Changelog

- 2015-05-10
  - Email template: remove support for the export of reviewer’s comments to editor.

- 2015-03-13
  - Review form question: added significantly more details for how to configure.
    Thanks to Stefan Koernig at Wiley for his assistance

- 2015-03-09
  - Email template: renamed editor tags from PUBLONS_PROLE_xEDITOR to PUBLONS_EDITOR_PRIMARY; updated documentation
  - Email template: removed other unnecessary tags (PUBLONS_USER, etc)
  - Email config: simplified subject/name from SW:Publons:Review:Export to Publons:Review:Export

- 2014-12-31
  - Initial version
Intro
This document details how to integrate a ScholarOne journal with Publons. This allows publishers to automatically offer an official form recognition to reviewers on the Publons platform upon completing their review. This is achieved by:

1. Updating the Reviewer Invitation email
2. Creating a new Review is Complete email
3. Adding a custom question to the reviewer scoresheet

To set up this integration access to the ScholarOne Admin Center is required to edit the email templates. To add a question to the reviewer scoresheet you will either need Full Configuration access or to contact ScholarOne Strategic Client Solutions here. Setup should take approximately 15 minutes per journal.

Before you begin
Ensure you have received the PUBLONS_TOKEN. This is key is specific to each journal and is essential for authenticating reviews on Publons. This is discussed in section 3.
1. Update Reviewer Invitation email
Add text to the email to inform reviewers that they can opt in to get recognition for their review on Publons. You can use the example below or edit to suit your journal.

*We are collaborating with Publons to give you the option to receive official credit for your review on Publons.com. You can learn more about how this works at [https://publons.com/in/publisher/](https://publons.com/in/publisher/).*

**Steps:**
1. Admin Center > Email Templates > Invitation E-Mails
2. Update both the submitted and revised workflow emails

2a. Create a new Review is Completed email
To properly recognize reviewers, Publons needs the review and reviewer details. These are sent to Publons once the review is completed via a custom email.

**Steps:**
1. Admin Center / Email Templates / E-Mails Notifications and Reminders
2. Create a new template by selecting the “add template” button next to the “Reviewers Score” task for the “Submitted” workflow. Repeat for the “Revised” workflow.
3. Enter the following:

<table>
<thead>
<tr>
<th>Name</th>
<th>SW:Publons:Review:Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
<td>##EMAIL_CONTACT_ADMIN_CENTER_EMAIL##</td>
</tr>
<tr>
<td>To:</td>
<td><a href="mailto:review@s1.publons.com">review@s1.publons.com</a></td>
</tr>
<tr>
<td>Subject</td>
<td>Publons:Review:Export</td>
</tr>
<tr>
<td>Body:</td>
<td>Enter the details in step 3 of this document</td>
</tr>
</tbody>
</table>
4. Once created the email template should be configured as follows:

<table>
<thead>
<tr>
<th>Submitted Workflow Tasks</th>
<th>Publons:Review:Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Before Sending</td>
<td>Unticked</td>
</tr>
<tr>
<td>Active</td>
<td>Ticked</td>
</tr>
<tr>
<td>When Task Enters?</td>
<td>Completed</td>
</tr>
<tr>
<td>Reminder Days</td>
<td>Empty</td>
</tr>
</tbody>
</table>

Note:
- This process needs to be repeated for the revised workflow to give reviewers credit for multiple rounds of review.

2b. The full email body

The integration requires the following data be transmitted through email tags. You will need to ensure the sections **highlighted in red** are custom to your journal:

- **PUBLONS_TOKEN** - unique to your journal and provided by Publons
- **PUBLONS_DOCUMENT** - the manuscript under review
- **PUBLONS_EDITOR_PRIMARY** - the editor role which makes the decision. Use your ScholarOne specific tags for this section.
- **PUBLONS_EDITOR_SECONDARY** - any editor role which supports the primary editor. Use your ScholarOne specific tags for this section.
- **PUBLONS_PERSON** - the reviewer
3. Adding a custom question to the reviewer scoresheet

To ensure reviewers opt in to the Publons service, Publons supports the ability to add a custom reviewer question. You can add this question if you have full configuration rights in ScholarOne. If you do not have that level of permission, you can have the ScholarOne Strategic Client Solutions team add it by clicking here.

1. Go to “Task configuration” and click “edit score sheets”:
2. If the new window says “No details have been created.” then a detail (question to show on the review form) must be created with the name “Publons”. Enter the name and then click “Go”:

![Image of a window with a red box around “Add Questions” and a green box around “Configure Layout”]

3. Once the page reloads you will be able to add the specific question and configure its layout. Click on “Add Questions” (red) now but remember “Configure Layout” (green) for later:

![Image of a window with a red box around “Add Questions” and a green box around “Configure Layout”]

4. In the question window enter the following:
   
   - “Question Name”: “PUBLONS_Reviewer_Opt_In"
     
     Note that because the question is named “PUBLONS_Reviewer_Opt_In” means the custom email tag will be “##CUST_PUBLONS_REVIEWER_OPT_IN##”.
   
   - “Question Text”: “Do you want to get credit for reviewing this manuscript on Publons? [a href=”https://publons.com/in/[publisher]” target=”new”>what’s this?</a]<br> By selecting “Yes” you are opting in to the Publons service and data about this review (including your name and the review itself) will be transferred to Publons. You may opt-out of the service at any time.”
   
   - Enter the other settings as pictured below then click “Save” and close the window:
5. Now click "Configure Layout" (marked in green in step 3 above)

Warning: once the layout of the question is configured and displayed it will show on ALL manuscripts for this journal, legacy and current.
Create a 1x3 table:

Fill the three cells as follows, all with answer values from the question “Publons” (as named in step 2 above):

Note: if you have pre-existing custom questions on the reviewer score sheet we suggest you place the “Publons” section at the top.

In order to ensure the tag data are correctly transmitted to Publons, it is necessary to confirm that the task is configured to allow the full score sheet to be exported.

In task configuration in the admin section, configure the form as follows:

7. Finally, make sure the new layout is visible to reviewers by checking the box that is now visible in the “edit score sheets” view (described in step 1 above):
Note that this needs to be done for all relevant workflows (submitted, reviews, and resubmitted).

The review form should appear on the review form as follows: