



Welcome to the 16TH Annual **EMUG** **BOSTON**

#EMUG2018

 Editorial Manager®  ProduXion Manager®



Increased Convenience for Editors

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Increased Convenience for Editors

- Sign Posting
- Automated Editor Summary Reminders
- Automated Reminders
- Editor Decision and Decision Phrases
- Editor Specific Configuration Options
- My Reviewer Preferences
- Assign Only Specific Editor Role Permissions
- Reviewer Discovery
- Duplicate Submission check
- Flags

Sign Posting

Prioritise Late Submissions

Sign Posting

- Submissions are placed in folders subject to their current status and the type of action they require next.
- On the Editor Main Menu page users can see the folder names and the number of submissions in those folders.
- In version 14.0 we introduced colour-coded signposts which enable Editors to see at a glance which folders contain submissions which require attention most urgently.
- The publication can define the time thresholds for each status to highlight submissions by priority:
 - On Schedule
 - Needs Attention
 - Late

Sign Posting

Editor 'To-Do' List

My Pending Assignments (107)

-  New Submissions (20)
-  Revised Submissions (2)
-  New Submissions Requiring Assignment (1)
- Revised Submissions Requiring Assignment (0)
-  Incomplete Submissions (2)
-  New Invitations (10)
-  New Assignments (8)
-  Submissions with Rescinded Decision (2)
-  Submissions with Required Reviews Complete (9)
-  Submissions Requiring Additional Reviewers (11)
-  Submissions with One or More Late Reviews (2)
- Submissions with Active Discussions (45)

Reviews in Progress (27)

-  Reviewers Invited - No Response (11)
-  Submissions Under Review (26)

Sign Posting

- Colour-coding extends into the folders, where Editors can see which individual submissions require attention as priority, relative to the configured time thresholds.

▲ ▼	▢ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼
	View Submission Details ▾ History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Set Final Disposition Initiate Production	SAMDEV140-D-17-00005	Original Study	Basic Science Section	Busy People	Lois Lane, PhD	Feb 16, 2017	Mar 13, 2017	Required Reviews Completed
	View Submission Details ▾ History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production	SAMDEV140-D-17-00020	Special Issue QA3		Testing again TT31202 3-14-17 Blizzard day.	Fran Forest	Mar 14, 2017	Mar 14, 2017	With Editor
	View Submission Details ▾ History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production	SAMDEV140-D-17-00022	Original Study		A Study of Spring	Rocky Rhodes	Mar 16, 2017	Mar 16, 2017	With Editor
	View Submission Details ▾ History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production Submit Editor's Decision and Comments	SAMDEV140-D-17-00023	Original Study		Snow Crystals	Oliver Ocean	Mar 16, 2017	Mar 16, 2017	With Editor

Sign Posting – Configuration

- In Policy Manager, under General Policies, select “Configure Warning Thresholds” to set the “Needs Attention” and “Late” thresholds.
- Then in Role Manager update each Editor Role for which signposting should appear and check (enable) the box next to “View Warning Status Signposts” under General Searching and Viewing.

Configure Warning Thresholds

These warning thresholds are used to determine whether individual submissions in a folder "Need Attention" or are considered "Late" based on how long they have been in the folder.

- If an Editor has permission to view them, color bars that look like traffic lights are displayed on an Editor's Main Menu to summarize how long the submissions have been in a folder, (e.g. ``). Similarly, in folders, individual submissions are marked with a color to indicate how long they have been there.
- Automated Editor Summary Reminders use the thresholds to determine whether to send a reminder when one is due, and if one is due, to indicate how long the submissions have been in the folders.

The number of days that a submission has been in a folder indicates whether it is: 'On Schedule', 'Needs Attention' or 'Late': `<ul style="margin-bottom:0px;">`

- 'On Schedule' (green): `<` than the number of days specified for 'Needs Attention'
- 'Needs Attention' (amber): `>=` the number of days specified for 'Needs Attention' but `<` the number of days specified for 'Late'
- 'Late' (red): `>=` the number of days specified for 'Late'

[\(less...\)](#)

Editorial Submissions in Progress

Needs Attention: Days since submission began

Late: Days since submission began

Transferred Submissions

Needs Attention: Days since initial date submitted

Late: Days since initial date submitted

New Submissions

Needs Attention: Days since initial date submitted

Late: Days since initial date submitted

View All Submissions

View Completed Reviews Grid in Main Menu

View Warning Status Signposts

View Additional Manuscript Details

Automated Editor Summary Reminders

A Helpful Reminder for Your Editors



Automated Editor Summary Reminders (AESRs)












- These are reminder emails sent to Editors at regular intervals that summarise an Editor's assignments from 3 key folders in the Editor's To Do List to help remind Editors of what needs doing and what to prioritise.
- In version 14.0 the AESRs were enhanced and can now provide information from up to 11 assignment related Editor Main Menu Folders.
- Both the folder summary and the details report can include folders from the Editor's To Do List and the Subordinate Editor's Pending Assignments sections.
- The details report also pulls in information on review status.
- Easier to read and more visually appealing.
- For Rich Text (HTML) emails the new format uses the same colour coding as the Editor signposting.

Automated Editor Summary Reminders (AESRs)

Dear Sam,

Here's a summary of various folders from your Editor Main Menu. Folders marked with red or amber require attention.

Folder Summary as of March 3, 2017

	New Invitations (2)
	New Assignments (1)
	Submissions with Rescinded Decision (1)
	Submissions with Required Reviews Complete (7)
	Submissions Requiring Additional Reviewers (4)
	Submissions with One or More Late Reviews (2)
	Reviewers Invited - No Response (11)
	Submissions Under Review (14)
	Group by Editors I Assigned (2)
	Group by Editors with Current Responsibility (2)
	Group by Manuscript Status (2)

You may click this link to log in and go to your Editor Main Menu: [Editor Main Menu](#)

Regards,
ACME Journal

- The HTML AESR showing colour coding, enhanced formatting and deeplinks.

- The Email recipient can see at a glance which folders have assignments that need attention or are behind schedule.
- The emails can be configured to show a folder summary and/or submission lists.
- Folder names can be listed in the letter as deeplinks that will log the recipient into EM and go directly to the folder.
- A plain text version of the AESRs also available – no colour coding or enhanced formatting.

Automated Editor Summary Reminders (AESRs)

Dear Sam,

Here are lists of submissions from various folders in your Editor Main Menu. Submissions marked with red or amber need attention.

Submission Lists as of March 3, 2017

New Invitations (2)

Submission	Submitted # Days Ago	Status (# Days)	Editor Name	Accept/Decline
JANETDEV122-D-15-00037	submitted 22 days ago	Editor Invited (19 days)	Sam Jones, PhD	Accept Editor Invitation Decline Editor Invitation
<p>Title: Critical Cervical Involvement of Endoplasmic Reticulum Associated with Diagnosis in Patients with a Prodrome of a Homogenous Population Genetic Structure of the Bright Red Fluorescent Protein in Cave-Inhabiting Fauna with Transcranial Magnetic Stimulation</p> <p>Authors: Frank Oliver Glockner, PhD, ACME Institute for Microbiology; Wolfgang Hankeln, PhD, ACME Institute for Microbiology; Jost Waldmann, PhD; ACME Institute for Microbiology</p> <p>Abstract: This study assesses the biogeographic classification of the Western Indian Ocean (WIO) on the basis of the species diversity and distribution of reef-building corals. Twenty one locations were sampled between 2002 and 2011. Presence/absence of scleractian corals was noted on SCUBA, with the aid of underwater digital photographs and reference publications for species identification. Sampling effort varied from 7 to 37 samples per location, with from 15 to 45 minutes per dive allocated to...</p>				
JANETDEV122-D-15-00071	submitted 2 days ago	Editor Invited (1 day)	Sam Jones, PhD	Accept Editor Invitation Decline Editor Invitation
<p>Title: Bright Red Fluorescent Protein in Cave-Inhabiting Fauna with Transcranial Magnetic Stimulation</p> <p>Authors: Julia Sylvan, Phd, University of Edinburgh</p> <p>Abstract: This is the abstract, for which up to 75 words will be displayed, followed by an ellipsis, if it is longer than 75 words.</p>				

New Assignments (1)

Submission	Submitted # Days Ago	Status (# days)	Editor Decision
JANETDEV122-D-15-00071R1	submitted 7 days ago	Received by Editor (3 days)	Revise
<p>Title: Secret Formulas for Soda Flavors</p> <p>Authors: June Hemmick</p> <p>Abstract: This is the abstract, for which up to 75 words will be displayed, followed by an ellipsis, if it is longer than 75 words.</p>			

Submissions with Rescinded Decision (1)

Submission	Submitted # Days Ago	Status (# days)	Review Status	Editor Decision
JANETDEV122-D-15-00020	submitted 61 days ago	Required Reviews Complete (11 days)	2 Complete # of Req'd Reviews: 2	
<p>Title: Autumn Structures</p> <p>Authors: Amélie Chloé Chevalier, MD, University of Ottawa; Olivier Pine, MD, Universidad de los Andes; François Banacos, MD, Robert Koch Institute; Mercy Bedelia, MD, PhD, Institute of Cytology and Genetics; Yiman Nahabedian, MD, MicroDish BV; Hyan Samosa, MD, Yale University School of Medicine</p> <p>Abstract: This is the abstract, for which up to 75 words will be displayed, followed by an ellipsis, if it is longer than 75 words.</p>				

- Submission lists show the contents of Editor folders including details such as title, author(s), abstract and review status.
- Submissions also have a colour-coded outline to indicate whether submissions need attention.

Automated Editor Summary Reminders (AESRs) Merge Fields

- In the 14.0 enhancements there are 2 new merge fields for use only in AESRs:

%EDITOR_REMINDER_FOLDER_SUMMARY% - pulls in folder summary

%EDITOR_REMINDER_SUBMISSION_LISTS% - pulls in submission list

- The Enhancement also introduces two similar merge fields for use in any letter to an Editor whose Editor Role has the "Receive Assignments" permission:

%EDITOR_ASSIGNMENT_FOLDER_SUMMARY%

%EDITOR_ASSIGNMENT_SUBMISSION_LISTS%

- These two any-letter fields summarise information from all 11 assignment-related Editor folders (excluding the New Invitations folder if the recipient Editor role does not have permission to receive invitations for assignments).

Automated Editor Summary Reminders – Configuration

- To configure the enhanced AESR functionality, log into Policy Manager and, under General Policies, select “Configure Warning Thresholds” to set the “Needs Attention” and “Late” times (otherwise the colour-coding in the emails will reflect the default).
- Next under Email and Letter Policies, select “Edit Letters” to edit an existing letter or create a new one in the Editor Reminder Family.
- If you are not already using the enhanced AESR merge fields these will need to be added into the letter body.
- Finally, go to **Configure Automated Summary Reminders** (under Editor Assignment Policies) to set up the reminders for Editor Roles with permission to receive assignments.
- Check the boxes for folders to include and indicate (by selecting a radio button) when to include the folder's information: always, only if items need attention, or only if items are late. These designations correspond to the colour-coding.
- To include Author List and/or Abstract check the applicable boxes.

	Always <i>i</i>	Needs Attention <i>i</i>	Late <i>i</i>
<input checked="" type="checkbox"/> New Invitations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> New Assignments	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Submissions with Rescinded Decision	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Submissions with Required Reviews Complete	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Submissions Requiring Additional Reviewers	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Submissions with One or More Late Reviews	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Reviewers Invited - No Response	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Submissions Under Review	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Group by Editors I Assigned	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Group by Editor with Current Responsibility	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Group by Manuscript Status	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Automated Reminders

Automated with a Personal Touch!



Automated Reminders

- Editors and/or Admins can set up Automated Reminder Reports to send out reminders to Authors/Reviewers.
- This is permission based (Role Manager).
- This permission can also be restricted to only submissions assigned to that Editor.
- Saves time.
- A reminder can also be restricted to one or more Article Types or Section/Categories.

Automated Reminders - Author

Authors:

- Automated Author Revision Reminder Report
- Automated Author Transfer Reminder Report

Invited Authors:

- Automated Author Invitation Reminder Report

Send Reminder Letters

Click a link below to access the reminder report, from which reminder letters can be sent.

Author Reminder Reports

[Co-Author Reminder Report](#)

[Author Revision Status Report](#)

[Author Revision Reminder Report](#)

[Automated Author Revision Reminder Report](#)

[Automated Author Transfer Reminder Report](#)

Invited Author Reminder Reports

[Authors Invited - No Response](#)

[Author Invitation Status Report](#)

[Automated Author Invitation Reminder Report](#)

Automated Reminders – Author Revision

Automated Author Revision Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Author Revision reminder e-mails will be sent once every 24 hours to each recipient.

Reminder Type:	<input checked="" type="radio"/> Outstanding Revisions: Send an automated reminder e-mail to Authors who were asked to revise their submission exactly <input type="text" value="10"/> days ago. If Authors have already submitted their revision or have declined to revise, they will not receive a reminder.
	<input type="radio"/> Reminder Before Revision Due Date: Send an automated reminder e-mail for revisions that are exactly <input type="text" value="7"/> days before their due date. Reminders will be sent to Authors who have agreed to submit a revised manuscript but have not yet submitted their revision.
	<input type="radio"/> Reminder Past Revision Due Date: Send an automated reminder e-mail for revisions that are exactly <input type="text" value="7"/> days past the due date. To send reminders for revisions that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who were asked to revise their submission, but have not submitted their revision or decline to revise.
First Assigned Editor:	<input type="text" value="(All Editors)"/>
Editor Who Made First Decision:	<input type="text" value="(All Editors)"/>
Reminder Name:	Insert Special Character <input type="text"/> <i>Maximum 200 characters</i>
Reminder Letter:	<input type="text" value="Please Choose an Automated Reminder L"/>
<p>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.</p>	
Article Type:	<input type="text" value="Original Study"/> Select All <input type="text" value="Editorial"/> Clear All <input type="text" value="Review"/> Clear All <input type="text" value="Rapid Communication"/> Clear All
Section/Category:	<input type="text" value="Basic Science Section"/> Select All <input type="text" value="Clinical Section"/> Clear All <input type="text" value="Epidemiology Section"/> Clear All <input type="text" value="No Section Assigned"/> Clear All

[Save as Automated Reminder](#)

Automated Reminders – Author Transfer

Automated Author Transfer Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Author Transfer Reminder Report will be run once every 24 hours to send reminder e-mails to Authors who have outstanding transfer requests that meet the report's criteria.

Reminder Type:	<input checked="" type="radio"/> Reminder Before Transfer Offer Expires: Send automated reminder e-mails to Authors whose transfer offers expire in exactly <input type="text" value="29"/> days. If Authors have already accepted or declined a transfer offer, or their transfer offer has expired, they will not be sent a reminder. Enter a number from 1 to 90.
	<input type="radio"/> Reminder After Transfer Offer Sent: Send automated reminder e-mails to Authors who were sent transfer offers exactly <input type="text" value="29"/> days ago. If authors have already accepted or declined a transfer offer, or their transfer offer has expired, they will not be sent a reminder. Enter a number from 1 to 90.
First Assigned Editor:	<input type="text" value="(All Editors)"/>
Editor Who Made First Decision:	<input type="text" value="(All Editors)"/>
Reminder Name:	Insert Special Character <input type="text"/> <i>Maximum 200 characters</i>
Reminder Letter:	<input type="text" value="Please Choose an Automated Reminder L"/>
<p>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.</p>	
Article Type:	<input type="text" value="Original Study"/> Select All <input type="text" value="Editorial"/> Clear All <input type="text" value="Review"/> Clear All <input type="text" value="Rapid Communication"/> Clear All
Section/Category:	<input type="text" value="Basic Science Section"/> Select All <input type="text" value="Clinical Section"/> Clear All <input type="text" value="Epidemiology Section"/> Clear All <input type="text" value="No Section Assigned"/> Clear All

[Save as Automated Reminder](#)

Automated Reminders - Reviewer

Reviewers:

- Automated Reviewer Reminder Report

Reviewer Reminder Reports

[Reviewer Invited - No Response Report](#)

[Reviewer Reminder Report](#)

[Automated Reviewer Reminder Report](#)

Automated Reminders - Reviewer

Automated Reviewer Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the automated reviewer reminder e-mails will be sent once every 24 hours to each recipient.

Reminder Type:	<input checked="" type="radio"/> No Response. Send Reminder: Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly <input type="text" value="5"/> days ago. Reminders will be sent to Reviewers who have neither accepted nor declined the review invitation, and have not been un-invited or terminated.
	<input type="radio"/> Reminder Before Due Date: Send an automated reminder e-mail for reviews that are exactly <input type="text" value="10"/> days before their due date. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.
	<input type="radio"/> Reminder Past Due Date: Send an automated reminder e-mail for reviews that are exactly <input type="text" value="7"/> days past the due date. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.
Reviewer Role:	(All Reviewers) ▾
Handling Editor:	(All Editors) ▾
Reminder Name:	Insert Special Character <input type="text"/> <i>Maximum 200 characters</i>
Reminder Letter:	Please Choose an Automated Reminder Letter ▾

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:	Original Study Editorial Review Rapid Communication	^ Select All v Clear All
Section/Category:	Basic Science Section Clinical Section Epidemiology Section No Section Assigned	^ Select All v Clear All

Save as Automated Reminder

Automated Reminders – Configuration 1

- In Policy Manager, E-mail and Letter Policies, Edit Letters, add/edit reminder letters (in the Reviewer/Author Reminder Letter Family).
- Now go to **Send Reminder Letters** in the Administrative Functions section of the Main Menu (ARs can also be accessed through **Reports**).
- Select the link for the automated reminders you would like to create.

Send Reminder Letters

Click a link below to access the reminder report, from which reminder letters can be sent.

Author Reminder Reports

[Co-Author Reminder Report](#)

[Author Revision Status Report](#)

[Author Revision Reminder Report](#)

[Automated Author Revision Reminder Report](#)

[Automated Author Transfer Reminder Report](#)

Invited Author Reminder Reports

[Authors Invited - No Response](#)

[Author Invitation Status Report](#)

[Automated Author Invitation Reminder Report](#)

Editor Reminder Reports

[Assignment Status Report](#)

[New Assignments Report](#)

[Required Reviews Complete Report](#)

Reviewer Reminder Reports

[Reviewer Invited - No Response Report](#)

[Reviewer Reminder Report](#)

[Automated Reviewer Reminder Report](#)

ProduXion Manager Reports

[Submission Tasks Reminder Report](#)

[Automated Submission Tasks Reminder Report](#)

Automated Reminders – Configuration 2

Automated Reviewer Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the automated reviewer reminder e-mails will be sent once every 24 hours to each recipient.

Reminder Type:	<input checked="" type="radio"/> No Response. Send Reminder: Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly <input type="text" value="5"/> days ago. Reminders will be sent to Reviewers who have neither accepted nor declined the review invitation, and have not been un-invited or terminated.
	<input type="radio"/> Reminder Before Due Date: Send an automated reminder e-mail for reviews that are exactly <input type="text" value="10"/> days before their due date. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.
	<input type="radio"/> Reminder Past Due Date: Send an automated reminder e-mail for reviews that are exactly <input type="text" value="7"/> days past the due date. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.
Reviewer Role:	(All Reviewers) ▼
Handling Editor:	(All Editors) ▼
Reminder Name:	Insert Special Character <input type="text"/> <i>Maximum 200 characters</i>
Reminder Letter:	Please Choose an Automated Reminder L ▼

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:	Original Study ^ Select All Editorial Review Rapid Communication ▼ Clear All
Section/Category:	Basic Science Section ^ Select All Clinical Section Epidemiology Section No Section Assigned ▼ Clear All

[Save as Automated Reminder](#)

Automated Author Reminders – Coming Soon!

- Coming in version 15.0, Author Automated Reminders –
 - Incomplete.
 - Needs Approval.
- To allow sending automated reminders for authors where:
 1. A Submission has been started but not completed.
 2. A Submission PDF has been created but not approved.
 3. A Submission has been sent back to Author.

Automated Author Reminders – Coming Soon in v15.0!

Automated Author Submission Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the **Automated Author Submission** reminder e-mails will be sent once every 24 hours to each recipient.

Reminder Type:

- Incomplete Submissions:** Send an automated reminder e-mail to Authors who have submissions in the Incomplete Submissions folder that have been there for exactly days. Reminders will be sent to Authors who have begun to submit a manuscript and may not realize that they have not fully submitted it.
- Submissions Waiting for Author's Approval:** Send an automated reminder e-mail to Authors who have submissions in the Submissions Waiting for Author's Approval folder that have been there for exactly days. Reminders will be sent to Authors who have built a PDF of their submission but may not realize that they need to go to the Submissions Waiting for Author's Approval folder to finish submitting their manuscript by viewing the PDF and approving it.
- Submissions Sent Back to Author:** Send an automated reminder e-mail to Authors who have submissions in the Submissions Sent Back to Authors folder that have been there for exactly days. Reminders will be sent to Authors who have not taken any action on their submission in the Submissions Sent Back to Authors folder.

Reminder Name:
Maximum 200 characters

Reminder Letter:

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:

Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them. Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the Drag & Drop tool.

There are currently no saved automated reminders.

[Return to Send Reminders](#)
[Return to Editorial Menu](#)

- Coming in version 15.0, Author Automated Reminders.
- Incomplete - submissions in the Incomplete Submissions folder that have been there for **exactly** [X] days.
- Needs Approval - submissions in the Submissions Waiting for Author's Approval folder that have been there for **exactly** [X] days.
- Sent back to Author - submissions in the Submissions Sent Back to Authors folder that have been there for **exactly** [X] days.

Automated Author Reminders – Coming Soon!

Configuration 1

Administrative and Reporting Functions

- System Administration Functions
 - Unrestricted Access
 - Restricted Access
- Produce Reports
 - Schedule Reports
 - Run Cross-Publication Custom Reports
- Create Automated Reviewer Reminders
- Send Reviewer Reminders
- Send Editor Reminders
- Create Automated Author Submission Reminders
- Create Automated Author Revision Reminders
- Create Automated Author Transfer Reminders
- Create Automated Author Invitation Reminders
- Send Author Reminders
- Restrict Reminder Reports to Assigned Submissions
- Search/Manage Conference Submissions
- Initiate Rebuttal
- Set Final Disposition

- Permission in Role Manager.
- In the Administrative and Reporting Functions section for Editor Role Manager permissions.

Automated Author Reminders – Coming Soon!

Configuration 2

Send Reminder Letters

Click a link below to access the reminder report, from which reminder letters can be sent.

Author Reminder Reports

- Co-Author Reminder Report
- Author Revision Status Report
- Author Revision Reminder Report
- Automated Author Submission Reminder Report
- Automated Author Revision Reminder Report
- Automated Author Transfer Reminder Report

Invited Author Reminder Reports

- Authors Invited - No Response
- Author Invitation Status Report
- Automated Author Invitation Reminder Report

← In “Send Reminder Letters”

In “Reports” →

Reports

Report Tools

- Enterprise Analytics Reporting
- General Data Export
- Custom Report
- Search/Manage Conference Submissions

Status Reports

- Accepted Manuscripts Without a Publication Date
- Current Status Report
- Publishing Pipeline Report
- Published Table of Contents Report
- Editor’s To-Do List Report
- Current Role Designations Report

Author Reminder Reports

- Co-Author Reminder Report
- Author Revision Status Report
- Author Revision Reminder Report
- Automated Author Submission Reminder Report
- Automated Author Revision Reminder Report
- Automated Author Transfer Reminder Report

Decision Phrases

Speak with the Same Voice



Decision Phrases

- Previously, Editors who routinely made the same comments during the decision process had to repeatedly type or cut and paste those comments every time they submitted a decision letter.
- For high-volume publications this can be time consuming (and error-prone).
- Editors may use different language.
- The Editor Decision Phrases enable publications to provide a consistent voice when communicating decisions with their authors.
- Saves Editors' time.
- First publications create a pool of Editor Decision Phrases for their Editors to use.
- When Editors are on the “Submit Editor’s Decision and Comments” page they can select any, all or none of the configured decision phrases to include in the letter.
- Phrases selected by the Editor populate a new merge field:

%EDITOR_DECISION_PHRASES%

Decision Phrases

Editor Instructions

Editor Decision Phrases

Preview Selected Phrases

Editor Decision Phrases available for inclusion in the Decision Letter are displayed below. Select the phrases you wish to include.

Select Phrase

- Editor Decision Phrase 1
- This allows you to create short snippets of text or longer sections of explanation for the body of the decision letter.
- They are also displayed when viewing the Editors recommendation.
- This is a very good paper which would benefit from some small changes prior to publication.

Confidential Comments to Editor

Insert Special Character Open in New Window

Please give a frank account of the strengths and weaknesses of the article:

AW Demo 14.0

Dear %TITLE% %LAST_NAME%,

Reviewers have now commented on your paper. You will see that they are advising that you revise your manuscript. If you are prepared to undertake the work required, I would be pleased to reconsider my decision.

For your guidance, reviewers' comments are appended below.

Editor Decision Phrase 1

This allows you to create short snippets of text or longer sections of explanation for the body of the decision letter.

This is a very good paper which would benefit from some small changes prior to publication.

If you decide to revise the work, please submit a list of changes or a rebuttal against each point which is being raised when you submit the revised manuscript.

Your revision is due by %DATE_REVISION_DUE%.

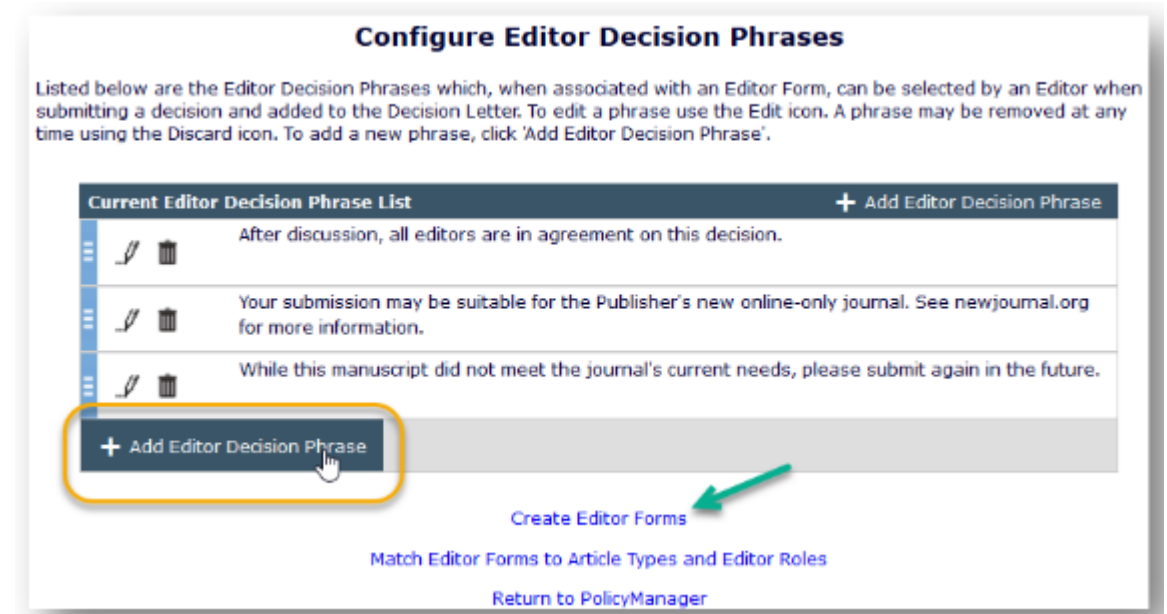
Decision Phrases

In View Reviews and Comments:

Eddie Editor (Editor) Edit Editor Comments	
Date Submitted:	Feb 28, 2017
Status Date:	Oct 19, 2017
Current Status:	Rebuttal
Final Disposition:	
Editor's Recommendation:	Reject
Overall Editor Manuscript Rating (1-100):	<input type="text" value="(1-100)"/> View Manuscript Rating Card
Date Assignment Completed:	Oct 19, 2017
Elapsed Days:	232
Editor Decision Phrases:	<p>Editor Decision Phrase 1</p> <p>This allows you to create short snippets of text or longer sections of explanation for the body of the decision letter.</p> <p>They are also displayed when viewing the Editors recommendation.</p> <p>This is a very good paper which would benefit from some small changes prior to publication.</p>
Editor's Comments to Editor:	<p>Please give a frank account of the strengths and weaknesses of the article:</p> <p>Reviewer, Reggie Reviewer: Is there a financial or other conflict of interest between your work and that of the authors?</p> <p>YES __ NO __</p>

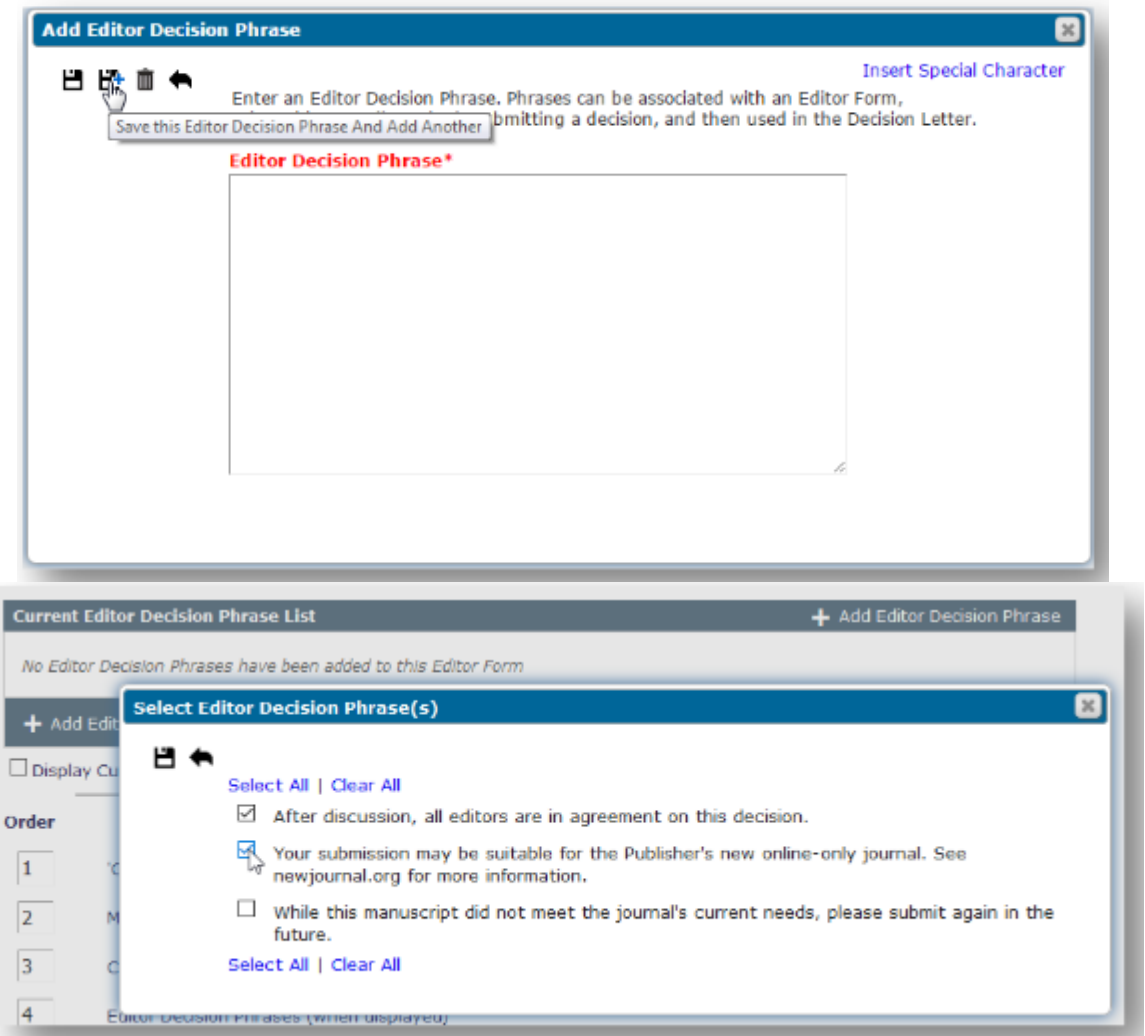
Decision Phrases – Configuration 1

- In Policy Manager, go to the Editor Decision Phrases section.
- Click the link to the “Configure Editor Decision Phrases” page.
- Click “Add Editor Decision Phrase” to open a pop up window.



Decision Phrases – Configuration 2

- Enter the phrase, save and continue to add more phrases as needed.
- Create new or edit existing Editor Forms where the phrases will be used (a link to the Create Editor Forms page is on the Configure Editor Decision Phrases page and in Policy Manager).
- Click “Add Editor Decision Phrase” to open pop up and check the appropriate phrases for the Editor Form and click save icon.
- The selected Phrases will then appear on the main form page.
- Finally, navigate to the Editor Form Configuration page and match the Editor Form to the appropriate Role and Article Types.



Sneak Peek - Coming Soon!

Editor Questionnaires

Coming in Version 16.0

NOTE: This is subject to change



Coming Soon! Editor Questionnaires in v16.0

This is subject to change

- Extends the Custom Review Question functionality to the Editor Form.
- Allows publications to collect specific information from their Editors as part of the peer review process during all revisions of a submission.
- Similar to current functionality, a Custom Review Question can be added to multiple Editor and/or Review Forms.
- Allows you to ask your Editors the same questions as your reviewers or different questions.
- Available for Decision Letter merging (using 2 new merge fields).

Editor Review Questions [Insert Special Character](#)

Do you have a pet? [\[Instructions\]](#)

No

Editor Question #1 (Limit 2000 Characters)

This is Sally Editor's response to Editor Question #1

Character Count: 53

Editor Question #2 (Limit 2000 Characters)

This is Sally Editor's response to Editor Question #2

Character Count: 53

Reviewer Questions and Responses

[Expand All](#) / [Collapse All](#)

Cindy Reviewer Reviewer 1	Roger Rabbit Reviewer 3	Karen Reviewer Reviewer 2
Do you have a pet?		
<input checked="" type="checkbox"/> Yes: I still have two cats.	<input checked="" type="checkbox"/> Yes: I have a Norwegian Elkhound	<input checked="" type="checkbox"/> No
Where did you go on vacation?		
<input checked="" type="checkbox"/> I went to Dublin and London	<input checked="" type="checkbox"/> France	<input checked="" type="checkbox"/> I stayed home
This is a large Notes response-type question		
At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem rerum facilis est et expedita distinctio. Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe eveniet ut et voluptates repudiandae sint et molestiae non recusandae. Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis voluptatibus maiores alias consequatur aut perferendis doloribus asperiores repellat.(less...)	At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem rerum facilis est et expedita distinctio. Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe eveniet ut et voluptates repudiandae sint et molestiae non recusandae. Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis voluptatibus maiores alias consequatur aut perferendis doloribus asperiores repellat.(less...)	

Editor Questions and Responses

[Expand All](#) / [Collapse All](#)

Michael Editor Section Editor	Another Editor Section Editor
Do you have a pet?	
<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No Response
Editor Question #1	
<input checked="" type="checkbox"/> This is Michael Editor's response to Editor Question #1	<input checked="" type="checkbox"/> This is Another Editor's response to Editor Question #1
Editor Question #2	
<input checked="" type="checkbox"/> This is Michael Editor's response to Editor Question #2	

Editor Specific Configuration Options

Personalise Your View

Power Grid and Quick Links

Personalise your view:

Quicklinks
Editor Main Menu

▼ Collapse

View All Assigned Submissions - mary mary



Contents: This page lists all submissions that have been assigned to an Editor, for which the Editor's decision has not yet been made. This includes submissions with invited Reviewers, submissions out for review, submissions requiring a decision, and submissions which have a subordinate Editor's decision but not a decision from the top Editor in the decision-making chain.

Page: 1 of 1 (3 total submissions)

1

50 results per page

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor with Current Responsibility	Review Status	Editor Decision
<ul style="list-style-type: none"> View Submission Details ▾ History Classifications File Inventory Edit Submission Invite Reviewers ▶ Solicit Commentary Notify Editor Set Final Disposition Initiate Production Search Publons Send E-mail Linked Submissions 	DEMO.2017.0007	RapidTestNo		Tea is Essential to Life!	Andy Author	Feb 23, 2017	Nov 23, 2017	Under Review	mary mary	2 Agreed 1 Late (more...)	
<ul style="list-style-type: none"> View Submission Details ▾ History Classifications Unassign Editor File Inventory Edit Submission Invite Reviewers ▶ Solicit Commentary Notify Editor Set Final Disposition Initiate Production Search Publons Send E-mail Linked Submissions 	DEMO.2017.0002	RapidTestNo		Test Title 2	Amy Author	Jan 18, 2017	Feb 21, 2017	W			

Grid Options

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

Column Header	Fixed	Show
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manuscript Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Section Category	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Author Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Initial Date Submitted	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Status Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Current Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Editor with Current Responsibility	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Review Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Editor Decision	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Cancel Submit



Saved Searches

For speed and convenience:

Quicklinks

Search Submissions - Search Results

Editorial Status is equal to 'Under Review'

Page: 1 of 1 (1 total submissions) 1

Action	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Keywords	Classification	Current Status	Status Date	Initial Date Submitted	Reviewer
View Submission Details Initiate Discussion History Technical Information File Inventory Edit Submission Solicit Commentary Classifications Assign Editor Notify Editor Invite Reviewers Set Final Disposition Initiate Production Search Publons Submit Editor's Decision and C Send E-mail Linked Submissions	DEMO.2017.0007	Andy Author	Tea is Essential to Life!	RapidTestNo				Under Review	Nov 23, 2017	Feb 23, 2017	Rosie Review Anna *

Save Search Criteria

Check the provided checkbox and click the "Submit" button again to overwrite the existing search with this one. Alternatively, enter a new name for your saved search before proceeding.

Criteria	Search Criteria Name
Editorial Status is equal to 'Under Review'	<input type="text" value="Under Review"/>
<input checked="" type="checkbox"/> Show this Search in Main Menus	

[Back to Search Results](#)
[New Search](#)
[Editor Main Menu](#)
[Production Tasks Menu](#)
[Production Status Grid](#)

Editorial Proposal Menu Production Tasks

Managing Editor Main Menu

Quick Searches:
[Under Review](#)

Editor 'To-Do' List

My Pending Assignments

- New Submission
- Revision
- New Submission
- Revision
- Submit
- New In Progress
- New Assignment
- Submit
- Submit
- Submit
- Submit
- Submit

Reviews in Progress

- Review
- Submit

My Reviewer Preferences


Personalise Reviewer Suggestion and Display

My Suggest Reviewer Preferences

Reviewer Selection Summary - Submission DEMO.2017.0007

Andy Author
Tea is Essential to Life!

Reviewer Search

- Search My Publication
- Reviewer Discovery from  ProQuest Community of Scholars

Review Settings

This Submission will move to the 'Submissions with Required Reviews Completed' when all reviews have been completed.

Automatically un-invite Reviewers who do not respond to an invitation within 0 days

Automatically un-assign Reviewers who do not complete a review within 0 days

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers

Anna Walton (Reviewer) <input type="button" value="v"/>	Agreed Nov 29, 2017
Rosie Reviewer (Reviewer) <input type="button" value="v"/>	Agreed Nov 23, 2017

My Suggest Reviewer Preferences

Exclude the following from the list:

- People from the same institution
- People from the same city

People with unavailable dates within the next days

People with more than pending reviews

People with fewer than matches to manuscript classifications

Sort the Candidate Reviewer list in order of importance by:

- Board membership
- Number of matches to manuscript classifications
- Number of pending reviews
- Average number of days reviews are outstanding
- Date last review completed
- Average Review Rating (Highest Ratings listed first)
- Total Number of Completed Reviews (Highest number displayed first)

My Reviewer Display Preferences

[Return to Submissions Under Review](#)

[Return to Main Menu](#)

View Submission Information
[Manuscript Details](#)

[Classifications](#)

[View Submission](#)

Quick Action Links
[Submit Editor's Decision and Comments](#)

[Send E-mail](#)

[Register and Select New Reviewer](#)

Set Preferences
[My Suggest Reviewer Preferences](#)

My Reviewer Display Preferences

Reviewer Selection Summary - Submission DEMO.2017.0007

Andy Author
Tea is Essential to Life!

Reviewer Search

Search My Publication

Reviewer Discovery from ProQuest Community of Sch

Review Settings

This Submission will move to the 'Submissions with Required Review been completed.

Automatically un-invite Reviewers who do not respond to an invita

Automatically un-assign Reviewers who do not complete a review

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers

[Anna Walton](#) (Reviewer)

[Rosie Reviewer](#) (Reviewer)

My Reviewer Display Preferences

Classifications

Please choose how you would like Classifications to be displayed on the Reviewer Selection results pages. This setting applies to all Reviewer search modes, except for Search by Personal Classifications.

Show only Classification matches with manuscript

Suppress Classifications

Show all Personal Classifications for the Reviewer candidate

Sort the Candidate Reviewer list in order of importance by:

You may also choose how the Candidate Reviewer lists are sorted. This sort preference applies to all Reviewer search modes, except for Suggest Reviewers, which has its own separate set of preferences.

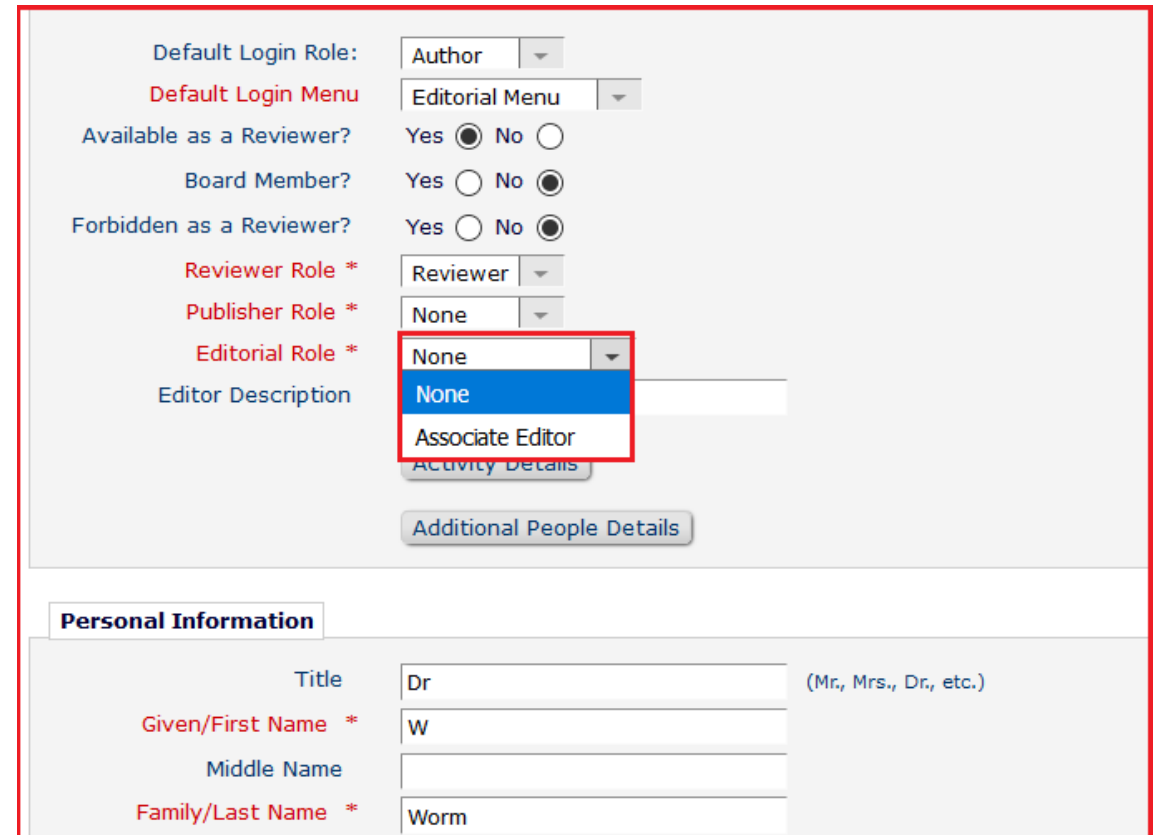
- Ascending Reviewer Name
- Number of Matches to Manuscript Classifications (Most matches displayed first)
- Board Membership (Board Members listed first)
- Average Review Rating (Highest Ratings listed first)
- Total Number of Completed Reviews (Highest number displayed first)

Assign Only Specific Editor Role Permissions

Editor Role Permission – Allow Assignment of Only Specific Editor Roles

Assign Only Specific Editor Role Permissions

- You may wish to allow your EiCs to be able to assign an Editor role to subordinate Editors but not to be able to assign other Editor roles with more permissions, such as Admin etc.
- You can restrict the Editor roles that can be assigned by an Editor in Role Manager.
- This helps the Admin as the Editor can assign a role to subordinates.



The screenshot displays a configuration interface for role assignments. It includes several settings:

- Default Login Role:** Author
- Default Login Menu:** Editorial Menu
- Available as a Reviewer?:** Yes (selected), No
- Board Member?:** Yes, No (selected)
- Forbidden as a Reviewer?:** Yes, No (selected)
- Reviewer Role *:** Reviewer
- Publisher Role *:** None
- Editorial Role *:** A dropdown menu is open, showing options: None (highlighted in blue), Associate Editor, and Activity Details.
- Editor Description:** A text input field.

Below these settings is a button labeled "Additional People Details".

The "Personal Information" section contains the following fields:

- Title:** Dr (with a note "(Mr., Mrs., Dr., etc.)")
- Given/First Name *:** W
- Middle Name:** (empty)
- Family/Last Name *:** Worm

Assign Only Specific Editor Role Permissions

- Configured in Role Manager, Editor Roles, Edit “Editor” or “Editor in Chief” role.
- Under Viewing and Editing People Data.
- Can select one or use ctrl + click to multi select more than one Editor role.

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
 - Editorial Assistant
 - Associate Editor
- Inactivate 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

Reviewer Discovery

Increase Your Reviewer Pool



Reviewer Discovery (RD)

- Journals need to find reviewers in a timely fashion.
- A journal's reviewer pool is often overburdened and journals can spend a lot of time searching outside of the reviewer pool.
- RD uses ProQuest, a well-curated database of biographic and bibliographic profiles on approximately 2.5 million scholars and researchers (including e-mail addresses).
- RD allows these profiles to be matched against the title and abstract of a submission, based on how closely the topics reflected in the title/ abstract correlate with the PQ scholar profiles.
- Increases and refreshes the journal's reviewer pool and also helps to find reviewers for more niche submissions.



Reviewer Selection Summary - Submission DEMO.2017.0007

Andy Author
Tea is Essential to Life!

Reviewer Search

Search My Publication Search for Reviewers from All Reviewers Go

Reviewer Discovery from **Pivot** ProQuest Community of Scholars

Reviewer Discovery

Reviewer Discovery - Manuscript Number DEMO.2017.0007
Andy Author
Tea is Essential to Life!

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

Change Search Type

Search My Publication Search for Reviewers ▾ from All Reviewers ▾

Reviewer Discovery from ▶ **PIVOT** ProQuest Community of Scholars

Reviewer Candidates

Select a checkbox by each person you wish to select as a Reviewer ([more...](#)).

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"/>	Information from Reviewer Discovery: Sarah Besky Department of Anthropology Division of Social Sciences Brown University sarah_besky@brown.edu	No	3 Reviewer Discovery Keyword(s) Found Public Administration Anthropology International Studies	View Researcher Profile and Publications	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from Reviewer Discovery: Hirofumi Tachibana Department of Bioresource and Bioenvironment School of Agriculture Graduate School of Bioresource and Bioenvironmental Sciences, Faculty of Agriculture, School of Agriculture Kyushu University tachibana@agr.kyushu-u.ac.jp	No	(Keywords unavailable)	View Researcher Profile and Publications	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from Reviewer Discovery: Kate A. Hammer School of Pathology and Laboratory Medicine	No	4 Reviewer Discovery Keyword(s) Found Natural Products Chemical Sciences	View Researcher Profile and Publications	

The resulting records are displayed in one of three ways:

- A Pivot Candidate.
- A Candidate that is a potential match in the publication.
- An unambiguously matched (Confirmed) publication user.
- Up to 100 results can be displayed.

Reviewer Discovery

Assign Reviewer Role

All Reviewer candidates must be assigned a Reviewer Role before being invited to review. Please assign a Reviewer Role to the people who do not yet have roles. You can also check 'Do not use this Person' if you decide not to invite them.

Name	Selected As	Reviewer Role	Do not use this Person
Hirofumi Tachibana	Invited	Reviewer ▾	<input type="checkbox"/>

Cancel

Assign Reviewer Roles

Select Reviewers - Confirm Selection and Customize Letters

Submission DEMO.2017.0007
Andy Author
"Tea is Essential to Life!"

You have selected the following people as potential Reviewers ([more...](#))

Reviewers to Invite

Name	Letter	Days to Review	Do Not Invite
Kate Hammer ▾ (Reviewer)	Reviewer Invitation ▾ Customize	0	<input type="checkbox"/>

Change Selections

Cancel

Confirm Selections and Proceed

Reviewer Discovery

- To enable the Reviewer Discovery feature, contact your Aries representative.
- Once this feature is enabled, the new “Reviewer Discovery from ProQuest Community of Scholars” search option is available for Editors with permission to Invite/Assign/Propose/select Alternate Reviewers (in Role Manager).

☐ Reviewer Invitations

- Invite Reviewers
- Un-Invite Reviewers
- Assign Reviewers
- Search Reviewers in Other Journals
- Override Reviewer Due Date
- Propose Reviewers
- Remove Proposed Reviewers
- Select Alternate Reviewers
- Promote Alternate Reviewers
- Link/Un-link Alternate Reviewers
- Remove Alternate Reviewers

Reviewer Discovery – Prevent Duplicates

Inv.	Asn.	Alt.	Prop.		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-mail Match Found in EM: <input type="checkbox"/> Use this Candidate Hasan Mukhtar (Reviewer) hmukhtar@wisc.edu	No
This Reviewer Discovery candidate has an email address that matches an existing EM user account. Please select the checkbox for the E-mail Match Found in EM to invite this candidate.					
People Notes: To show new RD Feature					
				Information from Reviewer Discovery: E-mail match found; please select person above Hasan Mukhtar Department of Environmental Health Sciences Basic Sciences School of Medicine Case Western Reserve University hmukhtar@wisc.edu	No

- In v14.0 an enhancement was added an option to the existing “Set Duplicate E-mail Policy” page in Policy Manager.
- This option helps to prevent Editors from registering a new user via the ProQuest tool if the user already has an account within the EM site.
- When enabled, if Editors attempt to select the Reviewer Discovery candidate (which proxy-registers the person with an email address that already exists in the system) if there is a matching email address in EM there will be a warning message which asks the Editor to select the existing EM-registered user instead.
- If there is more than one match all are shown and the Editor can choose which one to use.

Reviewer Discovery – Prevent Duplicates

Inv.	Asn.	Alt.	Prop.		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-mail Match Found in EM: <input type="checkbox"/> Use this Candidate Hasan Mukhtar (Reviewer) hmukhtar@wisc.edu	No
This Reviewer Discovery candidate has an email address that matches an existing EM user account. Please select the checkbox for the E-mail Match Found in EM to invite this candidate.					
People Notes: To show new RD Feature					
				Information from Reviewer Discovery: E-mail match found; please select person above Hasan Mukhtar Department of Environmental Health Sciences Basic Sciences School of Medicine Case Western Reserve University hmukhtar@wisc.edu	No

- If the user selects the possible EM match, (s)he proceeds through customising the letter, amending the due dates etc. in the usual way.
- If the user selects the Reviewer Discovery Candidate that person is proxy-registered behind the scenes.
- Also cosmetic/visual enhancements to simplify and improve user experience.
- The reviewer candidate that is already registered in EM is now shown above the RD option to help encourage use of the current EM option.
- The department (if available) and email address of the EM match are displayed as if they are not shown it may give the Editor the false impression that the data is missing from the user record which may prompt them to choose to use the RD entry.

Reviewer Discovery – Configuration

Prevent Duplicate E-mail Addresses for Reviewer Discovery

When a Reviewer Discovery candidate is returned from the Pivot ProQuest Community of Scholars database, the system checks to see if the ProQuest e-mail address already exists in the EM database. If a matching e-mail address is found in EM, both the ProQuest record and the EM record are displayed for the Editor, and s/he can choose which person to use. If the Editor selects the ProQuest record, the person is proxy-registered in EM and a people record with a duplicate email address is created. This setting allows you to determine whether Editors are allowed to select and use a Reviewer Discovery candidate that may already exist in EM, thereby creating a duplicate account with the same e-mail address.

Select 'Yes' to prevent the Editor from selecting and proxy-registering a person that may already exist in EM on the Reviewer Discovery Results page.

Yes No



- In Policy Manager, Registration Policies, **Set Duplicate E-mail Address Policy.**
- Select **“Yes”** under **Prevent Duplicate E-mail Addresses for Reviewer Discovery.**
- If **“No”** is selected current behaviour is retained.

Duplicate Submission Check


Am I Seeing Double?

Am I Seeing Double?

Duplicate Submission Check

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Details Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Send E-mail Linked Submissions Search Publons	DEMO.2017.0011	RapidTestNo		Duplicate submission	W Worm 	Dec 08, 2017	Dec 08, 2017	Manuscript Submitted
View Submission Duplicate Submission Check (..) Details Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Send E-mail Linked Submissions Search Publons	DEMO.2017.0010	Original Study		Tea is Essential to Life!	W Worm 	Dec 08, 2017	Dec 08, 2017	Manuscript Submitted

Helps publications easily identify duplicate submissions where either an author has submitted more than one paper by mistake or a co-author has also submitted the same paper:

- A green D symbol  shows if the author of a submission has submitted another paper within the previous X days (X is configurable).

Duplicate Submission Check

- Enhanced Duplicate Submission Checking calculates a score as %:
 - Article Title Similarity – 40% of the total score
 - Author Similarity – 30% of the total score
 - Abstract Similarity – 30% of the total score
- Also a 'Duplicate Submission Check Results' link will be displayed to users with permission. Clicking the link will display a list of similar submissions.

New Submissions - mary mary, phd

Contents: These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort order.

Page: 1 of 1 (3 total submissions) Display 10 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
Action Links (0%)	DEOMDG-81-38	Original Study		EMUG	Arthur Author	Jun 08, 2015	Jun 08, 2015	Manuscript Submitted
Action Links (50%)	DEOMDG-81-21	Original Study		EMUG demo1	Arthur Author	Dec 17, 2012	Dec 17, 2012	Manuscript Submitted
Action Links	DEOMDG-81-20	Review		Custom Submission Question Enhancements v9.2	Arthur Author	Aug 21, 2012	Aug 21, 2012	Manuscript Submitted

Potential Duplicate Submissions

EM Duplicate Score: 50%

Manuscript/ Submission Number	Initial Date Submitted	Revision	Current Status	Article Title	Authors	Article Title Similarity	Author Similarity	Abstract Similarity
DEOMDG-81-38 View Submission Details	06/08/2015 13:07:52	0	Manuscript Submitted	EMUG	Arthur Author	50%	100%	0%

Duplicate Submission Check – Configuration 1

Configure Duplicate Submission Check

- If the Author has submitted a new manuscript within the number of days set below, a **D** symbol will appear next to the Author's name in the Editor folders New Submissions, New Submissions Requiring Assignment, Direct-to-Editor New Submissions and New Assignments. The Editor can then click the Author's name to see information about prior submissions.
- If a manuscript with a similar title, list of authors, or abstract has been previously submitted, a 'Duplicate Submission Check Results' link will be displayed to users with permission. Clicking the link will display a list of similar submissions.
 - You may select a minimum score used to select which potential duplicate submissions are displayed on the 'Duplicate Submission Check Results' page.
 - You may highlight scores that exceed a configured threshold.
 - An overall 'EM Duplicate Score' will be calculated, based on a weighted average of the Article Title (40%), the list of Authors (30%), and the Abstract (30%)

Alert me when:

- The same Corresponding Author has submitted a paper in the past days
- A similar paper has been previously submitted.
 - Only display potential duplicate submissions that have an EM Duplicate Score that is % or more
 - Highlight the EM Duplicate Score when it is % or more

- In Policy Manager, Submission Policies, **Configure Duplicate Submission Check.**

- In Policy Manager, **Submission Policies, Edit Article Types.**

Similarity Check:

- Send Reviewer PDF on Initial Submission
- Send Reviewer PDF on First Revision
- Send Reviewer PDF on Final Disposition to Accept

You must also set up Automatic Transfer to a checking service on the Configure Similarity Check page. Editor and Publisher Roles can be configured to send files by Automatic Transfer from the File Inventory or Technical Check pages even if you do not enable the options on this page.

Duplicate Submission Check:

- Check for duplicate submissions to Editorial Manager

You must also enable the check for duplicate submissions on the Configure Duplicate Submission Check page.

Bibliometric Intelligence Analysis:

- Send Author/Editor PDF when Transfer Complete link is checked
- Send Author/Editor PDF when New Submission Received
- Send Author/Editor PDF on Tech Check Complete
- Send Author/Editor PDF at First Editor Assignment

Select one or more trigger points to automatically send the Author/Editor PDF to the Bibliometric Intelligence analysis tool. Editor roles can be configured to send the PDF from the Technical Check page even if you do not enable the options on this page. Editor and Publisher Roles can be configured to send the PDF from the File Inventory page even if you do not enable the options on this page.

OR

- Send Author/Editor PDF at First Revision

Duplicate Submission Check – Configuration 2

General Searching and Viewing

Use Editorial Details Layout

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

Search Author Publications in MEDLINE

Initiate Similarity Check

View Similarity Check Results

View Duplicate Submission Check Results

Initiate checkCIF

View checkCIF Results

Initiate Bibliometric Intelligence Analysis

- In Role Manager, General Searching and Viewing, **View Duplicate Submission Check Results.**

Flags

Visual Reminders

Flags

View Submission Duplicate Submission Check (4) Details ▾ Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications	DEMO.2017.0010	Original Study	Tea is Essential to Life!	W Worm 🟢 ▾ 😊
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People Flag

Details for Manuscript Number: DEMO.2017.0010

[Abstract](#)
[Manuscript Notes](#)
[Production Notes](#)
[Editors](#)
[Reviewers](#)
[Alternate Reviewers](#)

Additional Manuscript Details: [Add/Edit Additional Manuscript Details](#)

Corresponding Author: ✉ W Worm ▾ 😊
UNITED STATES [Proxy]


Action ▲	Manuscript Number ▲▼
View Submission Details ▾ ▲ S Initiate Discussion History File Inventory Special Issue paper Edit Submission Classifications Invite Reviewers ▶ Solicit Commentary Set Final Disposition Initiate Production Search Publons Submit Editor's Decision and Comments Send E-mail Linked Submissions	DEMO.2017.0007

Submission Flag

- There are two main types of flags that are useful for Editors:
 - ❖ People Flags
 - ❖ Submission Flags
- Only visible to those users with permission.
- Can be set to be shown in the History.
- Hovering over the flag tells you what that flag means.
- You can also search on flags.

Flags – Configuration 1

Create Customized Submission Flags

Submission Flags can be attached to submission records on the Submission Flags page (accessible from the 'Details' page), or by clicking on the flag icon on any page where Submission Flags are displayed. Users with permission to 'Turn On Submission Flags' can also set flags by clicking the 'Set Flag' icon . When a flag is displayed for a submission, it is visible to Editors and Publishers (with appropriate RoleManager permission) on all pages where the 'Details' action link is displayed. For sites using Production Tracking, Submission Flags are also displayed next to the 'Production Details' action link. The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both. If a flag is associated with a specific Additional Manuscript Details (AMD) field, the option to attach or remove the flag displays next to the associated AMD field.

[Add](#)

Order	Flag	Flag Name	Flag Type	Associated With AMD
1		Missing Copyright Transfer Information	Editorial and Production	Remove Edit
2		Manuscript needs grammatical work. Initiate collaboration on this with Author.	Editorial and Production	Remove Edit
3		Time-Sensitive Findings Reported-- Shorten Review Turnaround	Editorial and Production	Remove Edit
4		Open Access submission	Editorial and Production	Remove Edit
5		Invited Submission	Editorial and Production	Remove Edit
6		Special Issue paper	Editorial	Special Issue paper? Remove Edit

[Update Item Order](#)

[Add](#)


[Back to PolicyManager](#)

- In Policy Manager, General Policies, Create Customized Submission Flags.
- In Policy Manager, General Policies, Create Customized People Flags.
- You can Add, Edit or Remove Flags.

Add Customized Submission Flag

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

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On Submission Flags' and 'Turn Off Submission Flags' can display/turn off Submission Flags for any manuscript on the Submission Flags page (accessible from the Details page). The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both. If you associate this Flag with an Additional Manuscript Details (AMD) field, these Editors and Publishers can also display/turn off this Flag on pages containing that AMD field. When a flag is attached to a submission, it will be displayed next to the 'Details' action link on all pages where the 'Details' link is displayed (Editor and Publisher Roles must have permission to 'View Submission Flags').


Flag Icon:  [Open Special Character Palette](#)

Flag Name: Maximum 256 characters

Flag Type: Editorial Production

Associate with AMD Field:




Display in History When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.



- Choose an unused flag icon.
- Name your Flag.
- Editorial or Production?
- AMD Field?
- Display in History?

Flags – Configuration 2

☰ **Flag Icons**

- View Submission Flags
- Turn On Submission Flags
- Turn Off Submission Flags
- View Submission Flag History
- View People Flags
- Turn On People Flags
- Turn Off People Flags
-  View Schedule Group Flags
-  Turn On Schedule Group Flags
-  Turn Off Schedule Group Flags



- In Role Manager, Editor or Publisher role, Edit Role, **Flag Icons**.
- Can be set up so different Editor and Publisher Roles have different permissions, for example, the Associate Editor could be set up to View Flags only and the Editor in Chief or Admin could be set up to View Flags, Turn Flags on or off and see Flags in the history.

Flags - Associate Flags with Submission Questions (new in v14.1)

- Allows Submission Flags to be associated with Custom Submission Question responses and automatically turned on when a Corresponding Author enters a specific response to a question.

Page: 1 of 1 (1 total submissions) 1

Contents: These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort c

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Duplicate Submission Check Details  S Initiate Discussion History Special Issue Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Send E-mail Linked Submissions Search PUBLONS	DEMO.2018.0005	Original Study	Basic Science Section	Drinking Tea Makes You Happy!	Amy Author 	Jun 11, 2018	Jun 11, 2018	Manuscript Submitted

Flags - Associate Flags with Submission Questions (new in v14.1)

Configuration 1

1. Create your flags in Policy Manager, General Policies, Create Customized Submission Flags.
2. Next create/edit the Custom Question in Policy Manager, Questionnaire Policies, Create Custom Questions.
3. Click “Associate with Flag” to select the Flag for that answer.

Flag Icon: S

Original Flag Icon: S

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

Flag Type: Editorial Production

Associate with AMD Field:

Associated with Custom Question? No

Display in History When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.

Hide When you Hide a flag, the flag cannot be turned on for new submissions, but will continue to display on existing submissions (until it is turned off by a user with appropriate permission).

Turn off flag throughout the system When you turn off a flag throughout the system, the flag will be removed from all submissions to which it was attached.

! ! ! ! ! ! ! ! # # # # # # # # \$ \$ \$ \$ \$ \$ \$ \$ % % % % % % % % & & & & & & & * * * * * * * *

Question text:

Instructions for Author Response:

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: **List Type:**

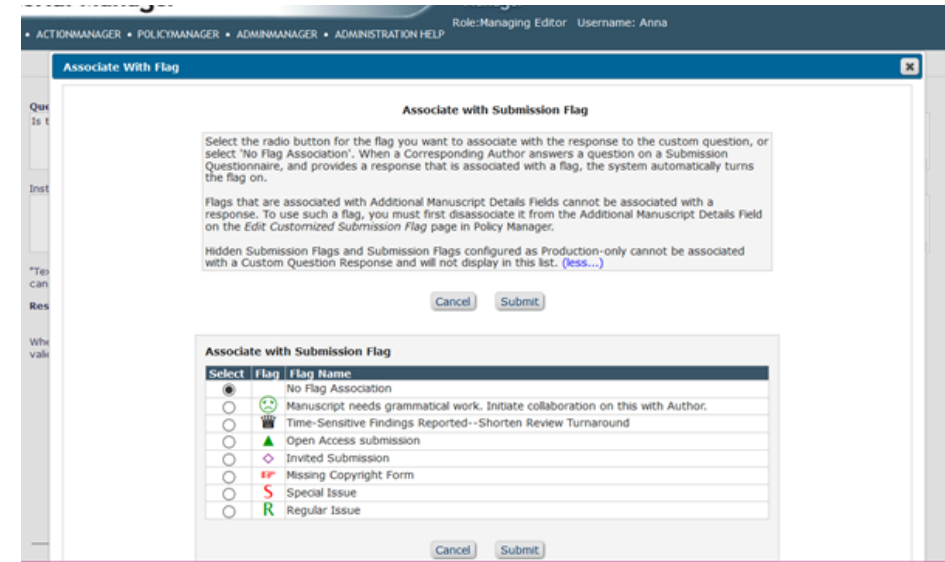
When configuring the default value, please note that only the value "Please select a response" will force the author to select another answer. Any other value will count as a valid response.

Display Order	Default Value	Value	Description	Flag
	<input checked="" type="radio"/>	Please select a response		Associate with Flag
<input type="text" value="1"/>	<input type="radio"/>	Yes		Associate with Flag Remove Edit
<input type="text" value="2"/>	<input type="radio"/>	No		Associate with Flag Remove Edit
<input type="text" value="3"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>	Save Item

Flags - Associate Flags with Submission Questions (new in v14.1)

Configuration 2

4. Select the flag you want for that answer.
5. If you want a flag for the other answer(s), add those too.
6. Save your settings (“Save and Close” or “Save and Add Another Question”).



Question text:
Is this a Special Issue Paper?

Instructions for Author Response:

Text and *Notes* responses can contain any mix of characters and numbers. A *Date* response must be entered in a mm/dd/yyyy format. *Integer* and *Decimal* responses can contain only a number or decimal point. A *List* response type requires the Author to select from the predefined response values.

Response Type: List List Type: Drop-down list (Allows for a null or single value selection)

When configuring the default value, please note that only the value "Please select a response" will force the author to select another answer. Any other value will count as a valid response.

Display Order	Default Value	Value	Description	Flag
	<input checked="" type="radio"/>	Please select a response		Associate with Flag
1	<input type="radio"/>	Yes		S Remove Flag Remove Edit
2	<input type="radio"/>	No		R Remove Flag Remove Edit
3	<input type="radio"/>			

Buttons: Update Save Item

Flags - Associate Flags with Submission Questions (new in v14.1)





Configuration 3

7. On the Create Custom Question page you will now see the questions and their associated flags.
8. If you added a new question, add this to the desired questionnaire.

Create Custom Questions

Listed below are the customized questions which may be displayed as part of a Questionnaire. Each question may also be configured to display in additional locations (e.g. PDF Cover Page, Manuscript Details, and Transmittal Form). [\(more...\)](#)

[Add Question](#) Filter By
All ▾

Actions	Description ▲▼	Custom Metadata IDs ▲▼	Associated With Flags	Questionnaires
Edit Copy Hide	Please confirm you have approval from all Co-authors to submit this manuscript?			Author Questionnaire Sample Questionnaire
Edit Copy Hide	If you have submitted this manuscript to another publication please give details below			Sample Questionnaire
Edit Copy Hide	Please enter the date you submitted the paper to another publication.			Sample Questionnaire
Edit Copy Hide	Please enter the Word Count of your manuscript			Sample Questionnaire
Edit Copy Hide	Are you a member of the TLS (Tea Lovers Society)?		 TLS Member  Not TLS Member	Sample Questionnaire
Edit Copy Hide Remove	Is this a Special Issue Paper?		 Special Issue  Regular Issue	

Questions?