

# Welcome to EEMUG 2017

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





# Storing & Using Data

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

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



# Agenda

- Additional Manuscript Details
- Additional People Details
- People Notes
  - Traditional
  - Detailed – Tiny URL
- Submission Flags
- Submission Flag History
- People Flags
- Custom Questions
- Reporting

# Additional Manuscript Details

Publisher-defined fields



# Additional Manuscript Details

- Editorial Manager contains many system fields, or, fields that are available across all sites by default
- In many cases, you can choose whether system fields are:
  - Hidden or Visible
  - Hidden, Optional, or Required for any step in the workflow
- Additional Manuscript Details (AMDs) are publisher-defined fields
  - EM may not have a field for the specific information you wish to capture
  - Examples
    - Publish Ahead of Print? Y/N
    - Open Access Paper? Y/N

# Additional Manuscript Details

- There are several ways to configure an AMD:
  - Text (200 character limit)
  - Date
  - Integer
  - Decimal
  - Notes (20,000 character limit)
  - List Value (drop-down only)
- You can also choose whether these AMDs apply to all Article Types (eg, Publish Ahead of Print) or just for select Article Types (eg, Rapid Review Required)



# Additional Manuscript Details

- AMD fields may also be configured at various points in the EM interface:
  - Link on Details page (Hide, Display only, Editable)
  - Display on Details page (Hide, Display only, Editable)
  - Transmittal Form (Hide, Display only, Editable, Required)
  - Display for Invited Submissions (Hide or Display only)
  - Search Submissions (Hide or Display only)
  - Search Proposals (Hide or Display only)
  - Schedule Group TOC (Hide, Display only, Editable)

Display on Details Page



# Additional Manuscript Details

## Details for Manuscript Number: Unassigned "EMUG 2016 Additional Manuscript Details"

Cancel

Save

Save and Close

[Abstract](#) [Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Reviewers Proposed by Editors](#) [Additional Information](#)

**Publish Ahead of Print**

Please Choose ▼

Display 'Fast-Track to Publication' Flag

**Open Access Paper**

Please Choose ▼

Display 'Open Access Paper' Flag

**Additional Manuscript Details:**

[Add/Edit Additional Manuscript Details](#)

# Additional Manuscript Details

## Details for Manuscript Number: Unassigned "EMUG 2016 Additional Manuscript Details"

Cancel

Save

Save and Close

[Abstract](#) [Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Reviewers Proposed by Editors](#) [Additional Information](#)

<b>Publish Ahead of Print</b>	Yes ▼	Display 'Fast-Track to Publication' Flag <input type="checkbox"/>
<b>Open Access Paper</b>	No ▼	Display 'Open Access Paper' Flag <input type="checkbox"/>
<b>Additional Manuscript Details:</b>	<a href="#">Add/Edit Additional Manuscript Details</a>	



Link on Details page

# Additional Manuscript Details

## Details for Manuscript Number: Unassigned "EMUG 2016 Additional Manuscript Details"

Cancel

Save

Save and Close

[Abstract](#) [Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Reviewers Proposed by Editors](#) [Additional Information](#)

**Publish Ahead of Print**

Please Choose ▼

Display 'Fast-Track to Publication' Flag

**Open Access Paper**

Please Choose ▼

Display 'Open Access Paper' Flag

**Additional Manuscript Details:**

[Add/Edit Additional Manuscript Details](#)

# Additional Manuscript Details

**Details for Manuscript**

[Abstract](#) [Manuscript Notes](#) [Produ](#)

**Publish Ahead of Print** Please

**Open Access Paper** Please Choose ▾

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

**al Manuscript Details"**

[Proposed by Editors](#) [Additional](#)

Fast-Track to Publication' Flag

Display 'Open Access Paper' Flag

www.editorialmanager.com says:

You are navigating to a new page; changes you have made to data on the main Details page may be lost. On returning to this page, fields that also appear on the new page will not reflect any changes made on the new page until you refresh or reload the page.

Click Cancel to return to the details page and save your changes.  
Click OK to continue to the new page without saving changes.

Prevent this page from creating additional dialogs.

**OK** Cancel

# Additional Manuscript Details

**Additional Manuscript Details for Submission Number DEMOKH122-S-16-00010**  
**"EMUG 2016 Additional Manuscript Details"**

Cancel

Save and Close

<b>Publish Ahead of Print</b>	Please Choose ▼	Display 'Fast-Track to Publication' Flag : <input type="checkbox"/>	
<b>Open Access Paper</b>	Please Choose ▼	Display 'Open Access Paper' Flag : <input type="checkbox"/>	
<b>Pub Code</b>	ABC		

Cancel

Save and Close



# Additional Manuscript Details

## Additional Manuscript Details for Submission Number DEMOKH122-S-16-00010 "EMUG 2016 Additional Manuscript Details"

Cancel

Save and Close

<b>Publish Ahead of Print</b>	Please Choose ▼	Display 'Fast-Track to Publication' Flag : <input type="checkbox"/>	
<b>Open Access Paper</b>	Please Choose ▼	Display 'Open Access Paper' Flag : <input type="checkbox"/>	
<b>Pub Code</b>	ABC		

Cancel

Save and Close

# Search Submissions

# Additional Manuscript Details

**Search**

[Search Submissions](#) [Search People](#)

**Editor 'To-Do' List**

My Pending Assignments (2)

- [New Submissions Requiring Assignment](#) (1)
- Revised Submissions Requiring Assignment (0)
- Submissions with Required Reviews Complete (0)
- Submissions Requiring Additional Reviewers (0)
- Submissions with One or More Late Reviews (0)
- [Submissions with Active Discussions](#) (1)

# Additional Manuscript Details

## Search submissions selection criteria

Display search results in PowerGrid

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#)

Search Definition: Choose Saved Search ▼

Remove Search Definition

Edit Selected Search Definition

Share Selected Search Definition

Run Selected Search Definition

[Help with Searching](#)

[Insert Special Character](#)

[Value Options](#)

[Advanced Criteria](#)

(	Criterion	Is/Is not	Selector	Value	)
▼	Manuscript Number ▼	is ▼	Contains ▼	<input type="text"/>	▼

Clear

Search



# Additional Manuscript Details

Help with Searching      Insert Special Character      Value Options      Advanced Criteria

(	Criterion	Is/Is not	Selector	Value	)
▼	Manuscript Number	is ▼	Contains ▼	<input type="text"/>	▼
	Handling Editor First Name				
	Handling Editor Last Name				
	Assigned Editor First Name				
	Assigned Editor Last Name				
	Final Disposition Term				
	<b>Publish Ahead of Print</b>				
	Open Access Paper				
	Pub Code				
	Submission Flag Name				
	Sub. Target Online Publication Date				
	Sub. Actual Online Publication Date				
	Schedule Group Notes				
	Schedule Group Target Online Publication Date				
	Schedule Group Target Publication Date				
	Schedule Group Target Publication Volume				
	Schedule Group Target Publication Issue				
	Target Number of Pages				
	Black and White Image Count				
	Color Image Count				
	Discussion Topic				
	Discussion Comments				

▼ Add

Clear    Search

Editorial Menu  
Production Tasks Menu  
Production Status Grid

you can copy and paste Values from there.  
t entered in this format, you will be required to re-enter the date in the specified format.  
ite a search. We recommend entering as much criteria as you know. The more refined the  
re the evaluations are carried out in the right order. If you do not use parentheses, or  
valuated first.  
e.  
ied" Selector.

# Additional Manuscript Details

Help with Searching      Insert Special Character      Value Options      Advanced Criteria

(	Criterion	Is/Is not	Selector	Value	)
▼	Publish Ahead of Print	is	Equal To	▼ Yes Yes No	▼

Add

# Additional Manuscript Details

Save Search

Download Search Results

Search Again

[Switch to Production View](#)

Page: 1 of 1 (1 total submissions)

Display 100 ▼

<a href="#">Action</a>	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted	Reviewers
<ul style="list-style-type: none"> <li><a href="#">View Submission</a></li> <li><a href="#">CrossCheck/iThenticate Results (97%)</a></li> <li><a href="#">Details</a></li> <li><a href="#">Initiate Discussion</a></li> <li><a href="#">History</a></li> <li><a href="#">File Inventory</a></li> <li><a href="#">Edit Submission</a></li> <li><a href="#">Classifications</a></li> <li><a href="#">Remove Submission</a></li> <li><a href="#">Send Back to Author</a></li> <li><a href="#">Assign Editor</a></li> <li><a href="#">Set Final Disposition</a></li> <li><a href="#">Initiate Production</a></li> <li><a href="#">Similar Articles in MEDLINE</a></li> <li><a href="#">OVID - Title and Keywords</a></li> <li><a href="#">BJ Author Search</a></li> <li><a href="#">BJ Title Search</a></li> <li><a href="#">Send E-mail</a></li> <li><a href="#">Linked Submissions</a></li> </ul>		Kate M Horgan	EMUG 2016 Additional Manuscript Details	Rapid Communication			10: First Major Term	Manuscript Submitted	04 May 2016	04 May 2016	

Page: 1 of 1 (1 total submissions)

Display 100 ▼

# Configurations



# Additional Manuscript Details

- AMDs are configured in PolicyManager while access to view and edit AMDs is configured in RoleManager
- PolicyManager
  - Add/Edit Additional Manuscript Details Fields
  - Define Custom Details Page Layout
  - Edit Transmittal Form Layout
- RoleManager
  - Editor/Publisher Roles
    - View Additional Manuscript Details
    - Edit Additional Manuscript Details

# Additional Manuscript Details

## PolicyManager Main Menu

[Expand All](#)   [Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊕ **Submission Policies**
- ⊕ **Questionnaire Policies**
- ⊖ **Additional Data Policies**
  - [Add/Edit Additional People Detail Fields](#)
  - [Add/Edit Additional Manuscript Detail Fields](#)**
  - [Add/Edit Legacy Manuscript Fields for Conversion](#)
  - [Edit Additional Invitation Details](#)
- ⊕ **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**

# Additional Manuscript Details

## Add/Edit Additional Manuscript Detail Fields

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

Add

Order	Description	Associated with Flag	Actions
<input type="text" value="3"/>	Publish Ahead of Print	 Fast-Track to Publication	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="5"/>	Open Access Paper	 Open Access Paper	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="6"/>	Pub Code		<a href="#">Remove</a> <a href="#">Edit</a>

Update Item Order

Add

# Additional Manuscript Details

### Add Additional Manuscript Detail Field

**Field Description:** [Insert Special Character](#)  
PMC Deposit Required  
*Maximum 256 characters*

**Field Type:**

**Maximum Field Length:**   
*(A value from 1 to 200)*

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

None  
 Single Value (enter value below)  
[Insert Special Character](#)

Display Field for All Article Types  
 Display Field for Selected Article Types

Original Study	<input type="checkbox"/>	<a href="#">Select</a>	<i>On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box.</i>
Editorial	<input type="checkbox"/>	<a href="#">All</a>	
Review	<input type="checkbox"/>	<a href="#">Clear</a>	
Rapid Communication	<input type="checkbox"/>	<a href="#">All</a>	

*On a Mac, hold down the 'Command' key while using the mouse to select the desired items.*



# Additional Manuscript Details

### Add Additional Manuscript Detail Field

**Field Description:** [Insert Special Character](#)

PMC Deposit Required  
*Maximum 256 characters*

**Field Type:**

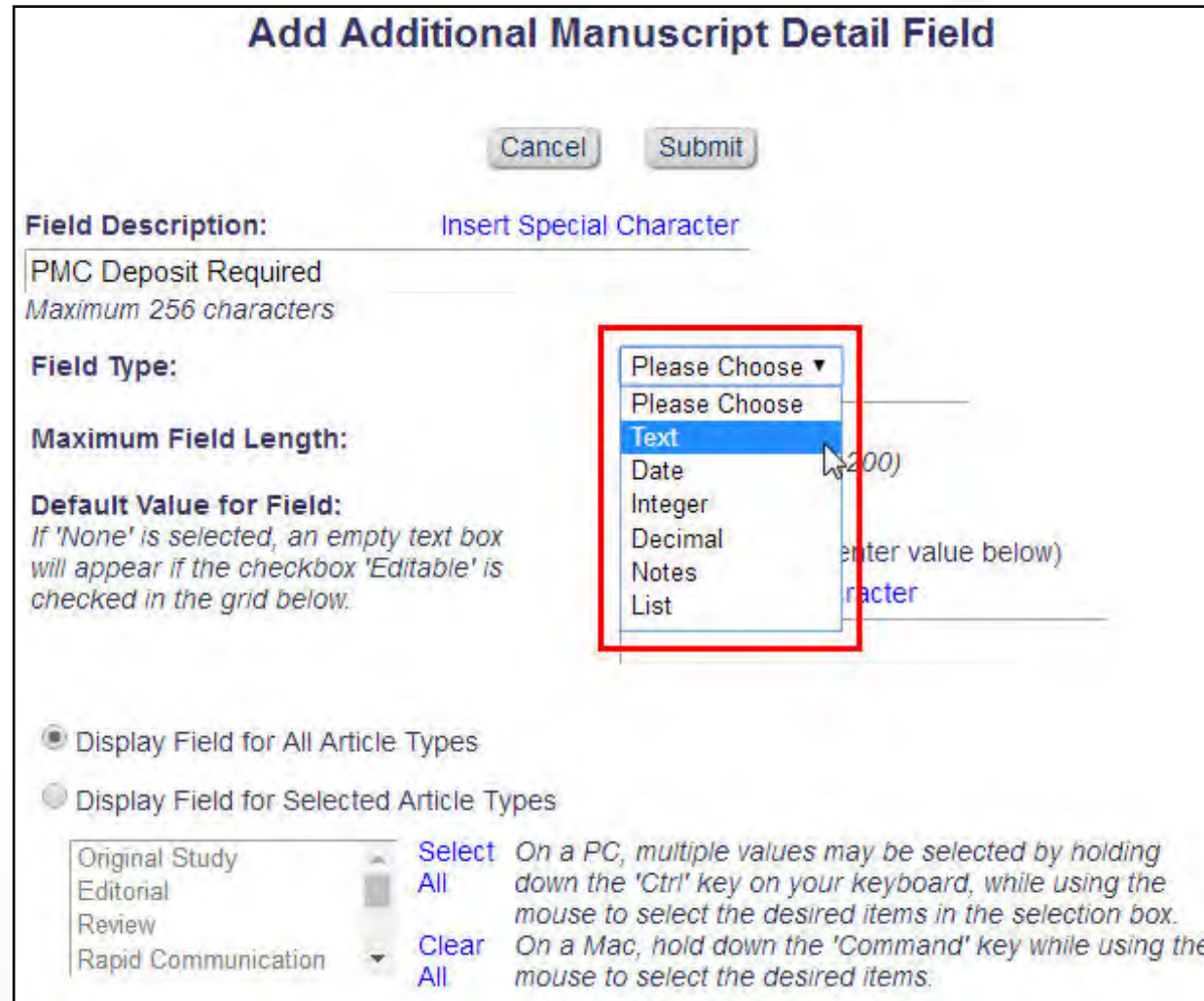
**Maximum Field Length:**

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

Display Field for All Article Types  
 Display Field for Selected Article Types

Original Study	<input type="checkbox"/>	Select	<i>On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box.</i>
Editorial	<input type="checkbox"/>	All	
Review	<input type="checkbox"/>	Clear	
Rapid Communication	<input type="checkbox"/>	All	

*On a Mac, hold down the 'Command' key while using the mouse to select the desired items.*



# Additional Manuscript Details

### Add Additional Manuscript Detail Field

**Field Description:** [Insert Special Character](#)  
PMC Deposit Required  
*Maximum 256 characters*

**Field Type:** Text ▼

**Maximum Field Length:** 200  
*(A value from 1 to 200)*

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

None  
 Single Value (enter value below)  
[Insert Special Character](#)

Display Field for All Article Types  
 Display Field for Selected Article Types

Original Study	▲	Select	<i>On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box.</i>
Editorial	■	All	
Review	■	Clear	
Rapid Communication	▼	All	

*On a Mac, hold down the 'Command' key while using the mouse to select the desired items.*

# Additional Manuscript Details

### Add Additional Manuscript Detail Field

**Field Description:** [Insert Special Character](#)  
PMC Deposit Required  
*Maximum 256 characters*

**Field Type:**

**Maximum Field Length:**   
*(A value from 1 to 200)*

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

None  
 Single Value (enter value below)  
[Insert Special Character](#)

Display Field for All Article Types  
 Display Field for Selected Article Types

Original Study	<input type="checkbox"/>	Select	<i>On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, hold down the 'Command' key while using the mouse to select the desired items.</i>
Editorial	<input type="checkbox"/>	All	
Review	<input type="checkbox"/>	Clear	
Rapid Communication	<input type="checkbox"/>	All	



# Additional Manuscript Details

### Add Additional Manuscript Detail Field

**Field Description:** [Insert Special Character](#)  
PMC Deposit Required  
*Maximum 256 characters*

**Field Type:**

**Maximum Field Length:**   
*(A value from 1 to 200)*

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

[Insert Special Character](#)

**Display Field for All Article Types**

Display Field for Selected Article Types

Original Study	<input type="checkbox"/>	<a href="#">Select</a>	<i>On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box.</i>
Editorial	<input type="checkbox"/>	<a href="#">All</a>	
Review	<input type="checkbox"/>	<a href="#">Clear</a>	<i>On a Mac, hold down the 'Command' key while using the mouse to select the desired items.</i>
Rapid Communication	<input type="checkbox"/>	<a href="#">All</a>	



# Additional Manuscript Details

### Add Additional Manuscript Detail Field

**Field Description:** [Insert Special Character](#)  
PMC Deposit Required  
*Maximum 256 characters*

**Field Type:**

**Maximum Field Length:**   
*(A value from 1 to 200)*

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

None  
 Single Value (enter value below)  
[Insert Special Character](#)

Display Field for All Article Types

Display Field for Selected Article Types

<input checked="" type="checkbox"/> Original Study	<input type="checkbox"/>
<input type="checkbox"/> Editorial	<input type="checkbox"/>
<input type="checkbox"/> Review	<input type="checkbox"/>
<input type="checkbox"/> Rapid Communication	<input type="checkbox"/>

**Select All** *On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box.*

**Clear All** *On a Mac, hold down the 'Command' key while using the mouse to select the desired items.*

# Additional Manuscript Details

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Custom Metadata ID: <input type="text"/>		<a href="#">Help</a>	
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	
Search Submission	<input type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

# Additional Manuscript Details

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Custom Metadata ID: <input type="text"/>		<a href="#">Help</a>	
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	
Search Submission	<input type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

# Additional Manuscript Details

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Custom Metadata ID: <input type="text"/>			<a href="#">Help</a>
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	
Search Submission	<input type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A



# Additional Manuscript Details

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Custom Metadata ID: <input type="text"/>		<a href="#">Help</a>	
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	
Search Submission	<input type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

# Additional Manuscript Details

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Custom Metadata ID: <input type="text"/>		<a href="#">Help</a>	
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	
Search Submission	<input type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

# Additional Manuscript Details

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Custom Metadata ID: <input type="text"/>		<a href="#">Help</a>	
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	
Search Submission	<input type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

# Additional Manuscript Details

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Custom Metadata ID: <input type="text"/> <a href="#">Help</a>			
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	
Search Submission	<input type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A



# Additional Manuscript Details

## RoleManager

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Author Role

Reviewer Role

Editor Role

Publisher Role

# Additional Manuscript Details

- Add/Edit External Correspondence
  - Add Attachments to External Correspondence
- View All Submissions
- View Completed Reviews Grid in Main Menu
- View Additional Manuscript Details
  - Edit Additional Manuscript Details
- View Notes on Manuscript Details
- Edit Notes on Manuscript Details
- Turn On Manuscript Notes Flag
- Turn Off Manuscript Notes Flag
- View Production Notes
- Edit Production Notes

# Additional Manuscript Details

- Links to EM Help for additional configuration help:
  - [http://www.editorialmanager.com/robohelp/13.0/EditorialManagerHelp/User-Defined Fields for Submissions and People.htm](http://www.editorialmanager.com/robohelp/13.0/EditorialManagerHelp/User-DefinedFieldsforSubmissionsandPeople.htm)
  - [http://www.editorialmanager.com/robohelp/13.0/EditorialManager Help/Details Page.htm](http://www.editorialmanager.com/robohelp/13.0/EditorialManagerHelp/DetailsPage.htm)
  - [http://www.editorialmanager.com/robohelp/13.0/EditorialManager Help/Transmittal Forms.htm](http://www.editorialmanager.com/robohelp/13.0/EditorialManagerHelp/TransmittalForms.htm)

# Reporting



# Additional Manuscript Details

- Tables to know:
  - Additional Manuscript Details Fields
  - Additional Manuscript Details Values
- These two tables can be joined with any number of other views and tables to report on AMDs
- Some view recommendations
  - Manuscript Status History View
  - Editors & Submissions
  - Authors & Submissions
- First join desired view to the AMD Field Values table using Document ID
- Next, AMD Field Values table to AMD Fields using Unique Identifier and AMD ID

# Additional Manuscript Details

The screenshot shows a software interface with a menu bar containing 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the menu bar is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'SQL'. A 'Results' dropdown is set to '1000'. The main area contains the text 'Please choose a View or Table' and a dropdown menu with 'Authors & Submissions View' selected and highlighted by a red box. Below this are two rows of field selection: 'Additional Manuscript Details Field Values' with 'Unique Document ID' selected, and 'Additional Manuscript Details Fields' with 'Unique Identifier' selected. A 'Continue to Fields' button is at the bottom.

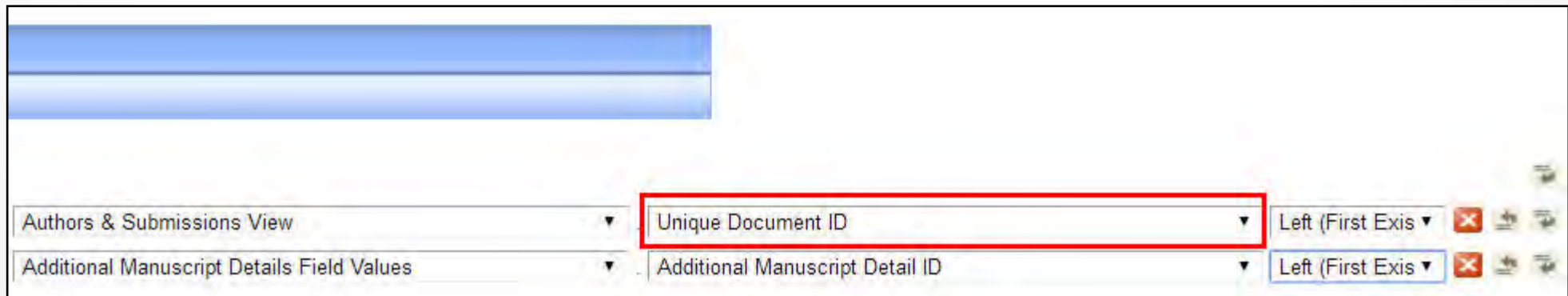
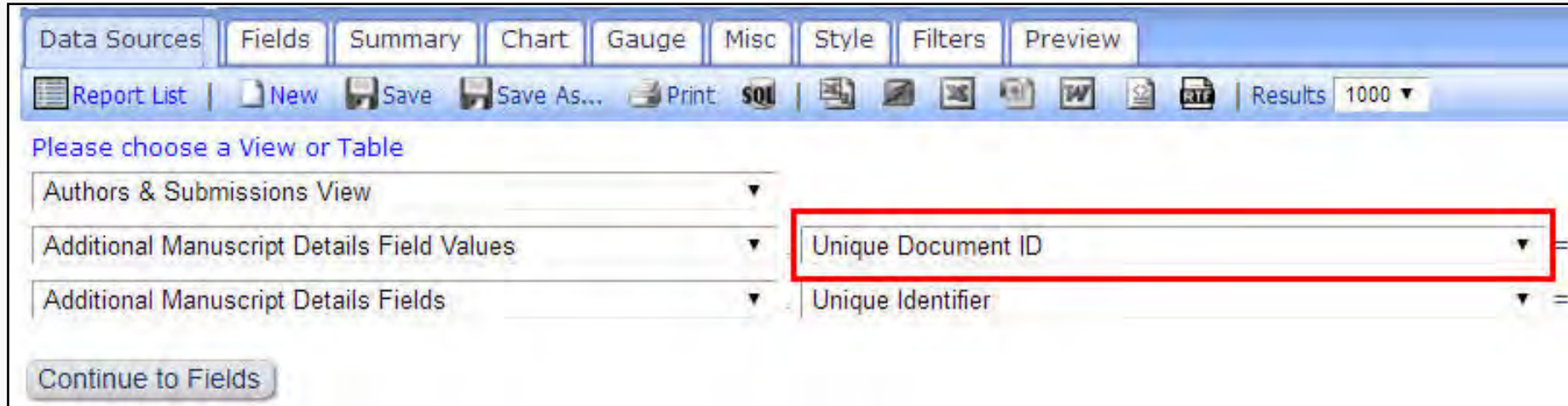
The screenshot shows a software interface with a blue header bar. Below it, a dropdown menu is open, showing 'Authors & Submissions View' selected. Below this are two rows of field selection: 'Authors & Submissions View' with 'Unique Document ID' selected, and 'Additional Manuscript Details Field Values' with 'Additional Manuscript Detail ID' selected. To the right of each row are sorting options: 'Left (First Exis' with a dropdown arrow, a red 'X' icon, and a refresh icon.

# Additional Manuscript Details

This screenshot shows a report builder interface with a menu bar at the top containing 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the menu bar is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'SQL', along with a 'Results' dropdown set to '1000'. The main area prompts the user to 'Please choose a View or Table'. Three options are listed in a dropdown menu: 'Authors & Submissions View', 'Additional Manuscript Details Field Values' (highlighted with a red box), and 'Additional Manuscript Details Fields'. To the right of the dropdown, two fields are visible: 'Unique Document ID' and 'Unique Identifier', each with a dropdown arrow and an equals sign. A 'Continue to Fields' button is located at the bottom left.

This screenshot shows a report builder interface with a menu bar at the top containing 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the menu bar is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'SQL', along with a 'Results' dropdown set to '1000'. The main area prompts the user to 'Please choose a View or Table'. Three options are listed in a dropdown menu: 'Authors & Submissions View' (highlighted with a red box), 'Additional Manuscript Details Field Values', and 'Additional Manuscript Details Fields'. To the right of the dropdown, two fields are visible: 'Unique Document ID' and 'Additional Manuscript Detail ID', each with a dropdown arrow and an equals sign. Below each field is a 'Left (First Exis)' dropdown menu with a red 'X' icon and a right-pointing arrow icon.

# Additional Manuscript Details





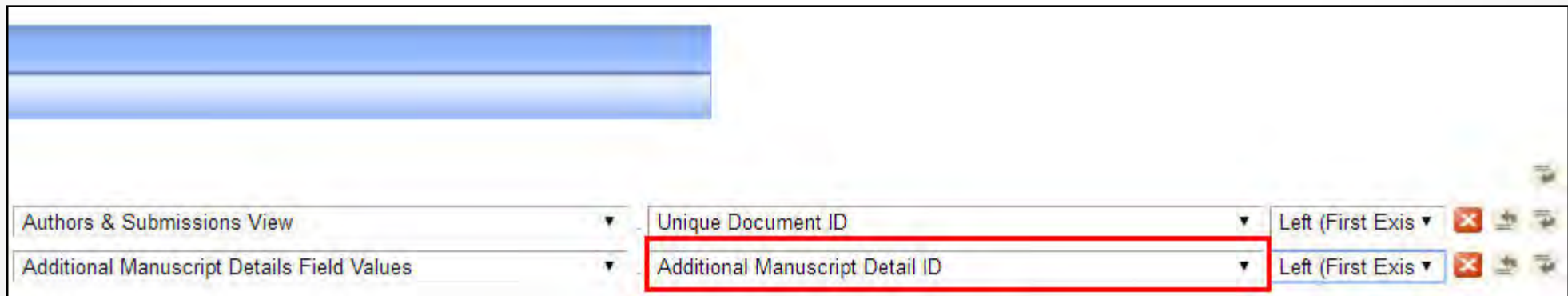
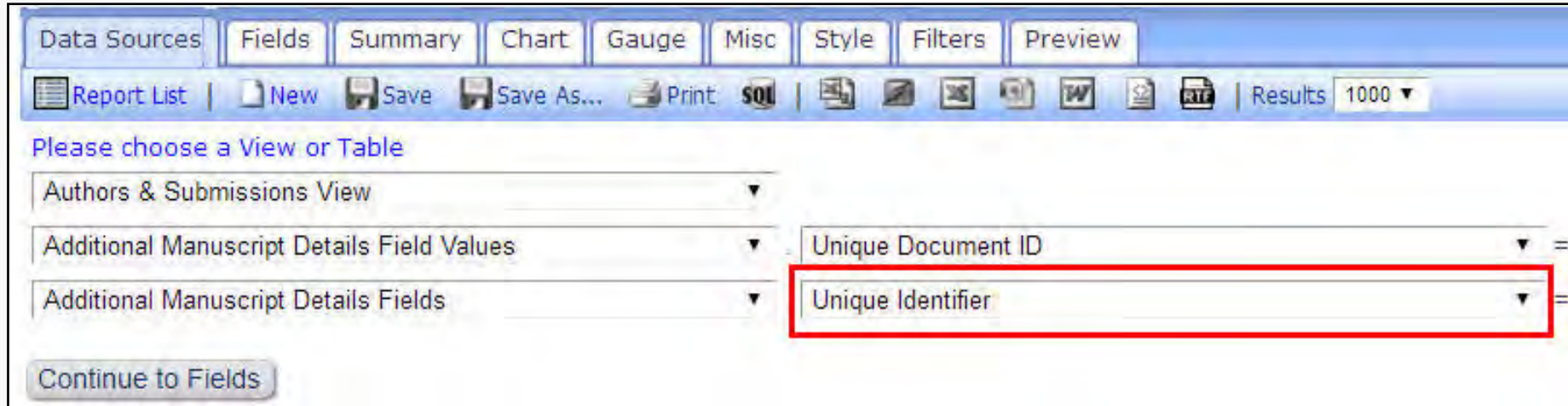
# Additional Manuscript Details

This screenshot shows a report configuration interface with a menu bar (Data Sources, Fields, Summary, Chart, Gauge, Misc, Style, Filters, Preview) and a toolbar (Report List, New, Save, Save As..., Print, SQL, etc.). The main area prompts the user to 'Please choose a View or Table'. Three options are listed in dropdown menus: 'Authors & Submissions View', 'Additional Manuscript Details Field Values', and 'Additional Manuscript Details Fields'. The 'Additional Manuscript Details Fields' option is highlighted with a red box. To the right, two field selection dropdowns are visible: 'Unique Document ID' and 'Unique Identifier', both with equals signs (=) to their right. A 'Continue to Fields' button is located at the bottom left.

This screenshot shows a similar report configuration interface. The top part of the screen is obscured by a blue horizontal bar. The main area shows two dropdown menus: 'Authors & Submissions View' and 'Additional Manuscript Details Field Values'. The 'Additional Manuscript Details Field Values' option is highlighted with a red box. To the right, two field selection dropdowns are visible: 'Unique Document ID' and 'Additional Manuscript Detail ID'. The 'Additional Manuscript Detail ID' dropdown is highlighted with a blue box. Both field selection dropdowns have 'Left (First Exis' text and a red 'X' icon to their right. A toolbar with various icons is visible on the far right.



# Additional Manuscript Details



# Additional Manuscript Details

This screenshot shows a software interface with a menu bar at the top containing 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the menu bar is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'SQL', along with a 'Results' dropdown set to '1000'. The main area contains the text 'Please choose a View or Table' and three rows of configuration options:

Authors & Submissions View	▼		
Additional Manuscript Details Field Values	▼	Unique Document ID	▼ =
Additional Manuscript Details Fields	▼	Unique Identifier	▼ =

A 'Continue to Fields' button is located at the bottom left of the configuration area.

This screenshot shows a software interface with a table at the bottom. The table has two rows, both of which are highlighted in blue. The first row is 'Authors & Submissions View' with 'Unique Document ID' and 'Left (First Exis)'. The second row is 'Additional Manuscript Details Field Values' with 'Additional Manuscript Detail ID' and 'Left (First Exis)'. The 'Left (First Exis)' text in both rows is enclosed in a red box. To the right of the table are several small icons, including a red 'X', a magnifying glass, and a refresh symbol.

Authors & Submissions View	▼	Unique Document ID	▼	Left (First Exis) ▼	✖	🔍	↻
Additional Manuscript Details Field Values	▼	Additional Manuscript Detail ID	▼	Left (First Exis) ▼	✖	🔍	↻

# Additional Manuscript Details

The screenshot shows a software interface for configuring a report. At the top, there are tabs for 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the tabs is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'Results' (set to 1000). The main area is titled 'Records' and contains a table with the following columns: 'Field', 'Description', 'Sort', 'VG', 'A', 'Function', and 'Format'. The table lists five fields: 'Manuscript Number', 'Article Title', 'Corresponding Author First Name', 'Field Description', and 'Drop Down Item ID'. Each row has a set of control icons on the right, including a red 'X', a list icon, a refresh icon, a gear icon, and a vertical double-headed arrow. At the bottom left, there is a checkbox for 'Add Subtotals'. At the bottom, there are four buttons: 'Quick Add', 'Add Pivot', 'Continue to Summary', and 'Preview'.

Field	Description	Sort	VG	A	Function	Format
Manuscript Number	Manuscript Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Article Title	Article Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Corresponding Author First Name	Corresponding Authr	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Field Description	Additional Manuscri	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Drop Down Item ID	Additional Manuscri	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	0,000
---		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

# Additional Manuscript Details

The screenshot displays the 'Filters' tab in a report design tool. The interface includes a menu bar with options like 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. A toolbar contains icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and 'Results' (set to 1000). The main area is a table for defining filters:

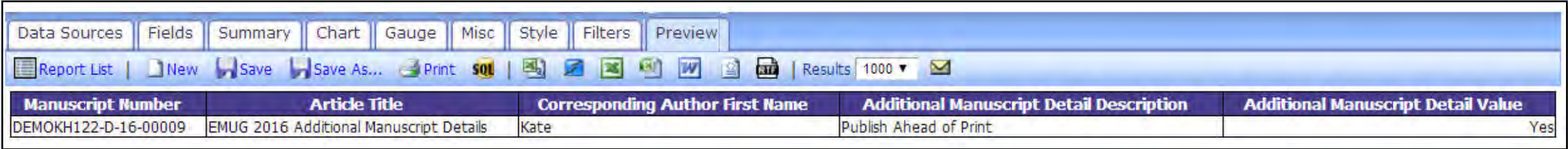
Filter Field	Operator	Value(s)	Blank Param
1 Field Description	Equals (Multiple)	Open Access Paper Pub Code Publish Ahead of Print	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2 Drop Down Item ID	Isn't Blank		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3 ...	...		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Below the table, there are several options:

- Show Filters In Report Description
- Require  Parameters in Viewer
- Filter Logic
-



# Additional Manuscript Details



The screenshot shows a software interface with a menu bar and a toolbar. The menu bar includes options like 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. The toolbar contains icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and a 'Results' dropdown menu set to '1000'. Below the toolbar is a table with five columns: 'Manuscript Number', 'Article Title', 'Corresponding Author First Name', 'Additional Manuscript Detail Description', and 'Additional Manuscript Detail Value'. The table contains one row of data.

Manuscript Number	Article Title	Corresponding Author First Name	Additional Manuscript Detail Description	Additional Manuscript Detail Value
DEMOKH122-D-16-00009	EMUG 2016 Additional Manuscript Details	Kate	Publish Ahead of Print	Yes



# Additional People Details

Publisher-defined fields

# Additional People Details

- Editorial Manager contains many system fields for user records
  - Display to new or existing registrants as optional or required fields (eg, Title, Degree, Institution)
  - In select instances some fields may be designated as hidden (eg, secondary fields, personal identifiers)
  - Some fields are visible only to an Editor with permission to Search People(eg, Available as a Reviewer? Editorial Board Member?)
- Additional People Details (APDs) are journal-defined fields for capturing user-specific data
  - EM may not have a field for the specific information you wish to capture
  - Examples
    - Membership ID
    - Continuing Education Participant

# Additional People Details

- Additional People Details can be configured as:
  - Text (200 character limit)
  - Date
  - Integer
  - Decimal
  - Notes (20,000 character limit)
  - List (Drop-down list only)
- APDs are not role specific so once configured they will appear across all user records
- APDs are only visible to Editors with appropriate view and/or edit permissions
- APDs are not never visible to the user when they choose to Update My Information

# Additional People Details

- APDs may be configured to display:
  - Additional People Details link (Hide, Display only, Editable)
  - People Activity Details (Hide, Display only)
  - Transmittal Form (Hide, Display only, Editable, Required)
- APDs can be transmitted as custom metadata to production
  - Must be configured to at least display on the transmittal form to include in export

# Additional People Detail Page



# Additional People Details

**Search**

[Search Submissions](#) [Search People](#)

**Editor 'To-Do' List**

My Pending Assignments (2)

- [New Submissions Requiring Assignment](#) (1)
- Revised Submissions Requiring Assignment (0)
- Submissions with Required Reviews Complete (0)
- Submissions Requiring Additional Reviewers (0)
- Submissions with One or More Late Reviews (0)
- [Submissions with Active Discussions](#) (1)

# Additional People Details

**Search People**

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Last Name ▼	Begins With ▼	Horgan	ALL ▼   END ▼
Last Name ▼	Begins With ▼		END ▼
Last Name ▼	Begins With ▼		

# Additional People Details

**Search People**

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Last Name ▼	Begins With ▼	Horgan	ALL ▼   END ▼
Last Name ▼	Begins With ▼		END ▼
Last Name ▼	Begins With ▼		

# Additional People Details

**Search People**

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Last Name ▼	Begins With ▼	Horgan	ALL ▼   END ▼
Last Name ▼	Begins With ▼		END ▼
Last Name ▼	Begins With ▼		

# Additional People Details

Download Search Results

Page: 1 of 1 (2 total People Matches)

Display 50 results per page.

Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input type="checkbox"/>	Paul Horgan	Jackson Hole	MO	UNITED STATES	[Author]	[Reviewer]		
<input type="checkbox"/>	Kate M Horgan, MD	Danvers	MA	UNITED STATES	[Author]	[Reviewer]	[Managing Editor]	[Publisher]

Page: 1 of 1 (2 total People Matches)

Display 50 results per page.

Merge People Records

Download Search Results



# Additional People Details

**User Information**

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

User Name \*

Password \*  [Password Rules](#)

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Default Login Menu

Available as a Reviewer? Yes  No

Board Member? Yes  No

Forbidden as a Reviewer? Yes  No

Reviewer Role \*

Publisher Role \*

Editorial Role \*

Editor Description

[Activity Details](#)

[Additional People Details](#)

# Additional People Details

## Additional People Details - Kate M Horgan, MD

Cancel

Save and Close

**Continuing Education Participant**

Yes ▼

**Date of First Review**

(mm/dd/yyyy)

**Membership ID**

Cancel

Save and Close

# Additional People Details

**Additional People Details - Kate M Horgan, MD**

<b>Continuing Education Participant</b>	Yes ▼	
<b>Date of First Review</b>	05/01/2015 <input type="button" value="📅"/> (mm/dd/yyyy)	
<b>Membership ID</b>	546873158987	

# People Activity

# Additional People Details

### User Information

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

User Name \*

Password \*  [Password Rules](#)

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Default Login Menu

Available as a Reviewer? Yes  No

Board Member? Yes  No

Forbidden as a Reviewer? Yes  No

Reviewer Role \*

Publisher Role \*

Editorial Role \*

Editor Description



# Additional People Details

Page: 1 of 1 (1 total submissions) 1

Action	Author Name	Manuscript Number	Article Type	Section/Category	Article Title
<ul style="list-style-type: none"><li>View Submission</li><li>CrossCheck/iThenticate Results (97%)</li><li>Details</li><li>Initiate Discussion</li><li>History</li><li>File Inventory</li><li>Edit Submission</li><li>Send Back to Author</li><li>Remove Submission</li><li>Classifications</li><li>Assign Editor</li><li>Set Final Disposition</li><li>Initiate Production</li><li>Similar Articles in MEDLINE</li><li>OVID Title and Keywords Search</li><li>BJ Author Search</li><li>BJ Title Search</li><li>Send E-mail</li><li>Linked Submissions</li></ul>	Kate M Horgan MD   		Rapid Communicat	Basic Science Section	EMUG 2016 Additional Manuscript Details

# Additional People Details

## Additional People Details

Continuing Education Participant:

Yes

## Personal Classifications (\* indicates match with document)

Classification	Experience Ranking
10: First Major Term	
10.200: Minor Term under First	
10.400: Another Minor Term under First	
20: Second Major Term	

# Configurations

# Additional People Details

- APDs are configured very similar to AMDs
- PolicyManager
  - Add/Edit Additional People Details
  - Edit Transmittal Form Layout
- RoleManager
  - Editor/Publisher Roles
    - Search People
    - View People Activity Details
    - View Additional People Details
    - Edit Additional People Details

# Additional People Details

**PolicyManager Main Menu**

---

[Expand All](#)   [Collapse All](#)

- ▣ **Registration and Login Policies**
- ▣ **Status Policies**
- ▣ **Submission Policies**
- ▣ **Questionnaire Policies**
- ▣ **Additional Data Policies**
  - [Add/Edit Additional People Detail Fields](#)
  - [Add/Edit Additional Manuscript Detail Fields](#)
  - [Add/Edit Legacy Manuscript Fields for Conversion](#)
  - [Edit Additional Invitation Details](#)
  
- ▣ **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**



# Additional People Details

## Add/Edit Additional People Detail Fields

Listed below are the Additional People Detail Fields added for your journal. The values for these fields are entered manually on the Additional People Details page or the Transmittal Form.

[Add](#)

Order	Description	Actions
<input type="text" value="1"/>	Continuing Education Participant	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="2"/>	Date of First Review	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="3"/>	Membership ID	<a href="#">Remove</a> <a href="#">Edit</a>

[Update Item Order](#)

[Add](#)

[Back to PolicyManager](#)

# Additional People Details

### Add Additional People Detail Field

**Field Description:** [Insert Special Character](#)

Award Recipient

*Maximum 256 characters*

**Field Type:**

**Maximum Field Length:**

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

None

Single Value (enter value below)

# Additional People Details

**Add Additional People Detail Field**

**Field Description:** [Insert Special Character](#)

*Maximum 256 characters*

**Field Type:**

**Maximum Field Length:**

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

- Date ▼
- Please Choose
- Text
- Date
- Integer
- Decimal
- Notes
- List

# Additional People Details

### Add Additional People Detail Field

**Field Description:** [Insert Special Character](#)

Award Recipient  
*Maximum 256 characters*

**Field Type:**

**Maximum Field Length:**

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

None  
 Single Value (enter value below)



# Additional People Details

### Add Additional People Detail Field

**Field Description:** [Insert Special Character](#)

*Maximum 256 characters*

**Field Type:**

**Maximum Field Length:**

**Default Value for Field:**  
*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

None  
 Single Value (enter value below)



# Additional People Details

Page	Hide	Editable	Required	Help Text
Additional People Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
People Activity Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

# Additional People Details

Page	Hide	Editable	Required	Help Text
Additional People Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
People Activity Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

# Additional People Details

Page	Hide	Editable	Required	Help Text
Additional People Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
People Activity Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

# Additional People Details

## RoleManager

---

Author Role

Reviewer Role

Editor Role

Publisher Role

# Additional People Details

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
  - Editorial Assistant
  - Editor-in-Chief
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
  - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs



# Additional People Details

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
    - Editorial Assistant
    - Editor-in-Chief
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
  - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs

# Additional People Details

**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
    - Editorial Assistant
    - Editor-in-Chief
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
  - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs

# Additional People Details

- Helpful links to additional configuration steps:
  - [http://www.editorialmanager.com/robohelp/13.0/Editorial\\_Manager\\_Help/User-Defined\\_Fields\\_for\\_Submissions\\_and\\_People.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/User-Defined_Fields_for_Submissions_and_People.htm)

# Reporting

# Additional People Details

- Tables to know:
  - Additional People Details Fields
  - Additional People Details Values
- These two tables can be joined with any number of other views and tables to report on AMDs
- Some view recommendations
  - People & Address
  - People & Classifications
  - People & Keywords
- First join desired view to the APD Field Values table using People ID and People Unique ID
- Next, APD Field Values table to APD Fields using Unique ID for the field and APD ID



# Additional People Details

Data Sources | Fields | Summary | Chart | Gauge | Misc | Style | Filters | Preview

Report List | New | Save | Save As... | Print | SQL | Results 1000

Please choose a View or Table

People & Address View ▼

Additional People Detail Field Values ▼ People ID ▼ =

Additional People Detail Fields ▼ Unique ID for the field ▼ =

Continue to Fields

People & Address View ▼ People Unique ID ▼ Left (First Exis ▼ ✕

Additional People Detail Field Values ▼ Additional People Details ID ▼ Left (First Exis ▼ ✕

# Additional People Details

Records 1000

Field	Description	Sort	VG	A	Function	Format						
First Name	First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	---	---	<input type="checkbox"/>					
Last Name	Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	---	---	<input type="checkbox"/>					
E-mail Address	E-mail Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	---	---	<input type="checkbox"/>					
Field description	Field description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	---	---	<input type="checkbox"/>					
Text Value	Text Value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	---	---	<input type="checkbox"/>					
---		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	---	---	<input type="checkbox"/>					

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

# Additional People Details

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | Results 1000

	Filter Field	Operator	Value(s)	Blank Param
1	Field description	Equals (Select)	Membership ID	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
2	Text Value	Isn't Blank		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
3	...	...		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

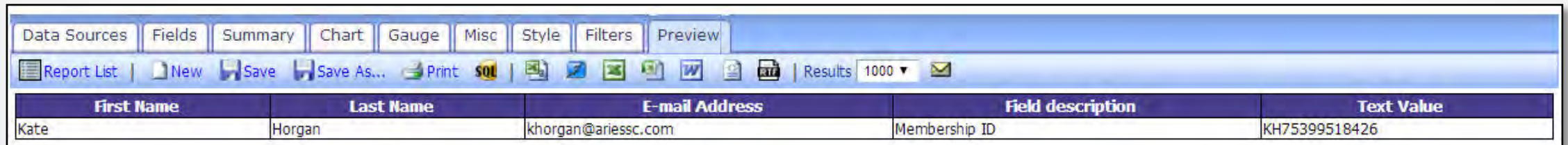
Show Filters In Report Description

Require  Parameters in Viewer

Filter Logic

Preview

# Additional People Details



The screenshot shows a report viewer interface with a toolbar and a data table. The toolbar includes buttons for 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the toolbar is a menu bar with 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'SQL'. To the right of the menu bar are icons for various applications and a 'Results' dropdown set to '1000'. The data table has five columns: 'First Name', 'Last Name', 'E-mail Address', 'Field description', and 'Text Value'. The first row contains the data for 'Kate Horgan' with email 'khorgan@ariessc.com' and a 'Membership ID' of 'KH75399518426'.

First Name	Last Name	E-mail Address	Field description	Text Value
Kate	Horgan	khorgan@ariessc.com	Membership ID	KH75399518426

# People Notes Field

Traditional way to store what you really think



# People Notes

- The traditional People Notes box appears at the end of every user record
  - Free-text box used historically to capture specific information about the user to share amongst those with permission to View and/or Edit People Notes
  - Examples include:
    - Award recipient information
    - Excellent Reviewer
    - Banned Author
    - Unresponsive Reviewer
- People Notes are searchable through the Search People and Invite Reviewers interface

# People Notes

## Search

[Search Submissions](#)

[Search People](#)

## Editor 'To-Do' List

My Pending Assignments (2)

[New Submissions Requiring Assignment](#) (1)

Revised Submissions Requiring Assignment (0)

Submissions with Required Reviews Complete (0)

Submissions Requiring Additional Reviewers (0)

Submissions with One or More Late Reviews (0)

[Submissions with Active Discussions](#) (1)

# People Notes

## Search People

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Last Name ▼	Begins With ▼		ALL ▼   END ▼
Last Name	Begins With ▼		END ▼
First Name	Begins With ▼		
Institution	Begins With ▼		
City			
State			
Country			
E-mail Address			
Phone Number			
Personal Classifications			
Personal Keywords			
<b>People Notes</b>			
People Flag Name			
Registration Date			
Proxy Registration			

[Editor Main Menu](#)  
[Production Tasks Menu](#)  
[Production Status Grid](#)

# People Notes

## Search People - Search Results

Choose the criterion for selecting People Records.

[Help with Searching](#)

[Insert Special Character](#)

[Register New User](#)

Criterion	Selector	Value	User Role
People Notes ▼	Begins With ▼	amazing	ALL ▼   END ▼
Last Name ▼	Begins With ▼		END ▼
Last Name ▼	Begins With ▼		

Clear

Search

# People Notes

## Search People - Search Results

Choose the criterion for selecting People Records.

[Help with Searching](#)

[Insert Special Character](#)

[Register New User](#)

Criterion	Selector	Value	User Role
People Notes ▼	Begins With ▼	amazing	ALL ▼   END ▼
Last Name ▼	Begins With ▼		END ▼
Last Name ▼	Begins With ▼		

Clear

Search



# People Notes

Page: 1 of 1 (1 total People Matches) [Download Search Results](#) Display  results per page.

Merge People	Name ▲▼	City ▲▼	State or Province ▲▼	Country ▲▼	Author Role	Reviewer Role ▲▼	Editor Role ▲▼	Publisher Role ▲▼
<input type="checkbox"/>	Kate M Horgan, MD  	Danvers	MA	UNITED STATES	[Author]	[Reviewer]	[Managing Editor]	[Publisher]

Page: 1 of 1 (1 total People Matches) [Download Search Results](#) Display  results per page.

[Merge People Records](#)

# People Notes

**People Notes**

5/4/2016 - The most amazing reviewer of all time.

Cancel Submit

# People Notes

**People Notes**

5/4/2016 - The most **amazing** reviewer of all time.

Cancel Submit

# People Notes

## People Notes

6/1/2016 - Not such a great author.

5/4/2016 - The most amazing reviewer of all time.

# People Notes

## New Editor Assignments - Stacey Jellerson

**Contents:** These are submissions that have been Assigned to the Editor. They require one of the following: another Editor arrows to change the sort order.

Page: 1 of 1 (1 total submissions)

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼
<a href="#">View Submission Details</a> ▾ <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Assign Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Submit Editor's Decision and Comments</a> <a href="#">Send E-mail</a>	DEMOKH122-D-16-00009	Rapid Communication	Basic Science Section	EMUG 2016 Additional Manuscript Details

Page: 1 of 1 (1 total submissions)



# People Notes

## Reviewer Selection Summary - Submission DEMOKH122-D-16-00009

Kate M Horgan, MD  
EMUG 2016 Additional Manuscript Details

### Reviewer Search

Search My Publication

Search for Reviewers

from All Reviewers

Go

### 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-invite Reviewers who do not respond to an invitation within 3 [\[Change\]](#) day(s). [\(more...\)](#)

Automatically un-assign Reviewers who do not complete a review within 0 [\[Change\]](#) day(s) of the review due date. [\(more...\)](#)

# People Notes

**Search for Reviewers**

[Help with Searching](#) [Insert Special Character](#)

(	Criterion	Is/Is not	Selector	Value	)	
▼	Last Name	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	Last Name	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	First Name	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	E-mail Address	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	Position	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	Department	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	Institution	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	City	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	State	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	Country	is ▼	Begins With ▼		▼	OR ▼ Remove
▼	People Notes	is ▼	Begins With ▼		▼	Remove
	People Flag Name					
	Personal Classifications					
	Personal Keywords					
	Secondary Last Name					
	Secondary First Name					

▼ Add

Clear Search

# Configurations

# People Notes

- People Notes are a basic field on the user record page that can be accessed with two RoleManager permissions
- RoleManager
  - Editor/Publisher Roles
    - View People Notes
    - Edit People Notes
- If you plan to store sensitive information be sure who you allow access to this field
  - If you have an Associate Editor who is also a consistently late reviewer, be sure the editor does not have access to the People Notes fields if you plan to note him as such

# Additional People Details

## RoleManager

---

Author Role

Reviewer Role

Editor Role

Publisher Role



# Additional People Details

**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

Editorial Assistant

Editor-in-Chief
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
  - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs

# People Notes

- Helpful Links to configuration options:
  - [http://www.editorialmanager.com/robohelp/13.0/Editorial\\_Manager\\_Help/Notes\\_field\\_in\\_People\\_Record.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Notes_field_in_People_Record.htm)

# Reporting

# People Notes

- People Notes are available in many different views and tables as a field
- No need to join together multiple tables or views unless needed for the specific report
- Some view recommendations
  - People & Address
  - Authors & Submissions
  - Reviewers & Submissions
- Table recommendation
  - People Table
- Use the People Table to join to any other tables or views in your report
- Most common join would be with Unique People ID

# Detailed People Notes

Let's get specific



# Detailed People Notes

- EM v 12.1 introduced the Detailed People Notes functionality
- These notes are automatically timestamped upon clicking the Submit Note button
- The Operator who entered the Detailed People Note is also automatically captured.
- Therefore, the context of the notes field can be kept to only the context of the note. Not any additional identifying and/or versioning information
- Detailed People Notes, unlike the traditional People Notes, can be synched across EM Portal linked sites

# Detailed People Notes

### Detailed People Notes

Add New Note: 

Character Count: 0 / 4000

Operator ▲▼	Note	Date ▲▼	Action
No Detailed People Notes are available			

Display this section at the top of this page

# Detailed People Notes

### Detailed People Notes

**Add New Note:** ⓘ

Kate is the most amazing reviewer of all time

Character Count: 45 / 4000

Submit Note

View/Print All

Operator	Note	Date	Action
No Detailed People Notes are available			

Display this section at the top of this page

# Detailed People Notes

### Detailed People Notes

**Add New Note:** ⓘ

Kate is the most amazing reviewer of all time

Character Count: 45 / 4000

**Submit Note**

View/Print All

Operator	Note	Date	Action
No Detailed People Notes are available			

Display this section at the top of this page

# Detailed People Notes

### Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Operator ▲▼	Note	Date ▲▼	Action
Kate M Horgan, MD	Kate is the most amazing reviewer of all time	04 May 2016	

Display this section at the top of this page



# Detailed People Notes

### Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Submit Note

View/Print All

Operator	Note	Date	Action
Kate M Horgan, MD	Kate is the most amazing reviewer of all time	04 May 2016	

Display this section at the top of this page

# Detailed People Notes

### Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Submit Note

View/Print All

Operator	Note	Date	Action
Kate M Horgan, MD	Kate is the most amazing reviewer of all time	04 May 2016	

Display this section at the top of this page

# Detailed People Notes

### Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Submit Note

View/Print All

Operator	Note	Date	Action
Kate M Horgan, MD	Kate is the most amazing reviewer of all time	04 May 2016	

Display this section at the top of this page

# Detailed People Notes


### Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Submit Note

View/Print All

Operator	Note	Date	Action
Kate M Horgan, MD	Kate is the most amazing reviewer of all time	04 May 2016	

Display this section at the top of this page

# Detailed People Notes

### Detailed People Notes

Add New Note: [i](#)

Character Count: 0 / 4000

Submit Note

View/Print All

Operator	Note	Date	Action
Kate M Horgan, MD	Kate is the most amazing reviewer of all time	04 May 2016	

Display this section at the top of this page



# Detailed People Notes

**Detailed People Notes**

Add New Note: [i](#)

Character Count: 0 / 4000

Operator	Note	Date	Action
Kate M Horgan, MD	Kate is the most amazing reviewer of all time	04 May 2016	

Display this section at the top of this page

# Detailed People Notes

[Open Special Character Palette](#)

## Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

---

**Ms Kate M Horgan**  

Proxy-Registered:  
07 Feb 2014  
(Data Verified by User)

Last Modified:  
04 May 2016

### Detailed People Notes

Add New Note: 

Character Count: 0 / 4000

Operator	Note	Date	Action
Kate M Horgan, MD	Kate is the most amazing reviewer of all time	04 May 2016	

Display this section at the top of this page

# Detailed People Notes

### Search People

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Detailed People Notes ▼	Contains ▼	<input type="text"/>	ALL ▼ END ▼
Last Name	Begins With ▼	<input type="text"/>	END ▼
First Name			
Institution	Begins With ▼	<input type="text"/>	
City			
State			
Country			
E-mail Address			
Phone Number			
Personal Classifications			
Personal Keywords			
People Notes			
Detailed People Notes			
People Flag Name			
Registration Date			
Proxy Registration			

[Editor Main Menu](#)  
[Production Tasks Menu](#)  
[Production Status Grid](#)

# Detailed People Notes

**Search People**

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Detailed People Notes ▼	Contains ▼	reviewer	ALL ▼
Last Name ▼	Begins With ▼		END ▼
Last Name ▼	Begins With ▼		

# Detailed People Notes

**Search People**

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Detailed People Notes ▼	Contains ▼	reviewer	ALL ▼
Last Name ▼	Begins With ▼		END ▼
Last Name ▼	Begins With ▼		



# Detailed People Notes

Download Search Results

Page: 1 of 1 (1 total People Matches) Display 50 results per page.

Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input type="checkbox"/>	Kate M Horgan, MD  	Danvers	MA	UNITED STATES	[Author]	[Reviewer]	[Managing Editor]	[Publisher]

Page: 1 of 1 (1 total People Matches) Display 50 results per page.

Merge People Records

Download Search Results

# Configurations

# Detailed People Notes

- Detailed People Notes have a few more permissions as they can be shared across EM-Portal sites
- RoleManager
  - Editor/Publisher Roles
    - View Detailed People Notes
    - Manage Detailed People Notes
    - View Portal-Shared People Notes
    - Manager Portal-Shared People Notes

# Detailed People Notes

## RoleManager

---

Author Role

Reviewer Role

Editor Role

Publisher Role

# Detailed People Notes

**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

Editorial Assistant

Editor-in-Chief
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
  - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs



# Detailed People Notes

- Helpful links to configuration options:
  - [http://www.editorialmanager.com/robohelp/13.0/Editorial\\_Manager\\_Help/Detailed\\_People\\_Notes.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Detailed_People_Notes.htm)
  - [http://www.editorialmanager.com/robohelp/13.0/Editorial\\_Manager\\_Help/Inter-journal\\_Resource\\_Sharing.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Inter-journal_Resource_Sharing.htm)

# Reporting

# Detailed People Notes

- A new table called Detailed People Notes is available to capture these notes and may be joined with other views and tables
- The Detailed People Notes are available in several tables and views
- Join with any other table that includes people data on Unique People ID to report on this information
- Some view recommendations
  - People & Address
  - Authors & Submissions
  - Reviewers & Submissions
- Source publication is available in this field and should be used for determining where a Detailed People Note originated

# Detailed People Notes

This screenshot shows the top portion of a report designer interface. At the top, there is a horizontal menu with tabs for 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below this menu is a toolbar containing icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and several other utility icons. To the right of the toolbar, it says 'Results 1000' with a dropdown arrow. The main area below the toolbar contains the text 'Please choose a View or Table'. There are two dropdown menus: the first is set to 'People & Address View' and the second is set to 'Detailed People Notes'. To the right of the second dropdown is a text input field containing 'People ID' and an equals sign. At the bottom left of this section is a button labeled 'Continue to Fields'.

This screenshot shows a report preview window. The top part of the window is obscured by two thick blue horizontal bars. At the bottom of the window, there is a footer area with three dropdown menus. The first dropdown is set to 'People & Address View', the second to 'People Unique ID', and the third to 'Left (First Exis'. To the right of these dropdowns are standard window control icons: a red 'X' for close, a magnifying glass for zoom, and a refresh icon.

# Detailed People Notes

The screenshot shows a software interface with a menu bar at the top containing 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the menu bar is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'SQL'. The main area displays a table of fields for a report named 'Detailed People Notes'. The table has columns for 'Field', 'Description', 'Sort', 'VG', 'A', 'Function', and 'Format'. The fields listed are 'First Name', 'Last Name', 'Detailed People Notes', 'Poster's Name', 'Post Date', and an empty row. Each field row includes a dropdown arrow, a description, checkboxes for 'Sort', 'VG', and 'A', a 'Function' dropdown, a 'Format' dropdown, and a set of control icons (a red 'X', a list icon, a refresh icon, a gear icon, and a vertical double-headed arrow). Below the table is a checkbox labeled 'Add Subtotals'. At the bottom, there are four buttons: 'Quick Add', 'Add Pivot', 'Continue to Summary', and 'Preview'.

Field	Description	Sort	VG	A	Function	Format
First Name	First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Last Name	Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Detailed People Notes	Detailed People Not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Poster's Name	Poster's Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Post Date	Post Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	Short Date
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview



# Detailed People Notes

Data Sources | Fields | Summary | Chart | Gauge | Misc | Style | Filters | Preview

Report List | New | Save | Save As... | Print | SQL | [Icons] | Results 1000 [Icon]

	Filter Field	Operator	Value(s)	Blank	Param
1	Detailed People Notes	Isn't Blank		<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	...	...		<input type="checkbox"/>	<input checked="" type="checkbox"/>

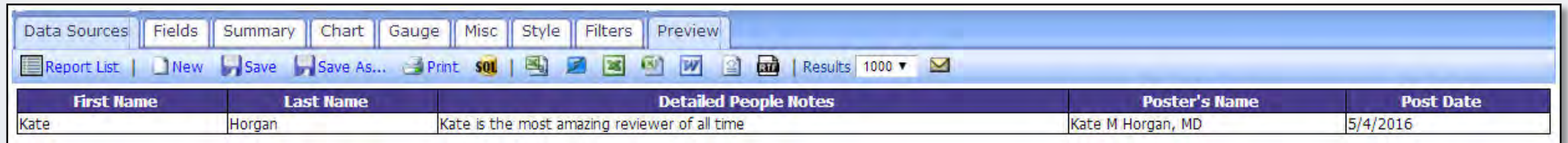
Show Filters In Report Description

Require [...] Parameters in Viewer

Filter Logic [Ex:(1 OR 2) AND (3 OR 4)]

Preview

# Detailed People Notes



The screenshot shows a software interface with a menu bar and a toolbar. The menu bar includes 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. The toolbar contains icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and a 'Results' dropdown menu set to '1000'. Below the toolbar is a table with the following data:

First Name	Last Name	Detailed People Notes	Poster's Name	Post Date
Kate	Horgan	Kate is the most amazing reviewer of all time	Kate M Horgan, MD	5/4/2016

# Submission Flags

Graphical highlights in Editorial Manager

# Submission Flags

- Submission Flags are icons that may be appended to submissions at any time in the workflow
- Editors/Publisher roles may be given access to:
  - View Submission Flags
  - Turn on Submission Flags
  - Turn off Submission Flags
- Submission Flags are searchable throughout Editorial Manager
  - Search Submissions (EM/PM)
  - Search Proposals
- Submission Flags can also be tied to Additional Manuscript Details (AMD) field
- Submission Flags may be designated as EM only, EM/PM, or PM only
- Submission Flags can also be configured to display in Flag History

# Submission Flags



A screenshot of a web application interface showing a dropdown menu titled "Action". The menu items are listed in blue text. The "Details" item is highlighted with a red rectangular box, and a small flag icon is visible next to it. The other items in the menu are: View Submission, CrossCheck/iThenticate Results (97%), History, Classifications, Unassign Editor, File Inventory, Edit Submission, Invite Reviewers, Solicit Commentary, Notify Editor, Set Final Disposition, Initiate Production, Similar Articles in MEDLINE, OVID Title and Keywords Search, BJ Author Search, BJ Title Search, Send E-mail, and Linked Submissions.

- View Submission
- CrossCheck/iThenticate Results (97%)
- Details 
- History
- Classifications
- Unassign Editor
- File Inventory
- Edit Submission
- Invite Reviewers
- Solicit Commentary
- Notify Editor
- Set Final Disposition
- Initiate Production
- Similar Articles in MEDLINE
- OVID Title and Keywords Search
- BJ Author Search
- BJ Title Search
- Send E-mail
- Linked Submissions



# Submission Flags



# Submission Flags

<b>Submission Flags:</b>	⚑
<b>Select Submissions Flags:</b>	<a href="#">Add/Edit Submission Flags</a>

# Submission Flags






## Submission Flags - Manuscript Number DEMOKH122-D-16-00009 "EMUG 2016 Additional Manuscript Details"

Check the box of the flag(s) you want to display for this submission. ([more...](#))

Cancel

Submit

### SET SUBMISSION FLAGS

Display	Flag	Flag Name
<input type="checkbox"/>		Potential Duplicate Submission
<input type="checkbox"/>		Fast-Track to Publication
<input type="checkbox"/>		Discussion in Progress
<input type="checkbox"/>		Conflict of Interest Forms Required
<input type="checkbox"/>		Copyright Transfer Forms Required
<input type="checkbox"/>		Manuscript Will Require Significant Edits
<input type="checkbox"/>		Conflict of Interest Forms Received
<input type="checkbox"/>		Copyright Transfer Forms Received
<input type="checkbox"/>		Open Access Paper

# Submission Flags

## Submission Flags - Manuscript Number DEMOKH122-D-16-00009 "EMUG 2016 Additional Manuscript Details"

Check the box of the flag(s) you want to display for this submission. ([more...](#))


Cancel

Submit

### SET SUBMISSION FLAGS

Display	Flag	Flag Name
<input type="checkbox"/>		Potential Duplicate Submission
<input type="checkbox"/>		Fast-Track to Publication
<input type="checkbox"/>		Discussion in Progress
<input checked="" type="checkbox"/>		Conflict of Interest Forms Required
<input checked="" type="checkbox"/>		Copyright Transfer Forms Required
<input checked="" type="checkbox"/>		Manuscript Will Require Significant Edits
<input type="checkbox"/>		Conflict of Interest Forms Received
<input type="checkbox"/>		Copyright Transfer Forms Received
<input type="checkbox"/>		Open Access Paper

# Submission Flags

<b>Submission Flags:</b>	
<b>Select Submissions Flags:</b>	<a href="#">Add/Edit Submission Flags</a>



# Submission Flags



# Submission Flags

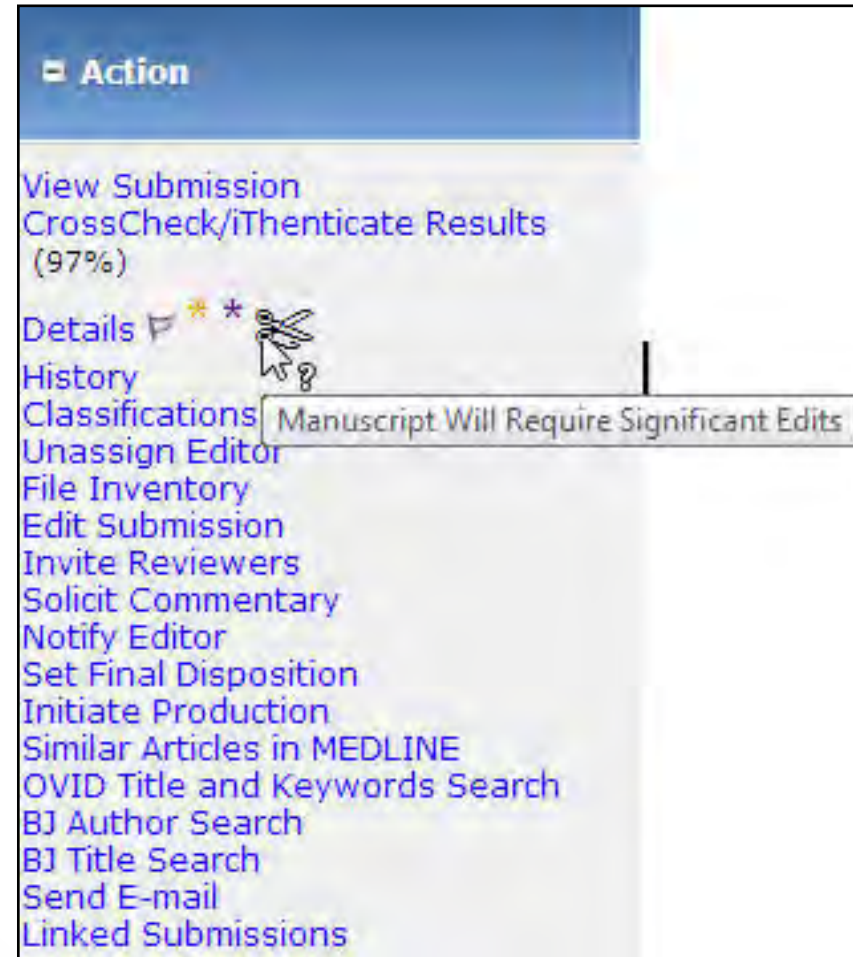
**Action**

[View Submission](#)  
[CrossCheck/iThenticate Results \(97%\)](#)

[Details](#) 




[History](#)  
[Classifications](#)  
[Unassign Editor](#)  
[File Inventory](#)  
[Edit Submission](#)  
[Invite Reviewers](#)  
[Solicit Commentary](#)  
[Notify Editor](#)  
[Set Final Disposition](#)  
[Initiate Production](#)  
[Similar Articles in MEDLINE](#)  
[OVID Title and Keywords Search](#)  
[BJ Author Search](#)  
[BJ Title Search](#)  
[Send E-mail](#)  
[Linked Submissions](#)

# Submission Flags



The image shows a screenshot of a web application interface for managing submissions. At the top, there is a blue header bar with the word "Action" and a small square icon to its left. Below the header, a list of actions is displayed in blue text. The actions are: "View Submission", "CrossCheck/iThenticate Results (97%)", "Details", "History", "Classifications", "Unassign Editor", "File Inventory", "Edit Submission", "Invite Reviewers", "Solicit Commentary", "Notify Editor", "Set Final Disposition", "Initiate Production", "Similar Articles in MEDLINE", "OVID Title and Keywords Search", "BJ Author Search", "BJ Title Search", "Send E-mail", and "Linked Submissions".

The "Details" action is highlighted with a mouse cursor. To its right, there are two yellow star icons and a red flag icon. A tooltip box is open over the red flag icon, containing the text "Manuscript Will Require Significant Edits".

- View Submission
- CrossCheck/iThenticate Results (97%)
- Details   
- History
- Classifications
- Unassign Editor
- File Inventory
- Edit Submission
- Invite Reviewers
- Solicit Commentary
- Notify Editor
- Set Final Disposition
- Initiate Production
- Similar Articles in MEDLINE
- OVID Title and Keywords Search
- BJ Author Search
- BJ Title Search
- Send E-mail
- Linked Submissions

Manuscript Will Require Significant Edits

# Submission Flags

Help with Searching      Insert Special Character      Value Options      Advanced Criteria

(	Criterion	Is/Is not	Selector	Value	)
▼	Submission Flag Name	is	Equal To	Potential Duplicate Submiss	▼

Clear    Search    Add

Help with Searching

- Potential Duplicate Submission
- Fast-Track to Publication
- Discussion in Progress
- Conflict of Interest Forms Required
- Copyright Transfer Forms Required
- Manuscript Will Require Significant Edit
- Conflict of Interest Forms Received
- Copyright Transfer Forms Received
- Open Access Paper

# Submission Flags

Search Submissions - Search Results										
Submission Flag Name is equal to 'Manuscript Will Require Significant Edits'										
<a href="#">Save Search</a> <a href="#">Download Search Results</a> <a href="#">Search Again</a>										
<a href="#">Switch to Production View</a>										
Page: 1 of 1 (1 total submissions)										Display
Action	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted
<a href="#">View Submission</a> <a href="#">CrossCheck/iThenticate Results (97%)</a> <a href="#">Details</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">Notify Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">OVID - Title and Keywords</a> <a href="#">BJ Author Search</a> <a href="#">BJ Title Search</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOKH122-D-16-00009	Kate M Horgan	EMUG 2016 Additional Manuscript Details	Rapid Communication			10: First Major Term	With Editor	04 May 2016	04 May 2016



# Submission Flags

**Search Submissions - Search Results**

Submission Flag Name is equal to 'Manuscript Will Require Significant Edits'

[Save Search](#) [Download Search Results](#) [Search Again](#)

[Switch to Production View](#)

Page: 1 of 1 (1 total submissions) Display

Action	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted
<a href="#">View Submission</a> <a href="#">CrossCheck/iThenticate Results (97%)</a> <a href="#">Details</a> * * ✂ <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">Notify Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">OVID - Title and Keywords</a> <a href="#">BJ Author Search</a> <a href="#">BJ Title Search</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOKH122-D-16-00009	Kate M Horgan	EMUG 2016 Additional Manuscript Details	Rapid Communication			10: First Major Term	With Editor	04 May 2016	04 May 2016

# Submission Flags



**Search Submissions - Search Results**

Submission Flag Name is equal to 'Manuscript Will Require Significant Edits'

[Save Search](#) [Download Search Results](#) [Search Again](#)

[Switch to Production View](#)

Page: 1 of 1 (1 total submissions) Display

Action	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted
<a href="#">View Submission</a> <a href="#">CrossCheck/iThenticate Results (97%)</a> <a href="#">Details</a>   <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">Notify Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">OVID - Title and Keywords</a> <a href="#">BJ Author Search</a> <a href="#">BJ Title Search</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOKH122-D-16-00009	Kate M Horgan	EMUG 2016 Additional Manuscript Details	Rapid Communication			10: First Major Term	With Editor	04 May 2016	04 May 2016

# Submission Flags

### Save Search Criteria

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

Criteria	Search Criteria Name
Submission Flag Name is equal to 'Manuscript Will Require Significant Edits'	Manuscript Edits Required

Show this Search in Main Menus

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

# Submission Flags

### Save Search Criteria

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

Criteria	Search Criteria Name
Submission Flag Name is equal to 'Manuscript Will Require Significant Edits'	Manuscript Edits Required
	<input type="checkbox"/> Show this Search in Main Menus

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



# Submission Flags

### Save Search Criteria

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

Criteria	Search Criteria Name
Submission Flag Name is equal to 'Manuscript Will Require Significant Edits'	Manuscript Edits Required
	<input type="checkbox"/> Show this Search in Main Menus

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



# Submission Flags

### Save Search Criteria

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

Criteria	Search Criteria Name
Submission Flag Name is equal to 'Manuscript Will Require Significant Edits'	Manuscript Edits Required
	<input checked="" type="checkbox"/> Show this Search in Main Menus

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

# Submission Flags

**Save Search Criteria**

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

Criteria	Search Criteria Name
Submission Flag Name is equal to 'Manuscript Will Require Significant Edits'	Manuscript Edits Required
	<input checked="" type="checkbox"/> Show this Search in Main Menus

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

# Submission Flags

## Managing Editor Main Menu

Quick Searches:

[Copy/CoI Required](#)

[Manuscript Edits Required](#)

# Submission Flags

**Details for Manuscript Number: DEMOKH122-D-16-00009 "EMUG 2016 Additional Manuscript Details"**

Cancel Save Save and Close

[Abstract](#) [Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Reviewers Proposed by Editors](#) [Additional Information](#)

<b>Publish Ahead of Print</b>	Yes ▼	<input type="checkbox"/> Display 'Fast-Track to Publication' Flag
<b>Open Access Paper</b>	Yes ▼	<input type="checkbox"/> Display 'Open Access Paper' Flag

# Submission Flags

**Details for Manuscript Number: DEMOKH122-D-16-00009 "EMUG 2016 Additional Manuscript Details"**

[Abstract](#) [Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Reviewers Proposed by Editors](#) [Additional Information](#)


<b>Publish Ahead of Print</b>	Yes ▾	<input checked="" type="checkbox"/> Display 'Fast-Track to Publication' Flag
<b>Open Access Paper</b>	Yes ▾	<input type="checkbox"/> Display 'Open Access Paper' Flag



# Submission Flags

**Action**

[View Submission](#)  
[CrossCheck/iThenticate Results](#)  
(97%)

[Details](#)  

[History](#)  
[Classifications](#)  
[Unassign Editor](#)  
[File Inventory](#)  
[Edit Submission](#)  
[Invite Reviewers](#)  
[Solicit Commentary](#)  
[Notify Editor](#)  
[Set Final Disposition](#)  
[Initiate Production](#)  
[Similar Articles in MEDLINE](#)  
[OVID Title and Keywords Search](#)  
[BJ Author Search](#)  
[BJ Title Search](#)  
[Send E-mail](#)  
[Linked Submissions](#)

# Submission Flags History

Track those submission flags with ease

# Submission Flag History

**Action**




[View Submission](#)  
[CrossCheck/iThenticate Results](#)  
(97%)

[Details](#)     




**History**

[Classifications](#)  
[Unassign Editor](#)  
[File Inventory](#)  
[Edit Submission](#)  
[Invite Reviewers](#)  
[Solicit Commentary](#)  
[Notify Editor](#)  
[Set Final Disposition](#)  
[Initiate Production](#)  
[Similar Articles in MEDLINE](#)  
[OVID Title and Keywords Search](#)  
[BJ Author Search](#)  
[BJ Title Search](#)  
[Send E-mail](#)  
[Linked Submissions](#)

# Submission Flag History

SUBMISSION FLAG HISTORY							
Flag	Flag Name	Revision	Date Turned On	Operator	Date Turned Off	Operator	Days
	Manuscript Will Require Significant Edits	0	05 May 2016	Kate M Horgan, MD			(1)
	Copyright Transfer Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)
	Conflict of Interest Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)




# Submission Flag History

SUBMISSION FLAG HISTORY							
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	Manuscript Will Require Significant Edits	0	05 May 2016	Kate M Horgan, MD			(1)
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	Conflict of Interest Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)



# Submission Flag History

## SUBMISSION FLAG HISTORY

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# Submission Flag History

## SUBMISSION FLAG HISTORY

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	Copyright Transfer Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)
	Conflict of Interest Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)




# Submission Flag History

## SUBMISSION FLAG HISTORY

Flag	Flag Name	Revision	Date Turned On	Operator	Date Turned Off	Operator	Days
	Manuscript Will Require Significant Edits	0	05 May 2016	Kate M Horgan, MD	05 May 2016	Stacey Jellerson	1
*	Copyright Transfer Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)
*	Conflict of Interest Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)

# Submission Flag History

## SUBMISSION FLAG HISTORY

Flag	Flag Name	Revision	Date Turned On	Operator	Date Turned Off	Operator	Days
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# Submission Flag History

## SUBMISSION FLAG HISTORY

Flag	Flag Name	Revision	Date Turned On	Operator	Date Turned Off	Operator	Days
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# Submission Flag History

## SUBMISSION FLAG HISTORY

Flag	Flag Name	Revision	Date Turned On	Operator	Date Turned Off	Operator	Days
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	Copyright Transfer Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)
	Conflict of Interest Forms Required	0	05 May 2016	Kate M Horgan, MD			(1)

# Configurations



# Submission Flags

- The available Submission and People Flag icons are shared between the two configurations although both settings are housed separately in PolicyManager
- PolicyManager
  - Create Customized Submission Flags
- RoleManager
  - View Submission Flags
  - Turn on Submission Flags
  - Turn off Submission Flags


# Submission Flags

## [-] 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 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

# Submission Flags

## Create Customized Submission Flags

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

Add

Order	Flag	Flag Name	Flag Type	Associated With AMD	
1		Potential Duplicate Submission	Editorial and Production		<a href="#">Remove</a> <a href="#">Edit</a>
2		Fast-Track to Publication	Editorial and Production	Publish Ahead of Print	<a href="#">Remove</a> <a href="#">Edit</a>
3		Discussion in Progress	Editorial and Production		<a href="#">Remove</a> <a href="#">Edit</a>

# Submission Flags

## Add Customized Submission Flag

Cancel

Submit

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

Flag Icon:

Flag Name:  [Insert Special Character](#)  
*Maximum 256 characters*

Flag Type  
 Editorial  
 Production

Associate with AMD Field

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



# Submission Flags

## Add Customized Submission Flag

Cancel

Submit

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

Flag Icon:

[Insert Special Character](#)

Flag Name:

Rapid Communication

Maximum 256 characters

Flag Type

- Editorial
- Production

Associate with AMD Field

None

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



# Submission Flags

## Add Customized Submission Flag

Cancel

Submit

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

Flag Icon:

[Insert Special Character](#)

Flag Name:

Rapid Communication

Maximum 256 characters

Flag Type

Editorial

Production

Associate  
with AMD  
Field

None

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

# Submission Flags

## Add Customized Submission Flag

Cancel

Submit

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

Flag Icon:

[Insert Special Character](#)

Flag Name:

Rapid Communication

Maximum 256 characters

Flag Type

- Editorial
- Production

Associate with AMD Field

None

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

# Submission Flags

**Flag Icon:**

[Insert Special Character](#)

**Flag Name:**  Maximum 256 characters

**Flag Type**

- Editorial
- Production

**Associate with AMD Field**

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

! ! ! ! ! ! ! # # # # # # # # \$ \$ \$ \$ \$ \$ \$ \$ \$ \$

# Submission Flags

## RoleManager

---

Author Role

Reviewer Role

Editor Role

Publisher Role



# Submission Flags

## + Viewing and Editing People Data

### - Flag Icons

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

## + Proxy Activities



# Submission Flags

## + Viewing and Editing People Data

### - Flag Icons

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

## + Proxy Activities

# Submission Flags

- Helpful Links to configuration options:
  - [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)

# Reporting

# Submission Flags

- Submission Flag History View can be joined with many other views and tables to report on submissions with current flags or to track historical flag settings
- View recommendations
  - Authors & Submissions
  - Manuscript Status History View
  - Submissions & All Author Questionnaires View
- Most likely join would be the Unique Document ID

# Submission Flags

Data Sources | Fields | Summary | Chart | Gauge | Misc | Style | Filters | Preview

Report List | New | Save | Save As... | Print | SQL | Results 1000

Please choose a View or Table

Editors & Submissions View ▼

Submission Flag History View ▼ Unique Document ID ▼

Continue to Fields

Editors & Submissions View ▼ Unique Document ID ▼ Inner (Direct) ▼



# Submission Flags

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | Results 1000

Records

Field	Description	Sort	VG	A	Function	Format					
Manuscript Number	Manuscript Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>				
Editor First Name	Editor First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>				
Editor Last Name	Editor Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>				
Submission Flag Name	Submission Flag Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>				
Date Flag Set	Date Flag Set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	Short Date	<input type="checkbox"/>				
Date Flag Removed	Date Flag Removed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	Short Date	<input type="checkbox"/>				
---	---	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	---	<input type="checkbox"/>				

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

# Submission Flags

The screenshot shows a software interface with a menu bar at the top containing 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the menu bar is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and 'Results' (set to 1000). The main area is titled 'Filters' and contains a table with the following columns: 'Filter Field', 'Operator', 'Value(s)', and 'Blank Param'.

	Filter Field	Operator	Value(s)	Blank Param
1	Editor Last Name	Equals (Select)	Jellerson	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
2	...	...	...	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

Below the table, there is a checkbox labeled 'Show Filters In Report Description'. A 'Require' dropdown menu is set to 'Parameters in Viewer'. A 'Filter Logic' text box contains the text 'Ex:(1 OR 2) AND (3 OR 4)'. A 'Preview' button is located at the bottom left of the interface.

# Submission Flags



Manuscript Number	Editor First Name	Editor Last Name	Submission Flag Name	Date Flag Set	Date Flag Removed
DEMOKH122-D-16-00009	Stacey	Jellerson	Conflict of Interest Forms Required	5/5/2016	
DEMOKH122-D-16-00009	Stacey	Jellerson	Copyright Transfer Forms Required	5/5/2016	
DEMOKH122-D-16-00009	Stacey	Jellerson	Manuscript Will Require Significant Edits	5/5/2016	5/5/2016

# People Flags

# People Flags

- People Flags are icons that may be appended to user records at any time and can be visible in key areas of the interface
- Editors/Publisher roles may be given access to:
  - View People Flags
  - Turn on People Flags
  - Turn off People Flags
- People Flags are searchable throughout Editorial Manager
  - Search People
- People Flags may be turned on/off by searching via Search People or any name that has the flag icon associated with it



# People Flags

[Download Search Results](#)

Page: 1 of 1 (2 total People Matches) Display 50 results per page.

Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input type="checkbox"/>	Paul Horgan  	Jackson Hole	MO	UNITED STATES	[Author]	[Reviewer]		
<input type="checkbox"/>	Kate M Horgan, MD  	Danvers	MA	UNITED STATES	[Author]	[Reviewer]	[Managing Editor]	[Publisher]

Page: 1 of 1 (2 total People Matches) Display 50 results per page.

[Merge People Records](#) [Download Search Results](#)

# People Flags

## People Flags - Kate M Horgan







Check the box of the flag(s) you want to display for this person. Once a flag is enabled, the flag is displayed next to the person's name on many Editor and Publisher pages (if the user has RoleManager permission to 'View People Flags').

Uncheck the box of the flag(s) you do not want for this person. Once the box is unchecked and you click the 'Submit' button, the flag is no longer attached to this person.

Cancel

Submit

### SET PEOPLE FLAGS

Display	Flag	Flag Name
<input type="checkbox"/>		Late Reviewer
<input type="checkbox"/>		Do NOT Send Manuscript Back to This Author For Changes
<input type="checkbox"/>		Propose Reviewers
<input type="checkbox"/>		Works Remotely
<input type="checkbox"/>		Questionable Reviewer Status
<input type="checkbox"/>		Continuing Education Participant

# People Flags

## People Flags - Kate M Horgan







Check the box of the flag(s) you want to display for this person. Once a flag is enabled, the flag is displayed next to the person's name on many Editor and Publisher pages (if the user has RoleManager permission to 'View People Flags').

Uncheck the box of the flag(s) you do not want for this person. Once the box is unchecked and you click the 'Submit' button, the flag is no longer attached to this person.

Cancel

Submit

### SET PEOPLE FLAGS

Display	Flag	Flag Name
<input type="checkbox"/>		Late Reviewer
<input checked="" type="checkbox"/>		Do NOT Send Manuscript Back to This Author For Changes
<input type="checkbox"/>		Propose Reviewers
<input type="checkbox"/>		Works Remotely
<input type="checkbox"/>		Questionable Reviewer Status
<input checked="" type="checkbox"/>		Continuing Education Participant

# People Flags

Page: 1 of 1 (2 total People Matches) [Download Search Results](#) Display 50 results per page.

















Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input type="checkbox"/>	Paul Horgan  	Jackson Hole	MO	UNITED STATES	[Author]	[Reviewer]		
<input type="checkbox"/>	Kate M Horgan, MD    	Danvers	MA	UNITED STATES	[Author]	[Reviewer]	[Managing Editor]	[Publisher]

Page: 1 of 1 (2 total People Matches) [Download Search Results](#) Display 50 results per page.

[Merge People Records](#) [Download Search Results](#)







# People Flags

Action ▲	Manuscript Number ▲▼	Author Name ▲▼	Article Title ▲▼	Article Type ▲▼	Short Title ▲▼	Keywords	Classifications	Current Status ▲▼	Status Date ▲▼
<a href="#">View Submission</a> <a href="#">CrossCheck/iThenticate Results (97%)</a> <a href="#">Details</a>     <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">Notify Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">OVID - Title and Keywords</a> <a href="#">BJ Author Search</a> <a href="#">BJ Title Search</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOKH122- D-16-00009	Kate M Horgan            	EMUG 2016 Additional Manuscript Details	Rapid Communication			10: First Major Term	With Editor	04 May 2016



# People Flags

Action ▲	Manuscript Number ▲▼	Author Name ▲▼	Article Title ▲▼	Article Type ▲▼	Short Title ▲▼	Keywords	Classifications	Current Status ▲▼	Status Date ▲▼
<a href="#">View Submission</a> <a href="#">CrossCheck/iThenticate Results (97%)</a> <a href="#">Details</a>     <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">Notify Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">OVID - Title and Keywords</a> <a href="#">BJ Author Search</a> <a href="#">BJ Title Search</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOKH122-D-16-00009	Kate M Horgan	EMUG 2016 Additional Manuscript Details	Rapid Communication			10: First Major Term	With Editor	04 May 2016

Continuing Education Participant

# People Flags

## Search People

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Last Name ▼	Begins With ▼		ALL ▼   END ▼
Last Name	Begins With ▼		END ▼
First Name	Begins With ▼		
Institution	Begins With ▼		
City			
State			
Country			
E-mail Address			
Phone Number			
Personal Classifications			
Personal Keywords			
People Notes			
Detailed People Notes			
<b>People Flag Name</b>			
Registration Date			
Proxy Registration			

[Editor Main Menu](#)  
[Production Tasks Menu](#)  
[Production Status Grid](#)

# People Flags

**Search People**

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
People Flag Name ▼	Is Equal To ▼	Late Reviewer ▼	ALL
Last Name ▼	Begins With ▼	Late Reviewer	
Last Name ▼	Begins With ▼	Do NOT Send Manuscript Back to This Author For Changes	
		Propose Reviewers	
		Works Remotely	
		Questionable Reviewer Status	
		Continuing Education Participant	

# People Flags

**Search for Reviewer All Reviewers - Manuscript Number DEMOKH122-D-16-00009**  
**Kate M Horgan**  
**EMUG 2016 Additional Manuscript Details**

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

**Change Search Type**

Search My Publication    Search for Reviewers    from    All Reviewers   

**Search for Reviewers**

[Help with Searching](#)    [Insert Special Character](#)

(	Criterion	Is/Is not	Selector	Value	)	
▼	Last Name	is	Begins With		▼	OR ▼ <input type="button" value="Remove"/>
▼	Last Name				▼	OR ▼ <input type="button" value="Remove"/>
▼	First Name	is	Begins With		▼	OR ▼ <input type="button" value="Remove"/>
▼	E-mail Address				▼	OR ▼ <input type="button" value="Remove"/>
▼	Position	is	Begins With		▼	OR ▼ <input type="button" value="Remove"/>
▼	Department				▼	OR ▼ <input type="button" value="Remove"/>
▼	Institution	is	Begins With		▼	OR ▼ <input type="button" value="Remove"/>
▼	City				▼	OR ▼ <input type="button" value="Remove"/>
▼	State	is	Begins With		▼	OR ▼ <input type="button" value="Remove"/>
▼	Country				▼	OR ▼ <input type="button" value="Remove"/>
▼	People Notes	is	Begins With		▼	<input type="button" value="Remove"/>
	<b>People Flag Name</b>					<input type="button" value="Add"/>
	Personal Classifications					
	Personal Keywords					
	Secondary Last Name					
	Secondary First Name					

# Configurations



# People Flags

- People flag configurations are similar to submission flags
- Same pool of potential icons
- PolicyManager
  - Create Customized People Flags
- RoleManager
  - Editor/Publisher Roles
    - View People Flags
    - Turn on People Flags
    - Turn off People Flags


# People Flags

## ☐ 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 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](#)

# People Flags

## Create Customized People Flags

People Flags can be attached to people records on the People Flags page (accessible from the 'People Information' and 'Search People – Update Information' page), or by clicking on the flag icon on any page where a People Flag is displayed. Users with permission to 'Turn On People Flags' can also set flags by clicking the 'Set Flag' icon . When a flag is displayed for a person, it is visible to Editors and Publishers with appropriate RoleManager permission.

[Add](#)

**Order**

1

**Flag Flag Name**



Late Reviewer

[Remove](#) [Edit](#)

2



Do NOT Send Manuscript Back to This Author For Changes

[Remove](#) [Edit](#)

# People Flags

## Add Customized People Flag

Cancel

Submit

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On People Flags' and 'Turn Off People Flags' can display/turn off People Flags for any person on the People Flags page. When a flag is attached to a people record, it will be displayed next to the person's name on many pages throughout the system (Editor and Publisher Roles must have permission to 'View People Flags').

Flag Icon:

#

Flag Name:

Award Recipient

[Insert Special Character](#)

*Maximum 256 characters*



# People Flags

## Add Customized People Flag

Cancel

Submit

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On People Flags' and 'Turn Off People Flags' can display/turn off People Flags for any person on the People Flags page. When a flag is attached to a people record, it will be displayed next to the person's name on many pages throughout the system (Editor and Publisher Roles must have permission to 'View People Flags').

Flag Icon:



[Insert Special Character](#)

Flag Name:

Award Recipient

*Maximum 256 characters*





# People Flags

## RoleManager

---

Author Role

Reviewer Role

Editor Role

Publisher Role

# People Flags

## + Viewing and Editing People Data

### - Flag Icons

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

## + Proxy Activities

# People Flags

- Helpful Links to configuration options:
  - [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)

# Reporting

# People Flags

- People flags requiring the joining of two tables to report on flags associated with people records:
  - People Flag Associations
  - Configured Custom Flags
- These tables are joined based on Custom Flag Config ID field
- Additional views can be joined from here
  - People & Address View
  - Authors & Submissions View
  - Reviewers & Submissions View



# People Flags

Data Sources | Fields | Summary | Chart | Gauge | Misc | Style | Filters | Preview

Report List | New | Save | Save As... | Print | SQL | Results 1000

Please choose a View or Table

People & Address View

People Flag Associations | People Unique ID

Configured Custom Flags | Custom Flag Config ID

Continue to Fields

People & Address View | People Unique ID | Left (First Exis) [X] [Magnifying Glass]

People Flag Associations | Custom Flag Config ID | Left (First Exis) [X] [Magnifying Glass]

# People Flags

The screenshot shows a report configuration window with a blue header bar containing tabs: Data Sources, Fields, Summary, Chart, Gauge, Misc, Style, Filters, and Preview. Below the tabs is a toolbar with icons for Report List, New, Save, Save As..., Print, and a Results dropdown set to 1000. The main area is titled 'Records' and contains a table with the following columns: Field, Description, Sort, VG, A, Function, and Format. The table lists four fields: First Name, Last Name, E-mail Address, and Custom Flag Description. Each row has checkboxes for Sort, VG, and A, a Function dropdown, and a Format dropdown. To the right of each row are icons for deleting, adding, and settings. Below the table is an 'Add Subtotals' checkbox and a row of buttons: Quick Add, Add Pivot, Continue to Summary, and Preview.

Field	Description	Sort	VG	A	Function	Format
First Name	First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Last Name	Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
E-mail Address	E-mail Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
Custom Flag Description	People Flag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

# People Flags

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | Results 1000

Filter Field	Operator	Value(s)	Blank Param
1 Custom Flag Description	Equals (Multiple)	... (blank) Continuing Education Participant Do NOT Send Manuscript Back Late Reviewer	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2 ...	...		<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Show Filters In Report Description

Require ... Parameters in Viewer

Filter Logic Ex:(1 OR 2) AND (3 OR 4)

Preview

# People Flags

The screenshot shows a software interface with a menu bar and a toolbar. The menu bar includes options like Data Sources, Fields, Summary, Chart, Gauge, Misc, Style, Filters, and Preview. The toolbar contains icons for Report List, New, Save, Save As..., Print, and a Results dropdown menu set to 1000. Below the toolbar is a table with the following data:

First Name	Last Name	E-mail Address	People Flag
Kate	Horgan	khorgan@ariessc.com	Continuing Education Participant

# Custom Questions

Submission Questionnaires



# Custom Questions

- Custom questions can be configured at the Article Type level:
  - Submission questionnaire – corresponding author only
  - Author questionnaire – corresponding author AND all co-authors
- Questions can be configured as:
  - Text (200 character limit)
  - Integer
  - Date
  - Decimal
  - Notes (20,000 character limit)
  - List (Drop-down, Radio Button, Scrolling Selector, Checkboxes)
    - Follow-on questions may be added to any List value question

# Custom Questions

[Insert Special Character](#)

## New Submission

- ✓ Select Article Type
- ✓ Enter Title
- Add/Edit/Remove Authors
- Funding Information
- Select Section/Category
- Submit Abstract
- Enter Keywords
- Select Classifications
- ➔ **Additional Information**
- Enter Comments
- Attach Files

Please Enter the Following

**Additional Information is Required for Submission.**  
Please respond to the questions/statements below.

Did all co-authors contribute significantly to the submitted work?

**Answer  
Required:**

Please select a response  
 Yes  
 No

**Please select a  
response.**

Was this paper reviewed by a statistician prior to submitting to the journal?

Please select a response ▼

Is this work currently under consideration for publication at another journal?

Please select a response  
 Yes  
 No

# Custom Questions

## New Submission

- ✓ Select Article Type
- ✓ Enter Title
- Add/Edit/Remove Authors
- Funding Information
- Select Section/Category
- Submit Abstract
- Enter Keywords
- Select Classifications
- ➔ Additional Information
- Enter Comments
- Attach Files

Please Enter the Following

---

Additional Information is Required for Submission.  
Please respond to the questions/statements below.

---

Did all co-authors contribute significantly to the submitted work?

Answer Required:

Please select a response  
 Yes  
 No

Was this paper reviewed by a statistician prior to submitting to the journal?

Yes

Is this work currently under consideration for publication at another journal?

Please select a response  
 Yes  
 No

# Custom Questions

[Top](#)

**Additional Information**

**[-] Questionnaire Responses**

*Did all co-authors contribute significantly to the submitted work?*  
Yes

*Was this paper reviewed by a statistician prior to submitting to the journal?*  
Yes

*Is this work currently under consideration for publication at another journal?*  
No

*Please enter **all** conflicts of interest in the space provided. This information may be made available to reviewers at the discretion of the editors.*  
(No Response)

# Custom Questions

<b>Corresponding Author:</b>	Kate Horgan, Harvard University  Danvers, MA UNITED STATES   [Proxy]
<b>Corresponding Author E-Mail:</b>	<a href="mailto:trash1@ariessc.com">trash1@ariessc.com</a>
<b>Author Comments:</b>	
<b>Other Authors:</b>	Michael Di Natale  Dashanna Terry 
	<a href="#">Author Status</a>



# Custom Questions

## Corresponding Author Status

Order	Author Name	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	<a href="#">Horgan Kate</a>	khorgan@ariessc.com	<a href="#">0000-0002-1804-3311</a> 	MD	Boston University	<a href="#">View Author Details</a> <a href="#">View Questionnaire Responses</a>

## Other Author Status

Order	Author Name	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
 	 				 	 	
2	Michael Di Natale	<a href="mailto:mdinatale@ariessys.com">mdinatale@ariessys.com</a> <a href="#">Edit</a>	<a href="#">0000-0002-0136-5875</a> 			No Response	<a href="#">Resend Letter</a> <a href="#">View Author Details</a> Questionnaire Not Completed
3	Dashanna Terry	<a href="mailto:dterry@ariessys.com">dterry@ariessys.com</a> <a href="#">Edit</a>				No Response	<a href="#">Resend Letter</a> <a href="#">View Author Details</a> Questionnaire Not Completed

# Configurations

# Custom Questions

- Custom questions must be tied to Questionnaires in order to link them to Article Types
- Questionnaires can be configured to display at New Submission or First Revision
- Different questions can be asked at each point
- Co-authors are only prompted to answer questions once as part of the Verify, Verify and Register at New Submission or First Revision
- Submission Questionnaires – only for corresponding author
- Author Questionnaires – corresponding and all co-authors

# Custom Questions

## 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](#)

# 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>	Please enter <b>all</b> conflicts of interest in the space provided. <i>This information may be made available to reviewers at the discretion of the editors.</i>
<a href="#">Edit</a>	§ Did you or your institution at any time receive payment or services from a third party for any aspect of the submitted work (including, but not limited to grants, data monitoring board, study design, manuscript preparation, statistic analysis, etc...)?
<a href="#">Edit</a>	Is this work currently under consideration for publication at another journal?
<a href="#">Edit</a>	Did all co-authors contribute significantly to the submitted work?
<a href="#">Edit</a>	Was this paper reviewed by a statistician prior to submitting to the journal?



# Custom Questions

## Add Custom Question

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

Cancel

Save and Close

Save and Add Another Question

[Open Special Character Palette](#)

**Question text:**

Please provide a one sentence summary of your paper in the space provided.

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

# Custom Questions

## Add Custom Question

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

Cancel

Save and Close

Save and Add Another Question

[Open Special Character Palette](#)

**Question text:**

Please provide a one sentence summary of your paper in the space provided.

**Instructions for Author Response:**

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

**Response Type:**

Text ▼

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

# Custom Questions

## Add Custom Question

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

Cancel

Save and Close

Save and Add Another Question

[Open Special Character Palette](#)

**Question text:**

Please provide a one sentence summary of your paper in the space provided.

Instructions for Author Response:

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

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

# Custom Questions

## Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote  
*(applicable to specific transmittal methods)*

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:



# Custom Questions

## Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote  
*(applicable to specific transmittal methods)*

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:



# Custom Questions

## Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
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*(applicable to specific transmittal methods)*

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### PDF Cover Page [?](#)

- Display

### Manuscript Details

- Display

Help Text:

### Transmittal Form [?](#)

- Display
- Editable
- Required

Help Text:

# Custom Questions

## Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
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*(applicable to specific transmittal methods)*

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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:

# Custom Questions

## Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote  
*(applicable to specific transmittal methods)*

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:

# Custom Questions

## 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](#)

# Custom Questions

**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](#)
  - [Set Revision File Selection Option](#)
  - [Configure Duplicate Submission Check](#)
  - [Configure Technical Check](#)
  - [Configure Similarity Check](#)
  - [Configure Office 2007 and Higher Support](#)
  - [Configure Author Accept Checkbox](#)



# Custom Questions

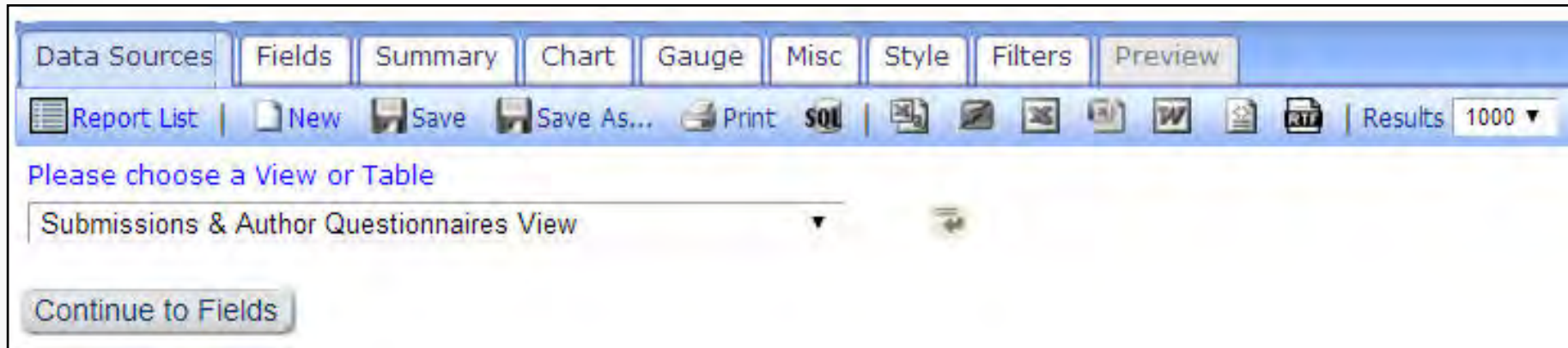
- Helpful links to configuration options:
  - [http://www.editorialmanager.com/robohelp/13.0/Editorial\\_Manager\\_Help/Custom\\_Questionnaires.htm](http://www.editorialmanager.com/robohelp/13.0/Editorial_Manager_Help/Custom_Questionnaires.htm)

# Reporting

# Custom Questions

- Custom questions have their own unique views that cover many common reports
- Recommended views:
  - Submissions & All Authors Questionnaires View
  - Submissions & Author Questionnaires View
- Question text and author response fields automatically available in these views
- Can also determine whether a question was asked at initial submission or revision

# Custom Questions



# Custom Questions

Records

Field	Description	Sort	VG	A	Function	Format				
Manuscript Number	Manuscript Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corresponding Author's First Name	Corresponding Auth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corresponding Author's Last Name	Corresponding Auth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Question Text	Question Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Author Response	Author Response	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asked on Original	Asked on Original	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	0,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview



# Custom Questions

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print SQL | Results 1000

	Filter Field	Operator	Value(s)	Blank Param
1	Initial Date Submitted	In Time Period	Current Month	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
2	Manuscript Number	Isn't Blank		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
3	...	...		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

Show Filters In Report Description

Require ... Parameters in Viewer

Filter Logic Ex:(1 OR 2) AND (3 OR 4)

Preview

# Custom Questions

Manuscript Number	Corresponding Author's First Name	Corresponding Author's Last Name	Question Text	Author Response	Asked on Original
DEMOKH122-D-16-00009	Kate	Horgan	Did all co-authors contribute significantly to the submitted work?	Yes -	1
DEMOKH122-D-16-00009	Kate	Horgan	Did you or your institution at any time receive payment or services from a third party for any aspect of the submitted work (including, but not limited to grants, data monitoring board, study design, manuscript preparation, statistic analysis, etc...)?	-	1
DEMOKH122-D-16-00009	Kate	Horgan	Is this work currently under consideration for publication at another journal?	-	1
DEMOKH122-D-16-00009	Kate	Horgan	Please enter <b>all</b> conflicts of interest in the space provided. <i> This information may be made available to reviewers at the discretion of the editors.</i>	-	1
DEMOKH122-D-16-00009	Kate	Horgan	Was this paper reviewed by a statistician prior to submitting to the journal?	No -	1

Questions?