Welcome to the 16TH Annual EMUG BOSTON

#EMUG2018

em Editorial Manager® pm ProduXion Manager®

Underused Features

Betsy Hopkins
Senior Project Manager
bhopkins@ariessys.com

16th Annual Editorial Manager User Group Meeting

Aries systems

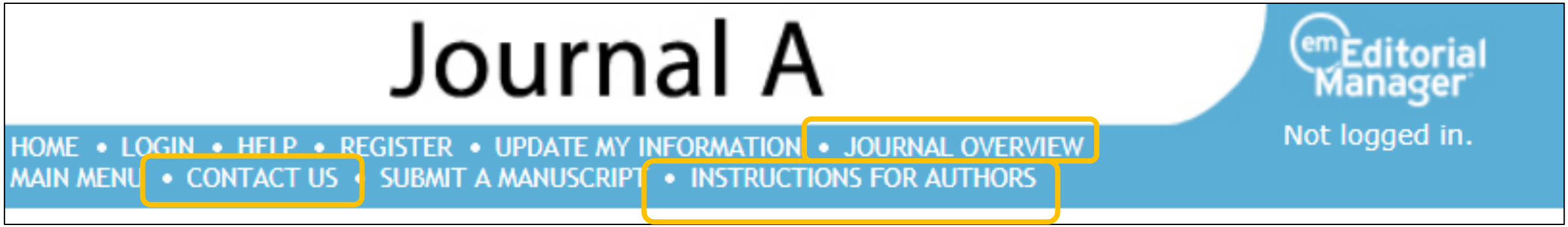
Agenda

- Administrative Features
- Submission Features
- Editorial Features
- Flags!
- A Few More

Administrative Features

Update Banner Links

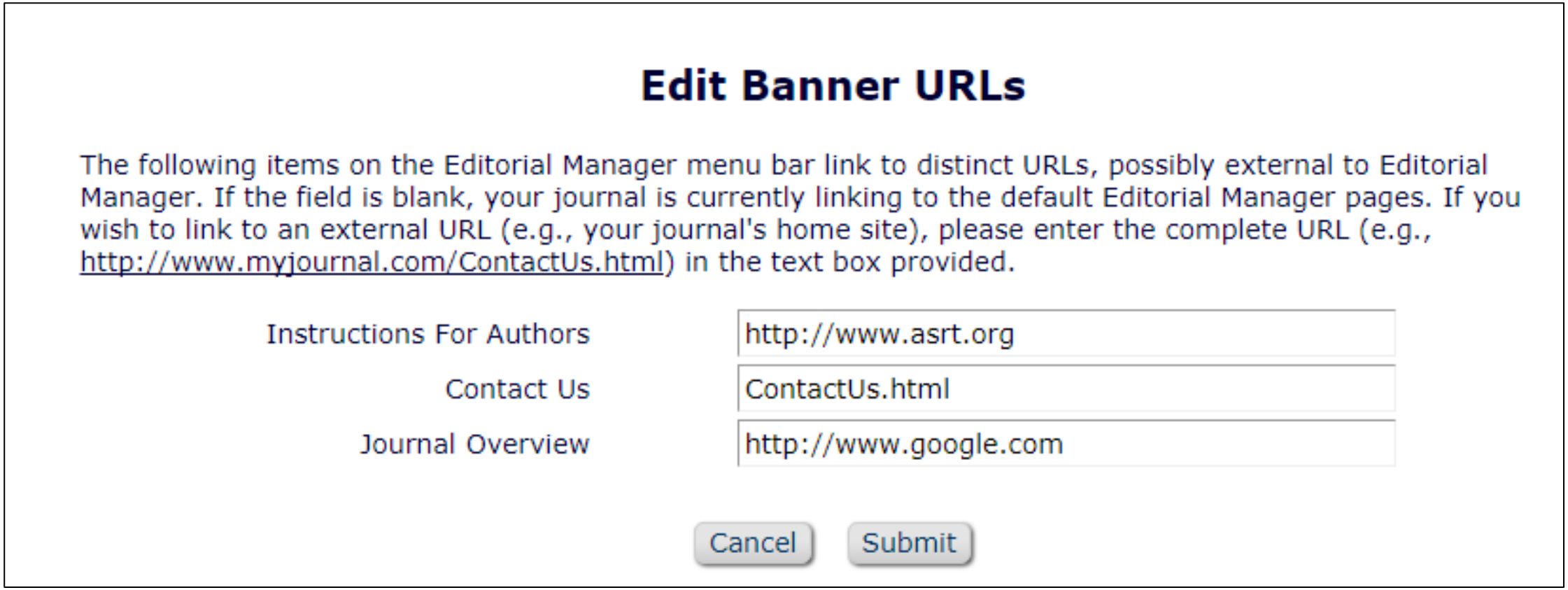
- Check your links regularly!



Update these links here:

PolicyManager → Edit Banner URLs

Update Banner Links



Edit Banner URLs

The following items on the Editorial Manager menu bar link to distinct URLs, possibly external to Editorial Manager. If the field is blank, your journal is currently linking to the default Editorial Manager pages. If you wish to link to an external URL (e.g., your journal's home site), please enter the complete URL (e.g., http://www.myjournal.com/ContactUs.html) in the text box provided.

Instructions For Authors	http://www.asrt.org
Contact Us	ContactUs.html
Journal Overview	http://www.google.com

Cancel Submit

Update Main Pages

- Check your links regularly!
- Update instructions
- Review the information

- Contact your Account Coordinator for assistance

Update Your Letters!

- Recent security updates in Editorial Manager changed the %PASSWORD% merge field functionality
- Check the wording on your letters for accuracy

Ref.: Ms. No. EMDEMO-D-17-00014
Demonstration of Passwords
EM Demo Site

Dear Ms. Author,

You have been invited to review the above referenced submission.

https://editorialmanager.com/emdemo
username: Name
password: Password

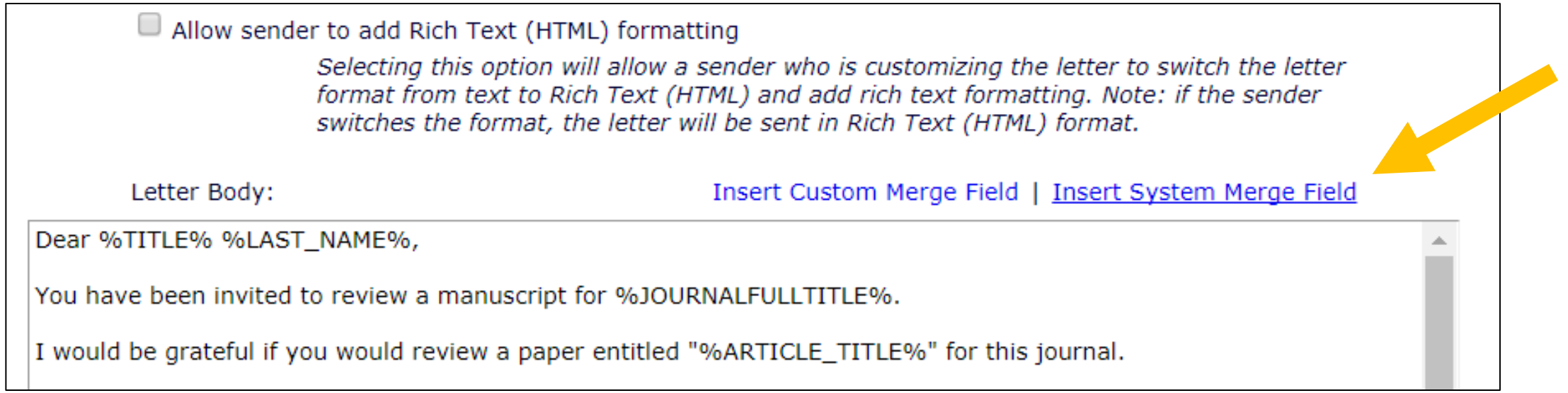
Ref.: Ms. No. EMDEMO-D-17-00014
Demonstration of Passwords
EM Demo Site

Dear Ms. Author,

You have been invited to review the above referenced submission.

https://editorialmanager.com/emdemo
username: Name
password: available at this link

Update Your Letters!

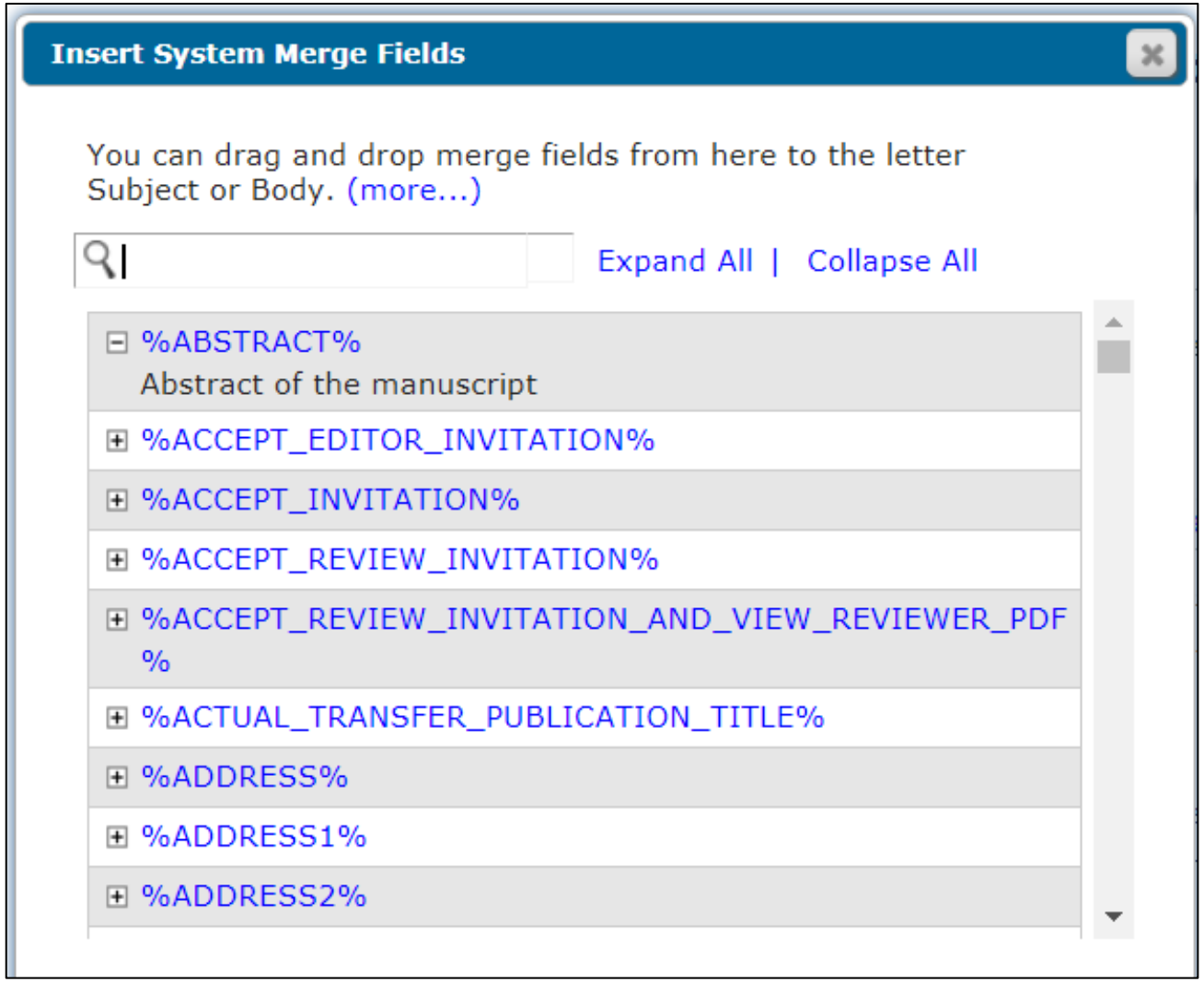


Update letters here:

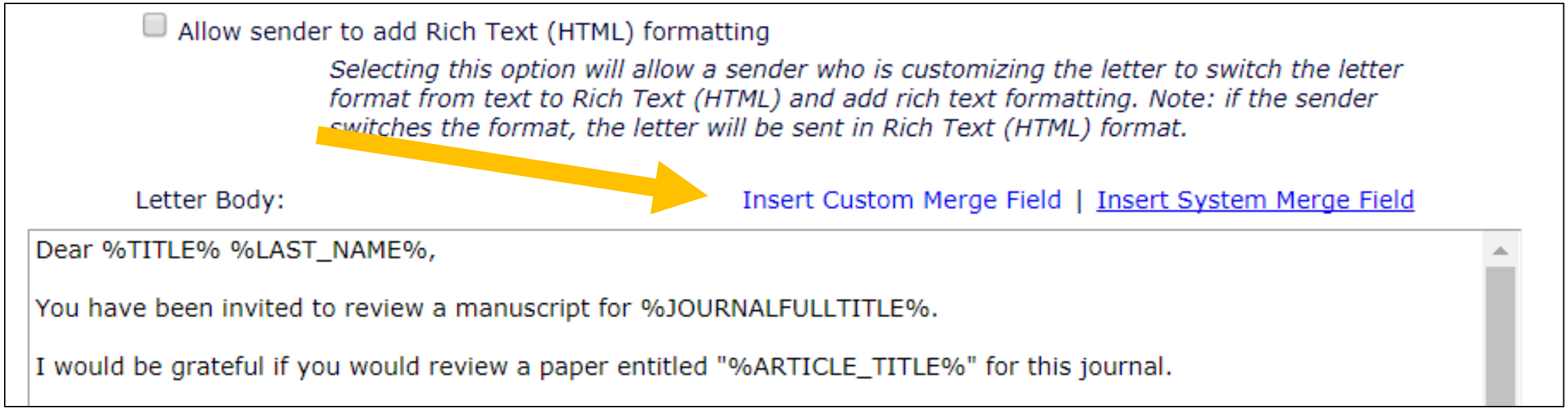
PolicyManager → E-mail and Letter Policies → Edit Letters→ Select the letter

Update Merge Fields

- Search
- View description

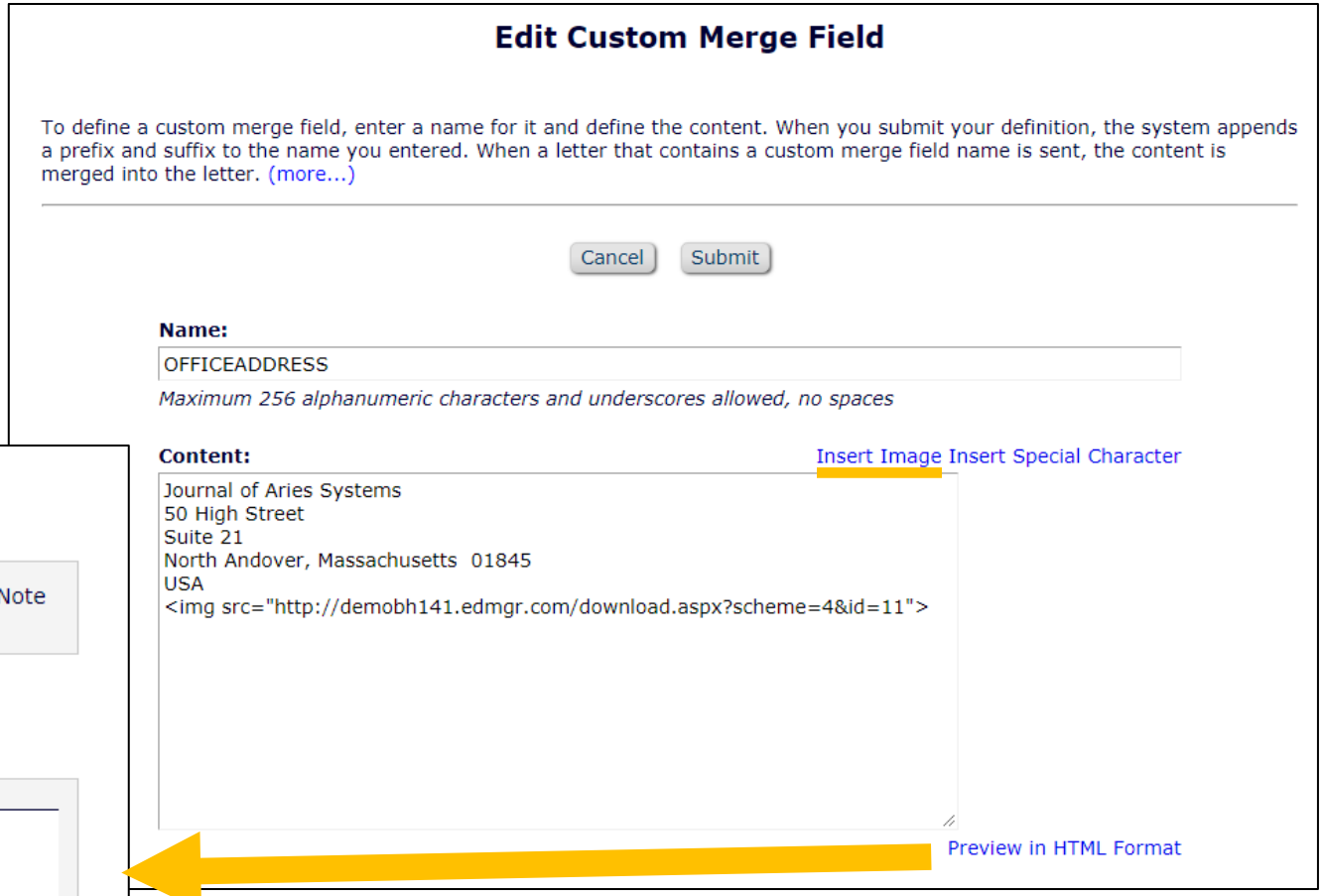


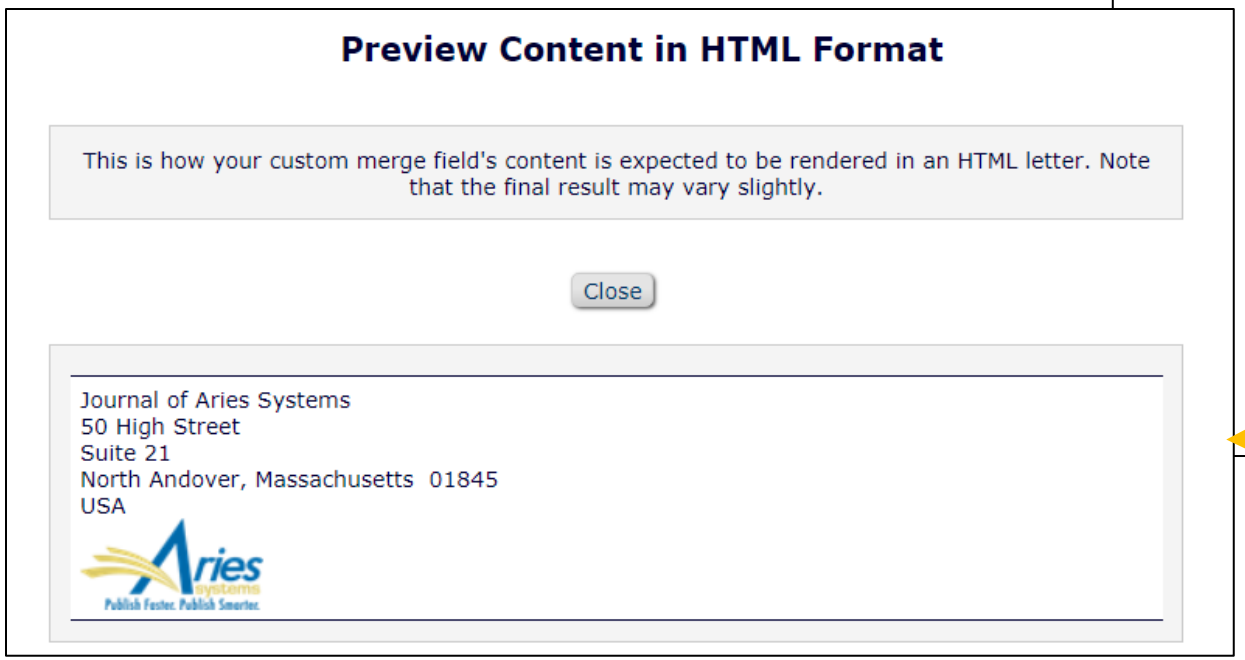
Custom Merge Fields



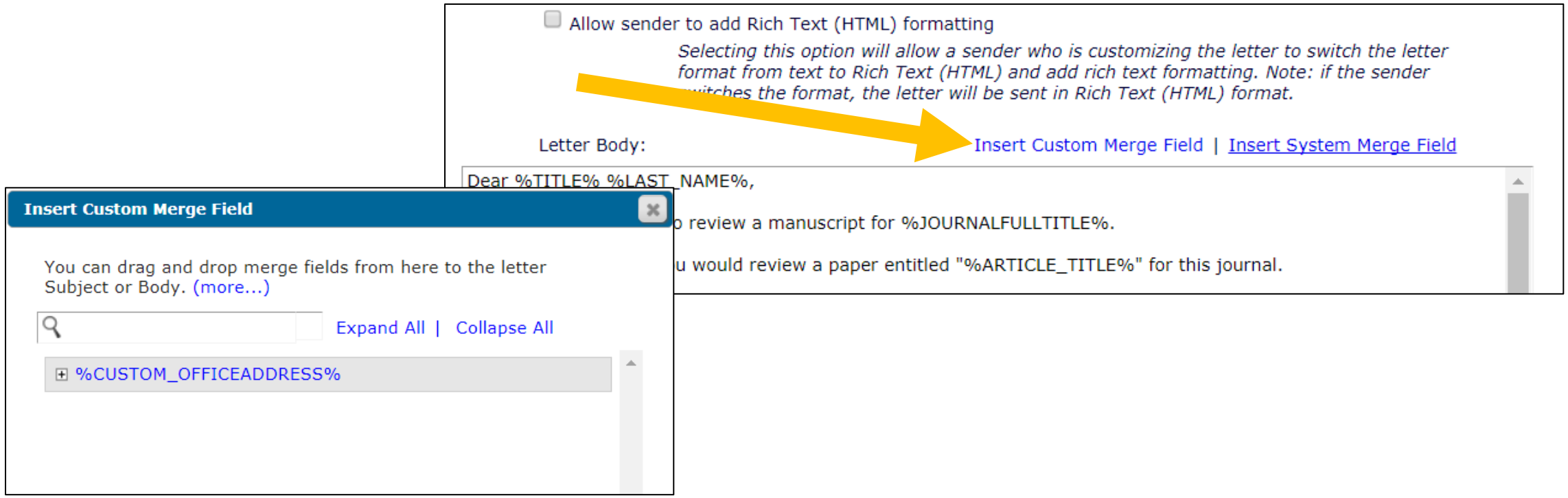
Custom Merge Fields

- Use Custom Merge Fields for frequently updated information
- Add Images that display in HTML letters





Custom Merge Fields

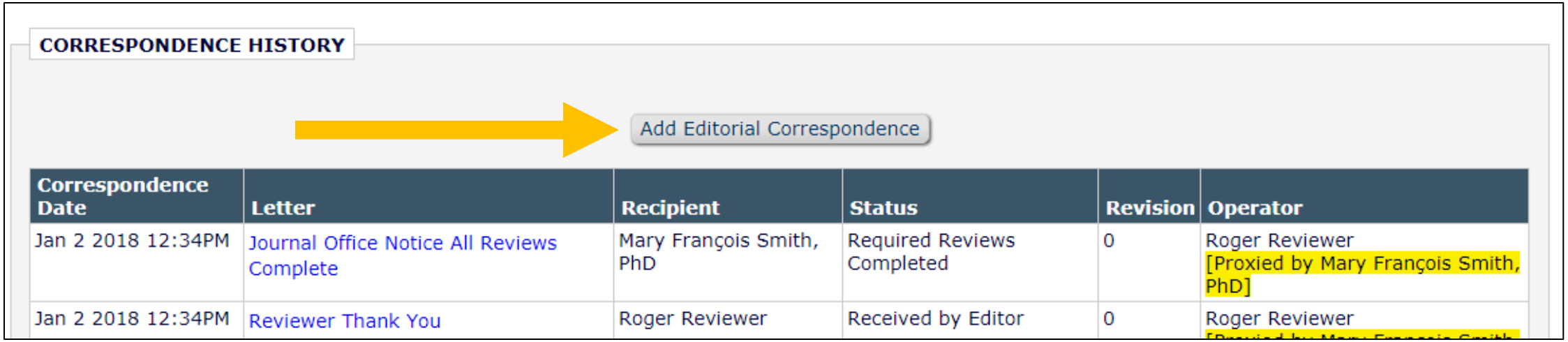


Create Custom Merge Fields here:

PolicyManager → E-mail and Letter Policies → Define Custom Merge Fields

Add External Correspondence

- Add external correspondence to History
- Can be a record of a phone call



Add External Editorial Correspondence

Items marked with an asterisk are required. The 'Correspondence Date' and 'Description' fields will be listed on the History page.Paste or type any desired text into the 'Letter Body' area, but note that any formatting will be lost. Click 'Open in New Window' if you need extra space to edit the correspondence.

Note: Please check the text for any sensitive information that should be removed or obscured (such as passwords or names of reviewers), as the system cannot automatically anonymize correspondence you add manually. Correspondence where you enable the 'Display in Author's Correspondence History' checkbox can be viewed by the author if your publication allows this.

Cancel Submit

☐ **Display In Author's Correspondence History**

* Correspondence Date 01/08/2018 (mm/dd/yyyy) Time Hour 05 Minute 12 AM/PM PM U.S. Eastern Time

* Description: Letter regarding EEMUG Prep

From: Aries Marketing

To: B. Hopkins

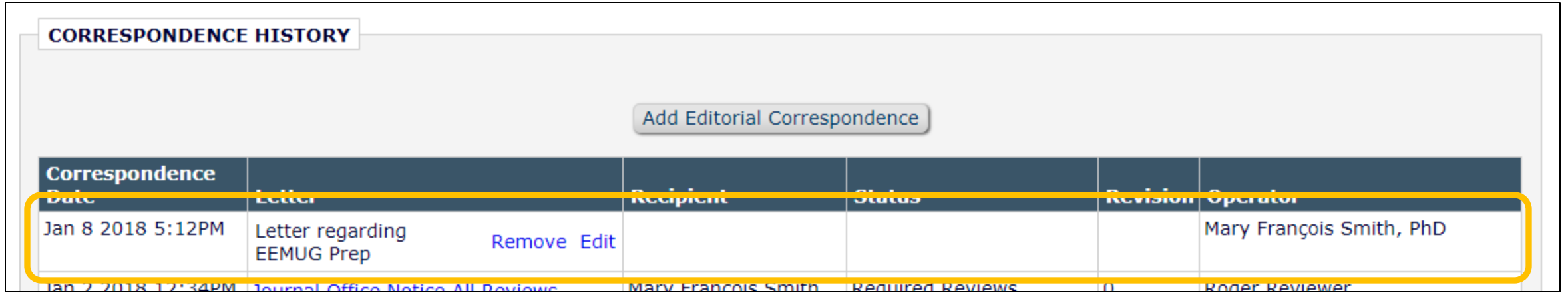
Letter Subject: Are you ready for EEMUG?

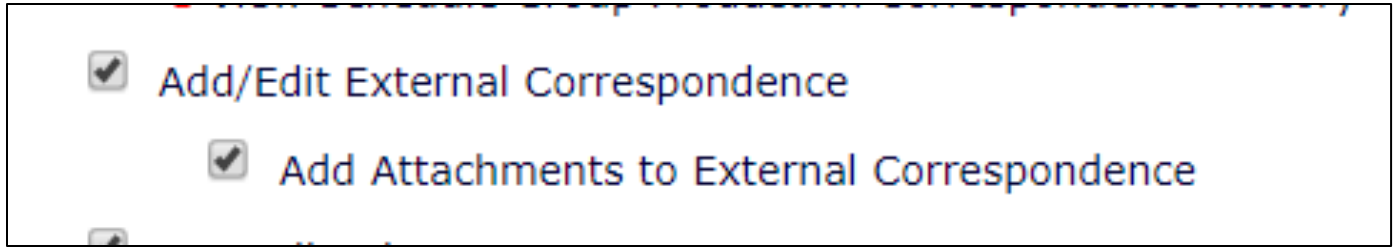
Attachments: Add/Change Attachments

Letter Contents: Open in New Window

Styles Format Font Size

Add External Correspondence





Configure permission:

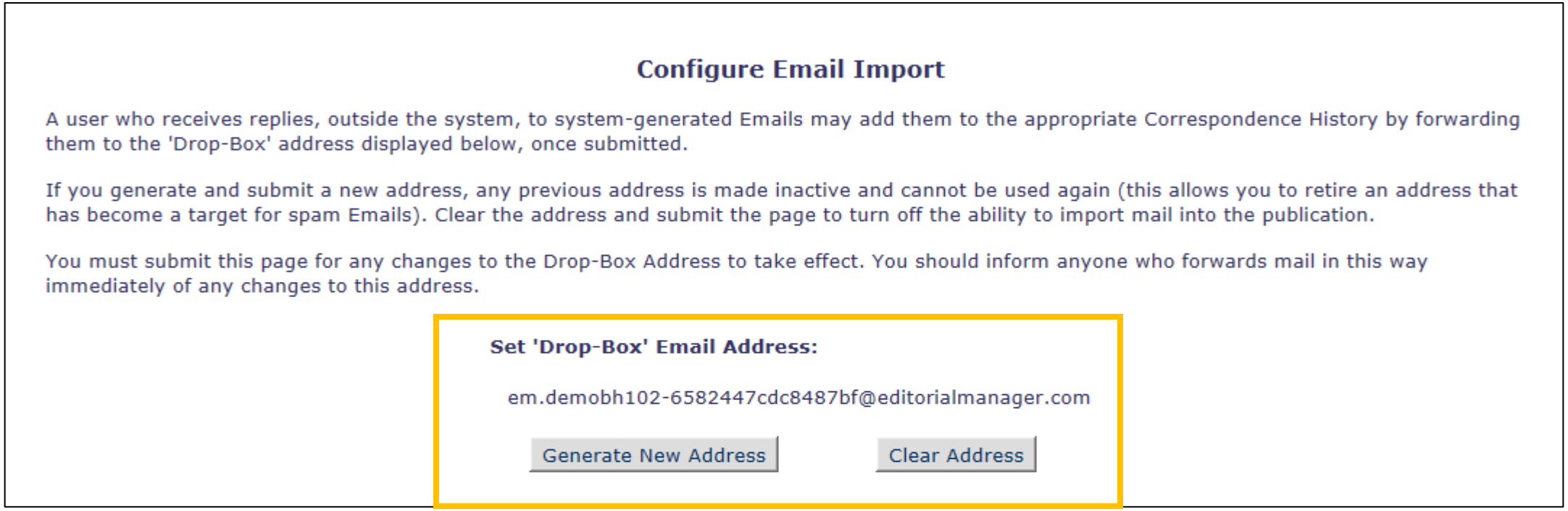
RoleManager → Select Editor Role→ General Searching and Viewing

Create an E-mail Drop Box

- Creates an e-mail address for use by Editors
  - Be selective who gets this address
- When configured, correspondence sent from EM (related to a submission) will have an EMID
- WHAT IS AN EMID?
  - Used to link external e-mail to EM submission
  - Must have EMID in subject line to be properly ingested

You have a new Editor Assignment - [EMID:47b90ea3ee0ca4f5]

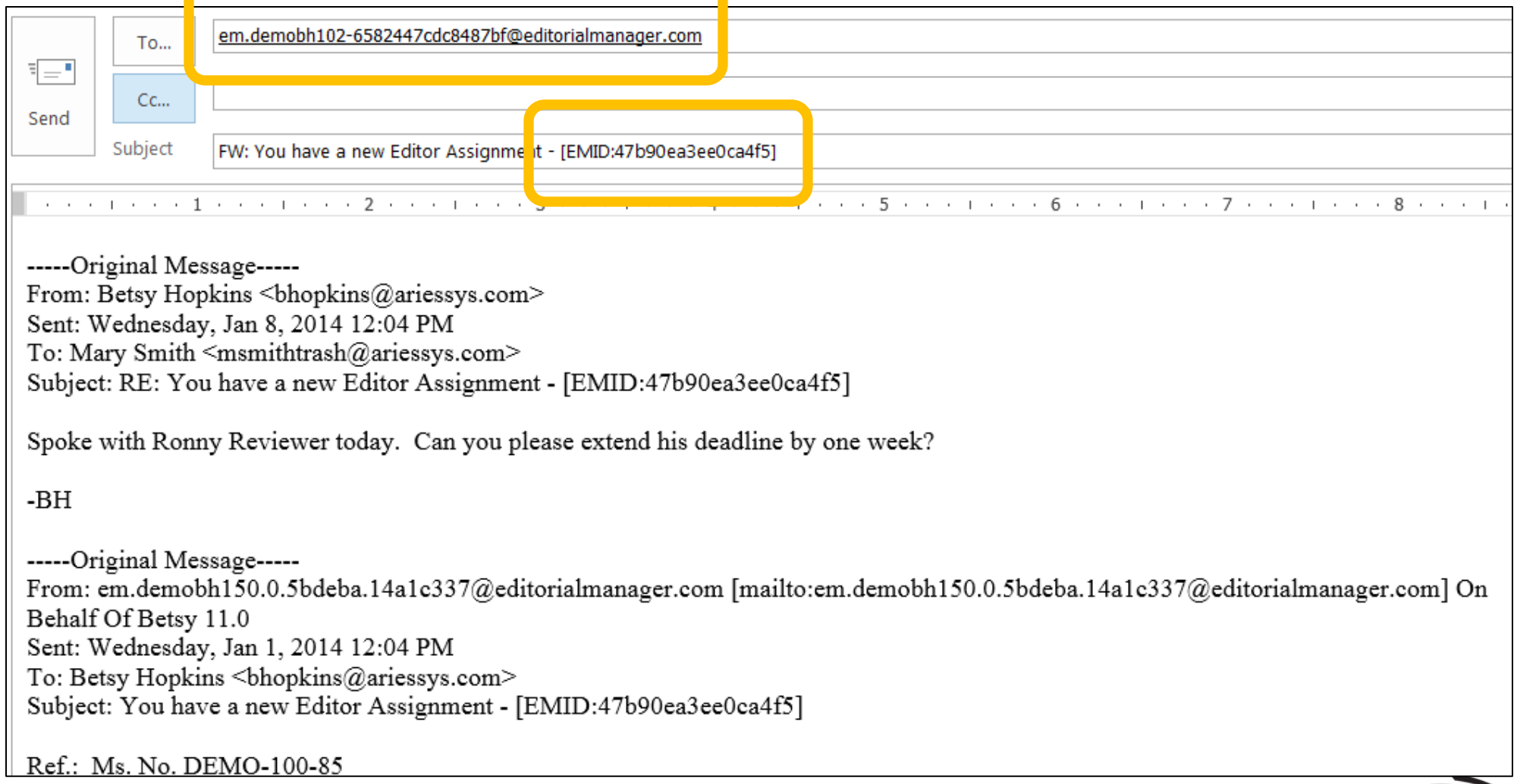
Create an E-mail Drop Box



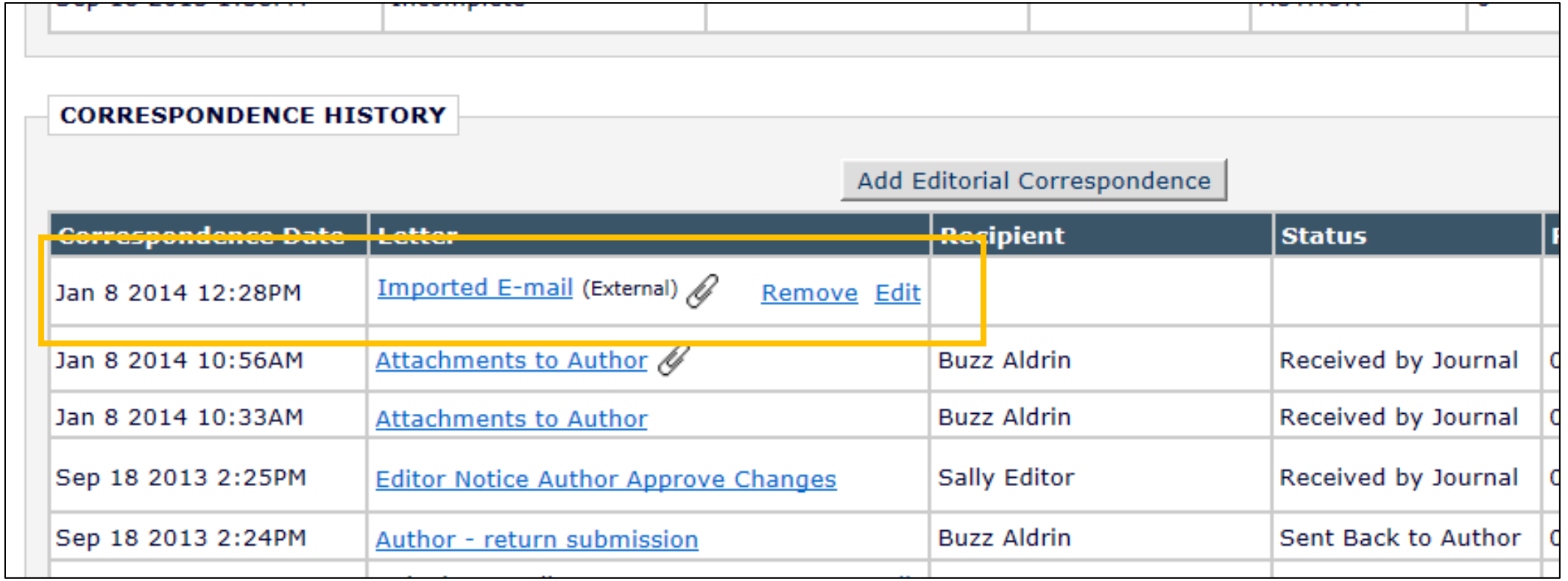
Configure Drop Box Address here:

PolicyManager → E-mail and Letter Policies → Configure Email Import

Create an E-mail Drop Box



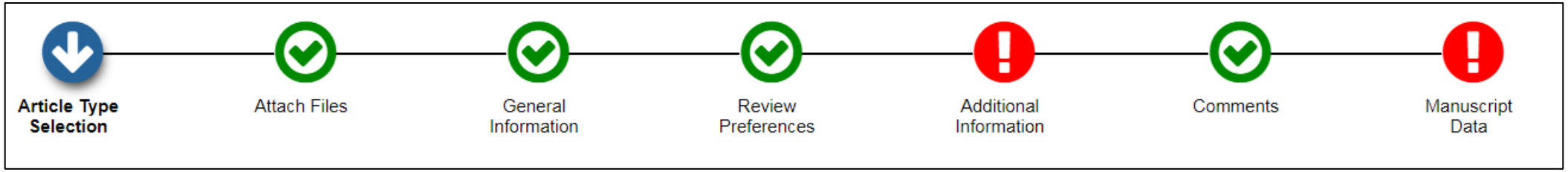
Create an E-mail Drop Box



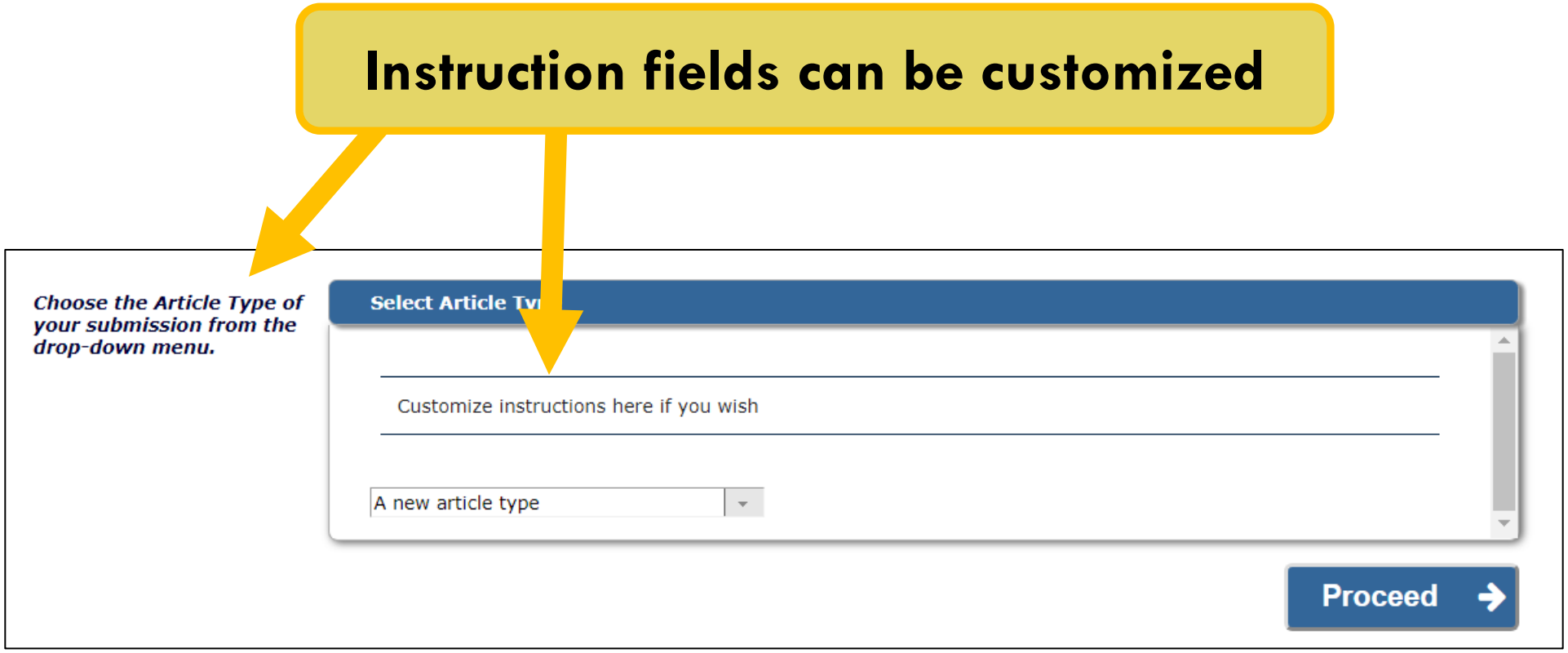
Submission Features

Update Submission Instructions

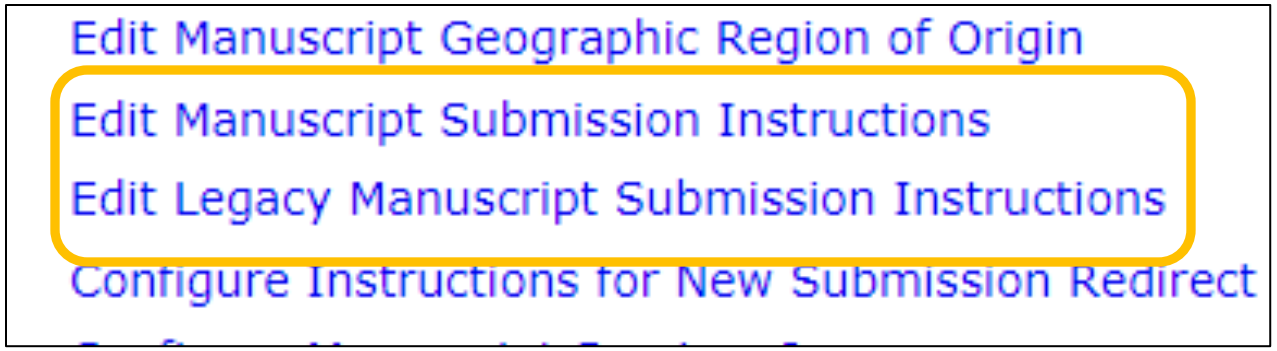
- New Submission Interface available in version 14.1
- New Submission Interface will be turned on for everybody with 15.0 upgrade
- Update your Submission Instructions now!



Update Submission Instructions



Update Submission Instructions



Configure New Instructions:

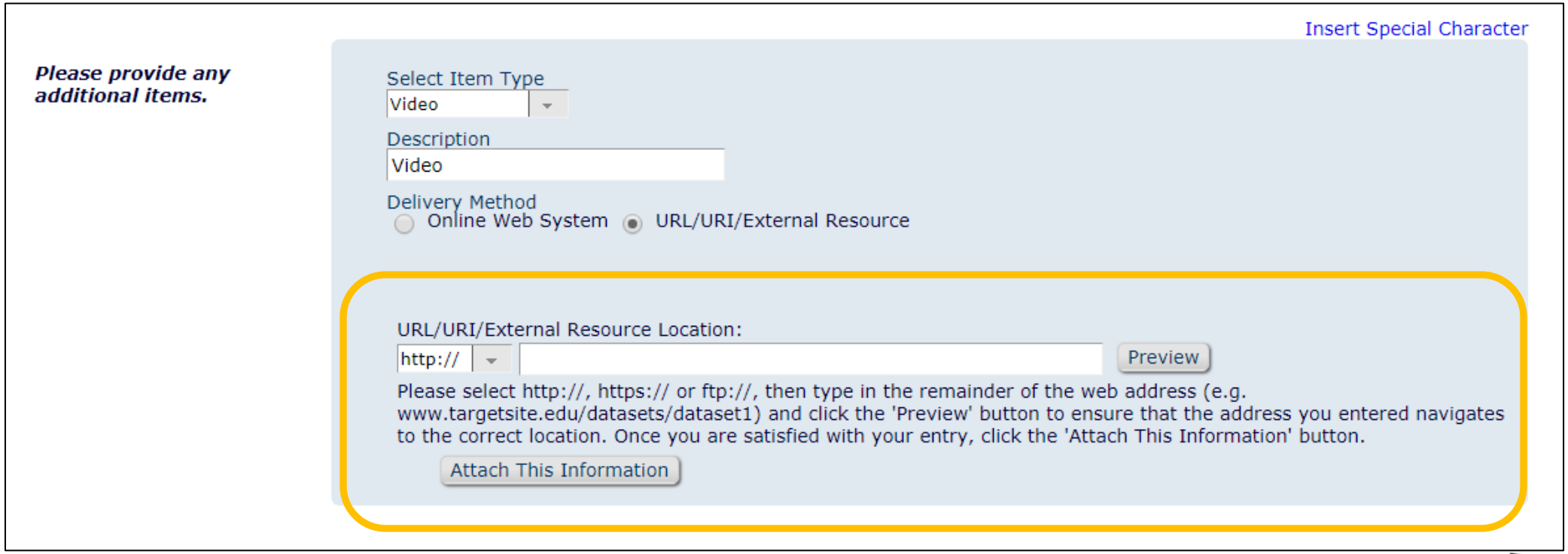
PolicyManager → Submission Policies → Edit Manuscript Submission Instructions

Review Old Instructions:

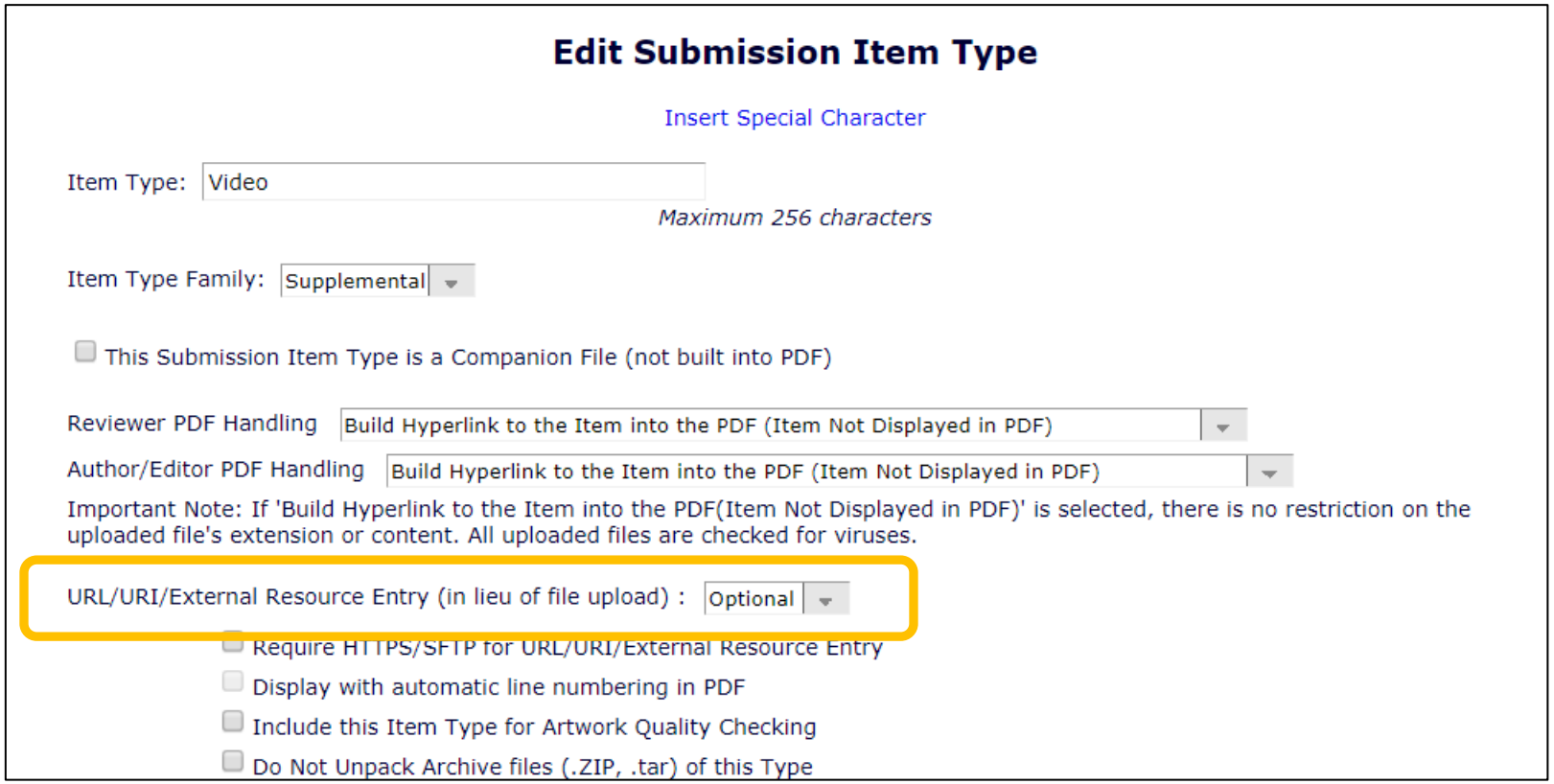
PolicyManager → Submission Policies → Edit Legacy Manuscript Submission Instructions

External File Type

- Think about the URL feature for larger file sets
- Set to Optional or Required



External File Type



Configure here:

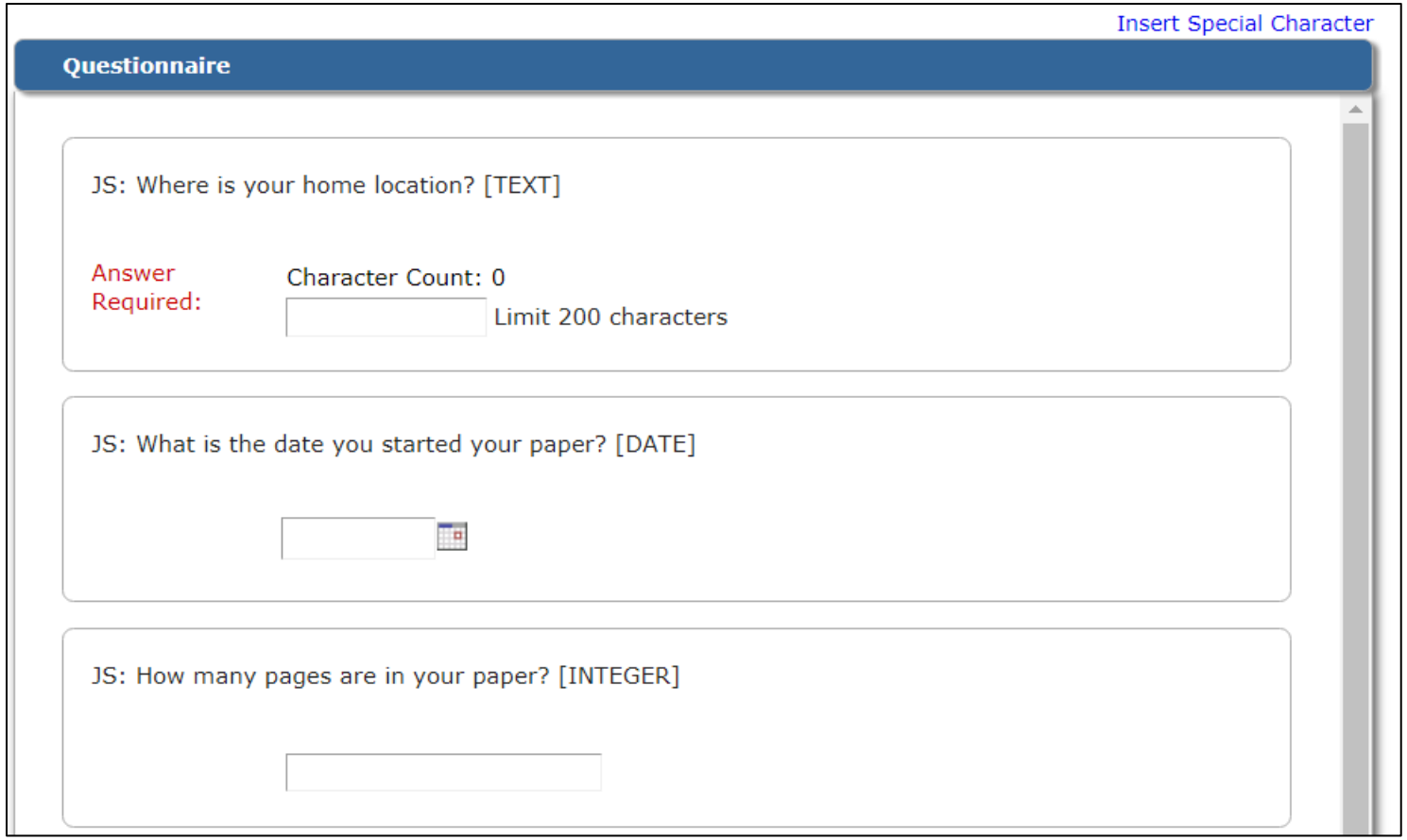
PolicyManager → Submission Policies → Edit Submission Items

Author and Submission Questionnaires

- Submission Questionnaire:
  - Displayed only to Author when submitting manuscript
- Author Questionnaire:
  - Displayed to Author when submitting manuscript
  - Also displayed to Co-Authors when using Co-Author Verification
- Gather information from Authors that can be used for reporting

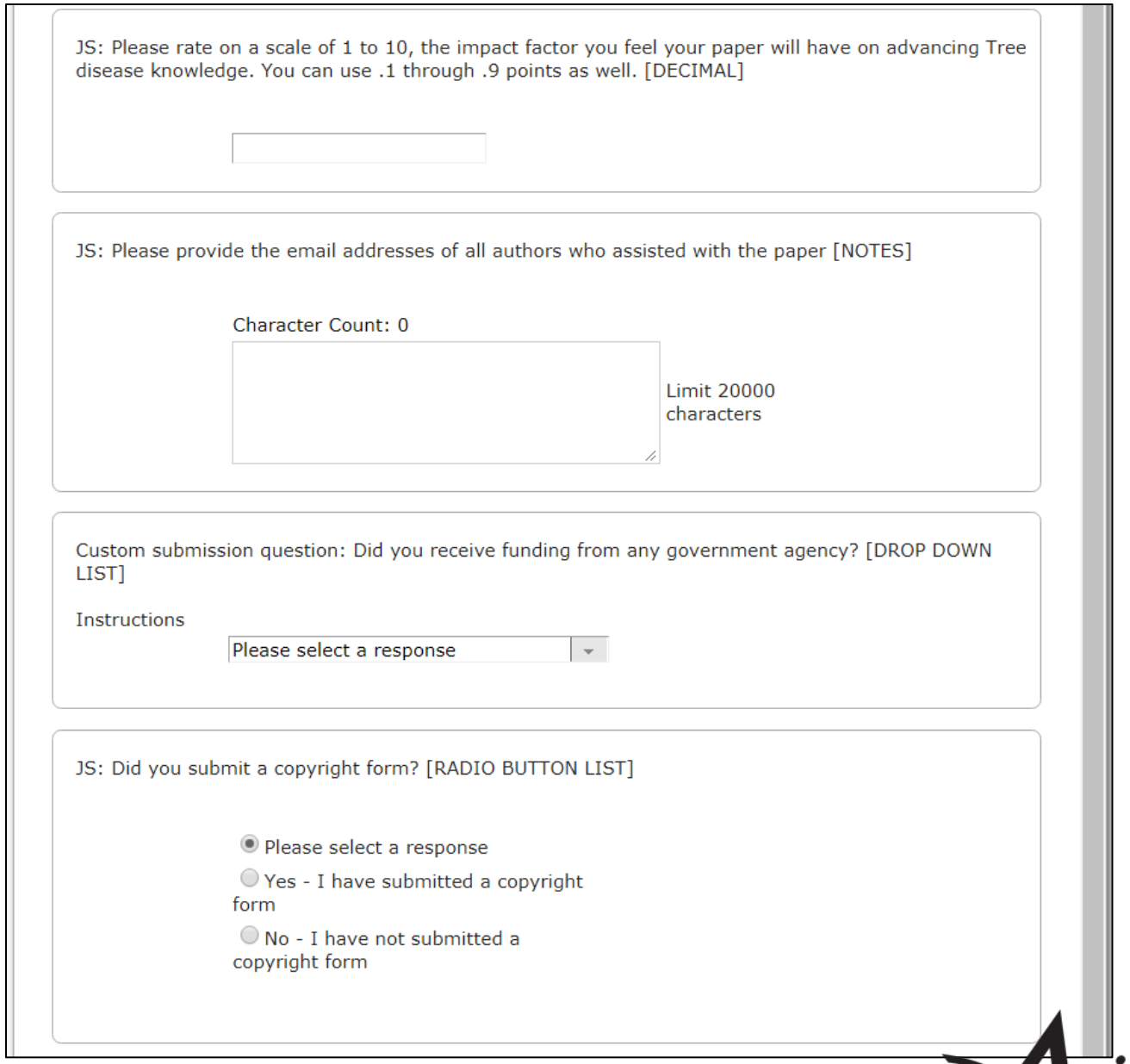
Author and Submission Questionnaires

- Displayed on Additional Information Submission step
- Questions can request answers in many forms



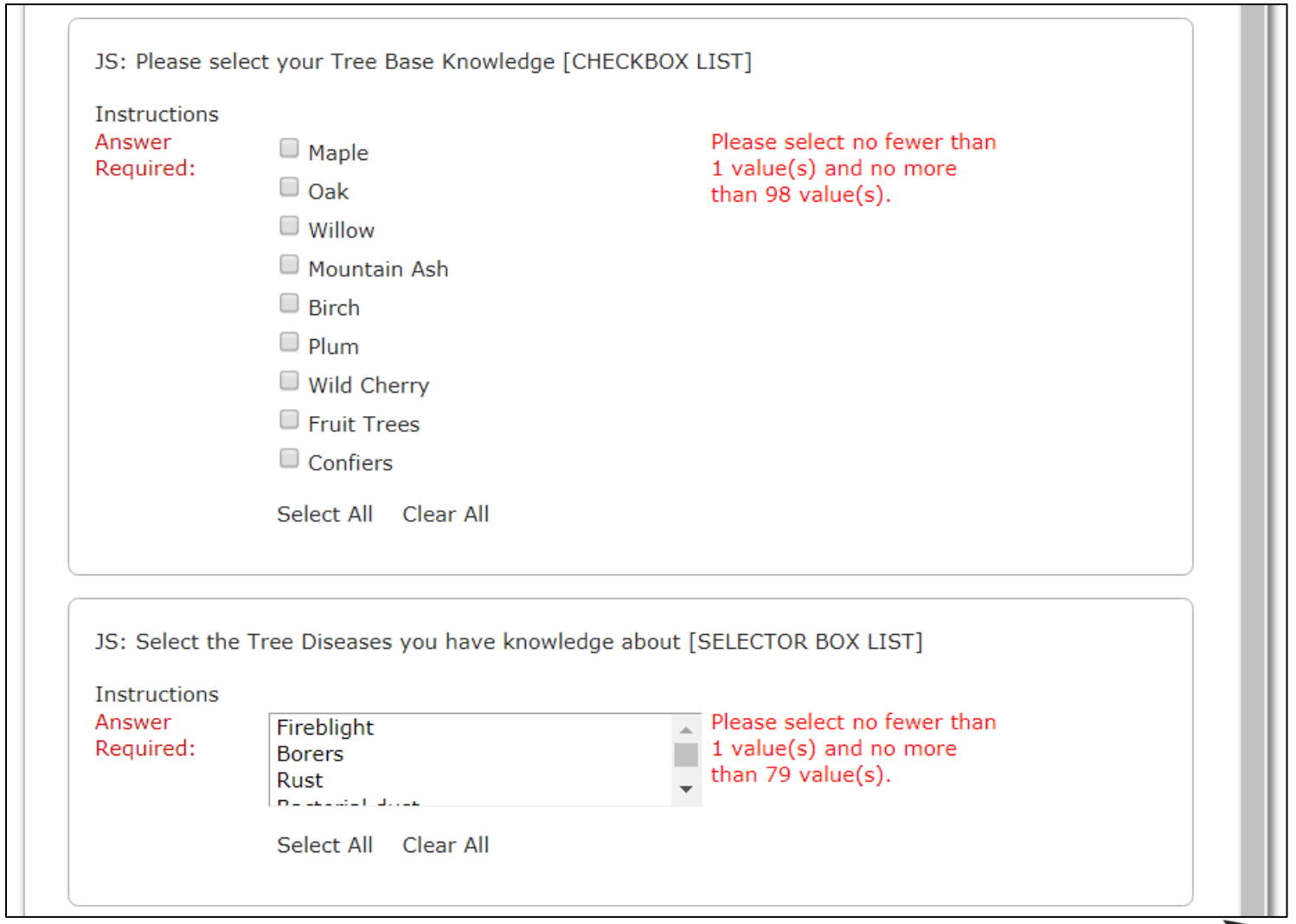
Questionnaires

- Text
- Date
- Integer
- Decimal
- Notes
- Lists



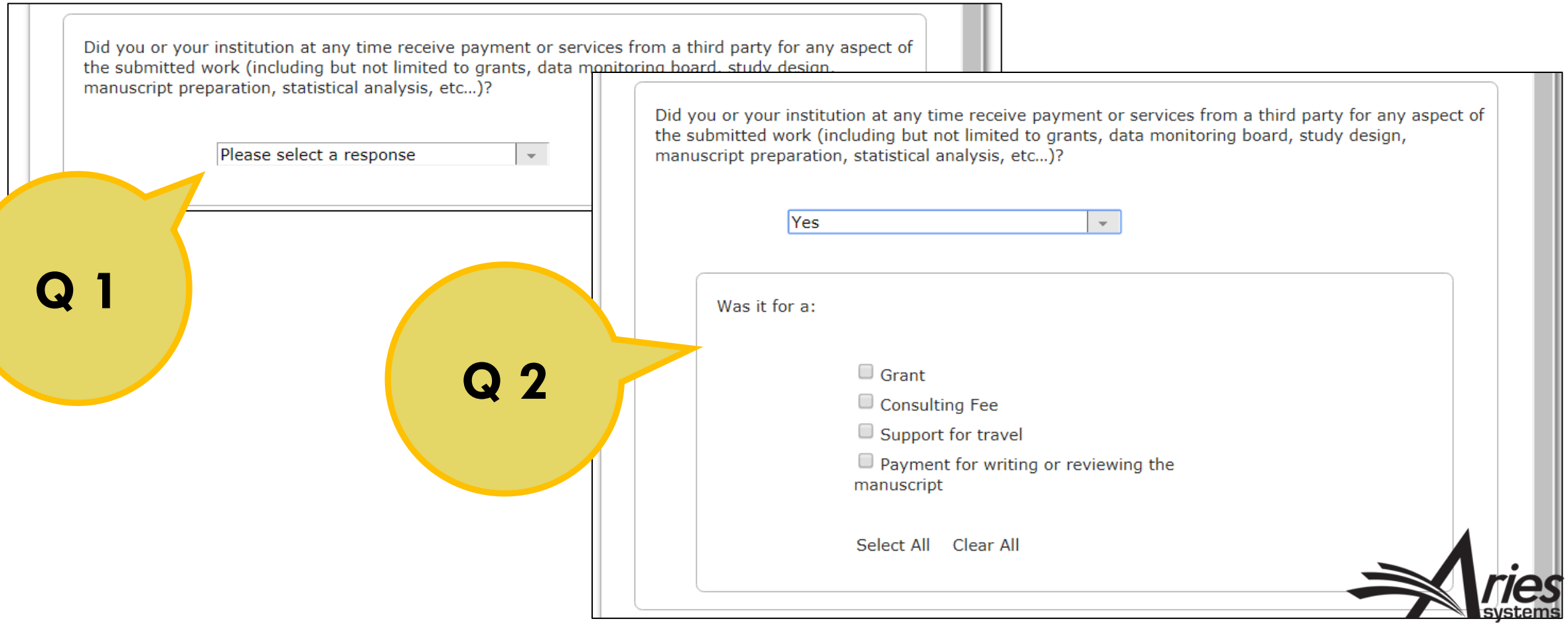
Author and Submission Questionnaires

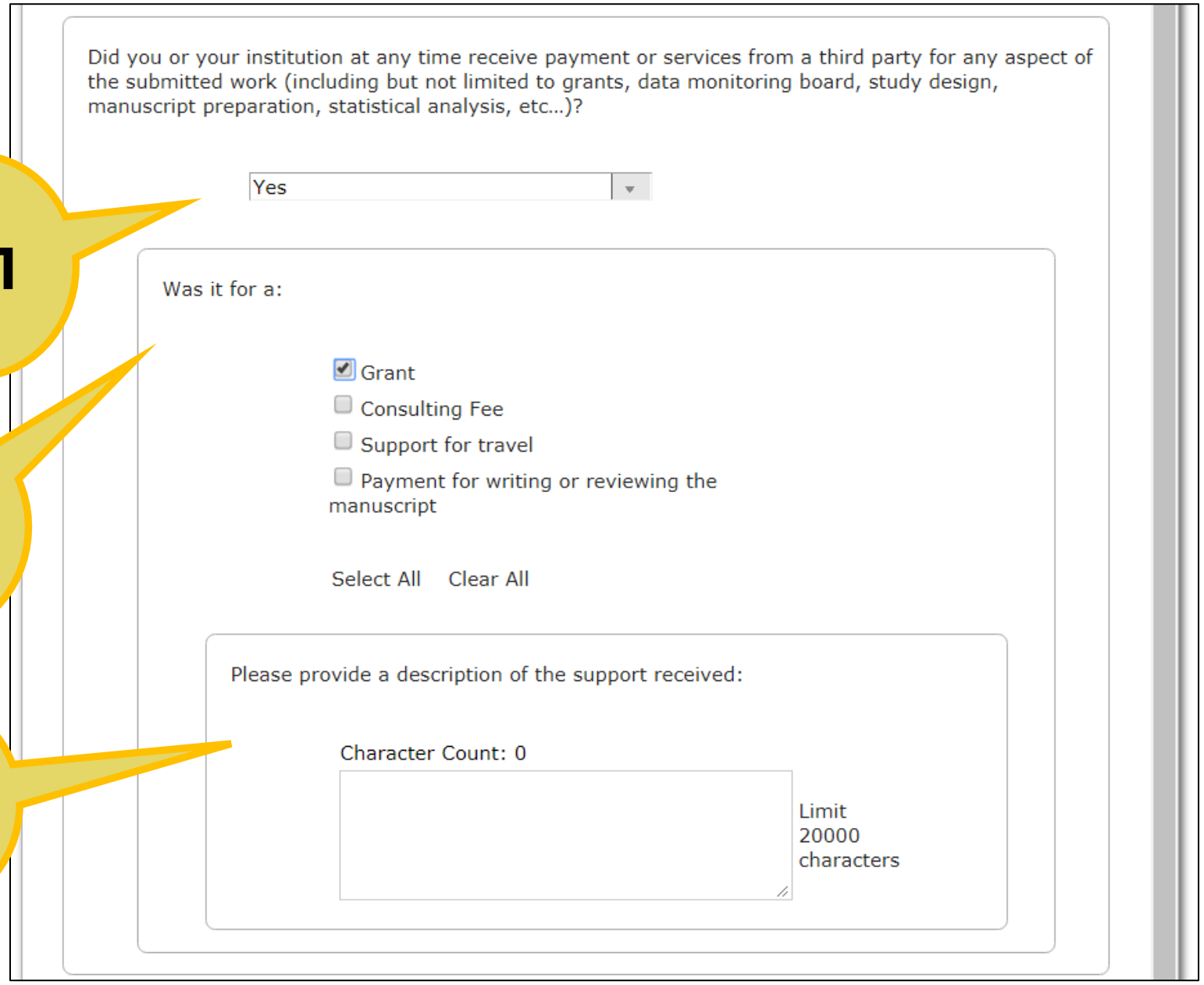
- Drop Down List
- Checkbox List
- Radio Button List
- Selector Box List



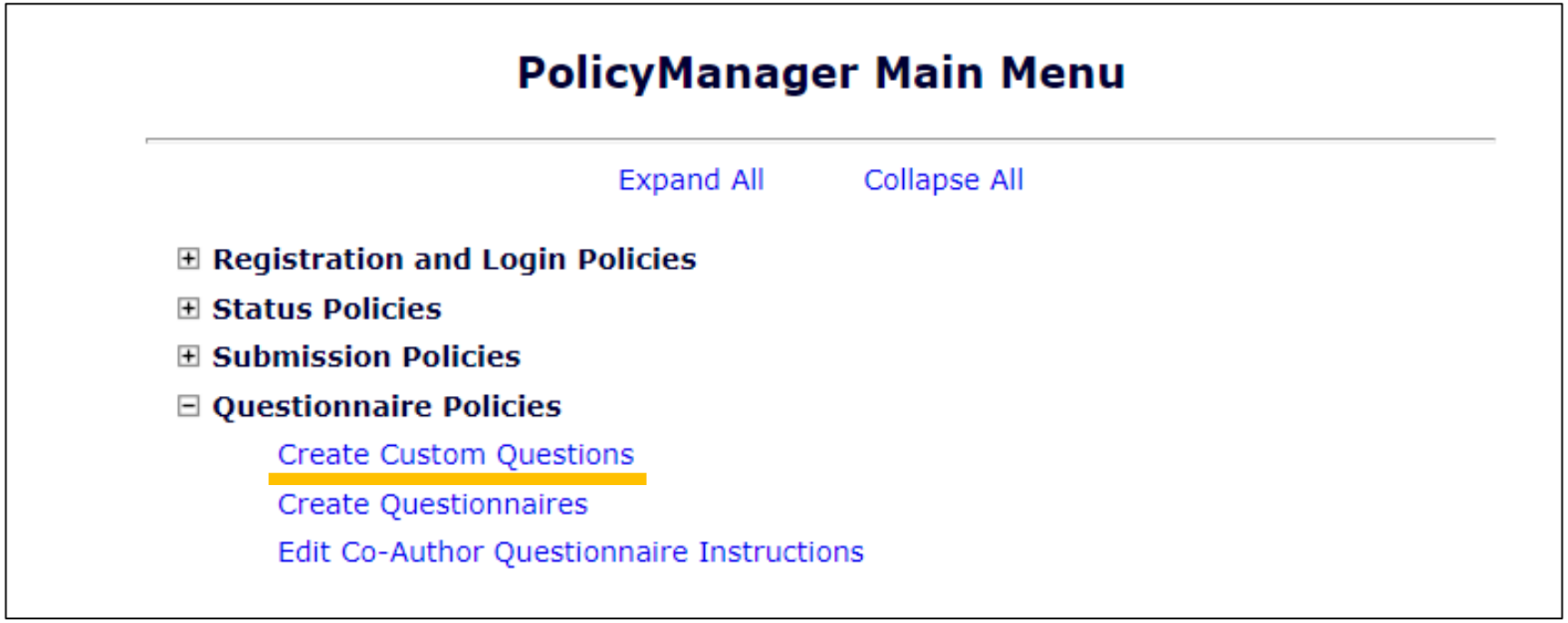
Questionnaires – Follow-on Questions

- You can also configure a follow-on question, or series of questions




Did you or your institution at any time receive payment or services from a third party for any aspect of the submitted work (including but not limited to grants, data monitoring board, study design, manuscript preparation, statistical analysis, etc...)?
Yes
Was it for a:
Grant
Consulting Fee
Support for travel
Payment for writing or reviewing the manuscript
Select All
Clear All
Please provide a description of the support received:
Character Count: 0
Limit 20000 characters
Q 1
Q 2
Q 3

Author and Submission Questionnaires



Configure Questions:

PolicyManager → Questionnaire Policies → Create Custom Questions

Add Custom Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented as part of submission, author verification or production task completion.

If a Custom Question response is associated with a Submission Flag, the Flag will be automatically set if this response is selected or entered by an Author. **NOTE:** This only applies if the question is included on a **Submission** questionnaire. If the question appears on an Author or Production questionnaire, the flag will not be set.

Cancel | Save and Close | Save and Add Another Question

Insert Special Characters

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: Text **Maximum Field Length (1-200):**

Default Value	Value	Flag
◉	None	Associate with Flag
○		Associate with Flag

Integration Options

- [ ] Include in Editorial Transmittal
- [ ] Include in Production Task Transmittal
- [ ] Transmit as Author Note/Footnote

Custom Metadata ID:

Select Custom Metadata ID

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

PDF Cover Page

- [ ] Display

Manuscript Details

- [x] Display

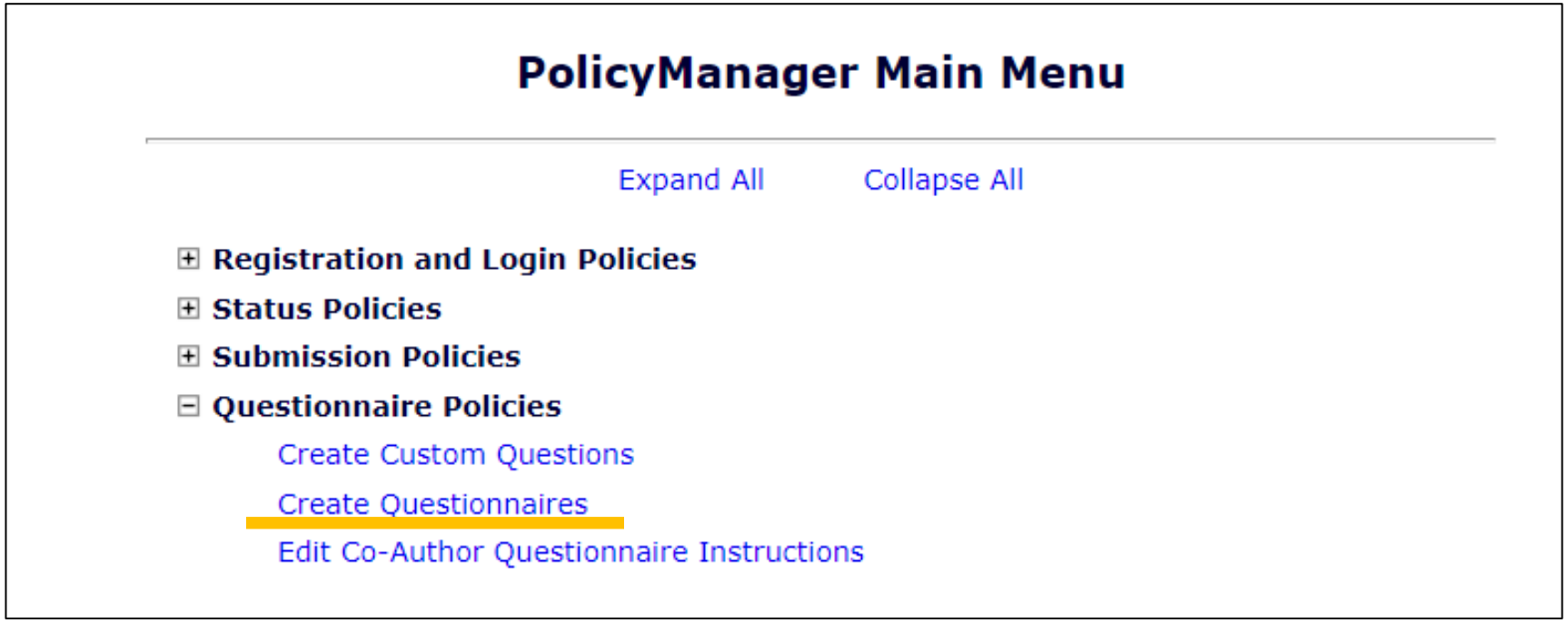
Help Text:

Transmittal Form

- [x] Display
- [ ] Editable
- [ ] Required

Help Text:

Author and Submission Questionnaires



Configure Questions:

PolicyManager → Questionnaire Policies → Create Questionnaires

Configure Questionnaire

Enter a name for the Questionnaire in the 'Questionnaire Name' field. Custom Questions may be added to the Questionnaire by clicking the 'Add Custom Questions' button, selecting Custom Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save the Questionnaire and return to the Create Questionnaire page. Click the 'Remove' link to remove questions from the questionnaire.

Questions that are hidden are displayed in gray text. For multi-part questions, only the Custom Metadata ID associated with the Initial Question is displayed.

The %AUTHOR_QUESTIONNAIRE_SUBSET% merge field pulls in all of the selected Questions and Responses for all Authors on the submission (including the Corresponding Author). To specify questions/responses for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all questions you want to include. Note the %AUTHOR_QUESTIONNAIRE% merge field continues to pull in all questions and responses for the questionnaire.

Questionnaire Name: EEMUG Questionnaire **(50 characters maximum)**

☐ **Hide** When you **Hide** a Questionnaire, it will not be available for use.

Question Display Order:

Order	Question	Custom Metadata ID	Required	Include in Merge Field	Actions
1	Have you previously submitted your talk to a journal for publication?		☐	☐	Remove
2	Did you follow all submission instructions?		☐	☐	Remove
3	§ Is this a question?		☐	☐	Remove

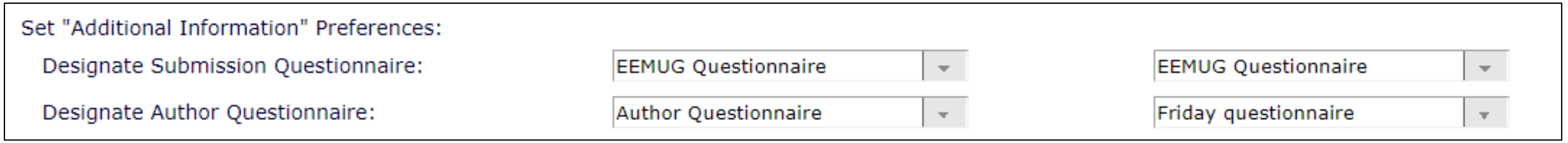
Update Item Order

Add Custom Questions

Cancel Save

Aries systems

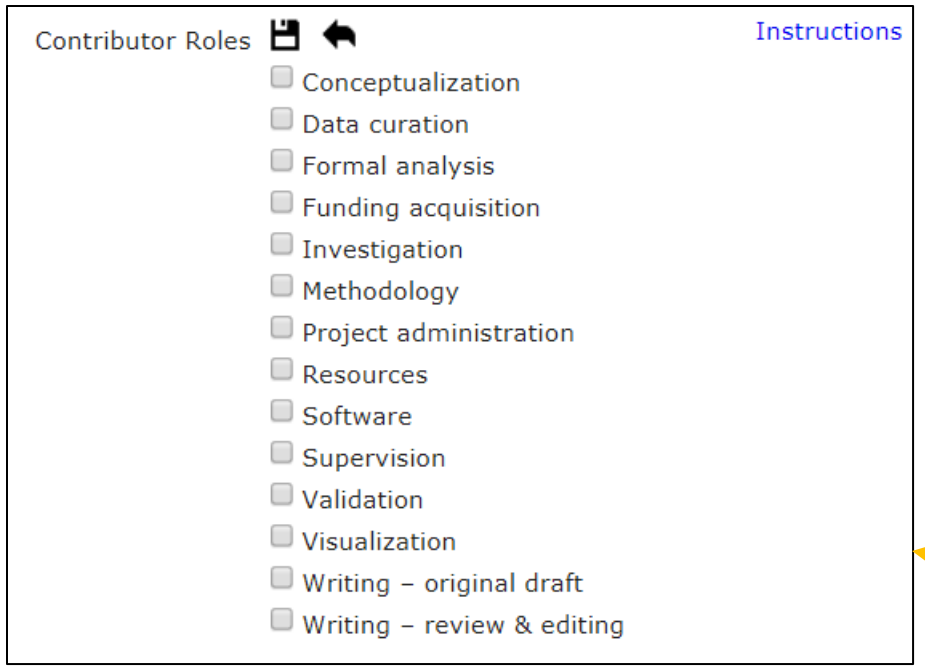
Author and Submission Questionnaires

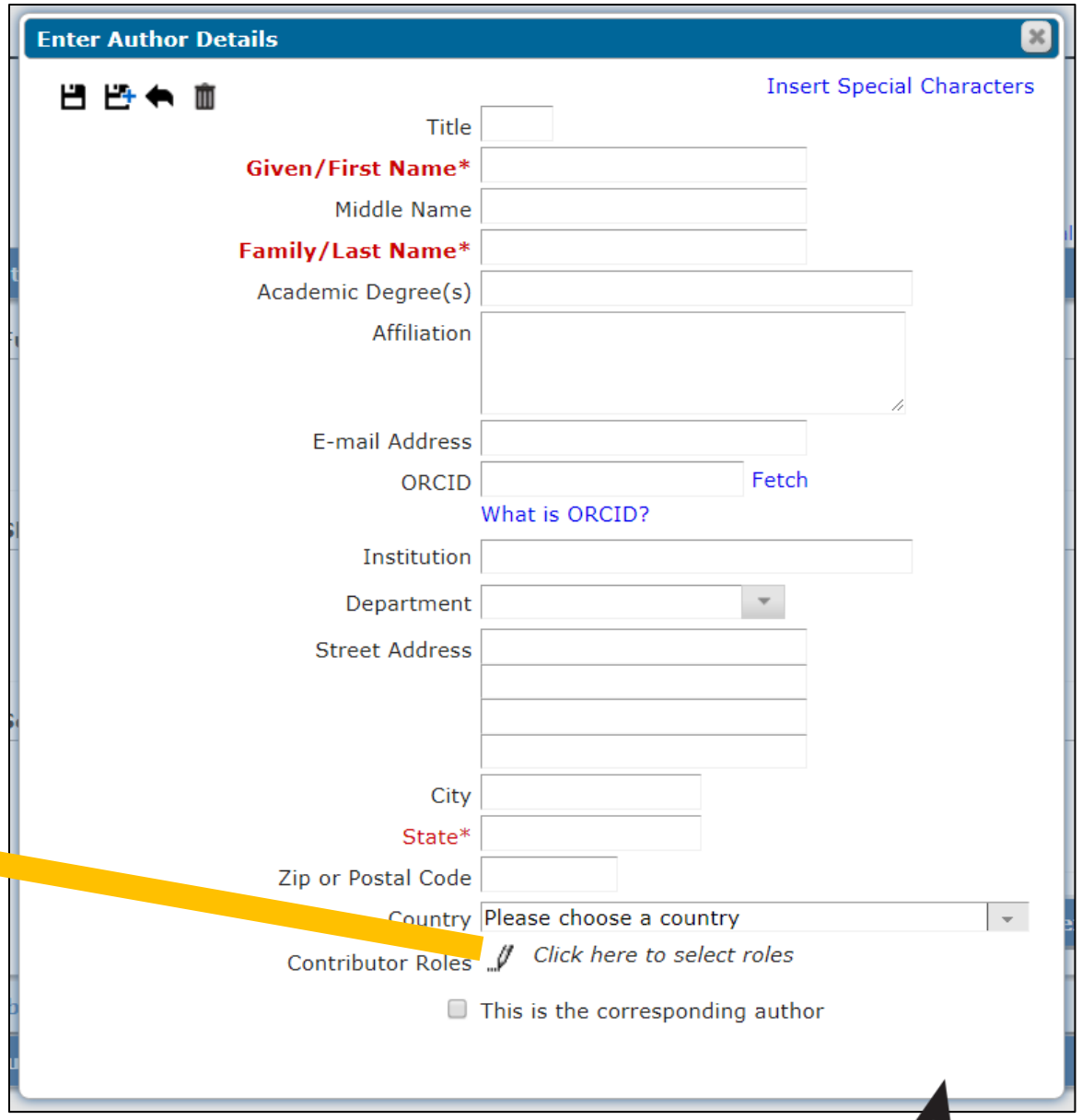


Configure Questions:

PolicyManager → Submission Policies → Edit Article Type

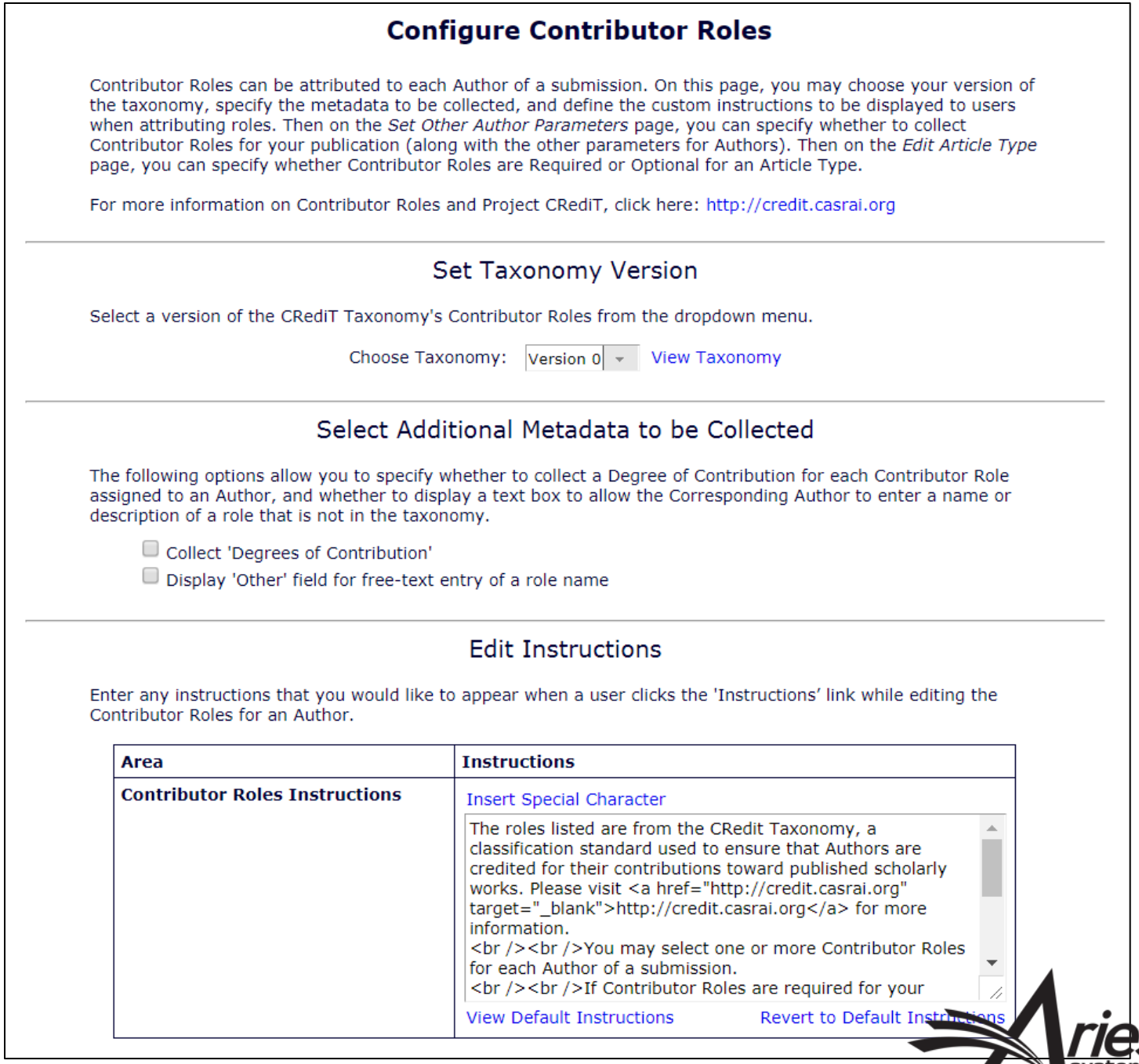
CRediT Contributor Roles





Enable the feature here:

PolicyManager → Configure Contributor Roles



Configure Contributor Roles

Contributor Roles can be attributed to each Author of a submission. On this page, you may choose your version of the taxonomy, specify the metadata to be collected, and define the custom instructions to be displayed to users when attributing roles. Then on the *Set Other Author Parameters* page, you can specify whether to collect Contributor Roles for your publication (along with the other parameters for Authors). Then on the *Edit Article Type* page, you can specify whether Contributor Roles are Required or Optional for an Article Type.

For more information on Contributor Roles and Project CRediT, click here: http://credit.casrai.org

Set Taxonomy Version

Select a version of the CRediT Taxonomy's Contributor Roles from the dropdown menu.

Choose Taxonomy: Version 0 View Taxonomy

Select Additional Metadata to be Collected

The following options allow you to specify whether to collect a Degree of Contribution for each Contributor Role assigned to an Author, and whether to display a text box to allow the Corresponding Author to enter a name or description of a role that is not in the taxonomy.

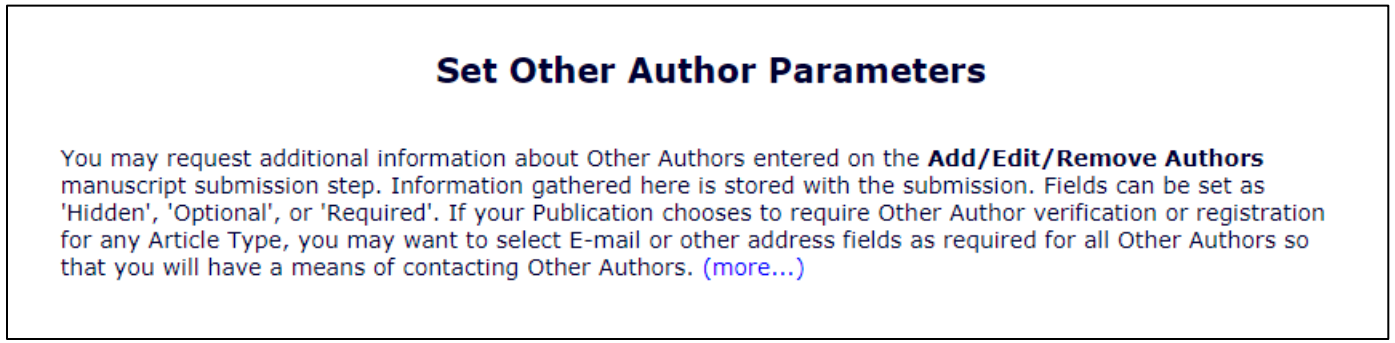
- ☐ Collect 'Degrees of Contribution'
- ☐ Display 'Other' field for free-text entry of a role name

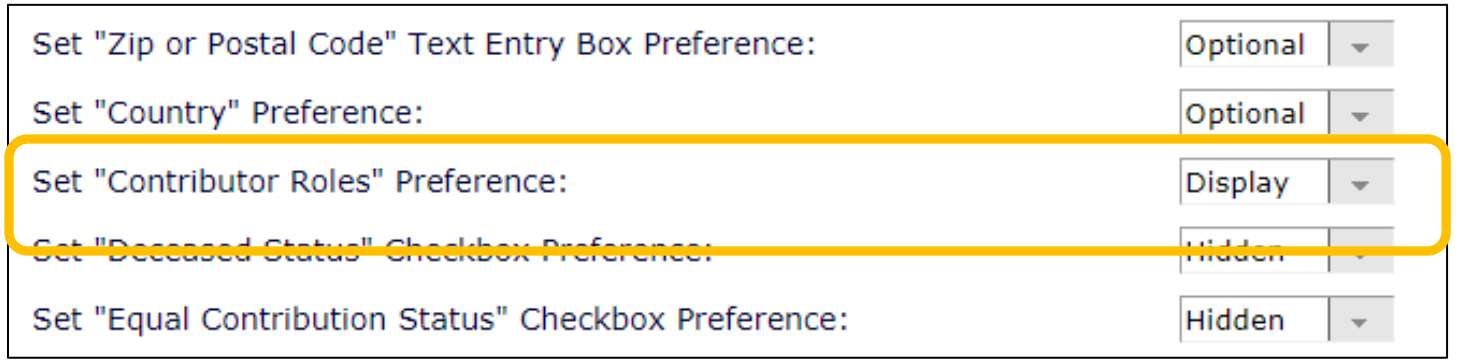
Edit Instructions

Enter any instructions that you would like to appear when a user clicks the 'Instructions' link while editing the Contributor Roles for an Author.

Area	Instructions
Contributor Roles Instructions	Insert Special Character The roles listed are from the CRedit Taxonomy, a classification standard used to ensure that Authors are credited for their contributions toward published scholarly works. Please visit http://credit.casrai.org for more information. You may select one or more Contributor Roles for each Author of a submission. If Contributor Roles are required for your View Default Instructions Revert to Default Instructions

CRediT Contributor Roles

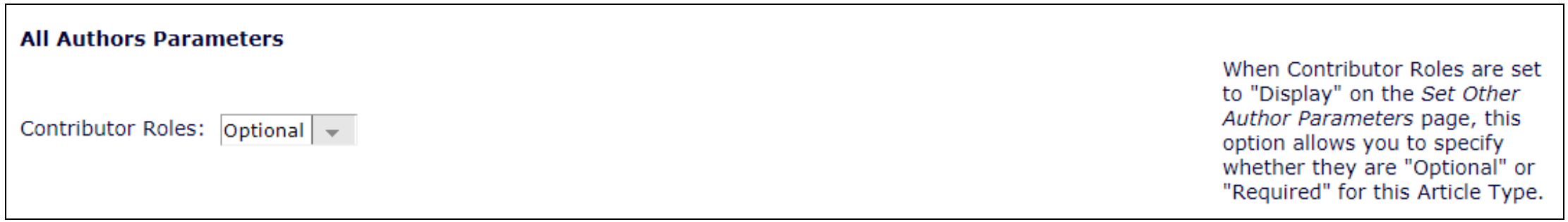




Configure it to “Display”:

PolicyManager → Set Other Author Parameters

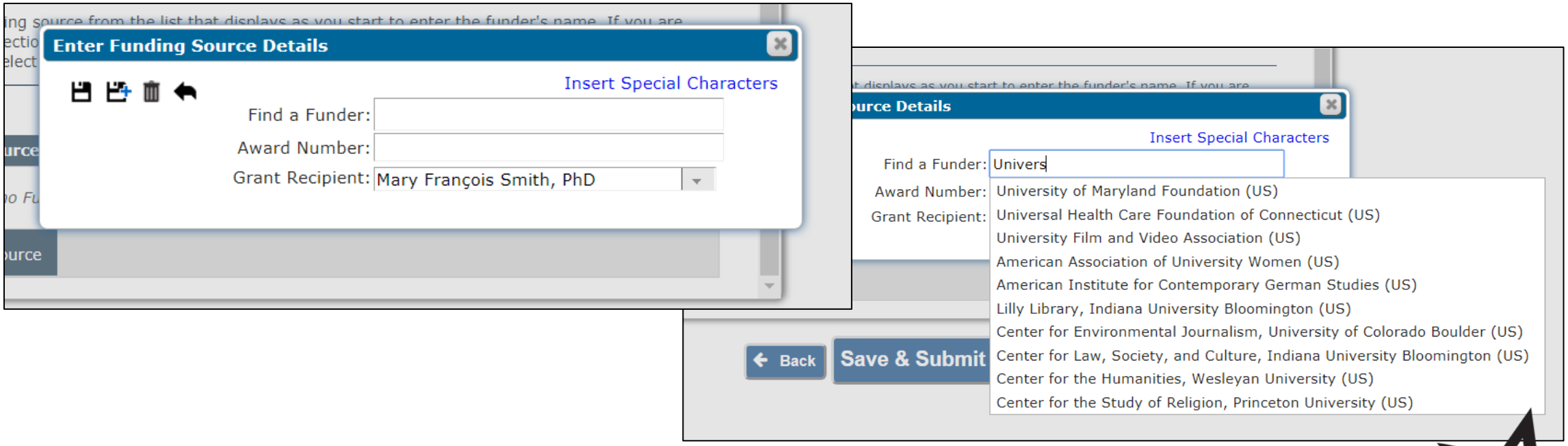
CRediT Contributor Roles



Configure it as Optional or Required for Article Types:
PolicyManager → Configure Article Types

Capture Funding Information

- Collect grant funding information from your Authors
- Funding Institution Names are standardized using the CrossRef Funder Registry



Capture Funding Information

Article Type Parameters	New Submission	Revised Submission
Set Secondary "Full Title" Preferences:	Hidden	Optional
Set "Short Title" Preferences:	Optional	Optional
Set Secondary "Short Title" Preferences:	Optional	Optional
Set "Funding Information" Preferences:	Required	Optional
Set "Select Section/Category" Preferences:	Optional	Optional
Set "Submit Abstract" Preferences:	Optional	Optional

Configure the feature here:

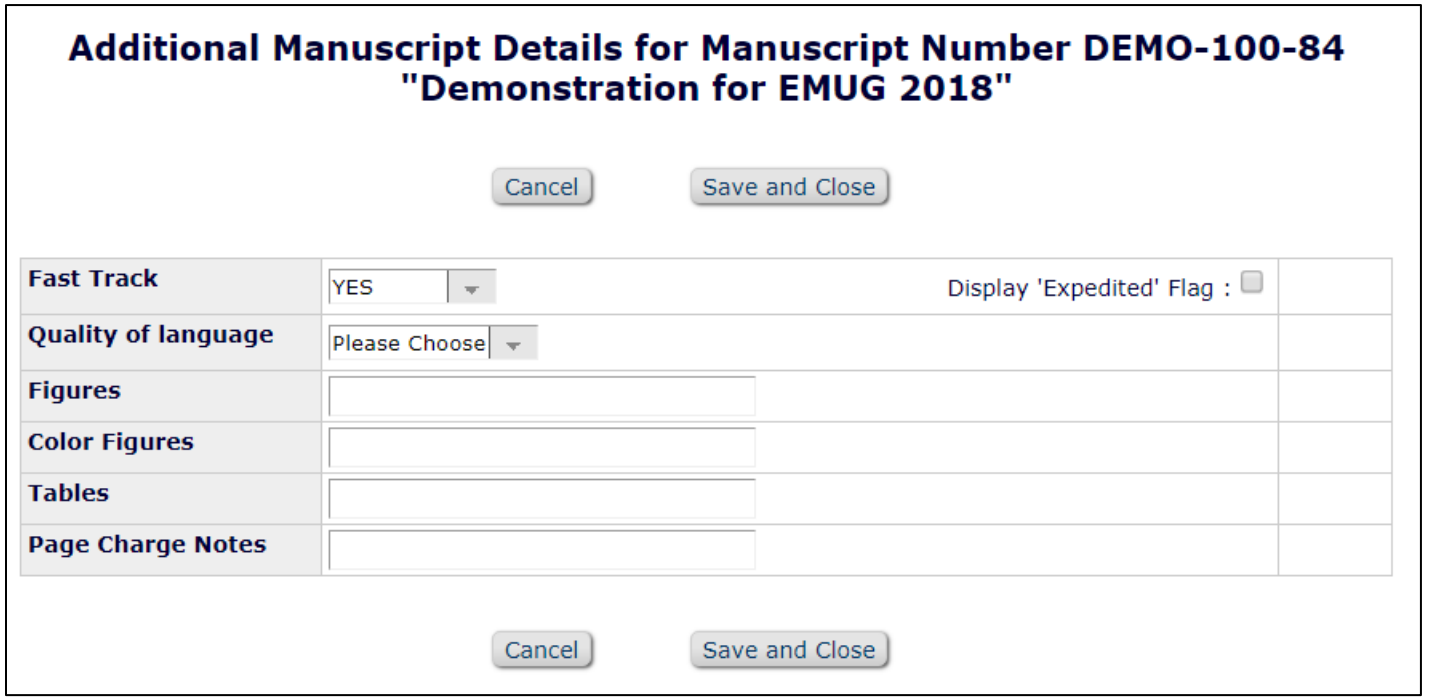
PolicyManager → Submission Policies → Edit Article Types

Set as Optional or Required

Editorial Features

Additional Manuscript Details (AMDs)

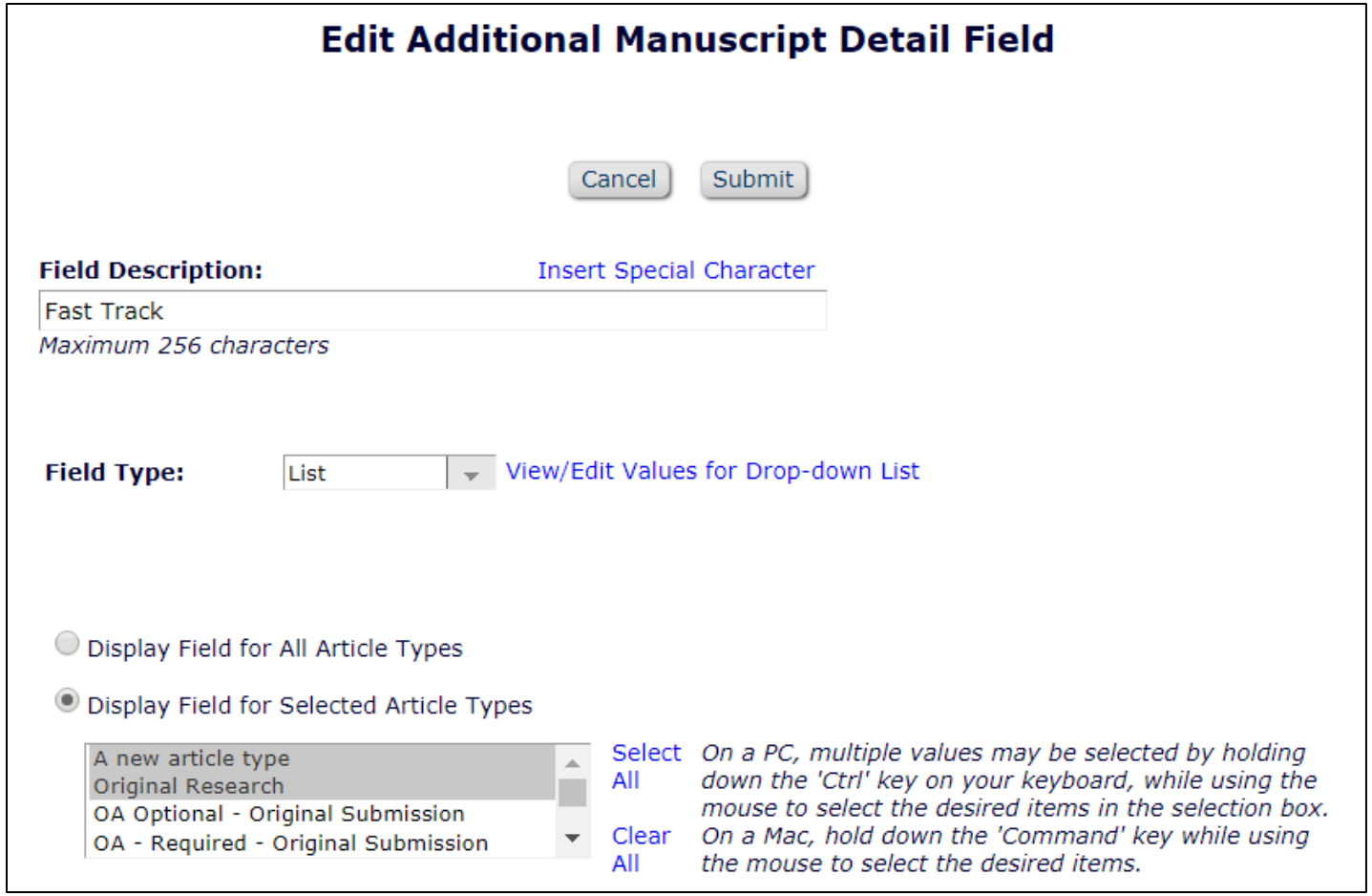
- Define custom fields to associate with submissions
- Can be used for capturing additional information, such as identifying candidates for fast track publication



Additional Manuscript Details (AMDs)

Configure the feature here:

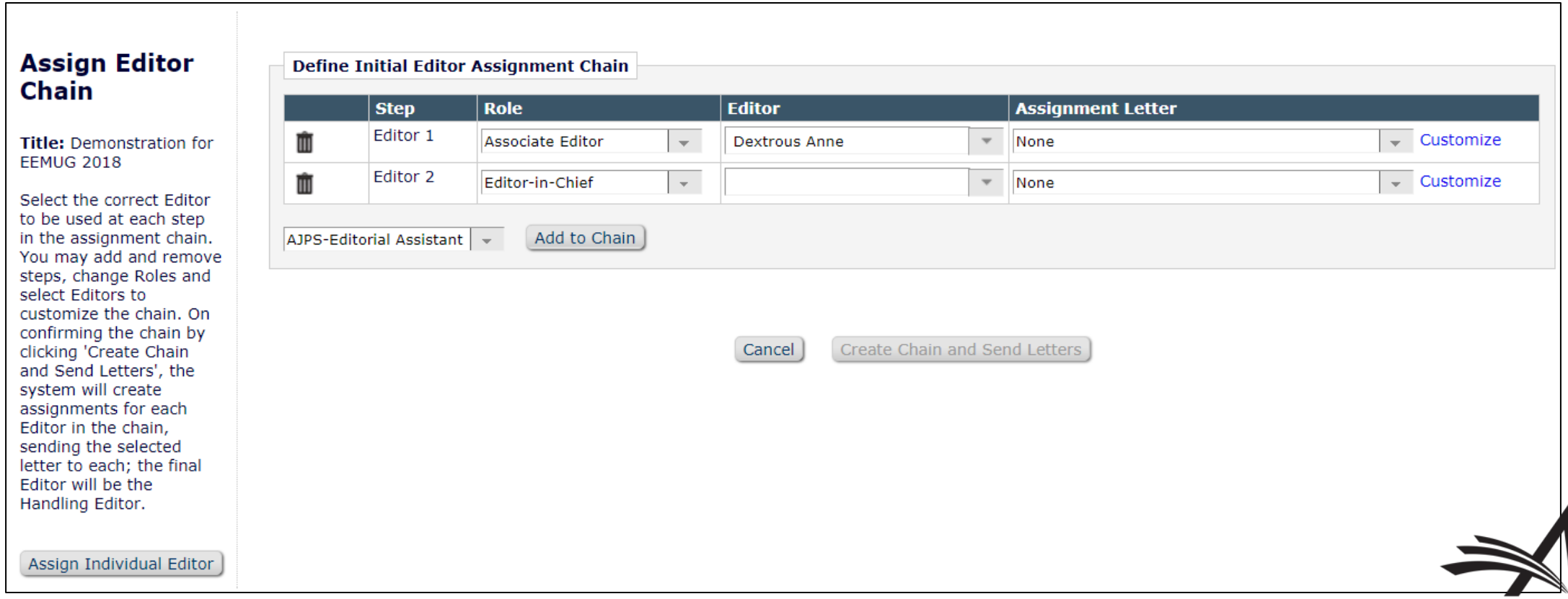
PolicyManager →
Additional Data Policies →
Add/Edit Additional
Manuscript Detail Fields



Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	☐	☑	**N/A**	
Manuscript Details	☐	☐	**N/A**	
Transmittal Form	☑	☐	☐	
	Custom Metadata ID: Select Custom Metadata ID			
Display for Invited Submissions	☑	**N/A**	**N/A**	
Search Submission	☐	**N/A**	**N/A**	**N/A**
Search Proposal	☑	**N/A**	**N/A**	**N/A**
Schedule Group TOC	☐	☐	**N/A**	**N/A**

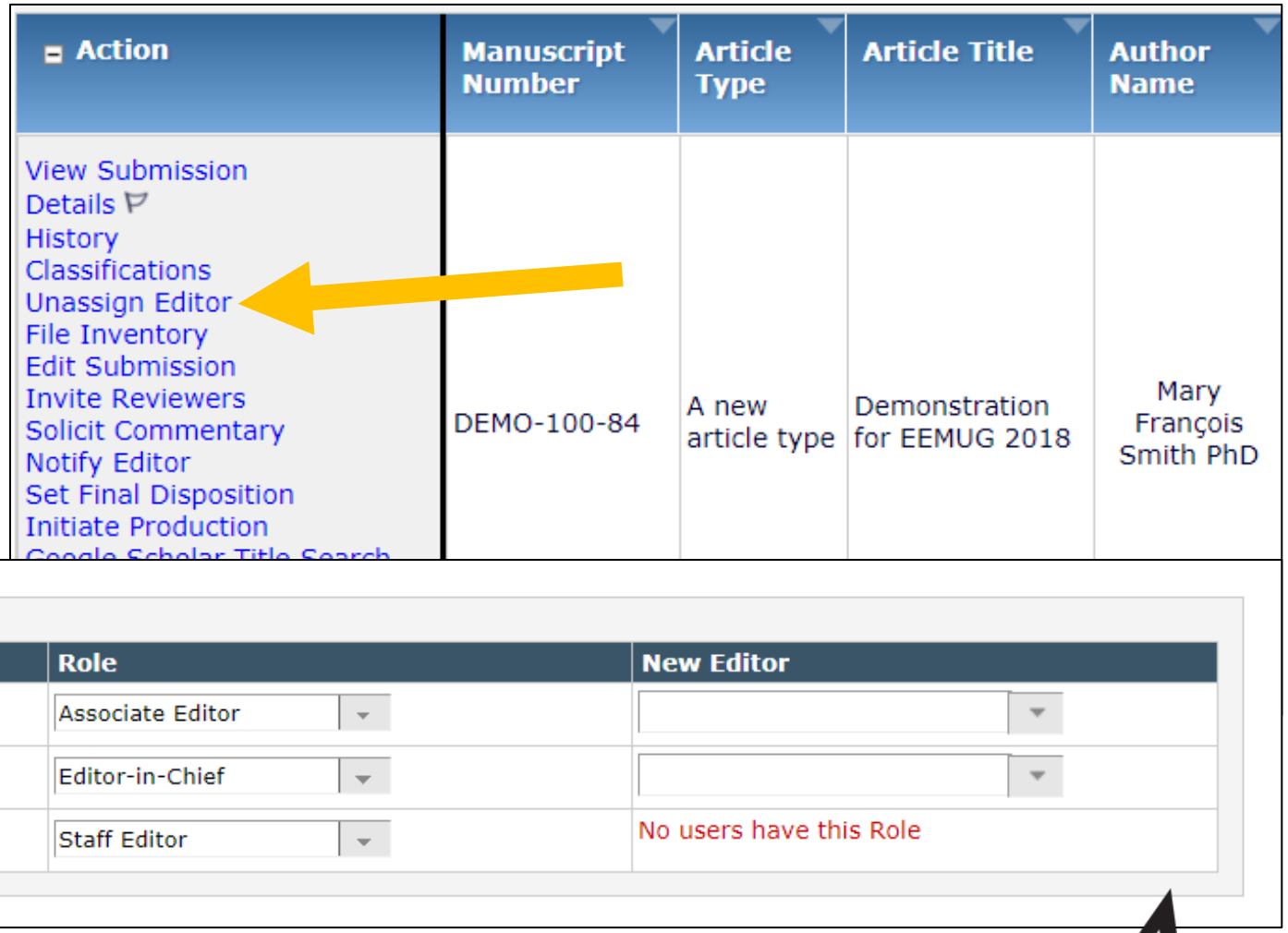
Editor Chains and Alternates

- Assign multiple Editors at the same time
- Create chain templates and associate them with different Article Types

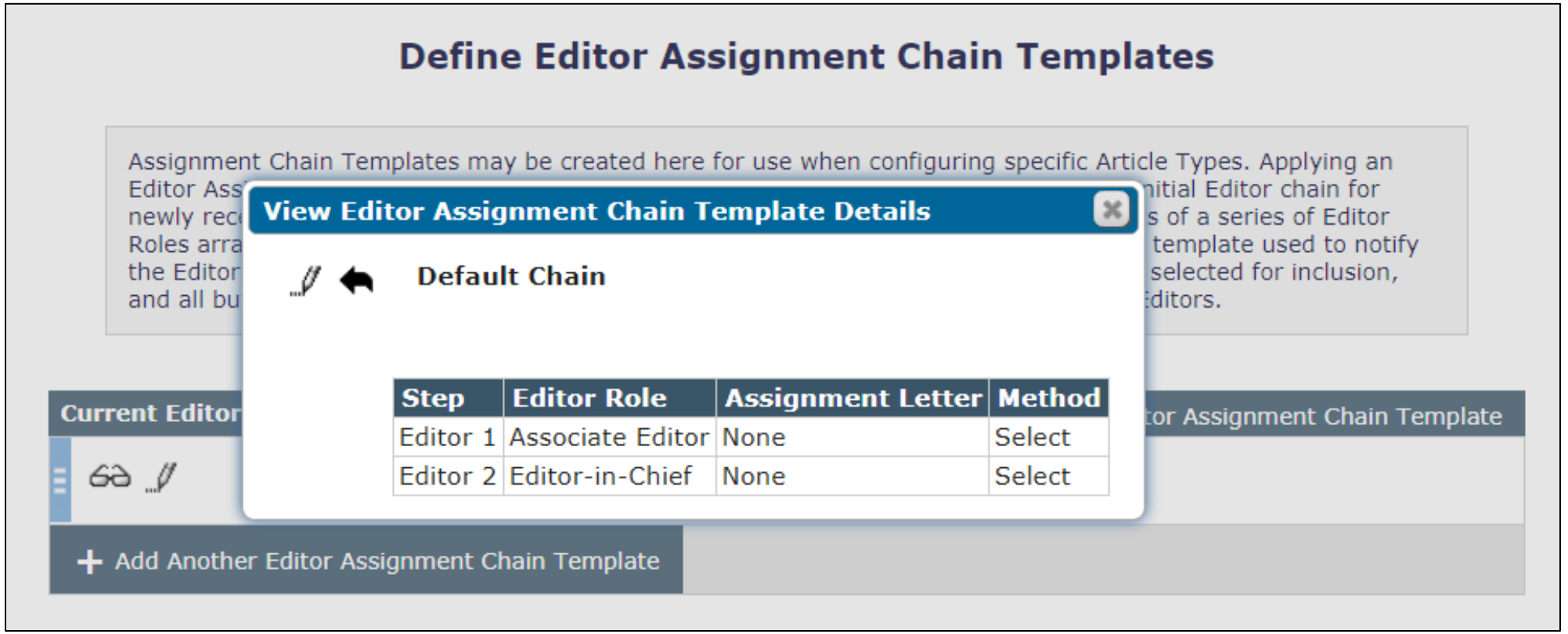


Editor Chains and Alternates

- Swap Editors mid-chain by clicking Unassign Editor link



Editor Chains and Alternates



Enable the feature here:

PolicyManager → Define Editor Assignment Chain Templates

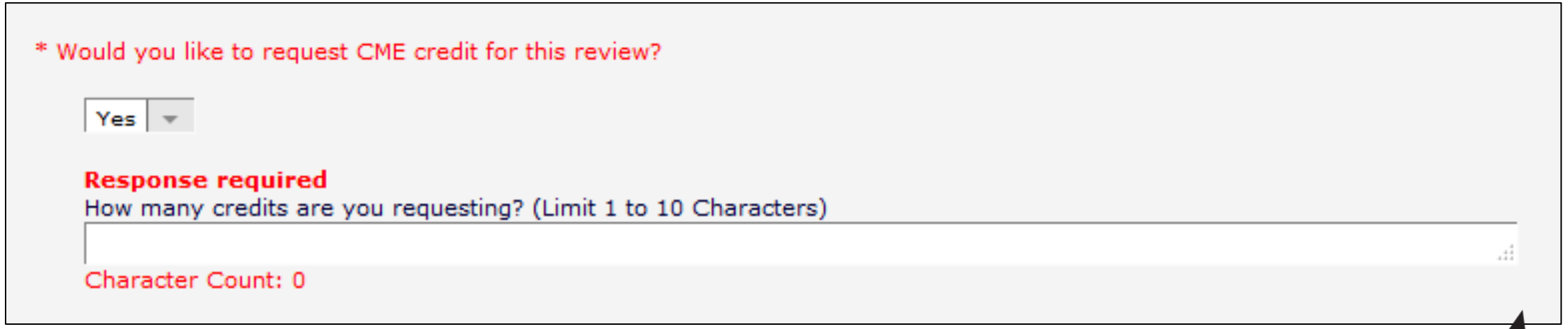
Editor Chains and Alternates

Enable the feature here:

PolicyManager → Edit Article Types

Custom Review Questions

- More useful than Manuscript Rating Questions
- Gather information for Reporting
- Display on Editor Form
- Can be included in merge fields



Custom Review Questions

Review Questions

Are the conclusions valid from the data presented? Insert Special Character

No

(Limit 250 Characters)

Character Count: 0

Please detail any logical fallacies or misleading statistics used in this study. (Limit 18000 Characters)

None

Character Count: 4

---

*Is this manuscript a candidate for fast-tracking?

Yes

Custom Review Questions

- Create/Edit Custom Review Questions
- Create/Edit Review Forms
- Match Review Forms to Article Types and Reviewer Roles

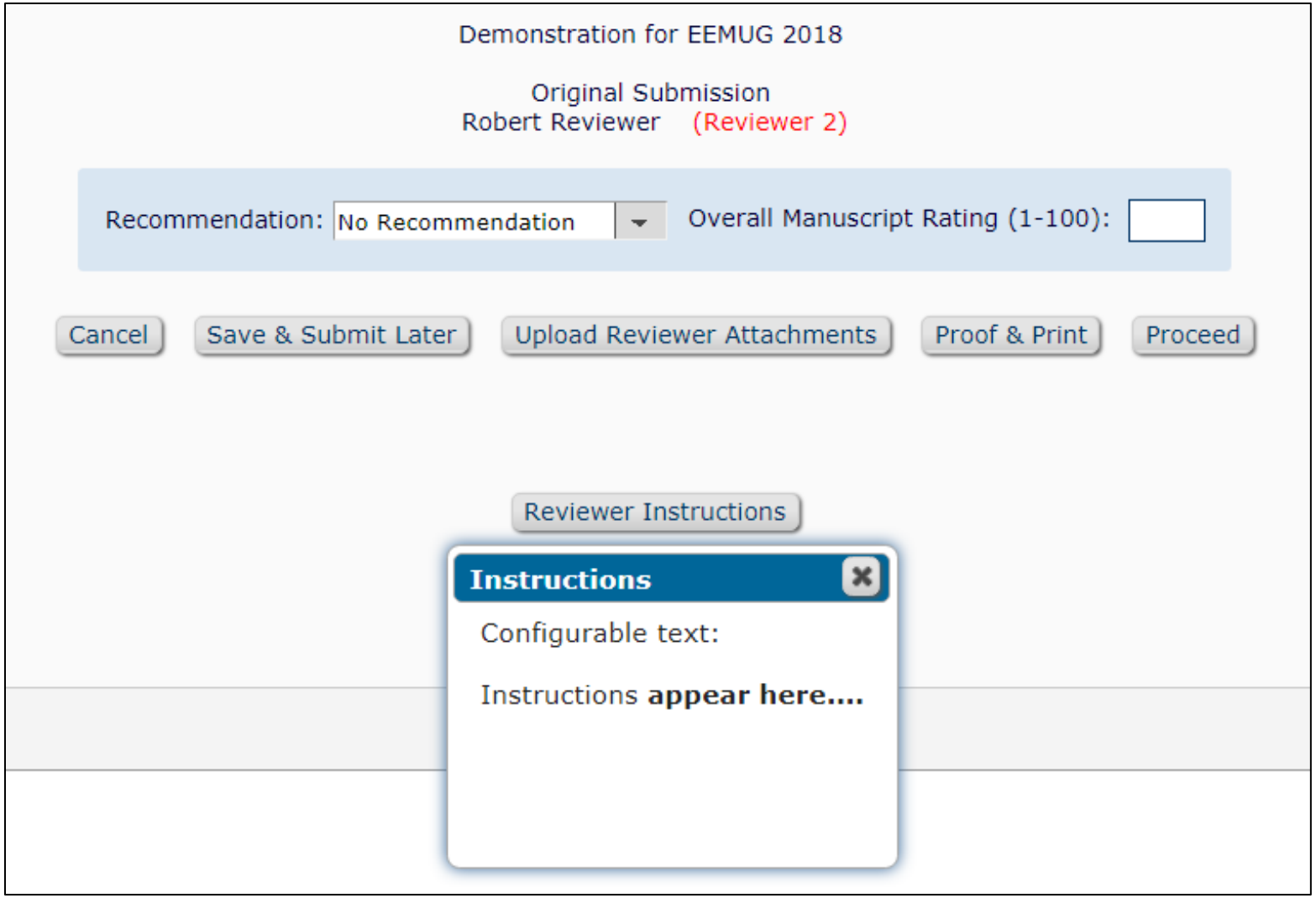
Configure the feature here:

PolicyManager → Reviewer and Editor Form Policies → Reviewer Recommendation Policies section

Instructions for Reviewers

- Customize the instructions
- Display on the page or as a popup

Instructions for Reviewers



Flags!

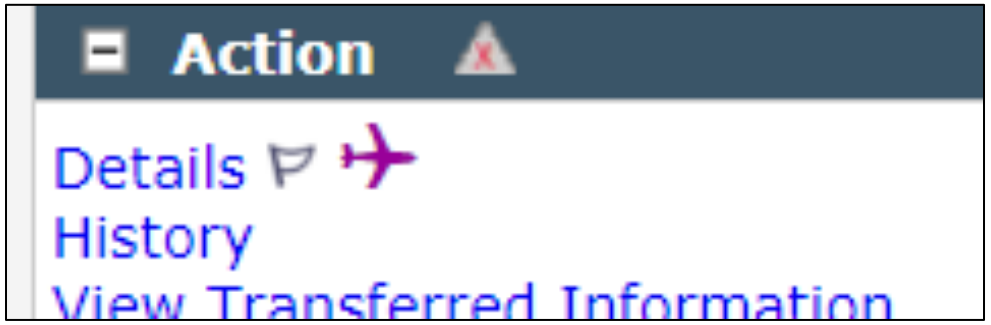
Aries systems

Flags

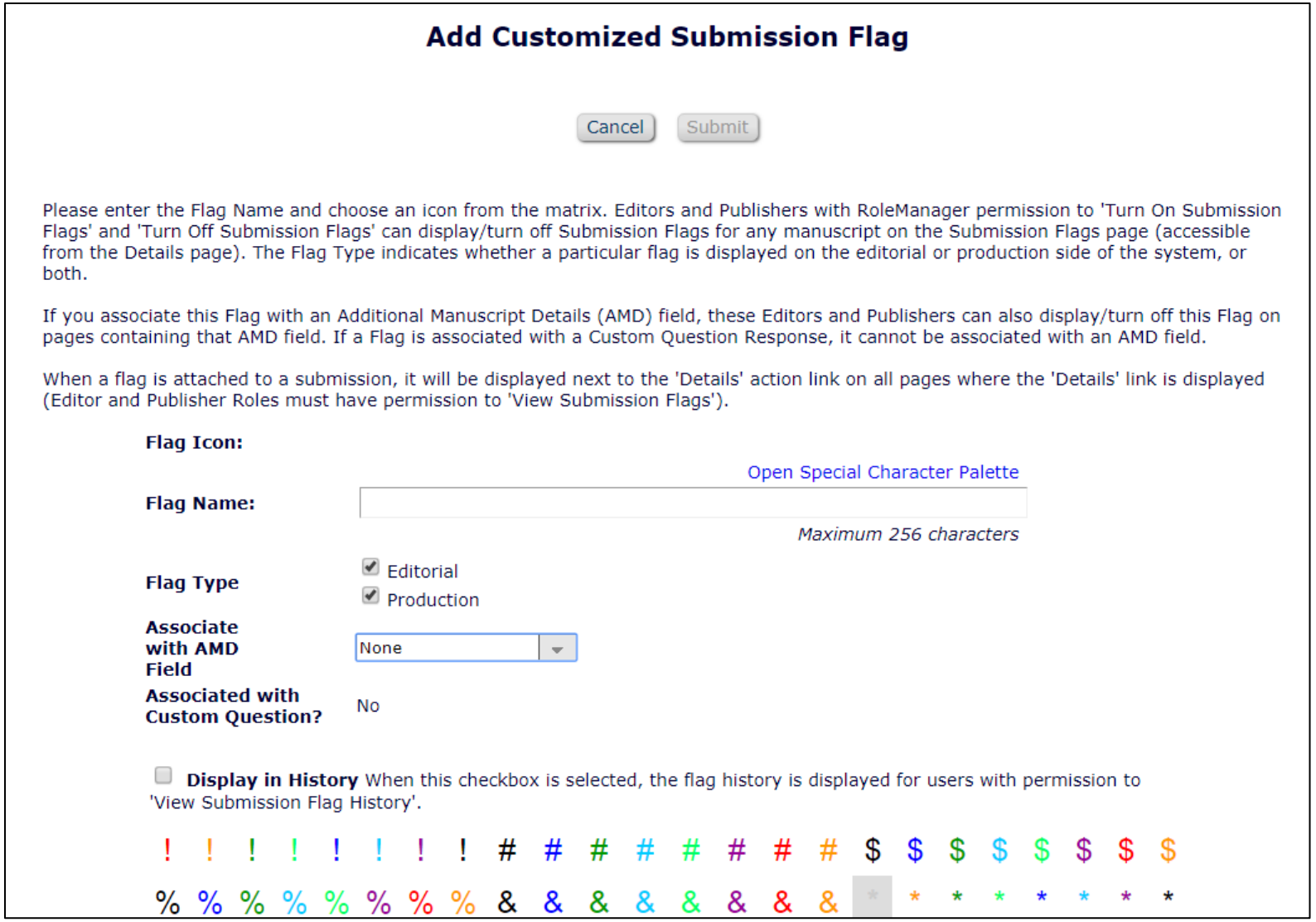
- So many flags, so little time….
- Custom Flags
  - Submissions
  - People
  - Schedule Group (ProduXion Manager)
- Configured in PolicyManager

Custom Submission Flags

- Publications may configure their own flags for any number of uses
- Flags are set (turned on) on the 'Submission Flags' pop-up page, accessible from the 'Details' pages and flag next to Details link
- When on, flags are displayed next to the Details link in the Action column, and also on the Details page
- Submission Flags are visible to Editor or Publisher roles (by permission)



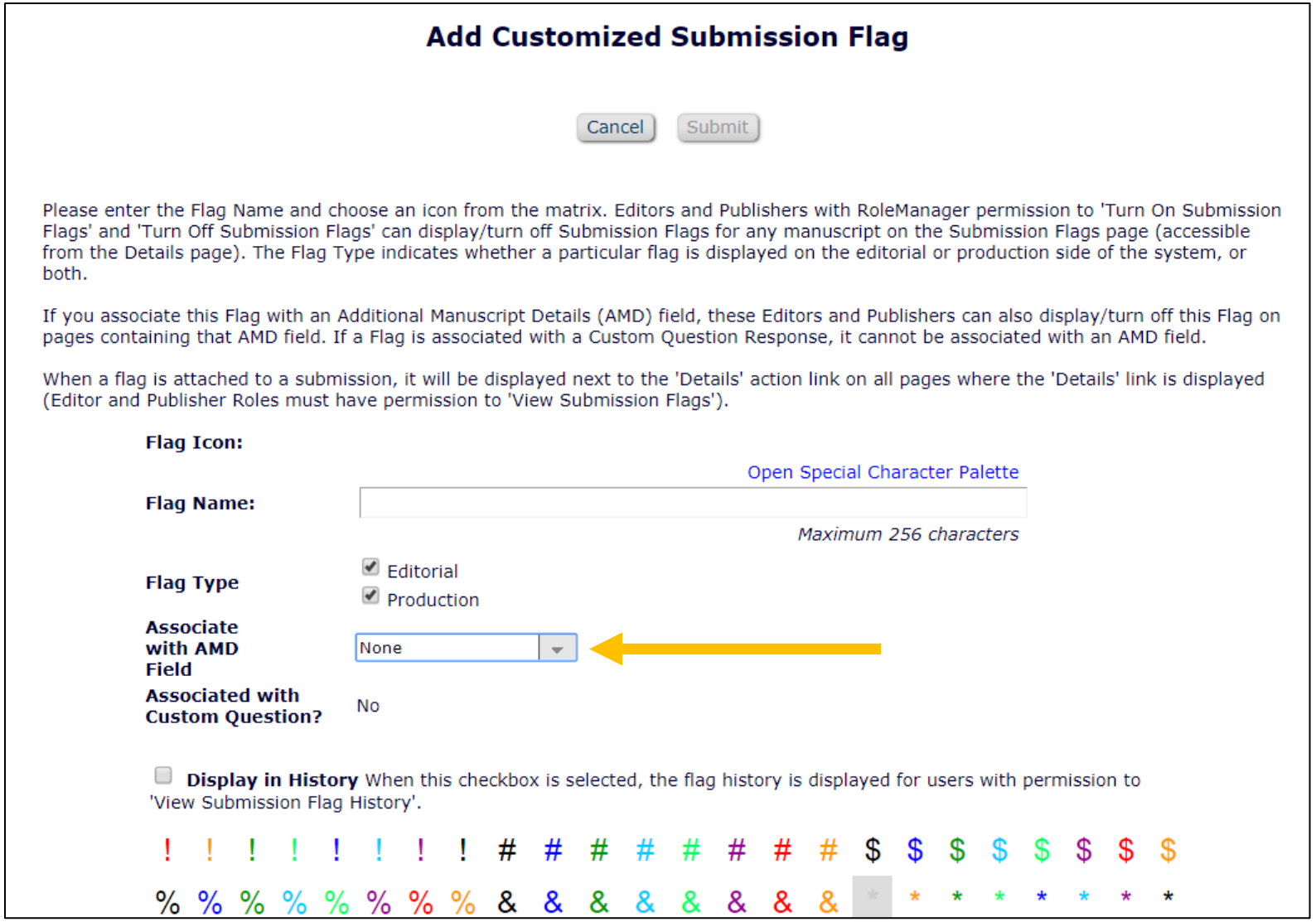
Custom Submission Flags



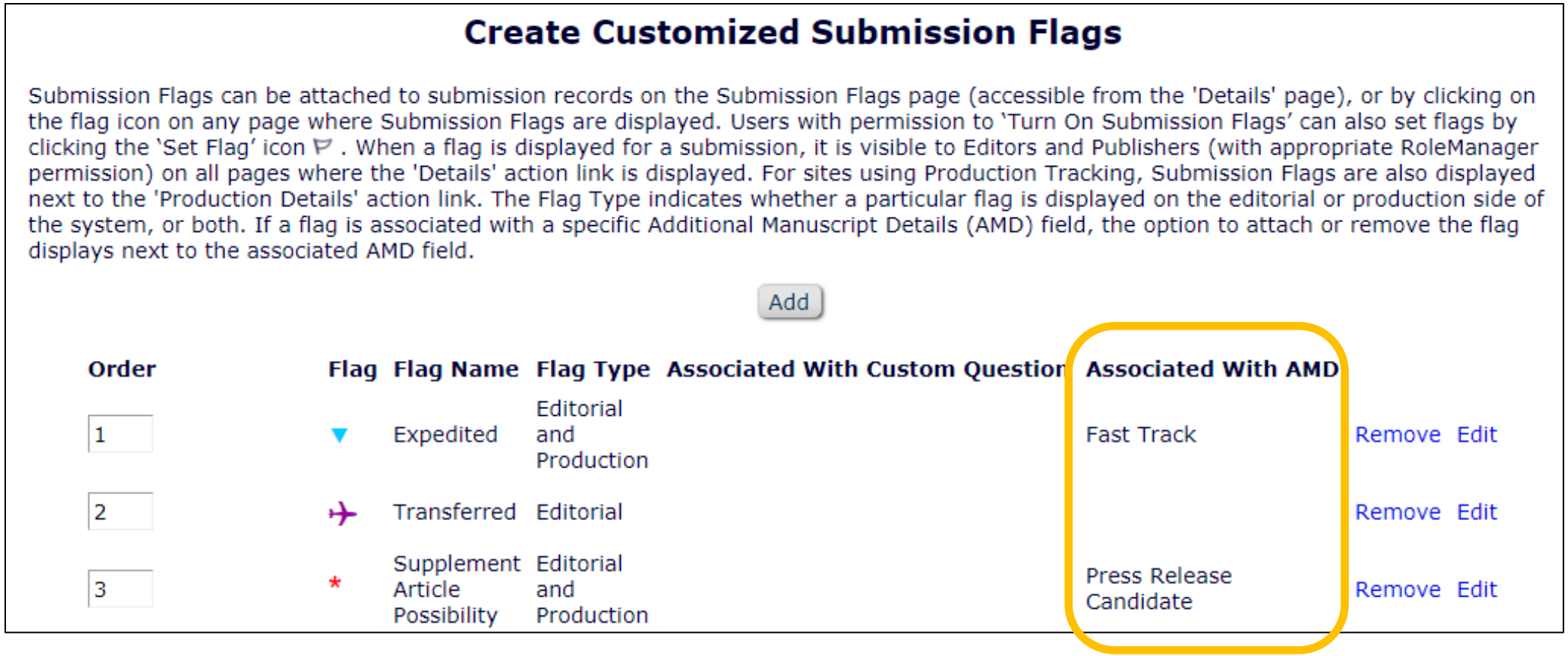
Custom Submis

Aries systems

Custom Submission Flags



Custom Submission Flags



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 Custom Question	Associated With AMD	
1	▼	Expedited	Editorial and Production		Fast Track	Remove Edit
2	✈	Transferred	Editorial			Remove Edit
3	*	Supplement Article Possibility	Editorial and Production		Press Release Candidate	Remove Edit

Custom Submission Flags

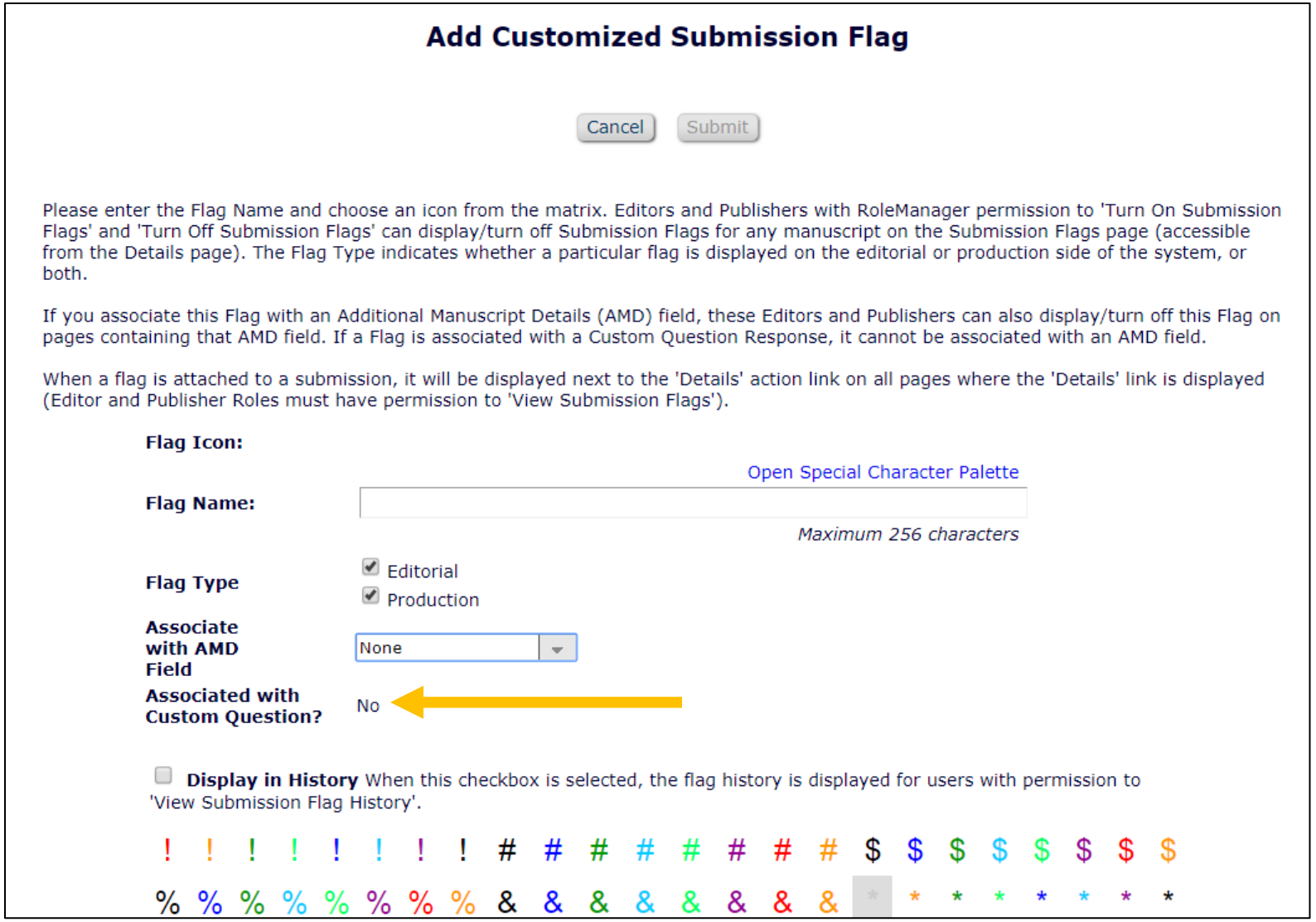
Add/Edit Additional Manuscript Detail Fields

Listed below are the Additional Manuscript Detail Fields added for your journal. The values for these fields are entered manually on the Additional Manuscript Details page or the Transmittal Form, or can also be added to Custom Details Page layouts. If a Custom Flag has been configured to be Associated with an Additional Manuscript Detail field, an option to turn that Flag on or off will also appear next to the field.

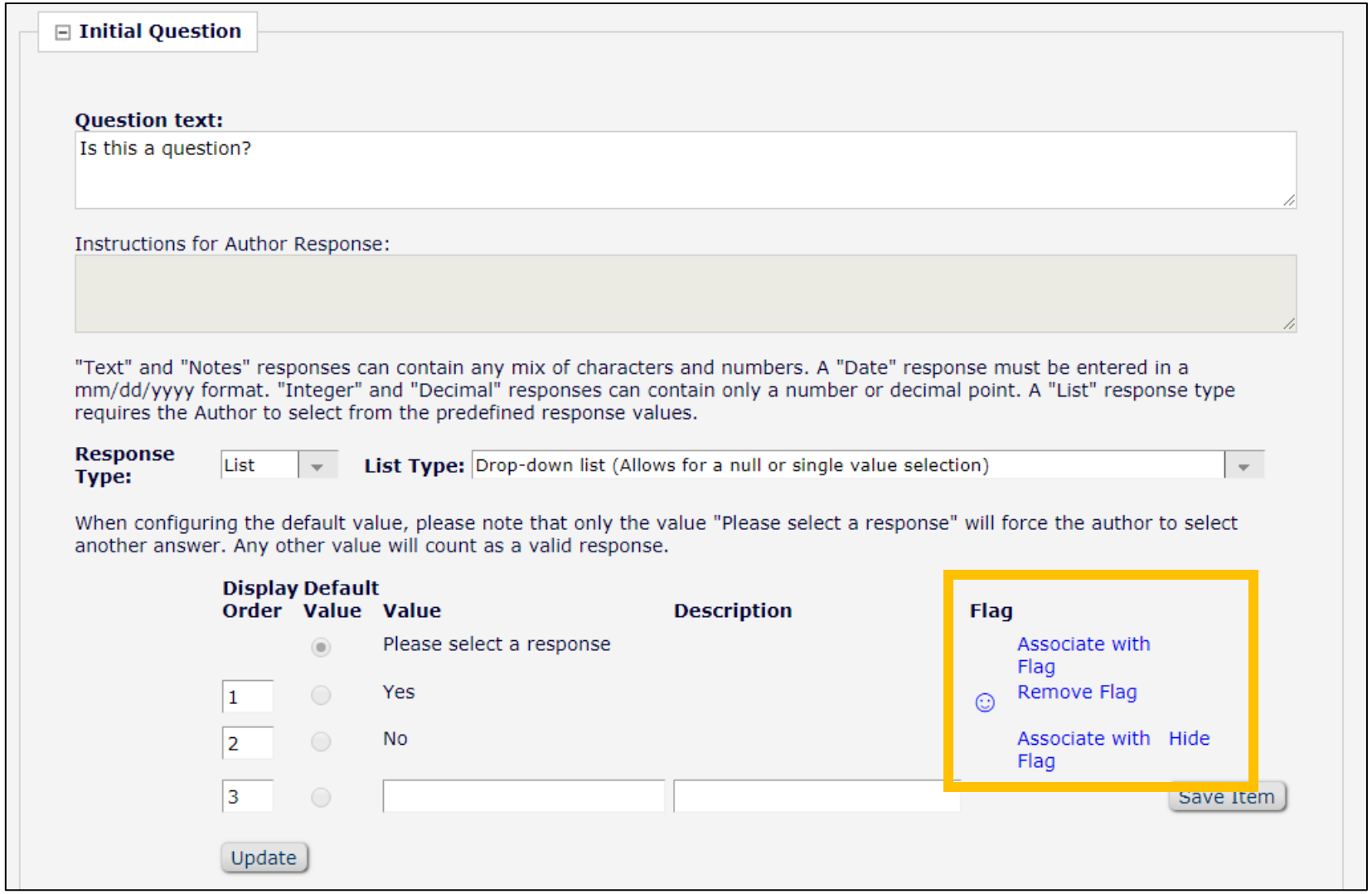
Add

Order	Description	Associated with Flag	Actions
1	Fast Track	▼ Expedited	Remove Edit
2	Press Release Candidate	* Supplement Article Possibility	Remove Edit

Custom Submission Flags

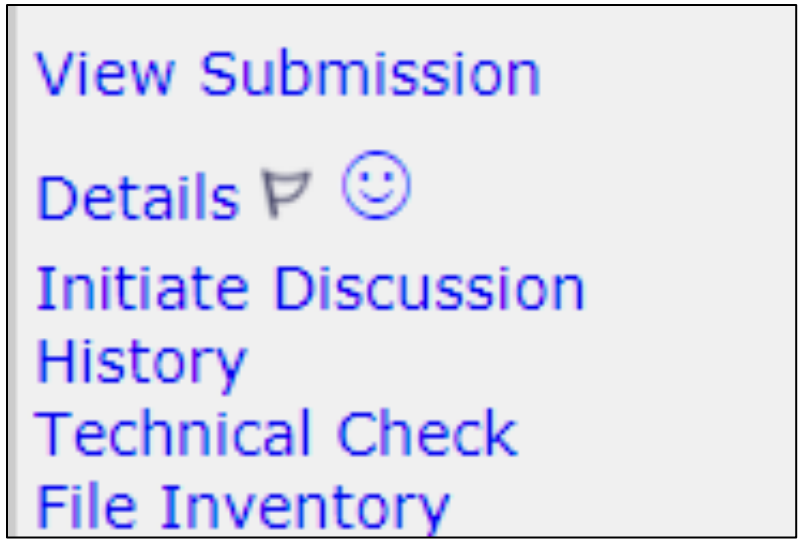


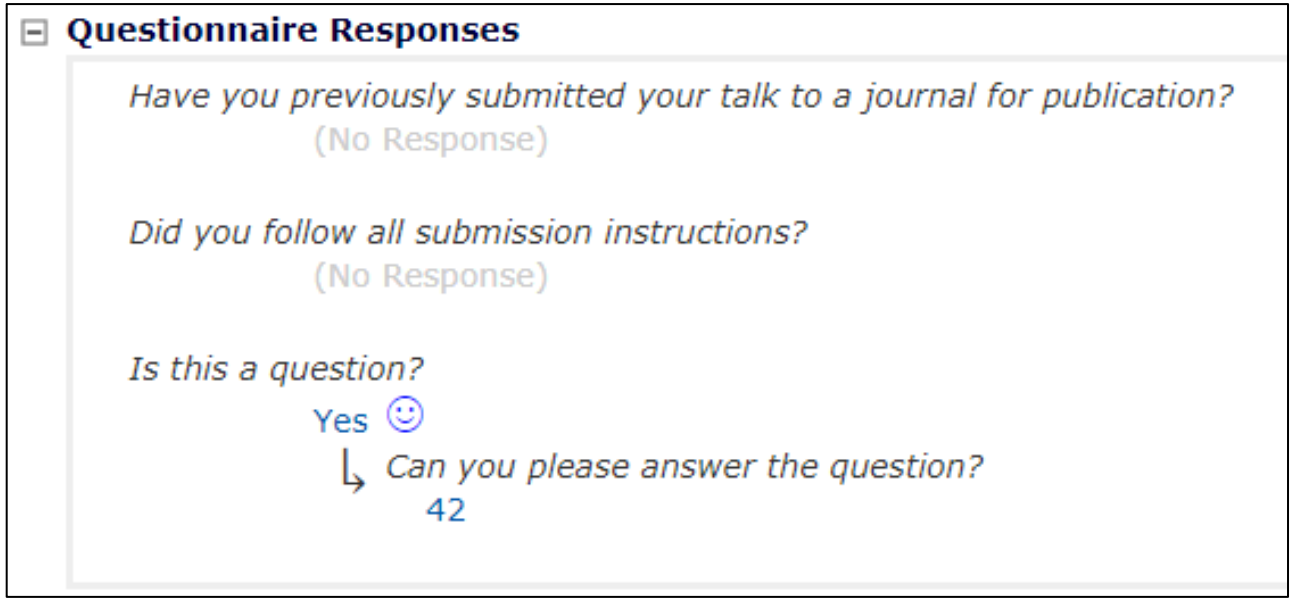
- Associate a Custom Submission flag with a custom Submission Question's response



Custom Submission Flags

- Flag will display next to Details link
- Flag will display next to answer on Details page



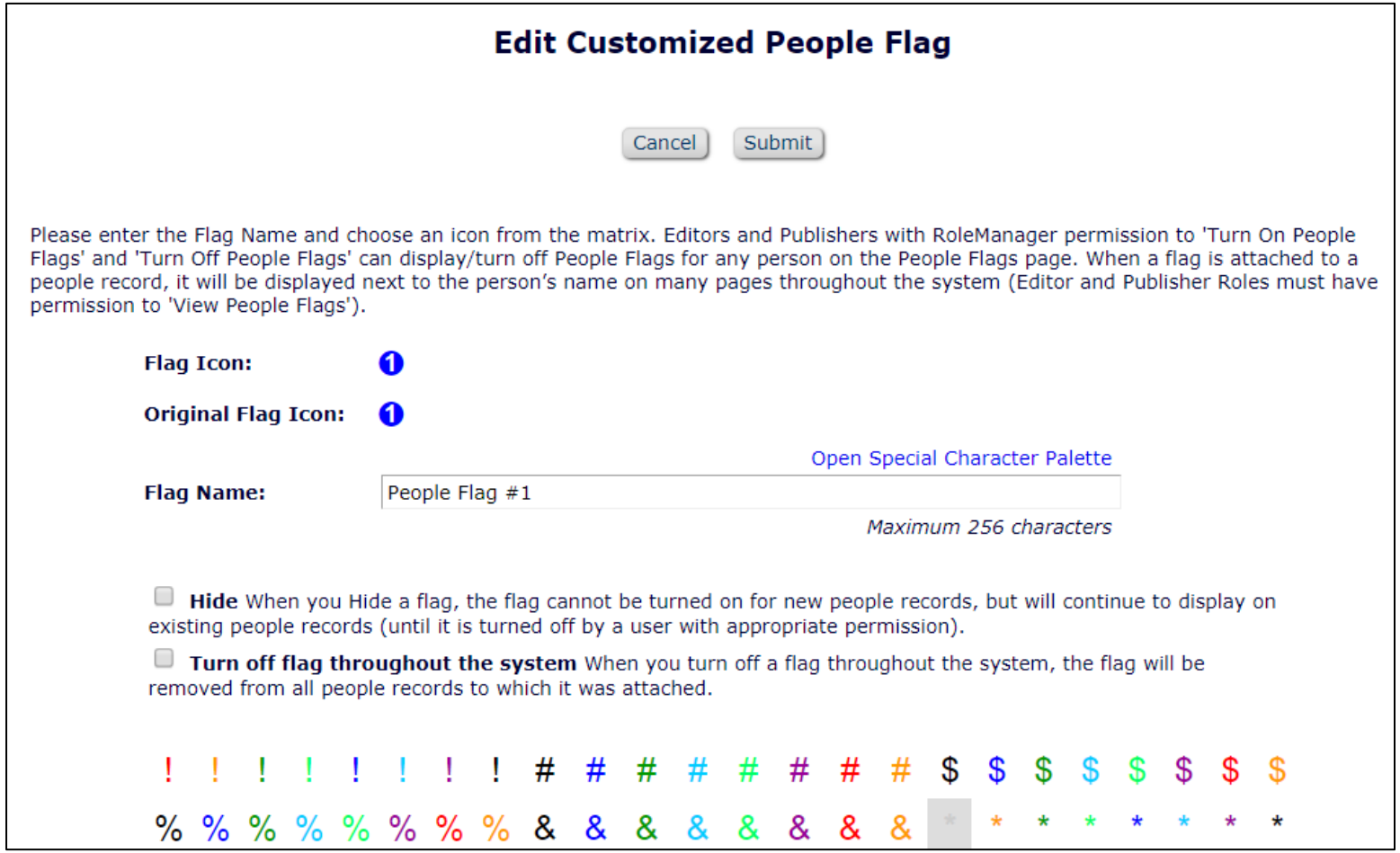


Custom People Flags

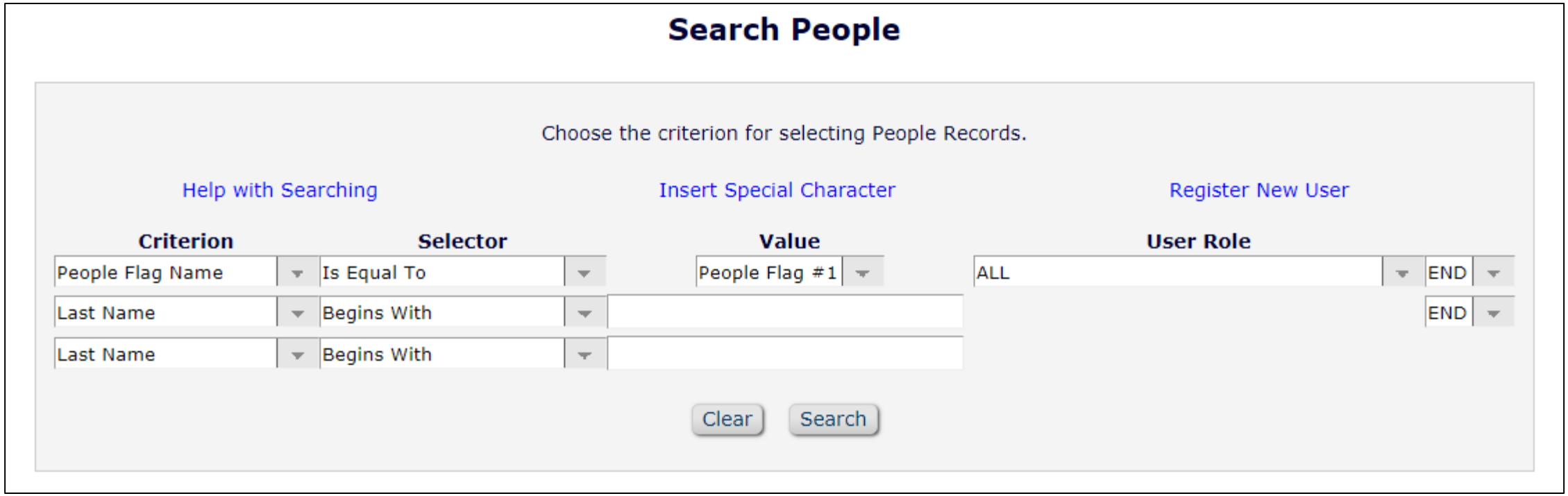
- Publications may configure their own flags for any number of uses
- Flags are set (turned on) on the 'People Flags' pop-up page, accessible from the Flag icon next to people names
- People Flags are visible to Editor or Publisher roles (by permission)

Custom People Flags

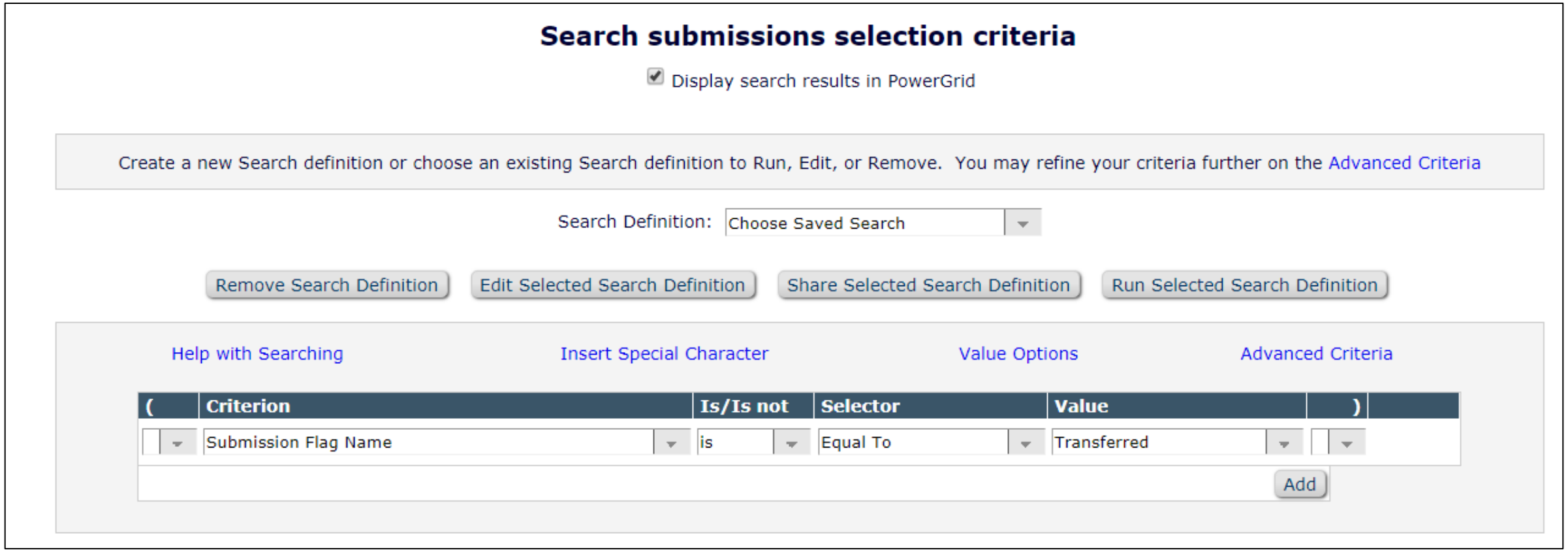
- People Flags and Submission Flags use the same set of flags, so it can be used for one or the other.



Search by Flag Name



Search by Flag Name



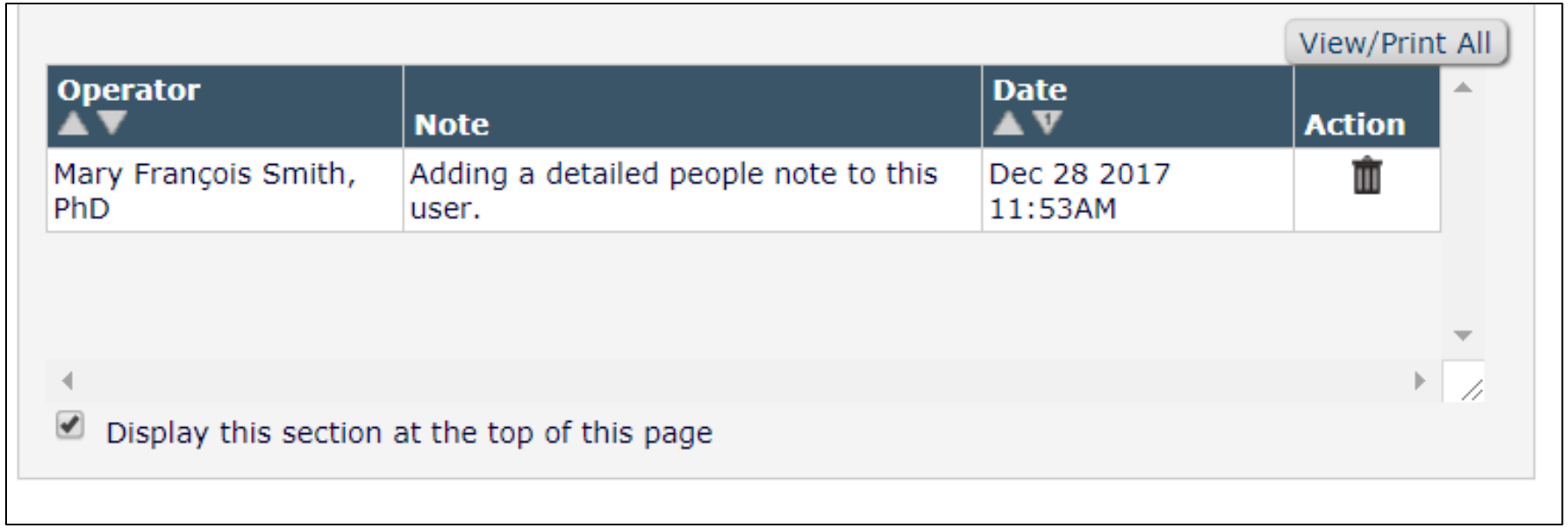
And a few more….

Detailed People Notes

- Allow Editors to use Detailed People Notes for further information on when a note was added and who added it

Detailed People Notes

- Choose to display at the top of the People – Update Information page



Detailed People Notes

- View Detailed People notes when inviting Reviewers (must have 'Detailed People Notes' available as Search Criterion in RoleManager)

Detailed People Notes

- View Detailed People notes when inviting Reviewers (must have 'Detailed People Notes' available as Search Criterion in RoleManager)

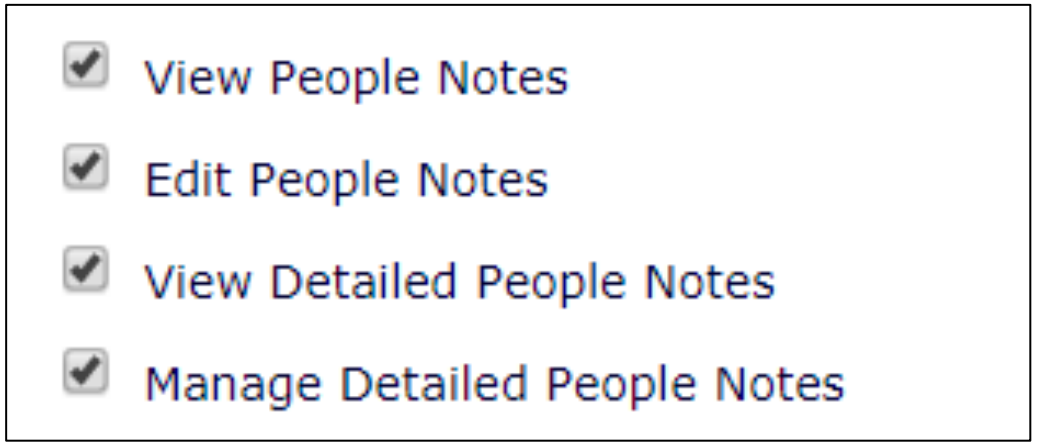
Select As Inv.	Asn.	Alt.	Prop.	Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics	
☐	☐	☐	☐	Buzz Aldrin (Reviewer)	No		Reviews in Progress:	0	Date Last Invited:	Mar 17 2016 10:17AM
							Completed Reviews:	1	Outstanding Invitations:	0
							Un-assigned After Agreeing:	0	Agreed:	1
							Terminated After Agreeing:	0	Declined:	0
							Last Review Agreed:	Mar 17 2016 10:24AM	Un-invited Before Agreeing:	0
							Last Review Completed:	Mar 17 2016 02:12PM	Terminated:	0
							Last Review Declined:	-	Total Invitations:	1
							Avg Days Outstanding:	0		
							Manuscript Rating:	0		
							Avg Review Rating:	0.0		

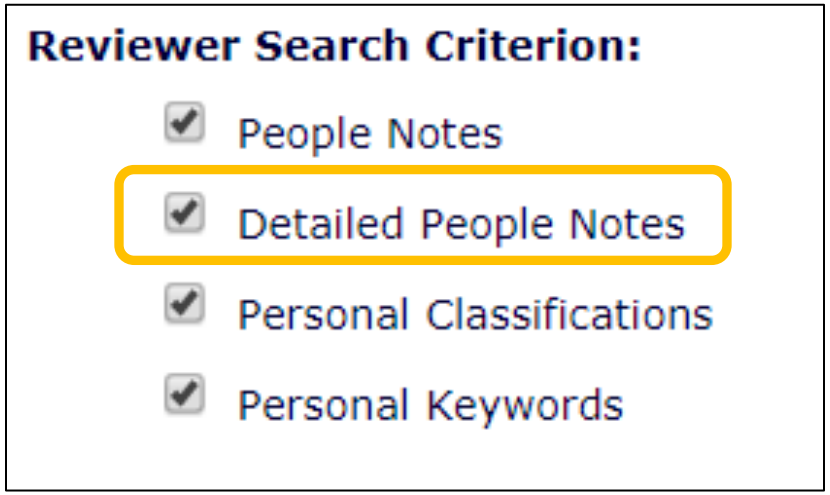
Detailed People Notes

View/Print All

Operator	Note	Date
Mary François Smith, PhD	Adding a second note for display purposes.	Dec 29 2017 03:09PM
Mary François Smith, PhD	Adding a detailed people note to this user.	Dec 28 2017 11:53AM

Detailed People Notes





Enable permission here:

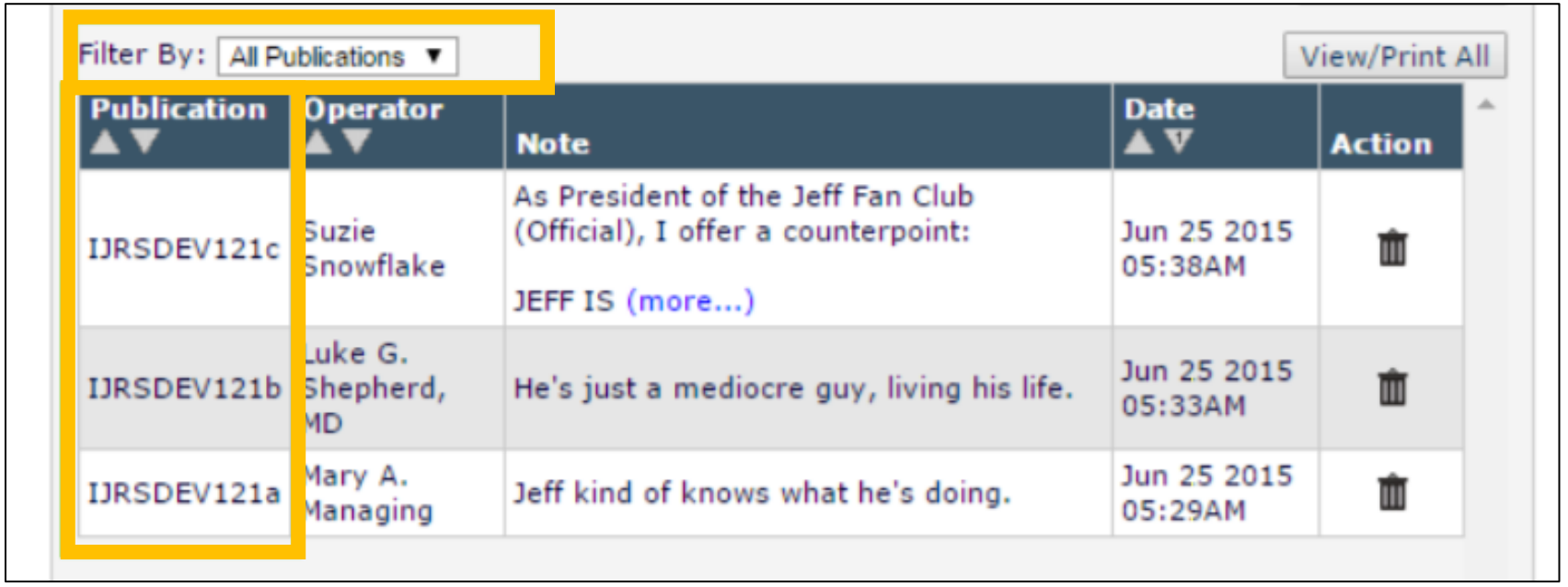
RoleManager → Select Editor Role → Viewing and Editing People Data section

Enable in Reviewer Search here:

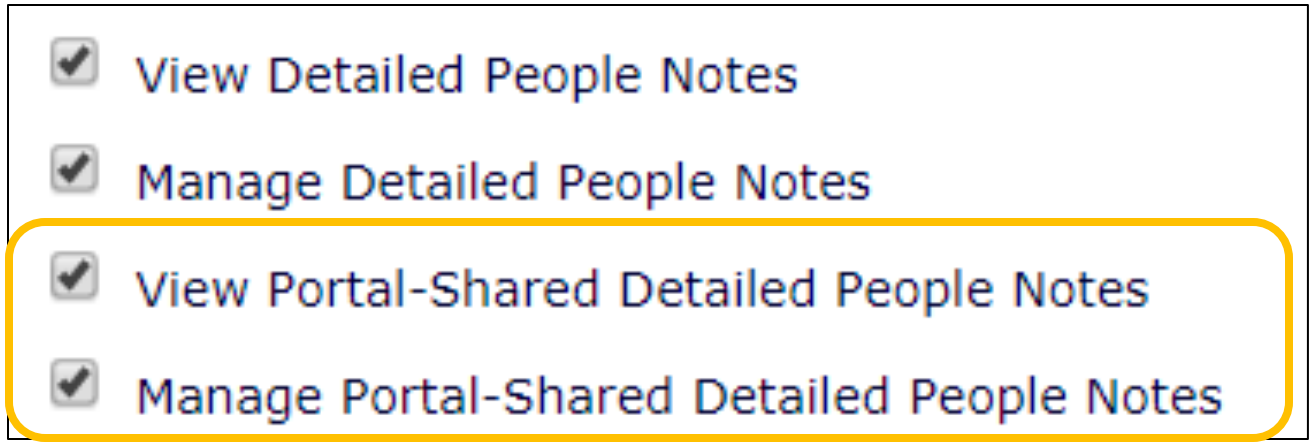
RoleManager → Select Editor Role → Reviewer Search Criterion

Detailed People Notes – People Sharing

- Publications in a People-Sharing Group can share Detailed People Notes
- When shared, notes can be filtered by publication



Detailed People Notes – People Sharing



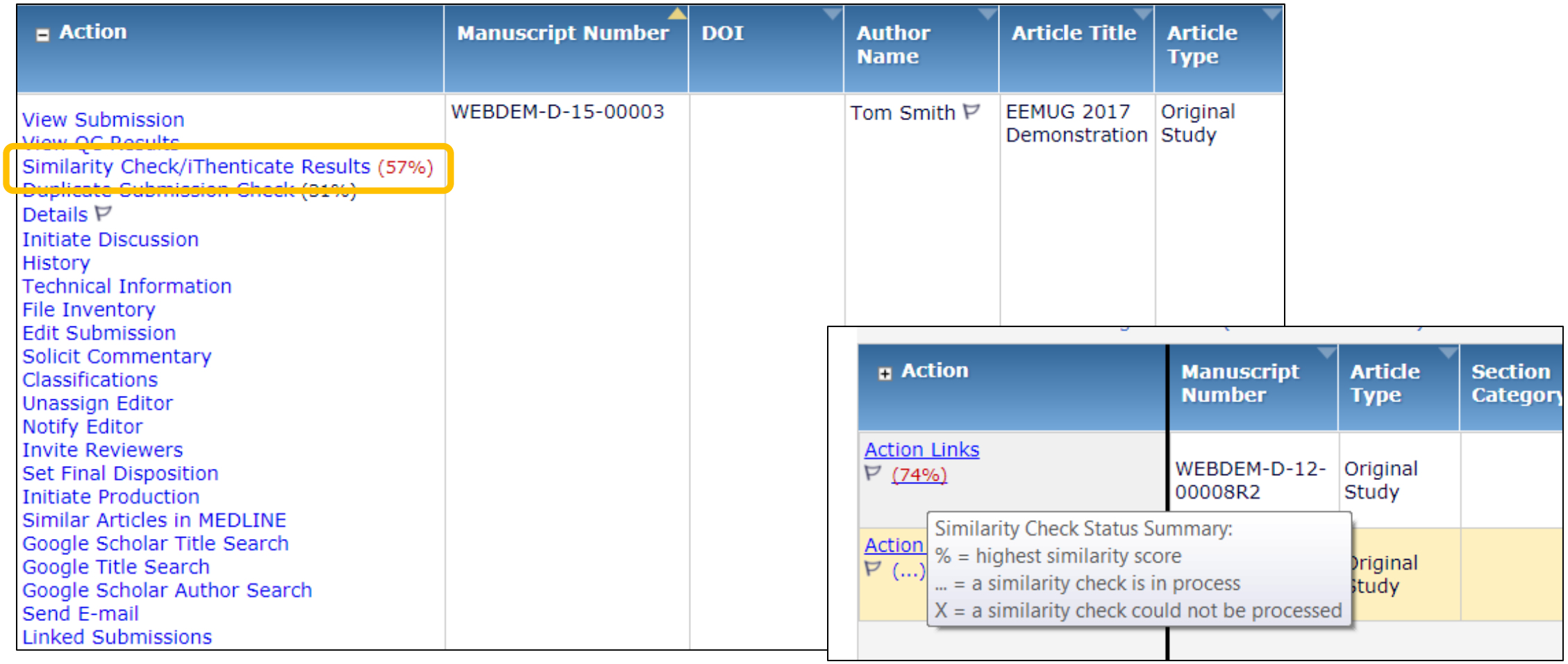
Enable the feature here:

RoleManager → Select Editor Role → Viewing and Editing People Data section

Similarity Check

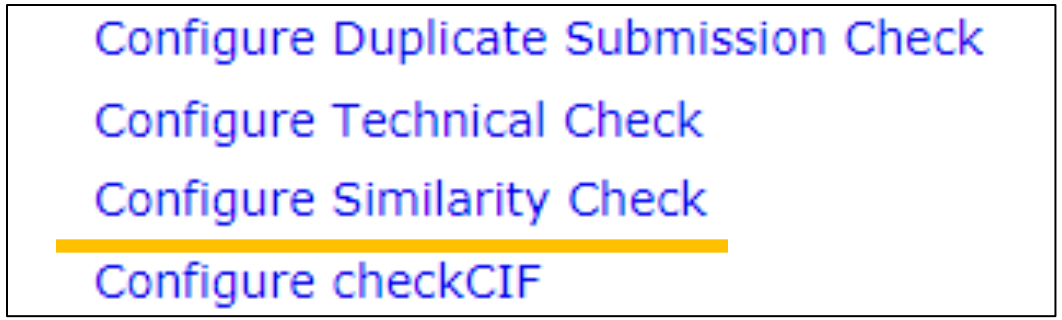
- Similarity Check powered by iThenticate from CrossRef
- Configure files to automatically go to iThenticate for similarity check (based on Article Type configuration):
  - On Initial Submission
  - On First Revision
  - On Final Disposition of Accept
- View results from folders such as:
  - New Submissions
  - Revised Submissions

Similarity Check



Similarity Check

- NOTE: You do need an account with CrossRef before this feature can be enabled. https://www.crossref.org/services/similarity-check/



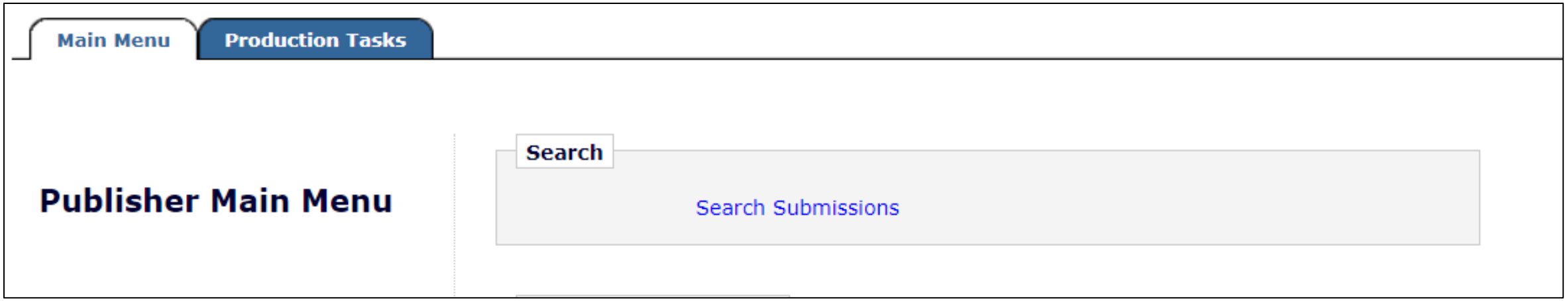
- Configure Similarity Score for your publication
- Configure any role permission to view

Configure the feature here:

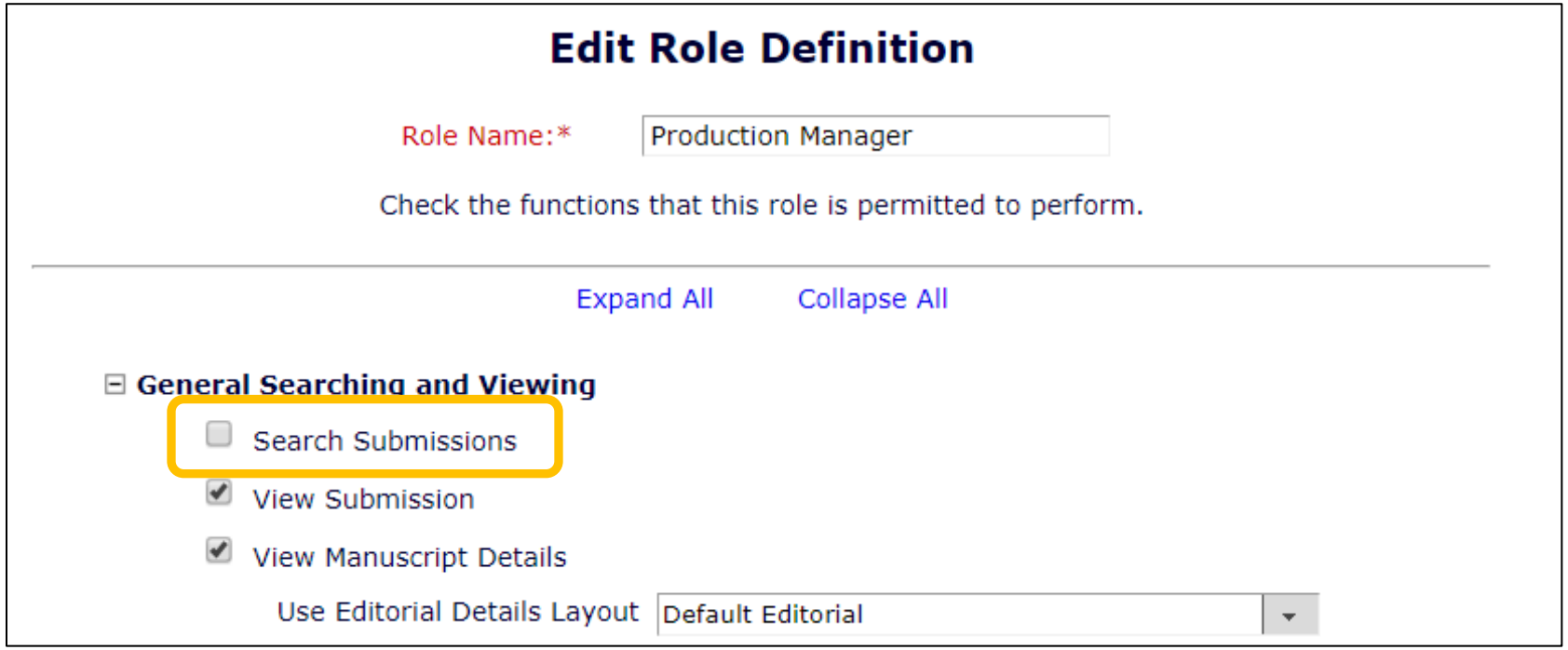
PolicyManager → Submission Policies → Configure Similarity Check

Search Submissions – Publisher Role

- Allow Publisher Roles to Search Submissions
- Added by popular demand, so make sure you take advantage of it!

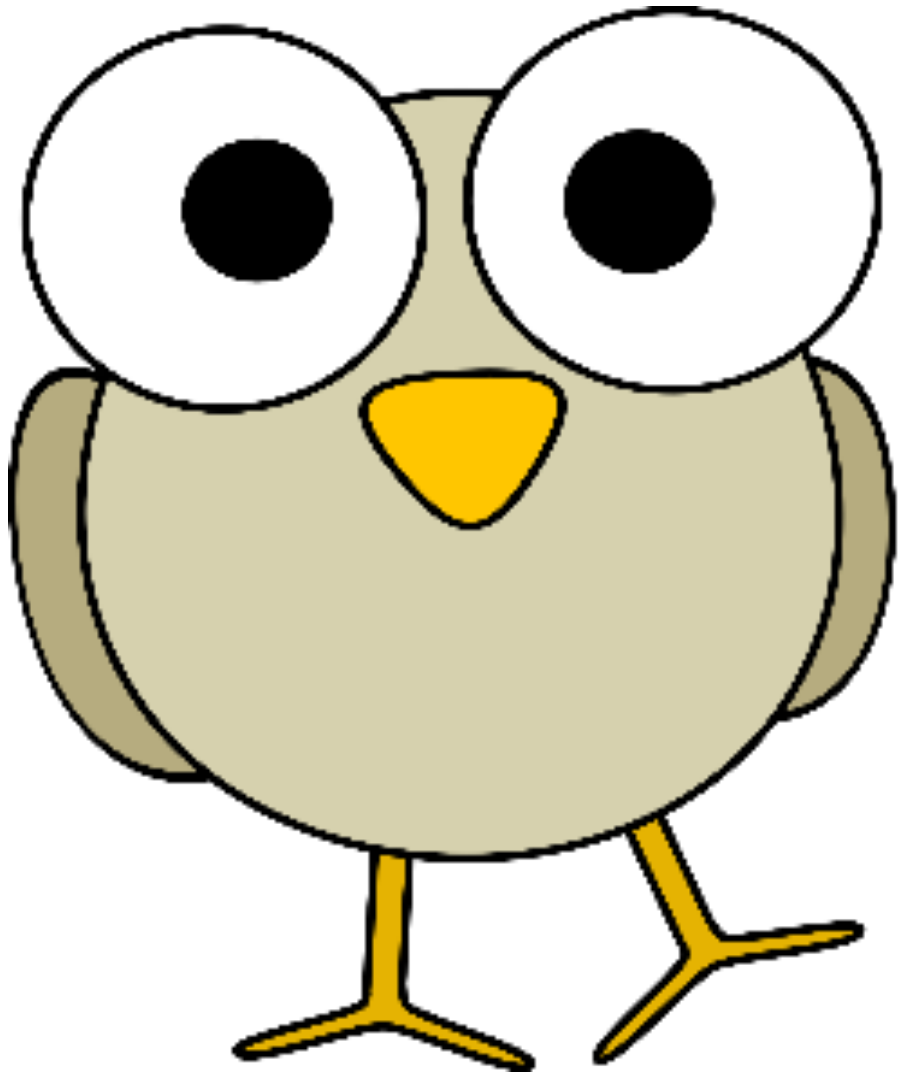


Search Submissions – Publisher Role



Enable the feature here:

RoleManager → Select Publisher Role → Search Submissions



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Aries systems

THANK YOU