

Welcome to EEMUG 2018

em

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pm

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



Aries Systems
Corporation
200 Sutton Street, North Andover, MA
01845 USA
T: +1 978-975-7570 F: +1 978-975-3811
info@ariessys.com www.ariessys.com

Site Audit Report and Recommendations

Publisher: {Publisher}
Society: {Society Name (if applicable)}
{Journal/Publication} Name: {Publication 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 co

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

Please keep in min
any recommendat
[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](#).

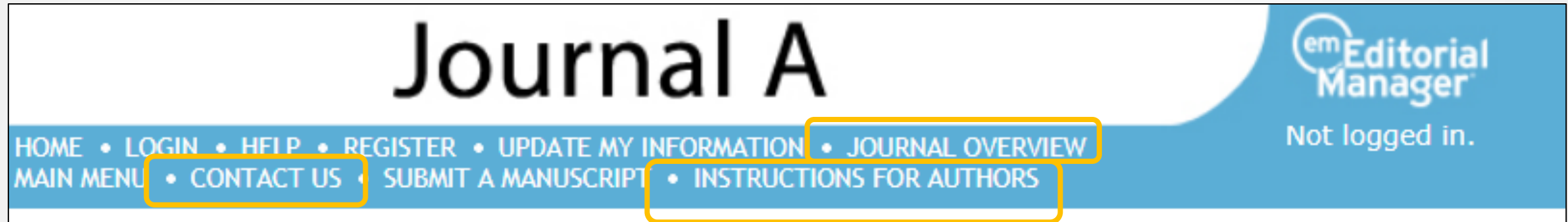
Match Colors and Banner with Publication Branding: The colors on the Home page and banner do not match the branding found on the publication Home page [\[insert URL\]](#). Keeping the color

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

Contact Us

Journal Overview

Update Main Pages

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

- Contact your Account Coordinator for assistance



The screenshot shows the Editorial Manager interface for the Journal of Demonstration. At the top, there is a navigation bar with links for HOME, LOGIN, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. The Editorial Manager logo is on the right, along with a language dropdown set to English and a play button icon. Below the navigation bar, a dark blue banner reads "Welcome to Editorial Manager® for THE JOURNAL OF DEMONSTRATION". A central light blue box contains a login form with fields for Username and Password, and buttons for Author Login, Reviewer Login, Editor Login, and Publisher Login. It also includes an ORCID login option and links for Send Login Details, Register Now, Login Help, and Manuscript Services. A footer section contains four buttons: Instructions for Authors, Instructions for Reviewers, About the Journal, and Contact Editorial Office. Below this, there are detailed instructions for first-time users, repeat users, authors, reviewers, and how to change user information.

JOURNAL OF DEMONSTRATION Editorial Manager
Not logged in. English

HOME • LOGIN • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Welcome to Editorial Manager® for
THE JOURNAL OF DEMONSTRATION

Insert Special Character

Please Enter the Following

Username:

Password:

Author Login Reviewer Login Editor Login Publisher Login

Or Login via:  What is ORCID?

[Send Login Details](#) [Register Now](#) [Login Help](#)  [Manuscript Services](#)

Software Copyright © 2018 Aries Systems Corporation. [Privacy Policy](#)

Instructions for Authors Instructions for Reviewers About the Journal Contact Editorial Office

First-time users: Please click on the word "Register" in the navigation bar at the top of the page and enter the requested information. Upon successful registration, you will be sent an e-mail with instructions to verify your registration. **NOTE:** If you received an e-mail from us with an assigned user ID and password, DO NOT REGISTER AGAIN. Simply use that information to login. Usernames and passwords may be changed after registration (see instructions below).

Repeat users: Please click the "Login" button from the menu above and proceed as appropriate.

Authors: Please click the "Login" button from the menu above and login to the system as "Author." You may then submit your manuscript and track its progress through the system.

Reviewers: Please click the "Login" button from the menu above and login to the system as "Reviewer." You may then view and/or download manuscripts assigned to you for review or submit your comments to the editor and the authors.

To change your username and/or password: Once you are registered, you may change your contact information, username and/or password at any time. Simply log in to the system and click on "Update My Information" in the navigation bar at the top of the page.

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!

Allow sender to add Rich Text (HTML) formatting

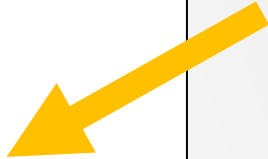
Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

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.



Update letters here:

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

Update Merge Fields

- Search
- View description

Insert System Merge Fields

You can drag and drop merge fields from here to the letter Subject or Body. [\(more...\)](#)

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

- %ABSTRACT%
Abstract of the manuscript
- %ACCEPT_EDITOR_INVITATION%
- %ACCEPT_INVITATION%
- %ACCEPT_REVIEW_INVITATION%
- %ACCEPT_REVIEW_INVITATION_AND_VIEW_REVIEWER_PDF%
- %ACTUAL_TRANSFER_PUBLICATION_TITLE%
- %ADDRESS%
- %ADDRESS1%
- %ADDRESS2%

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...](#))

Name:

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

[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.

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



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%,

to review a manuscript for %JOURNALFULLTITLE%.

you would review a paper entitled "%ARTICLE_TITLE%" for this journal.

Insert Custom Merge Field

You can drag and drop merge fields from here to the letter Subject or Body. [\(more...\)](#)

Expand All | Collapse All

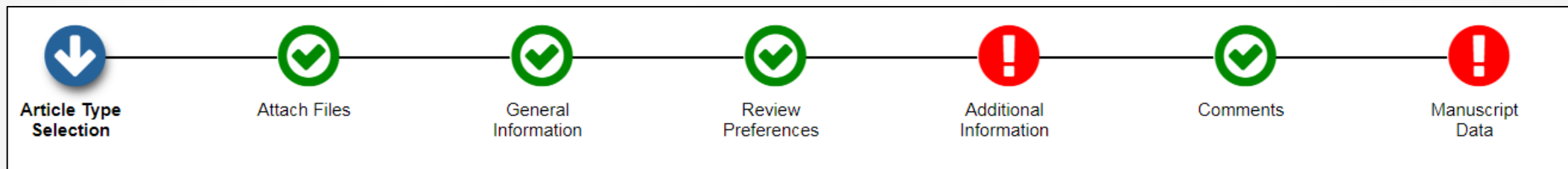
%CUSTOM_OFFICEADDRESS%

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 upgrade
- Update your Submission Instructions now!



Update Submission Instructions

Instruction fields can be customized

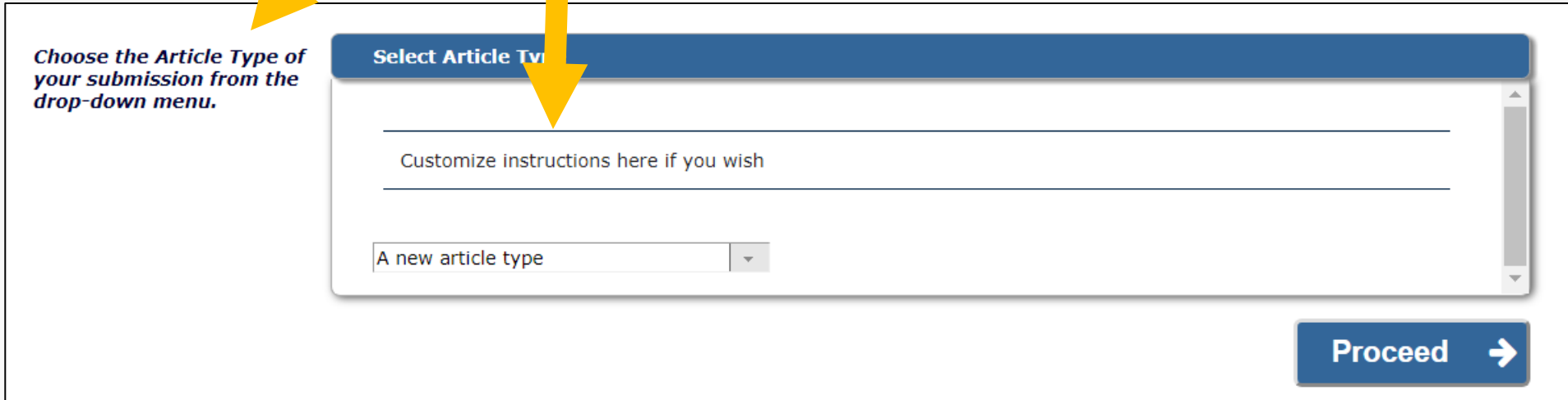
Choose the Article Type of your submission from the drop-down menu.

Select Article Type

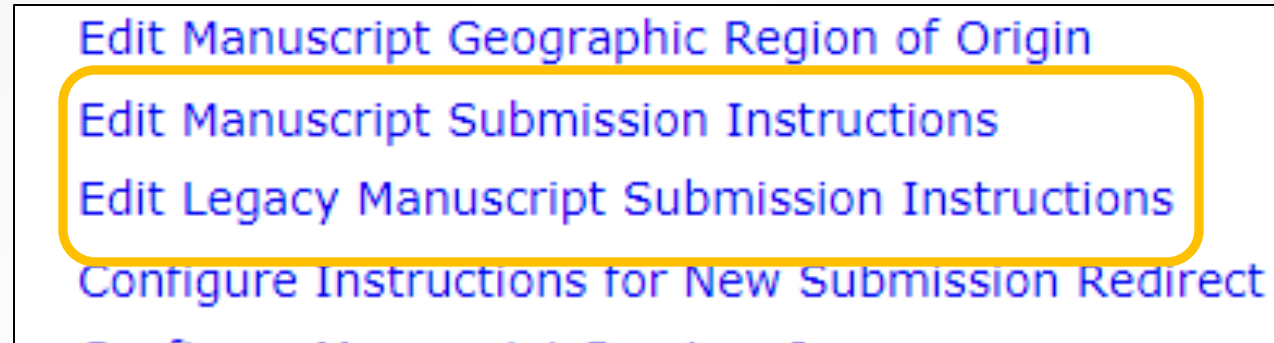
Customize instructions here if you wish

A new article type

Proceed →

A screenshot of a web form for updating submission instructions. A yellow callout box at the top contains the text "Instruction fields can be customized". Two yellow arrows point from this box to the form. The form has a blue header bar with the text "Select Article Type". Below the header is a large text area with the placeholder text "Customize instructions here if you wish". At the bottom of the form is a dropdown menu with the text "A new article type" and a right-pointing arrow. In the bottom right corner of the form is a blue button with the text "Proceed" and a right-pointing arrow.

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

Please provide any additional items.

[Insert Special Character](#)

Select Item Type
Video

Description
Video

Delivery Method
 Online Web System URL/URI/External Resource

URL/URI/External Resource Location:
http://

Please select http://, https:// or ftp://, then type in the remainder of the web address (e.g. www.targetsite.edu/datasets/dataset1) and click the 'Preview' button to ensure that the address you entered navigates to the correct location. Once you are satisfied with your entry, click the 'Attach This Information' button.

External File Type

Edit Submission Item Type

[Insert Special Character](#)

Item Type:
Maximum 256 characters

Item Type Family:

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

Reviewer PDF Handling

Author/Editor PDF Handling

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) :

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


[Insert Special Character](#)

Questionnaire

JS: Where is your home location? [TEXT]

Answer Required: Character Count: 0 Limit 200 characters

JS: What is the date you started your paper? [DATE]



JS: How many pages are in your paper? [INTEGER]

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

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

JS: Please select your Tree Base Knowledge [CHECKBOX LIST]

Instructions

Answer

Required:

- Maple
- Oak
- Willow
- Mountain Ash
- Birch
- Plum
- Wild Cherry
- Fruit Trees
- Conifers

Please select no fewer than 1 value(s) and no more than 98 value(s).

Select All Clear All

JS: Select the Tree Diseases you have knowledge about [SELECTOR BOX LIST]

Instructions

Answer

Required:

- Fireblight
- Borers
- Rust
- Bacterial Duct

Please select no fewer than 1 value(s) and no more than 79 value(s).

Select All Clear All

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...)?

Please select a response

Q 1

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

Q 2

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

Q 1

Was it for a:

- Grant
- Consulting Fee
- Support for travel
- Payment for writing or reviewing the manuscript

Select All Clear All

Q 2

Please provide a description of the support received:

Character Count: 0

Limit
20000
characters

Q 3

Author and Submission Questionnaires

PolicyManager Main Menu

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

- [+ Registration and Login Policies](#)
- [+ Status Policies](#)
- [+ Submission Policies](#)
- [- Questionnaire Policies](#)
 - [Create Custom Questions](#)
 - [Create Questionnaires](#)
 - [Edit Co-Author Questionnaire Instructions](#)

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

PolicyManager Main Menu

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

- [+ Registration and Login Policies](#)
- [+ Status Policies](#)
- [+ Submission Policies](#)
- [- Questionnaire Policies](#)
 - [Create Custom Questions](#)
 - [Create Questionnaires](#)
 - [Edit Co-Author Questionnaire Instructions](#)

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: (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 | Field | Include in Merge | Actions |
|--------------------------------|---|--------------------|--------------------------|--------------------------|------------------|------------------------|
| <input type="text" value="1"/> | Have you previously submitted your talk to a journal for publication? | | <input type="checkbox"/> | <input type="checkbox"/> | | Remove |
| <input type="text" value="2"/> | Did you follow all submission instructions? | | <input type="checkbox"/> | <input type="checkbox"/> | | Remove |
| <input type="text" value="3"/> | § Is this a question? | | <input type="checkbox"/> | <input type="checkbox"/> | | Remove |

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

Contributor Roles   [Instructions](#)

- Conceptualization
- Data curation
- Formal analysis
- Funding acquisition
- Investigation
- Methodology
- Project administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing – original draft
- Writing – review & editing

Enter Author Details 

    [Insert Special Characters](#)

Title

Given/First Name*

Middle Name

Family/Last Name*

Academic Degree(s)

Affiliation

E-mail Address

ORCID [Fetch](#)

[What is ORCID?](#)

Institution

Department


Street Address

City

State*

Zip or Postal Code

Country

Contributor Roles  [Click here to select roles](#)

This is the corresponding author



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: [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 | <p>Insert Special Character</p> <p>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.</p> <p>You may select one or more Contributor Roles for each Author of a submission.</p> <p>If Contributor Roles are required for your</p> <p>View Default Instructions Revert to Default Instructions</p> |

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: ▼

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

The image shows a screenshot of a web application interface for entering funding source details. The main window is titled "Enter Funding Source Details" and contains the following fields:

- Find a Funder:
- Award Number:
- Grant Recipient:

Below the "Find a Funder" field, there is a dropdown menu showing a list of standardized funding institution names. The search term "Univers" is entered in the field, and the dropdown list includes the following entries:

- University of Maryland Foundation (US)
- Universal Health Care Foundation of Connecticut (US)
- University Film and Video Association (US)
- American Association of University Women (US)
- American Institute for Contemporary German Studies (US)
- Lilly Library, Indiana University Bloomington (US)
- Center for Environmental Journalism, University of Colorado Boulder (US)
- Center for Law, Society, and Culture, Indiana University Bloomington (US)
- Center for the Humanities, Wesleyan University (US)
- Center for the Study of Religion, Princeton University (US)

At the bottom of the form, there are two buttons: "Back" and "Save & Submit".

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

Assign Editor Chain

Title: Demonstration for EEMUG 2018

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

Define Initial Editor Assignment Chain


| | Step | Role | Editor | Assignment Letter |
|--|----------|------------------|---------------|--------------------------------|
| | Editor 1 | Associate Editor | Dextrous Anne | None Customize |
| | Editor 2 | Editor-in-Chief | | None Customize |

AJPS-Editorial Assistant [Add to Chain](#)



[Cancel](#) [Create Chain and Send Letters](#)

Editor Chains and Alternates

- Swap Editors mid-chain by clicking Unassign Editor link

| Action | Manuscript Number | Article Type | Article Title | Author Name |
|---|-------------------|--------------------|------------------------------|-------------------------|
| View Submission Details ▾ History Classifications Unassign Editor ←  File Inventory Edit Submission Invite Reviewers Solicit Commentary Notify Editor Set Final Disposition Initiate Production Google Scholar Title Search | DEMO-100-84 | A new article type | Demonstration for EEMUG 2018 | Mary François Smith PhD |

Current Editor Assignment Chain



| | Step | Assigned Editor | Role | New Editor |
|---|----------|--|--------------------|-------------------------|
|  | Editor 1 | Anne B. Dextrous MD Associate Editor | Associate Editor ▾ | <input type="text"/> ▾ |
|  | Editor 2 | Edward Editor MD Editor-in-Chief | Editor-in-Chief ▾ | <input type="text"/> ▾ |
|  | Editor 3 | Arthur Author Staff Editor | Staff Editor ▾ | No users have this Role |

Editor Chains and Alternates

Define Editor Assignment Chain Templates



Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type creates an initial Editor chain for that Article Type. The Editor Assignment Chain Template is a series of Editor Roles arranged in a sequence. The Editor Assignment Chain Template is used to notify the Editor Roles in the chain when an Article is selected for inclusion, and all but the last Editor in the chain is notified.

View Editor Assignment Chain Template Details [X]

  **Default Chain**

| Step | Editor Role | Assignment Letter | Method |
|----------|------------------|-------------------|--------|
| Editor 1 | Associate Editor | None | Select |
| Editor 2 | Editor-in-Chief | None | Select |

Current Editor

+ Add Another Editor Assignment Chain Template

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 <input type="button" value="v"/> |

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

[Open Special Character Palette](#)

Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

[Submit Note](#)

[View/Print All](#)

| Operator | Note | Date | Action |
|--------------------------|---|---------------------|--------|
| Mary François Smith, PhD | Adding a detailed people note to this user. | Dec 28 2017 11:53AM | |

Detailed People Notes

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

[View/Print All](#)


| Operator ▲▼ | Note | Date ▲▼ | Action |
|-----------------------------|--|------------------------|---|
| Mary François Smith, PhD | Adding a detailed people note to this user. | Dec 28 2017 11:53AM |  |

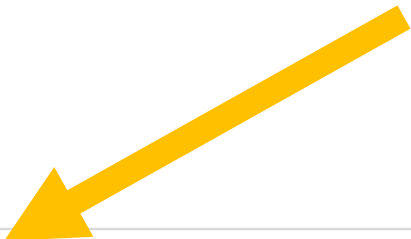
Display this section at the top of this page

Detailed People Notes

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

Page: 1 of 1 (3 total Reviewers) Display results per

| Select As | | | | Reviewer Name | Board Member | Classifications | Reviewer Statistics (Agreed Invitations) | | Invitation |
|--------------------------|--------------------------|--------------------------|--------------------------|--|--------------|-----------------|--|---------------------|----------------------|
| Inv. | Asn. | Alt. | Prop. | | | | Reviews in Progress: | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Buzz Aldrin  (Reviewer) | No | | Reviews in Progress: | 0 | Date Last |
| | | | | | | | Completed Reviews: | 1 | Outstandi |
| | | | | | | | Un-assigned After Agreeing: | 0 | Agreed: |
| | | | | | | | Terminated After Agreeing: | 0 | Declined: |
| | | | | | | | Last Review Agreed: | Mar 17 2016 10:24AM | Un-invited Agreeing: |
| | | | | | | | Last Review Completed: | Mar 17 2016 02:12PM | Terminate |
| | | | | | | | Last Review Declined: | - | Total Invi |
| | | | | | | | Avg Days Outstanding: | 0 | |
| | | | | | | | Manuscript Rating: | 0 | |
| | | | | | | | Avg Review Rating: | 0.0 | |

 [+ Detailed People Notes](#)

Detailed People Notes

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

| Select As | | | | Reviewer Name | Board Member | Classifications | Reviewer Statistics (Agreed Invitations) | | Invitation Statistics | |
|--------------------------|--------------------------|--------------------------|--------------------------|---------------------------------------|--------------|-----------------|--|---------------------|-----------------------------|---------------------|
| Inv. | Asn. | Alt. | Prop. | | | | Reviews in Progress: | | Date Last Invited: | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 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 | | |
|--------------------------|---|---------------------|
| 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

- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes

- Reviewer Search Criterion:**
- People Notes
 - Detailed People Notes
 - Personal Classifications
 - Personal Keywords

Enable permission here:

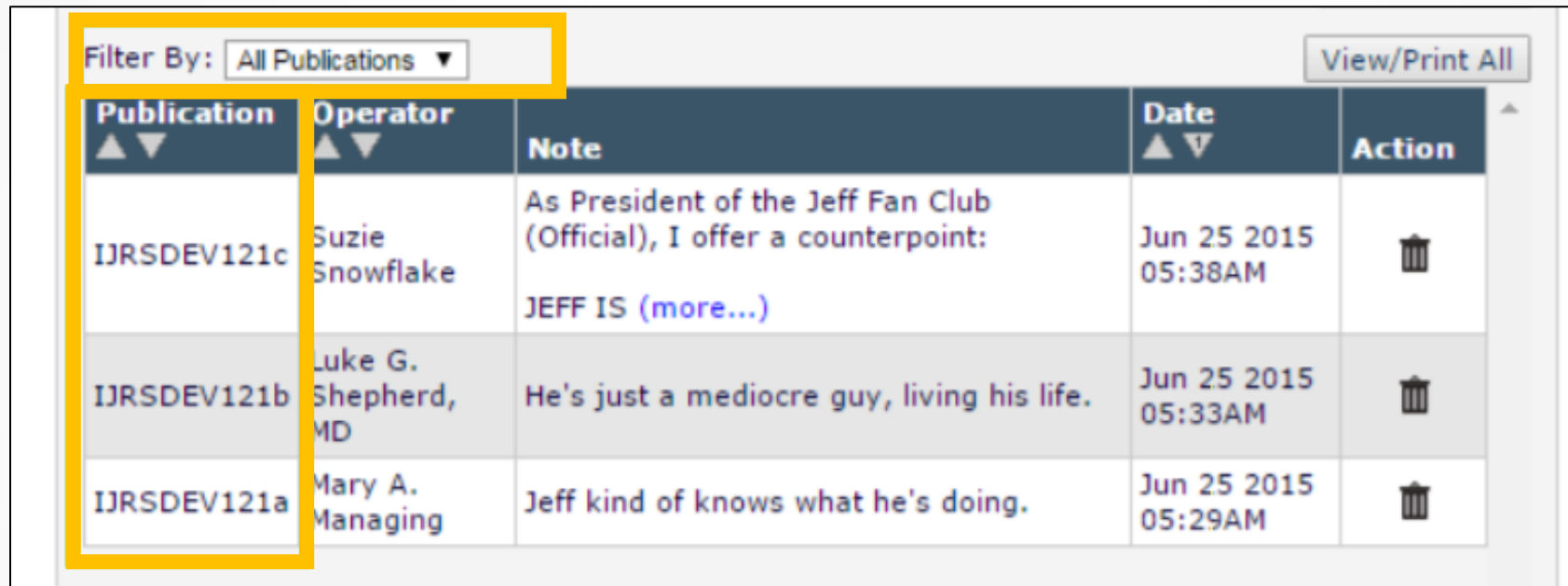
RoleManager → Select Editor Role → Viewing and Editing People Data section

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



Filter By: All Publications ▼ View/Print All

| Publication ▲▼ | Operator ▲▼ | Note | Date ▲▼ | Action |
|----------------|----------------------|--|---------------------|--------|
| IJSRDEV121c | Suzie Snowflake | As President of the Jeff Fan Club (Official), I offer a counterpoint: JEFF IS (more...) | Jun 25 2015 05:38AM | |
| IJSRDEV121b | Luke G. Shepherd, MD | He's just a mediocre guy, living his life. | Jun 25 2015 05:33AM | |
| IJSRDEV121a | Mary A. Managing | Jeff kind of knows what he's doing. | Jun 25 2015 05:29AM | |

Detailed People Notes – People Sharing

- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes

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:

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 appear here....

Instructions for Reviewers

Demonstration for EEMUG 2018

Original Submission
Robert Reviewer (Reviewer 2)

Recommendation: Overall Manuscript Rating (1-100):

Instructions


Configurable text:

Instructions **appear here....**

Add External Correspondence

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

CORRESPONDENCE HISTORY

 [Add Editorial Correspondence](#)

| Correspondence Date | Letter | Recipient | Status | Revision | Operator |
|---------------------|--|--------------------------|----------------------------|----------|---|
| Jan 2 2018 12:34PM | Journal Office Notice All Reviews Complete | Mary François Smith, PhD | Required Reviews Completed | 0 | Roger Reviewer [Proxied by Mary François Smith, PhD] |
| Jan 2 2018 12:34PM | Reviewer Thank You | Roger Reviewer | Received by Editor | 0 | Roger Reviewer [Proxied by Mary François Smith, PhD] |

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 Minute AM/PM

05 12 PM

U.S. Eastern Time

* Description:

Letter regarding EEMUG Prep

From:


Aries Marketing

To:

B. Hopkins

Letter Subject:

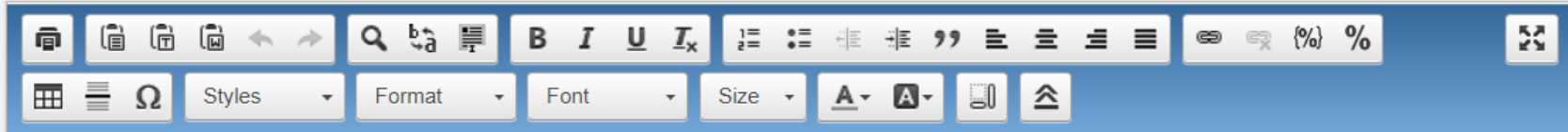
Are you ready for EEMUG?

 Attachments:

Add/Change Attachments

Letter Contents:

Open in New Window



A rich text editor toolbar with various icons for text formatting, alignment, and editing. The icons include undo, redo, search, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, quote, link, unlink, insert link, and insert image. Below the icons are dropdown menus for Styles, Format, Font, and Size, along with color selection tools for text and background color.

Add External Correspondence

CORRESPONDENCE HISTORY

Add Editorial Correspondence

| Correspondence Date | Letter | Recipient | Status | Revision | Operator |
|---------------------|-----------------------------------|---------------------|------------------|----------|--------------------------|
| Jan 8 2018 5:12PM | Letter regarding EEMUG Prep | | | | Mary François Smith, PhD |
| Jan 2 2018 12:34PM | Journal Office Notice All Reviews | Mary François Smith | Required Reviews | 0 | Roger Reviewer |

- Add/Edit External Correspondence
 - Add Attachments to 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

CORRESPONDENCE HISTORY

Add Editorial Correspondence

| Correspondence Date | Letter | Recipient | Status | |
|---------------------|--|--------------|---------------------|---|
| Jan 8 2014 12:28PM | Imported E-mail (External)  Remove Edit | | | |
| Jan 8 2014 10:56AM | Attachments to Author  | Buzz Aldrin | Received by Journal | C |
| Jan 8 2014 10:33AM | Attachments to Author | Buzz Aldrin | Received by Journal | C |
| Sep 18 2013 2:25PM | Editor Notice Author Approve Changes | Sally Editor | Received by Journal | C |
| Sep 18 2013 2:24PM | Author - return submission | Buzz Aldrin | Sent Back to Author | C |

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

| + Action | Manuscript Number ▲ | DOI ▼ | Author Name ▼ | Article Title ▼ | Article Type ▼ |
|---|---------------------|-------|---------------|--------------------------|----------------|
| View Submission View QC Results Similarity Check/iThenticate Results (57%) Duplicate Submission Check (31%) Details ▼ Initiate Discussion History Technical Information File Inventory Edit Submission Solicit Commentary Classifications Unassign Editor Notify Editor Invite Reviewers Set Final Disposition Initiate Production Similar Articles in MEDLINE Google Scholar Title Search Google Title Search Google Scholar Author Search Send E-mail Linked Submissions | WEBDEM-D-15-00003 | | Tom Smith ▼ | EEMUG 2017 Demonstration | Original Study |

| + Action | Manuscript Number ▼ | Article Type ▼ | Section Category |
|---|---------------------|----------------|------------------|
| Action Links ▼ (74%) | WEBDEM-D-12-00008R2 | Original Study | |
| Action ▼ (...) | | Original Study | |

Similarity Check Status Summary:

- % = highest similarity score
- ... = a similarity check is in process
- X = a similarity check could not be processed

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

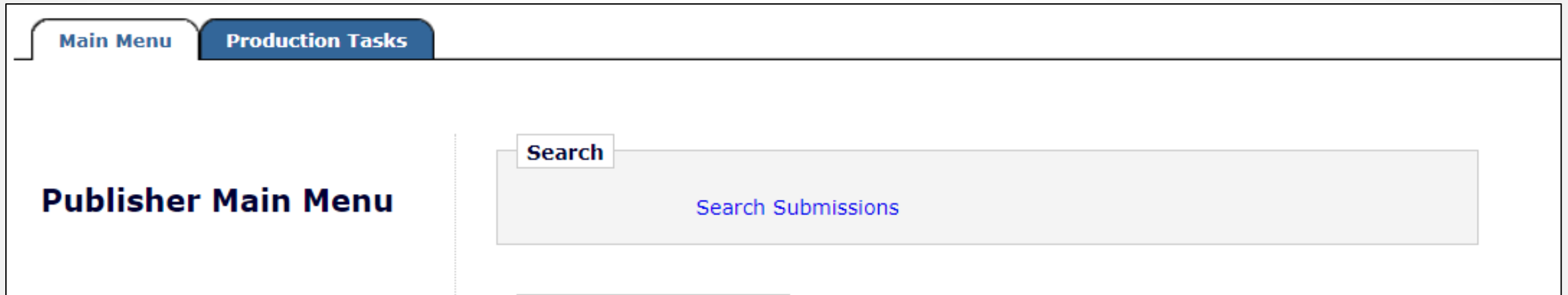
- Configure Similarity Score for your publication
- Configure any role permission to view

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

Edit Role Definition

Role Name:*

Check the functions that this role is permitted to perform.

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

General Searching and Viewing

- Search Submissions
- View Submission
- View Manuscript Details

Use Editorial Details Layout

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



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