Configuration Audit

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Agenda

- Audits: What it is and why you want it

- Audits: The Process

- Audits: Top things you can look at now

- Audits: How to get one

- Additional Resources

What the Audit Is

And Why You Want It!

Audits

- What it is
  - An Aries Client Services staff member reviews your site
  - Based on conversation with you, we identify features you may find useful
  - We don't make any configuration changes, but we offer tips and suggestions to assist you in getting the most out of EM/PM

- Why you want it
  - Established publications may overlook new features that would be useful
  - Newer publications may be more open to adapting workflows after using EM for a few months
  - It never hurts to have a second set of eyes to help you improve!

The Process

How we go about the audit of your publication

Process

- Publisher identifies the Publication

- Intro call held with key publication staff: 15-20 minutes

- In-depth interview (1 hour) held with the Managing Editor or the most detailed person and Aries staff
  - Currently, Dianne Gullo
  - Senior Account Coordinator
  - 12+ years with Aries

Process

- Following the call, a questionnaire is sent to gather some final data
  - Is there information you'd like to collect that you don't currently collect
  - Are there daily tasks that you'd like to change
- A clone of your site is made
- Dianne then does a full review of the cloned site, looking for areas for improvement
- Approximately 3-4 weeks later, a report is delivered with our findings and recommendations
- You can make any adjustments in the cloned site for your own testing!

Sample

Site Audit Report and Recommendations

Publisher: {Publisher}
Society: {Society Name (if applicable)}
{Journal/Publication} Name: {Pubication Name}
{Journal/Publication} Site: {SITE NAME}
Audit Conducted by: {Auditor}
Date Conducted: {QN YYYY}

Brief Summary

Overall, we are pleased to see {SITE NAME} is taking advantage of the numerous functions of Editorial Manager (EM). We

we did spot areas t

The following repo
and functions to c

In the process of c
https://www.edito
settings described

Please keep in min
any recommendati
these suggestions

Registration, Home and Login Page Suggestions

Update Home Page: The Home page currently lists information that may be out of date. Specifically, {describe outdated content}.

A best practice is to avoid using dates on the Home page unless a procedure is in place for someone to review it regularly for currency.

{SITE NAME}'s Aries Account Coordinator can make changes to the homepage, including any necessary changes to the HTML.

Match Colors and Banner with Publication Branding: The colors on the Home page and banner do not match the branding found on the publication Home page {insert URL}. Keeping the color

Top Things

Some of the Commonly Seen Areas to Improve

Update Banner Links

- Check your links regularly!
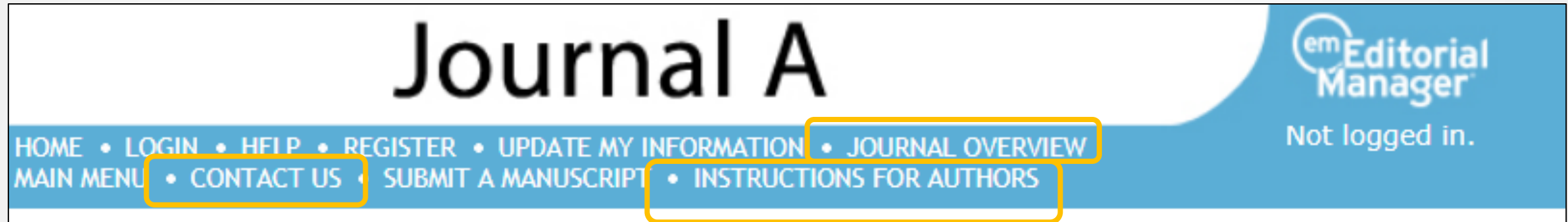
Update these links here:
PolicyManager → Edit Banner URLs

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!

- Updates instructions

- Review the information

- Contact your Account Coordinator for assistance

Check 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

Check 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

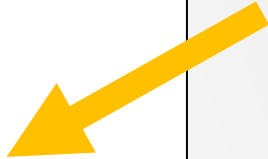☐ Allow sender to add Rich Text (HTML) formatting

Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

Letter Body: Insert Custom Merge Field | Insert System Merge Field

Dear %TITLE% %LAST_NAME%,

You have been invited to review a manuscript for %JOURNALFULLTITLE%.

I would be grateful if you would review a paper entitled "%ARTICLE_TITLE%" for this journal.

Custom Merge Fields

- Use Custom Merge Fields for frequently updated information

- Add Images that display in HTML letters

Edit Custom Merge Field

To define a custom merge field, enter a name for it and define the content. When you submit your definition, the system appends a prefix and suffix to the name you entered. When a letter that contains a custom merge field name is sent, the content is merged into the letter. (more...)

Cancel   Submit

Name:

OFFICEADDRESS

Maximum 256 alphanumeric characters and underscores allowed, no spaces

Content: Insert Image Insert Special Character

Journal of Aries Systems
200 Sutton Street
North Andover, Massachusetts 01845
USA
<img src="http://demobh141.edmgr.com/download.aspx?scheme=4&id=11">

Preview in HTML Format

Preview Content in HTML Format

This is how your custom merge field's content is expected to be rendered in an HTML letter. Note that the final result may vary slightly.

Close

Journal of Aries Systems
200 Sutton Street
North Andover, Massachusetts 01845
USA

Custom Merge Fields

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

Update Submission Instructions

- New Submission Interface available in version 14.1

- New Submission Interface will be turned on for everybody with 15.0 updgrade

- Update your Submission Instructions now!
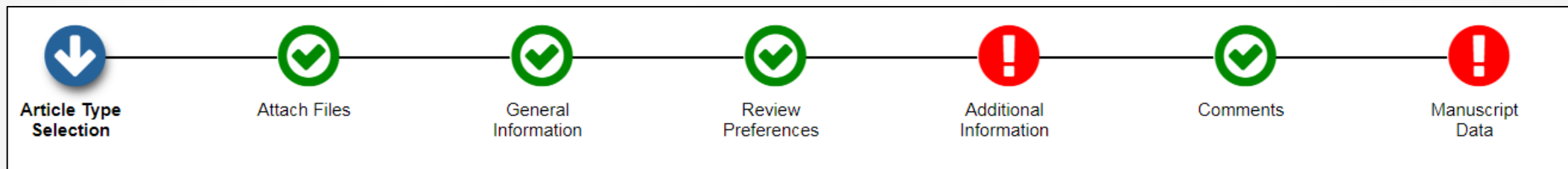
Update Submission Instructions
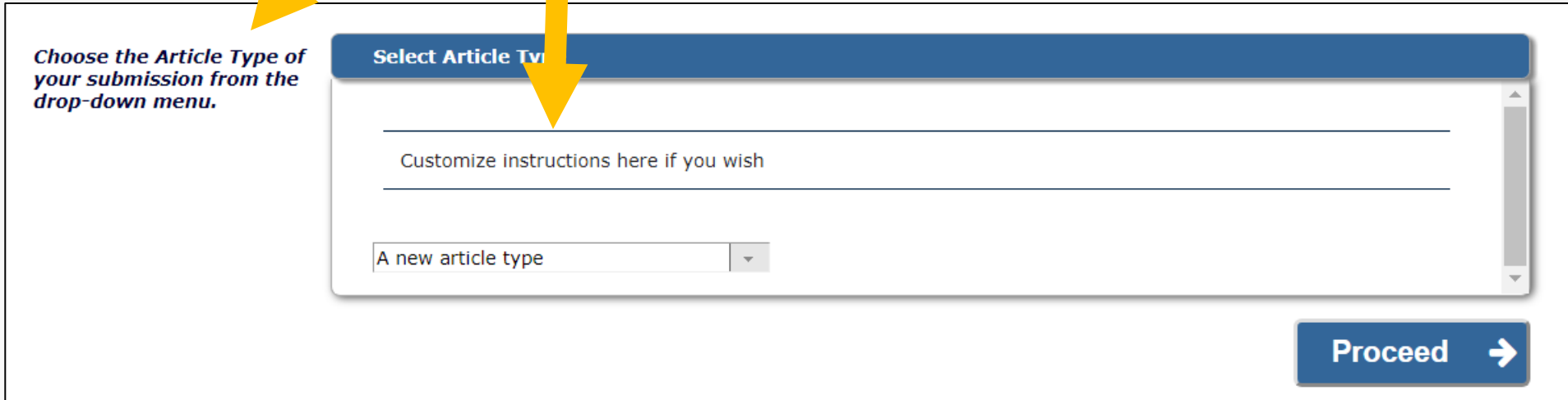
Instruction fields can be customized

Choose the Article Type of your submission from the drop-down menu.
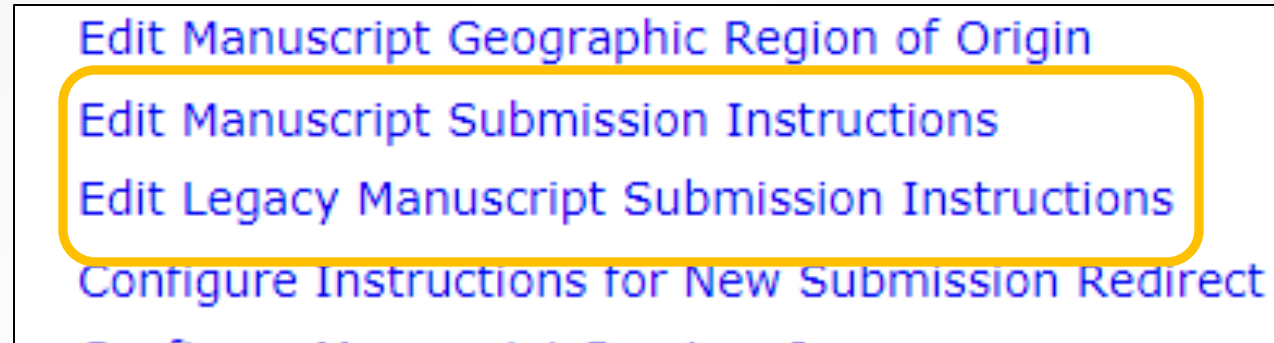
Select Article Ty

Customize instructions here if you wish

A new article type

Proceed →

Update Submission Instructions

Edit Manuscript Geographic Region of Origin

Edit Manuscript Submission Instructions

Edit Legacy Manuscript Submission Instructions

Configure Instructions for New Submission Redirect

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

Edit Submission Item Type

Insert Special Character

Item Type: Video

Maximum 256 characters

Item Type Family: Supplemental

☐ This Submission Item Type is a Companion File (not built into PDF)

Reviewer PDF Handling: Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)

Author/Editor PDF Handling: Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)

Important Note: If 'Build Hyperlink to the Item into the PDF(Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

URL/URI/External Resource Entry (in lieu of file upload) : Optional

☐ Display with automatic line numbering in PDF
☐ Include this Item Type for Artwork Quality Checking
☐ Do Not Unpack Archive files (.ZIP, .tar) of this 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

JS: Please rate on a scale of 1 to 10, the impact factor you feel your paper will have on advancing Tree disease knowledge. You can use .1 through .9 points as well. [DECIMAL]

JS: Please provide the email addresses of all authors who assisted with the paper [NOTES]

Character Count: 0

Limit 20000 characters

Custom submission question: Did you receive funding from any government agency? [DROP DOWN LIST]

Instructions

Please select a response

JS: Did you submit a copyright form? [RADIO BUTTON LIST]

- ● Please select a response
- ○ Yes - I have submitted a copyright form
- ○ No - I have not submitted a copyright form

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...)?

Q 1

Yes ▾

Was it for a:

Q 2

☑ 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:

Q 3

Character Count: 0

Limit 20000 characters

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
☑ Display
Help Text:
[   ]

Transmittal Form ⓘ
☑ 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]

Author and Submission Questionnaires

Set "Additional Information" Preferences:

| Designate Submission Questionnaire: | EEMUG Questionnaire | ▼ | EEMUG Questionnaire | ▼ |
| Designate Author Questionnaire: | Author Questionnaire | ▼ | Friday questionnaire | ▼ |

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

Set Other Author Parameters

You may request additional information about Other Authors entered on the **Add/Edit/Remove Authors** manuscript submission step. Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'. If your Publication chooses to require Other Author verification or registration for any Article Type, you may want to select E-mail or other address fields as required for all Other Authors so that you will have a means of contacting Other Authors. (more...)

Set "Zip or Postal Code" Text Entry Box Preference:	Optional
Set "Country" Preference:	Optional
Set "Contributor Roles" Preference:	Display
Set "Deceased Status" Checkbox Preference:	Hidden
Set "Equal Contribution Status" Checkbox Preference:	Hidden

Configure it to "Display":

PolicyManager → Set Other Author Parameters

CRediT Contributor Roles

All Authors Parameters

Contributor Roles: Optional ▼

When Contributor Roles are set to "Display" on the *Set Other Author Parameters* page, this option allows you to specify whether they are "Optional" or "Required" for this Article Type.

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 Open 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

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

Editor Parameters

New and Revised Submissions

Editor Assignment Chain Template:

Default Chain ▾

Select an Assignment Chain Template to allow the entire Editor Chain to be assigned in one action, not just the first Editor.

Enable the feature here:

PolicyManager → Edit Article Types

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)

Detailed People Notes

Enable permission here:
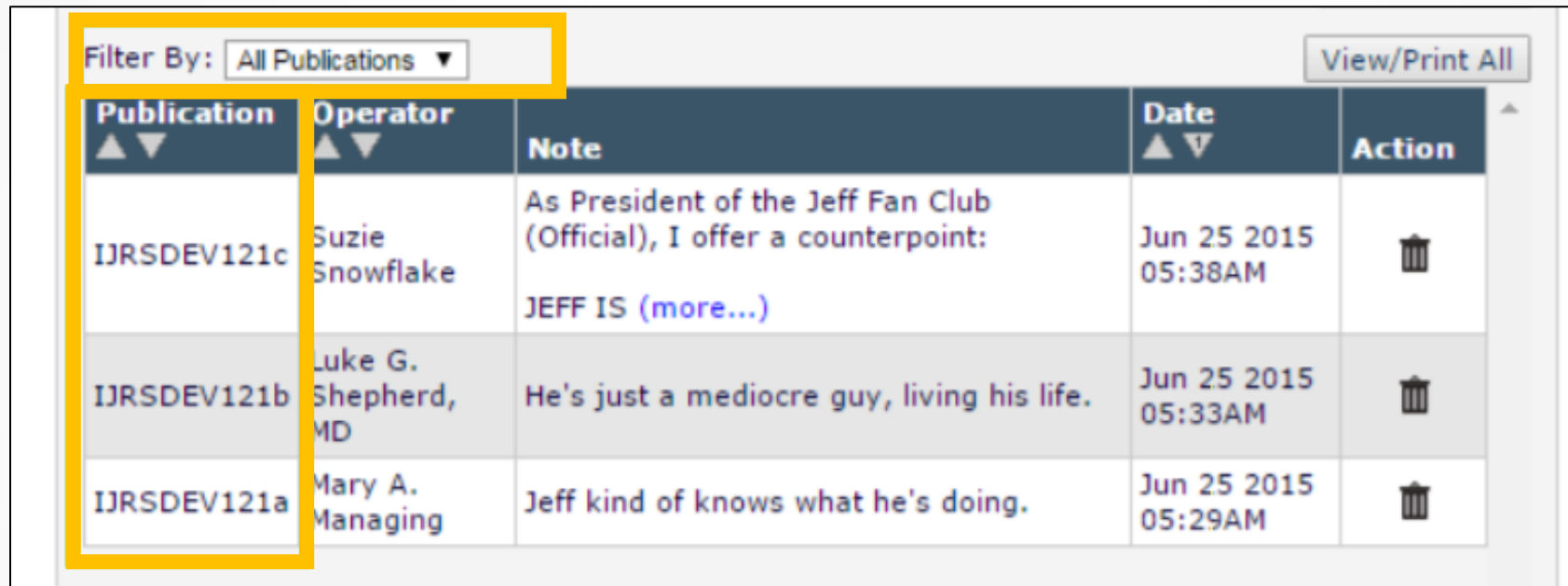
    RoleManager → Select Editor Role → Viewing and Editing People
    Data section

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

Custom Review Questions

- More useful than Manuscript Rating Questions

- Gather information for Reporting

- Display on Editor Form

- Can be included in merge fields

* Would you like to request CME credit for this review?

Yes ▼

Response required
How many credits are you requesting? (Limit 1 to 10 Characters)

Character Count: 0

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

⊟ **Reviewer and Editor Form Policies**

Manuscript Rating Question Configuration
Edit Manuscript Rating Questions
Overall Manuscript Rating Question Settings
Edit Manuscript Rating Instructions

Reviewer Recommendation Policies
Edit Reviewer Recommendation Terms
Create/Edit Custom Review Questions
Create/Edit Review Forms
Match Review Forms to Article Types and Reviewer Roles
Set Pending Assignments Deep Link Expiration
Set Reviewer Recommendation Deep Link Expiration

Instructions for Reviewers

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

Edit Review Form

Review Form Name: Default Review Form

☐ Hide - When you **Hide** a Reviewer Form, the form will be deactivated (not available for use with any Article Types).

Reviewer Instructions:

☑ **Display Reviewer Instructions in popup**   Insert Special Character

Configurable text.

Instructions <B>appear here....</B>

<img src="http://www.editorialmanager.com/homepage/images/header-logonew.gif" alt="" width="154" height="22" border="0" usemap="#ba1" id="ba1" name="ba1">

Instructions for Reviewers

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**

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

* Description: Letter regarding EEMUG Prep

From: Aries Marketing

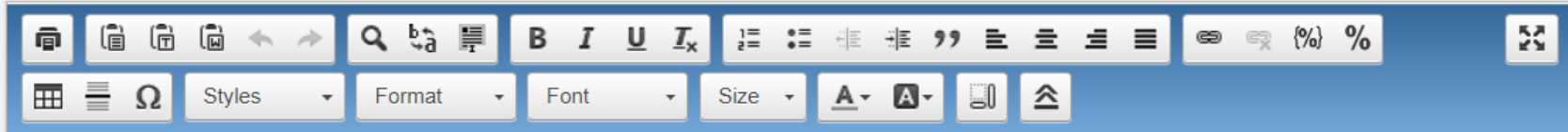To: B. Hopkins

Letter Subject: Are you ready for EEMUG?

📎 Attachments: Add/Change Attachments

Letter Contents: Open in New Window

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

A new user has registered – [EMID:8f4da3954eefd0cd]

Create an E-mail Drop Box

Configure Email Import

A user who receives replies, outside the system, to system-generated Emails may add them to the appropriate Correspondence History by forwarding them to the 'Drop-Box' address displayed below, once submitted.

If you generate and submit a new address, any previous address is made inactive and cannot be used again (this allows you to retire an address that has become a target for spam Emails). Clear the address and submit the page to turn off the ability to import mail into the publication.

You must submit this page for any changes to the Drop-Box Address to take effect. You should inform anyone who forwards mail in this way immediately of any changes to this address.

Set 'Drop-Box' Email Address:

em.demobh102-6582447cdc8487bf@editorialmanager.com

[Generate New Address]   [Clear Address]

Configure Drop Box Address here:

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

Create an E-mail Drop Box

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 Duplicate Submission Check

Configure Technical Check

Configure Similarity Check
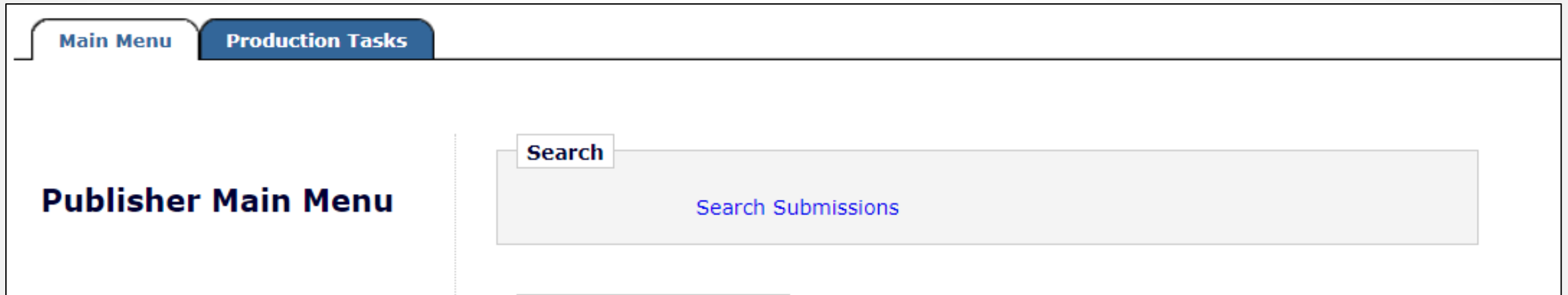
Configure checkCIF

- 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

How do you get one?

- Contact your Account Coordinator
- Contact your Account Manager
- Speak with one of us here

Just Ask!

Resources Available for Reference

- Release Notes and Release Digests
  - https://www.ariessys.com/for-current-customers/feature-newer/
- EM Help
  - http://www.editorialmanager.com/robohelp/14.1/index.htm#t=Editorial_Manager_Help_System.htm
  - Or from Help link on EM Banner – updated with each release
- Aries Video Library
  - https://www.ariessys.com/views-and-press/resources/video-library/
- Your Aries Account Coordinator