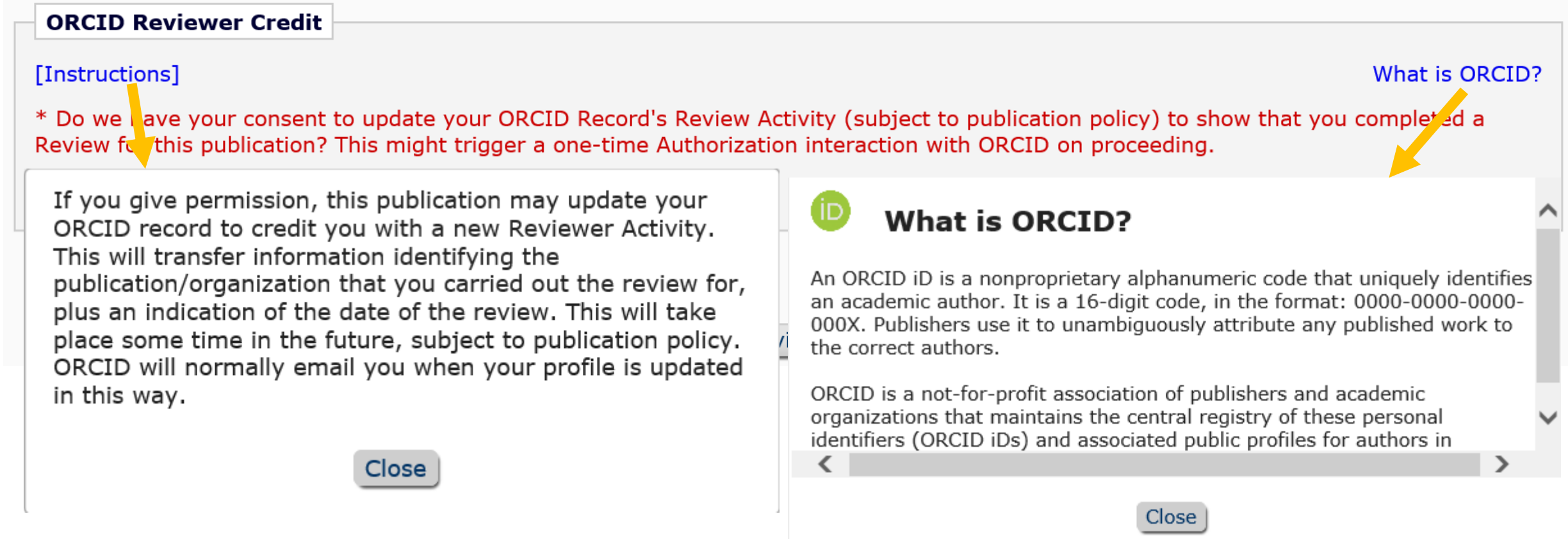
Reviewer Experience: Authorization question on Review Form

- 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



Reviewer Experience: Reviewer needs an ORCID iD if authorizing deposit

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

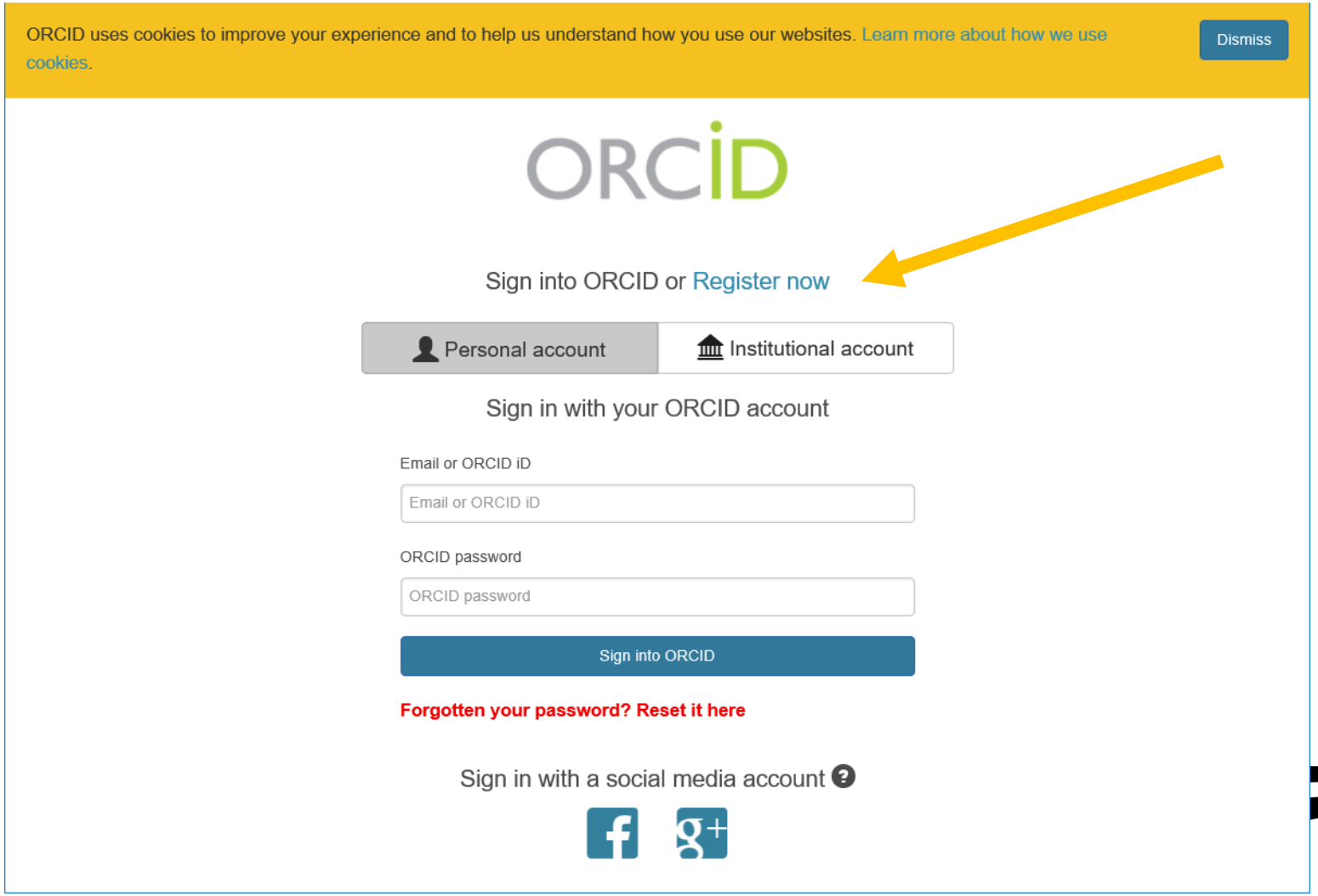


Reviewer Experience: Reviewer needs an ORCID iD if authorizing deposit

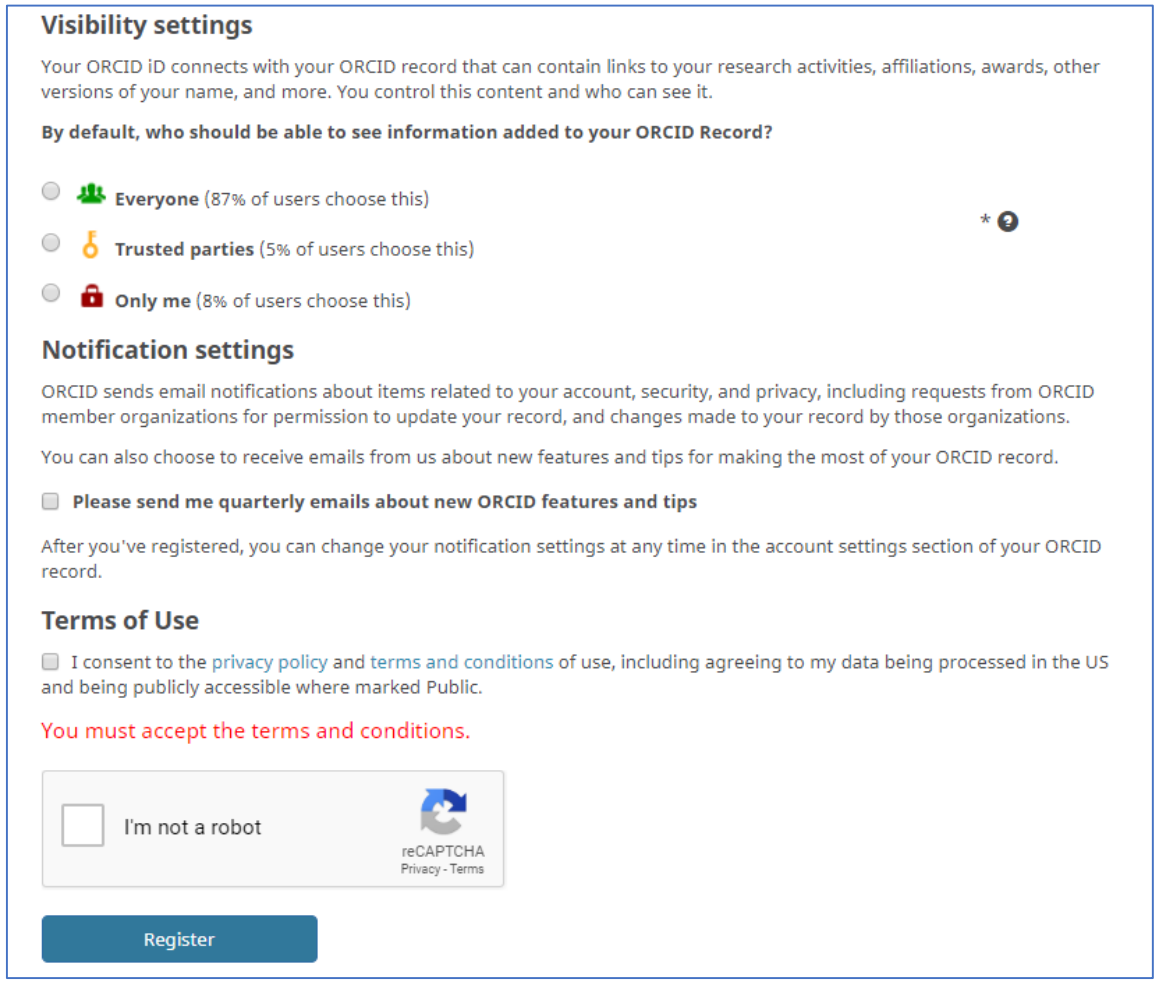
- Reviewer chooses 'Yes' and clicks 'Proceed'

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

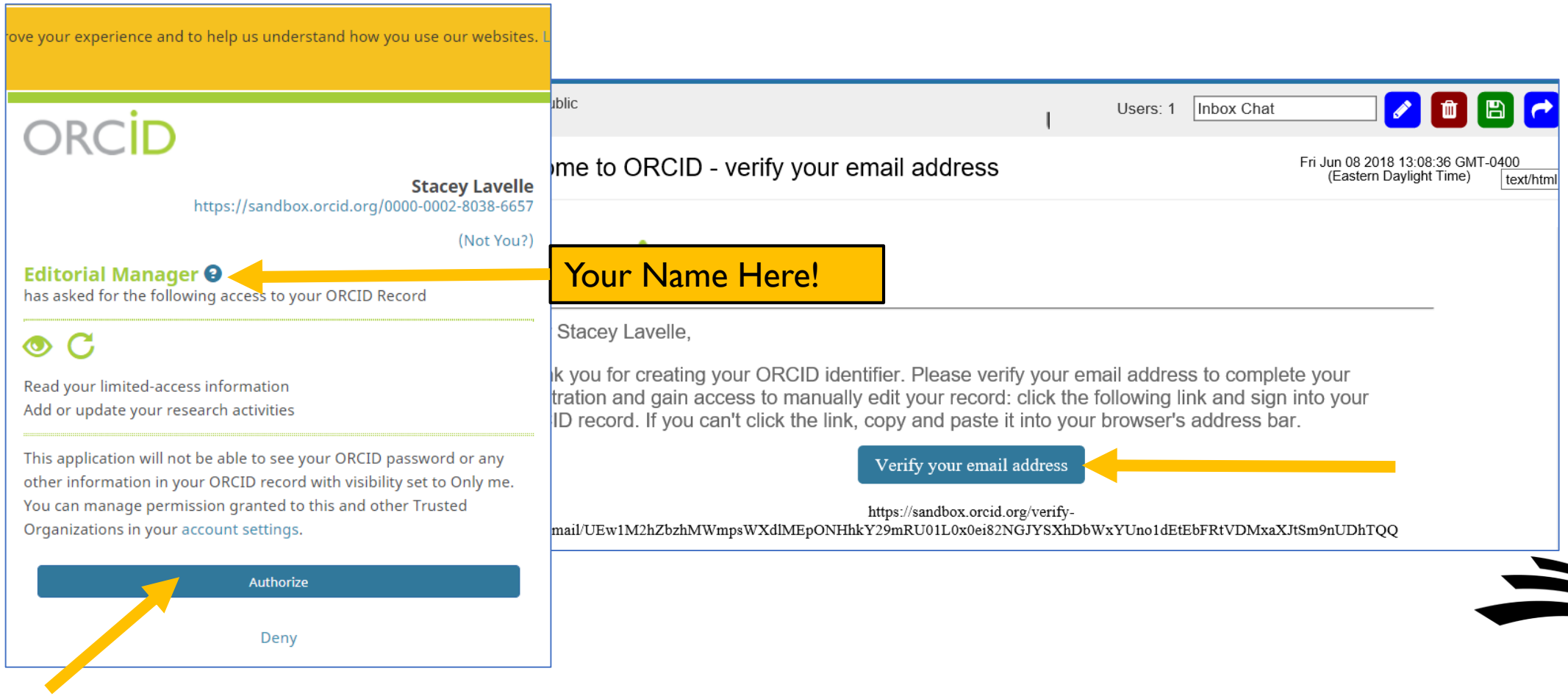


Reviewer Experience: Just a few simple steps to register



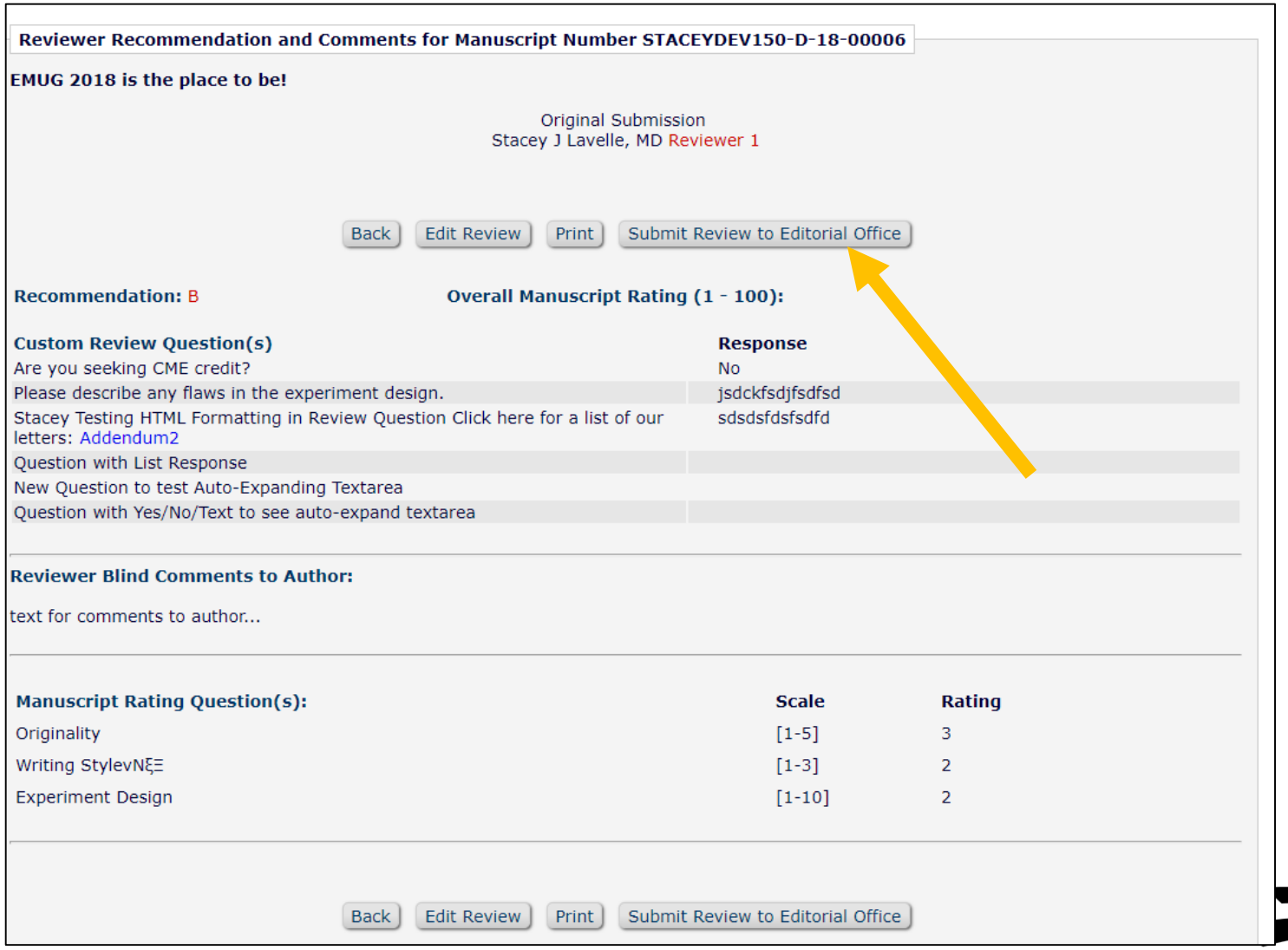
Reviewer Experience: Just a few simple steps to register

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



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.	jsdckfsdjfsdfsd
Stacey Testing HTML Formatting in Review Question Click here for a list of our letters: Addendum2	sdsdsfdsfsdfd
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 StylevNξΞ	[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

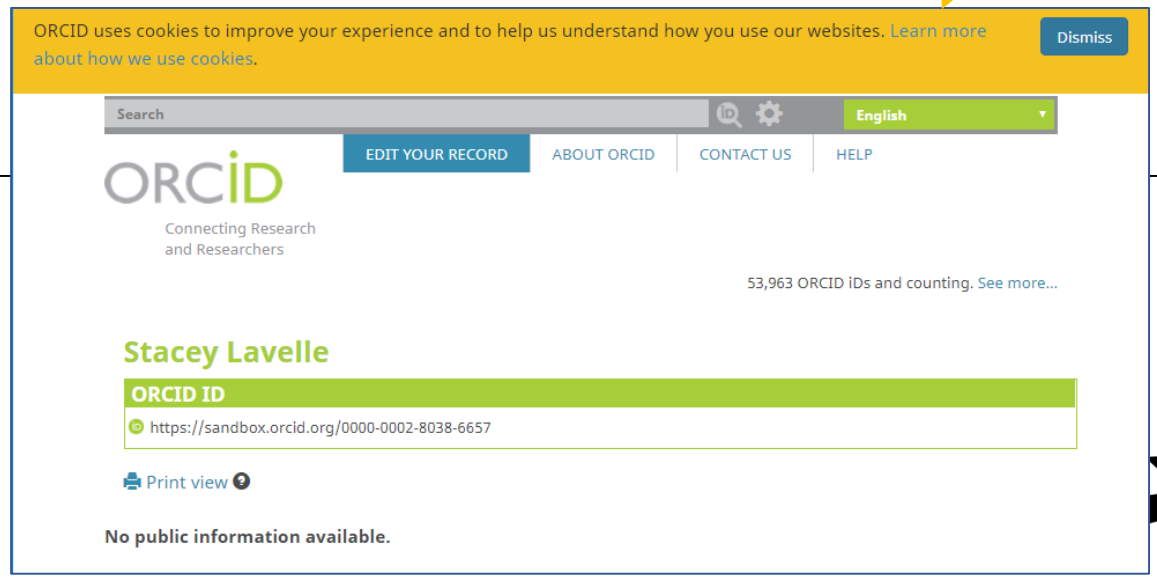
Details of this eligible review have not yet been sent to ORCID. You may change your mind to grant or deny permission to transfer this review, up to the point that this Review is sent to ORCID after you respond 'Yes'.

ORCID Reviewer Credit

[Instructions] Your ORCID iD: 0000-0002-8038-6657

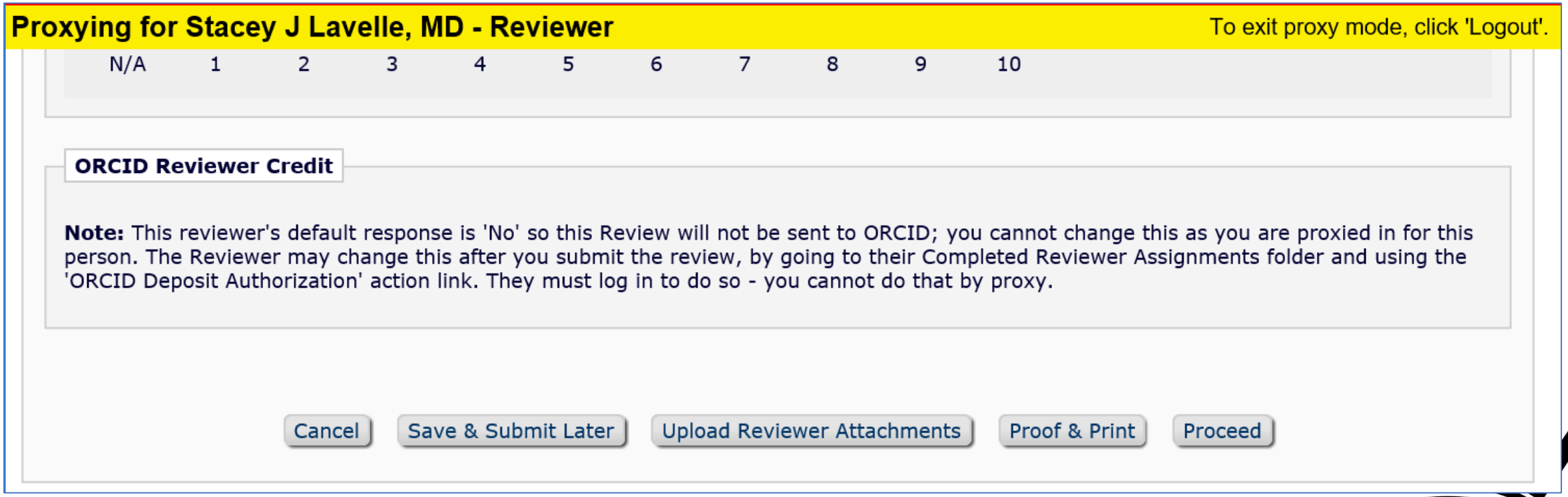
Do we have your consent to update your ORCID Record's Review Activity (subject to publication policy) to show that you completed a Review for this publication? This might trigger a one-time Authorization interaction with ORCID on proceeding.

(•) Yes ( ) No



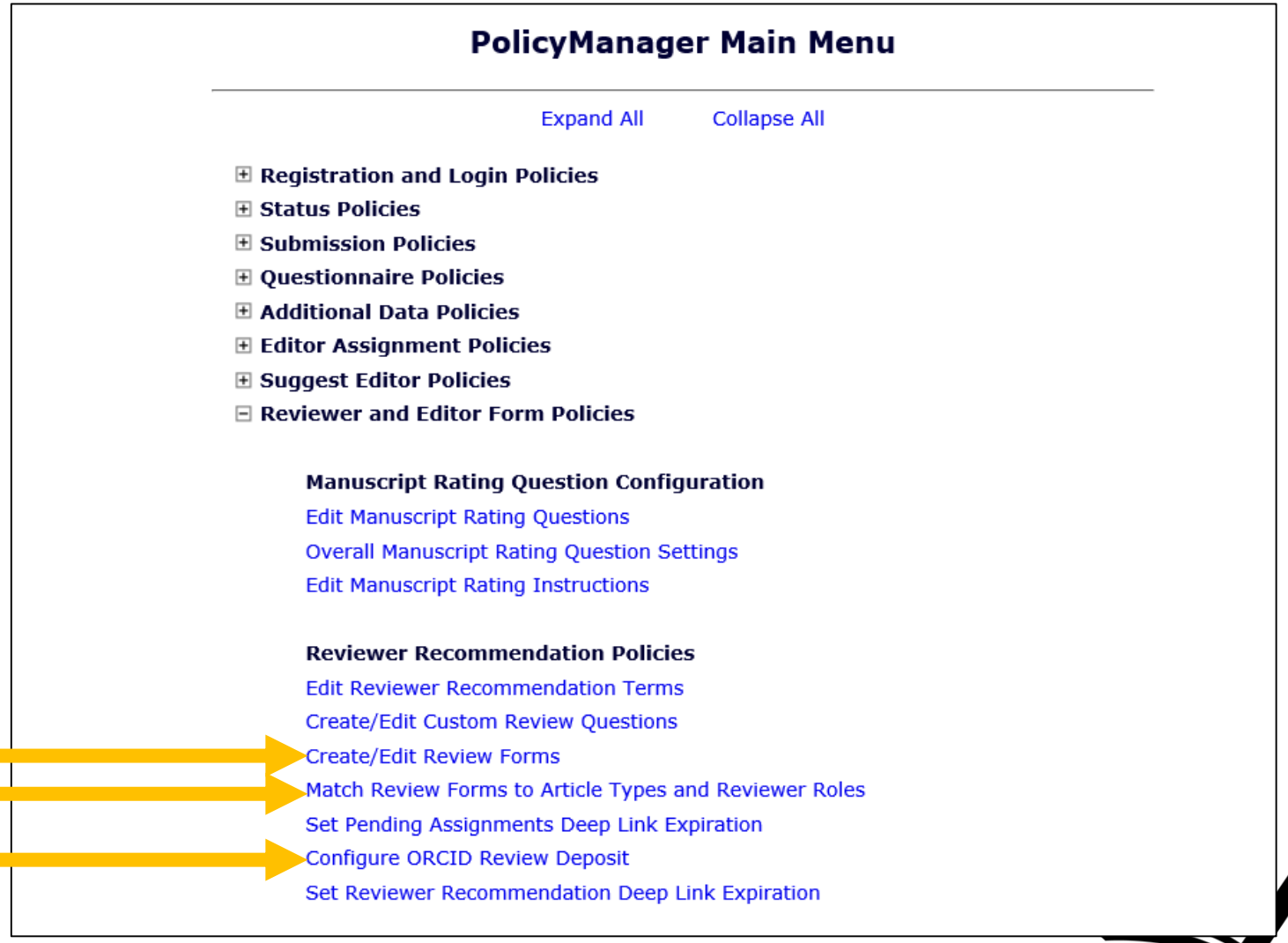
Authorization cannot be granted in proxy mode

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

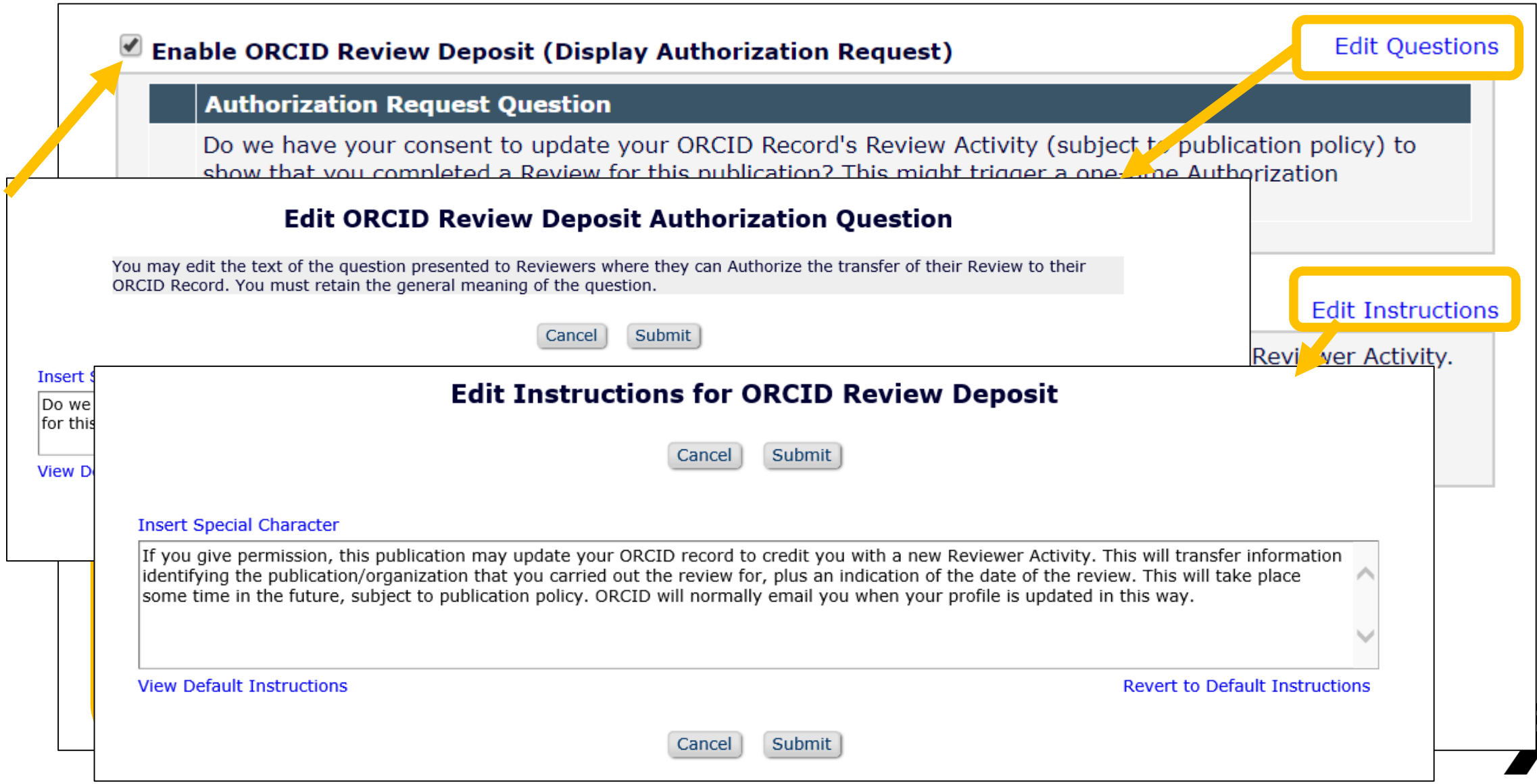


Configuration: Enabling Review Deposit

- 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



Configuration: Create/Edit Review Form



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 Monday
- (•) Monthly on the ( ) First (•) Last day of the month
- ( ) Every [ ] months, commencing [ ] (mm/dd/yyyy)

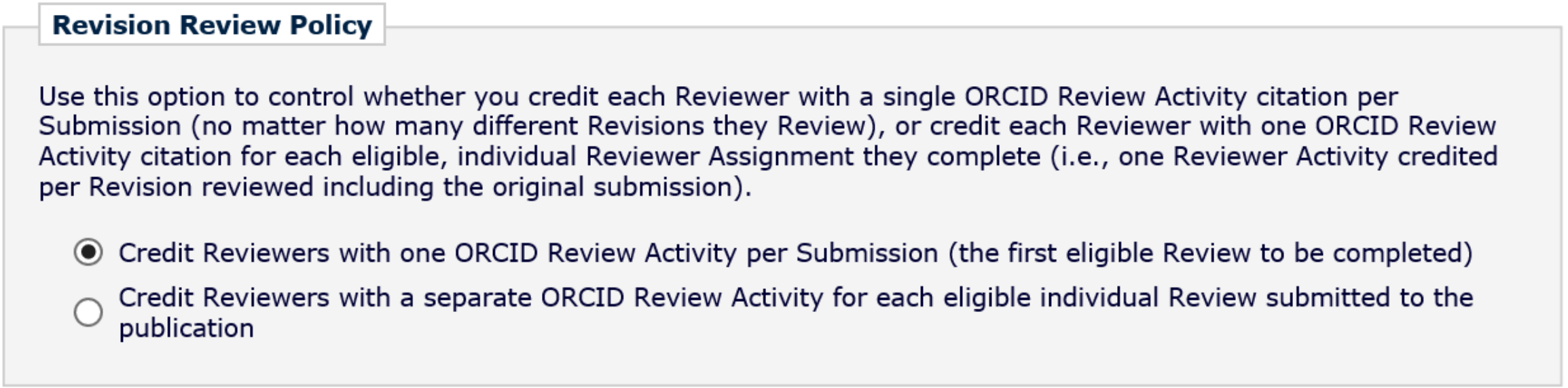
Choose when eligible Reviews should be considered ready to deposit: in the batch following their completion or in the batch after the associated submission reaches a specific milestone. If you configure a Rating condition below, Reviews will not be deposited before an Editor assigns a Review Rating.

- (•) 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

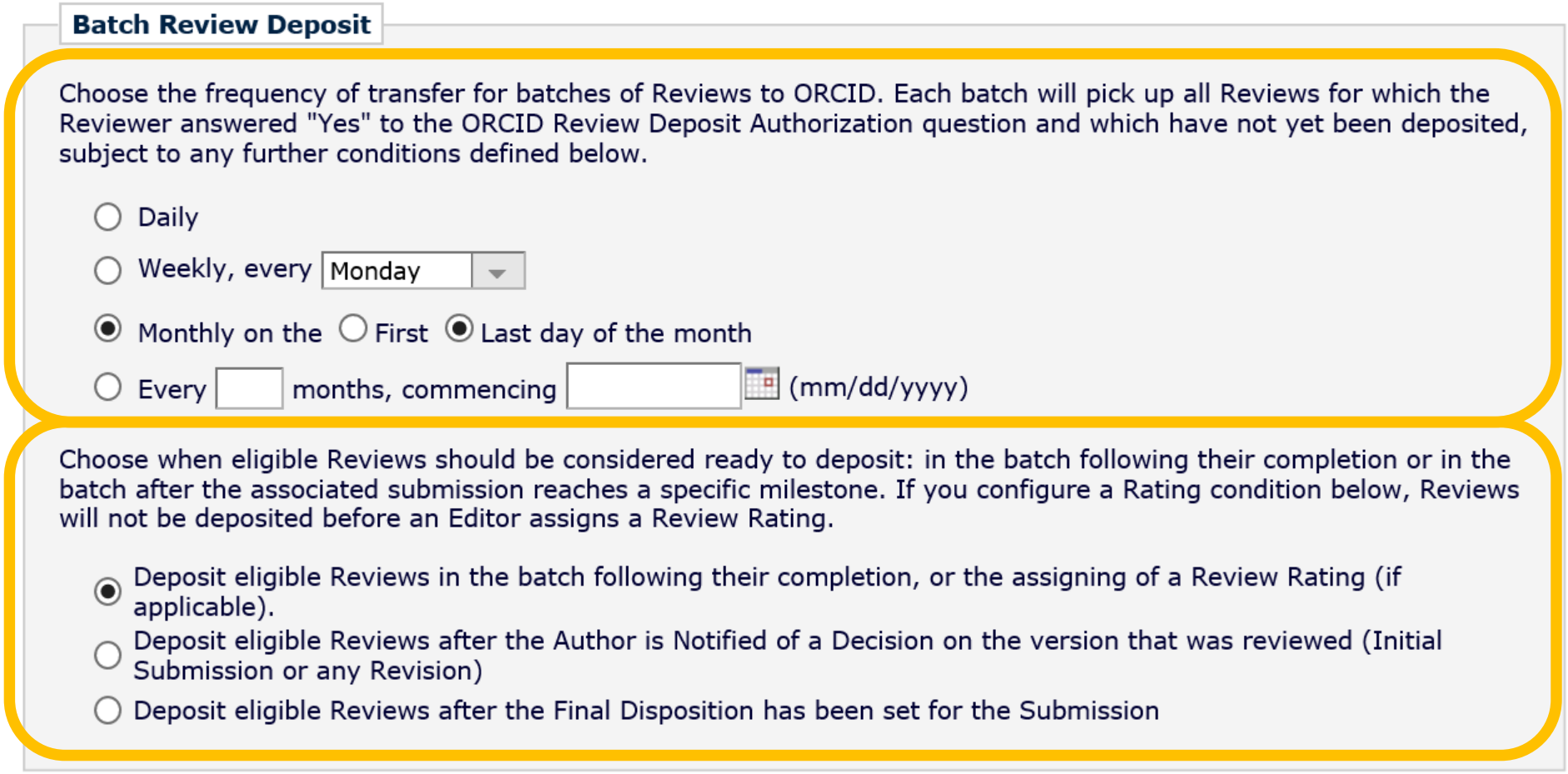
Configuration: Configure ORCID Review Deposit

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



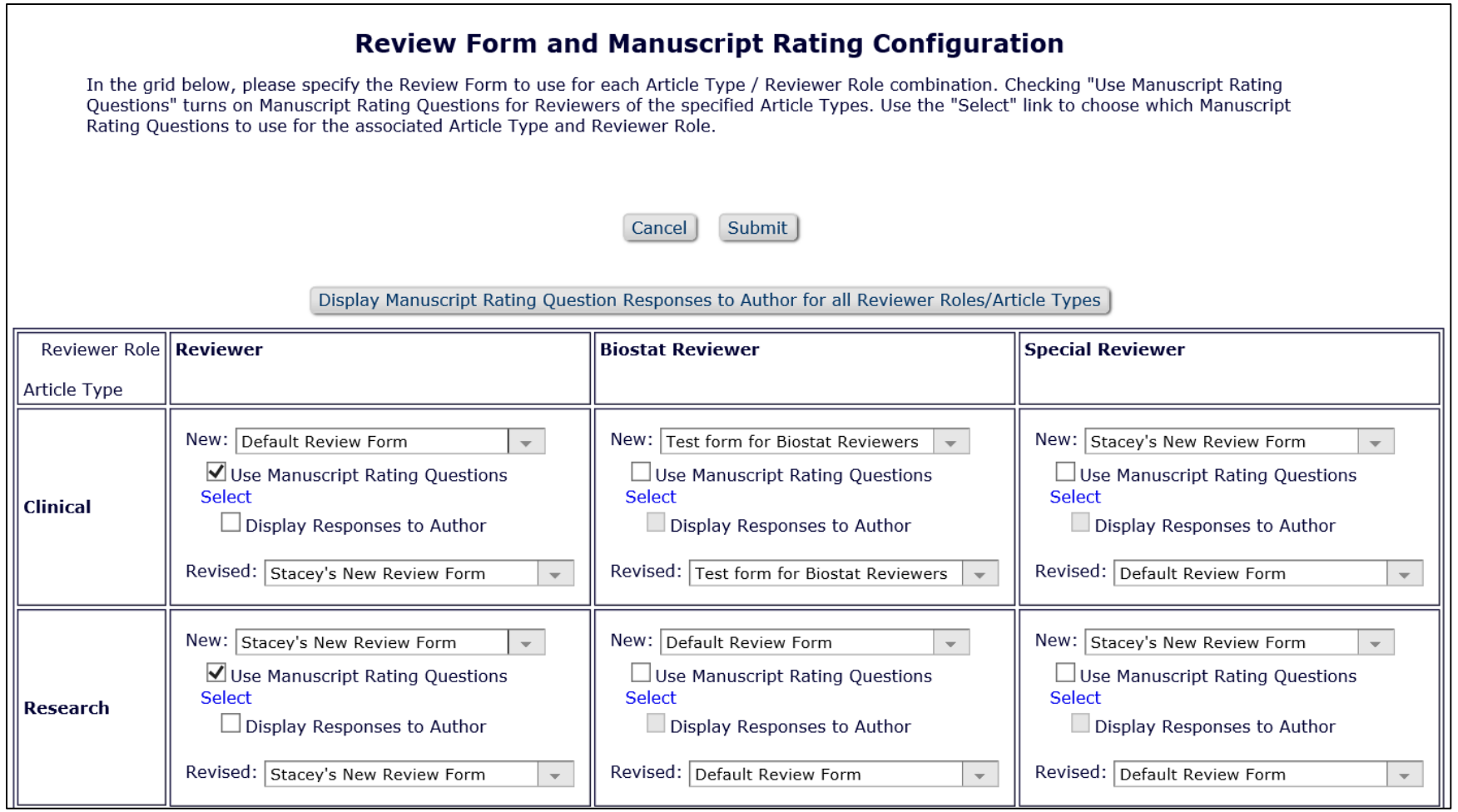
Configuration: Deposit Schedule

- 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



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.

Cancel Submit

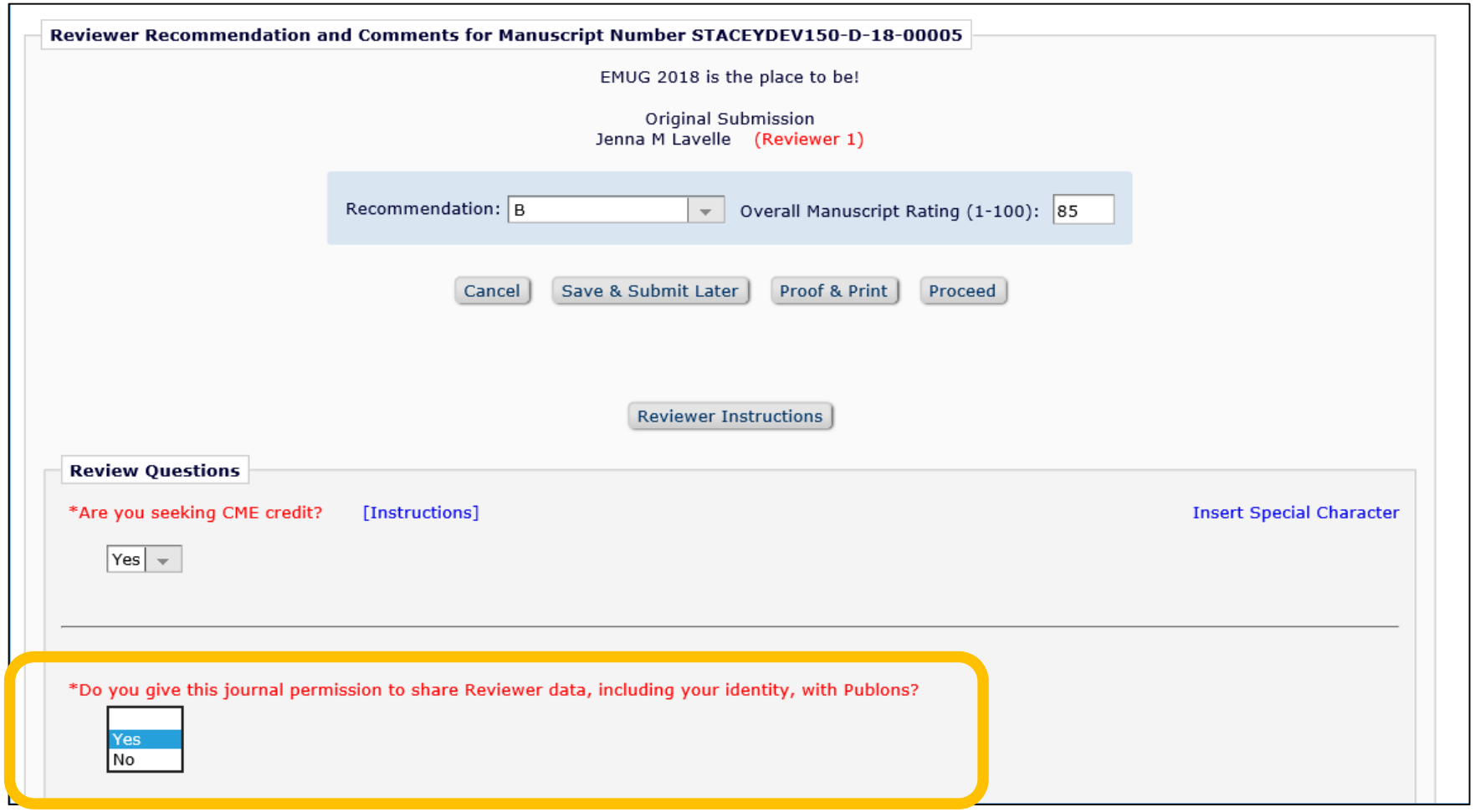
Display Manuscript Rating Question Responses to Author for all Reviewer Roles/Article Types

Reviewer Role / Article Type	**Reviewer**	**Biostat Reviewer**	**Special Reviewer**
Clinical	New: Default Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Stacey's New Review Form	New: Test form for Biostat Reviewers ☐ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Test form for Biostat Reviewers	New: Stacey's New Review Form ☐ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form
Research	New: Stacey's New Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Stacey's New Review Form	New: Default Review Form ☐ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form	New: Stacey's New Review Form ☐ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form

EM Integration with other Reviewer Recognition Services

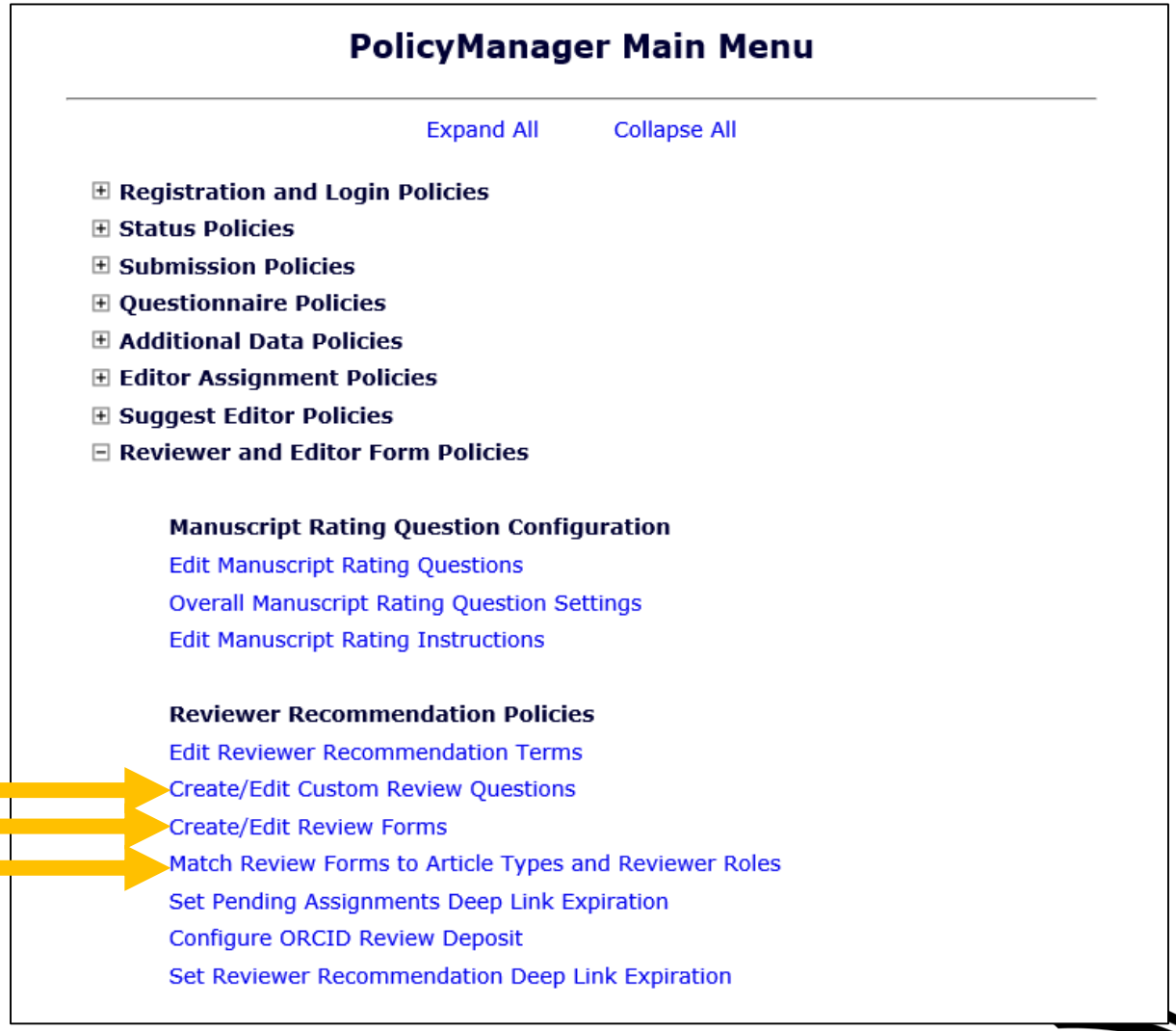
Opt-in Question on Review Form

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



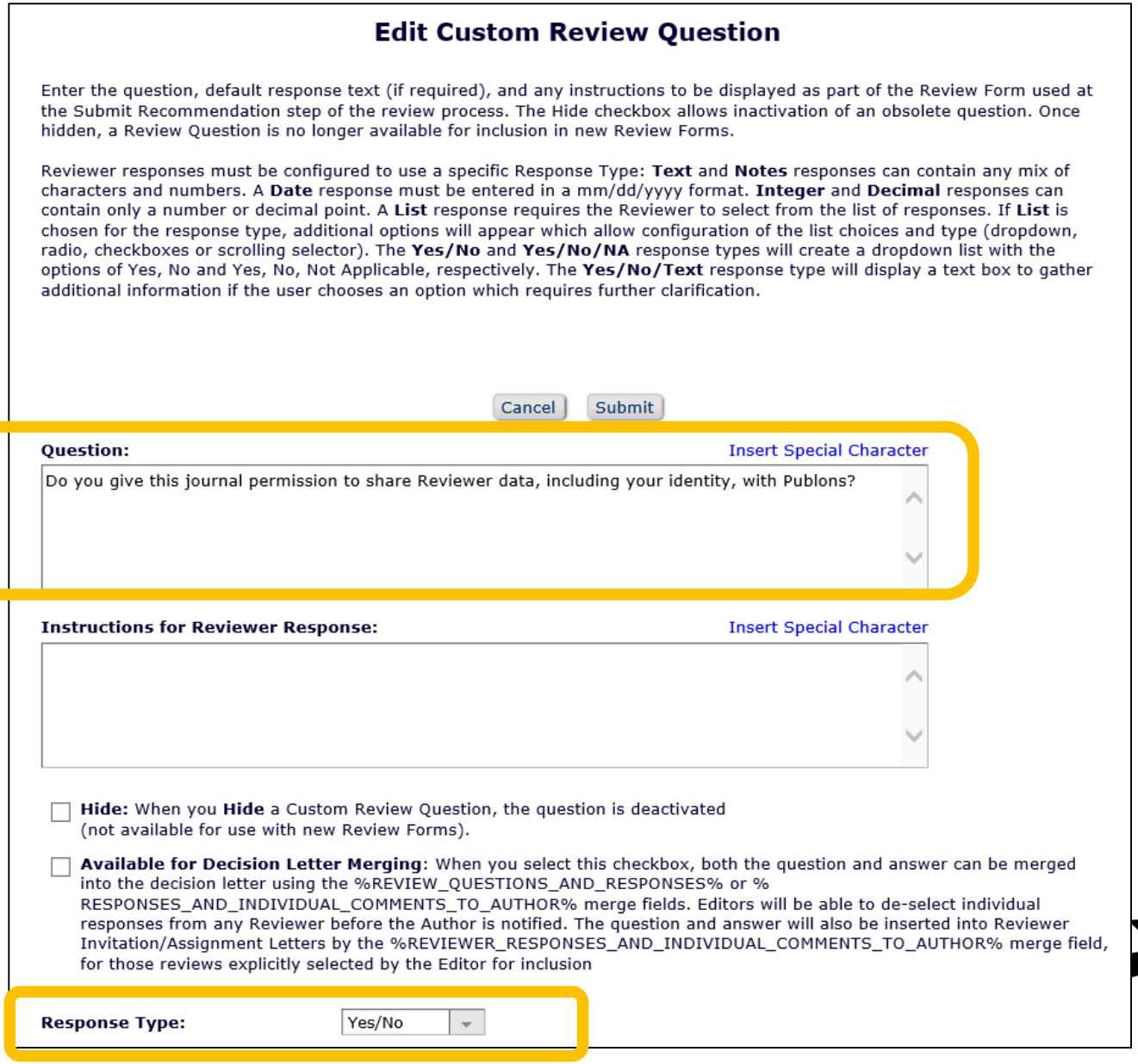
Configuration: PolicyManager

- 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



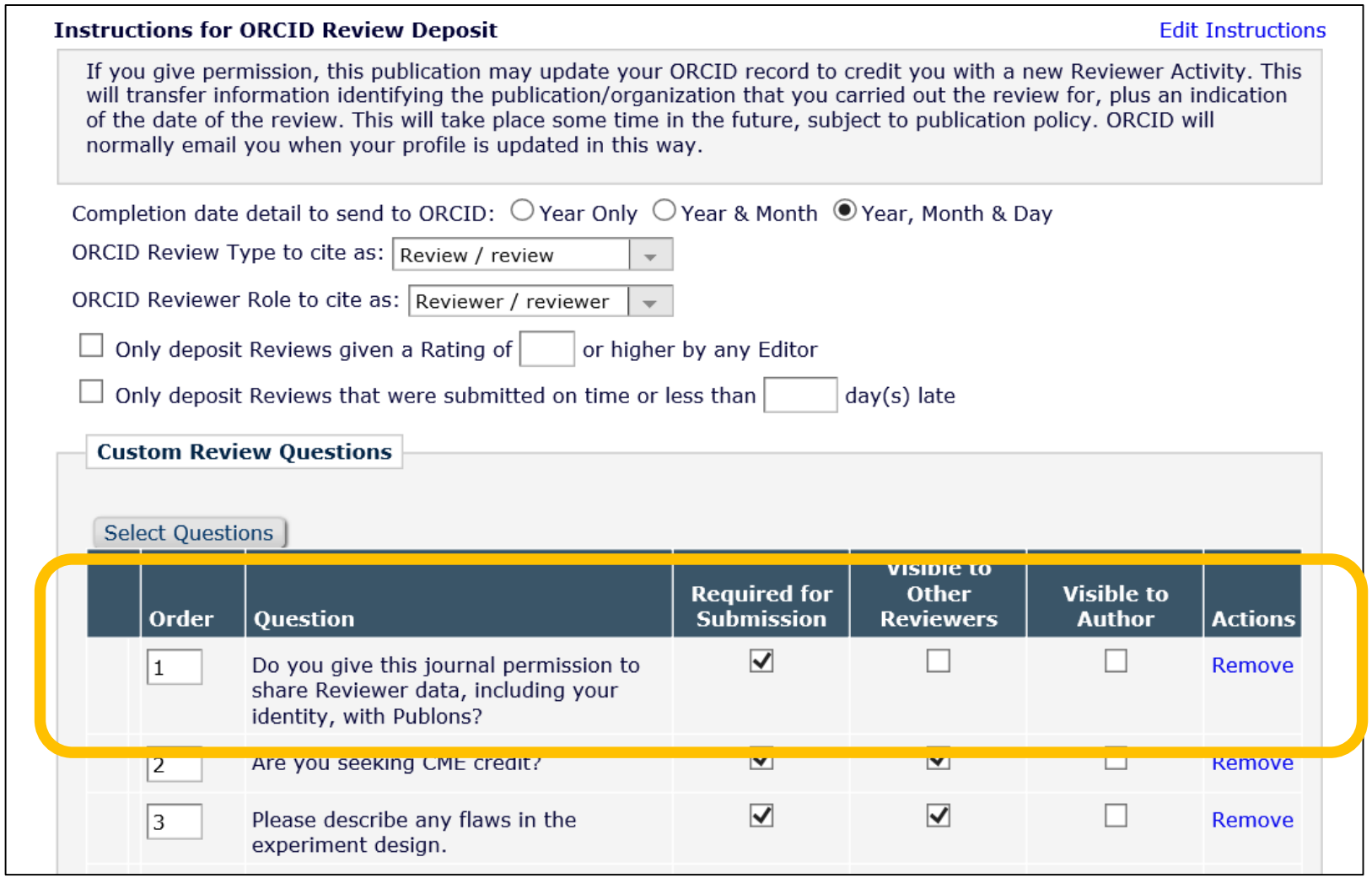
Configuration: Create/Edit Custom Review Question

- Create custom question for 'opt in' permission to send completed review to Publons
- 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: Review / review

ORCID Reviewer Role to cite as: Reviewer / reviewer

☐ 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
	1	Do you give this journal permission to share Reviewer data, including your identity, with Publons?	☑	☐	☐	Remove
	2	Are you seeking CME credit?	☑	☑	☐	Remove
	3	Please describe any flaws in the experiment design.	☑	☑	☐	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.

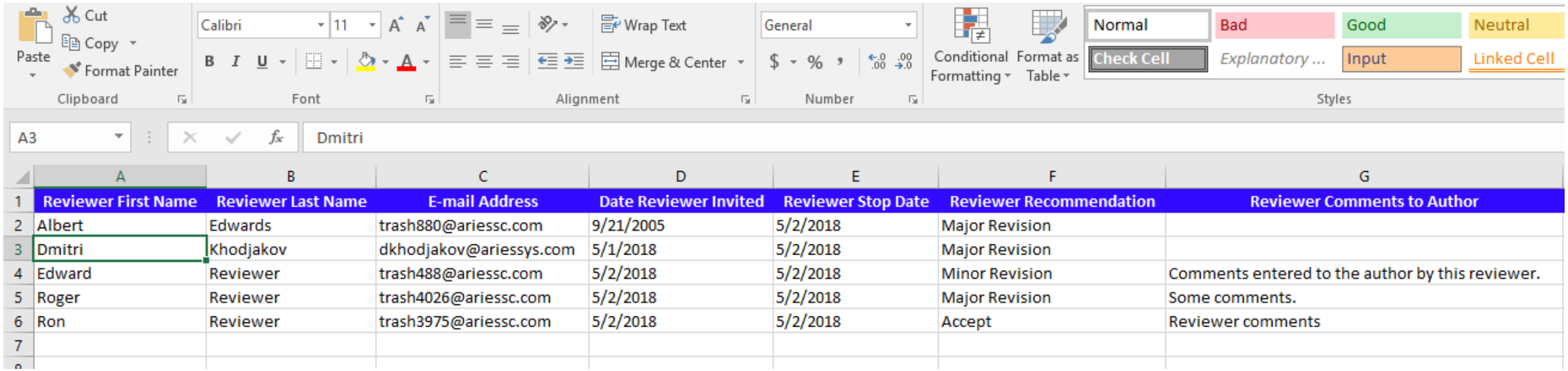
Cancel Submit

Display Manuscript Rating Question Responses to Author for all Reviewer Roles/Article Types

Reviewer Role / Article Type	**Reviewer**	**Biostat Reviewer**	**Special Reviewer**
Clinical	New: Default Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Stacey's New Review Form	New: Test form for Biostat Reviewers ☐ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Test form for Biostat Reviewers	New: Stacey's New Review Form ☐ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form
Research	New: Stacey's New Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Stacey's New Review Form	New: Default Review Form ☐ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form	New: Stacey's New Review Form ☐ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form

Set up Publons Report

Publons Report: Sample Results

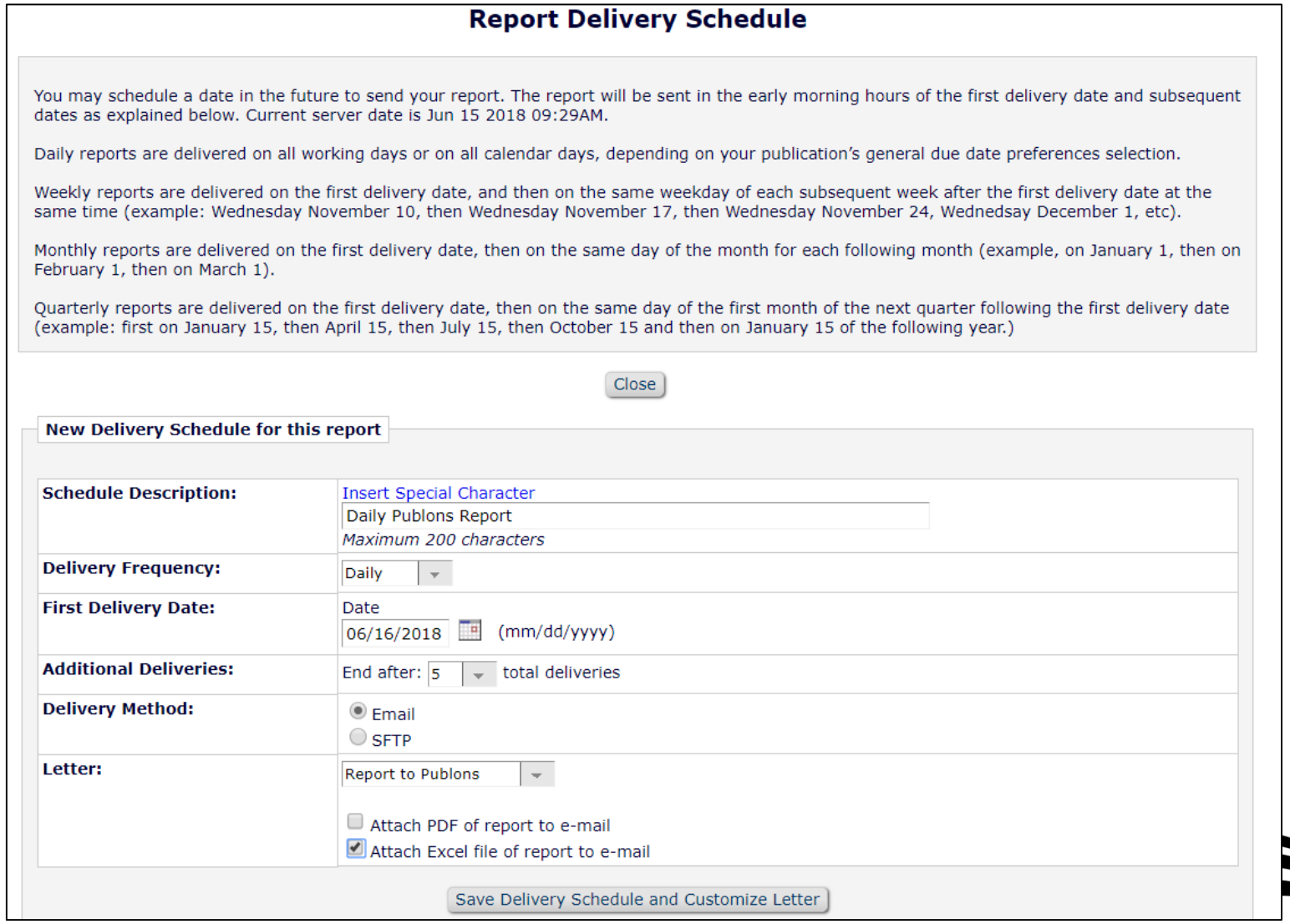


	A	B	C	D	E	F	G
1	Reviewer First Name	Reviewer Last Name	E-mail Address	Date Reviewer Invited	Reviewer Stop Date	Reviewer Recommendation	Reviewer Comments to Author
2	Albert	Edwards	trash880@ariessc.com	9/21/2005	5/2/2018	Major Revision	
3	Dmitri	Khodjakov	dkhodjakov@ariessys.com	5/1/2018	5/2/2018	Major Revision	
4	Edward	Reviewer	trash488@ariessc.com	5/2/2018	5/2/2018	Minor Revision	Comments entered to the author by this reviewer.
5	Roger	Reviewer	trash4026@ariessc.com	5/2/2018	5/2/2018	Major Revision	Some comments.
6	Ron	Reviewer	trash3975@ariessc.com	5/2/2018	5/2/2018	Accept	Reviewer comments
7							

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

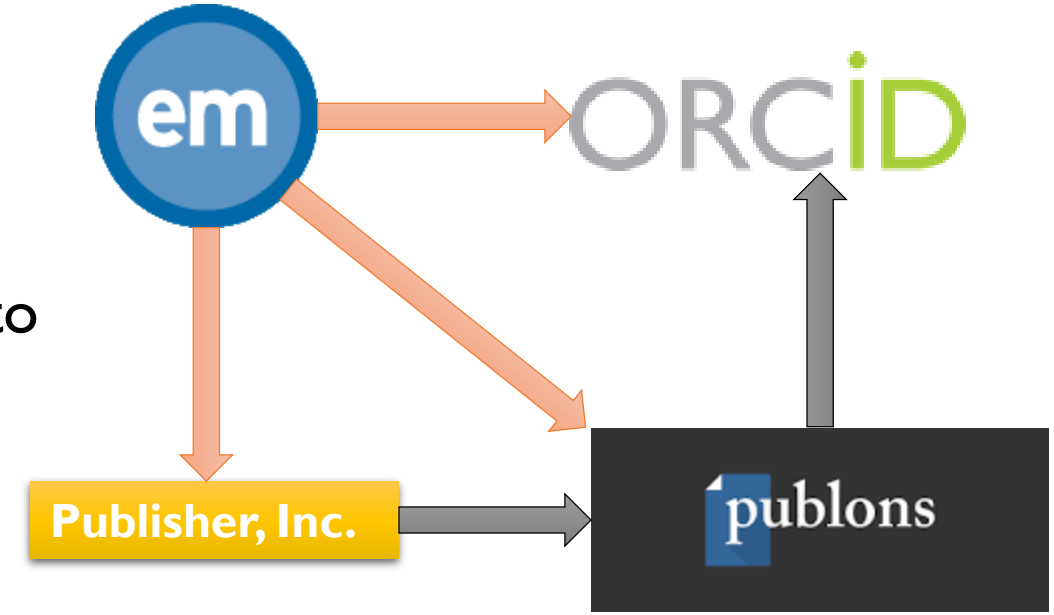
Publons Report: Schedule Delivery

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



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?