

ScholarOne Manuscripts Release Notes

Release v4.24







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Chris heads Product Management for Clarivate Analytics' ScholarOne platforms. Previous projects include Reviewer Locator, Publisherlevel Reporting and ORCID integration.



Greg KloiberSr. User Experience Designer, ScholarOne

Greg has redesigned major sections of both the ScholarOne Manuscripts and Abstracts platforms. Most recently, he revamped the Review Center for ScholarOne Manuscripts.



Sven MolterProduct Manager, ScholarOne

Sven has 12 years' experience in the industry and has been with ScholarOne since 2009. He started as a Client Implementation Manager where he worked with clients using the ScholarOne Abstracts Platform. Prior to working with ScholarOne he worked as the Senior Manager of Meetings, Membership and Education (Society of Behavioural Medicine) at Executive Director Incorporated where he oversaw the Annual Meeting planning process.



The following features are planned for release in ScholarOne Manuscripts v4.24. This document provides information about the default configuration values for each of the features. If you have any questions, please contact Chris Heid at 434.964.4040.

This release includes enhancements or changes that will immediately impact all ScholarOne Manuscripts users upon release. Please communicate to your users before the release to prepare them for any changes that might affect them. Other features must be activated by an administrator or ScholarOne representative for your users to benefit from the new functionality.

Release Summary

The default configuration settings and values for each of the features in the release are outlined below. If you wish to change any of the defaults, please <u>contact ScholarOne</u> and submit a case.

Feature	Summary
ORCID Log In	Users will be able to log into journals that have configured this ability, using their ORCID credentials.
	Action Required: Journals and publishers who do not already have their own ORCID Member credentials will need to work with ORCID to acquire them. Users will only need to link their ORCID account to ScholarOne once, as part of the log in process.
Other ORCID Improvements	To continue the growth of ORCID usage within the system, we will
	 Capture the ORCID iD of Reviewers on the review form. After it is associated, it will display everywhere the Review form is displayed and will be associated with the Reviewer's account when they are logged into the ScholarOne site. Keep ORCID iDs validated when a publisher acquires a journal from another publisher Remove all non-validated ORCID iDs No longer allow users to validate an ORCID iD when it already exists on a journal or shared portal
	Action Required: Journals and publishers who do not already have their own ORCID Member credentials will need to work with ORCID to acquire them.
<u>Transfer Enhancements</u>	The v4.24 release will include a number of manuscript transfer related enhancements
	 The ability to send authors multiple transfer options from which they can choose. The option to add custom questions to the Decision form Configurable reminders to transferring authors

Action Required: Configuration updates required.

CRediT Taxonomy Integration

With the 4.24 release, ScholarOne will integrate with the CASRAI CRediT taxonomy.

- The ability to collect author contribution during submission
- The flexibility to only collect during specific workflows such as revisions
- Supporting XML export functional in the ScholarOne DTD

Action Required: Configuration updates required.

Conversation Tool Updates

The free conversation tool has been updated with the following:

- Numerous usability enhancements:
 - General UI improvements
 - Tab label changes
 - Added ability to download the conversation as a PDF
 - o Moderation ability: Hide inappropriate comments
 - o Improved load time when selecting participants
- New configurable automated email reminders to request participation
- New Admin queue for unread posts
- Cognos reporting
- DTD export

Action Required: None

Document-Based Tags in Proof

Utilizing a new RTF upload option, Journals may include document-based tags on the second page of the manuscript proof.

- Allows journals to include responses to custom questions directly on the proof.
- Configurable by the journal, allowing text as well as tag responses to display on the 2nd page of the proof.

Action Required: Configuration updates required.

GDPR Admin Removal

Admins will have the ability to remove accounts under Administrative Options on the Account Information tab of the Person Details pop up.

Action Required: None

Broadcast Email Search Change

Beginning with v4.24 Broadcast Email Search Results will no longer include users who have opted out of marketing communications.

Action Required: None

<u>Publons Credit for Completed</u> <u>Reviews</u>

With the 4.24 release ScholarOne will introduce the ability for Reviewers to receive credit for previously completed reviews.

Action Required: None, if Publons is configured for your site. If not, please contact your Relationship Manager for more information.

Ringgold Connection Alert

ScholarOne will implement a Ringgold Connection Alert

- Allowing users to easily identify which institutions are yet to connect to Ringgold.
- Will increase the number of institutions connected to Ringgold over time.

Action Required: None

Update to Conflict Alerts in Advanced Reviewer Search

ScholarOne will update the logic used to flag reviewer search results as potential conflicts of interest.

Action Required: None

Publons Reviewer Connect

The v4.24 release will integrate Publons Reviewer Connect directly into the ScholarOne peer review workflow. This innovative new tool will allow editors to easily find, screen and connect with expert peer reviewers.

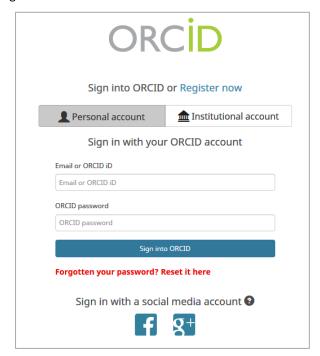
ORCID Log In

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.

In release 4.24, we will allow users to log in to participating ScholarOne sites using their ORCID credentials. First, the user will click on the *Log In with ORCID ID* button on the participating ScholarOne site:

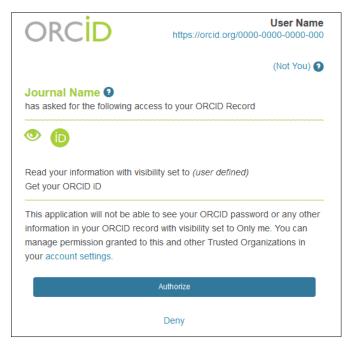


They will then log in to ORCID or register an ORCID account.

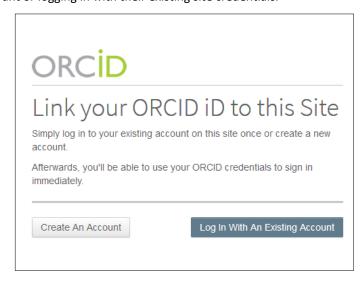


If the user has used this login process before or has already linked their ORCID iD to their ScholarOne profile, they will automatically be logged in to the ScholarOne site.

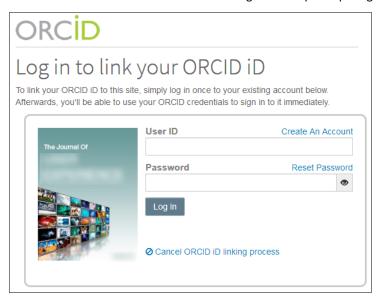
If this is their first time linking the ORCID and ScholarOne accounts together, they will be asked to authorize the publisher or journal to get their ORCID iD and to read limited-access information such as their name and address. Reading limited-access information will make it easier for new users that do not have a ScholarOne account to pre-fill their profile information when creating an account.



Next, they will need to link their ORCID account to the ScholarOne site. An intercept page will be displayed giving them the option of creating a new account or logging in with their existing site credentials.



If they already have an account on the ScholarOne site, they will only need to provide their ScholarOne login credentials once. Afterwards, they can use *either* the ScholarOne or ORCID credentials to log in to the participating site.



Action Required: Journals and publishers who do not already have their own ORCID Member credentials will need to work with ORCID to acquire them.

Other ORCID Improvements

In addition to adding the ability to sign in with an ORCID account, we've made other improvements with regards to gathering and retaining ORCID iDs.

Capture ORCID iD within a review

The Review Form (aka "Score Sheet") may now be configured to ask for the Reviewer's ORCID iD. It may be set to required or optional for the Reviewer to answer. If the Reviewer is logged in, it will associate the ORCID iD to the Reviewer's account. If they are not logged in, it will only be displayed where the review form appears on the site.

Without an ORCID iD, the question will appear like this:



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



Create an ORCID iD Associate your existing ORCID iD After associating the ORCID iD, the question will display the associated ORCID iD:

* Open Researcher and Contributor ID (ORCID)

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

The ORCID iD associated with your account is:

(b) 0000-0000-1234-5678

Retain ORCID iD validation after a journal is acquired

When a publisher acquires a journal from another publisher, the ORCID iDs on the user accounts will:

- Not be removed
- Stay validated in xml exports
- Have all of the journal's ORCID tokens and scopes removed

Removal of non-validated ORCID iDs

Many releases ago, a user could type in an ORCID iD manually and without validating on the ORCID site. While this is no longer the case, a very small percentage (<1%) of non-validated ORCID iDs are still within the system. We will be removing them as part of this release.

Note: Non-validated ORCID iDs have a red "X" beside them.

Reducing duplicate ORCID iDs

As part of the ORCID clean-up, we will no longer allow users to validate an ORCID iD that already exists on another account in the site.

Transfer Enhancement

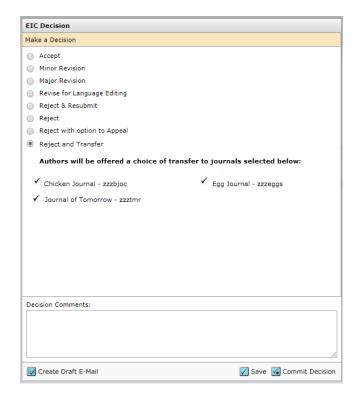
The ability to transfer submitted manuscripts between journals on ScholarOne is a valuable feature which publishers are using more and more frequently to make sure each journal reviews and publishes articles well-aligned with their scope. The v4.24 release will include several enhanced functionalities for journals using transfer including an option to offer authors multiple transfer choices.

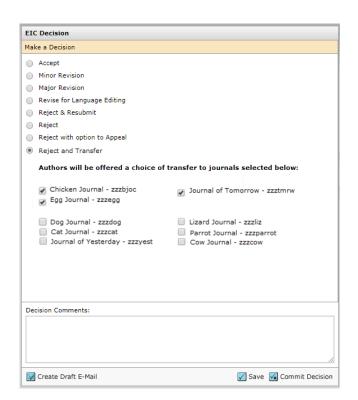
Transfer Choice for Authors

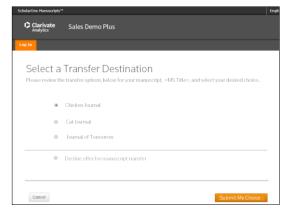
Prior to v4.24 journals offering an article transfer to an author needed to narrow down the author's transfer options to a single journal even if the paper could reasonably find a home at multiple portfolio titles. This unnecessarily limited an author's transfer choices and made it more difficult for publishers to successfully transfer articles. With the v4.24 release, journals will

have the configurable option to offer author multiple transfer choices allowing the author to choose the best home for their work.

If a journal has configured the 'Transfer Choice for Authors' functionality on their 'reject and transfer decision' the choices to be made available for the author will appear on the decision task once the transfer option has been selected. These journal options for the author can be static (all transferred papers receive the same set of choices) or editable (the decision maker can customize the papers offered before sending the decision. This functionality was designed to provide both authors and journals maximum flexibility and choice.

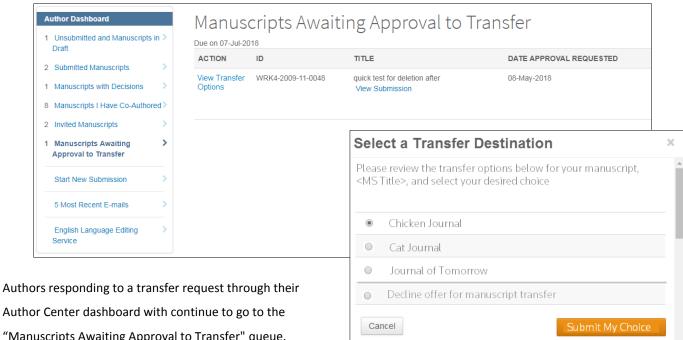






Similar to the current transfer functionality in ScholarOne, authors receiving an option to transfer may respond via the deep link email tag or in their Author Center. If responding via the email tag, the Author will be linked to an interstitial page on ScholarOne.

Without having to log-in, the Author will be shown their transfer options along with a final option to decline transfer of their paper. Just as with the current transfer functionality, a refusal of the transfer will result in a final reject of the manuscript on the site to which it was originally submitted.



Author Center dashboard with continue to go to the "Manuscripts Awaiting Approval to Transfer" queue.

Manuscripts in this queue with only one journal choice for

the author will continue to be displayed with 'Approve' and 'Reject' links in the Action column. However, manuscripts leveraging the Transfer Choice functionality will be displayed with a single link, 'View Transfer Options'.

Clicking this link will bring up a modal where the author is able to select their desired transfer destination from all offered titles or decline transfer of their manuscript.

'Submission of Transferred Manuscript' Reminder

To help make the transfer process more efficient and timely, ScholarOne is including a new, configurable option for email reminders in the v4.24 release. The 'Submission of Transferred Manuscript' event will allow the receiving journal of a transferred manuscript to send one or more email notifications to the author reminding them to complete the submission of the transferred article currently in draft. Multiple reminders may be configured and sent, each at a specified number of days after the transferred article was received. Timing of the email notifications is specified via the 'Reminder Days' column and

Submitted Workflow Tasks	Active	Reminder Days	Modify	Delete
(Task: AE Decision) Major Revision - add template				
Your Revision is due in 1 week	•	-1		×
(Task: AE Decision) Minor Revision - add template				
(Task: AE Decision) Reject & Resubmit - add template				
Submission of Transferred Manuscript - add template				
Reminder Submission of Transfered Manuscript	•	1		×
Reminder Submission of Transfered Manuscript 3		3		×
Reminder Submission of Transfered Manuscript 5		5		×
Copy all of the e-mail templates configured for this workflow to the	Tasks	nitted Workflo Workflow Tas		Save

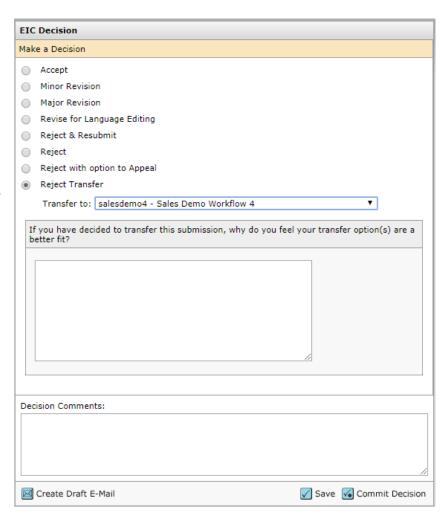
the value entered must be a positive integer representing the number of days after receipt of the manuscript you would like the notification sent out. Notification emails are sent based on when the author received the transferred draft in their Author Center. If your journal is configured to send transferred papers to a journal admin first, the timing of notifications will be based on when the admin sent the paper on to the author. Once the transferred manuscript is submitted, any remaining notifications will be cancelled.

Custom Questions on Decision Tasks

The ScholarOne Manuscripts 4.24 will also give journals the ability to configure custom questions on decision tasks. Previously, custom questions could be configured on checklists and recommendation tasks but not decisions. Such functionality will allow editors to provide valuable information on their decision making process. For example, a journal might ask, "What makes the transfer choices you have given the author a good fit for this paper?"

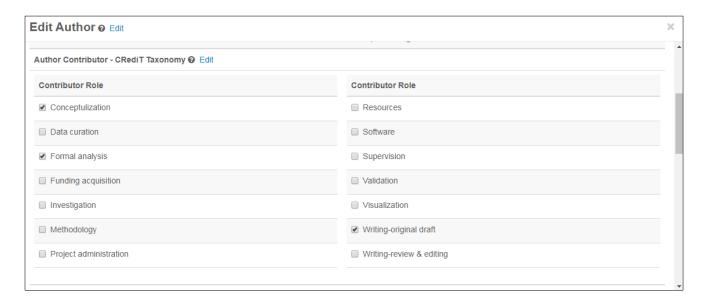
Custom question on a decision task appear directly below the decision options.

Configuration of these questions is found on each task within Task configuration section.



CRediT Integration

With the ScholarOne Manuscripts v4.24 release, we will integrate article submission with CASRAI's CRediT taxonomy, allowing



submitting authors to easily recognize the contributions made by each listed author. CASRAI's widely-adopted taxonomy is comprised of 14, high-level roles. "The roles are not intended to define what constitutes authorship, but instead to capture all the work that allows scholarly publications to be produced." - CASRAI

Collecting Author Contribution During Submission

If the CRediT functionality is configured for your ScholarOne site, a new section will appear on the 'Create New Author' and 'Edit Author' modals which appear during the submission process. This new section is titled 'Author Contribution – Credit Taxonomy' and will appear directly below the E-Mail field. To better accommodate this additional data, we have expanded the width of these modals.

In this section, each of the 14 CRediT author contributions will be listed with a check box allowing the submitting author to select those contribution appropriate for each co-author. If you wish to provide the submitting author with details or guidance, the header for this section contains a contextual instruction which will contain default text but may be customized to meet your needs.

Degree of Contribution

The CRediT taxonomy specifies 'Degree of Contribution' as an optional second element. The degree element provides additional context to a given role and will likely, but not necessarily, be used when two or more authors share a role. For example, if three authors shared responsibility for developing the research methodology but one held a leading role, all three authors would be associated with the 'Methodology' contribution role but additionally their degree of contribution could be specified as either 'Lead', 'Equal', or 'Supporting'. A journal may choose to collect author contribution information without the 'degree of contribution' option.

The contributions selected for each author will be displayed in the Selected Authors section of the submission form... and on the Manuscript Details page.

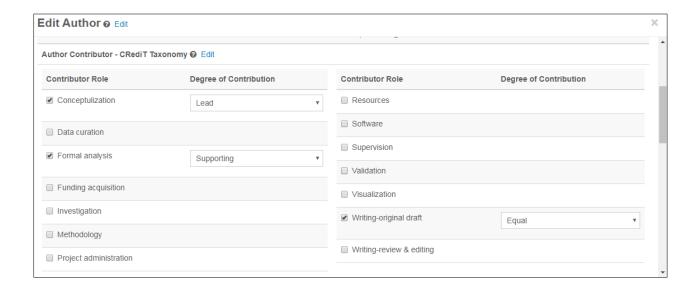




Workflow Configuration Options

ScholarOne has developed the CRediT integration to fit easily within your existing workflows. Collection of author contributions can be done on an optional or required basis. If required, all authors must have at least one contribution associated with their author record before the paper may be submitted.

Furthermore, author contributions may be collected within specific, journal defined workflows. For example, a journal with a high rejection rate may determine it is not worth requiring authors making an original submission to include CRediT data but it is worth requiring CRediT data in revisions which carry a higher rate of acceptance.

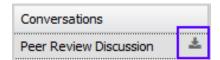


Conversation Tool Updates

Conversation Tool - UI Enhancements

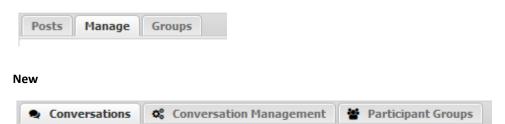
UI updates were made to dropdowns, icons, column widths, etc. plus:

- Improved load time for selecting participants
- Added ability to download the conversation as a PDF. Posts hidden by a Moderator will not be displayed



• Relabeled Tabs (Note: Tabs are only displayed when the user has permission to view it)

Old



• Staff can be configured as a Moderator and gain the ability to hide inappropriate comments:

Post displayed with "Hide post" link for Moderators

Firstname Lastname DD-MMM-YYYY 00:00:00 EDT If you have a problem and no one else can help, and if you can find them, maybe you can hire the A-team.

<u>Hide post</u>

Post hidden to all users except Moderators

Firstname Lastname DD-MMM-YYYY 00:00:00 EDT If you have a problem and no one else can help, and if you can find them, maybe you can hire the A-team.

Post Hidden - Show post

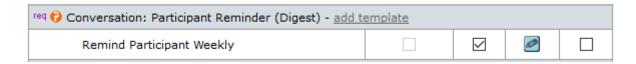
Note: Posts hidden by the conversation Moderator will still display in the ScholarOne DTD

Conversation Tool - New Automated Email

A new weekly reminder email template will be available to encourage participation in conversations. This automatic email is sent weekly to added participants. It is a digest of their never-before-read conversations since the previous digest email was sent. If they have visited a specific conversation, it will not be on the list within the email.

This email will not be sent when the participant has viewed all conversations at least once or when the conversation's manuscripts are archived.

This email can be found within Misc. Event-Driven E-Mails and is *user*-centric since one digest can point to conversations on many documents. Therefore, it will not appear in a manuscript's audit trail.



New Email Tag, ##UNREAD_CONVERSATIONS_LIST##

This new tag displays ##DOCUMENT_NO##, ##DOCUMENT_TITLE##, and ##CONVERSATION_TITLE##. It will repeat as new rows for all unread (a.k.a. "unviewed") conversations.

New Email Tag, ##GO_TO_UNREAD_CONVERSATIONS_QUEUE##

This tag will create a deep link to the user/participant's unread conversation queue, after signing in.

Conversation Tool - New Admin Queue, "Manuscripts with New Posts"

Clicking on this link will display a queue with manuscripts that have new posts since the user last viewed the conversation for that manuscript. For consistency with the feature, "Active" was changed to "Open".

Note: This link needs to be configured on in the Dashboard configuration by your Client Solution Services representative.

OLD NEW

Conversations

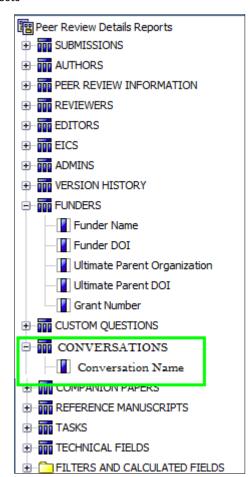
Active Conversations

- 1 Manuscripts with Active Conversations
- 3 Manuscripts with Open Conversations
- 1 Manuscripts with New Posts

Conversation Tool – Cognos Reporting

A new subtopic called "Conversations" will be added to the Peer Review Detail, between Custom Questions and Companion Papers. New data elements:

- Conversation Name
- Conversation Status
- Conversation Original Open Date
- Conversation Final Close Date
- # of Posts



Conversation Tool – DTD Export

In the ScholarOne DTD, conversations will export as an optional element called <conversations> directly after the <fundref_information> element.

Example:

<post_content>This article does not fit our journal</post_content>

</conversation>

</conversations>

Notes:

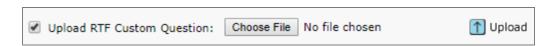
- Posts hidden by the conversation Moderator will still display in the ScholarOne DTD.
- Each post will have an attribute indicating if the post was hidden by the Conversation Moderator.

Document-Based Tags on Proof

</post>

Journals will now have the option to add Custom Question responses to the second page of the manuscript proof via an RTF upload utilizing existing document-based tags.

• From Submission Configuration, Configuration navigate to the Proof section.



- Include Text and Document-based Tags in the RTF file.
- Mark the checkbox, Choose File, and Upload.
- When activated, the RTF questions will appear on the second page of the proof.
- If a question is not responded to by the submitting user, No Data Available will appear.

_		
Evam	_	00
EXAIII	U	IES.

RFT Input Value			Proof Output		
1.	Manuscript Type: ##CUST_MANUSCRIPT_TYPE##	1.	Manuscript Type: Original Article		
Review	ers & Editors	Review	ers & Editors		
1.	How many Reviewers would you like to have?: ##CUST_HOW_MANY_REVIEWERS_WOULD_YOU_LIKE_TO_HAVE##	1.	How many Reviewers would you like to have?: I would like to have 1 Reviewer.		
2. 3.	How many Editors would you like to have?: ##CUST_HOW_MANY_EDITORS_WOULD_YOU_LIKE_TO_HAVE## Please select Reviewers: ##CUST_PLEASE_SELECT_REVIEWERS##	2.	How many Editors would you like to have?: I would like to have 1 Editor.		
3.	Trease select Neviewers: ##eds1_1 EE/GE_SEEE01_NEVIEWERS##	3.	Please select Reviewers: No data		
Details & Comments			& Comments		
1. 2.	Number of Black & White Figures: ##CUST_NUMBER_OF_BLACK_&_WHITE_IMAGES## Number of Tables: ##CUST_NUMBER_OF_TABLES##	1. 2.	Number of Black & White Figures: 0 Number of Tables: 2		

GDPR Admin Removal

A Remove this Person (GDPR) link has been added to the Account Information tab of the Person Details pop up. The link will only appear if the following conditions are met:

Administration Options:

Remove this person (GDPR)

Click here to send person login information.

- The User must have Author and Reviewer roles only.
- The User has no pending submissions. Submissions must be decisioned.
- The User has no pending reviewer assignments.
 Reviews must be reassigned or submitted.
- On click an alert will be called warning the action may not be reversed by ScholarOne.
- Acceptance of the alert GDPR removes the account.

Broadcast Email Change

With v4.24 Broadcast Email Searches will exclude users who have opted out of the Marketing Emails question on the User ID / Password step of account creation.

Publons: Credit for Completed Reviews

Publons allows academics to track, verify, and showcase their peer review and academic contributions for journals.

ScholarOne is expanding Publons functionality by adding the ability for users to seek credit for historical reviews already completed.

- A new queue is being added to the Review Center called Reviews Pending Publons Credit.
 - To receive credit, select the checkbox next to the appropriate manuscript and then Get Publons Credit.
 - o A success message will confirm the transfer of data to Publons.



☆ Review(s) successfully submitted to Publons.

Important Note: This queue will only appear for those clients using the official Publons question (will not appear for those clients using the older custom question model). Changing from the custom question to the official Publons question will change your DTD output. To request this change please contact our Customer Care team at ts.mcsupport@clarivate.com.

Reviews	s Pending Pul	blons Credit	
INCLUDE	COMPLETED	ID/TITLE	STATUS
	15-Nov-2010	WRK1-1348 4.5 release Files archived •	Major Revision (15-Nov-2010) a revision has been submitted Archiving completed on 24-Dec-2011 Assignments: ADM: Ferrell, Dan

Ringgold Updates

Ringgold Improved Search

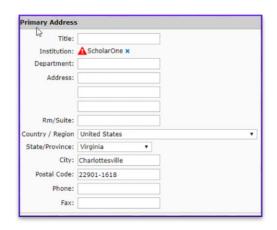
With 4.24, ScholarOne is thrilled to release an updated Ringgold search tool. Gone are the days where users struggled to find their institution in the Ringgold database. Improved algorithms, filters, and search dynamics mean that users will find institutions in the Ringgold database with greater ease.

Ringgold Connection Alert

A Ringgold ID is a unique identifier applied to organizations to facilitate the management of institutional affiliations. In release 4.24, we will begin to alert users when their institution is not connected to a Ringgold ID.

- A warning icon will appear next to any institution not connected to Ringgold.
- An institution that is not connected to Ringgold will not prevent submission.
- On hover, the warning icon will display a tool tip advising "This institution is not connected to Ringgold. Visit our FAQ on why a Ringgold connected institution is important."
- To remove the warning icon a user only needs to edit their account and choose a Ringgold connected Institution.

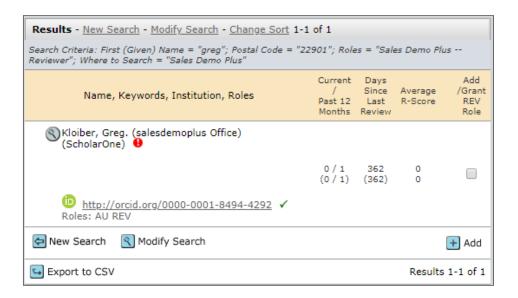




Update to Conflict Alerts in Advanced Reviewer Search

In v4.24 ScholarOne Manuscripts will make updates to the conflict of interest alerting available in the Advanced Research Search. Up to this point, the Advanced Search has triggered a conflict of interest warning if a reviewer in the search results shared an institution or postal code with the corresponding author of the paper. Based on client feedback we will be making a few changes to this alert logic to provide more meaningful information to our users.

- After the 4.24 release, the conflict of interest alert will be added to reviewer results which share an institutional or
 postal code with any of the authors on the submission, not just the corresponding author.
- Matches based on a postal code in the United States will only require the first 5 digits to trigger an alert, ignoring the "plus-four code".



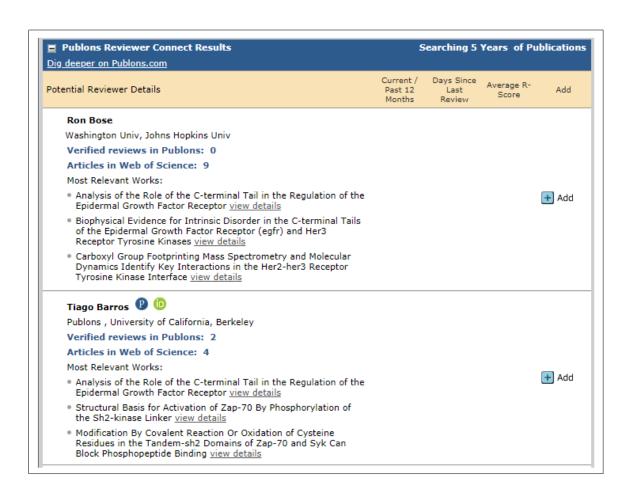


Publons Reviewer Connect

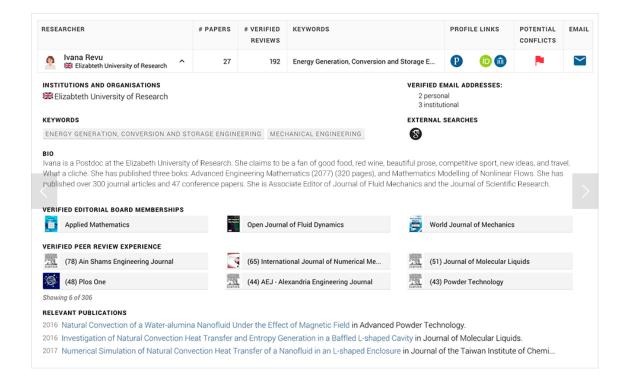
The *ScholarOne Manuscripts* v4.24 release will integrate *Publons Reviewer Connect* directly into the reviewer invitation workflow, making it easier than ever to find, screen and connect with well-qualified reviewers.

Seamlessly integrated like ScholarOne's existing Reviewer Locator service, *Publons Reviewer Connect* is the next leap forward for connecting journals with knowledgeable, engaged peer reviewers. Every search looks at over 10 million authors from the *Web of Science* Core Collection citation indexes and Publons' exclusive peer review database. Delivering up to 30 precise recommendations, you can easily see a reviewer's publications, peer reviews and availability. Desired reviewers can quickly be added to a manuscript's reviewer invitation list.

Publons Reviewer Connect will give journal the option to customize the search period to 3, 4 or 5 years depending on preference allowing each journal to align the search criteria with the pace of research in their respective field.



Each set of results in ScholarOne will be linked directly the Publons' platform so users can quickly see additional information on the reviewer's Publons profile or additional search details. This new integration will also flag reviewers with potential conflicts created by prior co-authorship which can easily be invested.



If you are interested in the benefits of *Publons Reviewer Connect*, please contact your ScholarOne Relationship Manager for more information.