

People Record Management

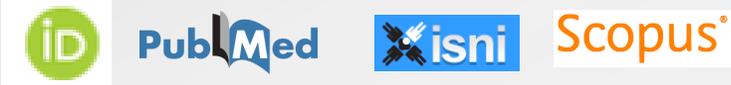
Dianne Gullo

Sr Account Coordinator

dgullo@ariessys.com



Agenda

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

COMING
SOON!

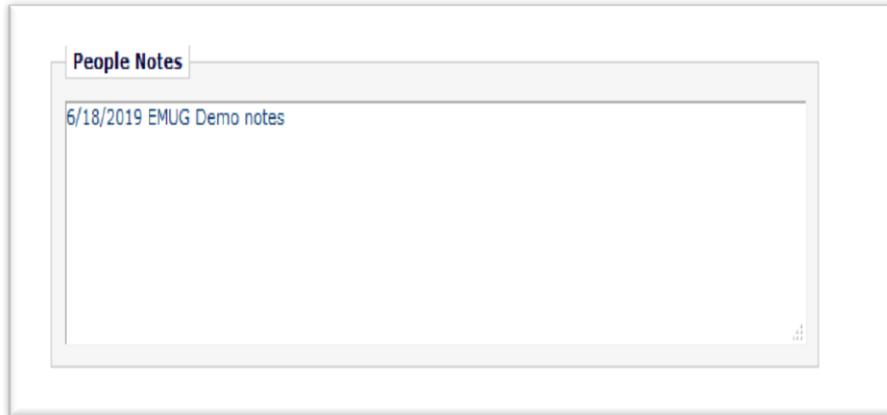


Detailed People Notes

Currently available in EM



Current People Notes vs. Detailed People Notes



Detailed People Notes - Highlights

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

Can be entered on Proxy Registration

Proxy Registration

Please enter key information about the person you are registering.

User Information [Open Special Character Palette](#)

Reviewer Role:

Default Login Role: Reviewer

Personal Information

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

First Name *:

Middle Name:

Last Name *:

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

E-mail Address *:

If entering more than one e-mail address, use a semi-colon between each address (e.g., joe@thejournal.com;joe@yahoo.com)
Entering a second e-mail address from a different e-mail provider decreases the chance that SPAM filters will trap e-mails sent to you from online systems. [Read More.](#)

Country *:

Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Filter By:

Publication	Operator	Notes	Date	Action
▲▼	▲▼		▲▼	

No Detailed People Notes are available

Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Filter By:

Publication	Operator	Notes	Date	Action
▲▼	▲▼		▲▼	

No Detailed People Notes are available

Displayed on Search People – Update Information page

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

Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

Mickey Mouse

Proxy-Registered:
Apr 27, 2017
(Data Unconfirmed by User)

Last Modified:
Dec 07, 2018

Viewed Privacy Policies:
(has not viewed them yet)

[Inactivate this User](#)

[Send Login Details](#)

**The user will be sent an email with

Detailed People Notes [Open Special Character Palette](#)

Add New Note:

Character Count: 0 / 4000

[Submit Note](#)

Filter by:

[View/Print All](#)

Publication	Author	Note	Date	Action
UKACTEST2	Melanie Cotterell	Cute smile	Dec 07, 2018	
UKACTEST2	Melanie Cotterell	Really good hearing!	Dec 07, 2018	
UKACTEST1	Melanie Cotterell	A great little dude	Dec 07, 2018	

Display this section at the top of this page

Displayed on Search People – Update Information page

- This example is Editor with permission to View only

Detailed People Notes

[View/Print All](#)

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

Display this section at the top of this page

People Notes

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

View/Print All Detailed People Notes

Detailed People Notes

Add New Note: i

Character Count: 0 / 4000

Filter By: All Publications

Publicat	DEM0122	DEM0141	Note	Date	Action
DEM0122	Mary François Smith, PhD		Proin tincidunt, eros at luctus maximus, ex ante dignissim diam, sit amet bibendum (more...)	Nov 11 2015 10:43:59:147AM	
DEM0122	Mary François Smith, PhD		Etiam sit amet urna est. Sed et lectus est. Pellentesque ac neque bibendum neque (more...)	Nov 11 2015 10:43:46:760AM	
DEM0122	Mary François Smith, PhD		Maecenas magna elit, suscipit quis mi at, varius dapibus urna. Etiam volutpat (more...)	Nov 11 2015 10:43:38:430AM	
DEM0122	Mary François Smith, PhD		Nullam libero lorem, aliquet a urna et, porta semper magna. Morbi sollicitudin, (more...)	Nov 11 2015 10:43:20:197AM	

Display this section at the top of this page

Detailed People Notes
Luciano Vincenzo Lipari, None

Publication	Operator	Note	Date
DEM0122	Mary François Smith, PhD	Proin tincidunt, eros at luctus maximus, ex ante dignissim diam, sit amet bibendum neque dui vitae nunc. Nulla eleifend consequat tincidunt. Sed porta finibus erat, ac ultrices metus vestibulum a. Suspendisse rutrum massa sit amet ligula maximus, eu sollicitudin elit suscipit. Nulla ultricies vulputate auctor. Donec odio tortor, aliquet nec nunc quis, blandit commodo tortor. Sed faucibus ornare nisi, sed euismod lectus. Donec fringilla metus venenatis augue placerat viverra. In sit amet arcu a lacus auctor pellentesque sed vitae velit.	Nov 11 2015 10:43:59:147AM
DEM0122	Mary François Smith, PhD	Nullam libero lorem, aliquet a urna et, porta semper magna. Morbi sollicitudin, dolor et convallis egestas, turpis dui iaculis ligula, mattis vulputate velit ex quis erat. Nulla facilisi. Aliquam venenatis, lorem in posuere fringilla, massa dui facilisis leo, id consequat urna lectus eu quam. Morbi faucibus mi leo, non hendrerit odio eleifend interdum. Phasellus auctor placerat elementum. Donec vitae urna eu diam consectetur efficitur. Mauris a laoreet velit. Proin sit amet scelerisque lorem, consectetur imperdiet libero. Donec eu diam nulla. Pellentesque rhoncus convallis est, ac vehicula diam consectetur sed. Aliquam accumsan elit odio. Sed a leo pharetra, posuere libero et, laoreet eros. Ut eleifend, eros quis dapibus fringilla, risus risus egestas eros, et sollicitudin massa dui quis mauris.	Nov 11 2015 10:43:46:760AM
DEM0122	Mary François Smith, PhD	Etiam sit amet urna est. Sed et lectus est. Pellentesque ac neque bibendum neque efficitur vulputate eget id dolor. Fusce mattis porta felis, at tincidunt nulla lacinia eget. Etiam eu enim libero. Fusce congue metus sit amet viverra vehicula. Vestibulum dolor dui, sagittis nec feugiat et, gravida vitae sapien. Morbi mattis metus quis elementum suscipit. Aenean a lectus in erat pharetra convallis eu at libero. Etiam volutpat turpis justo, quis porttitor felis elementum vitae. Quisque porttitor pharetra metus eu accumsan. Mauris sed nisl vitae odio auctor porttitor. Sed sed nibh pharetra, egestas leo eget, consectetur felis. Proin id placerat nisl. Pellentesque sit amet egestas ex.	Nov 11 2015 10:43:46:760AM

Displayed on People Information Page

People Information - John E Ross

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

General Information [Open Special Character Palette](#)

Permanent Address: <small>(Current Address)</small>	UNITED STATES iswatski@ariessc.com
Secondary Information:	
People URLs:	None
Unavailable Dates:	None
Role:	Author, Reviewer

Detailed People Notes

Add New Note: 

Character Count: 0 / 4000

Filter By:

Publication ▲▼	Operator ▲▼	Note	Date ▲▼	Action
JERS	Twink E. Jonesey, PhD	Ginger has changed institutions.	Sep 1 2014 03:07PM	
ASC	Mary Jones, PhD	He is up for election to at least 2 more boards.	Aug 18 2014 12:07PM	
JERS	Twink E. Jonesey, PhD	Ginger is on about 6 boards that I know of.	Aug 17 2014 03:06PM	
ASC	Mary Jones, PhD	Do you have any idea how busy Ginger is currently? I had heard that he was going (more...)	Aug 16 2014 03:06PM	
ASC	Mary Jones, PhD	He's had a rough year, what with the other one disappearing for a few (more...)	Aug 19 2014 03:07PM	
JERS	Twink E.	What do you think about making Ginger our prime contact for our new	Aug 18 2014	

Searchable – Reviewer Search

Search for Reviewer All Reviewers - Manuscript Number LONDEV151-D-18-00011
Franklin D. Roosevelt
Turn-taking in Human Communication--Origins and Implications for Language Processing.

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

Change Search Type

Search My Publication Search for Reviewers from All Reviewers

Search for Reviewers

[Help with Searching](#)

[Insert Special Character](#)

(Criterion	Is/Is not	Selector	Value)	
<input type="checkbox"/>	Last Name	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Last Name	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	First Name	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	E-mail Address	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Position	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Department	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Institution	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	City	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	State	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Country	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	People Notes	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Detailed People Notes	is	Begins With		OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	People Flag Name					
<input type="checkbox"/>	Personal Classifications					
<input type="checkbox"/>	Personal Keywords					
<input type="checkbox"/>	Secondary Last Name					
<input type="checkbox"/>	Secondary First Name					

Displayed in Reviewer Search Results

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

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

Select As				Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics	
Inv.	Asn.	Alt.	Prop.							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mickey Mouse (Reviewer)	No		Reviews in Progress: 0	Date Last Invited: Dec 07, 2018		
							Completed Reviews: 0	Portal Wide: -		
							Un-assigned After Agreeing: 0	Outstanding Invitations: 1		
							Terminated After Agreeing: 0	Agreed: 0		
							Last Review Agreed: -	Declined: 0		
							Portal Wide: -	Un-invited Before Agreeing: 0		
							Last Review Completed: -	Terminated: 0		
							Portal Wide: -	Total Invitations: 1		
							Last Review Declined: -			
							Portal Wide: -			
							Avg Days Outstanding: 0			
							Manuscript Rating: 0			
							Avg Review Rating: 0.0			

[Detailed People Notes](#)

Filter By: All Publications View/Print A...

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

(* indicates match between Reviewer and Manuscript Classifications)

Searchable – Search People and Search for Authors

Search People

Choose the criterion for selecting People Records.

[Help with Searching](#) [Insert Special Character](#) [Register New User](#)

Criterion	Selector	Value	User Role
Last Name	Begins With		ALL
Last Name	Begins With		END
First Name	Begins With		END
Institution	Begins With		
City	Begins With		
State			
Country			
E-mail Address			
Phone Number			
Personal Classifications			
Personal Keywords			
People Notes			
Detailed People Notes			
People Flag Name			
Registration Date			
Proxy Registration			

[Editor Main Menu](#)

Search for Authors - Manuscript UKACTEST1-D-18-00004
"Ice tea isn't a real thing and coffee always smells better than it tastes."

[Manuscript Details](#) [Register and Invite New Author](#)

[Help with Searching](#) [Insert Special Character](#)

(Criterion	Is/Is not	Selector	Value)		
<input type="checkbox"/>	Last Name	is	Begins With			OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	First Name	is	Begins With			OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	Position						
<input type="checkbox"/>	Department						
<input type="checkbox"/>	Institution	is	Begins With			OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	City						
<input type="checkbox"/>	State						
<input type="checkbox"/>	Country	is	Begins With			OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	E-mail Address						
<input type="checkbox"/>	People Notes						
<input type="checkbox"/>	Detailed People Notes	is	Begins With			OR	<input type="button" value="Remove"/>
<input type="checkbox"/>	People Flag Name						
<input type="checkbox"/>	Last Name	is	Begins With				<input type="button" value="Remove"/>

Configuration - Editor RoleManager Permissions

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

Reviewer Search Criterion:

- People Notes
- Detailed People Notes
- Personal Classifications
- Personal Keywords

Viewing and Editing People Data

- Search People
 - Send Username and Password
 - Change ORCID ID
 - Change E-mail Address
 - Change Preferred Method of Contact
 - Change Editor Role Designation to/from :
 - ALL EDITOR ROLES
 - Managing Editor
 - Editor In Chief
 - Associate's "Editor"
 - Guest Editor
- Inactivate Users
- Anonymize Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
 - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs

Configuration - Share Notes Across Journals

Share People

- [Define People Sharing Group](#)
- [Define Reviewer Sharing Partners](#)
- [Set Inactivation and Merging Policies](#)
- [View Duplicate E-mail Policies](#)
- [Set Detailed People Notes Sharing Policy](#)
- [Configure Group Notifications](#)

Journals within the same publishing organization can establish cooperative relationships with other journals for the purposes of establishing a single login across all journals in the group. This configuration is performed on the [Sharing Group](#) page.

Once the sharing relationship(s) is confirmed, journals then have the option to share Detailed People Notes with other journals in the group. This configuration is performed on the [Define Reviewer Sharing Partners](#) page. Reviewer Data sharing, even if a confirmed people sharing relationship exists, is not affected by this configuration.

Journals in the group must then agree on a policy for making use of people records made inactive/merged on all the other journals in the group, or vice versa. This configuration is performed on the [Set Inactivation and Merging Policies](#) page.

Journals in the group should agree on a policy for allowing duplicate e-mail addresses to be used, as such changes normally propagate throughout the group. This configuration is performed on the [View Duplicate E-mail Policies](#) page.

Each journal in the group may choose to share Detailed People Notes with other journals in the group. As a result, a subset of journals in the group can share Detailed People Notes, based on what they have selected. This is configured on the [Set Detailed People Notes Sharing Policy](#) page.

The final configuration step for journal groups is to set up notification preferences for inactive or merged. For journals who decide not to propagate use of people records to other journals in the group, this configuration is performed in [ActionManager](#). For journals who decide to propagate use of people records to all journals in the group, this configuration is performed on the [Configure Group Notifications](#) page.

[AdminManager Menu](#)

Set Detailed People Notes Sharing Policy

To share Detailed People Notes with other journals that have also selected to share Detailed People Notes, click the checkbox for 'Share Detailed People Notes with other journals'. You may select this option at any time. Your journal will synchronize your Detailed People Notes with all the other journals that are sharing notes.

You may deselect this option at any time to stop sharing Detailed People Notes. If you do, your journal will retain all the previously shared Detailed People Notes, but will not share any further changes to Detailed People Notes with other journals from that point on. If you do not wish to retain the notes shared from other journals, you may manually remove them from each user's personal record.

Share Detailed People Notes with other journals

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

- [Define People Sharing Group](#)
- [Define Reviewer Sharing Partners](#)
- [Set Inactivation and Merging Policies](#)
- [View Duplicate E-mail Policies](#)
- [Configure Group Notifications](#)
- [AdminManager Menu](#)

People Flags



People Flags

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

- View People Flags
- Turn On People Flags
- Turn Off People Flags

- [Create Customized Submission Flags](#)
- [Create Customized People Flags](#)

Domino S Cotterell

(ESTONIA)

Ice tea isn't a real thing and coffee always smells better than it tastes.

Loves tea

Search People

Choose the criterion for selecting People Records.

[Help with Searching](#) [Register New User](#)

Criterion	Selector		User Role
People Flag Name	Is Equal To	Preferred Reviewer Always has co-authors Never answers phone Never missed a deadline Can always be bribed with a free book Loves tea	ALL
Last Name	Begins With		END

Creating Customized People Flags

- Policy Manager
 - General Policies
 - Create customized people flags

Create Customized People Flags

People Flags can be attached to people records on the People Flags page (accessible from the 'People Information' and 'Search People - Update Information' page), or by clicking on the flag icon on any page where a People Flag is displayed. Users with permission to 'Turn On People Flags' can also set flags by clicking the 'Set Flag' icon . When a flag is displayed for a person, it is visible to Editors and Publishers with appropriate RoleManager permission.

Order	Flag	Flag Name		
<input type="text" value="1"/>		Great Reviewer	Remove	Edit

[Add](#)

[Update Item Order](#)

[Add](#)

[Back to PolicyManager](#)

Add Customized People Flag

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

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On People Flags' and 'Turn Off People Flags' can display/turn off People Flags for any person on the People Flags page. When a flag is attached to a people record, it will be displayed next to the person's name on many pages throughout the system (Editor and Publisher Roles must have permission to 'View People Flags').

Flag Icon: 

Flag Name: [Open Special Character Palette](#)
Maximum 256 characters

Associated with Custom Question? No



Adding Flags to People Records

<input type="checkbox"/>	Dianne Author <small>KF</small>			ANGUILLA	[Author]
<input type="checkbox"/>	Bob Becker <small>KF</small>			UNITED STATES	[Author]
<input type="checkbox"/>	bob becker <small>KF</small>			UNITED STATES	[Author]

A red box highlights the person icons in the second and third rows, with a "Set Flags" button overlaid on the middle row.

SET PEOPLE FLAGS

Display	Flag	Flag Name
<input type="checkbox"/>		Great Reviewer
<input checked="" type="checkbox"/>		EMUG

Cancel Submit

<input type="checkbox"/>	Dianne Author <small>KF</small>			ANGUILLA	[Author]
<input type="checkbox"/>	Bob Becker <small>KF</small>			UNITED STATES	[Author]
<input type="checkbox"/>	bob becker <small>KF</small>			UNITED STATES	[Author]

A red arrow points to the hash icon in the first row of the table.

Other Identifiers

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



People URL's

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

View People URLs

Edit People URLs

People URLs

<https://melanieonlinkedin.com>

<https://melanieontwitter.com>

<https://melanienotonfacebook.com>

Note: You must enter the complete URL
(i.e. http://www.target_site.com)

Privacy Policy Acknowledgement

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

Software Copyright © 2018 Aries Systems Corporation.
[Aries Privacy Policy](#) | [Publisher's Data Use Privacy Policy](#)

* I have read and accept the [Publisher's Data Use Privacy Policy](#) and the [Aries Privacy Policy](#).

Melanie Cotterell   

Proxy-Registered:
May 15, 2018
(Data Verified by User)

Last Modified:
Oct 04, 2018

Viewed Privacy Policies:
Aug 03, 2018
IP Address: 10.100.31.21

• **HELP** •

ORCID & Other Personal ID's

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



ISNI	<input type="text"/>	
ORCID	0000-0001-8555-7964 	Delete
PubMed Author ID	<input type="text"/>	
ResearcherID	<input type="text"/>	
Scopus Author ID	<input type="text"/>	

ORCID & Other Personal ID's

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

- [Edit Registration Fields](#)
- [Edit Registration Instructions](#)
- [Create Registration Questions](#)
- [Configure Proxy Registration](#)
- [Configure Login Page](#)
- [Set Classifications and Keywords Deep Link Expiration](#)
- [Enable Role Switching](#)
- [Configure Expedited Reviewer Login](#)

Required	Hidden	System Field
<input type="checkbox"/>	<input type="checkbox"/>	ISNI
<input type="checkbox"/>	<input type="checkbox"/>	ORCID
		<input type="checkbox"/> Require users to Authenticate with ORCID
		<input type="checkbox"/> Ask users to Register via ORCID by default
<input type="checkbox"/>	<input type="checkbox"/>	PubMed Author ID
<input type="checkbox"/>	<input type="checkbox"/>	ResearcherID
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Scopus Author ID

ORCID - Authentication & Login

- ORCID – further integration
 - Authentication
 - SSO Login

- [Edit Registration Fields](#)
- [Edit Registration Instructions](#)
- [Create Registration Questions](#)
- [Configure Proxy Registration](#)
- [Configure Login Page](#)
- [Set Classifications and Keywords Deep Link Expiration](#)
- [Enable Role Switching](#)
- [Configure Expedited Reviewer Login](#)

<input type="checkbox"/>	<input type="checkbox"/>	ISNI
<input type="checkbox"/>	<input type="checkbox"/>	ORCID
	<input type="checkbox"/>	Require users to Authenticate with ORCID
	<input type="checkbox"/>	Ask users to Register via ORCID by default
<input type="checkbox"/>	<input type="checkbox"/>	PubMed Author ID
<input type="checkbox"/>	<input type="checkbox"/>	ResearcherID
<input type="checkbox"/>	<input type="checkbox"/>	Scopus Author ID

Please select any alternative, third party Login options you also wish to enable.

 Login via ORCID

ORCID – Co-Authors, Submission and Permission

- ORCID – further integration
 - Requirement for Submission
 - Collect for Co-Authors
- Role Manager Permission for Change/Removal/Edit:

Authenticated ORCID id Request:

Co-Author Parameters

Register/Verify Other Authors

Co-Authors register and verify on new submission ▾

Set "ISNI" Text Entry Box Preference:

Set "ORCID" Text Entry Box Preference:

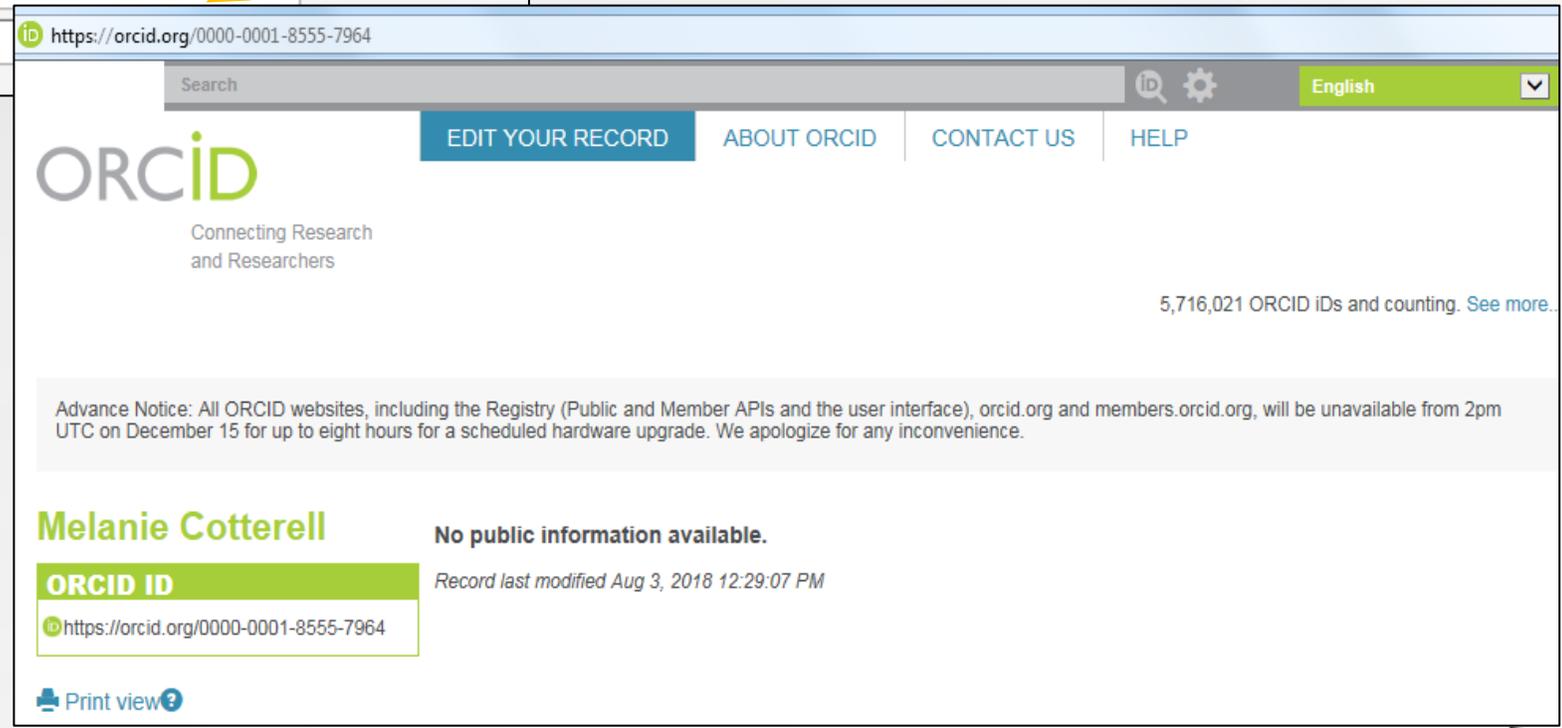
Set "PubMed Author ID" Text Entry Box Preference:

Set "ResearcherID" Text Entry Box Preference:

Set "Scopus Author ID" Text Entry Box Preference:

ORCID – Authenticated ORCID Direct link

ISNI	<input type="text"/>
ORCID	0000-0001-8555-7964  Delete
PubMed Author ID	<input type="text"/>
ResearcherID	<input type="text"/>
Scopus Author ID	<input type="text"/>



id <https://orcid.org/0000-0001-8555-7964>

Search   English 

ORCID
Connecting Research and Researchers

[EDIT YOUR RECORD](#) [ABOUT ORCID](#) [CONTACT US](#) [HELP](#)

5,716,021 ORCID iDs and counting. [See more..](#)

Advance Notice: All ORCID websites, including the Registry (Public and Member APIs and the user interface), orcid.org and members.orcid.org, will be unavailable from 2pm UTC on December 15 for up to eight hours for a scheduled hardware upgrade. We apologize for any inconvenience.

Melanie Cotterell **No public information available.**

ORCID ID *Record last modified Aug 3, 2018 12:29:07 PM*

 <https://orcid.org/0000-0001-8555-7964>

 [Print view?](#)

Extend Additional People Details (APD's) Functionality

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

• *Coming in 16.0 and Subject to Change!*



Current Functionality: Registration Questions

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

Confirm Registration

Please confirm the following very important information:

Given/First Name: **Jake**
Family/Last Name: **Meyer**
Username: **jake**
E-mail Address: **jake@ariessys.com**
Country or Region: **UNITED STATES**

Please tick the box below if you would like to receive special offers and promotions that may be of interest to you:

I would like to receive special offers and promotions.

Please click on the privacy policy links below and then check the box. This ensures that you are aware of your personal data privacy protection under the European Union's General Data Protection Regulation (GDPR). See https://ec.europa.eu/info/law/law-topic/data-protection_en

* I have read and accept the [Publisher's Data Use Privacy Policy](#) and the [Aries Privacy Policy](#).

If the information is correct and you wish to complete this registration, click the 'Continue' button below.

<< Previous Page Continue >>

Current Functionality: APDs

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

Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

Ms. Stacey J Lavelle [User Icons]

Self-Registered:
Oct 02 2003 01:53PM

Last Modified:
Apr 10 2018 10:40AM

Viewed Privacy Policies:
Mar 23 2018 11:26AM
IP Address: 127.0.0.1

[Inactivate this User](#)

[Send Login Details](#)

**The user will be sent an email with a link to reset their password. The

User Information

[Open Special Character Palette](#)

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Default Login Menu:

Available as a Reviewer? Yes No

Board Member? Yes No

Forbidden as a Reviewer? Yes No

Reviewer Role *:

Publisher Role *:

Editorial Role *:

Editor Description:

[Activity Details](#)

[Additional People Details](#)

Personal Information

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

Given/First Name *:

Middle Name *:

Family/Last Name *:

Additional People Details - Stacey J Lavelle, MD

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

Hobbies	<input type="text" value="Running"/>
Birth Date	<input type="text" value="06/13/1990"/> × <input type="text" value=""/> (mm/dd/yyyy)
Reviewer Stats from Legacy System	
<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	

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

NEW: Use APDs as Registration Questions!

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

Confirm Registration

Please confirm the following very important information:

Given/First Name: **Molly**
Family/Last Name: **Carrol**
Username: **molly2**
E-mail Address: **molly@mailinator.com**
Country or Region: **IRELAND**

This publication emphatically requests that all users check the box to confirm that they like cats.

* Please confirm that you like cats.

This publication requires all users to confirm that they are not logging in on Saturday. Please check the box to proceed with your task at hand.

* Today is absolutely, positively not Saturday.

Please click on the privacy policy links below and then check the box. This ensures that you are aware of your personal data privacy protection under the European Union's General Data Protection Regulation (GDPR). See www.eugdpr.org

* I have read and accept the [Publisher's Data User Privacy Policy](#) and the [Aries Privacy Policy](#).

Has freckles?	No freckles	
Please order a refreshing beverage:	A chilled glass of Sauvignon Blanc	
What is the value of Pi (π)?	<input type="text"/>	Select a refreshing beverage from the drop-down list.
Please select a random date:	<input type="text"/>	 (mm/dd/yyyy) 

If the information is correct and you wish to complete this registration, click the 'Continue' button below.

[<< Previous Page](#) [Continue >>](#)

Three required Registration Questions configured using existing functionality

Four optional APD fields configured to appear on the Confirm Registration page, showing Help text configured for two of the APDs, shown on this page as tooltip hover text.

Displayed on Search People – Update Information

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

[Open Special Character Palette](#)

Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

Weledelgeboren Heer Fokke Naaktgeboren-Niemandsverdriet van Zuidewijn ▾

Proxy-Registered:
Oct 17, 2017
(Data Verified by User)

Last Modified:
May 03, 2018

Viewed Privacy Policies:
May 03, 2018
IP Address: 10.100.31.2

[Inactivate this User](#)

[Send Login Details](#)

**The user will be sent an email with a link to reset their password. The password will not reset until the user clicks that link.

Exclude this user from receiving

User Information

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Default Login Menu:

Available as a Reviewer? Yes No

Board Member? Yes No

Forbidden as a Reviewer? Yes No

Reviewer Role *:

Publisher Role *:

Editorial Role *:

Editor Description:

Has freckles?	<input type="text" value="A little cinnamon on the nose"/>	i
Likes cats?	<input type="text" value="Crazy cat lady"/>	i
Age range?	<input type="text" value="Please select age range"/>	
Please order a refreshing beverage:	<input type="text" value="Please select a beverage"/>	
What is the value of Pi (π)?	<input type="text"/>	i

[Activity Details](#)

[Additional People Details](#)

Also Displayed on Update My Information Page

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

Select Personal Classifications

Personal Keywords (None Defined)

Edit Personal Keywords

Additional Information

Unavailable Dates

indicates affirmative response

<input checked="" type="checkbox"/>	Please confirm that you like cats.
<input checked="" type="checkbox"/>	I have read and accept the Publisher's Data User Privacy Policy and the Aries Privacy Policy .

Please order a refreshing beverage:	Please select a beverage <input type="text"/>	i
What is the value of Pi (π)?	<input type="text"/>	
Please select a random date:	04/03/2018 <input type="text"/> (mm/dd/yyyy) i	

Cancel Submit

Extended Configuration Options for APDs

Edit Additional People Detail Field

Cancel Submit

Field Description: [Insert Special Character](#)
 Likes cats?
 Maximum 256 characters

Field Type: List [View/Edit Values for Drop-down List](#)

Display this field to all Editor roles

Hide this field from: Managing Editor, Editor-in-Chief, Editor, Associate Editor

Options
 Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional People Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link or icon is displayed on the appropriate page.

Page	Hide	Editable	Required	Help Text
Additional People Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
Search People - Additional Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
People Activity Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

The settings below affect the pages related to a user's own people record. Additional People Detail Fields can be configured for Optional or Required responses at registration (as with Registration Questions) or be Hidden. 'Enforced at Login' requires users to enter a response the first time they log in after the field was added. Responses to Additional People Detail Fields on the Update My Information page may be configured as Hidden, Editable, or Not Editable. These settings affect only the people record owner's view. Editors cannot ever see Additional People Details on another user's Update My Information page in proxy mode.

Page	Options	Help Text
Confirm Registration	Hidden, Hidden, Optional, Required, Enforced at Login	
Update My Information	Hidden, Hidden, Editable, Not Editable	

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

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

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

