

# SCHOLARONE MANUSCRIPTS™

## ORCID ID GUIDE

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## ORCID OVERVIEW

**ORCID, Inc.**, which stands for **Open Researcher and Contributor ID**, is an interdisciplinary, non-profit organization dedicated to solving the name ambiguity problem in scholarly research by creating a central registry of unique identifiers for individual researchers. This service allows researchers to create a permanent, unique ORCID record which may be linked to contact information, institutional affiliations, publication records and other identifiers.

*ScholarOne Manuscripts* interacts with ORCID giving Authors the ability to validate their ORCID iD and to grant journals the ability to read limited data from their ORCID profile. ORCID iDs displayed across the product include icons denoting whether the ORCID iD has been validated by its owner.

## ASSOCIATING ORCID IDS

### USER ACCOUNT CREATION

During account creation, new users will be given the option to associate an ORCID iD with their account by either registering for a new ORCID iD or associating an existing ORCID iD. Each of these options will be presented to the user as links in the first step of the account creation process. In prior versions, new users entered their ORCID as text in the third step of account creation and it was not validated by ORCID.

**Create an Account** There are three screens to fill out in the Create Account process. In this first screen, enter your name and e-mail information into the boxes below. Required fields are marked with "req." When you are finished, click "Next."

1 E-Mail / Name

2 Address

3 User ID & Password

**ORCID®**

Select the appropriate option below to associate an ORCID iD to your account.

To register for a new ORCID iD, click [here](#).

To associate this account with your existing ORCID iD, click [here](#).

**Open Researcher and Contributor ID (ORCID)** is a non-profit organization dedicated to solving the long-standing name ambiguity problem in scholarly communication by creating a central registry of unique identifiers for individual researchers and an open, transparent linking mechanism between ORCID and other current author identifier schemes. To learn more about ORCID, please visit <http://orcid.org/content/initiative>.

**Name** Special Characters

req.  Dr.  Miss  Mr.  Mrs.  Ms.

When the user selects one of the options to associate an ORCID iD with their account, a new browser window will open a registration page on the ORCID website.



**ORCID**

**ScholarOne Manuscripts**

**ABOUT:** ScholarOne, a Thomson Reuters company, provides online tools to help many of the world's leading scholarly publishers manage their submission and peer review processes.

has asked for the following access to your ORCID Record

- Confirm who you are, and share your ORCID iD.
- Add an external identifier to your ORCID Record
- Read limited info from your biography

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

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

First name  \*

Last name

Email  \*

Re-enter email  \*

Password  \*

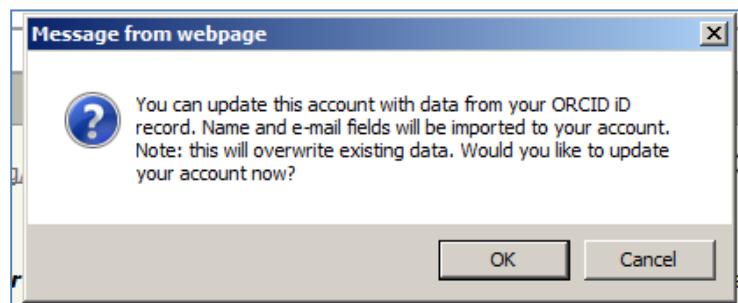
Confirm password  \*

Default privacy for new research activities (Works, Affiliations, Funding, etc)

The user must sign in using their existing ORCID credentials or register for a new ORCID iD. Once the user has validated an ORCID iD using one of these options, they will be asked to authorize *ScholarOne Manuscripts'* access to their ORCID record.

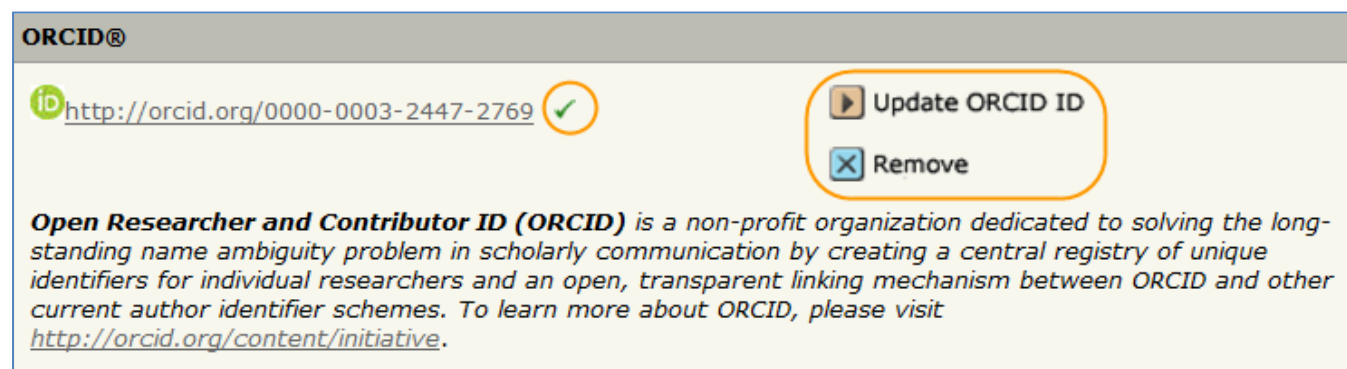
If the user clicks **Authorize**, they will be redirected back to their journal's *ScholarOne Manuscripts* site with a validated ORCID iD.

As part of the redirect process they will have an opportunity to update their account registration form with data from their ORCID profile.



Click **OK** to update the journal's *ScholarOne Manuscripts* site. Click **Cancel** to return to *ScholarOne Manuscripts* without updating the data.

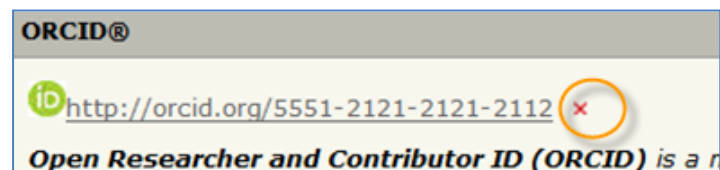
Once the user's ORCID iD is successfully validated, it will appear in the ORCID section of the account creation page followed by a **green** check mark. This check denotes that the ORCID iD was validated by ORCID.



The ORCID iD is accompanied by an **Update ORCID iD** button allowing the user to associate a different ORCID iD to their account by repeating the same process on the ORCID site, and a **Remove** button allowing the user to delete the associated ORCID iD from their account.

## VALIDATING AN EXISTING ORCID ID

In certain cases, a user will have an ORCID iD associated with their account which has not yet been validated and a red X will appear after the id number. These cases include ORCID iDs added to the account by another user, such as during co-author account creation. ORCID iDs in the system that have not been validated will be followed by a red X, letting the user know they need to validate, and others know that the record has not been confirmed by ORCID.



This system for denoting validated vs. non-validated ORCID iDs will appear throughout the *ScholarOne Manuscripts* site for added transparency.

Users with non-validated ORCID iDs can complete the validation process by going to the **Edit My Account** link and clicking on the **Update ORCID iD** icon.

## VIEWING ORCID IDS THROUGHOUT THE SYSTEM

In addition, ORCID iDs have been added to several important workflow steps. They will now appear for authors and co-authors on the Manuscript Details tab under **Author-Supplied Data** in the Authors and Institution section.

<b>Author-Supplied Data</b>	
Manuscript Type:	Original Article
Title:	ZZ
Manuscript ID:	WRK1-1483
Submitting Author:	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Ma, Hequn</span> <input checked="" type="checkbox"/> Save  <span>Ma, Hequn (proxy)</span> </div> <ul style="list-style-type: none"> <li>• <i>primary affiliation</i></li> <li>United States</li> </ul>
Authors & Institutions:	<ul style="list-style-type: none"> <li> <span>Ma, Hequn proxy</span> <ul style="list-style-type: none"> <li>• United States</li> </ul> </li> <li> <span>http://orcid.org/1111-1111-1111-111X</span> </li> <li> <span>Conley, Stacy Lee proxy</span> <ul style="list-style-type: none"> <li>• United States</li> </ul> </li> <li> <span>http://orcid.org/0000-0003-4927-809X</span> </li> </ul>

Links to users' ORCID records will also appear in several new places on the **Invite Reviews** tab allowing editors and administrative staff to quickly bring up the ORCID record for a potential or current reviewer. These links will appear in the Reviewer List, the Author's Preferred/ Non-Preferred Reviewer list and with all reviewer search results.

Reviewer List				
Order	Name	Status	History	Remove
General Reviewer				
1	Admin, Milan proxy  id <a href="http://orcid.org/0000-0002-3080-3205">http://orcid.org/0000-0002-3080-3205</a> ✓	<input checked="" type="checkbox"/> Invite	Selected: 03-Sep-2013 <a href="#">view full history</a>	<input type="checkbox"/>

As mentioned above, all ORCID iDs displayed on the site will appear with either a green check mark or a red X to denote validation status.

## AUTHOR SUBMISSION

During the submission process, the submitting author will have the ability to add ORCID iD to Co-Authors accounts. If they know the co-author's ORCID iD, they can enter it into the space provided, or they can use the **Find an ORCID iD** link.

2 Attributes

3 **Authors & Institutions**

4 Reviewers & Editors

5 Details & Comments

6 File Upload

7 Review & Submit

My Co-Authors			
Order	Name	Institution, Department	E-Mail
1	Ms. Gwen MacLachlan <i>Corresponding Author</i>	Fred Street Fruita, CO, USA 80315	gwen@test.demo

**Add a New Co-Author**

req E-Mail:  Find  req Sal.  req First (Given) Name:  Middle Name:

Title:

Institution:  Department:

req Address 1:  Address 2:  Address 3:  Rm/Suite:

req Country:

State/Province:  req City:

req Zip / Postal Code:  Phone Number:

id <http://orcid.org/>

[Find an ORCID iD](#)

ResearcherID:

Clicking **Find an ORCID iD** will open up a window to the ORCID site so the Author can search for an ORCID iD.

The search results will include the person's ORCID iD number which may be copied and pasted in the Co-Author's information.

### Advanced Search

You must populate a least one field.

Search by ORCID iD

Given name

Also search other names

Family name

Institution name

Also search Past Institutions

Keyword

---

**Search results**

Relevance	ORCID ID	Given name	Family names	Other names	Institutions
13.145	0000-0002-8478-823		MacLachlan		

## ORCID EMAIL TAG FOR EMAIL TEMPLATES

The email tag **##PERSON\_ORCID\_UPDATE##** can be added to emails allowing the journal admin to easily request that users update their ORCID iD.

If the email recipient does not have an ORCID iD linked to their account or the iD is not yet validated, the new **##PERSON\_ORCID\_UPDATE##** tag will create the following message: **“To create a new ORCID record or to link your user account to an existing ORCID ID, simply click this link.”**

**Edit E-Mail (WRK1-2013-0010)**

**From:** greg.mowery@1234never.123send.com

**To:** rob.simms@123never.123send.com

**CC:**

**BCC:**

**Subject:** RE: Manuscript WRK1-2013-0010

**Body:** to:rob.simms@123never.123send.com  
from:greg.mowery@1234never.123send.com  
cc: Workflow 1 [EIC](#) Contact

To create a new [ORCID](#) record or to link your user account to an existing [ORCID](#) ID, simply click this link:  
[http://mc04.manuscriptcentral.com/prod4-red?URL\\_MASK=e4e4147eb6bc42f48aed7a9c02ff8720](http://mc04.manuscriptcentral.com/prod4-red?URL_MASK=e4e4147eb6bc42f48aed7a9c02ff8720)

The user will be provided with a deep link which will send them to their ScholarOne site. Once they have logged in, they are taken directly to the ORCID entry screen on the **Edit My Account** page.

**Create an Account** There are three screens to fill out in the Create Account process. In this first screen, enter your name and e-mail information into the boxes below. Required fields are marked with "req." When you are finished, click "Next."

1 E-Mail / Name  Next

2 Address

3 User ID & Password

**ORCID®**

Select the appropriate option below to associate an ORCID iD to your account.

To register for a new ORCID iD, click [here](#).

To associate this account with your existing ORCID iD, click [here](#).

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**Name** Special Characters

req.  Dr.  Miss  Mr.  Mrs.  Ms.

Name:

**Note:** This tag is dynamic based on the validation status of a user’s ORCID iD. If the email recipient already has a validated iD linked to their account this email tag will not create the message, appearing blank to the user. This allows the **##PERSON\_ORCID\_UPDATE##** tag to be added to multiple types of correspondence without causing confusion among users who have already validated.


## ADMIN MERGE ACCOUNTS

There is a warning message to alert Journal Admins before merging accounts with an ORCID iD. During an account merge, the ORCID iD and validation status on the primary account will survive the merge in all cases.

123@123.com	4:08 AM EDT	- Author
	Modified: 30-Aug-2013	- Reviewer

You are requesting to merge two or more accounts with validated ORCID IDs. ORCID IDs on secondary accounts will be deleted. Are you sure you want to merge the requested accounts?

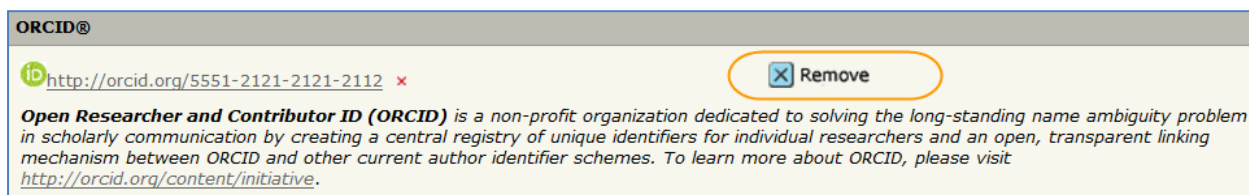
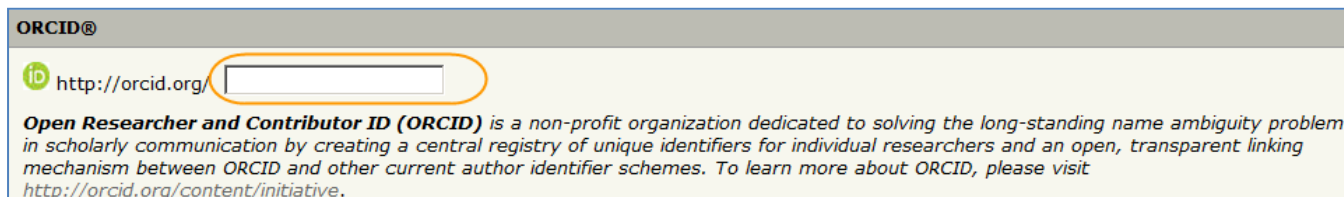
OK Cancel

 <a href="http://orcid.org">http://orcid.org</a>	Schmidt, Steve (Administrator)
---	--------------------------------



## ADMIN EDIT ACCOUNT

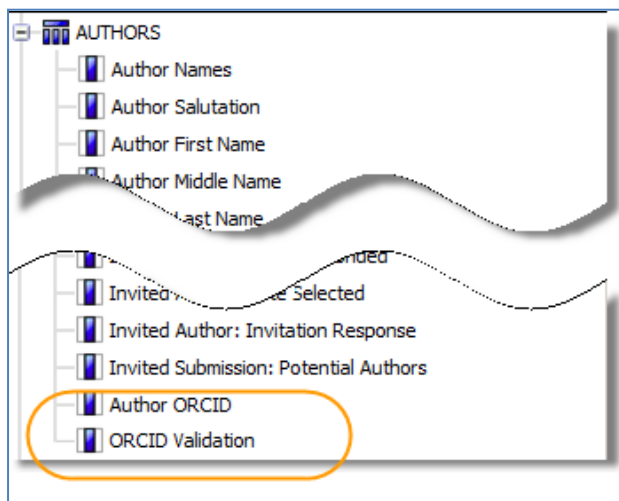
Journal Admins will have the ability to add ORCID iDs to existing user accounts, as well as remove the ORCID iD if needed.



## REPORTING

### COGNOS REPORTS

The **ORCID** field, which pulls a user's ORCID iD, is accompanied by an additional **ORCID Validation** field in each ad hoc reporting package. The new validation field will show a Yes or No answer in Cognos reports for each ORCID iD displayed giving immediate access to its validation status.



### SCHOLARONE MANUSCRIPTS DTD

An ORCID validation field is included in the ScholarOne DTD allowing journals to export information on ORCID validation status to production systems, giving publishers the option to exclude non-validated ORCID iDs from publications.

## SCHOLARONE®

ScholarOne, a Thomson Reuters Business, provides comprehensive workflow management systems for scholarly journals, books, and conferences. Its web-based applications enable publishers to manage the submission, peer review, production, and publication processes more efficiently, increasing their profile among authors, decreasing time-to-market for critical scientific data, and lowering infrastructure costs. ScholarOne offers workflow solutions for the submission and review of manuscripts, abstracts, proceedings, books, grants & awards, and production. Supporting over 365 societies and publishers, over 3,400 books and journals, and 13 million users, ScholarOne is the industry leader.

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