

Welcome to EEMUG 2018

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Co-Author Workflows

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Co- Author Workflows: Agenda

- Contributing Author Verification
- Co-Author Reminder Reports
- Set Other Author Parameters
- Custom Details Pages: Author Information
- Requesting ORCID IDs
- CRedit
- Author List changes

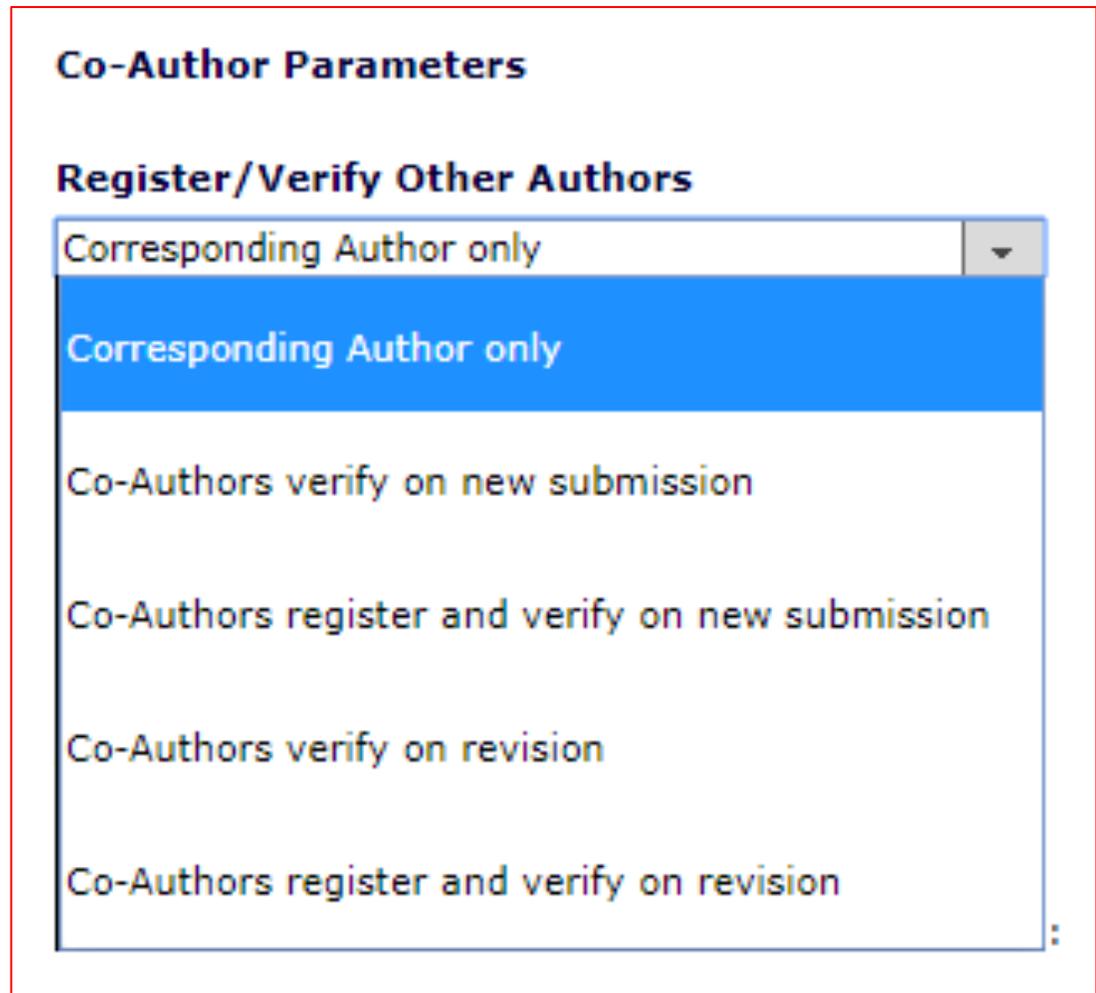
Contributing Author Verification



Contributing Author Verification

- Publications can request and capture **additional contributing Author information**
- A contributing author may also be requested to **verify** that they are a contributor to a new or revised manuscript
- If the Editorial Office chooses, you can require **registration** for all authors
- This is set by **Article Type**
- Editors given the appropriate **permissions to manage** the contributing Author information
- Corresponding Authors if given the appropriate permission may to view the verification status of their co-authors

Verify Authors: Corresponding Author Only



Policy Manager> Submission Policies> Edit Article Types> [Edit] Desired article type> Co-Author Parameters

“**Corresponding Author Only**” is the default setting for any new Article Type, and is used where no co-author validation is required

- When this setting is selected, Other Authors may be entered by the Corresponding Author, but those Other Authors are not asked to confirm their contribution
- The “Notify Other Authors” event and letters are not triggered for any submission of an Article Type with this setting

Verify Authors: Co-Authors verify on new submission

Co-Author Parameters

Register/Verify Other Authors

Co-Authors verify on new submission

Corresponding Author only

Co-Authors verify on new submission

Co-Authors register and verify on new submission

Co-Authors verify on revision

Co-Authors register and verify on revision

Policy Manager> Submission Policies> Edit Article Types> [Edit] Desired article type> Co-Author Parameters

“**Co-Authors verify on new submission**” is used where the publication would like co-authors to confirm their association with the submission when first submitted to the publication, but does not require them to be fully registered

- If this choice is configured for the Article Type selected for a new submission, upon clicking the 'Approve Submission' link, ***the “Notify Other Authors” event is triggered and letters are sent to the Other Authors***

Verify Authors: Co-Authors register and verify on new submission

Co-Author Parameters

Register/Verify Other Authors

Co-Authors register and verify on new submission ▾

Corresponding Author only

Co-Authors verify on new submission

Co-Authors register and verify on new submission

Co-Authors verify on revision

Co-Authors register and verify on revision :

Policy Manager> Submission Policies> Edit Article Types> [Edit] Desired article type> Co-Author Parameters

“**Co-Authors register and verify on new submission**” is used where the publication would like every author to be fully registered with their EM system

- If this choice is configured for the Article Type selected for a new submission, upon clicking the 'Approve Submission' link, the “Notify Other Authors” event is triggered and letters are sent to the Other Authors
- This also allows the registered co-authors to track the submission status information through the editorial process

Verify Authors: Co-Authors register and verify on new submission

Co-Author Parameters

Register/Verify Other Authors

Co-Authors register and verify on new submission ▾

Corresponding Author only

Co-Authors verify on new submission

Co-Authors register and verify on new submission

Co-Authors verify on revision

Co-Authors register and verify on revision :

Policy Manager > Submission Policies > Edit Article Types > [Edit] Desired article type > Co-Author Parameters

“**Co-Authors verify on revision**” is used where the publication would like co-authors to confirm their association with the revised submission when the first revision is submitted to the publication, but does not require them to be fully registered

- If this choice is configured for the Article Type selected for a revised submission, then upon clicking the '**Approve Revision**' link, the “Notify Other Authors” event is triggered and letters are sent to the Other Authors

Verify Authors: Co-Authors register and verify on new submission

Register/Verify Other Authors

Co-Authors register and verify on revision

Corresponding Author only

Co-Authors verify on new submission

Co-Authors register and verify on new submission

Co-Authors verify on revision

Co-Authors register and verify on revision

Policy Manager> Submission Policies> Edit Article Types> [Edit] Desired article type> Co-Author Parameters

“**Co-Authors register and verify on revision**” is used where the publication would like every author to be fully registered with their EM system

- If this choice is configured for the upon clicking the '**Approve Revision**' link, the “Notify Other Authors” event is triggered and letters are sent to the Other Authors
- This also allows the registered co-authors to track the submission status information through the editorial process

Contributing Author questionnaires

Publications may have questions that are geared towards authors specifically – such as a statement of competing interests – you can have your contributing authors answer questions individually as follows:

- Create your questions
- Collate your author questions onto one “Author” questionnaire
- Policy Manager> Questionnaire Policies (to create your questions and questionnaire)
- Configure the site to present verifying authors – with the author questionnaire also to capture their individual answers
- Policy Manager> Submission Policies> Edit Article Types> (to set your questionnaire against relevant article types & set it to be presented to verifying contributing authors)

Contributing Author Questionnaires: Options

Configure Questionnaire

Enter a name for the Questionnaire in the 'Questionnaire Name' field. Custom Questions may be added to the Questionnaire by clicking the 'Add Custom Questions' button, selecting Custom Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save the Questionnaire and return to the Create Questionnaire page. Click the 'Remove' link to remove questions from the questionnaire.

Questions that are hidden are displayed in gray text. For multi-part questions, only the Custom Metadata ID associated with the Initial Question is displayed.

The %AUTHOR_QUESTIONNAIRE_SUBSET% merge field pulls in all of the selected Questions and Responses for all Authors on the submission (including the Corresponding Author). To specify questions/responses for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all questions you want to include. Note the %AUTHOR_QUESTIONNAIRE% merge field continues to pull in all questions and responses for the questionnaire.

Questionnaire Name: (50 characters maximum)

Hide When you **Hide** a Questionnaire, it will not be available for use.

Question Display Order:

Order	Question	Custom Metadata ID	Required	Include in Merge Field	Actions
<input type="text" value="1"/>	Do you really like it?		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Remove
<input type="text" value="2"/>	Is it, is it Wicked?		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove

Contributing Author Questionnaire: Edit Article Types Settings

Co-Author Parameters

Register/Verify Other Authors

Co-Authors register and verify on new submission

Authenticated ORCID iD Request:

Display Author Questionnaire to Co-Authors

Classifications" Preferences:	<input type="text" value="Optional"/>	<input type="text" value="Optional"/>
Set "Additional Information" Preferences:		
Designate Submission Questionnaire:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Designate Author Questionnaire:	<input type="text" value="CoAuthor Questionnaire"/>	<input type="text" value="CoAuthor Questionnaire"/>
Set "Enter Comments" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Optional"/>
Set "Suggest Reviewers" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set "Oppose Reviewers" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set "Respond to Reviewers" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set "Request Editor" Preferences:	<input type="text" value="Required"/>	<input type="text" value="Hidden"/>
Set "Select Region of Origin" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set "Waiver Request" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>

Contributing Author confirmation

Using the Yes I am affiliated link – produces this screen – where Authors must click “Submit to Publication” to complete verification

[Insert Special Character](#)

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

[Print](#)

Verify Contributing Authorship

This publication requests that Authors link to their ORCID record 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: [0000-0002-1326-0245](#) (Not Authenticated)

[Link to ORCID Record](#)

[Submit to Publication](#)

Edit Article types: Submission vs Author Questionnaires

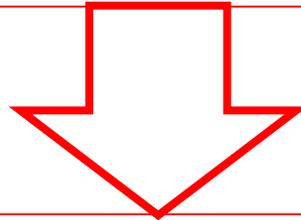
Create Questionnaire

Create a new Questionnaire by clicking the 'Add' button below.
Questionnaires displayed here may be configured for use with Article Types or Production Tasks.

Author Questionnaire
Sample Questionnaire

Remove
Remove

Edit
Edit



Set "Additional Information" Preferences:

Designate Submission Questionnaire:

Sample Questionnaire ▼

Sample Questionnaire ▼

Designate Author Questionnaire:

Author Questionnaire ▼

Author Questionnaire ▼

Author vs Submission Questionnaire

Questionnaire Name:
(50 characters maximum)

Hide When you **Hide** a Questionnaire, it will not be available for use.

Question Display Order:

Order	Question	Required	Include in Merge Field	Actions
<input type="text" value="1"/>	Custom questions can have pre-populated responses configured by the journal?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
<input type="text" value="2"/>	Custom questions and responses can also appear on the Transmittal Form?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
<input type="text" value="3"/>	§ What other options are there?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove

Questionnaire Name:
(50 characters maximum)

Hide When you **Hide** a Questionnaire, it will not be available for use.

Question Display Order:

Order	Question	Required	Include in Merge Field	Actions
<input type="text" value="1"/>	If you have submitted this manuscript to another publication please give details below	<input type="checkbox"/>	<input type="checkbox"/>	Remove
<input type="text" value="2"/>	Please enter the date you submitted the paper to another publication.	<input type="checkbox"/>	<input type="checkbox"/>	Remove



Article Type Selection



Attach Files



Review Preferences



Additional Information



Manuscript Data

Please respond to the presented questions/statements.

[Insert Special Character](#)

Questionnaire

Custom questions can have pre-populated responses configured by the journal?

Answer Required:

Character Count: 141

Yes it can. This means that the journal can provide a selection of responses and ask the Author to delete those responses that do not apply. Limit 20000 characters

Custom questions and responses can also appear on the Transmittal Form?

- Please select a response
- Yes
- No

What other options are there?

Instructions

Answer Required:

Help Information

If you have submitted this manuscript to another publication please give details below

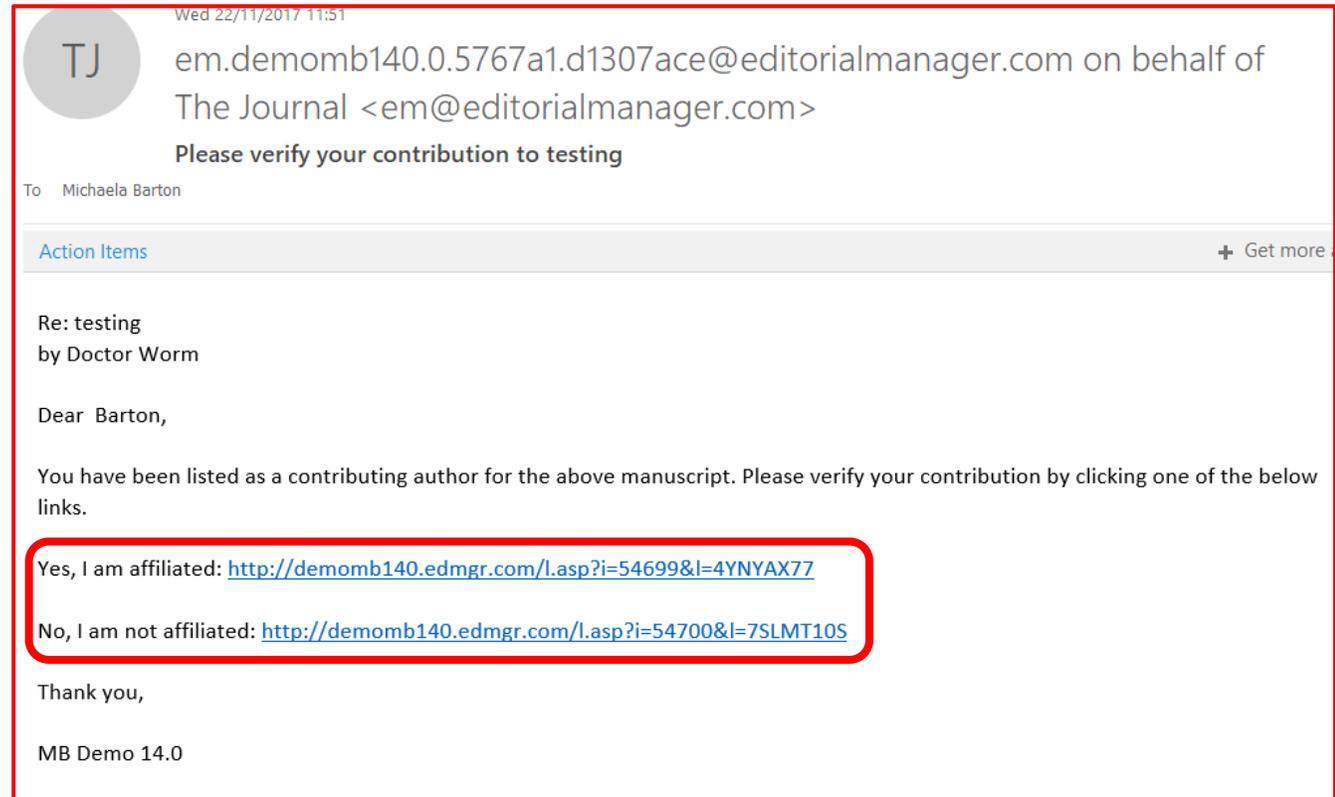
Co-Authors verify on new submission: Mergefields

%OTHERAUTH_VERIFY_DEEP_LINK%

Inserts a hyperlink in a letter that allows a Co-Author to respond “Yes, I am affiliated.” & tells the system they have verified as a contributing Author

%OTHERAUTH_DECLINE_DEEP_LINK%

Inserts a hyperlink in a letter that allows a co-author to respond “No, I am not affiliated.” & Tells the system they declined attribution as an author for this article



Contributing Author Confirmation: Co-Author Questionnaire

[Insert Special Character](#)

Verify Contributing Authorship

If you are unable to complete your responses at this time, please click on the "Save for Later" button to save your work. To return to this page later, click on the Verify deep link in the email that you were sent regarding this submission, or save the following URL and enter it in your browser's address bar.

<http://www.editorialmanager.com/demomb141/l.asp?i=54654&l=YA8J7B46>

This publication requests that Authors link to their ORCID record 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 Record](#) [What is ORCID?](#)

Contributing Author Confirmation: Co-Author Questionnaire (2nd half of page)

Please respond to the questions/statements below and click on the "Submit to Publication" button to complete your Co-Author verification for the submission.

If you do not submit your responses, your contribution will not be confirmed. If you click on the "Save for Later" button, your contributing authorship will not be confirmed, but you can return to this page later to complete your responses.

Do you really like it?

Answer Required: Please select a response.

Is it, is it Wicked?

Answer Required: Please select a response.

Cancel

Save for Later

Submit to Publication

Contributing Author Confirmation

Upon clicking Submit to Publication the author is presented with a confirmation page and notification that they can track the submission.

Contributing Author Confirmation

Thank you for verifying your contributing authorship on "Aries Systems Corporation" submitted by Doctor Worm.

You may view the submission on which you are a co-author in your "Submissions Being Processed" or "Revisions Being Processed" folder.

[Author Main Menu](#)

Contributing Author View of Submitted Article

When a Contributing Author successfully logs in after verifying their contribution to a submission (using the deep link sent in their verify author letter), they are given access to view the status of the submission as it goes through the editorial process.

Submissions Being Processed for Author Michaela Barton

Page: 1 of 1 (1 total submissions)

Display 10 results per page.

Action	Manuscript Number	Title	Authorship	Initial Date Submitted	Status Date	Current Status
View Submission	ABBEY174	Aries Systems Corporation	Other Author	05 Dec 2017	05 Dec 2017	Manuscript Submitted

Page: 1 of 1 (1 total submissions)

Display 10 results per page.

Verified Contributing Authors: Editorial Office View

Other Author Status									
Order	Author Name	Added in Revision	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options	
			@edmgr.com	0000-0002-1326-0245 ?			Yes	Reset Confirmation Status View Author Details	
							22 Nov 2017		

Corresponding Author Status						
Order	Author Name	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	Doctor Worm		0000-0001-5105-7742 ?			View Author Details

Other Author Status								
Order	Author Name	Added in Revision	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
2	Michaela Barton	R0	mbarton@edmgr.com Edit	0000-0002-1326-0245 ?			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](#)

E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
mbarton@edmgr.com Edit	0000-0002-1326-0245 ?			Declined:	Reset Confirmation Status View Author Details
				22 Nov 2017	



Authors and Editors with Permission to Edit Contributing Author Email addresses

- Corresponding Authors and Editors may be given permission to update Co-Author Email Addresses directly from the Author Details page
- **To Configure for Editors:** Role Manager> Editor Roles>click 'Edit' next to the Editor Role you wish to grant the permission >Select/Check the 'Edit Other Author Email Address' sub-permission to enable Editors to edit Co-Author Email Addresses from the Author Details page
- **To configure for Authors:** Role Manager > Author Role click Edit> Select Manage Other Authors and the sub permission to Edit Other Author E-mail Address
- The-email address is only updated on the Submission record, not on the Co-Author's People Record
- This means an editor does not have to “edit submission” to update an authors email address

Other Author Status								
Order	Author Name	Added in Revision	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
▲ ▼	▲ ▼	▲ ▼				▲ ▼	▲ ▼	
2	Rabbit Man <i>New</i>	R1-Doctor Worm	rman@trash.com Edit	0000-0002-7642-2598			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.

Co-Author Reminder Reports



Co-Author Reminder reports

- The 'Co-Author Reminder Report' allows the Editor to search for a list of Co-Authors who have been sent letters asking for their verification co-authorship on a submission but have not yet responded
- The search can be run by the number of days since the verification request was sent, or where verification requests were sent in a specified timeframe
- Results can be limited by Handling Editor or First Assigned Editor, or further limited by Article Type and/or Section/Category if desired

Author Reminder Reports

[Co-Author Reminder Report](#)

[Author Revision Status Report](#)

[Author Revision Reminder Report](#)

[Automated Author Revision Reminder Report](#)

Co-Author Reminder Reports

Display outstanding requests for verification sent or more days ago.

Display outstanding requests for verification sent between and
(mm/dd/yyyy)

First Assigned Editor:

Handling Editor:

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

Article Type:

Section/Category:

[Select All](#)
[Clear All](#)

[Select All](#)
[Clear All](#)

Co-Author Reminder Report

Content: All Co-Author verification requests that have been outstanding for 1 or more days.

Check the checkbox if you want to send a reminder to the Co-Author for that submission. You will have the opportunity to customize the individual reminder letters after clicking the 'Send Reminders' button.

[Check All](#) [Clear All](#)

Page: 1 of 3 (28 total submission records)

1 2 3 >> >|

Display results per page.

Send Reminder	Manuscript Number	Article Type	Article Title	Editorial Status	Co-Author Name	Co-Author E-mail Address	First Assigned Editor	Handling Editor	Initial Date Submitted	Date Revision Submitted	Date Verification Request Sent	Elapsed Days	Date Last Reminder Sent	Total # Reminders Sent
<input type="checkbox"/>	JOURNALA-D-16-00010 Details History	Original Study	"Thickly Studded Oriental Archipelagoes": Identifying references to Oceans in Moby-Dick	Editor Invited	Leonard S. Thompson	trash1@ariessys.com	Clyde Stratton	Clyde Stratton	12/08/2015		12/08/2015	716		0
<input type="checkbox"/>	JOURNALA-D-16-00003 Details History	Original Study	The Critical Reception of Herman Melville in the East	With Editor	Jared Brown	trash1@ariessys.com	Bronwyn Taylor	Bronwyn Taylor	12/08/2015		12/08/2015	716		0
<input type="checkbox"/>	JOURNALA-D-16-00003 Details History	Original Study	The Critical Reception of Herman Melville in the East	With Editor	Darby Bergeron	trash2@ariessys.com	Bronwyn Taylor	Bronwyn Taylor	12/08/2015		12/08/2015	716		0
<input type="checkbox"/>	JOURNALA-D-16-00021 Details	Original Study	Coumadin for long term treatment of Atrial Fibrillation	Completed Reject	Alison O'Connell	aoconnell@ariessys.com	Randi Williams		02/04/2016		02/04/2016	658		0

Co-Author Reminder Report

Select a letter to send to the Co-Author(s).

Co Author Reminder Letter

Please Choose a Letter

Author Reminder - Inv. Manuscript - After Due Date

Author Reminder - Invited Manuscript

Author Reminder Inv. Manuscript - Before Due Date

Author Revision Subsequent Reminder

Co Author Reminder Letter

Set Reminder E-mail Delivery Time

You may schedule a date and time in the future to send your reminder e-mail letters.

Note that the letters will be sent on the date and time of the server and must be scheduled on or after the current server date and time below.

Current server date and time is: 11/23/2017 6:53 AM

Delivery Date: 

Delivery Time: Hour Minute AM/PM
 AM

Cancel

Submit

Send Reminder Letters Now

Reminders Confirmation

Your reminders will be sent immediately.

[Back to Co-Author Reminder Report](#)

[Back to Reports](#)

[Back to Main Menu](#)



Set Other Author Parameters

Collecting more information about your
authors

Set Other Author Parameters

- Publications can request additional information for Other Authors during the Add/Edit/Remove Author step
- This information can be made mandatory to complete a submission
- Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'
- Policy Manager > Submission Policies > Set Other Author Parameters

The screenshot shows a web interface for adding authors. At the top, a grey box contains the text: "Please Add, Edit, or Remove Authors". Below this, a larger grey box provides instructions: "Enter the names of anyone who contributed to your manuscript by clicking 'Add Author'. The order of the authors may be changed by updating the number in the 'Order' column then clicking 'Update Author Order'. The first author of the manuscript may be indicated." Below the instructions, there is a "Current Author List" section with a table header "Doctor Wor" and a "+ Add Another Author" button. The main focus is the "Enter Author Details" modal window, which contains the following fields and options:

- Given/First Name***: Text input field
- Middle Name**: Text input field
- Family/Last Name***: Text input field
- Academic Degree(s)**: Text input field
- Affiliation**: Text area
- E-mail Address***: Text input field
- ORCID**: Text input field with a "Fetch" button and a link "What is ORCID?"
- Options**: Four checkboxes:
 - This is the corresponding author
 - Deceased Status
 - Equal Contribution Status
 - Post-Publication Corresponding Author

Policy Manager: Submission Policies > Set Other Author Parameters

Other Author Parameters

		Include in Merge Field?
Set "Title" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Given/First Name	Required	<input type="checkbox"/>
Set "Secondary Given/First Name" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Middle Name" Text Entry Box Preference:	Optional	<input type="checkbox"/>
Family/Last Name	Required	<input type="checkbox"/>
Set "Secondary Family/Last Name" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Academic Degree(s)" Text Entry Box Preference:	Optional	<input type="checkbox"/>
Set "Secondary Academic Degree(s)" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Affiliation" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "E-mail Address" Text Entry Box Preference:	Required	<input type="checkbox"/>
<input checked="" type="checkbox"/> Require unique e-mail addresses for all authors of a submission		
Set "ISNI" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "ORCID" Text Entry Box Preference:	Optional	<input type="checkbox"/>
Set "PubMed Author ID" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "ResearcherID" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Scopus Author ID" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Position" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Secondary Position" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Institution" Text Entry Box Preference:	Required	<input type="checkbox"/>

Set "Department" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Secondary Institution" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Secondary Department" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Street Address" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Secondary Street Address" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "City" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Secondary City" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "State" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Secondary State" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Zip or Postal Code" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Country" Preference:	Hidden	<input type="checkbox"/>
Set "Contributor Roles" Preference:	Display	<input type="checkbox"/>
Set "Deceased Status" Checkbox Preference:	Hidden	<input type="checkbox"/>
Set "Equal Contribution Status" Checkbox Preference:	Hidden	<input type="checkbox"/>
Set "Post-Publication Corresponding Author" Checkbox Preference:	Hidden	<input type="checkbox"/>

Set Other Author Parameters: Affiliation vs. Institution

Affiliation

- A multi-line text box allowing for a “traditional” affiliation description e.g.

Aries Medical Center;

Special Guest Adjunct Professor of
Product Management

College of Product Management

Aries Systems University

Institution

- Can have “Institution Name Normalization” enabled (Policy Manager > General Policies> Enable Institution Name Normalization). This links to Ringgold for a standardised list of institutions in use on the system
- One line with just the institution Name i.e. Aries Systems Corporation

Institution Name Normalisation??

Verb: To clean, de-duplicate, and uniquely identify organizational records using the Ringgold Identifier. Standardised Institution listing for publication

To help create a scholarly supply chain where information and data about subscribers, authors, readers and content is able to flow easily and without confusion.

For the identification and disambiguation of organizational subscribers

- The Ringgold Identifier is a unique numerical identifier applied to organisations
- Updates periodically based on what abbreviations or names authors are using e.g. UCL vs. University College London (maintains its number)
- Authors can enter an institution that's not in the Ringgold database (which will later feed the database updates)
- Ringgold IDs available in JATS 1.1A



Set Other Author Parameters: Affiliation vs Institution

Set Other Author Parameters

You may request additional information about Other Authors entered on the **Add/Edit/Remove Authors** manuscript submission step. Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'. If your Publication chooses to require Other Author verification or registration for any Article Type, you may want to select E-mail or other address fields as required for all Other Authors so that you will have a means of contacting Other Authors. (more...)

Set "Affiliation" Text Entry Box Preference:	Required	<input type="checkbox"/>
Set "E-mail Address" Text Entry Box Preference:	Required	<input type="checkbox"/>
<input checked="" type="checkbox"/> Require unique e-mail addresses for all authors of a submission		
Set "ISNI" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "ORCID" Text Entry Box Preference:	Required	<input type="checkbox"/>
Set "PubMed Author ID" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "ResearcherID" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Scopus Author ID" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Position" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Secondary Position" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "Institution" Text Entry Box Preference:	Required	<input type="checkbox"/>
Set "Department" Text Entry Box Preference:	Hidden	<input type="checkbox"/>

Please Add, Edit, or Remove Authors

Enter the names of anyone who contributed to your manuscript by clicking 'Add Author'. The order of the authors may be changed by updating the number in the 'Order' column then clicking 'Update Author Order'. The first author of the manuscript may be indicated.

Current Author List	Enter Author Details
<p>Doctor Wor</p> <p>+ Add Another Author</p>	<p>Insert Special Characters</p> <p>Given/First Name* <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p>Family/Last Name* <input type="text"/></p> <p>Academic Degree(s) <input type="text"/></p> <p>Affiliation <input type="text"/></p> <p>E-mail Address* <input type="text"/></p> <p>ORCID* <input type="text"/> Fetch</p> <p>What is ORCID?</p> <p>Institution* <input type="text"/></p> <p><input type="checkbox"/> This is the corresponding author</p> <p><input type="checkbox"/> Deceased Status</p> <p><input type="checkbox"/> Equal Contribution Status</p> <p><input type="checkbox"/> Post-Publication Corresponding Author</p>

Set Other Author parameters: Alternative Statuses

Authors

You may reorder the authors by dragging and dropping an Author's summary line to the correct position in the Current Author List.

Current Author List

Test User [Corresponding]

+ Add Another Author

+ Add Another Author

Enter Author Details

Insert Special Characters

Given/First Name*

Middle Name

Family/Last Name*

Academic Degree(s)

Affiliation

E-mail Address*

ORCID [Fetch](#)

[What is ORCID?](#)

This is the corresponding author

Deceased Status

Equal Contribution Status

Post-Publication Corresponding Author

ater [Build PDF for Approval](#) →



Custom Details Pages

Displaying Author Information

Custom Details Pages: Displaying Author Information

- If an Editorial Office would like to be able to review the full author list on the details page – they can create a custom details page
- Three default layouts exist; these layouts represent the 'library':
 - Default Editorial
 - Default Proposals
 - Default Production
- To Create a new layout: Copy an existing layout – from there, edit to make changes to an already established layout

Custom Details Page: Displaying Author Information

- Publications can add a variety of information to the details pages - when it comes to author and co-author information the following options are available:
- **First Author** – display is just like 'Other Authors', with 'Mail To' functionality (the ability to send an email 'on-the-fly') and the KnowledgeFinder icon to search Author information in MEDLINE
- **Corresponding Author** (First, Middle and Last Name, Institute, City, State, and Country)
- **Corresponding Author E-Mail**
- **Other Authors** (List excluding Corresponding Author)
- **All Authors (List including Corresponding Author)** – same display and functionality as First Author, described above

Custom Details Page: Configuration

PolicyManager> General Policies>
Define Details Page Layouts: Copy an existing layout – and click Edit next to the new copy

1. Copy One of the default layouts
2. Click “Edit” on your new Copy
3. Click the link to “Select Items to Display” to see new items to add to your new details page
4. Select your desired items to display
5. Click Submit

TIP: Expand all at the top of the page

Information Submitted by Author

- Article Type
- Full Title
- Secondary Keywords
- Short Title
- Secondary Short Title
- First Author
- Corresponding Author (*First, Middle and Last Name, Institute, City, State, and Country*)
- Corresponding Author E-Mail
- Other Authors (*List excluding Corresponding Author*)
- All Authors (*List including Corresponding Author*)
- Corresponding Author Secondary Information
- Funding Information
- Abstract
- Secondary Abstract
- Section/Category

Contributing Author Information: Custom Details Page Configuration

Now you've returned to the "Add/Edit Details Page Layout for Copy of..." page

1. Add any new headings you'd like for your details page
2. Reorder the page so that it makes sense by renumbering the items and clicking Update Order
3. Click submit at the bottom of the page

Order	Default Description	Show link to this item
1	Author Information [Section Heading]	<input type="checkbox"/>
2	Corresponding Author (First, Middle and Last Name, Institute, City, State, and Country)	<input type="checkbox"/>
3	Corresponding Author E-Mail	<input type="checkbox"/>
4	Corresponding Author Secondary Information	<input type="checkbox"/>
5	Other Authors (List excluding Corresponding Author)	<input type="checkbox"/>
6	Invitation Notes to Author:	<input type="checkbox"/>
7	Author Questionnaire Summary (Responses for all Authors)	<input type="checkbox"/>
8	First Author	<input type="checkbox"/>

NB: Some selections display links on the Details page to the destination page – however “Show link to this item” will provide an anchor link at the top of the details page to drop down to the item on the page

Custom Details Page: Configuration

Then you'll need to set the details page for the role that needs the new information:

Role Manager > Editor Role > Edit Role > General Searching and Viewing:

General Searching and Viewing

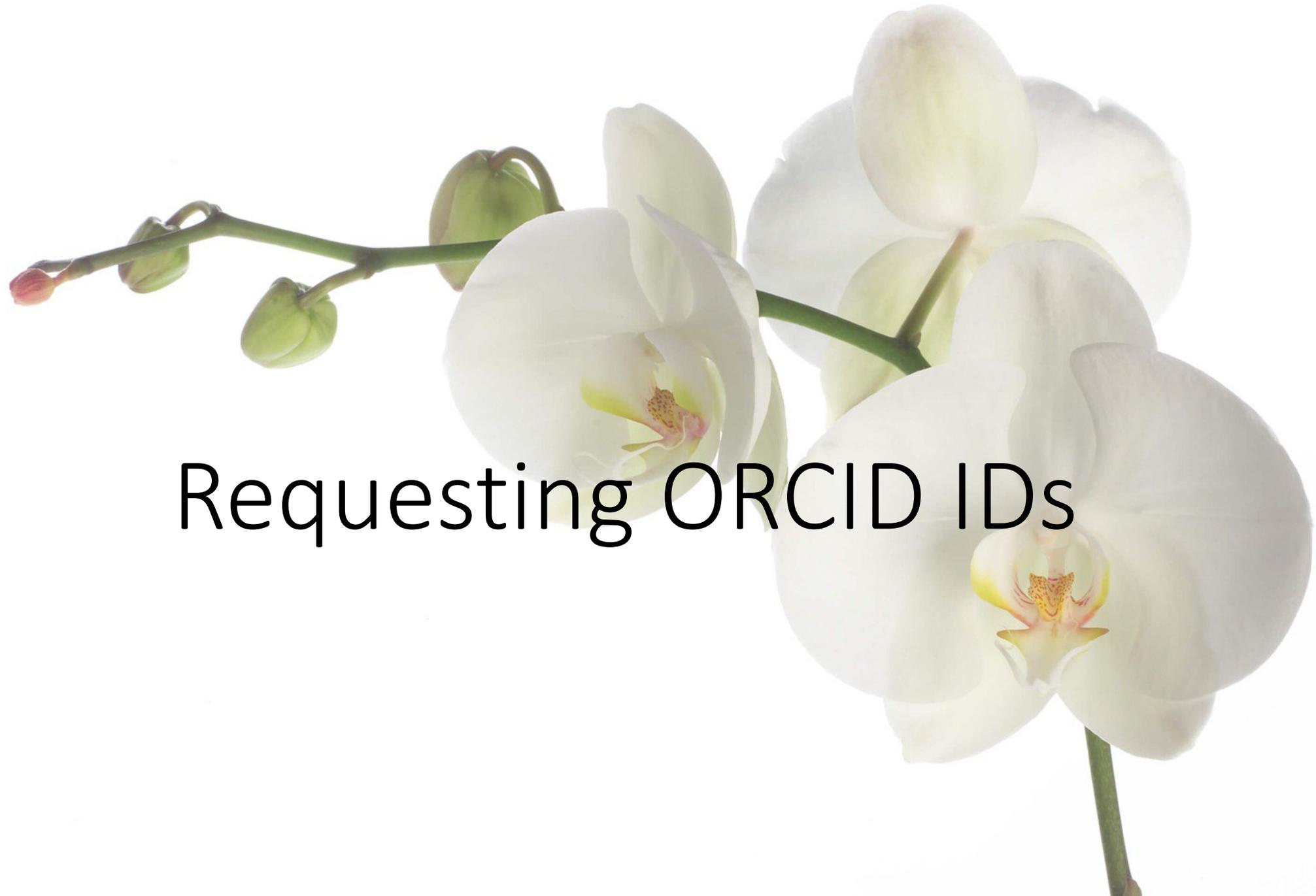
Use Editorial Details Layout FOR EEMUG 2018

- Search All Manuscripts
- Search Only Assigned Manuscripts
- Share Saved Searches
- View Linked Submission Groups
 - Create/Edit Linked Submission Groups
 - Set Active/Inactive Status on Linked Submission Groups
 - Enable Review Sharing for Linked Submission Groups
- Search Similar Articles in MEDLINE

That role – will then be able to see that page by selecting the Details page – from the Action List on any manuscript

Preprint DOI:	
Additional Manuscript Details:	Add/Edit Additional Manuscript Details
Corresponding Author:	<input checked="" type="checkbox"/> John Francis Gilmer <input type="checkbox"/> IRELAND [Proxy]
Corresponding Author E-Mail:	aoconnell@ariessys.com
Author Comments:	
Other Authors:	<input checked="" type="checkbox"/> James Bond <input checked="" type="checkbox"/> Pussy Galore <input checked="" type="checkbox"/> Beyonce Knowles Author Status
Author Questionnaire Summary:	View Author Questionnaire Summary
First Author:	<input checked="" type="checkbox"/> John Francis Gilmer, aoconnell@ariessys.com <input type="checkbox"/> [Proxy]
All Authors:	<input checked="" type="checkbox"/> John Francis Gilmer <input type="checkbox"/> [Proxy] <input checked="" type="checkbox"/> James Bond <input checked="" type="checkbox"/> Pussy Galore <input checked="" type="checkbox"/> Beyonce Knowles Author Status
Short Title:	
Article Type:	Original Study

Author Information



Requesting ORCID IDs

Authenticated ORCID iD request



- If you wish to collect ORCID iDs for co-Authors, we recommend that you use co-author verification. This ensures that the Co-Author ORCID iD is always provided by the co-Author using the secure Authentication protocol.
- **To Configure:** PolicyManager > 'Edit Article Types' > choose an Article Type- click 'Edit'
- Below the header 'Co-Author Parameters', find the 'Authenticated ORCID iD Request' drop down list and select 'Optional' or required as desired.
- **To Configure Custom Instructions:** Some publications may wish to offer customized instructions that will appear along with the ORCID Authentication section of the Co-Author Verification process.
- PolicyManager > Submission Policies > 'Edit Request Authenticated ORCID iD Instructions'
- Text may then be added to the 'Co-Author during Verification' field.

Requesting ORCID IDs

Author Parameters

Number of days Author has to Revise Submission:

First Revision

Subsequent Revisions

Set this value to zero if you do not want to use Revision Due Dates.

Authenticated ORCID iD Request:

Set this to Optional to ask the Corresponding Author to retrieve and/or authorize their ORCID iD when submitting a manuscript. Set to 'Required' to further prevent submission if they do not then retrieve their ORCID iD.

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

Co-Author Parameters

Register/Verify Other Authors

Authenticated ORCID iD Request:

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

Requesting ORCID IDs

- If the Article Type is configured to prompt ORCID iD Authentication, contributing Authors will be presented with a button to Link to their ORCID Profile after clicking the deep link from the co-Author verification letter
- If no ORCID iD has been provided, or a non-Authenticated ORCID iD has already been provided for the co-Author, a 'Link to ORCID Profile' button will be available, sending the co-Author to ORCID.org to Authenticate their iD
- If the 'Register and Verify' setting is enabled and the co-Author has already registered and has previously retrieved an Authenticated ORCID iD, then the ORCID iD will be displayed with an ORCID icon and the co-Author will be able to proceed with Authorship verification - able to see the status of their manuscript
- If you rather your corresponding authors complete ORCID IDs for their co-authors (not recommended) you may set this in Policy Manager > Submission Policies> "Other Author Parameters"

Requesting ORCID IDs

- **System Administration**> Policy Manager> Submission Policies> 'Set Other Author Parameters'
- This link opens the *Set Other Author Parameters* page (pictured)

Set Other Author Parameters

You may request additional information about Other Authors entered on the **Add/Edit/Remove Authors** manuscript submission step. Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'. If your Publication chooses to require Other Author verification or registration for any Article Type, you may want to select E-mail or other address fields as required for all Other Authors so that you will have a means of contacting Other Authors. ([more...](#))

Other Author Parameters		Include in Merge Field?
<small>— require unique e-mail addresses for all authors of a submission.</small>		
Set "ISNI" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "ORCID" Text Entry Box Preference:	Required	<input checked="" type="checkbox"/>
Set "PubMed Author ID" Text Entry Box Preference:	Hidden	<input type="checkbox"/>
Set "ResearcherID" Text Entry Box Preference:	Hidden	<input type="checkbox"/>

Enter Author Details

[Insert Special Characters](#)

Given/First Name*

Middle Name

Family/Last Name*

Academic Degree(s)

Affiliation

E-mail Address*

ORCID*

[What is ORCID?](#)

CRedit



CRedit

- CRedit Taxonomy for Authors is an open standard for defining the roles played in the work leading to a research output.
- The classification includes but is not limited to traditional authorship roles.
- Project CRedit (Contributor Roles Taxonomy) has created an initial taxonomy that classifies fourteen different 'Contributor Roles'.
- Each person contributing to a piece of research may be assigned multiple roles. For more information on Project CRedit, see: <http://casrai.org/CRedit>

Collecting Contributor Roles: Configuration

Policy Manager > Submission Policies > Configure Contributor Roles

On this page you'll define:

- The taxonomy you wish to use
- Whether you want authors to define the “degree” of their contribution
- Whether you want to allow authors to define roles not in the taxonomy
- Instructions you wish to provide

Configure Contributor Roles

Contributor Roles can be attributed to each Author of a submission. On this page, you may choose your version of the taxonomy, specify the metadata to be collected, and define the custom instructions to be displayed to users when attributing roles. Then on the *Set Other Author Parameters* page, you can specify whether to collect Contributor Roles for your publication (along with the other parameters for Authors). Then on the *Edit Article Type* page, you can specify whether Contributor Roles are Required or Optional for an Article Type.

For more information on Contributor Roles and Project CRediT, click here: <http://credit.casrai.org>

Set Taxonomy Version

Select a version of the CRediT Taxonomy's Contributor Roles from the dropdown menu.

Choose Taxonomy:

Select Additional Metadata to be Collected

The following options allow you to specify whether to collect a Degree of Contribution for each Contributor Role assigned to an Author, and whether to display a text box to allow the Corresponding Author to enter a name or description of a role that is not in the taxonomy.

Collect 'Degrees of Contribution'

Display 'Other' field for free-text entry of a role name

Edit Instructions

Enter any instructions that you would like to appear when a user clicks the 'Instructions' link while editing the Contributor Roles for an Author.

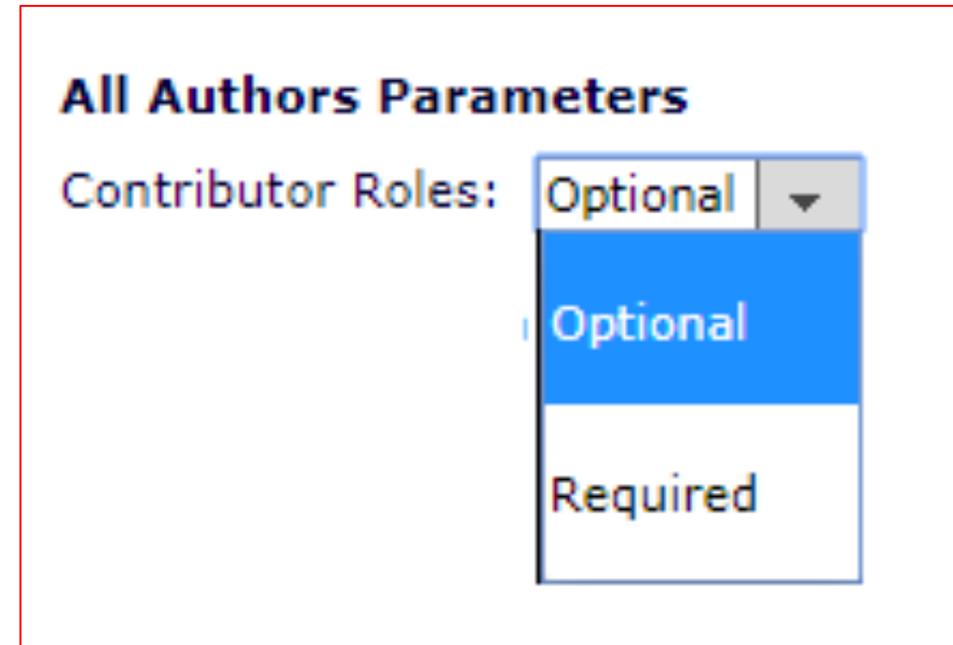
Area	Instructions

Collecting Contributor Roles: Configuration

Policy Manager > Submission Policies

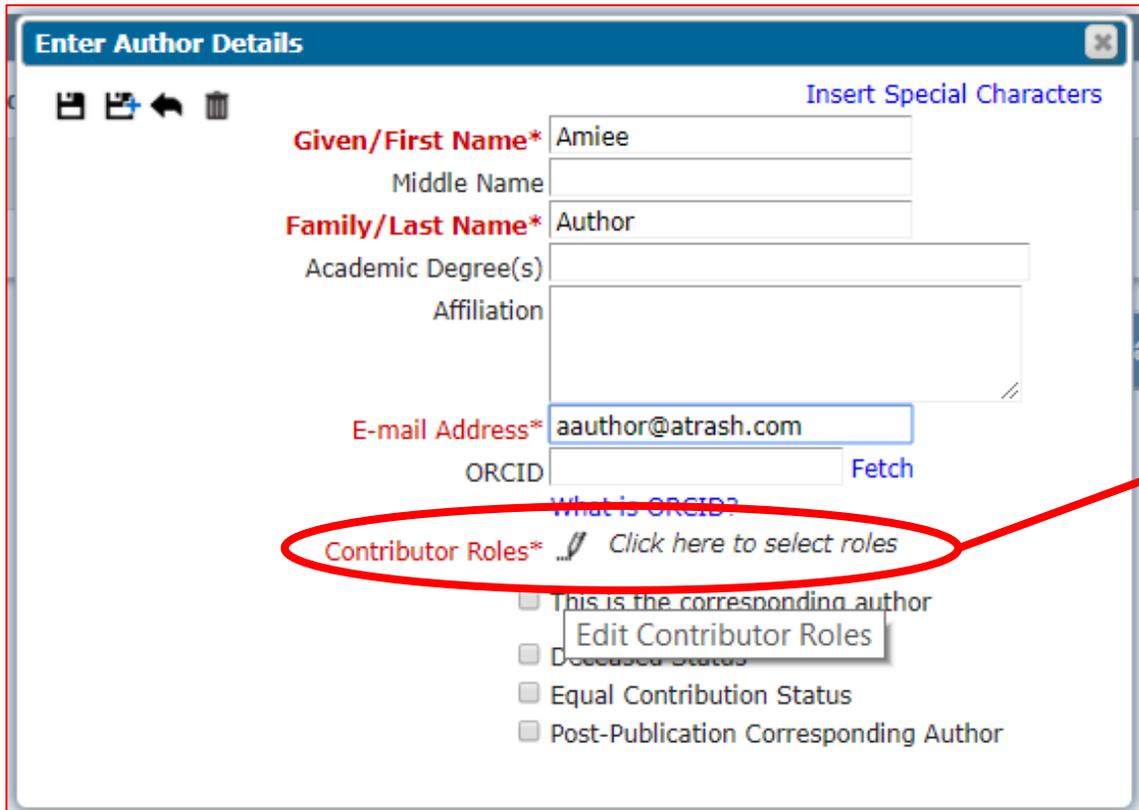
>Edit Article types > Edit

- Make sure “Set “Contributor Roles” Preference:” is set to **display** in “Other author parameters”
- Next you’ll define which article types should request Contributor role information
- And then whether this information is required or optional



Collecting Contributor Roles: Submission View

The information request is then is integrated into the **Add/Edit/Remove author** step of submission



Enter Author Details

Insert Special Characters

Given/First Name* Amiee

Middle Name

Family/Last Name* Author

Academic Degree(s)

Affiliation

E-mail Address* aauthor@atrash.com

ORCID Fetch

What is ORCID?

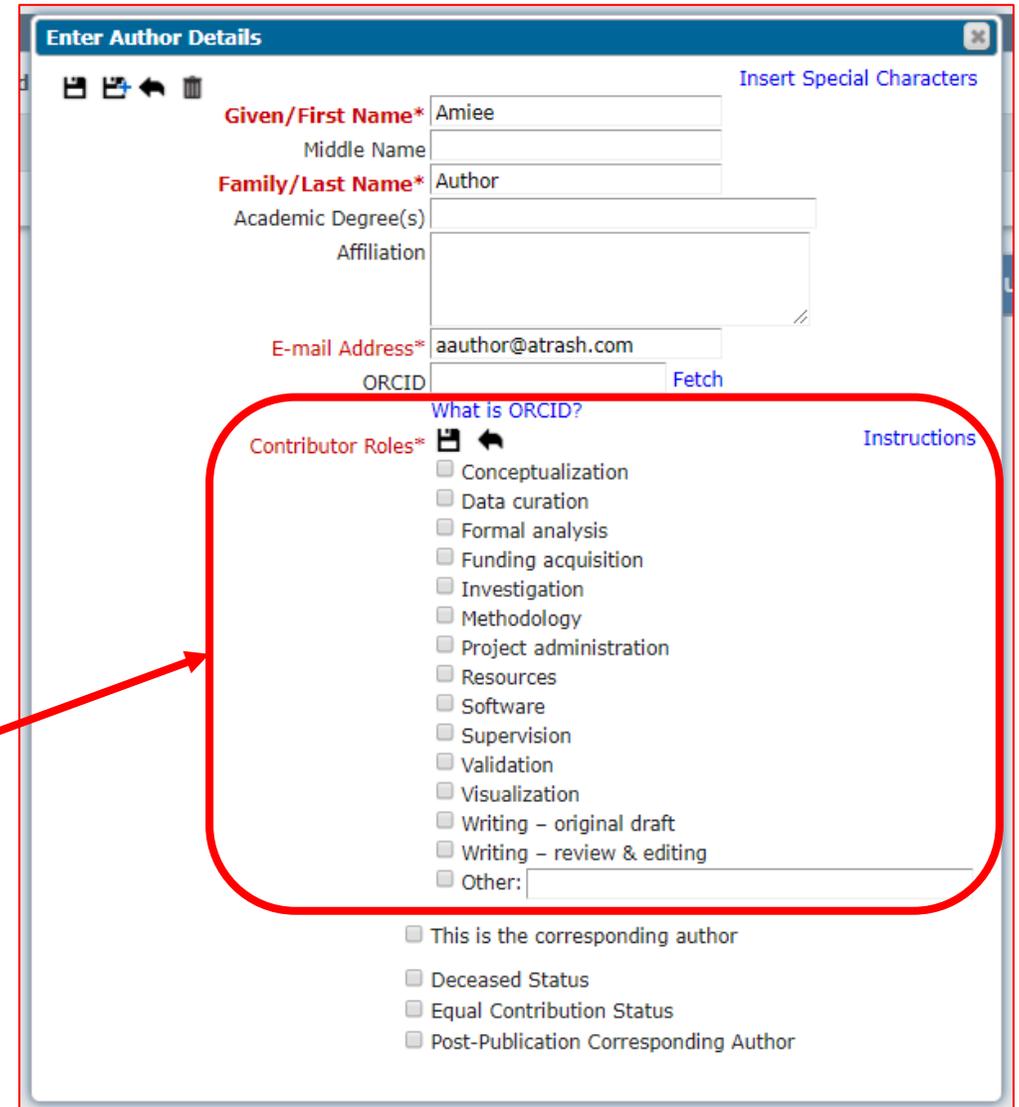
Contributor Roles* [Click here to select roles](#)

This is the corresponding author

Deceased Status

Equal Contribution Status

Post-Publication Corresponding Author



Enter Author Details

Insert Special Characters

Given/First Name* Amiee

Middle Name

Family/Last Name* Author

Academic Degree(s)

Affiliation

E-mail Address* aauthor@atrash.com

ORCID Fetch

What is ORCID?

Contributor Roles* [Instructions](#)

- Conceptualization
- Data curation
- Formal analysis
- Funding acquisition
- Investigation
- Methodology
- Project administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing – original draft
- Writing – review & editing
- Other:

This is the corresponding author

Deceased Status

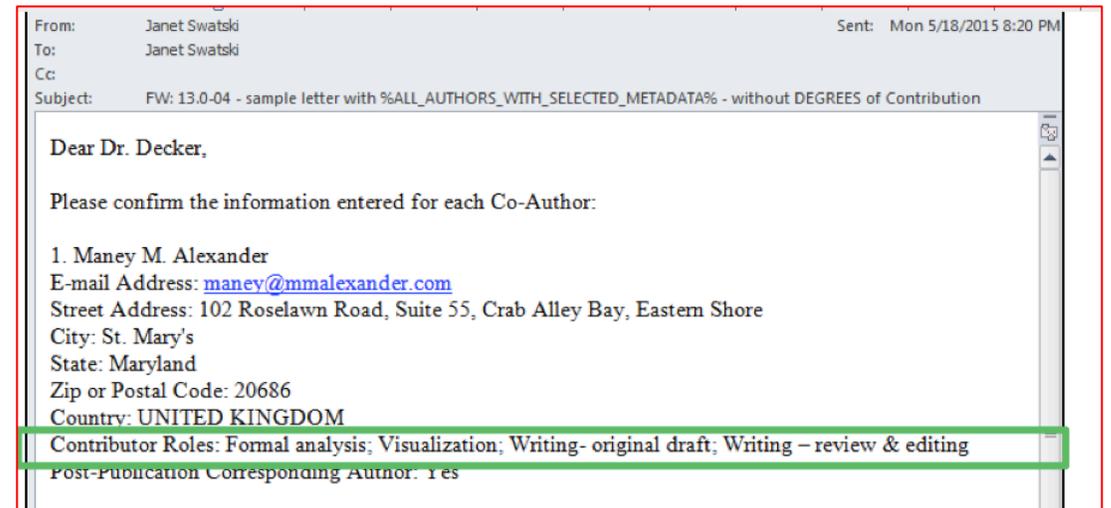
Equal Contribution Status

Post-Publication Corresponding Author

Collecting Contributor Role Information: Author verification

When a Co-Author is asked to verify their contribution to a submission, the Co-Author Verification email can include the set of Contributor Roles attributed to them by including the merge field-

%AUTHOR_CONTRIBUTOR_ROLES%



Contributor Role Information: Editorial Office View – Details - Author Status

Author Details for Manuscript Number: JANETDEV121-D-15-00013
Typhoon Lagoon on Mars

[Close](#)

Corresponding Author Status

Order	Author Name	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation
1	Maney M. Alexander	Conceptualization Funding acquisition Methodology Project administration Supervision	jswatski@ariessc.com		BS MS PhD MBA	St. Mary's College

Other Author Status

Order	Author Name	Contributor Roles	E-mail Address	Academic Degree(s)	Affiliation	Confirmed?
▲▼	▲▼				▲▼	▲▼
2	June Author	Formal analysis Software Writing - original draft	jswatski@ariessys.com	DDS		No Response
3	June Bug	Data curation Writing - revise & editing	jswatski@ariessys.com			No Response

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.

Author List Changes

Managing Authors information

Author List Changes

- Editors are alerted to changes made to the Author list between versions by an EM warning triangle indicator
- This is displayed in select Editor folders, the Details page and Technical Check page
- The Author Details page contains details as to the change



Author List Changes: Details Page view

Corresponding Author:	 Doctor Worm  UNITED STATES [Proxy]
Corresponding Author E-Mail:	[REDACTED]
Author Comments:	
Other Authors:	 Rabbit Man
Short Title:	Author Status 
Article Type:	Research Article
Section/Category:	
..	.

Author List Change: Author Status

Other Author Status

Order	Author Name	Added in Revision	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
2	James Bond	R0		jbond@ariessys.com Edit				No Response	Resend Letter View Author Details Questionnaire Not Completed
3	Halle Berry <i>New</i>	R1-John Francis Gilmer		Hberry@trash.com Edit				No Response	Resend Letter View Author Details Questionnaire Not Completed
4	Kelly Rowland <i>New</i>	R1-John Francis Gilmer		krowland@trash.com Edit				No Response	Resend Letter View Author Details Questionnaire Not Completed

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](#)

Removed Authors

Author Name	Removed in Revision	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?
Pussy Galore	R1-John Francis Gilmer		Thatswhatshesaid@ariessys.com				Confirmation Not Requested
Beyonce Knowles	R1-John Francis Gilmer		Bknowles@ariessys.com				Confirmation Not Requested

Author List Changes: Corresponding Author view

Revisions Being Processed for Author Doctor Worm

Page: 1 of 1 (2 total revisions being processed) Display 10 results per page.

Action	Manuscript Number	Title	Date Submission Began	Status Date	Current Status
View Submission Author Status Correspondence Send E-mail	ABBEY1713R1	testing	23 Nov 2017	23 Nov 2017	Revised Manuscript Submitted
View Submission Correspondence Send E-mail	ABBEY162R1	peanut butter jelly time	14 Sep 2016	01 Mar 2017	With Editor

Page: 1 of 1 (2 total revisions being processed) Display 10 results per page.

Other Author Status

Order	Author Name	Added in Revision	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
2	Rabbit Man <i>New</i>	R1	testme@trash.com Edit	0000-0002-7642-2598			No Response	Resend Letter

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](#)

Any Questions?

Michaela Barton

Account Coordinator

mbarton@ariessys.com