

# Welcome to EEMUG 2017

13th Annual  European  
**Editorial Manager®**  
User Group Meeting





# Boot Camp Configurations

Melanie Cotterell  
12<sup>th</sup> January 2017



13<sup>th</sup> Annual **em** European  
**Editorial Manager**<sup>®</sup>  
User Group Meeting





# System Administration



# System Administration



Training and Demo Site



[HOME](#) • [LOGOUT](#) • [HELP](#) • [REGISTER](#) • [UPDATE MY INFORMATION](#) • [JOURNAL OVERVIEW](#)  
[MAIN MENU](#) • [CONTACT US](#) • [SUBMIT A MANUSCRIPT](#) • [INSTRUCTIONS FOR AUTHORS](#)

Go to:   
Role:  Username: melc

## Submissions with Decisions

[Submissions out for Revision \(12\)](#)  
[All Submissions with Editor's Decision \(8\)](#)  
[All Submissions with Final Disposition:](#)  
    [Accept \(59\)](#), [Reject \(3\)](#), [Withdrawn \(5\)](#), [Transfer \(17\)](#)  
[Completed Conference Submissions \(2\)](#)  
[Withdrawn Conference Submissions \(0\)](#)  
[My Assignments with Decision \(0\)](#)  
[My Assignments with Final Disposition \(0\)](#)

## Linked Submission Groups

[Active Linked Submission Groups](#)  
[Inactive Linked Submission Groups](#)

## Administrative Functions

[System Administrator Functions](#)  
[Register New User](#)  
[Reports](#)  
[Send Reminder Letters](#)  
[Send Batch E-mail](#)



Training and Demo Site



[ROLEMANAGER](#) • [ACTIONMANAGER](#) • [POLICYMANAGER](#) • [ADMINMANAGER](#) • [ADMINISTRATION HELP](#)

Role: Super User (all access)





# Admin Manager

## **AdminManager Main Menu**

Set Live Journal Flag

Manage Publication Groups

Set Default Target FTP Site for Extract of Conference Submissions

Share People

Configure Shared Letters Management

Configure Cross-Publication Submission Transfer

View File Transfer Statistics

Configure Restricted System Administration Access Rights



# User Registration

Self and Proxy Registration

# Policy Manager



The screenshot shows the 'PolicyManager Main Menu' interface. At the top left is the 'Aries systems' logo. The top center text reads 'Training and Demo Site'. At the top right is the 'em Editorial Manager' logo and the user role 'Role: Super User (all access)'. Below the header is a navigation bar with links: 'ROLEMANAGER', 'ACTIONMANAGER', 'POLICYMANAGER', 'ADMINMANAGER', and 'ADMINISTRATION HELP'. The main content area is titled 'PolicyManager Main Menu' and contains two buttons: 'Expand All' and 'Collapse All'. A menu item 'Registration and Login Policies' is expanded, showing a list of options. Two red arrows point to 'Edit Registration Fields' and 'Edit Registration Instructions', which are highlighted with red boxes.

**Aries** systems

Training and Demo Site

em Editorial Manager®

Role: Super User (all access)

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

## PolicyManager Main Menu

Expand All Collapse All

- [-] Registration and Login Policies
  - Edit Banner URLs
  - Edit Registration Fields
  - Edit Registration Instructions
  - Create Registration Questions
  - Configure Proxy Registration
  - Configure Login Page
  - Set Classifications and Keywords Deep Link Expiration
  - Configure Select Send Username or Password Option
  - Enable Role Switching
  - Configure Expedited Reviewer Login
  - Set Duplicate E-mail Address Policy
  - Enable Automatic Reviewer Role Assignment
  - Edit Other Author Login Instructions

# Registration Fields

## Edit Registration Fields

Please select the fields you would like to require in the user Registration process. These fields will be designated with an asterisk (\*) on the Registration, Update My Information, and Search People pages. Fields in bold text are required by Editorial Manager and cannot be made Optional by the publication.

Some system fields allow accompanying secondary fields. These secondary fields may be displayed on the registration pages to collect information in a different language or character set. The maximum length and type of the data entered in the secondary field is the same as the system field.

To make a personal identifier or secondary field required, select the first checkbox. To Hide the identifier or secondary field, select the 'Hidden' checkbox. The Required and Hidden checkboxes cannot both be selected. If an identifier or secondary field is Hidden, the field is no longer available for data entry, and any values previously entered into this field are not displayed on any page in the system.

	Required	Hidden	System Field
	<input checked="" type="checkbox"/>		Title
	<input checked="" type="checkbox"/>		<b>Given/First Name</b>
	<input type="checkbox"/>		Middle Name
	<input checked="" type="checkbox"/>		<b>Family/Last Name</b>
	<input checked="" type="checkbox"/>		Degree
	<input type="checkbox"/>		Preferred Name
	<input type="checkbox"/>		Telephone Number



# Registration Fields (cont.)

<input checked="" type="checkbox"/>	Username
<input checked="" type="checkbox"/>	Security Question
<input checked="" type="checkbox"/>	Security Answer
<input type="checkbox"/>	Secondary Given/First Name
<input type="checkbox"/>	Secondary Family/Last Name
<input type="checkbox"/>	Secondary Degree
<input type="checkbox"/>	Secondary Position
<input type="checkbox"/>	Secondary Institution
<input type="checkbox"/>	Secondary Department
<input type="checkbox"/>	Secondary Street Address Line 1
<input type="checkbox"/>	Secondary Street Address Line 2
<input type="checkbox"/>	Secondary Street Address Line 3
<input type="checkbox"/>	Secondary Street Address Line 4
<input type="checkbox"/>	Secondary City
<input type="checkbox"/>	Secondary State

Access to Personal Classifications (defined by an administrator) and Keywords (typed by the user) can be hidden from users when they register or update their information. You can set a maximum number of classifications that users may select or keywords they may add when they register or update their information; making an item required enforces a minimum of at least one.

**Classifications and Keywords**

	Hidden	Optional	Required (Minimum)	Maximum (leave blank for no limit)
Select Personal Classifications	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/> <input type="text"/>	<input type="text"/>
Enter Personal Keywords	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/> <input type="text"/>	<input type="text"/>

# Policy Manager – Institution Name Normalization



☐ General Policies

- Set Manuscript Number Type
- Set Manuscript Number Revision Suffix
- Set Date Format
- Set Time Zone Display Policy
- Configure Unavailability Check and Instructions
- Set ISO Country Standard
- Configure General Due Date Preferences
- Set Reviewer Preferences
- Configure Electronic Calendar Due Date Preferences
- Set Editor Deep Link Expiration
- Set Enterprise Analytics Reporting Deep Link
- Set View Reviewer Comments for Author Deep Link Expiration
- Define Details Page Layouts
- Set Update Information Deep Link Expiration
- Create Customized Submission Flags
- Create Customized People Flags
- Edit Instructions for Archived Files
- Edit Production Notes Instructions
- Edit Alternate Contact Notes Instructions
- Customize Author Main Menu Instructions
- Configure Personal Classification Rankings
- Customize Reviewer Selection Summary Instructions
- Enable Institution Name Normalization

# Institution Name Normalization

## Enable Institution Name Normalization

When this feature is enabled, users will be presented with a list of affiliations to choose from wherever Institution and Department are entered in the system. This includes Registration, Proxy Registration, Update My Information, Alternate Contact Information, Search People - Update Information, and Add/Edit Authors (manuscript submission step).

By activating this option you acknowledge that you and your users will be using and contributing to a normalized and crowd-sourced institutional and department name database that belongs to Aries and its licensors.

Enable Institution Name Normalization

Cancel

Submit



# Role Manager



Training and Demo Site



Role: Super User (all access)



[ROLEMANAGER](#) • [ACTIONMANAGER](#) • [POLICYMANAGER](#) • [ADMINMANAGER](#) • [ADMINISTRATION HELP](#)

## RoleManager

---

[Author Role](#)

[Reviewer Role](#)

[Editor Role](#)

[Publisher Role](#)



## RoleManager

Listed below are the roles that are currently defined for Editors. You may Add new roles or Remove or Edit existing roles. You can also create a new Editor Role by copying an existing role. When you Copy an Editor Role, all options in Editor RoleManager and related configuration options (e.g. Editor Forms, Manuscript Rating Questions, ActionManager letters, etc.) are carried over to the new role. Be sure to enter a unique Role Name and make sure all settings pertaining to the new role are correct, as the new role will be available for selection on pages where Editor Roles are displayed as soon as the Edit Role Definition page is submitted.



<a href="#">Managing Editor</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Editor (by invitation)</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Editorial Assistant - with tech check</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Super User (all access)</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Editor-in-Chief</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Editor (by assignment)</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>

# Role Manager - Proxy Registration Permission

- Flag Icons
-   Proxy Activities
  - Proxy Power:
    - Proxy For Authors
    - Proxy For Reviewers
    - Proxy For Editors
    - Proxy For Publishers
  -   Proxy Register New Users
    - E-mail Not Required (Warning Only) at Proxy Registration
    -   Require E-mail at Proxy Registration
- Administrative and Reporting Functions
- Cross-Publication Login
- Fees and Payments

# Policy Manager



The screenshot shows the 'Policy Manager Main Menu' interface. At the top left is the 'Aries systems' logo. The top center text reads 'Training and Demo Site'. At the top right is the 'em Editorial Manager' logo and the user role 'Role: Super User (all access)'. Below the header is a navigation bar with links: 'ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP'. The main content area is titled 'PolicyManager Main Menu' and contains two buttons: 'Expand All' and 'Collapse All'. A list of menu items is displayed under the heading 'Registration and Login Policies'. A red arrow points to the item 'Configure Proxy Registration', which is also highlighted with a red rectangular border.

**Aries** systems

Training and Demo Site

em Editorial Manager®

Role: Super User (all access)

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

## PolicyManager Main Menu

Expand All Collapse All

- [-] Registration and Login Policies
  - Edit Banner URLs
  - Edit Registration Fields
  - Edit Registration Instructions
  - Create Registration Questions
  - Configure Proxy Registration**
  - Configure Login Page
  - Set Classifications and Keywords Deep Link Expiration
  - Configure Select Send Username or Password Option
  - Enable Role Switching
  - Configure Expedited Reviewer Login
  - Set Duplicate E-mail Address Policy
  - Enable Automatic Reviewer Role Assignment
  - Edit Other Author Login Instructions



# Proxy Registration

## Configure Proxy Registration

This page is used to configure the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. You may configure whether or not the 'Register User and Send Letter' button is displayed, which fields the Editor will be forced to complete and the instructions that are displayed on the page. When you have made your selections please click 'Submit'.

### Display 'Register User and Send Letter' Button

Select the checkbox to display the 'Register User and Send Letter' button on the Proxy Registration page. When a checkbox is not selected, the 'Register User and Proceed' button is displayed and when the Editor selects the associated link, the option to send the letter associated with the 'Proxy Register New User' event in ActionManager is no longer available on the proxy registration page.

- 
- Register and Select New Reviewer link from the Reviewer Selection Summary Page show the 'Register User and Send Letter' button
  - Register and Invite New Author link from the Author Selection Summary Page show the 'Register User and Send Letter' button

### Configure Fields for Proxy Registration

Please select the fields you would like to present and require during the Proxy Registration process. Required fields will be labelled in red and designated with an asterisk on the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. Optional fields will be labelled in blue. Fields in bold text below are required by Editorial Manager and cannot be made optional by the publication.



	Required	Hidden	System Field
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Title	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Given/First Name</b>	
<input type="checkbox"/>	<input type="checkbox"/>	Middle Name	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Family/Last Name</b>	

# Proxy Registration (cont.)

- Secondary City  
 Secondary State

## Classifications and Keywords

Access to Personal Classifications (defined by an administrator) and Keywords (typed by the user) can be hidden from Editors when they proxy register a new user. You can set a maximum number of classifications that may be selected or keywords that may be added; making an item required enforces a minimum of at least one.

*Hidden*   *Optional*   *Required (Minimum)*   *Maximum (leave blank for no limit)*

Select Personal Classifications

Enter Personal Keywords

## Customize Proxy Registration Instructions

Event	Instructions
Proxy Register New User	<a href="#">Insert Special Character</a> You may register a new user and send that new user a custom Welcome letter, or choose not to send a letter. To begin the Proxy Registration process, please enter the following information:



# Managing People Records

Merging, Inactivation - Maintaining a clean database!



# Role Manager

**RoleManager**

---

[Author Role](#)  
[Reviewer Role](#)  
[Editor Role](#) ←  
[Publisher Role](#)

**RoleManager**

Listed below are the roles that are currently defined for Editors. You may Add new roles or Remove or Edit existing roles. You can also create a new Editor Role by copying an existing role. When you Copy an Editor Role, all options in Editor RoleManager and related configuration options (e.g. Editor Forms, Manuscript Rating Questions, ActionManager letters, etc.) are carried over to the new role. Be sure to enter a unique Role Name and make sure all settings pertaining to the new role are correct, as the new role will be available for selection on pages where Editor Roles are displayed as soon as the Edit Role Definition page is submitted.

<a href="#">Managing Editor</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Editor (by invitation)</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Editorial Assistant - with tech check</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Super User (all access)</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Editor-in-Chief</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Editor (by assignment)</a>	<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>

# Role Manager - Editor

## Edit Role Definition

Role Name:\*

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

[Expand All](#)

[Collapse All](#)

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- General Searching and Viewing
- Edit Submission
- Discussion Forums
- Transmittal Form
- Sending E-mail
- Viewing and Editing People Data
- Flag Icons
- Proxy Activities
- Administrative and Reporting Functions



# Merge/Inactivate Permissions

[-] Viewing and Editing People Data

- Search People
- View/Change Username and Password
- Send Username and Password
- Change E-mail Address
- Change Preferred Method of Contact
- Change Editor Role Designation to/from :
  - ALL EDITOR ROLES
  - Managing Editor
  - Editor (by invitation)
  - Editorial Assistant - with tech check
  - Super User (all access)
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
- Edit Additional People Details

# Submission Configurations

Article Types, Requirements and Co-Authors

# Submission Policies

## PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

**Registration and Login Policies**

**Status Policies**

**Submission Policies**

[Edit Article Types](#)

[Edit Submission Items](#)

[Configure Color Codes for Companion Files](#)

[Edit Sections/Categories](#)

[Set Classifications Display Policy](#)

[Edit Classifications](#)

[Edit Request Authenticated ORCID iD Instructions](#)

[Define PDF Cover Page Layouts](#)

[Select Author's Reviewer Preferences](#)

[Set Request Editor or Assign Editor Display Options](#)

[Edit Manuscript Geographic Region of Origin](#)

[Edit Manuscript Submission Instructions](#)

[Configure Instructions for New Submission Redirect](#)

[Configure Manuscript Services Icon](#)

[Set Maximum Size of Uploaded File](#)

[Set Other Author Parameters](#)





# Manuscript Submission Instructions

## Edit Manuscript Submission Instructions

Edit the text to appear at each step of the manuscript submission process and click "Update". Click "View Default Instructions" to see default instructions. Click "Revert to Default Instructions" to revert the manuscript to the default. HTML tags and special characters may be used.

*If you have configured one or more steps to be 'Required' for an Article Type, the following text will display (as the first instruction on the page) when the Author reaches this step of the Manuscript Submission process: [STEP] is Required for Submission.*

Cancel

Update

Manuscript Submission Step	New Submission Instructions	Revised Submission Instructions
Select Article Type	Choose the article type of your manuscript from the pull-down menu.	Change the article type of your manuscript from the pull-down menu if necessary.

# Submission Policies

## PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

**Registration and Login Policies**

**Status Policies**

**Submission Policies**

[Edit Article Types](#)

[Edit Submission Items](#)

[Configure Color Codes for Companion Files](#)

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[Set Classifications Display Policy](#)

[Edit Classifications](#)

[Edit Request Authenticated ORCID iD Instructions](#)

[Define PDF Cover Page Layouts](#)

[Select Author's Reviewer Preferences](#)

[Set Request Editor or Assign Editor Display Options](#)

[Edit Manuscript Geographic Region of Origin](#)

[Edit Manuscript Submission Instructions](#)

[Configure Instructions for New Submission Redirect](#)

[Configure Manuscript Services Icon](#)

[Set Maximum Size of Uploaded File](#)

[Set Other Author Parameters](#)

# Edit Article Types

## Edit Article Types

Listed below are the Article Types available for manuscript submission, conference submissions, proposal creation, invited submissions, commentaries and submissions by an Editor. ([more...](#))

Order	Article Type	Article Type Family	Editor/Publish Invited Use Only			
1	Quick Submission	Regular		Remove	Edit	Copy
2	Original Study	Regular		Remove	Edit	Copy
3	Editorial	Regular		Remove	Edit	Copy
4	Review	Regular		Remove	Edit	Copy
5	Rapid Communication	Regular		Remove	Edit	Copy
6	Case Report	Regular		Remove	Edit	Copy
7	Letter to the Editor	Regular		Remove	Edit	Copy
8	Commentary	Regular	✓	Remove	Edit	Copy
9	Special Issue	Proposal		Remove	Edit	Copy



# Submission Steps

**Edit Article Type**

Article Type:  Cancel Submit  
*Maximum Article Type name is 75 characters.*

Article Type Parameters	New Submission	Revised Submission
Set Secondary "Full Title" Preferences:	Optional	Hidden
Set "Short Title" Preferences:	Optional	Optional
Set Secondary "Short Title" Preferences:	Optional	Hidden
Set "Funding Information" Preferences:	Optional	Optional
Set "Select Section/Category" Preferences:	Optional	Optional
Set "Submit Abstract" Preferences:	Required	Required
Set Secondary "Submit Abstract" Preferences:	Optional	Hidden
Set "Enter Keywords" Preferences:	Optional	Optional
Set "Enter Secondary Keywords" Preferences:	Hidden	Hidden
Set "Select Classifications" Preferences:	Optional	Optional
Set "Additional Information" Preferences:		
Designate Submission Questionnaire:	Bootcamp	Hidden
Designate Author Questionnaire:	Coauthors	Hidden

# Submission Step Limits

## Edit Article Type

Cancel

Submit

Article Type:

*Maximum Article Type name is 75 characters.*



### Field Size Limitations - Leave blank for no limit on these fields.

Limit the *Full Title* to:   Words  Characters

Limit the *Short Title* to:   Words  Characters

Limit the *Abstract* to:   Words  Characters

Limit the *Comments* to:   Words  Characters

Maximum Number of Authors:

Maximum Number of Keywords:

Number of Classifications:  Minimum *A Minimum applies only when the 'Select Classifications' preference is set to "Required".*

Maximum *The Maximum applies only when the 'Select Classifications' preference is set to "Optional" or "Required".*



# Co-Authors/Other Authors

**PolicyManager Main Menu**

---

[Expand All](#)   [Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊖ **Submission Policies**
  - [Edit Article Types](#)
  - [Edit Submission Items](#)
  - [Configure Color Codes for Companion Files](#)
  - [Edit Sections/Categories](#)
  - [Set Classifications Display Policy](#)
  - [Edit Classifications](#)
  - [Edit Request Authenticated ORCID iD Instructions](#)
  - [Define PDF Cover Page Layouts](#)
  - [Select Author's Reviewer Preferences](#)
  - [Set Request Editor or Assign Editor Display Options](#)
  - [Edit Manuscript Geographic Region of Origin](#)
  - [Edit Manuscript Submission Instructions](#)
  - [Configure Instructions for New Submission Redirect](#)
  - [Configure Manuscript Services Icon](#)
  - [Set Maximum Size of Uploaded File](#)
  - [Set Other Author Parameters](#)



# Other Author Data

## 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.

Deceased Status, Equal Contribution Status and Post-Publication Corresponding Author can be set as 'Hidden' or 'Display'. If these fields are set to display, the Add/Edit/Remove Authors submission step will display a checkbox so that an Author(s) can be designated as deceased or an equal contributor on the paper. The Post-Publication Corresponding Author designation does not impact the editorial workflow in any way; it is a designation that is indicated on the published article.

The %ALL\_AUTHORS\_WITH\_SELECTED\_METADATA% merge field pulls in your choice of metadata elements for all Authors (including the Corresponding Author) to use in letters. To specify metadata for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all elements you want to include.

Cancel

Submit

### Other Author Parameters

### Include in Merge Field?

Set "Title" Text Entry Box Preference:

Required

Given/First Name

Required

Set "Secondary Given/First Name" Text Entry Box Preference:

Hidden

Set "Middle Name" Text Entry Box Preference:

Optional

Family/Last Name

Required

Set "Secondary Family/Last Name" Text Entry Box Preference:

Hidden

Set "Academic Degree(s)" Text Entry Box Preference:

Optional

# Submission Policies

## PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

**Registration and Login Policies**

**Status Policies**

**Submission Policies**

[Edit Article Types](#)

[Edit Submission Items](#)

[Configure Color Codes for Companion Files](#)

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[Edit Classifications](#)

[Edit Request Authenticated ORCID iD Instructions](#)

[Define PDF Cover Page Layouts](#)

[Select Author's Reviewer Preferences](#)

[Set Request Editor or Assign Editor Display Options](#)

[Edit Manuscript Geographic Region of Origin](#)

[Edit Manuscript Submission Instructions](#)

[Configure Instructions for New Submission Redirect](#)

[Configure Manuscript Services Icon](#)

[Set Maximum Size of Uploaded File](#)

[Set Other Author Parameters](#)

# Co-Author Options

## Edit Article Type

Cancel

Submit

Article Type:

Maximum Article Type name is 75 characters.

### Co-Author Parameters

#### Register/Verify Other Authors

Authenticated ORCID iD Request:

Display Author Questionnaire to Co-Authors

### Co-Author Parameters

#### Register/Verify Other Authors

Corresponding Author only  
Co-Authors verify on new submission  
Co-Authors register and verify on new submission  
Co-Authors verify on revision  
Co-Authors register and verify on revision

### Set "Additional Information" Preferences:

Designate Submission Questionnaire:

Designate Author Questionnaire:

# CRedit

## Edit Article Type

Cancel

Submit

Article Type:

*Maximum Article Type name is 75 characters.*

### All Authors Parameters

Contributor Roles:

Optional

Author Invitation

Required

### Invited Submissions

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.

*These settings affect any invitations generated from a submission with this article type; i.e from a Proposal or Solicited Commentary.*



# CRedit

## Set Other Author Parameters



Set "Contributor Roles" Preference:

Display

Set "Deceased Status" Checkbox Preference:

Hidden



Set "Equal Contribution Status" Checkbox Preference:

Display

Set "Post-Publication Corresponding Author" Checkbox Preference:

Hidden

Cancel

Submit

# Section/Categories

**PolicyManager Main Menu**

---

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

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊖ **Submission Policies**
  - [Edit Article Types](#)
  - [Edit Submission Items](#)
  - [Configure Color Codes for Companion Files](#)
  - [Edit Sections/Categories](#)**
  - [Set Classifications Display Policy](#)
  - [Edit Classifications](#)
  - [Edit Request Authenticated ORCID iD Instructions](#)
  - [Define PDF Cover Page Layouts](#)
  - [Select Author's Reviewer Preferences](#)
  - [Set Request Editor or Assign Editor Display Options](#)
  - [Edit Manuscript Geographic Region of Origin](#)
  - [Edit Manuscript Submission Instructions](#)
  - [Configure Instructions for New Submission Redirect](#)
  - [Configure Manuscript Services Icon](#)
  - [Set Maximum Size of Uploaded File](#)
  - [Set Other Author Parameters](#)









# Section Category

### Edit Sections/Categories

Listed below are the Sections/Categories available. You may Add, Edit, or Remove Sections/Categories. Sections/Categories may be hidden by clicking the "Edit" link and selecting the "Hide" checkbox on that page. Any Sections/Categories which appear grayed out have been hidden.

If manuscripts are automatically assigned by the 'Submissions where Author has selected a Section/Category' method (as configured on the 'Set Editor Assignment Options' page), a Responsible Editor must be selected from the drop-down menu.

Section/Category Name	Responsible Editor		
 Invited Editor Section	Super User, P	Remove	Edit
  Clinical Section		Remove	Edit
  Epidemiology Section		Remove	Edit
 Conference	Mike Di Natale, n/a	Remove	Edit

New Section or Category:

*Maximum Section/Category name is 100 characters*

Responsible Editor (required if Editor Assignment is configured as 'Submissions where Author has selected a Section/Category'):

None

Direct to Editor functionality - more details:

[http://www.editorialmanager.com/robohelp/13.0/Editorial\\_Manager\\_Help/Autonomous\\_Editor\\_Direct\\_to\\_Editor.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Autonomous_Editor_Direct_to_Editor.htm)

# Classifications

## PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

**Registration and Login Policies**

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[Edit Article Types](#)

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[Edit Request Authenticated ORCID iD Instructions](#)

[Define PDF Cover Page Layouts](#)

[Select Author's Reviewer Preferences](#)

[Set Request Editor or Assign Editor Display Options](#)

[Edit Manuscript Geographic Region of Origin](#)

[Edit Manuscript Submission Instructions](#)

[Configure Instructions for New Submission Redirect](#)

[Configure Manuscript Services Icon](#)

[Set Maximum Size of Uploaded File](#)

[Set Other Author Parameters](#)




# Edit Classifications

## Edit Classifications

The Editorial Manager Classification schema contains a hierarchical numbering structure. Each level is separated by a decimal point/period character. To add or change a classification, enter the full classification number, for example 10.100.020.001 for a fourth-level classification. Click a Classification's description to view the full list of classifications above it in the hierarchy. Note that 'Expand All' and 'Collapse All' navigation links are initially provided for smaller classification lists, but if your list exceeds 1000 terms these will not display.

[View Selection and Display Policies](#)



Search

Matching terms display in red text

Active Classifications

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

-   [Remove](#) [Edit](#) **20:Second Major Term**
  - [Remove](#) [Edit](#) 20.500:Minor Term under Second
  - [Remove](#) [Edit](#) 20.600:New Classification
- [Remove](#) [Edit](#) **30:Third Major Term**
- [Remove](#) [Edit](#) **40:Training and Education**






# Questionnaire Policies

**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](#)





# Create Custom Questions

## Create Custom Questions

Listed below are the customized questions/fields which may be displayed as part of a Questionnaire. Each question may also be configured to display in additional locations (Transmittal Form, PDF Cover Page, Manuscript Details).

A question may be removed unless it has been used. If a question has been used but is now obsolete, it may be inactivated by clicking the Hide link. If the link does not appear for a question, then it is still included on a questionnaire and must first be removed from the questionnaire before it can be hidden.

Questions preceded by a "\$" symbol are multi-part questions; note that the follow-up questions listed may only be asked if the user chooses a certain response to the original question.

Actions	Description
 <a href="#">Add Question</a>	
<a href="#">Edit</a>	The journal can create custom question?
<a href="#">Edit</a>	Custom questions and responses can also appear on the Transmittal Form?
 <a href="#">Edit</a>	Has this paper been submitted to any other journal?
<a href="#">Edit</a>	NEW SUBMISSION QUESTION
<a href="#">Edit</a>	REVISED SUBMISSION QUESTION
<a href="#">Edit</a>	List Question, after updating list
<a href="#">Edit</a>	Please confirm you have approval from all Co-Authors to submit this manuscript.
<a href="#">Edit</a>	What is the total word count of your manuscript?
 <a href="#">Remove</a> <a href="#">Edit</a>	Have you followed the template and instructions for authors for this article type?
<a href="#">Edit</a>	<strong>LEGACY Author Contributions: performed the experiments</strong> Please enter the initials of each author who performed the experiments for this manuscript separated by a space.
<a href="#">Edit</a>	Please enter <b>all</b> conflicts of interest in the space provided. <i>Please note that this information will be made available to the reviewers at the discretion of the editors.</i>
 <a href="#">Edit</a>	\$ Do you have a conflict of interest to declare?
<a href="#">Edit</a>	\$ Are you submitting this paper to other journals?

# Question Options

## 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.

Cancel

Save and Close

Save and Add Another Question

[Open Special Character Palette](#)

Question text:

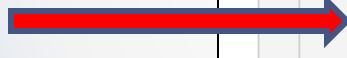
Instructions for Author Response:

"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  
Date  
Integer  
Decimal  
Notes  
List

Maximum Field Length (1-200):



# Question Options (cont.)

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

**Response Type:**  **List Type:**

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

**Display Default**

**Order Value Value**

**Description**

Please select a response

Yes

No

**If user selects:**

Please select a response

Yes

No

# Follow Up Questions



## + Follow-up Question 1


If user selected "Yes" in response to *"Did you learn anything new in Bootcamp?"*

---




Which sections covered today were of most value?

- The submission process
- Managing people records
- All about letters
- Basic Reporting
- Other




If user selects any of the following:

- The submission process
- Managing people records
- All about letters
- Basic Reporting
- Other



Add Follow-up Question


# Follow Up Questions (cont.)



## + Follow-up Question 1.1

If user selected "Other" in response to *"Which sections covered today were of most value?"*

---



Please tell us what you liked best about Bootcamp.

Character Count: 0

Limit 200 characters

# Follow Up Questions (cont.)



## + Follow-up Question 2

If user selected "No" in response to *"Did you learn anything new in Bootcamp?"*

---



Please tell us what you would have liked us to cover. Your input will help us improve Bootcamp next year.

Character Count: 0


Limit 20000 characters



# Question Options (cont.)

## Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote
- Include in Publication Charges Metadata *(Please enter a Custom Metadata ID below)*

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:

Save and Close

Save and Add Another Question

[Create/Edit Questionnaires](#)

[Return to PolicyManager](#)

# Create Questionnaires

## Create Questionnaire

Create a new Questionnaire by clicking the 'Add' button below.  
Questionnaires displayed here may be configured for use with Article Types or Production Tasks.

10.0 Feature Presentation Part1

[Remove](#)

[Edit](#)

10.0 Feature Webinar

[Remove](#)

[Edit](#)

5/9 Webinar

[Remove](#)

[Edit](#)

9.0 New Feature Questionnaire - view on PDF

[Remove](#)

[Edit](#)

Author Questionnaire

[Remove](#)

[Edit](#)

Bootcamp

[Remove](#)

[Edit](#)

Coauthor Questionnaire

[Remove](#)

[Edit](#)

Coauthors

[Remove](#)

[Edit](#)

EMUG

[Remove](#)

[Edit](#)

Name Questionnaire

[Remove](#)

[Edit](#)

New Submission test

[Remove](#)

[Edit](#)

Original Study Questionnaire

[Remove](#)

[Edit](#)

Original Study Questionnaire

[Remove](#)

[Edit](#)

Revised Submission Test

[Remove](#)

[Edit](#)

Sample Questionnaire

[Remove](#)

[Edit](#)

Submission Questionnaire

[Remove](#)

[Edit](#)

TEST FOR 10.0

[Remove](#)

[Edit](#)

Webinar 5.10

[Remove](#)

[Edit](#)

wendys questionnaire

[Remove](#)

[Edit](#)

WM new test

[Remove](#)

[Edit](#)

[Add](#)

# Create Questionnaires (cont.)

## 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.

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	Required	Include in Merge Field	Actions
<input type="text" value="1"/>	§ Did you learn anything new in Bootcamp?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>



# Apply Questionnaire to Article Types

**PolicyManager Main Menu**

[Expand All](#)   [Collapse All](#)

- Registration and Login Policies**
- Status Policies**
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  - Edit Article Types**
  - Edit Submission Items
  - Configure Color Codes for Companion Files
  - Edit Sections/Categories
  - Set Classifications Display Policy
  - Edit Classifications
  - Edit Request Authenticated ORCID iD Instructions
  - Define PDF Cover Page Layouts
  - Select Author's Reviewer Preferences
  - Set Request Editor or Assign Editor Display Options
  - Edit Manuscript Geographic Region of Origin
  - Edit Manuscript Submission Instructions
  - Configure Instructions for New Submission Redirect
  - Configure Manuscript Services Icon
  - Set Maximum Size of Uploaded File
  - Set Other Author Parameters

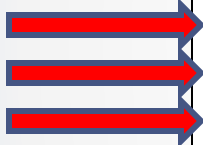


# Apply Questionnaire to Article Types

Set "Funding Information" Preferences:	Required	Optional
Set "Select Section/Category" Preferences:	Optional	Optional
Set "Submit Abstract" Preferences:	Required	Required
Set Secondary "Submit Abstract" Preferences:	Optional	Hidden
Set "Enter Keywords" Preferences:	Optional	Optional
Set "Enter Secondary Keywords" Preferences:	Hidden	Hidden
Set "Select Classifications" Preferences:	Optional	Optional
Set "Additional Information" Preferences:		
Designate Submission Questionnaire:	Bootcamp	Hidden
Designate Author Questionnaire:	Coauthors	Hidden
Set "Enter Comments" Preferences:	Optional	Optional
Set "Suggest Reviewers" Preferences:	Display	Display
Set "Oppose Reviewers" Preferences:	Display	Display
Set "Respond to Reviewers" Preferences:	Hidden	Optional
Set "Request Editor" Preferences:	Hidden	Hidden
Set "Select Region of Origin" Preferences:	Optional	Optional

**Fees and Charges**

*You may set Minimum and/or Maximum limits for the 'Number of Classifications' under Field Size Limitations below.*





# Suggest/Oppose Reviewers – minimum in Edit Article Types

Set "Enter Comments" Preferences:	Optional	Optional
Set "Suggest Reviewers" Preferences:	Display	Display
Set "Oppose Reviewers" Preferences:	Display	Display
Set "Respond to Reviewers" Preferences:	Hidden	Optional

Author Parameters	First Revision
Number of days Author has to Revise Submission:	<input type="text" value="30"/>
Authenticated ORCID iD Request:	<input type="text" value="Hidden"/>
Authors must suggest a minimum of <input type="text" value="0"/> Reviewers when submitting their manuscripts.	



# Suggest/Oppose Reviewers

**PolicyManager Main Menu**

---

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- ▣ **Registration and Login Policies**
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- ▣ **Submission Policies**
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  - [Configure Duplicate Submission Check](#)
  - [Configure Technical Check](#)
  - [Configure Similarity Check](#)
  - [Configure Office 2007 and Higher Support](#)
  - [Configure Author Accept Checkbox](#)
  - [Configure Publication Charges Processing](#)





# Suggest/Oppose Reviewers

## Select Author's Reviewer Preferences

You may ask Authors to suggest preferred Reviewers when submitting a manuscript (Suggest Reviewers). You may also ask Authors to indicate Reviewers who should not review the submission due to conflict of interest or bias (Oppose Reviewers). All of the fields below are displayed for the Suggest Reviewer and Oppose Reviewer submission steps. However, you can specify which fields are required for Authors to fill in, by checking the boxes below. First and Last Name are always required when suggesting or opposing Reviewers. You must then go to the 'Edit Article Type' page and set the step(s) to 'Display' for the appropriate Article Types. You may also specify a minimum number of suggested Reviewers on the Edit Article Type page.

Suggest Reviewers	Oppose Reviewers
<input checked="" type="checkbox"/> Given/First Name	<input checked="" type="checkbox"/> Given/First Name
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Middle Name
<input checked="" type="checkbox"/> Family/Last Name	<input checked="" type="checkbox"/> Family/Last Name
<input type="checkbox"/> Degree	<input type="checkbox"/> Degree
<input type="checkbox"/> Position	<input type="checkbox"/> Position
<input type="checkbox"/> Department	<input type="checkbox"/> Department
<input type="checkbox"/> Institution	<input type="checkbox"/> Institution
<input checked="" type="checkbox"/> E-mail	<input checked="" type="checkbox"/> E-mail
<input type="checkbox"/> Reason	<input checked="" type="checkbox"/> Reason

Cancel Submit

# Region of Origin

## PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊕ **Submission Policies**
- ⊕ **Questionnaire Policies**
- ⊕ **Additional Data Policies**
- ⊕ **Editor Assignment Policies**
- ⊕ **Suggest Editor Policies**
- ⊕ **Reviewer and Editor Form Policies**
- ⊕ **E-mail and Letter Policies**
- ⊖ **General Policies**
  - [Set Manuscript Number Type](#)
  - [Set Manuscript Number Revision Suffix](#)
  - [Set Date Format](#)
  - [Set Time Zone Display Policy](#)
  - [Configure Unavailability Check and Instructions](#)
  - [Set ISO Country Standard](#)
  - [Configure General Due Date Preferences](#)
  - [Set Reviewer Preferences](#)



# Region of Origin

## Set ISO Country Standard

Select an ISO 3166-1 Newsletter version from the drop-down menu.



Choose ISO Standard:

- |  |  |
|--|--|
| <a href="#">View ISO 3166-1 Newsletter VI-14</a> | <a href="#">Download ISO 3166-1 Newsletter VI-14</a> |
| <a href="#">View ISO 3166-1 Newsletter VI-8</a>  | <a href="#">Download ISO 3166-1 Newsletter VI-8</a>  |
| <a href="#">View ISO 3166-1 Newsletter VI-7</a>  | <a href="#">Download ISO 3166-1 Newsletter VI-7</a>  |
| <a href="#">View ISO 3166-1 Newsletter VI-6</a>  | <a href="#">Download ISO 3166-1 Newsletter VI-6</a>  |
| <a href="#">View ISO 3166-1 Newsletter V-12</a>  | <a href="#">Download ISO 3166-1 Newsletter V-12</a>  |
| <a href="#">View ISO 3166-1 Newsletter V-11</a>  | <a href="#">Download ISO 3166-1 Newsletter V-11</a>  |
| <a href="#">View ISO 3166-1 Newsletter V-10</a>  | <a href="#">Download ISO 3166-1 Newsletter V-10</a>  |
| <a href="#">View ISO 3166-1 Newsletter V-9</a>   | <a href="#">Download ISO 3166-1 Newsletter V-9</a>   |
| <a href="#">View ISO 3166-1 Newsletter V-8</a>   | <a href="#">Download ISO 3166-1 Newsletter V-8</a>   |
| <a href="#">View ISO 3166-1 Newsletter V-7</a>   | <a href="#">Download ISO 3166-1 Newsletter V-7</a>   |
| <a href="#">View ISO 3166-1 Newsletter V-6</a>   | <a href="#">Download ISO 3166-1 Newsletter V-6</a>   |
| <a href="#">View ISO 3166-1 Newsletter V-5</a>   | <a href="#">Download ISO 3166-1 Newsletter V-5</a>   |
| <a href="#">View ISO 3166-1 Newsletter V-4</a>   | <a href="#">Download ISO 3166-1 Newsletter V-4</a>   |
| <a href="#">View ISO 3166-1 Newsletter V-3</a>   | <a href="#">Download ISO 3166-1 Newsletter V-3</a>   |
| <a href="#">View ISO 3166-1 Newsletter V-2</a>   | <a href="#">Download ISO 3166-1 Newsletter V-2</a>   |
| <a href="#">View ISO 3166-1 Newsletter V-1</a>   | <a href="#">Download ISO 3166-1 Newsletter V-1</a>   |

This option will alphabetize, without exception, your elected ISO 3166-1 Newsletter country list which is used throughout Editorial Manager.



Display Country List Alphabetically

Cancel

Submit

# Edit Submission Items

**PolicyManager Main Menu**

---

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- ⊖ **Submission Policies**
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  - [Set Maximum Size of Uploaded File](#)
  - [Set Other Author Parameters](#)



# Submission Items

## Edit Master Submission Item Types

Listed below are the Item Types that may be uploaded as components of a submission. The order of items the user will see in the Item Type drop-down list on the 'Attach Files' page can be changed by entering the desired numeric order in the boxes below and clicking the "Update Item Order" button.

To force the items into this order during the manuscript submission process, select the checkbox 'Impose this order on uploaded files'. The Author will have the opportunity to re-order items of the same Item Type.

Impose this order on uploaded files.  
*Click the 'Save Changes' button to save this setting*

Required Items will be shown first in the drop-down list if the checkbox 'Show required Submission Items for each Article Type first in the drop-down list' is checked. If imposed ordering is enabled, then the required items will be displayed first in the drop-down list on the Attach Files page, but the files will be ordered according to the order defined below.

Show required Items for each Article Type first in the drop-down list.  
*Click the 'Save Changes' button to save this setting*

Save Changes

Order	Item Type	Item Family	Artwork QC	Reference Checking	Actions
<input type="text" value="1"/>	Author Agreement	Default			Edit
<input type="text" value="2"/>	AVI	Supplemental			Remove Edit
<input type="text" value="3"/>	AVI (companion file)	Supplemental			Edit
<input type="text" value="4"/>	Copyright form	Document			Remove Edit
<input type="text" value="5"/>	Copyright form (Companion)	Document			Edit
<input type="text" value="6"/>	Correl Draw File	Supplemental			Remove Edit
<input type="text" value="7"/>	Editor comments	Document			Edit
<input type="text" value="8"/>	Figure	Figure	✓		Edit
<input type="text" value="9"/>	Manuscript	Document		✓	Edit
<input type="text" value="10"/>	Table	Table			Edit

New Item Type:   
Maximum 256 characters

New Item Type Family:

Add New Item Type


# Submission Items

## 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
- Include this Item Type for checkCIF
- Include this Item Type for Reference Checking
- This Item Type will contain reference annotations. [Example](#)

# Submission Items – PDF Handling

## 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:  Build Item into PDF  Build Item and Hyperlink to the Item into the PDF  Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)  There is no restriction on the uploaded

file's extension or content

URL/URI/External Resource Entry (linked to the upload):

- Display with automatic line numbering in PDF
- Include this Item Type for Artwork Quality Checking
- Include this Item Type for checkCIF
- Include this Item Type for Reference Checking
- This Item Type will contain reference annotations. [Example](#)



# Submission Items – Restricted File Types

## Restricted File Types

You can restrict the types of files that can be uploaded for a Submission Item on the Attach Files page for both New and Revised submissions, with one exception: compressed files (zip, gz, tgz, and tar) cannot be restricted.

For a file that will be built into a Reviewer PDF or Author/Editor PDF, you can allow all file types supported by the system for PDFs, or define either an exclusive list or an inclusive list which is based on the file types supported by the system for PDF handling:

- Allow all file types supported for PDFs (no publication file restrictions)
- Exclusive: Allow all file types on the list except the ones selected.
- Inclusive: Allow only the file types selected on the list.

### New Submission

- Allow all file types
- Exclusive: Allow all file types on the list except the ones selected.

Open Office PowerPoint (OPD)	^
Open Office Word (ODT)	
Open Office Excel (ODS)	
PowerPoint 2007 (PPTM PPTX)	
Excel 2007 (XLSB XLSM XLSX)	
Word 2007 (DOCX DOCM DOTM DOTX)	
Compiled LaTeX File (DVI)	v

- Inclusive: Allow only these files types

Open Office PowerPoint (OPD)	^
Open Office Word (ODT)	
Open Office Excel (ODS)	
PowerPoint 2007 (PPTM PPTX)	
Excel 2007 (XLSB XLSM XLSX)	
Word 2007 (DOCX DOCM DOTM DOTX)	
Compiled LaTeX File (DVI)	v

### Revised Submission

- Allow all file types
- Exclusive: Allow all file types on the list except the ones selected.

Open Office PowerPoint (OPD)	^
Open Office Word (ODT)	
Open Office Excel (ODS)	
PowerPoint 2007 (PPTM PPTX)	
Excel 2007 (XLSB XLSM XLSX)	
Word 2007 (DOCX DOCM DOTM DOTX)	
Compiled LaTeX File (DVI)	v

- Inclusive: Allow only these files types

Open Office PowerPoint (OPD)	^
Open Office Word (ODT)	
Open Office Excel (ODS)	
PowerPoint 2007 (PPTM PPTX)	
Excel 2007 (XLSB XLSM XLSX)	
Word 2007 (DOCX DOCM DOTM DOTX)	
Compiled LaTeX File (DVI)	v

Cancel

Submit

# Submission Items – Edit Article Types

**Edit Article Type**

Cancel Submit

Article Type:   
*Maximum Article Type name is 75 characters.*

**Submission Item Parameters:**

**Article Proof**

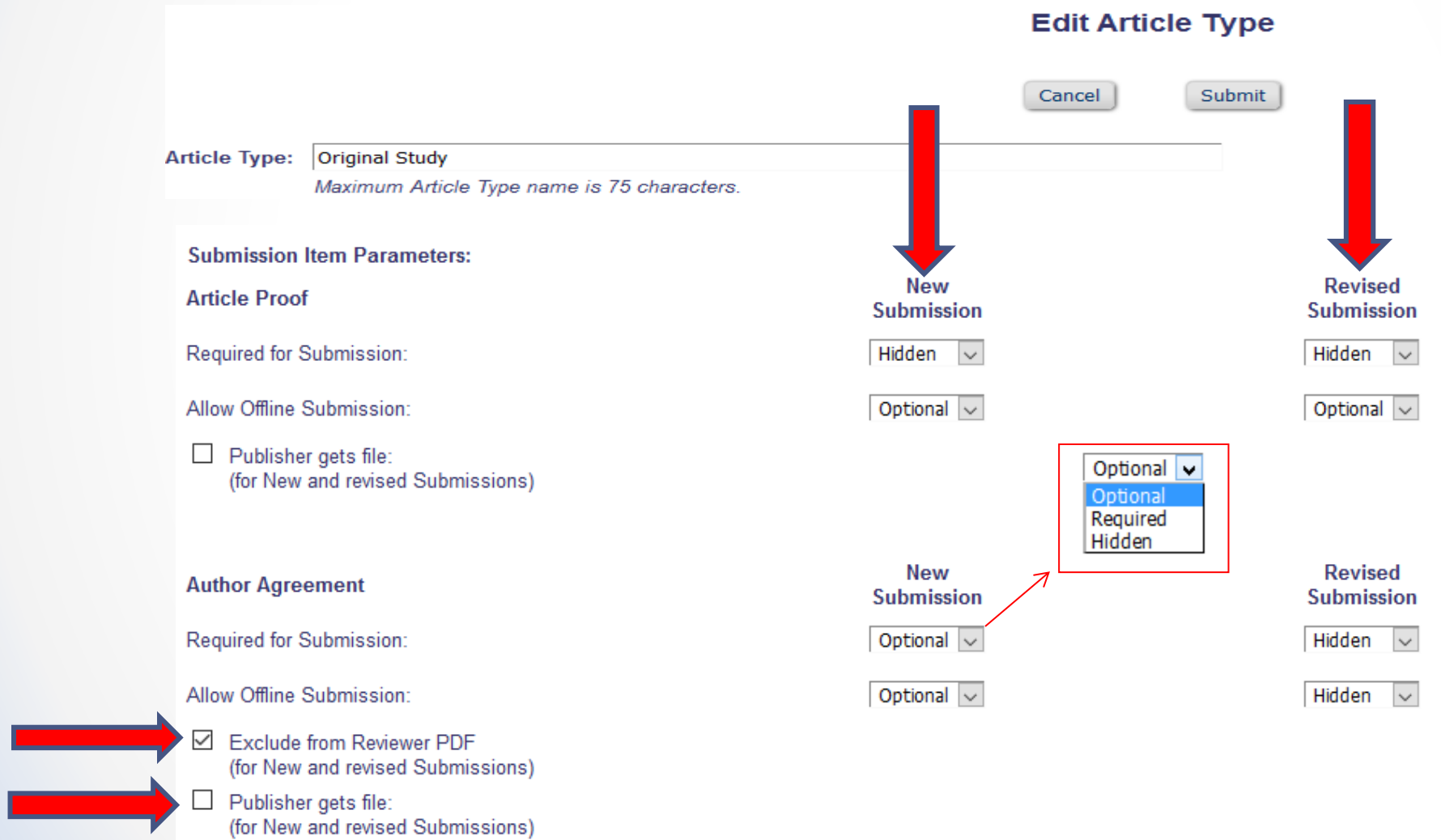
	New Submission	Revised Submission
Required for Submission:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Allow Offline Submission:	<input type="text" value="Optional"/>	<input type="text" value="Optional"/>
<input type="checkbox"/> Publisher gets file: (for New and revised Submissions)		

**Author Agreement**

	New Submission	Revised Submission
Required for Submission:	<input type="text" value="Optional"/>	<input type="text" value="Hidden"/>
Allow Offline Submission:	<input type="text" value="Optional"/>	<input type="text" value="Hidden"/>
<input checked="" type="checkbox"/> Exclude from Reviewer PDF (for New and revised Submissions)		
<input type="checkbox"/> Publisher gets file: (for New and revised Submissions)		

**Dropdown Menu:**

- Optional
- Optional
- Required
- Hidden



# Policy Manager - “I Accept” Checkbox and Author PDF Approval Page

## Submission Policies

Edit Article Types

Edit Submission Items



Configure Instructions for New Submission Redirect

Configure Manuscript Services Icon

Set Maximum Size of Uploaded File

Set Other Author Parameters

Configure Contributor Roles

Set Revision File Selection Option

Configure Duplicate Submission Check

Configure Technical Check

Configure Similarity Check

Configure checkCIF

Configure Author Accept Checkbox

Configure Publication Charges Processing



# “I Accept” Checkbox and Author PDF Approval Page

**Configure Author Accept Checkbox**

If you enable the Author Accept Checkbox feature for this publication, Authors will not be able to approve their submission and submit it to the editorial office without clicking the 'I Accept' checkbox on the Submissions Waiting for Author's Approval page. The Author Accept Checkbox feature can be used to require Authors to read and accept a publication's Ethics in Publishing Statement, Terms and Conditions, etc.

Enable Author Accept Checkbox on Submissions Waiting for Author's Approval Page.

Area	Instructions
Instruction to display on the Author's Submissions Waiting for Author's Approval Page	<a href="#">Insert Special Character</a> If no Actions appear for your submission, please wait a few minutes for your PDF to be built. The Actions appear automatically when your PDF is available. The 'Edit Submission' link <a href="#">View Default Instructions</a> <a href="#">Revert to Default Instructions</a>
Column Header	<a href="#">Insert Special Character</a> Please agree that you have followed the instructions for Authors
Alert Text displayed if Author does not tick/select box before clicking Approve Submission	<a href="#">Insert Special Character</a> Please check the box

# Technical Check

Processing New Submissions and Send Back to Author

# Configure Technical Check

## ▣ Submission Policies

Edit Article Types

Edit Submission Items



Set Maximum Size of Uploaded File

Set Other Author Parameters

Configure Contributor Roles

Set Revision File Selection Option

Configure Duplicate Submission Check

Configure Technical Check

Configure Similarity Check

Configure checkCIF

Configure Author Accept Checkbox

Configure Publication Charges Processing



# Configure Technical Check

## Configure Technical Check

When the Technical Check is enabled, new submissions are sent to a 'New Submissions' folder instead of directly to the 'New Submissions Requiring Assignment' folder. Revised submissions are sent to a 'Revised Submissions' folder instead of directly to the 'Revised Submissions Requiring Assignment' folder. Note: this feature cannot be used for submissions that go directly to an Editor (Direct-to-Editor).

The Instructions box allows you to add instructions that will appear at the time the Technical Check is performed. HTML tags may be used.

Enable Technical Check

Cancel

Preview

Submit

Instructions:

[Insert Special Character](#)

[Open in New Window](#)

```
<B><FONT COLOR=RED>ORIGINAL STUDY</B> </FONT>  
<LI> maximum word count 6000</li>  
<li> maximum color figures 5</li>
```

```
<FONT COLOR=RED><b> LETTER TO THE EDITOR</B></FONT>  
<LI> maximum word count 500</li>
```

Cancel

Preview

Submit



# Role Manager - Editor

### Edit Role Definition

**Role Name:\***   
*Maximum Role name is 40 characters.*

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

---

[Expand All](#)   [Collapse All](#)

**New Submissions**

- Receive New Submissions in 'New Submissions Requiring Assignment' Folder
- Perform Technical Check (submission received in 'New Submissions' Folder)
- Receive New Transferred Submissions in 'Transferred Submissions' Folder
- Submit Manuscript as an Editor
  - Restrict to 'Editor/Publisher Use Only' Article Types
  - Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types



# Edit Letters

## PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

- Registration and Login Policies**
- Status Policies**
- Submission Policies**
- Questionnaire Policies**
- Additional Data Policies**
- Editor Assignment Policies**
- Reviewer and Editor Form Policies**
- E-mail and Letter Policies**

**Edit Letters**

[Define Custom Merge Fields](#)

[Set "Email From" Address](#)

[Set Non-Email "Preferred Method Of Contact" Correspondence Email Address](#)

[Configure Email Import](#)

[Set Notify Author Blinding Policy](#)

[Set Notify Editor Preference](#)

# Add New Technical Check Letter

## Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title. [\(more...\)](#)

[Back to PolicyManager](#)

[Add New Letter](#)

[Save Changes](#)

[Edit Image Files for Letters](#)

Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	ActionManager Roles and Events	Letter Format		All Formats
			Text	Rich Text (HTML)	
X Reject and Transfer	Decision		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
X Author Reminder Report Test Letter	Author Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Welcome Letter - Go Live	Batch E-mail		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Welcome	General	<a href="#">Author - New User Registers</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Webinar - adding attachments to ad hoc emails	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Transfer Notification to Author	General	<a href="#">Author - Submission Transferred to Publication</a> <a href="#">Author - Final Disposition - Transfer</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Transfer Letter	Transfer Letter		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	
test	General		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Terminate Assignment	Terminate Assignments		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Send Username and Password	General	<a href="#">Author - Forgot Username or Password</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Reviewer Uninvited Notice	General	<a href="#">Test Reviewer - Un-invite Reviewers Before Agreeing to Review</a> <a href="#">Test Reviewer - Un-assign Reviewers After Agreeing to Review</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>

# Action Manager – Set Technical Check Letter for Author Role

## ActionManager

ActionManager allows you to specify who receives letters when a document's status changes, based on all the events that are tracked by Editorial Manager®. All the roles that have been defined in RoleManager are listed below.



- Document Status
- Author Letters
- Reviewer Letters
- reviewer 2 Letters
- Managing Editor Letters
- Editor Letters
- Editorial Assistant Letters
- Administrator Letters
- Senior Editor Letters
- AE or Reviewing Editor Letters
- Eic author blinding role Letters
- Publisher Letters
- Publisher with prod det Letters

# Send Back To Author Event

## Editor Edits Submission


Event	Author Letters
Incomplete Submission by Editor	NONE <input type="button" value="v"/>
Editor PDF Build Error	NONE <input type="button" value="v"/>
Building PDF for Editor	NONE <input type="button" value="v"/>
Original PDF Built by Editor	NONE <input type="button" value="v"/>
Revised PDF Built by Editor	NONE <input type="button" value="v"/>
Submission Sent Back to Author	Author Notice - Technical Check failure <input type="button" value="v"/>
Editor Approve Edited Submission	NONE <input type="button" value="v"/>



# Action Links

Duplicate, Details, History and Help!

# Configure Duplicate Submission Check

- 
- Submission Policies
    - Edit Article Types
    - Edit Submission Items
    - Configure Color Codes for Companion Files
    - Edit Sections/Categories
    - Set Classifications Display Policy
    - Edit Classifications
    - Edit Request Authenticated ORCID ID Instructions
    - Define PDF Cover Page Layouts
    - Configure PDF Watermarks
    - Select Author's Reviewer Preferences
    - Set Request Editor or Assign Editor Display Options
    - Edit Manuscript Geographic Region of Origin
    - Edit Manuscript Submission Instructions
    - Configure Instructions for New Submission Redirect
    - Configure Manuscript Services Icon
    - Set Maximum Size of Uploaded File
    - Set Other Author Parameters
    - Configure Contributor Roles
    - Set Revision File Selection Option
    - Configure Duplicate Submission Check
    - Configure Technical Check
    - Configure Similarity Check
    - Configure checkCIF
    - Configure Author Accept Checkbox
    - Configure Publication Charges Processing
- 



# Duplicate Submission Check

### Edit Article Type

Article Type:   
*Maximum Article Type name is 75 characters.*  
*Warning: changing the Article Type name will apply the name change to all submissions of t*

Family: Regular    Editor Use Only:

**Hide** When you **Hide** an Article Type, the Article Type will be deactivated (not available for new manu  
 Allow file uploads from arXiv.org server

Similarity Check:  Send Reviewer PDF on Initial Submission  
 Send Reviewer PDF on First Revision  
 Send Reviewer PDF on Final Disposition to Accept

Duplicate Submission Check:  Check for duplicate submissions to Editorial Manager

### Configure Duplicate Submission Check

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

**Alert me when:**

The same Corresponding Author has submitted a paper in the past  days

A similar paper has been previously submitted.

- Only display potential duplicate submissions that have an EM Duplicate Score that is  % or more
- Highlight the EM Duplicate Score when it is  % or more

Page	Instructions
Duplicate Submission Check Results	<a href="#">Insert Special Character</a> The results of a comparison between this submission and previously submitted

# Details Page Layouts – Role Manager/Policy Manager

**General Searching and Viewing**

Use Editorial Details Layout

Search All Manuscripts

- General Policies**
- Set Manuscript Number Type
  - Set Manuscript Number Revision Suffix
  - Set Date Format
  - Set Time Zone Display Policy
  - Configure Unavailability Check and Instructions
  - Set ISO Country Standard
  - Configure General Due Date Preferences
  - Set Reviewer Preferences
  - Configure Electronic Calendar Due Date Preferences
  - Set Editor Deep Link Expiration
  - Set Enterprise Analytics Reporting Deep Link
  - Set View Reviewer Comments for Author Deep Link Expiration
  - Define Details Page Layouts
  - Set Update Information Deep Link Expiration
  - Create Customized Submission Flags

Default Layouts			
Default Editorial			Copy
Default Proposals			Copy
Default Production			Copy
User-Defined Layouts			
Alternate Editorial Details Page	Remove	Edit	Copy
Copy of Default Editorial	Remove	Edit	Copy
Copy of Default Production	Remove	Edit	Copy



# Details Page



## Page Title

- Use standard identifiers (Manuscript Number and Title)
- Use identifiers selected in "Configure Identifiers Displayed in Production Tracking"

## Select Items

These links allow you to select the items that can appear in this details page. Use the [Select/Add Section Headings](#) link to add headings to your layout for ease of navigation. Note that certain RoleManager "View" permissions take precedence, and will suppress the field if a user without the correct permissions has access to this layout.



[Select Section Headings to Display](#)  
[Select Items to Display](#)



## Layout order

Select the order in which the items should appear on the Details page. To re-order the items, change the number for one item, click the 'Update Order' button, and all of the fields will re-order accordingly. Check/tick the "Show Link to this Item" option to include a link to the item at the top of the details page when that item is displayed.

Section Headings are shown in bold text.

Order	Default Description	Show link to this item
<input type="text" value="1"/>	Similarity Check	<input type="checkbox"/>
<input type="text" value="2"/>	DOI	<input type="checkbox"/>
<input type="text" value="3"/>	Final Disposition Date	<input type="checkbox"/>

# History – Role Manager Permissions

General Searching and Viewing

Google Scholar Author Search

- View Editorial Status History
- View Submission Production Status History
- View Submission Production Task Assignment History
- View Schedule Group Production Task Assignment History
- View Editorial Correspondence History
  - Edit Letter when Resending
- View Publication Charges Correspondence and Links
- View Submission Production Correspondence History
- View Schedule Group Production Correspondence History
- Add/Edit External Correspondence
  - Add Attachments to External Correspondence
- View All Submissions



# Help!

Cross Check:

[http://www.editorialmanager.com/robohelp/13.0/Editorial Manager Help/Automated Integration with CrossCheck.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Automated_Integration_with_CrossCheck.htm)

Discussion Forum:

[http://www.editorialmanager.com/robohelp/13.0/Editorial Manager Help/Discussion Forums.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Discussion_Forums.htm)

Remove Submission:

[http://www.editorialmanager.com/robohelp/13.0/Editorial Manager Help/Remove Submission.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Remove_Submission.htm)

Set Final Disposition:

[http://www.editorialmanager.com/robohelp/13.0/Editorial Manager Help/Setting Final Disposition.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Setting_Final_Disposition.htm)

Linked Submissions:

[http://www.editorialmanager.com/robohelp/13.0/Editorial Manager Help/Linking Submissions.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Linking_Submissions.htm)

[http://www.editorialmanager.com/robohelp/13.0/Editorial Manager Help/Review Sharing for Linked Submissions.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Review_Sharing_for_Linked_Submissions.htm)

Custom Flags

[http://www.editorialmanager.com/robohelp/13.0/Editorial Manager Help/Customizable Flags for Submissions and People.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Customizable_Flags_for_Submissions_and_People.htm)

# Assign Editor

Assigning Editors

# Role Manager - Editor

**Role Name:\***   
*Maximum Role name is 40 characters.*

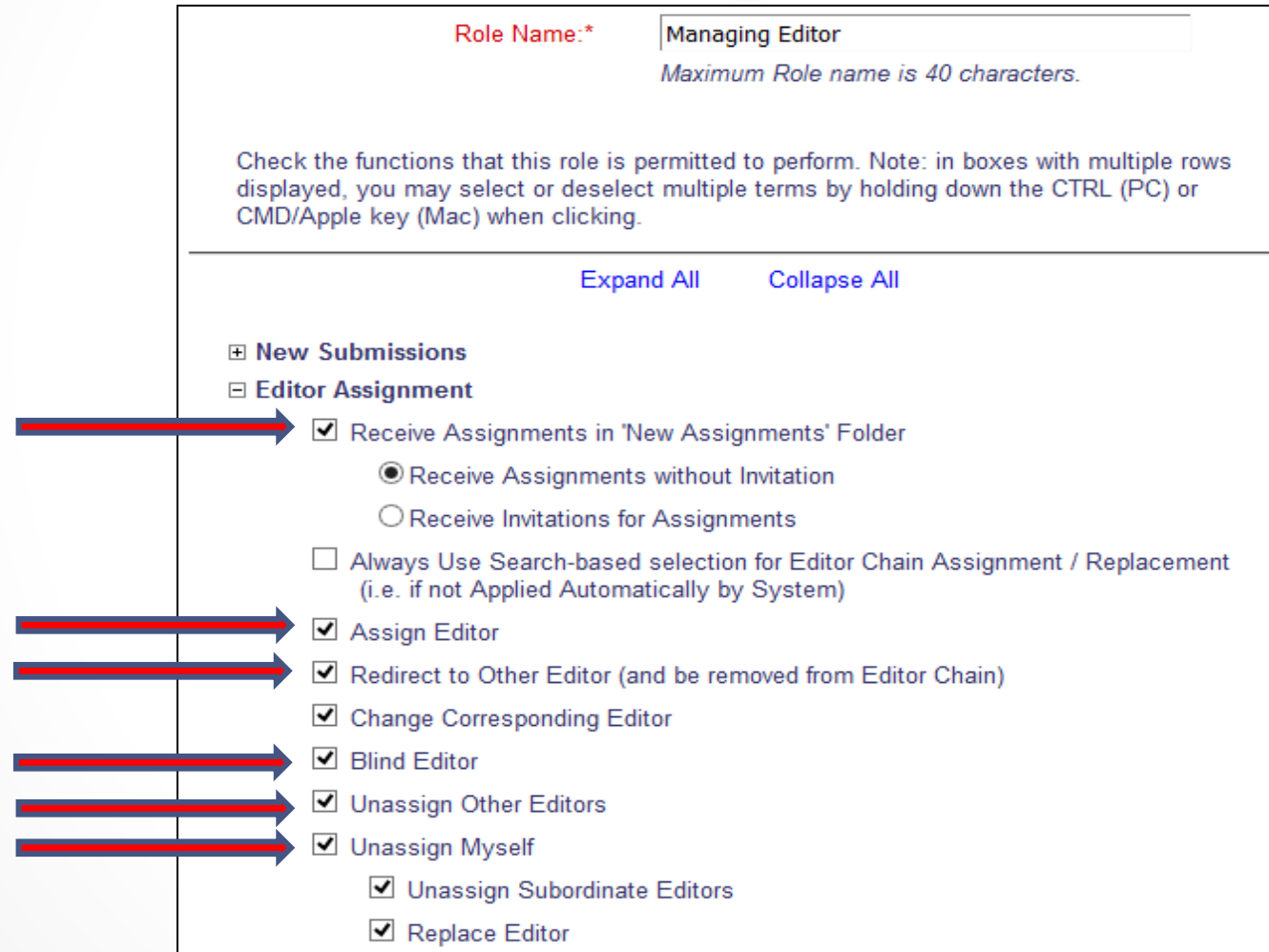
Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

[Expand All](#)   [Collapse All](#)

**New Submissions**

**Editor Assignment**

- Receive Assignments in 'New Assignments' Folder
  - Receive Assignments without Invitation
  - Receive Invitations for Assignments
- Always Use Search-based selection for Editor Chain Assignment / Replacement (i.e. if not Applied Automatically by System)
- Assign Editor
- Redirect to Other Editor (and be removed from Editor Chain)
- Change Corresponding Editor
- Blind Editor
- Unassign Other Editors
- Unassign Myself
  - Unassign Subordinate Editors
  - Replace Editor





# Set Editor Assignment Options

**PolicyManager Main Menu**

---

[Expand All](#)   [Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊕ **Submission Policies**
- ⊕ **Questionnaire Policies**
- ⊕ **Additional Data Policies**
- ⊖ **Editor Assignment Policies**
  - Set Editor Assignment Options**
  - Define Editor Assignment Chain Templates
  - Set Editor Rotation Participants
  - Edit Instructions on Modify Editor Chain Page
  - Configure Automated Summary Reminders

# Editor Assignment Options

where Author has Selected a Section/Category' automatically directs the submission to the Editor selected by the Author at the 'Select Section/Category' manuscript submission step.

If "Assign to Editors by Rotation" is selected, the submissions are automatically directed to the Editor with the oldest assignment date.

Submissions go to *New Submissions Requiring Assignment* folder

Except:

- Submissions where Author has selected an Editor  
*Please also configure settings on the 'Set Request or Assign Editor Display Options' page.*
- Submissions where Author has selected a Section/Category  
*Please also assign Editors to sections on the 'Edit Sections/Categories' page.*

Assign to Editor by Rotation  
*Please also select Editors on the 'Set Editor Rotation Participants' page.*

---

## Revised Submissions

The settings below control how revised manuscripts are assigned to Editors. The first choice, "Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder" allows manual assignment of Editors. If the "Allow reassignment to previous Editors" sub option is selected, then the user making the first editor assignment for the revision will be allowed to assign the entire chain of editors from the previous version as one step.

If the "Revisions are automatically directed to the First Assigned Editor of the previous version" choice is selected, a Revision will be automatically assigned to the First Assigned Editor of the previous version.

Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder

Allow reassignment to previous Editors

Letter:

Revisions are automatically directed to the First Assigned Editor of the previous version.

---

## Automatically Transfer Corresponding Editor Designation

If the checkbox below is checked, when the handling Editor changes for a submission (e.g. when an editor is assigned or a decision is made), the new handling Editor will automatically be designated as the Corresponding Editor.

Automatically designate the handling Editor as the Corresponding Editor.

# Action Manager - Set Letter for Editor Assignments

## ActionManager

ActionManager allows you to specify who receives letters when a document's status changes, based on all the events that are tracked by Editorial Manager®. All the roles that have been defined in RoleManager are listed below.

- Document Status
- Author Letters
- Test Reviewer Letters
- Reviewer Letters
- Managing Editor Letters
- Editor (by invitation) Letters
- Editorial Assistant - with tech check Letters
- Super User (all access) Letters
- Editor-in-Chief Letters
- Editor (by assignment) Letters
- Editorial Assistant without tech check Letters
- Editor Letters
- Guest Associate Editor Letters
- OUP Editor Letters
- JA OCD editor Letters
- Transfer Paper Editor Letters
- Super - Suggest Editor User Letters
- Assistant Editor Letters
- Section Letters
- Demo Editor Letters
- Editorial Director Letters
- Publisher Letters



# Action Manager – Editor Assigned Event

Editor Assigned



Event	Editor Letters
Editor Assigned (Not Invited)	Editor Assignment <input type="button" value="v"/>
Editor Invited for Assignment	NONE <input type="button" value="v"/>
Editor Agree to Assignment	NONE <input type="button" value="v"/>
Editor Declines Invitation of New Submission	NONE <input type="button" value="v"/>
Editor Declines Invitation from an Editor	NONE <input type="button" value="v"/>
Editor Assigned Notification	NONE <input type="button" value="v"/>
Un-invite Editor	NONE <input type="button" value="v"/>
Editor Unassigned	NONE <input type="button" value="v"/>
Manuscript Number Assigned	NONE <input type="button" value="v"/>
Editor Unassigned Notification	NONE <input type="button" value="v"/>
Editor Redirected	NONE <input type="button" value="v"/>

# Reviews and Reviewers

Search Reviewers, Review Forms and Re-Opening Reviews

# Role Manager – Editor

## Permission to Search Reviewers

Expand All Collapse All

- ⊕ New Submissions
- ⊕ Editor Assignment
- ⊖ Reviewer Invitations
  - Invite Reviewers
  - Un-Invite Reviewers
  - Assign Reviewers
  - Search Reviewers in Other Journals
  - Override Reviewer Due Date
  - Propose Reviewers
  - Remove Proposed Reviewers
  - Select Alternate Reviewers
  - Promote Alternate Reviewers
  - Link/Un-link Alternate Reviewers
  - Remove Alternate Reviewers
  - Request Unregistered Reviewers
  - Re-open Review
  - Edit Reviewer Comments and Ratings after Review is Submitted
  - Edit and Complete Reviews Terminated after Accepting Invitation
- Reviewer Search Options:
  - Search by Classification Matches
  - Search by Personal Classifications
  - Suggest Reviewers
- Reviewer Search Criterion:
  - People Notes
  - Detailed People Notes
  - Personal Classifications
  - Personal Keywords

# Classifications on Registration



Access to Personal Classifications (defined by an administrator) and Keywords (typed by the user) can be hidden from users when they register or update their information. You can set a maximum number of classifications that users may select or keywords they may add when they register or update their information; making an item required enforces a minimum of at least one.

## Classifications and Keywords

	<i>Hidden</i>	<i>Optional</i>	<i>Required (Minimum)</i>	<i>Maximum (leave blank for no limit)</i>
Select Personal Classifications	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/> <input type="text"/>	<input type="text"/>
Enter Personal Keywords	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/> <input type="text"/>	<input type="text"/>

Cancel Submit

A red arrow points to the 'Select Personal Classifications' row.



# Classifications on Submission

⊕ Registration and Login Policies

⊕ Status Policies

⊖ Submission Policies

[Edit Article Types](#)

[Edit Submission Items](#)

## Article Type Parameters

Set Secondary "Full Title" Preferences:

Optional ▾

Hidden ▾

Set "Short Title" Preferences:

Optional ▾

Optional ▾

Set Secondary "Short Title" Preferences:

Optional ▾

Hidden ▾

Set "Funding Information" Preferences:

Optional ▾

Optional ▾

Set "Select Section/Category" Preferences:

Optional ▾

Optional ▾

Set "Submit Abstract" Preferences:

Required ▾

Required ▾

Set Secondary "Submit Abstract" Preferences:

Optional ▾

Hidden ▾

Set "Enter Keywords" Preferences:

Optional ▾

Optional ▾

Set "Enter Secondary Keywords" Preferences:

Hidden ▾

Hidden ▾

Set "Select Classifications" Preferences:

Optional ▾

Optional ▾

## Field Size Limitations - Leave blank for no limit on these fields.

Limit the *Full Title* to:   Words  Characters

Limit the *Short Title* to:   Words  Characters

Limit the *Abstract* to:   Words  Characters

Limit the *Comments* to:   Words  Characters

Maximum Number of Authors:

Maximum Number of Keywords:

Number of Classifications:  Minimum *A Minimum applies only when the 'Select Classifications' preference is set to "Required".*

Maximum *The Maximum applies only when the 'Select Classifications' preference is set to "Optional" or "Required".*

# Policy Manager

## ▣ 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

# Edit Reviewer Recommendation Terms

## Edit Reviewer Recommendation Terms

Listed below are the terms used for Reviewer Recommendations. You may Add new terms or Remove or Edit existing terms.



Accept	Edit
Minor Revision	Edit
Major Revision	Edit
Reject	Edit



Accept with Provision	Remove	Edit
-----------------------	--------	------



New Reviewer Recommendation Term:

Add

# Edit Manuscript Rating Questions

## Edit Manuscript Rating Questions

- A ) The subject addressed in this article is worthy of investigation. [Edit](#)
- B ) The information presented was new. [Edit](#)
- C ) The conclusions were supported by the data. [Edit](#)
- D ) Clarity of Presentation [Edit](#)

[Add New Manuscript Rating Question](#)

[Return to PolicyManager](#)



## Edit Manuscript Rating Question

You may edit the text of the question below. This feature should be used to correct typos or change the wording of a question. This feature should NOT be used to change the fundamental meaning of the question, as it will distort historical statistics.

[Insert Special Character](#)

Edit Manuscript Rating Question:

*Maximum Manuscript Rating Question length is 256 characters.*



Choose the Manuscript Rating scale for this question:

- 1-3
- 1-5
- 1-10

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

# Match Review Forms – Add MRQ's

**Review Form and Manuscript Rating Configuration**

In the grid below, please specify the Review Form to use for each Article Type / Reviewer Role combination. Checking "Use Manuscript Rating Questions" turns on Manuscript Rating Questions for Reviewers of the specified Article Types. Use the "Select" link to choose which Manuscript Rating Questions to use for the associated Article Type and Reviewer Role.

Reviewer Role	Test Reviewer	Reviewer
Article Type		
Quick Submission	New: <input type="text" value="Demo Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>	New: <input type="text" value="Demo Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>
Original Study	New: <input type="text" value="Demo Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>	New: <input type="text" value="Demo Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>

# Match Review Forms – Add MRQ's (cont.)

**Reviewer Manuscript Rating Questions**  
**Original Study / Test Reviewer**

Check the boxes to include the questions in Manuscript Ratings for this Article Type/Reviewer Role. Reviewers are presented with these questions when submitting their review. You may change the order of the question display for Reviewers by renumbering the boxes in the Order column. You can also specify whether answering the question is Optional or Required. If a question is Required, the Reviewer will not be permitted to submit a recommendation without first answering the question.

Select All

Select	Order	Manuscript Rating Question	Answering the Question is:	
<input checked="" type="checkbox"/>	1	A) The subject addressed in this article is worthy of investigation.	<input checked="" type="radio"/> Required	<input type="radio"/> Optional
<input checked="" type="checkbox"/>	2	B) The information presented was new.	<input type="radio"/> Required	<input checked="" type="radio"/> Optional
<input checked="" type="checkbox"/>	3	C) The conclusions were supported by the data.	<input type="radio"/> Required	<input checked="" type="radio"/> Optional
<input type="checkbox"/>		D) Clarity of Presentation	<input checked="" type="radio"/> Required	<input type="radio"/> Optional

# Create Custom Review Questions

## Create Custom Review Questions

Listed below are the custom questions which may be displayed as part of a Review Form.

A question may be removed unless it has been used. If a question has been used but is now obsolete, it may be inactivated by clicking the Edit link and selecting the Hide checkbox. Hidden questions are displayed at the bottom of the list in gray italic text.

To add a new question, click the Add button.



Add

### Question

Is there a financial or other conflict of interest between your work and that of the authors?

Quality of Illustrations

Would you be willing to review a revision of this manuscript?

This proposal is for a novel application.

If you answered not applicable to question 3, please indicate why?

Another example of a list type question.

Yet another list example

Please indicate if you would like review a revision of this paper?

Do you have any conflicts of interest?

### Actions

Edit

Edit

Edit



Edit

Edit

Edit

Edit

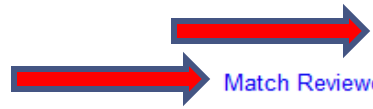
Remove

Edit

Remove

Edit

Add



[Create/Edit Review Forms](#)

[Match Reviewer Forms to Article Types and Reviewer Roles](#)

[Return to PolicyManager](#)



# Add New Custom Review Question

## Add Custom Review Question

Enter the question, default response text (if required), and any instructions to be displayed as part of the Review Form used at the Submit Recommendation step of the review process. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Review Question is no longer available for inclusion in new Review Forms.

Reviewer responses must be configured to use a specific Response Type: **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 requires the Reviewer to select from the list of responses. If **List** is chosen for the response type, additional options will appear which allow configuration of the list choices and type (dropdown, radio, checkboxes or scrolling selector). The **Yes/No** and **Yes/No/NA** response types will create a dropdown list with the options of Yes, No and Yes, No, Not Applicable, respectively. The **Yes/No/Text** response type will display a text box to gather additional information if the user chooses an option which requires further clarification.

Cancel

Submit

Question:

[Insert Special Character](#)



Instructions for Reviewer Response:

[Insert Special Character](#)




**Hide:** When you **Hide** a Custom Review Question, the question is deactivated (not available for use with new Review Forms).

# Add New Custom Review Question (cont.)

Instructions for Reviewer Response: [Insert Special Character](#)

**Hide:** When you **Hide** a Custom Review Question, the question is deactivated (not available for use with new Review Forms).

**Available for Decision Letter Merging:** When you select this checkbox, both the question and answer can be merged into the decision letter using the %REVIEW\_QUESTIONS\_AND\_RESPONSES% or %RESPONSES\_AND\_INDIVIDUAL\_COMMENTS\_TO\_AUTHOR% merge fields. Editors will be able to de-select individual responses from any Reviewer before the Author is notified. The question and answer will also be inserted into Reviewer Invitation/Assignment Letters by the %REVIEWER\_RESPONSES\_AND\_INDIVIDUAL\_COMMENTS\_TO\_AUTHOR% merge field, for those reviews explicitly selected by the Editor for inclusion

**Response Type:**  

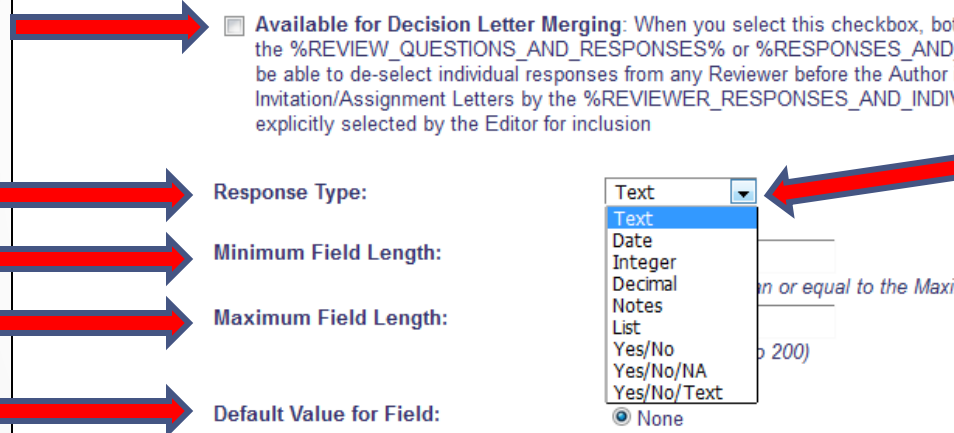
**Minimum Field Length:**  (must be greater than or equal to the Maximum Field Length)

**Maximum Field Length:**  (maximum 200)

**Default Value for Field:**




None  
 Single Value (enter value below)


[Insert Special Character](#)



# Create/Edit Review Forms

**Create Review Forms**

	Default Review Form	Edit	
	Demo Review Form	Remove	
	New Features Review Form 9.0	Remove Edit	
	Training Review	Remove Edit	

 [Add New Review Form](#)

[Create/Edit Custom Review Questions](#)

[Match Review Forms to Article Types and Reviewer Roles](#)

[Return to PolicyManager](#)

# Create/Edit Review Forms

## 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](#)

Thank you for taking the time to review for the Aries Demo Journal.

Please answer all questions as **<b>completely</b>** as possible.

Should you have any questions, please contact your Aries Account Coordinator.



Authorization to Transfer Review

[Edit Questions](#)

Question	Display on Review Form
If this submission is transferred to another publication, do we have your consent to include your identifying information?	<input type="checkbox"/>
If this submission is transferred to another publication, do we have your consent to include your review?	<input type="checkbox"/>
If this submission is transferred to another publication with "Open Peer Review", do we have your consent to publish your review in a pre-publication history?	<input type="checkbox"/>

# Create/Edit Review Forms

Instructions for Transfer Authorization

[Edit Instructions](#)

It is possible that this submission may be transferred to another publication at the conclusion of the peer review process. If the submission is transferred, we would like to include your review. We would also like to include your identifying information, so that the other publication can contact you if necessary. If you agree, we may transfer your name, degree(s), position, department, institution, address, phone number and e-mail address. Your review and identifying information will not be transferred unless you give your consent.


Custom Review Questions

Select Questions

Order	Question	Required for Submission	Visible to Other Reviewers	Visible to Author	Actions
1	Is there a financial or other conflict of interest between your work and that of the authors?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
2	Quality of Illustrations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
3	Would you be willing to review a revision of this manuscript?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
4	This proposal is for a novel application.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
5	If you answered not applicable to question 3, please indicate why?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
6	Another example of a list type question.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
7	Yet another list example	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>

Update Item Order

# Create/Edit Review Forms (cont.)

-   **Display Comments to Author text box**
- Merge into Editor Comments in Decision Chain
  - Keep separate from Editor Comments in Decision Chain

 Default Text for Comments to Author: [Insert Special Character](#)

  **Display Comments to Editor text box**

Default Text for Comments to Editor: [Insert Special Character](#)



Order	Review Form Section
<input type="text" value="1"/>	Reviewer Instructions
<input type="text" value="2"/>	Manuscript Rating Questions
<input type="text" value="3"/>	Custom Review Questions
<input type="text" value="4"/>	Comments to Authors and Editors
<input type="text" value="5"/>	Authorization to Transfer Review

# Match To Article Types

**Review Form and Manuscript Rating Configuration**

In the grid below, please specify the Review Form to use for each Article Type / Reviewer Role combination. Checking "Use Manuscript Rating Questions" turns on Manuscript Rating Questions for Reviewers of the specified Article Types. Use the "Select" link to choose which Manuscript Rating Questions to use for the associated Article Type and Reviewer Role.

[Display Manuscript Rating Question Responses to Author for all Reviewer Roles/Article Types](#)

Reviewer Role	Test Reviewer	Reviewer
Article Type		
Quick Submission	New: <input type="text" value="Demo Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>	New: <input type="text" value="Demo Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>
Original Study	New: <input type="text" value="Demo Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>	New: <input type="text" value="Demo Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>
Editorial	New: <input type="text" value="Default Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>	New: <input type="text" value="Default Review Form"/> <input type="button" value="v"/> <input checked="" type="checkbox"/> Use Manuscript Rating Questions <a href="#">Select</a> <input type="checkbox"/> Display Responses to Author Revised: <input type="text" value="Default Review Form"/> <input type="button" value="v"/>

# Role Manager – Reviewer

**RoleManager**

---

[Author Role](#)  
[Reviewer Role](#)  
[Editor Role](#)  
[Publisher Role](#)

**Edit Role Definition**

**Role Name:\***   
*Maximum Role name is 40 characters.*

Check the functions that this role is permitted to perform.

---

[Expand All](#)   [Collapse All](#)

- Permissions for New Reviewer Invitations**
- Permissions for Pending Assignments and Completed Assignments**
- Permissions for Completed Assignments Only**
- General Permissions (Applicable to All Reviewer Pages)**



# Role Manager – Reviewer

## ☐ Permissions for New Reviewer Invitations

- View Abstract Text
- Download Manuscript (Reviewer PDF)
- Download Submission Item
- View Corresponding Author and Affiliation
- View All Authors and Their Affiliations
- View Keywords
- View Document Classifications

## ☐ Permissions for Pending Assignments and Completed Assignments

- View Status History
- View Correspondence History
- View Corresponding Author
- View Similarity Check Results
- View checkCIF Results
-  View Reference Checking Results
-  Upload Attachments on Reviewer Recommendation page

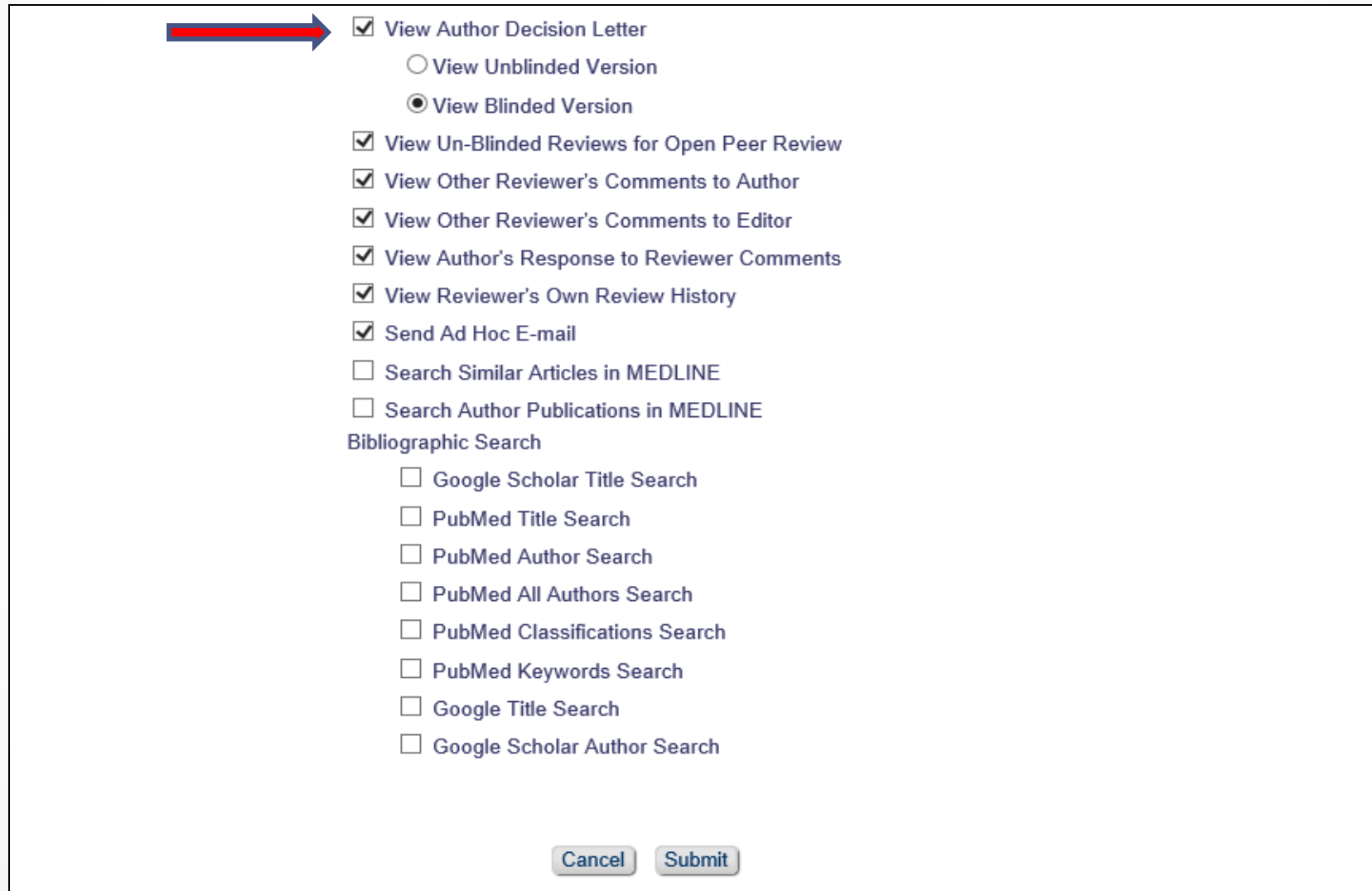
## ☐ Permissions for Completed Assignments Only


- View Final Disposition
- View Un-Blinded Comments

## ☐ General Permissions (Applicable to All Reviewer Pages)

- View Manuscript Number
- View Article Type
- View Article Title

# Role Manager – Reviewer (cont.)



  View Author Decision Letter

- View Unblinded Version
- View Blinded Version

View Un-Blinded Reviews for Open Peer Review

View Other Reviewer's Comments to Author

View Other Reviewer's Comments to Editor

View Author's Response to Reviewer Comments

View Reviewer's Own Review History

Send Ad Hoc E-mail

Search Similar Articles in MEDLINE

Search Author Publications in MEDLINE

**Bibliographic Search**

- Google Scholar Title Search
- PubMed Title Search
- PubMed Author Search
- PubMed All Authors Search
- PubMed Classifications Search
- PubMed Keywords Search
- Google Title Search
- Google Scholar Author Search

# Create & Store Blinded Decision Letter

## ☐ E-mail and Letter Policies

Edit Letters

Define Custom Merge Fields

Set "Email From" Address

Set Non-Email "Preferred Method Of Contact" Correspondence Email Address

Configure Email Import

Set Notify Author Blinding Policy

Set Notify Editor Preference

## Set Notify Author Blinding Policy

When the Editor notifies the Author of the Editor's decision (Notify Author letter), the Editor may review and edit the final letter sent to the Author.

If your journal is running a double-blind system, you should select the option 'Create and store a blinded version of the Notify Author of Decision letter'. When this option is selected, the Author information will be stored as un-merged fields (e.g. %LAST\_NAME%) in the decision letter. This ensures that any modifications to the final decision letter will not reveal information about the Author. Note that the fields will be merged into the letter when it is actually sent to the Author, or if the Editor clicks the 'Preview Letter' button.

If your journal is *not* running a double-blind system, you should select the option 'Do not create and store a blinded version of the Notify Author of Decision letter'. When this option is selected, the Author information will be merged into the letter.

- Create and store a blinded version of the Notify Author of Decision letter
- Do not create and store a blinded version of the Notify Author of Decision letter

Cancel

Submit

# Reviewer Attachment Sanitization

**PolicyManager Main Menu**

[Expand All](#)   [Collapse All](#)

- ⊕ Registration and Login Policies
- ⊕ Status Policies
- ⊕ Submission Policies
- ⊕ Questionnaire Policies
- ⊕ Additional Data Policies
- ⊕ Editor Assignment Policies
- ⊕ Suggest Editor Policies
- ⊕ Reviewer and Editor Form Policies
- ⊕ E-mail and Letter Policies
- ⊕ General Policies
- ⊕ Discussion Forums
- ⊕ Linked Submissions Policies
- ⊕ Conference Submission Policies
- ⊕ Transmittal Policies
- ⊖ **ProduXion Manager**
  - ⊖ Configure Artwork Quality Checking
  - ⊖ Configure Automatic Production Initiation
  - ⊖ Configure Automatic Copy of Target to Actual Publication Information
  - ⊖ Configure Submission Workflows and Production Tasks
  - ⊖ Configure Schedule Group Production Tasks
  - ⊖ Set Author Production Task Deep Link Expiration
  - ⊖ Configure Identifiers Displayed in Production Tracking
  - ⊖ Configure Production Statuses
  - ⊖ Define National Holidays
  - ⊖ Configure Reference Checking
  - ⊖ **Configure Attachment Security**
  - ⊖ Edit Instructions for Attachments
  - ⊖ Set Attachments Deep Link Policy




# Reviewer Attachment - Sanitization

## Configure Attachment Security

Cancel

Submit

### Sanitization



Files uploaded by Editors and Reviewers as part of their work on the submission ("Attachments") may be made available to the Author and other Reviewers. Check the box below and click the 'Submit' button to "sanitize" these files by removing identifying information from the 'File Properties' and 'Track Changes' features of Microsoft Office files, and the 'Properties' of PDF files. PDF annotations (with the exception of dynamic stamps) are also sanitized. Note: any personal identifying information included in the actual text of the file must be removed manually.

If sanitization is enabled, Authors will only have access to the sanitized version of the Attachments. Editors will have access to both the original and sanitized files. Reviewers will have access to the original files unless the checkbox 'Allow other Reviewers access only to Attachments with personal information removed' is selected.

**Important Notes: Any Attachments which are not in Microsoft Office or PDF format will not have identifying information removed. Microsoft Office files include Word, Excel, and PowerPoint.**

**If the checkboxes are unchecked, Authors and/or Reviewers will only have access to the original (unsanitized) files, even if sanitized files have been created.**



Remove Personal Information from Editor/Reviewer Attachments in Microsoft Office or PDF format.



Allow other Reviewers access only to Attachments with personal information removed.

# Reviewer Attachment - Availability

## Availability

Select the applicable option(s) below to designate all uploaded Editor/Reviewer Attachments as available to the Author and/or Reviewers by default. The availability of individual files can also be set manually at various access points throughout the system.

A Reviewer always has access to files he or she uploaded, but if a file is marked as "Available to Reviewers" it will also be available to other Reviewers of the same submission.

	Author	Reviewers
Designate Editor-uploaded files as available by default to:	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Designate Reviewer-uploaded files as available by default to:	<input checked="" type="checkbox"/>	<input type="checkbox"/>

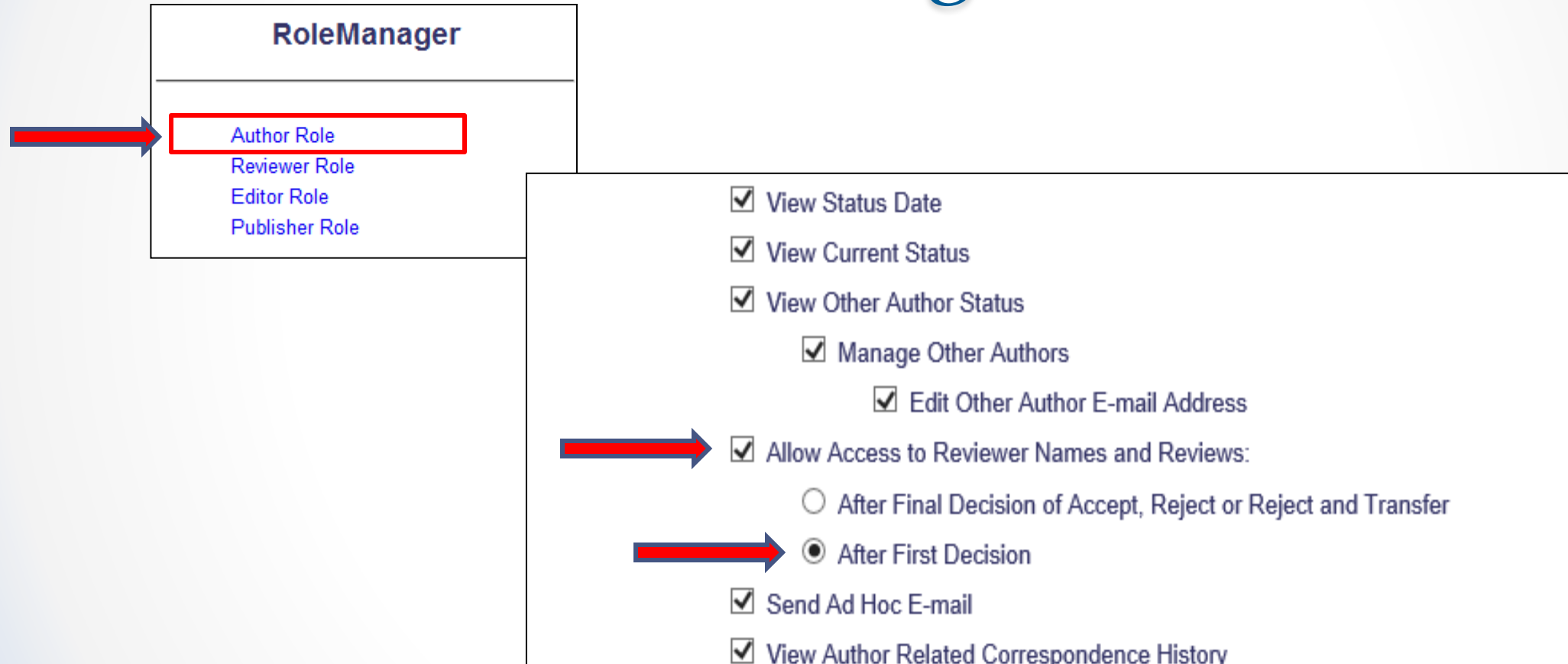
## Author Access

When the final decision is made and the Notification letter is sent to the Author, files the Editors and Reviewers have uploaded that are marked as available to the Author may be included. To append these files to the Notification letter as e-mail attachments, select the option below. Deep links to access the files via the EM interface may also be used in the body of the letter. Both options may be used together, if desired.

Include available Editor/Reviewer Attachments with the Author Notification letter as e-mail attachments

Cancel Submit

# Role Manager – Author: Blind Settings



# Editor Decisions



Forms and Comments



# Required Reviews Complete

## Reviewer Parameters:

Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.

## New and Revised Submissions

*Must be 0 or greater.*

*Set this value to zero to turn off the automatic un-invitation process for all Reviewers who have not responded to an invitation.*

*Set this value to zero to turn off the automatic un-assign process for all Reviewers who have accepted an invitation but not submitted a review on time.*

*Select this box to*

## Reviewer Search

Search My Publication

Search for Reviewers

from All Reviewers

Go

Reviewer Discovery from  ProQuest Community of Scholars

## Review Settings

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 2 [\[Change\]](#) review(s) have been completed.

Automatically Un-assign Reviewers n days after 'Date Review Due'

# Role Manager – Editor (reviews)

**Reviewer Invitations**

- Invite Reviewers
- Un-Invite Reviewers
- Assign Reviewers
- Search Reviewers in Other Journals
- Override Reviewer Due Date
- Propose Reviewers
- Remove Proposed Reviewers
- Select Alternate Reviewers
- Promote Alternate Reviewers
- Link/Un-link Alternate Reviewers
- Remove Alternate Reviewers
- Request Unregistered Reviewers
- Re-open Review
- Edit Reviewer Comments and Ratings after Review is Submitted
- Edit and Complete Reviews Terminated after Accepting Invitation

**Reviewer Search Options:**

- Search by Classification Matches
- Search by Personal Classifications



# Role Manager – Editor (Decisions)

Make a Decision

Terminate Outstanding Reviewer and Editor Assignments when Making a Decision

Skipped in Decision Chain if previous Editor's Decision IS

Skipped in Decision Chain if previous Editor's Decision IS NOT

Notify Author after making a Decision

Draft Notification Letter for any decision

Send Any Notification Letter

Only Notify after selected decisions:

Decision Term	Decision Only	Draft	Draft and Send
Accept	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Revise	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reject	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Super Editor Decision	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reject and Transfer	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Modify Editor Manuscript Rating Answers During Decision Process

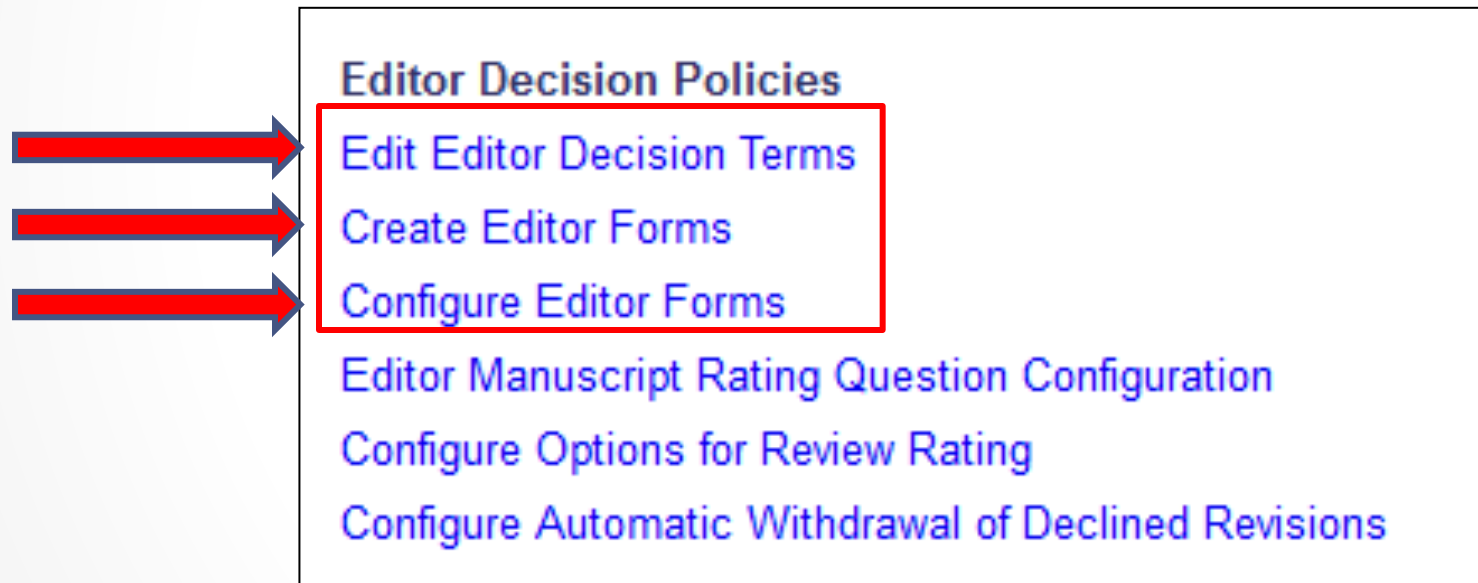
Edit Editor Comments and Ratings After Decision

Notify Author of Editor's Decision when Editor Chain is Complete

And Modify Editor's Decision

# Policy Manager – Editor Forms

## ▣ Reviewer and Editor Form Policies



# Editor Decision Terms

**Editor Decision Terms**

Listed below are the terms used for Editor Decisions. You may Add new terms, Remove, Edit or Hide existing terms. Note that the New Document Status will not take effect until the Author is notified of the Editor Decision. After this, Editors, Publishers and Reviewers with permission to view the current Status will see the New Document Status term; Authors will see the Alternative Text for Authors where one exists, otherwise they will also see the New Document Status term.

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Alternative Text for Authors	Decision Family	
<input type="text" value="1"/>	Accept	Editor Decision - Accept	Reviewer Notification of Accept Decision	Accept		Accept	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="2"/>	Revise	Editor Decision - Revise	Reviewer Notification of Revise Decision	Revise		Revise	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="3"/>	Reject	Editor Decision - Reject	Reviewer Notification of Reject Decision	Reject		Reject	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="4"/>	Super Editor Decision	Editor Decision - Accept	None	Accept		Accept	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="5"/>	Reject and Transfer	Editor Decision - Reject and Transfer	None	Transfer Pending		Reject and Transfer	<a href="#">Remove</a> <a href="#">Edit</a>

Alternative Text for Authors Configuration – Policy Manager > Status Policies > Edit Document Statuses

# Editor Decision Terms

## Add/Edit Editor Decision Term

The Author Notification letter is a letter in the 'Decision' family that notifies the Author of the Editor's decision. You may select one default and multiple optional letters for each Decision Term. If more than one letter is selected, the Editor may choose from these letters at the time of Author Notification

The Reviewer Notification Letter is a letter which can be sent to each Reviewer at the time the Author Notification Letter is sent.

The Document Status is the status displayed in the system when the decision is made.

Each decision term must be mapped to a Decision Family value of Accept, Reject, Revise or Reject and Transfer. This is used internally by Editorial Manager to push submissions through the system properly.

Decision terms mapped to the Reject and Transfer Decision Family trigger additional functionality that allows the Author to agree or decline to transfer the submission to another publication. Please note that you must also configure at least one transfer target publication in AdminManager.

Editor Decision Term:

Author Notification Letter Options:

Accept

Default Optional Letter Purpose

- |                                  |                                     |                                       |
|----------------------------------|-------------------------------------|---------------------------------------|
| <input type="radio"/>            | <input type="checkbox"/>            | None Selected                         |
| <input checked="" type="radio"/> | <input checked="" type="checkbox"/> | Editor Decision - Accept              |
| <input type="radio"/>            | <input type="checkbox"/>            | Editor Decision - Reject              |
| <input type="radio"/>            | <input type="checkbox"/>            | Editor Decision - Revise              |
| <input type="radio"/>            | <input type="checkbox"/>            | Presub Accept                         |
| <input type="radio"/>            | <input checked="" type="checkbox"/> | Editor Smith Accept Decision Letter   |
| <input type="radio"/>            | <input type="checkbox"/>            | Editor Decision - Major Revision      |
| <input type="radio"/>            | <input type="checkbox"/>            | X Reject and Transfer                 |
| <input type="radio"/>            | <input type="checkbox"/>            | Editor Decision - Reject and Transfer |

Reviewer Notification Letter:

Reviewer Notification of Accept Decision

Document Status:

Accept

Decision Family:

Accept

Hide When you **Hide** an Editor Decision Term, the term will no longer be available to Editors making a decision on new or revised manuscripts. Decisions that already use this term *will* appear in historical reports.

Cancel

Submit

# Create Editor Forms

## Create Editor Forms

Default Editor Form Edit



Add New Editor Form


Match Editor Forms to Article Types and Editor Roles

Return to PolicyManager



# Create Editor Forms

## Edit Editor Form - Default Editor Form



Editor Form Name:

Editor Instructions:

[Insert Special Character](#)

A button appears on the Editor Decision and Comments screen called Editor Instructions, if an Editor clicks this button a window will open with custom instructions for the Editor. A journal must enter the instructions for Editor into the EM system, in PolicyManager, in order for this button to appear on the Editor Decision and Comments screen.

TO CONFIGURE: To enter your Editor instructions, go to System Administrator Functions, PolicyManager, Configure Forms and Manuscript Rating Questions, Create Editor Forms and select an Editor form you wish to edit OR create a new form. You will see two text boxes, one called Editor Instructions, the other called Editor Form. Type your instructions for Editors into the Editor Instructions text box. If the box is empty, the Editor Instructions button will not appear on the Editor Decision and Comments screen.

NOTE: The Editor cannot edit anything in this window. They can however copy and paste from this window. This means that you can create multiple types of Editor forms/questionnaires for different Editors and/or Article types. The Editor can copy the appropriate section of text and paste it into the appropriate box.



Editor Form:

[Insert Special Character](#)

Is there a financial or other conflict of interest between your work and that of the authors?

YES  NO

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



# Create Editor Forms (cont.)

Display Custom Review Questions and Responses Grid

---

**Order**

<input type="text" value="1"/>	Custom Review Questions and Responses (when displayed)
<input type="text" value="2"/>	Manuscript Rating Questions (when displayed)
<input type="text" value="3"/>	Editor Form

---

