

# Welcome to EEMUG 2018

em

cm

pm

# EM Boot Camp

Editorial Manager basics, tips, and tricks

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# Bootcamp Agenda

- Introductions
- Sampling of EM Features/Functionality
  - Communicating with your users
  - Reporting
  - Features of Letters
  - Widgets
  - Editorial Office
- 15 minute Tea break (Coffee also available)
- Workflow examples
- Questions



# Introductions





# Sampling of EM Features and Functionality



# Communicating With Your Users



# Communicating with your users!



## Providing Information

- Publication Main Page
- Author Main Menu
- Custom Instructions
  - Registration Instructions
  - Submission Instructions
  - Login Box
  - “I accept” Checkbox

## Collecting Information


- Questionnaires
  - Author Questionnaires
  - Contributing Author Questionnaires
  - Reviewer Forms
  - Editor Forms




## Providing Information

- Publication Main Page
- Author Main Menu
- Custom Instructions
  - Registration Instructions
  - Submission Instructions
  - Login Box
  - “I accept” Checkbox

# Publication Main Page

 **em Editorial Manager™**

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

 **em Editorial Manager™**

Not logged in.

**Important Message: Site under development. Do not use for live manuscript submission.**

Welcome to Editorial Manager® for  
**THE JOURNAL TITLE**

**Cover  
Image  
Here**

**Please Enter the Following** [Insert Special Character](#)

Username:   
Password:

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

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

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<a href="#">Instructions for Authors</a>	<a href="#">Instructions for Reviewers</a>	<a href="#">About the Journal</a>	<a href="#">Contact Editorial Office</a>
--	--	-----------------------------------	--

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

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

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

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

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

# Publication Main Page



Training and Demo Site



Not logged in.

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



## Training and Demonstration



### Contact

United States

**Aries Systems Corporation**  
200 Sutton Street  
North Andover, MA 01845  
USA  
[Driving directions to Aries \(PDF\)](#)

Telephone: (978) 975-7570  
Fax: (978) 975-3811  
E-mail: [marketing@edmgr.com](mailto:marketing@edmgr.com)

### Adobe

The system creates files in Portable Document Format (PDF), which can be viewed using **Adobe Acrobat Reader** and is provided free from Adobe's website.

- Login
- Register

### TESTIMONIALS

"I find Editorial Manager incredibly useful; organized, intuitive, and fast. It helps me to answer author questions quickly, keep my LTE manuscripts organized, and export data for the editors efficiently. Excellent!"  
Jessica Brabant  
Editorial Assistant  
Journal of Vascular Surgery

[Browse All >>](#)

- Author Instructions
- Reviewer Instructions
- FAQ's

More than **3,700+** publications from **150** scholarly societies, university presses and commercial publishers use workflow solutions from Aries Systems Corporation. Such a large and diversified base of customers ensures successful ongoing product feedback and development.

Aries Systems Corporation, developer of Editorial Manager and Preprint Manager, has **20 years of experience** developing successful publishing technology.

Aries has a track record of delivering **exceptional customer service** validated through user surveys, testimonials and 99.99% system availability.

### Mission:

Aries Systems transforms the way scholarly publishers bring high-value content to the world. The company's innovative and forward-looking workflow solutions manage the complexities of modern print and electronic publishing—from submission to editorial management and peer review, to production tracking and publishing channel distribution. As the publishing environment evolves, Aries Systems is committed to delivering solutions that help publishers and scholars enhance the discovery and dissemination of human knowledge. Publish faster, publish smarter, with Aries Systems.

# Publication Main Page

**em Editorial Manager™**

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

Go to: -- Search Page --  
Role: Managing Editor Username: melanie

English

**Important Message: Site under development. Do not use for live manuscript submission.**

Editorial Proposal Menu Production Tasks

### Managing Editor Main Menu

**Submissions With:**

0 Reviews Complete	1 Reviews Complete	2 Reviews Complete	3 Reviews Complete	4 Reviews Complete
0	0	0	0	0

**Search**

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

**Editor 'To-Do' List**

- My Pending Assignments (6)
  - [New Submissions](#) (4)
  - Revised Submissions (0)
  - New Submissions Requiring Assignment (0)
  - Revised Submissions Requiring Assignment (0)
  - Incomplete Submissions (1)
  - New Invitations (1)
  - New Assignments (0)
  - Submissions with Required Reviews Complete (0)
  - Submissions Requiring Additional Reviewers (0)
  - Submissions with One or More Late Reviews (0)
- Reviews in Progress (0)
  - Reviewers Invited - No Response (0)
  - Submissions Under Review (0)

**View All Assigned**

[View All Assigned Submissions](#) (12)  
[View All Assigned Submissions being Edited](#) (6)

Editorial Menú de propuestas Tareas de producción

### Menú principal Managing Editor

**Manuscritos con:**

0 evaluaciones completadas	1 evaluaciones completadas	2 evaluaciones completadas	3 evaluaciones completadas	4 evaluaciones completadas
1	0	0	0	0

**Buscar**

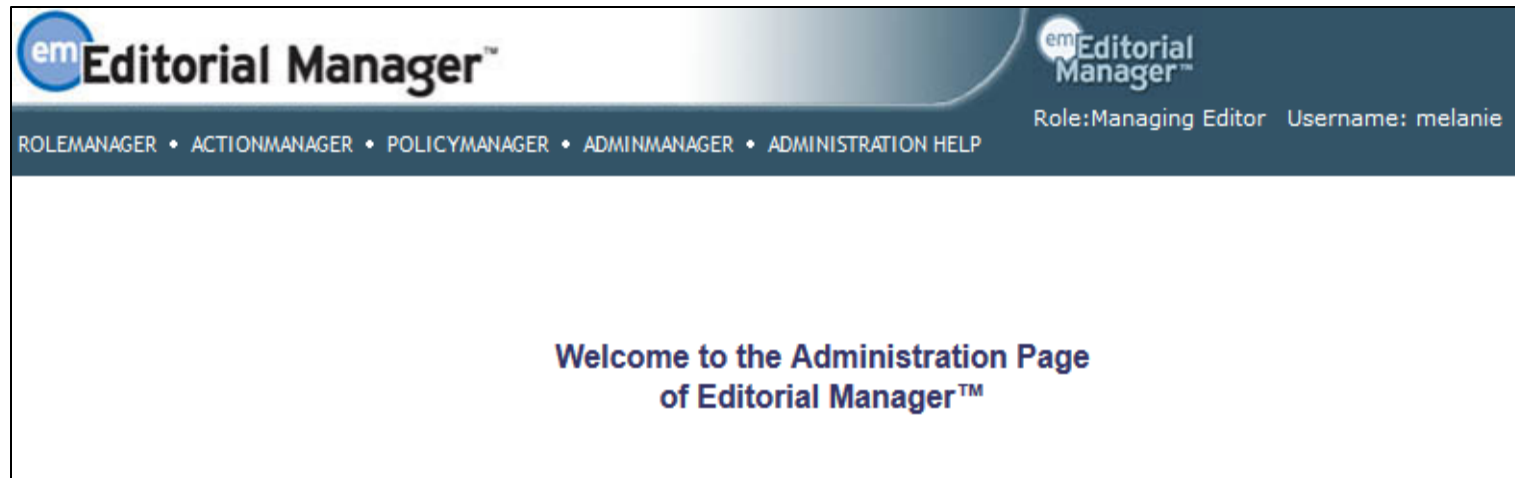
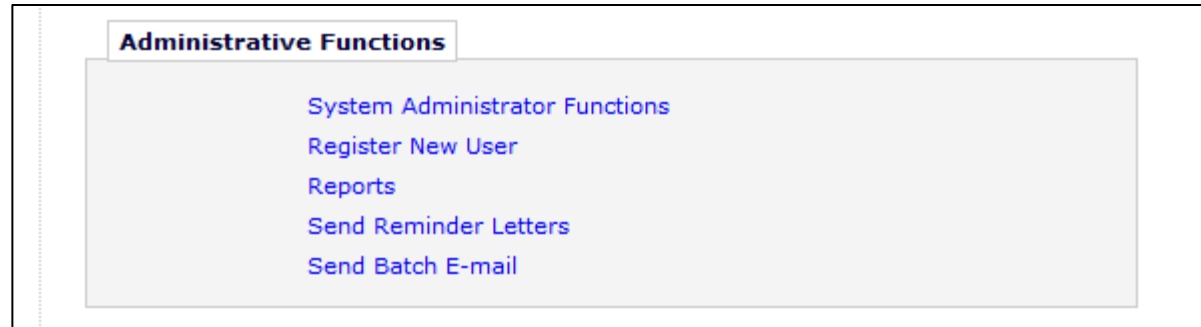
[Buscar manuscritos](#) | [Buscar personas](#)

**Lista de 'quehaceres' del editor**

Mis trabajos pendientes (6)

- [Nuevos manuscritos](#) (4)
- Manuscritos revisados (0)
- Nuevos Envíos que Requieren Asignación (0)
- Manuscritos revisados que requieren asignación (0)
- [Manuscritos incompletos](#) (1)
- Nuevas invitaciones (0)
- [Nuevos trabajos](#) (1)

# System Administrator Functions



- Permission Controlled!
- Role Manager – Assign Permissions to roles
- Action Manager – Link letters and events
- Policy Manager – Nuts and bolts!
- Admin Manager – Sharing People Letters, Transfers, Ingest



# Author Main Menu

## Author Main Menu

### Instructions:

- Provide links to outside sources
- Use HTML to format text
- Provide links to download forms
- Special instructions

The screenshot shows the Editorial Manager Author Main Menu interface. At the top, there is a navigation bar with the Editorial Manager logo and a list of links: HOME, LOG OUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. On the right side of the navigation bar, there is a dropdown menu for the user's role (set to 'Author') and the username 'mary140'. Below the navigation bar, a red banner displays an important message: 'Important Message: Site under development. Do not use for live manuscript submission.' The main content area is divided into several sections, each with a title and a list of items:

- Author Main Menu** (highlighted with a red border):
  - For additional help with your submission, please click [here](#) for the Author Tutorial.
  - The #1 reason that submissions are returned to author is missing information in the title page. Don't let this happen to you! Please be sure to include:
    - \* Corresponding author contact information
    - \* Contributing author information
- Production**:
  - Submissions in Production (14)
  - Current Task Assignments (2)
- New Submissions**:
  - Submit New Manuscript
  - Submissions Sent Back to Author (1)
  - Incomplete Submissions (7)
  - Submissions Waiting for Author's Approval (10)
  - Submissions Being Processed (4)
- Revisions**:
  - Submissions Needing Revision (8)
  - Revisions Sent Back to Author (0)
  - Incomplete Submissions Being Revised (2)
  - Revisions Waiting for Author's Approval (0)
  - Revisions Being Processed (1)
  - Declined Revisions (0)
- Completed**:
  - Submissions with a Decision (17)
  - Completed Production Task Assignments (2)
  - Submissions with Production Completed (2)

# Author Main Menu

## Customize Author Main Menu Instructions

Enter the custom instructions you would like Authors to see on the Author Main Menu page. Please check the text carefully, as the instructions will be immediately visible to all Authors as soon as you click the 'Submit' button.

Cancel Submit

Page	Instructions
Author Main Menu	<p><a href="#">Insert Special Character</a></p> <pre>For additional help with your submission, please click &lt;a href="http://www.editorialmanager.com /homepage/docs/author_tutorial.doc"&gt;here&lt;/a&gt; for the Author Tutorial. &lt;br&gt;&lt;br&gt; &lt;font color=red&gt; The #1 reason that submissions are returned to author is missing information in the title page. Don't let this happen to you! Please be sure to include:&lt;br&gt;</pre>

Cancel Submit

- Author Main Menu Instructions configured in Policy Manager - General Policies
- You can use HTML tags to format text or insert links


# Custom Registration Instructions

## Pre-registration Page

To register to use the Editorial Manager system, please enter the requested information. Upon successful registration, you will be sent an e-mail with instructions to verify your registration.

Choose a Registration Method Insert Special Character

Retrieve your details from the ORCID registry:

 Use My ORCID Record

Or type in your details and continue to register without using ORCID:

Given/First Name\*

Family/Last Name\*

E-mail Address\*  Continue >>

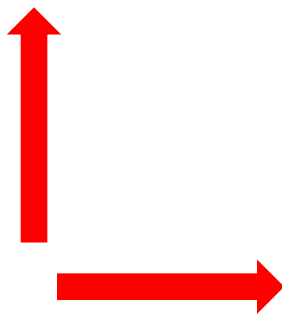
---

WARNING - If you think you already have an existing registration of any type (Author, Reviewer, or Editor) in this system, please DO NOT register again. This will cause delays or prevent the processing of any review or manuscript you submit. If you are unsure if you are already registered, click the 'Forgot Your Login Details?' button.

If you are registering again because you want to change your current information, changes must be made to your existing information by clicking the 'Update My Information' link on the menu bar. If you are unsure how to perform these functions, please contact the editorial office.

---

Cancel Forgot Your Login Details?



Guide  
registrants  
through the  
registration  
process using  
Custom  
Registration  
Instructions

# Custom Registration Instructions - Configuration

**Edit Registration Instructions**

Edit the text you would like to appear on the Registration page and in the 'Select Personal Classifications' popup window. Click "View Default Instructions" to see default instructions. Click "Revert to Default Instructions" to revert the registration instructions to the default. HTML tags and special characters may be used.

If you have not edited the instructions, the default instructions are in the text areas below and will appear on the page.

	Line Wrap: <input type="text" value="soft"/> <a href="#">Insert Special Character</a>
<b>Registration Information</b>	<b>Instructions</b>
<b>Header Pre-Registration Instructions (Top of Pre-Registration Page)</b>	To register to use the Editorial Manager system, please enter the requested information. Upon successful registration, you will be sent an e-mail with instructions to verify your registration.
<a href="#">View Default Instructions</a>	<a href="#">Revert to Default Instructions</a>
<b>Footer Pre-Registration Instructions (Bottom of Pre-Registration Page)</b>	<code>WARNING - If you think you already have an existing registration of any type (Author, Reviewer, or Editor) in this system, please DO NOT register again. This will cause delays or prevent the processing of any review or manuscript you submit. If you are unsure if you are already registered, click the 'Forgot Your Login Details?' button.&lt;br /&gt;&lt;br /&gt;If you are registering again because you want to change your current information, changes must be made to your existing</code>

Configure Custom Registration Instructions:  
Policy Manager - Registration and Login Policies -  
Edit Registration Instructions

# Custom Submission Instructions

**Please Add, Edit, or Remove Authors**

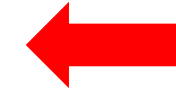
Enter the names of anyone who contributed to your manuscript by clicking 'Add Author'. The order of the authors may be changed by updating the number in the 'Order' column then clicking 'Update Author Order'. The first author of the manuscript may be indicated.

**Current Author List** + Add Another Author

...	mary mary [Corresponding Author] [First Author] [You]
-----	---

+ Add Another Author

Previous Next



Guide Authors through the submission process using Custom Submission Instructions

**Funding Information**

Please enter the funder name, grant number and the grant recipient. Authors listed in the dropdown menu were added during the Add/Edit/Remove Authors submission step. Click the '+' icon to add another funder. When you are finished, click the 'Next' button.

**Current Funding Sources List** + Add a Funding Source

*There are currently no Funding Sources in the list*

+ Add a Funding Source

Previous Next



Custom instructions are available for every submission step

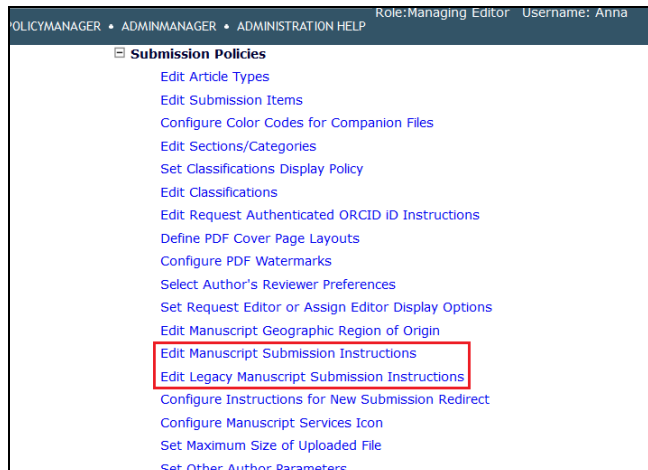
# Custom Submission Instructions - Configuration

	Insert Special Character	
Manuscript Submission Step	New Submission Instructions	Revised Submission Instructions
Select Article Type	Choose the article type of your manuscript from the pull-down menu.	Change the article type of your manuscript from the pull-down menu if necessary.
Enter Article Title	Enter the title of your manuscript. You cannot submit a manuscript without a title.	Revise the title of your manuscript if necessary. You cannot submit a manuscript without a title.

- Configure custom submission instructions:  
Policy Manager -  
Submission Policies -  
Edit Manuscript  
Submission  
Instructions
- Different instructions available for initial submission and revision

# New Interface!

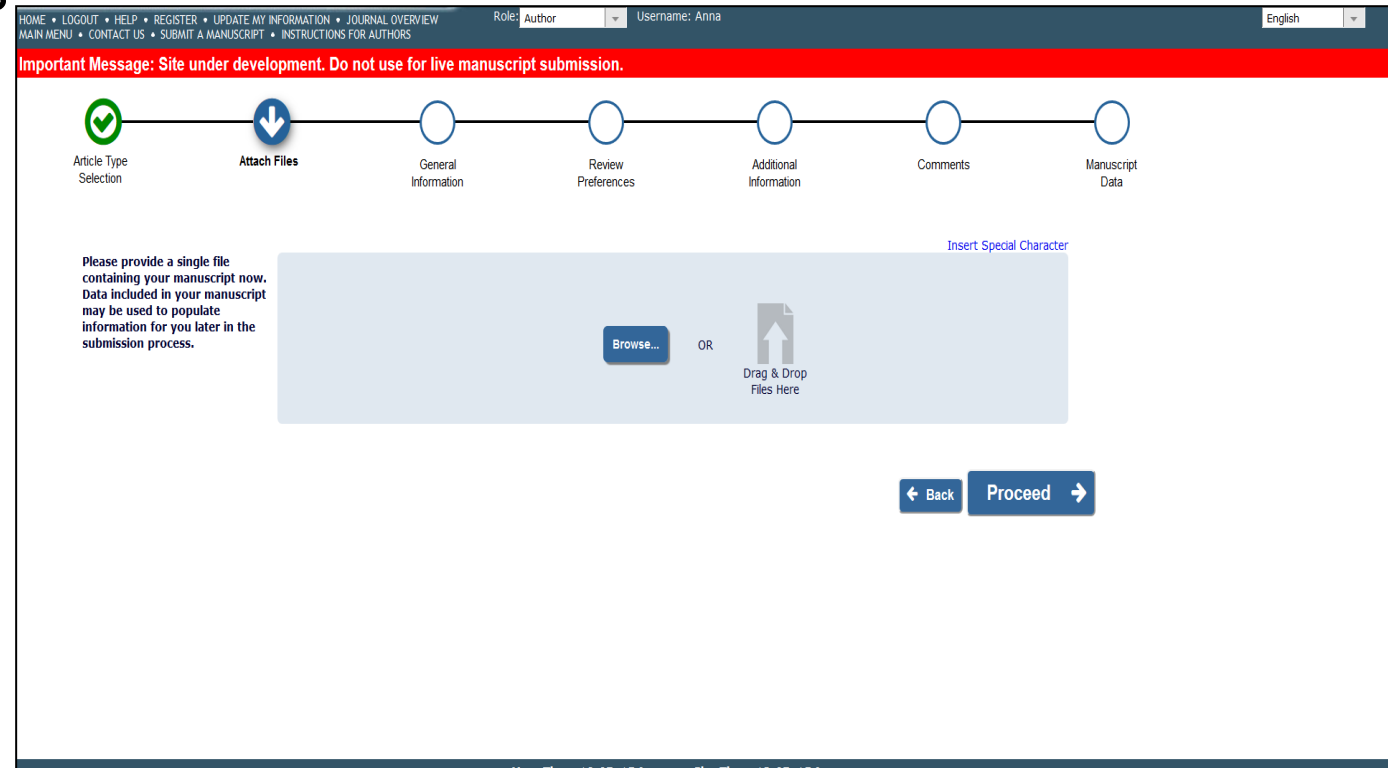
- New Look for Authors
- Version 14.1-15.0
- Legacy Instructions



Role: Managing Editor Username: Anna

POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

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



HOME • LOGOUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW Role: Author Username: Anna English

MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

**Important Message: Site under development. Do not use for live manuscript submission.**

Article Type Selection **Attach Files** General Information Review Preferences Additional Information Comments Manuscript Data

[Insert Special Character](#)

Please provide a single file containing your manuscript now. Data included in your manuscript may be used to populate information for you later in the submission process.

OR

# Login Box

Welcome to Editorial Manager® for  
**THE JOURNAL TITLE**


Cover  
Image  
Here

Please Enter the Following [Insert Special Character](#)

Username:

Password:

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

Or Login via:  [What is ORCID?](#)

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

FOOTER

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[Instructions for Authors](#) [Instructions for Reviewers](#) [About the Journal](#) [Contact Editorial Office](#)

- The login box can be placed directly on the publication main page
- Define login box colour
- Insert footer
  - This can include links to outside sources or to download files. HTML can also be used to format text



# Login Box



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

**Login**


header

Please Enter the Following [Insert Special Character](#)

Username:

Password:

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

Or Login via:  [What is ORCID?](#)

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

FOOTER

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- The login box can be accessed from the main navigation bar if it's not placed directly on the main page
- In addition to the footer this page can also contain:
  - Header - an additional location for text
  - A thumbnail image can be used for a logo or other image


# Configure Login Page

- System Administrator Functions – Policy Manager – Registration and Login Policies – Configure Login Page
- Can instantly show on Mainpage for communication purposes

### Configure Login Page

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


Please select any alternative, third party Login options you also wish to enable.

 Login via ORCID

If you want to customize various components of the publication's Login page, you can change the settings and modify the HTML in the text boxes below. We strongly suggest that you test the changes in a separate HTML editing tool (e.g. Dreamweaver), and preview the HTML and/or theme color in different browsers to ensure the page displays properly on all platforms. In other words, if you want to experiment with different theme colors, you should do so outside the system, and do not save a new theme color in Editorial Manager until you are satisfied with the appearance.

You can upload files to be referenced in the Login Header and Footer Text, by clicking the 'Manage Files for Login Page' link. Once you have uploaded the files (e.g. tutorials, PDFs, etc.), you can insert the file reference by clicking the 'Insert File Reference' link. Internet Explorer users should place the cursor at the appropriate spot in the box, then click the link.

You should also be sure to save a backup copy of your entry outside of Editorial Manager to ensure that no work is lost if there is a browser error when submitting the page. Once you submit this page, any changes are automatically visible to all users.

<b>Theme Color</b> <i>[Enter HEX color code or choose with the color picker]</i>	#9999FF 
<b>Login Header Text</b>	<a href="#">Insert File Reference</a> <a href="#">Insert Special Character</a> <a href="#">Manage Files for Login Page</a> login!
<b>Thumbnail Image</b>	<a href="#">Manage Thumbnail Images</a>
<b>Login Footer Text</b>	<a href="#">Insert File Reference</a> <a href="#">Insert Special Character</a> <a href="#">Manage Files for Login Page</a> can add footer

# Author “I Accept” Checkbox

Action ▲	Title ▲▼	Date Submission Began ▲▼	Status Date ▲▼	Current Status ▲▼	Please read the <b>Plagiarism Agreement</b> and indicate your acceptance by checking the box below.
<a href="#">View Submission</a> <a href="#">Edit Submission</a> <a href="#">Approve Submission</a> <a href="#">Remove Submission</a> <a href="#">Correspondence</a> <a href="#">Send E-mail</a>	Boot Camp	May 16, 2017	May 16, 2017	Needs Approval	<input type="checkbox"/> I accept

- “I Accept” checkbox can be used to have Authors indicate that they have read and agreed to certain policies or guidelines
- Warning text can also be configured if the Author does not check the box
- The “I Accept” checkbox is for initial submission only

Action ▲	Title ▲▼	Date Submission Began ▲▼	Status Date ▲▼	Current Status ▲▼	Please read the <b>Plagiarism Agreement</b> and indicate your acceptance by checking the box below.
<a href="#">View Submission</a> <a href="#">Edit Submission</a> <a href="#">Approve Submission</a> <a href="#">Remove Submission</a> <a href="#">Correspondence</a>	Boot Camp	May 16, 2017	May 16, 2017	Needs Approval	<input type="checkbox"/> I accept

Page: 1 of 1 (1 total submissions) Display 10 results per page.

You forgot to click the box!

# Author “I Accept” Checkbox

Area	Instructions
<b>Instruction to display on the Author's Submissions Waiting for Author's Approval Page</b>	<p><a href="#">Insert Special Character</a></p> <p>If no Actions appear for your submission, please wait a few minutes for your PDF to be built. The Actions appear automatically when your PDF is available.</p> <p>The 'Edit Submission' link allows you to fix or alter your submission. Please use</p> <p><a href="#">View Default Instructions</a>      <a href="#">Revert to Default Instructions</a></p>
<b>Column Header</b>	<p><a href="#">Insert Special Character</a></p> <p>Please read the <a href="http://www.ariessys.com/views-press/faqs/category/technical-requirements/#faq10" target="new">Plagiarism Agreement</a> and indicate your acceptance by checking the box below.</p>
<b>Alert Text displayed if Author does not tick/select box before clicking Approve Submission</b>	<p><a href="#">Insert Special Character</a></p> <p>You forgot to click the box!</p>

- To enable and configure instructions for the “I Accept” checkbox:  
Policy Manager > Submission Policies > Configure Author Accept checkbox.



# Collecting Information

Asking the right questions!

- Author Questionnaires
- Contributing Author Questionnaires
- Reviewer Forms
- Editor Forms

# Author Questionnaires

**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
- Suggest Reviewers
- Oppose Reviewers
- Select Region of Origin
- Attach Files

Please Enter the Following Insert Special Character

---

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

---

Do you have any potential conflict-of-interest with any of the members of the editorial board? Click [here](#) to view the current list.

Answer Required:  Character Count: 0 Limit 200 characters

Questions can have radio buttons for responses?

Please select a response  
 True  
 False

Questions can be yes / no / text questions

Answer Required:  Please select a response  
 yes  
 no  
 n/a

Please explain.

Answer Required:  Character Count: 0 Limit 200 characters

- The submission step 'Additional Information' allows a publication to display a set of custom 'questions' that can be answered by the Author during the 'Submit Manuscript' process
- Examples of responses:
  - List
  - Follow-up questions
  - Date
  - Integer
  - Notes
  - Text
  - Decimal
- Use HTML to format text and to include links to outside sources

# Contributing Author Questionnaire

If you ARE a coauthor on this article, and have READ and AGREE to the following Copyright Transfer, Disclosure, and Authorship criteria, please click this link once: [Yes, I am affiliated.](#)

**Warning! You must submit this page to verify your contribution to the submission.**

Print

## Verify Contributing Authorship

[Insert Special Character](#)

If you are unable to complete your responses at this time, please click on the "Save for Later" button to save your work. To return to this page later, click on the Verify deep link in the email that you were sent regarding this submission, or save the following URL and enter it in your browser's address bar.

<http://em-qa.editorialmanager.com/diannetest131/l.asp?i=551&l=46T1DT58>

Please respond to the questions/statements below and click on the "Submit to Publication" button to complete your Co-Author verification for the submission.

If you do not submit your responses, your contribution will not be confirmed. If you click on the "Save for Later" button, your contributing authorship will not be confirmed, but you can return to this page later to complete your responses.

Custom questions and responses can also appear on the Transmittal Form?

Please select a response

Yes

No

Save for Later

Submit to Publication

- Contributing authors can be asked to complete questionnaires using the "Co-Author Verification" functionality

# Author Questionnaires

Creating questionnaires - putting the pieces together.

1. Create a library of questions
2. Create a questionnaire and add custom questions
3. Assign the questionnaire to an Article Type
  - Questionnaires can be asked at initial submission or revision





# Author Questionnaires

## Questionnaire Policies

Create Custom Questions

Create Questionnaires

Edit Co-Author Questionnaire Instructions



## STEP 1. Create questions in Policy Manager– Questionnaire Policies

### 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>	Custom questions and responses can also appear on the Transmittal Form?
<a href="#">Edit</a>	Do you have any potential conflict-of-interest with any of the members of the editorial board? Click <a href="#">here</a> to view the current list.
<a href="#">Remove</a> <a href="#">Edit</a>	Questions can have radio buttons for responses?
<a href="#">Remove</a> <a href="#">Edit</a>	§ Questions can be yes / no / text questions
<a href="#">Remove</a> <a href="#">Edit</a>	Questions can be answered in a text box.

# Author Questionnaires

**STEP 2.** Add questions to questionnaires in Policy Manager – Questionnaire Policies



### Configure Questionnaire

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

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

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

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

**Question Display Order:**

Order	Question	Required	Include in Merge Field	Actions
<input type="text" value="1"/>	Do you have any potential conflict-of-interest with any of the members of the editorial board? Click <a href="#">here</a> to view the current list.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
<input type="text" value="2"/>	Questions can have radio buttons for responses?	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
<input type="text" value="3"/>	§ Questions can be yes / no / text questions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
<input type="text" value="4"/>	Questions can be answered in a text box.	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>

- Questions can be required or optional

# Author Questionnaires

Set "Additional Information" Preferences:

Designate Submission Questionnaire:	Author Questionnaire ▼	Author Questionnaire ▼
Designate Author Questionnaire:	Sample Questionnaire ▼	Sample Questionnaire ▼

Original submission                      Revision

**STEP 3.** Assign questionnaire to individual Article Types in Policy Manager – Edit Article Types.

- Questions can be asked at initial submission or revision

**Co-Author Parameters**

**Register/Verify Other Authors**

Co-Authors verify on new submission ▼

Authenticated ORCID iD Request: Hidden ▼

Display Author Questionnaire to Co-Authors

- Using Co-Author verification functionality allows you to ask Co-Authors questions

# Reviewer Forms

Proxying for Bob Dylan - Reviewer

**Reviewer Main Menu**

**Review Assignments**

- [New Reviewer Invitations \(1\)](#)
- [Pending Assignments \(0\)](#)
- [Completed Assignments \(0\)](#)



Page: 1 of 1 (1 total submissions)

Action	Manuscript Number	Article Type
<a href="#">View Submission</a> <a href="#">Agree to Review</a> <a href="#">Decline to Review</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a>	MSC test 49	Original Stud



- [View Submission](#)
- [Similar Articles in MEDLINE](#)
- [Submit Recommendation](#)
- [Send E-mail](#)

- Reviewers can also be sent deep links in the invitation to accept/decline to review
- Reviewers can be 'assigned' to bypass invitation element

# Reviewer Forms

**Reviewer Recommendation and Comments for Manuscript Number cbk17 -005**

Questionnaires

Original Submission  
Bob Becker (Reviewer 1)

Recommendation:  Overall Manuscript Rating (1-100):

**Manuscript Rating**

Please answer the following questions using a rating scale where 1 is low and 10 is high.

\*Please rate you EMUG experience.

N/A  1  2  3  4  5

\*Please rate the manuscripts interest to our readers.

N/A  1  2  3  4  5  6  7  8  9  10

\*Would you consider the material presented time sensitive?

N/A  1  2  3

**Review Questions**

\*Do you think our readers will be interested in this topic? [Insert Special Character](#)

\*Would you be willing to look at a revision?

\*Would you like to receive CME credit for this review (up to 3 credits can be claimed)?

**Response required**  
Please describe the impact this manuscript review had on your professional practice i.e. improving your skills, identifying gaps in your knowledge, obtaining new information relevant to your research and/or practice.  
(Limit 20000 Characters)

Character Count: 0

- In addition to the standard “Comments to Author” and “Comments to Editor” boxes, you can also include Manuscript Rating and Custom Review Questions on the Review Form

# Reviewer Forms

☐ **Reviewer and Editor Form Policies**

**Manuscript Rating Question Configuration**

- [Edit Manuscript Rating Questions](#)
- [Overall Manuscript Rating Question Settings](#)
- [Edit Manuscript Rating Instructions](#)

**Reviewer Recommendation Policies**

- [Edit Reviewer Recommendation Terms](#)
- [Create/Edit Custom Review Questions](#)
- [Create/Edit Review Forms](#)
- [Match Review Forms to Article Types and Reviewer Roles](#)
- [Set Pending Assignments Deep Link Expiration](#)
- [Set Reviewer Recommendation Deep Link Expiration](#)

## Add Manuscript Rating Question

[Insert Special Character](#)

Add Manuscript Rating Question:

*Maximum Manuscript Rating Question length is 256 characters.*

Choose the Manuscript Rating scale for this question:

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

- Manuscript Rating Questions are configured in Policy Manager

# Reviewer Forms

## Review Form and Manuscript Rating Configuration

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

Cancel Submit

Display Manuscript Rating Question Responses to Author for all Reviewer Roles/Article Types

Reviewer Role	Reviewer	EB Reviewer	Test Reviewer
Article Type			
	New: EMUG <input checked="" type="checkbox"/> Use Manuscript Rating Questions Select <input type="checkbox"/> Display Responses to Author Revised: Default Review Form	New: EMUG <input checked="" type="checkbox"/> Use Manuscript Rating Questions Select <input type="checkbox"/> Display Responses to Author Revised: Default Review Form	

Original Study

## Reviewer Manuscript Rating Questions Original Study / Reviewer

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

Select All

Select	Order	Manuscript Rating Question	Answering the Question is:
<input type="checkbox"/>		A) The subject addressed in this article is worthy of investigation here	<input type="radio"/> Required <input type="radio"/> Optional
<input type="checkbox"/>		B) The information presented was new.	<input type="radio"/> Required <input type="radio"/> Optional
<input type="checkbox"/>		C) The conclusions were supported by the data.	<input type="radio"/> Required <input type="radio"/> Optional
<input checked="" type="checkbox"/>	1	D) Please rate you EMUG experience.	<input checked="" type="radio"/> Required <input type="radio"/> Optional
<input checked="" type="checkbox"/>	2	E) Please rate the manuscripts interest to our readers.	<input checked="" type="radio"/> Required <input type="radio"/> Optional
<input checked="" type="checkbox"/>	3	F) Would you consider the material presented time sensitive?	<input checked="" type="radio"/> Required <input type="radio"/> Optional

Apply these Questions to All Reviewer Role / Article Types

- Select the rating questions
- Assign them to a Review Form
- Review Forms are assigned by Reviewer Role and Article Type

# Reviewer Forms

## Add Custom Review Question

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

Reviewer responses must be configured to use a specific Response Type: **Text** and **Notes** responses can contain any mix of characters and numbers. A **Date** response must be entered in a mm/dd/yyyy format. **Integer** and **Decimal** responses can contain only a number or decimal point. A **List** response requires the Reviewer to select from the list of responses. If **List** is chosen for the response type, additional options will appear which allow configuration of the list choices and type (dropdown, radio, checkboxes or scrolling selector). The **Yes/No** and **Yes/No/NA** response types will create a dropdown list with the options of Yes, No and Yes, No, Not Applicable, respectively. The **Yes/No/Text** response type will display a text box to gather additional information if the user chooses an option which requires further clarification.

**Question:** [Insert Special Character](#)

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

- Hide:** When you **Hide** a Custom Review Question, the question is deactivated (not available for use with new Review Forms).
- Available for Decision Letter Merging:** When you select this checkbox, both the question and answer can be merged into the decision letter using the %REVIEW\_QUESTIONS\_AND\_RESPONSES% or %RESPONSES\_AND\_INDIVIDUAL\_COMMENTS\_TO\_AUTHOR% merge fields. Editors will be able to de-select individual responses from any Reviewer before the Author is notified. The question and answer will also be inserted into Reviewer Invitation/Assignment Letters by the %REVIEWER\_RESPONSES\_AND\_INDIVIDUAL\_COMMENTS\_TO\_AUTHOR% merge field, for those reviews explicitly selected by the Editor for inclusion

**Response Type:**

Yes/No/Text ▼

**Trigger Value for Additional Information Request:**

Yes  
 No

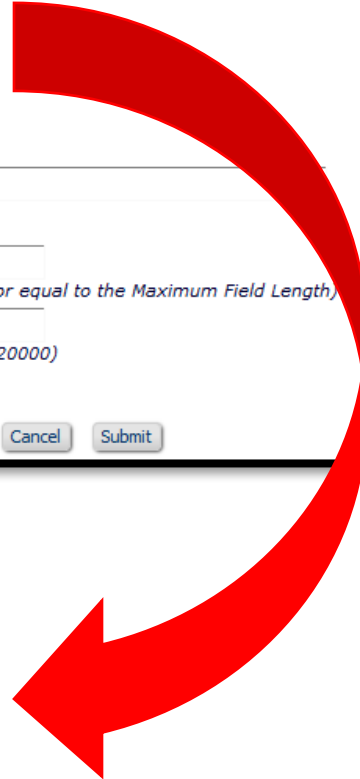
**Additional Information Request Text:**

**Additional Information Minimum Field Length:**

0  
*(Must be less than or equal to the Maximum Field Length)*

**Additional Information Maximum Field Length:**

*(A value from 1 to 20000)*



- Text
- Date
- Integer
- Decimal
- Notes
- List
- Yes/No
- Yes/No/NA
- Yes/No/Text



# Reviewer Forms

## Select Custom Review Questions for Review Form

Custom Review Questions available for use on the Review Form are displayed below. Select the questions you wish to add, and click the 'Add to Form' button to add them to the Review Form. Questions displayed in gray text have already been added to the Form and cannot be selected again.

### Custom Review Questions:

#### Select Description

- Please rate the value of the research
- Do you think our readers will be interested in this topic?*
- Would you be willing to look at a revision?*
- Would you like to receive CME credit for this review (up to 3 credits can be claimed)?*

Add To Form

Cancel

- Select the questions you want on your Review Form

- Indicate whether the question is required
- Should the response be viewable by other reviewers or the author?

### Edit Review Form

**Review Form Name:**

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

**Reviewer Instructions:**

**Display Reviewer Instructions in popup** [Insert Special Character](#)

Instructions for reviewers can be displayed directly on the review form.

---

**Custom Review Questions**

[Select Questions](#)

Order	Question	Required for Submission	Visible to Other Reviewers	Visible to Author	Actions
1	Do you think our readers will be interested in this topic?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>

**Display Comments to Author text box**

Merge into Editor Comments in Decision Chain  
 Keep separate from Editor Comments in Decision Chain

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

---

**Display Comments to Editor text box**

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

---

The following sections may be displayed to the Reviewer on the Reviewer Recommendation Page. Please select the order in which you would like them to appear. Note that Manuscript Rating Questions are configured elsewhere and do not appear for revisions. This setting determines where they will display on the Review Form only when applicable.

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

[Update Order](#)

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

# Reviewer Forms

## Review Form and Manuscript Rating Configuration

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

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

# Editor Forms

### Edit Editor Form - Default Editor Form

The Editor Form is displayed when the Editor clicks the 'Submit Editor's Decision and Comments' link. Editor Forms can ([more...](#))

**Editor Form Name:**

**Editor Instructions:** [Insert Special Character](#)

After reviewing the comments from Reviewers, please choose your Decision term.

<b>The Comments to Author text box is editable and contains the comments from all Reviewers, to the Author. This will be merged into the decision letter.</b>

<u>The Comments to Editor text box contains the comments from all Reviewers, to the Editor. You can cut and paste relevant comments from here into the Comments to Author field above, if you want them to be sent to the Author.</u>

<a href="http://forms.tandfonline.com/feedback/press-nomination"\_blank" target="blank"> </a>

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

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

## System Administrator Functions - Policy Manager - Reviewer and Editor Form Policies

### Current Editor Decision Phrase List + Add Editor Decision Phrase

	Editor Decision Phrase 1
	This allows you to create short snippets of text or longer sections of explanation for the body of the decision letter.
	They are also displayed when viewing the Editors recommendation.
	This is a very good paper which would benefit from some small changes prior to publication.

[+ Add Editor Decision Phrase](#)

Display Custom Review Questions and Responses Grid

---

**Order**

- 1 'Confidential Comments to Editor/Author' textboxes
- 2 Manuscript Rating Questions (when displayed)
- 3 Custom Review Questions and Responses (when displayed)
- 4 Editor Decision Phrases (when displayed)

[Update Order](#)

---

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

[Configure Editor Decision Phrases](#)

# Editor Forms

Managing Editor Decision and Comments for Manuscript Number DEMO.2017.0007

Tea is Essential to Life!

Original Submission  
mary mary (Managing Editor)

Decision:  Overall Editor Manuscript Rating (1-100):

[Details](#) [History](#) [Attachments \(0\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Manuscript Rating Card](#) [Send E-mail](#)

## Original Submission

<a href="#">Rosie Reviewer</a> (Reviewer 2)	[Terminated by Managing Editor]
<a href="#">Anna Walton</a> (Reviewer 3)	[Terminated by Managing Editor]
<a href="#">mary mary</a> (Managing Editor)	Partial Decision Saved
Author Decision Letter	
<a href="#">Andy Author</a> (Author)	

## Editor Decision Phrases

Editor Decision Phrases available for inclusion in the Decision Letter are displayed below. Select the phrases you wish to include.

### Select Phrase

Editor Decision Phrase 1

# Editor Forms

Editor Instructions

## Editor Decision Phrases

Preview Selected Phrases

Editor Decision Phrases available for inclusion in the Decision Letter are displayed below. Select the phrases you wish to include.

### Select Phrase

- Editor Decision Phrase 1
- This allows you to create short snippets of text or longer sections of explanation for the body of the decision letter.
- This is a very good paper which would benefit from some small changes prior to publication.
- They are also displayed when viewing the Editors recommendation.

## Confidential Comments to Editor

[Insert Special Character](#) [Open in New Window](#)

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

## Comments to Author

[Insert Special Character](#) [Open in New Window](#)

# Editor Forms

**Editor Decision and Comments for Manuscript Number DEMO.2017.0010**

**Tea is Essential to Life!**  
Original Submission  
Eddie Editor (Editor)

Decision:  Overall Editor Manuscript Rating (1-100):

[Details](#) [History](#) [Attachments \(0\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Manuscript Rating Card](#) [Send E-mail](#)

Original Submission	
Eddie Editor (Editor)	Assigned - No Decision
Author Decision Letter	
W Worm (Author)	


If the decision is Revise, the author has  days to revise this submission.

These instructions are customizable by the journal.

The subject addressed in this article is worthy of investigation.  
     
N/A 1 2 3

The information presented was new.  
       
N/A 1 2 3 4 5

The conclusions were supported by the data.  
             
N/A 1 2 3 4 5 6 7 8 9 10



**Break Time!**  
**(see you in 10 minutes)**





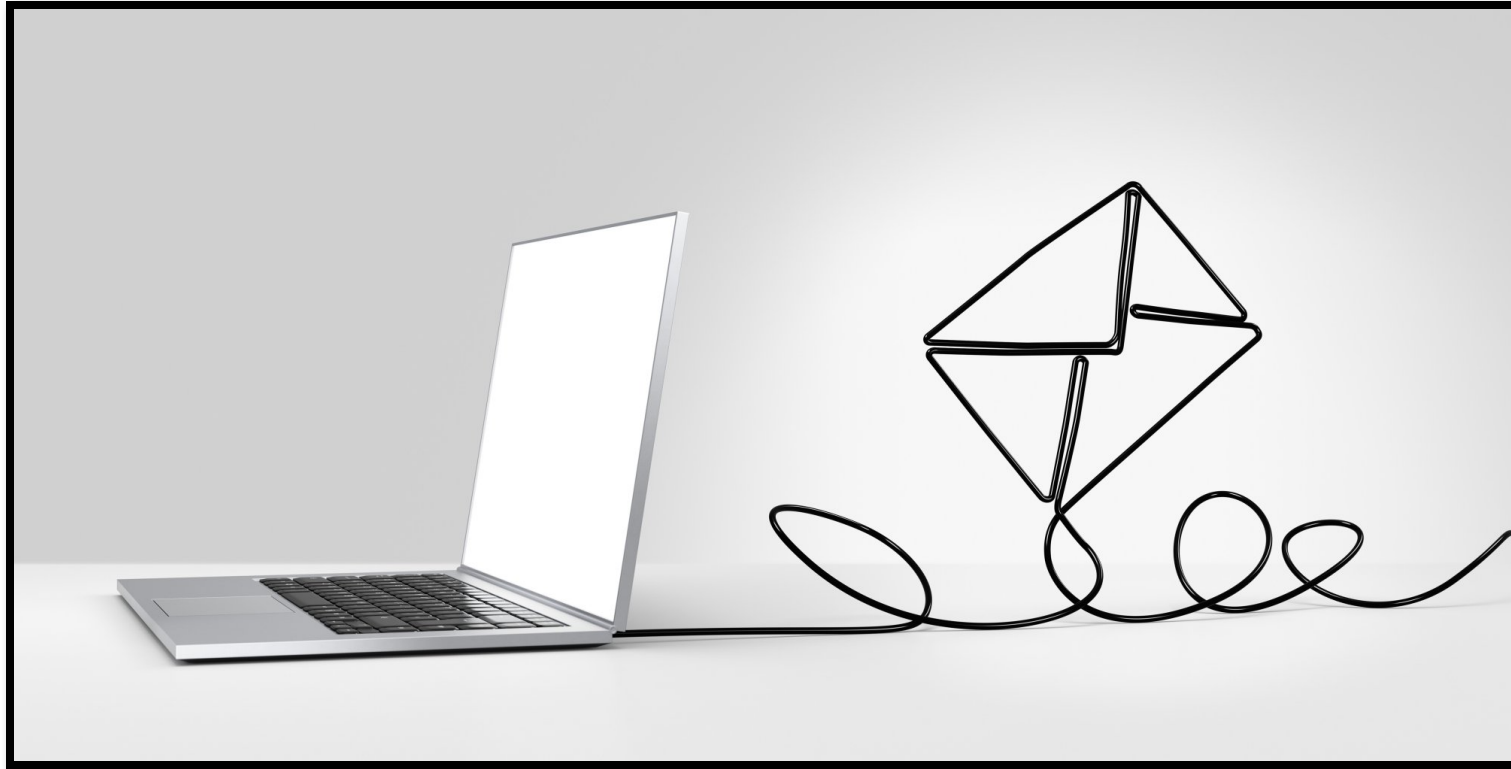
# Features of Letters



# Features of Letters

- Creating and Configuring Letters
  - Letter Options
  - Letter Content Options
  - Rich Text (HTML) in Letters
  - Associating letters to Action Manager events
- Attach Files to Letters
  - Attachments for Decision Letters
- Merge Fields and Deep Links
- Managing External Correspondence
- Editing and Resending Letters

# Creating and Configuring Letters



Editors with permission can create and modify letters:

System Administration > Policy Manager > Email and Letter Policies > Edit Letters

# Letter Families

- 23 Letter Families:
  - Used to organize letters
  - Determine how a letter can be used
- Examples of Families:
  - Editor Reminders
  - Reviewer Invitations
  - Ad Hoc Letters
  - Decision
  - General
  - Production

# Letter Families

- Each Letter Family has different configuration options
  - Recipients – Individual Reviewer, All Reviewers, Corresponding Editor, Author, etc.
  - CC or BCC Recipients, Text box to enter email, Co-Authors
  - Sender – Publication email, Corresponding Editor, Handling Editor, etc.
  - Attachments - Available for all letter families except Batch emails

# Merge Fields and Deep Links

- System Merge Fields and Custom Merge Fields
  - Pull in information about the submission and/or Authors, Reviewers and Editors
  - Create your own custom merge fields
- Deep Linking Merge Fields
  - Merge as a link in letters
  - Brings recipient to locations in the system
  - Allows recipients to accept or decline invitations directly from email

# Letter Templates (Edit Letters)

## Sort by Letter Purpose or Letter Family

### Edit Letters

This site is a master site for the Shared Letters feature. To share letters across all publications in a Shared Letters group, first add Subscriber Sites in AdminManager. Then, select the Share Letter checkbox for each letter template that you want to be available to subscriber sites, then click the 'Save Changes and Update Subscriber Sites' button. [\(more...\)](#)

[View Subscriber Sites](#)  
[Back to PolicyManager](#)

[Add New Letter](#) [Save Changes](#) [Edit Image Files for Letters](#)

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format			
			Text	Rich Text (HTML)	All Formats	
Ad hoc from Editor - DMJ	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide	
ad hoc from editor template	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide	
Afd hoc from edigtor to other author	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide	
asce rest line breaks	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide	
Author - Other Author Verification %MS_NUMBER%	Co-Author Communications	<a href="#">Author</a> - Notify Other Authors	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide	

# Remove/Hide Letters

Ad hoc from Editor - DMJ	Ad Hoc From Editor		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove   Hide
ad hoc from editor template	Ad Hoc From Editor		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove   Hide

Letters can be hidden, removed or restored.

Hidden letters are displayed in gray at the bottom of the list of letters.

Hidden Letters							
Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	ActionManager Roles and Events	Letter Format			All Formats	
			Text	Rich Text (HTML)			
*testing for NPG	Production		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove   Restore
Reviewer Notification of Editor Decision	Reviewer Notification		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove   Restore



# Rich Text (HTML) Letters

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		All Formats
			Text	Rich Text (HTML)	
Ad hoc from Editor - DMJ	Ad Hoc From Editor		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
ad hoc from editor template	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
Afd hoc from edigtor to other author	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
asce rest line breaks	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
Author - Other Author Verification %MS_NUMBER%	Co-Author Communications	Author - Notify Other Authors	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide

# Creating Letter Templates

## Edit Letters

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

[Back to PolicyManager](#)

Add New Letter

Save Changes

Edit Image Files for Letters



## Add 'General' Letter

Please type (or paste) a text-formatted letter into the Letter Body box below. This default letter should not include HTML tags. To incorporate HTML tags, click 'Save' on this page to save the text-formatted letter and then select the 'HTML format' radio button from the 'Edit Letters' page and click the Edit link. HTML tags may then be added.

Letter Purpose:

Subject:

Letter Family:  ▼

Cancel

Continue

# Creating Letter Templates

Custom Instructions

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

[View Default Instructions](#) [Revert to Default Instructions](#)

Letter Purpose:

Subject:

Letter Family:

Sender's E-mail Address

<trash1@ariessc.com>

Use Corresponding Editor's E-mail address

Use Corresponding Production Editor's E-mail address

**Additional Recipients**

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

**Automatically** cc: bcc:

Corresponding Editor

Corresponding Production Editor

Send copies to the following addresses:  
(Multiple addresses may be entered, separated by a semicolon)

cc:

bcc:

Allow attachments

Allow sender to add Rich Text (HTML) formatting

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

# Creating Letter Templates

```
Dear %TITLE% %LAST_NAME%,

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

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

This is the abstract:
%ABSTRACT%

If you would like to review this paper, please click this link: %ACCEPT_REVIEW_INVITATION%

If you do not wish to review this paper, please click this link:
%DECLINE_REVIEW_INVITATION%

If the above links do not work, please go to %JOURNAL_URL%. Your User Name is %USERNAME%
and your password: %PASSWORD%.

The manuscript reference is %MS_NUMBER%.

If possible, I would appreciate receiving your review by %REVIEW_DUE_DATE%
```

- Use merge fields to pull information into your letter
- Use deep links to provide easy access to EM

# System Merge Fields

The screenshot shows a web-based letter editor. The main text area, titled "Letter Body:", contains a draft letter with several merge fields: `{TITLE}`, `{LAST_NAME}`, `{ABSTRACT}`, `{DECLINE_REVIEW_INVITATION}`, `{PASSWORD}`, and `{MS_N}`. A red box highlights a menu at the top right with options: "Insert Custom Merge Field" and "Insert System Merge Field".

An "Insert System Merge Fields" dialog box is open in the foreground. It has a blue header and a close button. The dialog contains the following text: "You can drag and drop merge fields from here to the letter Subject or Body. (more...)". Below this is a search input field and two buttons: "Expand All" and "Collapse All". A list of merge fields is shown below, each with a collapse/expand icon and a description:

- `%ABSTRACT%`  
Abstract of the manuscript
- `%ACCEPT_EDITOR_INVITATION%`
- `%ACCEPT_INVITATION%`
- `%ACCEPT_REVIEW_INVITATION%`  
Inserts a hyperlink in a letter that automatically triggers the 'Agree to Review' function in the system. The Reviewer will be

At the bottom of the editor are "Cancel" and "Save" buttons.

# Creating Letter Templates

## Letter body template

```
Dear %TITLE% %LAST_NAME%,

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

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

This is the abstract:
%ABSTRACT%

If you would like to review this paper, please click this link: %ACCEPT_REVIEW_INVITATION%

If you do not wish to review this paper, please click this link:
%DECLINE_REVIEW_INVITATION%

If the above links do not work, please go to %JOURNAL_URL%. Your User Name is %USERNAME%
and your password: %PASSWORD%.

The manuscript reference is %MS_NUMBER%.

If possible, I would appreciate receiving your review by %REVIEW_DUE_DATE%
```

## Recipient letter

```
Dear Dr. Becker,

You have been invited to review a manuscript for Dianne Test 13.1.

I would be grateful if you would review a paper entitled "EMUG 2017 Boot Camp" for this journal.

This is the abstract:
Testing Reviewer Letters nsc108872 3-10-17 R1 add a pic.

If you would like to review this paper, please click this link: http://em-qa.editorialmanager.com/diannetest131/l.asp?i=540&l=EMPOTT8A *

If you do not wish to review this paper, please click this link: http://em-qa.editorialmanager.com/diannetest131/l.asp?i=541&l=62JNYUYK *

If the above links do not work, please go to http://em-qa.editorialmanager.com/diannetest131/. Your User Name is bob and your password: bob.

The manuscript reference is cbk17 -002R1.

If possible, I would appreciate receiving your review by 31 May 2017 With kind regards

Ed Editor
```

Dear Dr. Becker,

You have been invited to review a manuscript for Dianne Test 13.1.

I would be grateful if you would review a paper entitled "EMUG 2017 Boot Camp" for this journal.

This is the abstract:

Testing Reviewer Letters nsc108872 3-10-17 R1 add a pic.

If you would like to review this paper, please click this link: <http://em-qa.editorialmanager.com/diannetest131/l.asp?i=540&l=EMPOTT8A> \*

If you do not wish to review this paper, please click this link: <http://em-qa.editorialmanager.com/diannetest131/l.asp?i=541&l=62JNYUYK> \*

If the above links do not work, please go to <http://em-qa.editorialmanager.com/diannetest131/>. Your User Name is bob and your password: bob.

The manuscript reference is cbk17 -002R1.

If possible, I would appreciate receiving your review by 31 May 2017 With kind regards

Ed Editor

- Clicking on a deep link logs the user into EM and brings them to a specific page by-passing the need to enter a user name and password

## Agree to Review Confirmation

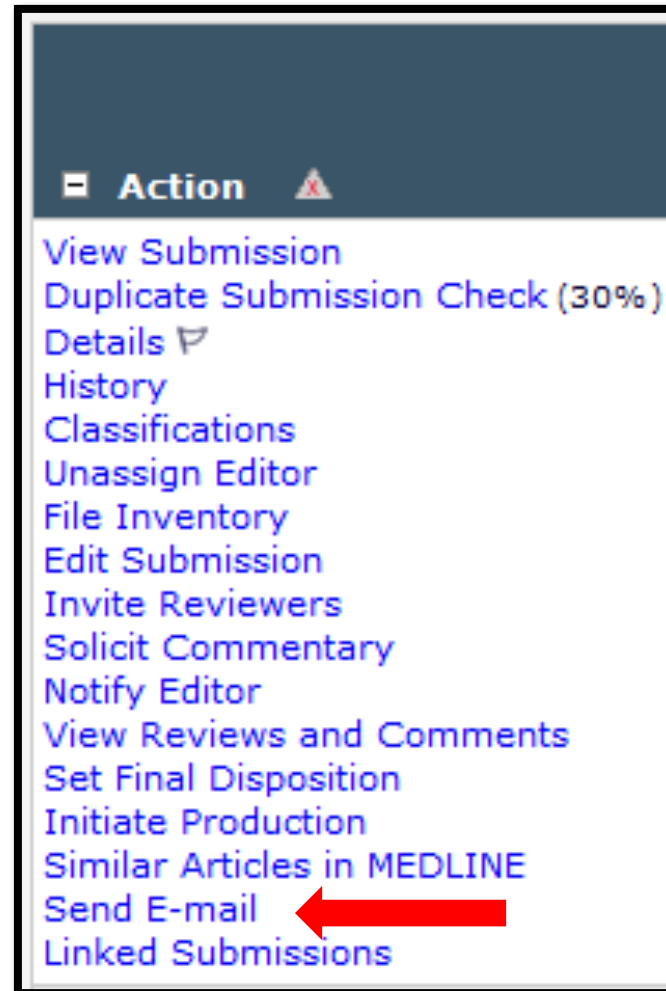
**Thank you for agreeing to review Manuscript Number cbk17 -002R1.**  
To view the manuscript, please click the 'Pending Assignments' link below.

[Log out of Editorial Manager](#)

[Pending Assignments](#)

[Main Menu](#)

# Ad Hoc Letters



A screenshot of a software interface showing a dropdown menu titled "Action". The menu is open, displaying a list of actions in blue text. A red arrow points to the "Send E-mail" option. The menu items are: View Submission, Duplicate Submission Check (30%), Details (with a small downward arrow), History, Classifications, Unassign Editor, File Inventory, Edit Submission, Invite Reviewers, Solicit Commentary, Notify Editor, View Reviews and Comments, Set Final Disposition, Initiate Production, Similar Articles in MEDLINE, Send E-mail, and Linked Submissions.

- View Submission
- Duplicate Submission Check (30%)
- Details ▾
- History
- Classifications
- Unassign Editor
- File Inventory
- Edit Submission
- Invite Reviewers
- Solicit Commentary
- Notify Editor
- View Reviews and Comments
- Set Final Disposition
- Initiate Production
- Similar Articles in MEDLINE
- Send E-mail ←
- Linked Submissions



# Creating Ad Hoc Letter Templates

Letter Purpose: EMUG 2017

Subject: EMUG 2017

Letter Family: Ad Hoc From Editor

Editor Roles That Can Send This Letter


None Selected  
ALL EDITOR ROLES  
Managing Editor  
Editor  
Editorial Assistant

Select All  
Clear All


Sender's E-mail Address

Use E-mail address of user triggering the Correspondence  
 <trash1@ariessc.com>  
 "The Journal" <trash1@ariessc.com>

Recipient:

trash1@ariessc.com  
 User Selects Recipient using  icon  
 Corresponding Editor  
 Corresponding Production Editor  
 Display text box so sender can insert an e-mail address  
 Display the following e-mail address for the recipient:  
(Multiple addresses may be entered, separated by a semicolon)

First Assigned Editor  
 Handling Editor  
 Editor who made the first Editor assignment  
 All Reviewers of the current revision of the submission  
 Display all Reviewers of the current revision so sender can select recipient(s)  
 Corresponding Author

- Letters in the “Ad Hoc from Editor” and “Ad Hoc from Publisher” letter families have the additional recipient option of “User Selects Recipient using  icon”

# Creating Ad Hoc Letter Templates

## Additional Recipients

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

## Automatically cc: bcc:

- All Co-Authors
- Corresponding Editor
- Corresponding Production Editor

Send copies to the following addresses:

(Multiple addresses may be entered, separated by a semicolon)

cc:

bcc:

**Allow choice on 'Send Letter' page** The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

- cc: bcc:
- Display checkbox for co-Authors
  - Display checkbox for Reviewers assigned to current Revision
  - Display checkbox for Editors assigned to current Revision

Display e-mail entry box on 'Send Letter' page:

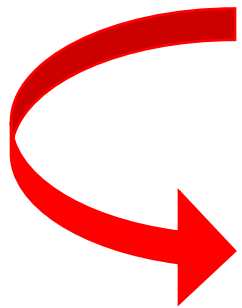
- cc:(Allow sender to manually enter cc: recipients)
- bcc:(Allow sender to manually enter bcc: recipients)

Allow attachments

- Other recipient options:
  - Cc
  - Bcc
  - Pre-defined recipient
  - Checkboxes
- Allow Attachments

# Sending Ad Hoc Emails

Action	Manuscript Number	Article Type	Section/Category	Article Title
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (8%)</a> <a href="#">Details</a> ▾ <a href="#">History</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Invite Reviewers</a> <a href="#">Solicit Commentary</a> <a href="#">Notify Editor</a> <a href="#">View Reviews and Comments</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	cbk17 -002R1	Original Study		EMUG 2017 Boot Camp



- Authors, Reviewers and Editors and Publishers with permission can send ad hoc emails by clicking on the “Send E-Mail” action link

Sending E-mail

Send Batch E-Mail

Send Ad Hoc E-mail

Permissions are set in Role Manager

# Sending Ad Hoc Emails

## Details Page

<b>Name:</b>	  Ed Editor  [Proxy]
<b>Role:</b>	Editor
<b>Date Assigned:</b>	10 Mar 2017
<b>Date Completed:</b>	
<b>Elapsed Days:</b>	69
<b>Recommendation:</b>	
<b>Reviewers</b>	
<b>Name:</b>	  Bob Becker (Reviewer)  [Proxy]
<b>Review Status:</b>	Reviewer Invited
<b>Date Reviewer Invited:</b>	18 May 2017
<b>Date Review Due:</b>	<input type="text" value="05/31/2017"/>  (mm/dd/yyyy)
<b>Elapsed Days:</b>	0

- Clicking on the email icon displays all of the letters that have this feature enabled
- If there is only one letter configured with this recipient option, the editor is taken directly to the customize letter interface

# Rich Text (HTML) Letters

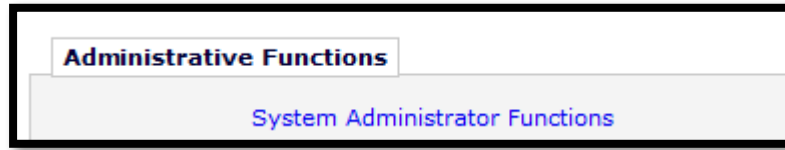
- HTML can be used for:
  - Inserting formatting (bold text, colored text, etc.)
  - Inserting images



- Deep Links display as text links in HTML. For example:
  - %PENDING\_ASSIGNMENTS\_DEEP\_LINK% vs. [Pending Assignments](#)

To download the paper now, please click this link: [View Submission](#) \*  
[Pending Assignments](#)

# Associating Letters to Action Manager Events



**em Editorial Manager™**

ROLEMANAGER • **ACTIONMANAGER** • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Role:Managing Editor Username: mary131

## ActionManager

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

- Document Status
- Author Letters
- Reviewer Letters
- EB Reviewer Letters
- Test Reviewer Letters
- Managing Editor Letters**
- Editor Letters

# Associating Letters to Action Manager Events

Reviewer Invited	<i>Original Submission:</i> Reviewer Invitation <i>Revision - Re-Invite:</i> Reviewer Invitation on Revision <i>Revision - First Invite:</i> Reviewer Invitation on Revision <a href="#">Select Letters</a>
Reviewer Assigned (Not Invited)	<i>Original Submission:</i> NONE <i>Revision - Re-Invite:</i> NONE <i>Revision - First Invite:</i> NONE
Reviewer Agree	<i>O</i> <i>R</i> <i>R</i>


**Select Letters** ✕

You may select a different default letter from the Reviewer Invitation letter family for each of the following cases:

Original Submission:


Revision - Re-Invite (Reviewer has reviewed a previous version):

Revision - First Invite (Reviewer has **not** reviewed a previous version):  
  
NONE  
Reviewer Invitation  
Reviewer Invitation on Revision



# Associating Letters to Action Manager Events

Transfer Letter	Transfer Letter	Managing Editor - Submission Transferred to Publication	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	
ucp	Ad Hoc From Editor		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove   Hide
Welcome	General	Author - New User Registers	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove   Hide



You are about to proceed to ActionManager to configure letters for the 'Author' Role. This will abandon any unsaved changes you may have made (for example, to selected Letter Formats). Are you sure you wish to proceed? Press Cancel to return and Save any changes.



# Editing and Resending Letters

- Any letter can be resent using the “Resend” button in the Correspondence History
- Role Manager permission allows editors to edit *and* resend letters
  - Edit recipient, CC/BCC recipients, letter body and subject line
  - Add/remove attachments
  - Decision letters can not be edited
- Co-Author confirmation letters should be sent from the Author Status link on the Details Page

# Editing and Resending Letters

View Editorial Correspondence History  
 Edit Letter when Resending

**CORRESPONDENCE HISTORY**

Add Editorial Correspondence

Correspondence Date	Letter	Recipient	Status	Revision	Operator
30 May 2017	<a href="#">Journal Office Notice All Reviews Complete</a>	mary mary	Required Reviews Completed	0	Tom Brady [Proxied by mary mary]
30 May 2017	<a href="#">Reviewer Thank You</a>	Tom Brady	Under Review	0	Tom Brady [Proxied by mary mary]

**View Letter**

Close **Edit and Resend** Resend

**Date:** 30 May 2017  
**To:** "Tom Brady" trash34@ariessc.com  
**From:** "" trash1@ariessc.com  
**Subject:** Thank you for the review of cbk17 -009

---

Ref.: Ms. No. cbk17 -009  
Key Criteria  
Dianne Test 13.1

# Editing and Resending Letters

## Edit and Resend Letter

Please note that merge fields cannot be populated during the resend process. Deep links will be regenerated and all previously merged fields will retain the merged text (as shown below), but newly added fields will not be merged into the letter.

---

**From:** trash1@ariessc.com

**To:**  "Tom Brady" trash34@ariessc.com (Original Recipient) [Update User's Address](#)

Additional recipients can be added (separated by semicolons) but please note that in the letter sent to manually added recipients, deep links and username/password information will be replaced by asterisks.

**Letter Subject:**  ←

Thank you for the review of cbk17 -009

If copies of the original letter were sent to additional recipients, they are listed below. You may add or remove recipients as desired. Multiple e-mail addresses can be included, separated by semicolons (;).

**cc:**  ←

**bcc:**

Letter Body: [Insert Special Character](#)

---

Ref.: Ms. No. cbk17 -009  
Key Criteria  
Dianne Test 13.1

# Attaching Files to Letters


Letters and automatic attachments for decision letters

### Customize Letter - Journal Office Query to Author

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

[Cancel](#) [Preview and Send](#)

**From:** "mary mary" <dgullo@ariessys.com>  
**To:** Corresponding Author;  
**Letter Subject:** your submission

 **Attachments:** [Add/Change Attachments](#)

# Attaching Files to Letters

[Cancel](#) [Proceed](#)

## Select Files

To add a file from your computer, use the Choose Files button to browse your computer, or drag and drop the files onto the folder image below.

**Caution:** Please be aware that many e-mail services limit the number or size of attachments that can be received and may not deliver the message if attachments exceed the limit.

Browse your computer:

[Choose Files](#)

Or drag and drop files here:



### Files Uploaded for Attachment

File Name	Size	Last Modified	Actions
Permission Verification.doc	20 KB	31 May 2017	<a href="#">Download</a> <a href="#">Remove</a>

### Add Files from Submission Inventory

Select the checkbox next to the file(s) you would like to attach.

[Submission Files](#)

#### System PDFs

A System PDF is the copy of the submission when the "View Submission" link is clicked. Depending on configuration, the Reviewer version and Editor/Author version may not contain the same items.

Select	Submission Revision	PDF Version	Size	Last Modified
<input type="checkbox"/>	Original	Editor/Author Version	207.4 KB	30 May 2017
<input type="checkbox"/>	Original	Reviewer Version	206.3 KB	30 May 2017

### Submission Files

[Top](#)

Select	File Name	Description	Item	Size	Last Modified
<input type="checkbox"/>	Manuscript.doc	Manuscript	Manuscript	22 KB	27 Aug 2013

- You can attach files from your computer or you can attach system files

# Attaching Files to Letters

## Customize Letter - Journal Office Query to Author

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Cancel

Preview and Send

From: "mary mary" <dgullo@ariessys.com>

To: Corresponding Author;

Letter Subject: your submission

Attachments: [Permission Verification.doc](#)  
[Manuscript.doc](#)  
[Add/Change Attachments](#)







# Attachment Configuration

## PolicyManager Main Menu

---

[Expand All](#)   [Collapse All](#)

- ⊕ Registration and Login Policies
- ⊕ Status Policies
- ⊕ Submission Policies
- ⊕ Questionnaire Policies
- ⊕ Additional Data Policies
- ⊕ Editor Assignment Policies
- ⊕ Reviewer and Editor Form Policies
- ⊕ E-mail and Letter Policies
- ⊕ General Policies
- ⊕ Discussion Forums
- ⊕ Linked Submissions Policies
- ⊕ Conference Submission Policies
- ⊕ Transmittal Policies
- ☐  ProduXion Manager
  -  **Configure Attachment Security**
  -  Edit Instructions for Attachments
  -  Set Attachments Deep Link Policy

# Attachment Sanitization

## Sanitization

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

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

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

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

- Remove Personal Information from Editor/Reviewer Attachments in Microsoft Office or PDF format.
- Allow other Reviewers access only to Attachments with personal information removed.



# Attachment Availability

## Availability

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

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

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

# Attaching Files to Decision Letters

## Author Access

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

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

- Authors can be sent attachments uploaded by reviewers or Editors

The following files can be made available to the Author. If the 'Allow Author Access' checkbox is selected, the file will be available to the Author. If the 'Allow Author Access' checkbox is NOT selected, the file will not be available to the Author.

### Attachments:

Action	Uploaded By	Description	File Name	Size	Upload Date	Allow Author Access
<b>Revision 1</b>						
<a href="#">Download</a> <a href="#">Download Sanitized Copy</a>	Steven Gain (Editor)	Attachment for Author	ReviewerPDF.pdf	566 KB	06/06/2016	<input checked="" type="checkbox"/>

[Upload Attachments](#)

[Cancel](#)

[Submit Decision without Notifying Author](#)

[Preview Letter](#)

[Save](#)

[Save and Close](#)

[Send Now](#)

# Managing External Correspondence

- Editors with permission can add Editorial or Production correspondence received outside of EM onto the History page of any submission



# Managing External Correspondence

- Editors with permission can add external correspondence to the history page
- Permissions are enabled in Role Manager > General Searching and Viewing

Add/Edit External Correspondence  
 Add Attachments to External Correspondence

**CORRESPONDENCE HISTORY**

[Add Editorial Correspondence](#)

Correspondence Date	Letter	Recipient	Status	Revision	Operator
30 May 2017	<a href="#">Journal Office Notice All Reviews Complete</a>	mary mary	Required Reviews Completed	0	Tom Brady [Proxied by mary mary]
30 May 2017	<a href="#">Reviewer Thank You</a>	Tom Brady	Under Review	0	Tom Brady [Proxied by mary mary]
30 May 2017	<a href="#">Journal Office Notice Completed Review</a>	mary mary	Under Review	0	Tom Brady [Proxied by mary mary]
30 May 2017	<a href="#">Reviewer Invitation</a>	Tom Brady	Under Review	0	mary mary [Proxied by mary mary]
30 May 2017	<a href="#">Reviewer Thank You</a>	Bob Becker	Under Review	0	Bob Becker [Proxied by mary mary]
30 May 2017	<a href="#">Journal Office Notice Completed Review</a>	mary mary	Under Review	0	Bob Becker [Proxied by mary mary]

# Managing External Correspondence

## Add External Editorial Correspondence

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

Note: Please check the text for any sensitive information that should be removed or obscured (such as passwords or names of reviewers), as the system cannot automatically anonymize correspondence you add manually.

Cancel Submit

\* Correspondence Date: 05/31/2017 (mm/dd/yyyy) Time: Hour: 08 Minute: 35 AM/PM: AM U.S. Eastern Time

\* Description: Boot Camp 2017 Query

From: Sally Green

To: Managing Editor

Letter Subject: Boot Camp 2017

Attachments: Add/Change Attachments

Letter Contents: [Open in New Window](#)

Rich text editor toolbar with icons for undo, redo, search, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, insert link, insert image, insert table, insert code, and insert link. Below the toolbar are dropdown menus for Styles, Format, Font, and Size, along with text color and background color pickers.

Cut and paste email or type notes from phone call into the letter body.

# Managing External Correspondence

CORRESPONDENCE HISTORY					
<a href="#">Add Editorial Correspondence</a>					
Correspondence Date	Letter	Recipient	Status	Revision	Operator
31 May 2017	<a href="#">Boot Camp 2017 Query</a> (External) <a href="#">Remove</a> <a href="#">Edit</a>				mary mary
30 May 2017	<a href="#">Journal Office Notice All Reviews Complete</a>	mary mary	Required Reviews Completed	0	Tom Brady [Proxied by mary mary]

# Reporting



# Reporting Features in Editorial Manager

- Searching
- Reminders
- Canned Reports
- Custom Reports
- General Data Export
- Enterprise Analytics Reports (EAR)

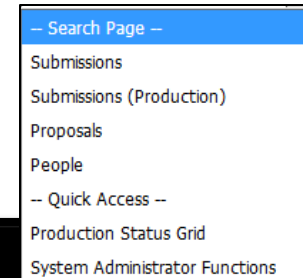


Searching

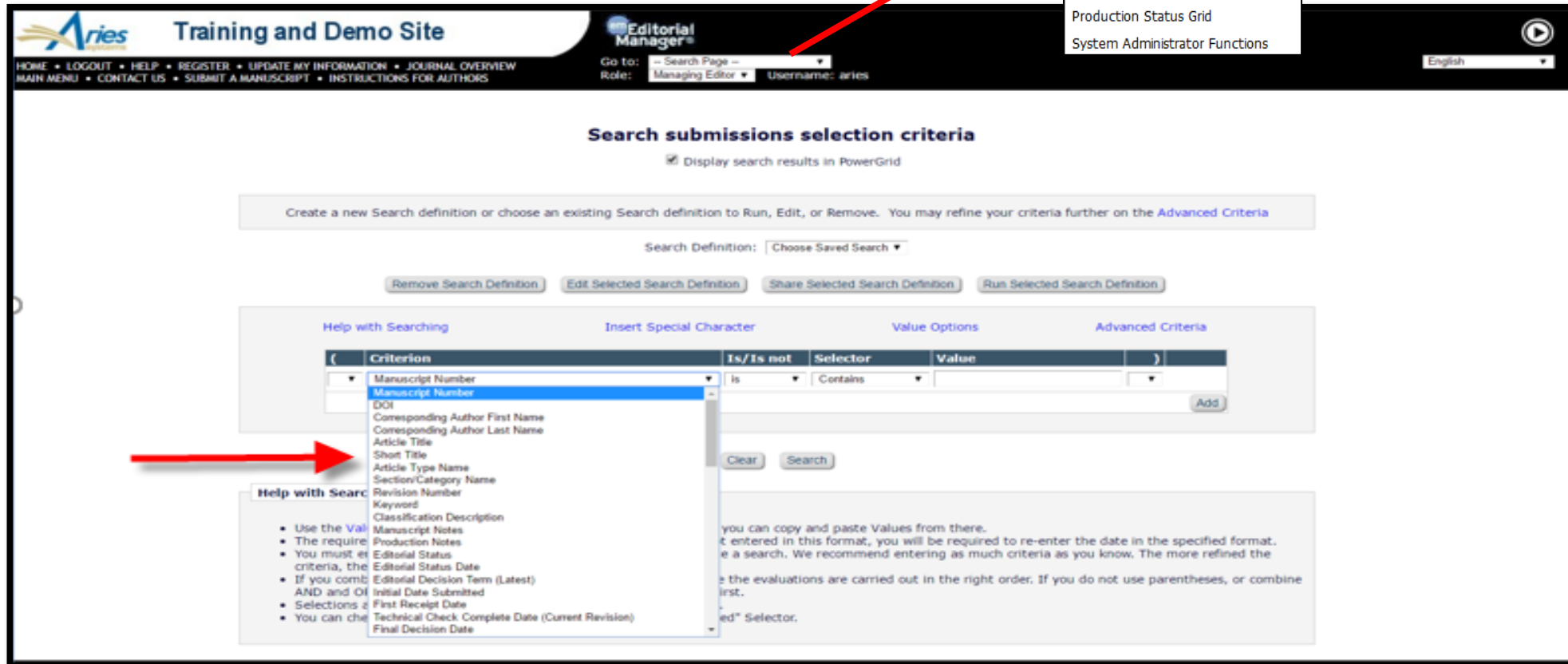


# Searching Submissions

- Two different permissions
  - Search all submissions within your publication
  - Search submissions assigned to you



– Search Page –  
Submissions  
Submissions (Production)  
Proposals  
People  
– Quick Access –  
Production Status Grid  
System Administrator Functions



The screenshot shows the Editorial Manager interface for searching submissions. At the top, there is a navigation bar with the Aries logo and 'Training and Demo Site'. Below this, there are links for HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. The user's role is 'Managing Editor' and the username is 'aries'. The main content area is titled 'Search submissions selection criteria' and includes a checkbox for 'Display search results in PowerGrid'. Below this, there are buttons for 'Remove Search Definition', 'Edit Selected Search Definition', 'Share Selected Search Definition', and 'Run Selected Search Definition'. A search definition dropdown is set to 'Choose Saved Search'. The main search area has tabs for 'Help with Searching', 'Insert Special Character', 'Value Options', and 'Advanced Criteria'. A table with columns 'Criterion', 'Is/Is not', 'Selector', and 'Value' is shown. A dropdown menu is open under the 'Criterion' column, listing various search criteria such as 'Manuscript Number', 'DOI', 'Corresponding Author First Name', etc. A red arrow points to the 'Manuscript Number' option in this dropdown. Another red arrow points to the 'Go to:' dropdown menu in the top navigation bar.

Criterion	Is/Is not	Selector	Value
(			)
Manuscript Number	Is	Contains	
DOI			
Corresponding Author First Name			
Corresponding Author Last Name			
Article Title			
Short Title			
Article Type Name			
Section/Category Name			
Revision Number			
Keyword			
Classification Description			
Manuscript Notes			
Production Notes			
Editorial Status			
Editorial Status Date			
Editorial Decision Term (Latest)			
Initial Date Submitted			
First Receipt Date			
Technical Check Complete Date (Current Revision)			
Final Decision Date			

# Searching Submissions

- Once you run the search you have the ability to:
  - Download the search results
  - Save the search to be run again at a later time
  - Save the search to be shared

## Search Submissions - Search Results

Editorial Status is equal to 'Under Review'

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

[Switch to Production View](#)

Page: 1 of 2 (19 total submissions)

1 2 >> >|

Display | 10 results per page.

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted	Reviewers	Review Status	Handling Editor	Assigned Editors	Section/Category
<a href="#">View Submission</a> <a href="#">View Reference Checking Results</a> <a href="#">Similarity Check/Thenticate Results (61%)</a> <a href="#">Duplicate Submission Check (80%)</a> <a href="#">Bibliometric Intelligence Results (87/56%)</a> <a href="#">Details</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Information</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="#">Send E-mail</a> <a href="#">Linked Submissions</a>	WEBDEM-D-17-00025		mary mary	13.1 Webinar - Alternate Reviewer Promotion functionality	Original Study				Under Review	Apr 26, 2017	Apr 25, 2017			Ellen Editor	Ellen Editor, PHD	
<a href="#">View Submission</a> <a href="#">View Reference Checking Results</a> <a href="#">Similarity Check/Thenticate Results (64%)</a> <a href="#">Duplicate Submission Check (54%)</a> <a href="#">Bibliometric Intelligence Results (87/56%)</a> <a href="#">Details</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Information</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="#">Send E-mail</a> <a href="#">Linked Submissions</a>	WEBDEM-D-17-00022		mary mary	Testing Alternate Reviewer Promotion	Original Study				Under Review	Apr 25, 2017	Apr 25, 2017			Ellen Editor	Ellen Editor, PHD	
<a href="#">View Submission</a> <a href="#">View Reference Checking Results</a> <a href="#">Similarity Check/Thenticate Results (61%)</a> <a href="#">Duplicate Submission Check (80%)</a> <a href="#">Bibliometric Intelligence Results (87/56%)</a> <a href="#">Details</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Information</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="#">Send E-mail</a> <a href="#">Linked Submissions</a>	WEBDEM-D-17-00013		mary mary	13.1 Webinar - Alternate Reviewer Promotion	Original Study				Under Review	Apr 20, 2017	Apr 18, 2017			Ellen Editor	Ellen Editor	

# Searching Submissions

- System Administrator Functions – Role Manager - Choose the relevant role
- Enable permissions using checkboxes and don't forget to save!

General Searching and Viewing

Use Editorial Details Layout

Search All Manuscripts

Search Only Assigned Manuscripts

Share Saved Searches

Administrative and Reporting Functions

System Administration Functions

- Unrestricted Access
- Restricted Access

Produce Reports

- Schedule Reports

Create Automated Reviewer Reminders

Send Reviewer Reminders

Send Editor Reminders

Create Automated Author Revision Reminders

Create Automated Author Transfer Reminders

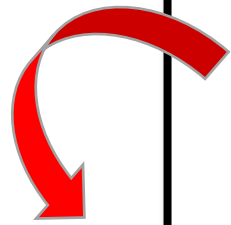
Send Author Reminders

Restrict Reminder Reports to Assigned Submissions

# Custom Flags – Searching

- Editors with permission may also use People Flag Name or Submission Flag Name as a search criterion in a variety of Search pages:
  - ‘Search Submissions’
  - ‘Search People’
  - ‘Search for Authors’
  - ‘Search for Reviewers’ when searching a user’s own publication
  - ‘Search Editor’ (when enabled)
  - ‘Editor Selection Summary’ (for the ‘Suggest Editor’ method of Editor assignment/invitation)
  - ‘Editor Selection Summary – Search for Editors Results/Switch to New Editor’ (for ‘Suggest Editor’ method of Editor assignment/invitation)

# Custom Flags – Searching



**em Editorial Manager™**

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

Go to: -- Search Page --  
 Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

### 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
Submission Flag Name	is	Equal To	Missing Copyright Transfer Inf <b>Missing Copyright Transfer Information</b> Manuscript needs grammatical work. Initiate collaboration on this with Author. Time-Sensitive Findings Reported–Shorten Review Turnaround

Clear Search

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Go to: -- Search Page --  
 Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

Quicklinks

### Search Submissions - Search Results

Submission Flag Name is equal to "Technical Check Passed"

Page: 1 of 1 (2 total submissions) 1 10 results

Action	Manuscript Number	Article Type	Article Title	Short Title	Keywords	Classification	Current Status	Status Date	Initial Date Submitted	Author Name	Reviewers	Review Status	Handling Editor	Assigned Editors	Section Category
View Submission Duplicate Submission Check (0%) <b>Details</b> Initiate Discussion History File Inventory Edit Submission Solicit Commentary Classifications View Reviews and Comments Rescind Decision Unassign Editor Notify Editor Invite Reviewers Set Final Disposition Project MUSE Send E-mail Linked Submissions	DEMOJES131-D-17-00001	Original Study	31014 Test				Decision in Process	Mar 24, 2017	Mar 24, 2017	mary mary			Edward Editor	Edward Editor Elaine Editor	
View Submission Duplicate Submission Check (30%) <b>Details</b> Initiate Discussion History Technical Information File Inventory Edit Submission Solicit Commentary Classifications Unassign Editor Notify Editor Invite Reviewers Set Final Disposition Project MUSE	DEMOJES131-D-17-00002	Original Study	Level 1 - Part 2 Training (#1)			20.400: Chickpeas 10.200: Kidney Beans 10.400: Lima Beans	Under Review	Mar 27, 2017	Mar 27, 2017	Arthur Author			Edward Editor	Edward Editor	

Reminders



# Reminders

- Author Reminder
- Reviewer Reminders
- Editor Reminders
- Summary



# Author Reminder Reports

- Five Different Author Reminder Reports
  - Co-Author Reminder
  - Author Revision Status Reminder
  - Author Revision Reminder
  - Automated Author Revision Reminder
  - Automated Author Transfer Reminder

# Automated Author Revision Reminder

- Create automated reminders for Author Revision- Emails sent once every 24 hours

**Automated Author Revision Reminder Reports**

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Author Revision reminder e-mails will be sent once every 24 hours to each recipient.

<b>Reminder Type:</b>	<input type="radio"/> <b>Outstanding Revisions:</b> Send an automated reminder e-mail to Authors who were asked to revise their submission exactly <input type="text" value="10"/> days ago. If Authors have already submitted their revision or have declined to revise, they will not receive a reminder.
	<input type="radio"/> <b>Reminder Before Revision Due Date:</b> Send an automated reminder e-mail for revisions that are exactly <input type="text" value="7"/> days before their due date. Reminders will be sent to Authors who have agreed to submit a revised manuscript but have not yet submitted their revision.
	<input checked="" type="radio"/> <b>Reminder Past Revision Due Date:</b> Send an automated reminder e-mail for revisions that are exactly <input type="text" value="7"/> days past the due date. To send reminders for revisions that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who were asked to revise their submission, but have not submitted their revision or decline to revise.
<b>First Assigned Editor:</b>	<input type="text" value="(All Editors)"/>
<b>Editor Who Made First Decision:</b>	<input type="text" value="(All Editors)"/>
<b>Reminder Name:</b>	<a href="#">Insert Special Character</a> <input type="text" value="Author Revision Reminder- EMUG 2017"/> <small>Maximum 200 characters</small>
<b>Reminder Letter:</b>	<input type="text" value="Author Revision First Reminder"/>

You may further refine your result set by selecting all, or choosing one or more values below. 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, the 'Command' key is used while using the mouse to click the desired items.

<b>Article Type:</b>	<input type="text" value="Quick Submission"/> <input type="button" value="Select All"/> <input type="text" value="Original Study"/> <input type="text" value="Editorial"/> <input type="button" value="Clear All"/> <input type="text" value="Review"/>
<b>Section/Category:</b>	<input type="text" value="Invited Editor Section"/> <input type="button" value="Select All"/> <input type="text" value="Clinical Section"/> <input type="text" value="Epidemiology Section"/> <input type="button" value="Clear All"/> <input type="text" value="Conference"/>

# Reviewer Reports

- Three Different Reviewer Reminder Reports
  - Reviewer Invited – No Response
  - Reviewer Reminder
  - Automated Reviewer Reminder

# Automated Reviewer Reminder Report

- Create automated reminders for reviewers. Emails sent once every 24 hours

**Automated Reviewer Reminder Reports**

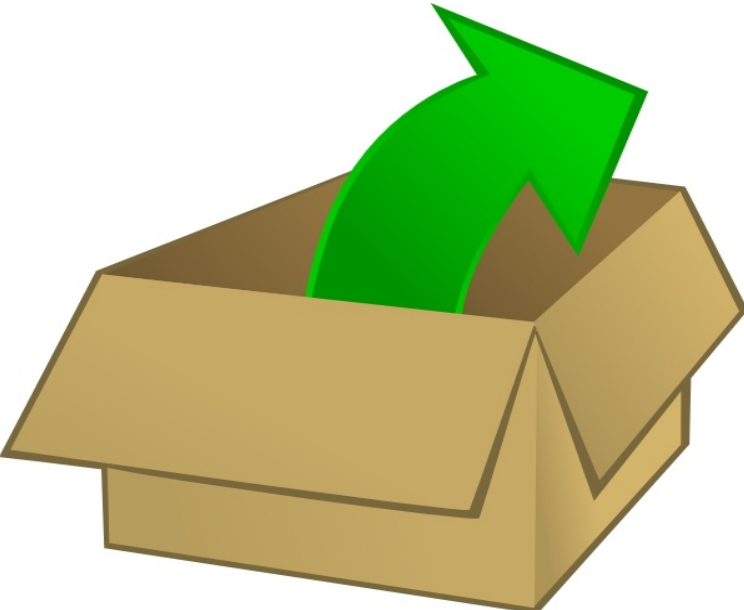
Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the automated reviewer reminder e-mails will be sent once every 24 hours to each recipient.

<b>Reminder Type:</b>	<input type="radio"/> <b>No Response. Send Reminder:</b> Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly <input type="text" value="5"/> days ago. Reminders will be sent to Reviewers who have neither accepted nor declined the review invitation, and have not been un-invited or terminated.
	<input type="radio"/> <b>Reminder Before Due Date:</b> Send an automated reminder e-mail for reviews that are exactly <input type="text" value="10"/> days before their due date. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.
	<input checked="" type="radio"/> <b>Reminder Past Due Date:</b> Send an automated reminder e-mail for reviews that are exactly <input type="text" value="7"/> days past the due date. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.
<b>Reviewer Role:</b>	<input type="text" value="(All Reviewers)"/>
<b>Handling Editor:</b>	<input type="text" value="(All Editors)"/>
<b>Reminder Name:</b>	<a href="#">Insert Special Character</a> <input type="text" value="EMUG 2017"/> <small>Maximum 200 characters</small>
<b>Reminder Letter:</b>	<input type="text" value="Reviewer - First Late Reminder"/>

You may further refine your result set by selecting all, or choosing one or more values below. 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, the 'Command' key is used while using the mouse to click the desired items.

<b>Article Type:</b>	<input type="text" value="Quick Submission"/> <input type="text" value="Original Study"/> <input type="text" value="Editorial"/> <input type="text" value="Review"/>	<a href="#">Select All</a> <a href="#">Clear All</a>
<b>Section/Category:</b>	<input type="text" value="Invited Editor Section"/> <input type="text" value="Clinical Section"/> <input type="text" value="Epidemiology Section"/> <input type="text" value="Conference"/>	<a href="#">Select All</a> <a href="#">Clear All</a>

# Canned Reports



# Options for Canned Reports

- Status Reports
  - Accepted Manuscripts w/o a Publication Date
  - Current Status Report
  - Publishing Pipeline Report
  - Published Table of Contents Report
  - Editor's To-Do List Report
  - Current Role Designations Report
- Invited Author Reports
  - Proposal Pipeline Report
- Manuscript Rating Reports
  - Manuscript Ratings Report
  - Manuscript Ratings by Issue Report
  - Manuscript Ratings Summary Report
- Summary and Annual Reports
  - Classification Index Report
  - Document Classification List Report
  - Reviewer Performance Report
  - Editor Performance Report
  - Journal Accountability Report
  - Manuscript Country/Region of Origin Summary Report
  - Manuscript Country/Region of Origin Detail Report
  - Reviewer Country of Origin Report
  - ISO Standard Country Comparison Report

# Journal Accountability Report

## Submission/Total Revision Statics

### Journal Accountability Report

Summary of activity for the journal office between 01 Jan 2017 and 31 Dec 2017.

This report was run 17 Jan 2018 04:23:02.

[Submission/Revision Statistics](#) [Journal Turnaround Time](#) [Reviewer Statistics](#) [Decision Summary](#) [Correspondence History](#)

#### Submission Statistics

<b>New Manuscripts Received (by First Receipt Date)</b> <i>Bona Fide manuscripts submitted by Authors during the specified time period. This number may include submissions that have been removed by the journal office and manuscripts that have been submitted, but have not yet been assigned to an Editor.</i>	411
<b>New Manuscripts Received (by current Initial Date Submitted)</b> <i>Manuscripts submitted by Authors during the specified time period. This number may change if a submission is returned to the Author and resubmitted by the Author at a later date. In this case, the resubmission date is stored as the Initial Date Submitted, overwriting the original Initial Date Submitted. This number may include submissions that have been removed by the journal office and manuscripts that have been submitted, but have not yet been assigned to an Editor.</i>	411
<b>Submissions Removed by the Journal Office</b> <i>Editorial staff may remove submissions from the system before an Editor is assigned. Manuscripts included in this category are also included in New Manuscripts Received above.</i>	2
<b>Submissions Transferred</b> <i>Manuscripts that were transferred to another publication before an Editor was invited or assigned. Manuscripts included in this category are also included in New Manuscripts Received above.</i>	0
<b>Manuscripts Submitted but not yet Assigned to an Editor</b> <i>Once a manuscript is submitted, the Editor can edit the submission and send it back to the Author for approval. This category includes any submissions being worked on, before any Editors have been assigned. Manuscripts included in this category are also included in New Manuscripts Received above.</i>	0
<b>Manuscripts Returned to the Author and Removed by the Author</b> <i>Once a manuscript is submitted, the Editor can edit the submission and send it back to the Author. The Author can edit the submission, or approve the submission, or remove the submission. This category includes any submissions that the Author has removed (deleted), which means they cannot be resubmitted. Manuscripts included in this category are also included in New Manuscripts Received above.</i>	0
<b>Revisions Requested</b> <i>Journal rendered a Revise decision during the specified time period.</i>	327
<b>Revised Manuscripts Received</b> <i>Author submitted a revision during the specified time period. This figure is independent of the date the original manuscript was submitted, or when the revision was requested.</i>	313

#### Total Revisions Received

This section includes revisions that were received by the journal office during the specified time period. This is not a subset of Revisions Requested in the Submission Statistics. The revision may have been requested at any time, but the counts below reflect revised submissions by the Author during the time period.

	Rev 1	Rev 2	Rev 3	Rev 4	Rev 5
Revisions Submitted by Author	139	100	49	19	6
Revisions Declined by Author	2	0	0	0	0
Average Turnaround Time for Author (days)	43.7	19.4	9.5	9.1	10

# Journal Accountability Report

## Turnaround Time

### Journal Turnaround Time

*This section includes submissions received by the journal office during the specified time period. The statistics are an indication of how long key activities are taking in the process.*

<b>Submission to Technical Check Complete</b> <i>Average number of days between the date the manuscript was received and technical check was completed.</i>	142.5
<b>Technical Check Complete to Editor Assignment</b> <i>Average number of days between the date the technical check was completed and the first Editor was assigned</i>	59.5
<b>Submission to Editor Assignment</b> <i>Average number of days between the date the manuscript was received and the first Editor was assigned.</i>	59.8
<b>Submission to Reviewer Invitation</b> <i>Average number of days between the date the manuscript was received and the first Reviewer was invited.</i>	59.8
<b>Submission to First Decision</b> <i>Average number of days between the date the manuscript was received and the first decision.</i>	0

---



# Journal Accountability Report

## Reviewer Invitation Statistics

### Reviewer Invitation Statistics

*This section provides the breakdown of Total Reviewers Invited to Review during the time period, and the status of each invitation as of the report date.*

<b>Total Reviewers Invited</b> <i>Total number of Reviewers invited during the specified time period. Includes Reviewers who may have been subsequently terminated or un-invited.</i>	1304
<b>Agreed to Review</b> <i>Number of Reviewers invited during the time period who agreed to review and are still working on their reviews.</i>	41
<b>Reviewers who Completed Reviews</b> <i>Number of Reviewers invited during the time period who agreed to review and have completed their review.</i>	725
<b>Declined to Review</b> <i>Number of Reviewers invited during the time period who declined to review.</i>	359
<b>Have not Responded to Review Invitation</b> <i>Number of Reviewers invited during the time period who have neither agreed nor declined to review.</i>	10
<b>Uninvited Reviewers</b> <i>Number of Reviewers invited during the time period who were subsequently un-invited by the Editor.</i>	63
<b>Terminated Reviewers</b> <i>Number of Reviewers invited during the time period whose roles were subsequently terminated by an Editor who chose to make a decision without waiting for the review to be completed.</i>	106

# Journal Accountability Report

## Reviewer Performance Averages

### Reviewer Performance Averages

*This section includes some key statistics about the peer review process. Unless otherwise specified, all calculations are based on reviews completed during the time period.*

<b>Days to Respond to Invitation</b> <i>Average number of days between date Reviewer was invited and date Reviewer agreed or declined to review. Note the Reviewer may have been invited at any time; this calculation includes reviews that were agreed to or declined during the specified time period.</i>	4.4
<b>Days to Complete Review (from Date Invited)</b> <i>Average days between date Reviewer was invited to review and the date the review was completed.</i>	32.9
<b>Days to Complete Review (from Date Agreed to Review)</b> <i>Average days between date Reviewer agreed to the review invitation and the date the review was completed.</i>	29.2
<b>Number of Reviews per Reviewer</b> <i>Average number of reviews completed by each Reviewer during the time period.</i>	1.7
<b>Number of Late Reviews</b> <i>Total number of reviews completed after the due date.</i>	349
<b>Average Days Late</b> <i>For all the Late Reviews specified above, the average number of days those reviews were submitted after the due date.</i>	19
<b>Number of Early Reviews</b> <i>Total number of reviews completed on or before the due date.</i>	425
<b>Average Days Early</b> <i>For all the Early Reviews specified above, the average number of days those reviews were submitted on or before the due date.</i>	7.1

# Journal Accountability Report

## Reviewer Recommendation

### Reviewer Recommendation Summary

*This section shows the total number of Recommendation Terms submitted during the specified time period. The column of percentages is simply an indicator of the frequency with which each Term is used.*

Reviewer Recommendation Term	Reviews Completed	Frequency of Recommendation
(Panel only) D3	1	0.1%
A1 - Unqualified acceptance	68	8.8%
A2 - Invite reaction to comments	45	5.8%
B1 - Modest revision - Final review by Panel only	161	20.8%
B2 - Substantial revision and re-refereeing	201	26%
B3 - Substantial revision - Rewrite as a tech note	63	8.1%
C1 - Unsuitable, may be publishable elsewhere	132	17.1%
C2 - Not suitable for publication	103	13.3%
<b>Total Reviews Completed</b>	<b>774</b>	<b>100%</b>

# Journal Accountability Report

## Decision Summary

### Decision Summary

A separate table is displayed for each Revision Number. Total Decisions is the number of decisions made by the Editor with final decision-making authority for each submission during the specified time period. The Average Time to Decision is the number of days between the date the manuscript was received by the journal office, and the date the final decision was made. For a Revision, the Average Time to Decision is the average number of days between the date the Revision was submitted to the journal office and the date the final decision was made.

Accepted On Submission	Total Submissions
During Submission By Editor	0
After Submission to Publication	0

### Original Submission

Editor Decision Term	Total Decisions	Frequency of Decision	Average Time to Decision
A1 - unqualified acceptance	6	1.5%	63
A2 - invite reaction to comments	2	0.5%	118.5
B1 - modest revision, further review by Panel only	24	6%	101
B2 - substantial revision, resubmit and re-referee	105	26.3%	121.3
B3 - substantial revision, rewrite as tech. note	20	5%	123.3
C1 - unsuitable, may be publishable elsewhere	89	22.3%	128.5
C2 - not suitable for publication	56	14%	140.2
C3 - Rejection on Pre-assessment	94	23.6%	82.8
D2 - Invitation to revise and resubmit	2	0.5%	28.5
D2 - Resubmit - revise English/presentation	1	0.3%	11
<b>Total Editor Decisions</b>	<b>399</b>	<b>100%</b>	<b>113.7</b>

### Revision 1

Editor Decision Term	Total Decisions	Frequency of Decision	Average Time to Decision
A1 - unqualified acceptance	18	13%	59.1
A2 - invite reaction to comments	15	10.9%	48.9
B1 - modest revision, further review by Panel only	30	21.7%	78.2
B2 - substantial revision, resubmit and re-referee	17	12.3%	77.4
B3 - substantial revision, rewrite as tech. note	5	3.6%	57.4
C1 - unsuitable, may be publishable elsewhere	15	10.9%	107.9
C2 - not suitable for publication	5	3.6%	68
Office A1 - Requires correct files to be submitted	33	23.9%	54.7
<b>Total Editor Decisions</b>	<b>138</b>	<b>100%</b>	<b>68.9</b>

### Revision 2

Editor Decision Term	Total Decisions	Frequency of Decision	Average Time to Decision
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# Journal Accountability Report

## Summary of Correspondence History

### Summary of Correspondence History

Summarizes all letters sent during the specified time period.

Letter Purpose	Letters Sent
A1 - Accept	118
A2 - Accept, Optional Revisions	22
Accepted	120
APC Payment Complete	12
APC Payment Due	17
Assessor agrees to take on assignment	432
Assessor Assignment	453
Assessor Assignment - Need new referees	42
Assessor assignment as 2nd Referee	18
Assessor Assignment for SIP 2017	19
Assessor Assignment on A2 revision letter	23
Assessor Assignment on B1 revision letter	53
Assessor Assignment on B2 revision letter	101
Assessor nominated by Chairman	69
Assessor Reminder	101
Assessor Summary Reminder	973
Assigning 2nd Assessor on Pre-assessment Decision	8
Assignment Undone	2
Author declines to revise	2
Author Instructions and Due Date	1
Author Notice Changes Made Or Required	2
Author Notice of Manuscript Number	408
Author Reminder	114
Author Requests Deadline Extension on Revision	35
Author Requests Deadline Extension on Submission	3
Author Revision Final Reminder	15
Author Submits New Child Manuscript Confirmation	1
Author Submits New Paper Confirmation	410
Author Submits Revision Confirmation	313

# Reviewer Performance Report

## Reviewer Performance Report

**Content:** Summary of Reviewer activity for all submissions received by the journal office during the selected time period. Detailed performance statistics are provided for each Reviewer, along with a link to more detailed information about each Reviewer.

Please choose a time period. You may further refine your criteria by choosing the options below.

Choose Fixed Date Range:

All Dates ▼

Enter Customized Date Range (mm/dd/yyyy):

Start Date: 01/01/1999

End Date: 12/31/2017

You may further refine your result set by selecting all, or choosing one or more values below. 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.

Reviewer Role:  [Select All](#)  
 [Clear All](#)

Article Type:  [Select All](#)  
 [Clear All](#)  
 [Clear All](#)  
 [Clear All](#)

Section/Category:  [Select All](#)  
 [Clear All](#)  
 [Clear All](#)  
 [Clear All](#)

- List Board Members first
- Include Reviewer and Manuscript Ratings in result set
- Create Extraction file for download
  - Include Reviewer's Classifications in download file
  - Include Reviewer's Keywords in download file
- Include Inactivated Users
- Display All Reviewers in the system (even if they were not invited to review any submissions received by the journal in the specified time period)

Cancel

Submit



# General Data Export





# General Data Export

- Allows you to extract raw data from the EM database
- Select an individual database table to output
- Useful tables- Admin Audit Trail, Letter Inventory, Document Table

# General Data Export

## Letter Inventory

**Table:** Letter Inventory

**Description:** Complete inventory of all letters in the system, setup by the journal in PolicyManager. The journal then defines which letters are sent to each User Role in ActionManager.

Fields:		
	Letter Purpose	<a href="#">Details</a>
	Letter File Name	<a href="#">Details</a>
	Letter Subject	<a href="#">Details</a>
	Unique Letter ID	<a href="#">Details</a>
	From Editor	<a href="#">Details</a>
	Letter Format	<a href="#">Details</a>
	Rich Text (HTML) Letter Template	<a href="#">Details</a>
	Text Letter	<a href="#">Details</a>
	Letter Custom Instructions	<a href="#">Details</a>
	Display CC List TextBox	<a href="#">Details</a>
	Display CC Editors Checkbox	<a href="#">Details</a>
	Display CC Reviewers Checkbox	<a href="#">Details</a>
	Display CC Co-Authors Checkbox	<a href="#">Details</a>
	Letter Family ID	<a href="#">Details</a>

# General Data Export

## Admin Audit Trail

Unique ID	Operator ID	Proxy Operator ID	IP Address	GMT Timestamp	ASP Page Name	SQL Command	Other Text	Last modified DateTime
16749	1		89.204.137.14	11/12/2015 06:53:33	ArticleTypeManager.cs	Command: dbo.usp_UpdateArticleType @id: 36 @regionOfOriginPrefID: 0 @regionOfOriginRevSubPrefID: 0 @articleType: Special Article @rank: 8 @hidden: False @invited: False @articleTypeFamilyID: 1 @limitClassifications: 3 @limitMinimumClassifications: @limitKeywords: 5 @daysToReview: 14 @minNumberReviewsRequired: 2 @reviewerDaysToRespond: 7 @daysToReviewRevision: 7 @daysToReviseFirstRevision: 14 @daysToReviseSubseqRevision: 7 @classPrefsNew: 0 @classPrefsRevised: 0 @keywordPrefsNew: 0 @keywordPrefsRevised: 0 @secKeywordPrefsNew: 2 @secKeywordPrefsRevised: 2 @commentPrefsNew: 0 @commentPrefsRevised: 0 @requestedEditorPrefsNew: 0 @requestedEditorPrefsRevised: 0 @abstractPrefsNew: 0 @abstractPrefsRevised: 0 @sectionPrefsNew: 0 @sectionPrefsRevised: 0 @useMSRatings: False @allowFileUploads: True @additionalInfoPrefsNewSub: 1 @additionalInfoPrefsRevSub: 1 @shortTitlePrefsNew: 0 @shortTitlePrefsRevised: 0 @fullTitleLimitWordsOrChars: False @fullTitleLimit: 6 @shortTitleLimitWordsOrChars: False @shortTitleLimit: 3 @abstractLimitWordsOrChars: False @abstractLimit: @commentsLimitWordsOrChars: False @commentsLimit: 150 @limitAuthors: @suggestMinNumberOfReviewers: 0 @suggestReviewersPrefsNew: 1 @suggestReviewersPrefsRevised: 1 @opposeReviewersPrefsNew: 1 @opposeReviewersPrefsRevised: 1 @respondToReviewersPrefsNew: 2 @respondToReviewersPrefsRevised: 1 @autoPromoteAlternateReviewers: 1 @autoUninviteAuthors: False @autoPromoteAlternateAuthors: False @questionnaireIDNew: 16 @questionnaireIDRev: 16 @targetPubDateRequired: False @authorNumDaysToRespond: 0 @authorSubDueDays: 0 @authorSubDueDateType: NumDaysPriorToSubmission @workflowID: 1 @chargeSubmissionFee: True @submissionFeeID: 3 @authorVerificationSetting: 3 @secondaryTitlePrefsNew: 2 @secondaryTitlePrefsRev: 2 @secondaryShortTitlePrefsNew: 2 @secondaryShortTitlePrefsRev: 2 @secondaryAbstractPrefsNew: 2 @secondaryAbstractPrefsRev: 2 @editorAuthorCoverpageLayoutId: 12 @reviewerCoverpageLayoutId: 15 @AutoUnAssignReviewerNumberOfDays: 14 @AutoUnAssignReviewersWithReviewInProgress: False @SimilaritySendPdfInitialSubmit: True @SimilaritySendPdfFirstRevisionSubmit: False @SimilaritySendPdfFinalDispAccept: False @CheckForDuplicateSubmissions: True @ApplyApc: 2 @editorUseOnly: False @authorQuestionnaireIDNew: @authorQuestionnaireIDRev: @showCoAuthorQuestionnaire: False @autoAcceptFD: False @autoRejectFD: True @autoAcceptFDDecisions: @autoRejectFDDecisions: 4 @fundingInformationNew: 2 @fundingInformationRevised: 2 @corrAuthorOrcidRequest: 0 @coAuthorOrcidRequest: 0 @editorTemplateChainTemplateId:	Updating article type.	11/12/2015 01:53:33
16750	1		89.204.137.14	11/12/2015 06:53:34	ArticleTypeManager.cs	Command: dbo.usp_UpdateArticleFileType @articleTypeID: 36 @fileTypeID: 4 @required: Hidden @requiredForRev: Hidden @allowOfflineSubNew: Optional @allowOfflineSubRev: Optional @forReviewer: False @forPublisher: False @includeInWebFirst: False	Updating item type requirements for article. RequiredForNewSubmission=Hidden RequiredForRevision=Hidden AllowOfflineSubmissionNew=Optional AllowOfflineSubmissionRevision=Optional ForReviewer=False ForPublisher=False IncludeInWebFirst=False	11/12/2015 01:53:33

# Custom Reports



# Custom Reports

- Enables users to extract data from the EM database easily
- Allows you to create your own report templates that can be saved and run whenever needed
- Can be exported for file manipulation outside of EM

# Custom Reports View

- Author Information
- Authors & Personal Identifiers
- Authors & Submissions (Note: this gives multiple records per submission; one per revision)
- Editors & Submissions
- Manuscript and Keywords
- Manuscript Status History (View gives one result per paper)
- Manuscripts & Classifications
- Merge Duplicate User Audit Trail
- People & Address (Note: People with Alternate Addresses will appear twice in the results)
- People & Classifications
- People & Keywords
- People & Personal Identifiers
- Production Task Questionnaire View
- Review Questions and Responses
- Reviewers & Submissions
- Schedule Group Production Tasks (Production Tracking users only)
- Schedule Groups Table of Contents and Headers (Production Tracking users only)
- Schedule Groups (Production Tracking users only)
- Submission Flag History View
- Submission Production Tasks (Production Tracking users only)
- Submission Production (Production Tracking users only)
- Submissions & All Authors Questionnaires
- Submissions & Author Questionnaires
- Submissions & Funding Information View
- Transferred Reviews View

# Custom Reports Example

Manuscripts by Final Decision - select view

## Create Custom Report

Choose a view.

Table:

[Get more help](#) about Editorial Manager database Views and their contents.

[Back to Reports](#)  
[Back to Main Menu](#)

# Custom Reports Example

## Manuscripts by Final Decision - select fields

**Custom Report - Manuscript Status History View**

Select the fields to include in the report.

[Check All](#)   [Clear All](#)

- Article Title
- Short Title
- Article Type
- Initial Date Submitted
- Revision
- First Receipt Date
- DOI
- Technical Check Completion Date
- Editorial Status
- Editorial Status Date
- Edit Submission Status Term
- Edit Submission Status Date
- First Name of the Editor who made First Decision
- Last Name of the Editor who made First Decision
- First Name of the Editor who made Final Decision
- Last Name of the Editor who made Final Decision
- Final Disposition Term
- Date Final Disposition Set
- Days to Final Disposition
- Manuscript Number



# Custom Reports Example

Manuscripts by Final Decision - select search criteria

**Custom Report - Manuscript Status History View**

Choose the criteria for selecting Manuscript Status History View Records:

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

Criterion	Selector	Value
Initial Date Submitted	GREATER THAN OR EQUAL TO	01/01/2015
Article Title	CONTAINS	
Article Title	CONTAINS	
Article Title	CONTAINS	
Article Title	CONTAINS	

First ORDER BY Article Type in ASCENDING order.

Then ORDER BY Article Type in ASCENDING order.

Show results onscreen

Create extraction data file for download

Show summary only

Download extraction data file only

# Custom Reports Example

## Manuscripts by Final Decision – search results displayed

<a href="#">Download the Data File</a>			
<a href="#">Download the data file in Unicode format - UTF-8</a>			
Page: 1 of 1 (107 total records searched)		Display <input type="text" value="500"/> results per page.	
Article Type	Final Disposition Term	Manuscript Number	Final Decision Term
Manuscript	Reject	JPRS38	Reject
Research Article	Accept	BLTRIAL-D-02-00016	Accept final
Research Article	Accept	BLTRIAL-D-02-00020	Accept final
Research Article	Accept	BLTRIAL-D-02-00024	Accept final
Manuscript	Accept	JPRS82	Accept final
Manuscript	Accept	JPRS92	Accept final
Research Article		BLTRIAL-D-02-00030	Accept final
Research Article	Accept	BLTRIAL-D-03-00003	Accept final
Research Article	Reject	BLTRIAL-D-03-00015	Reject
Research Article	Accept	BLTRIAL-D-03-00018	Accept final
Research Article	Accept	BLTRIAL-D-03-00037	Accept final
Invited paper	Accept	BLTRIAL-D-04-00025	Accept final
Research Article		BLTRIAL-D-04-00007	Accept final
Research Article	Accept	BLTRIAL-D-04-00055	Reject
Research Article	Accept	BLTRIAL-D-05-00019	Accept final

Last But Not Least...

~~LEAST~~

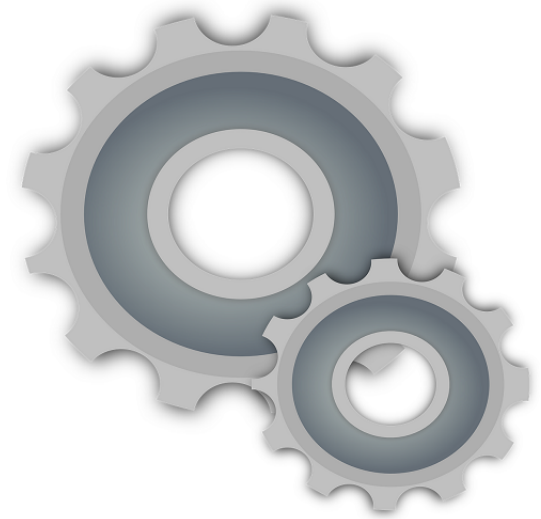
# Enterprise Analytics Reporting- EAR

- An instructional video on EAR can be found on the Aries Resources webpage
  - <http://www.ariessys.com/views-and-press/resources/video-library/ear-video/>



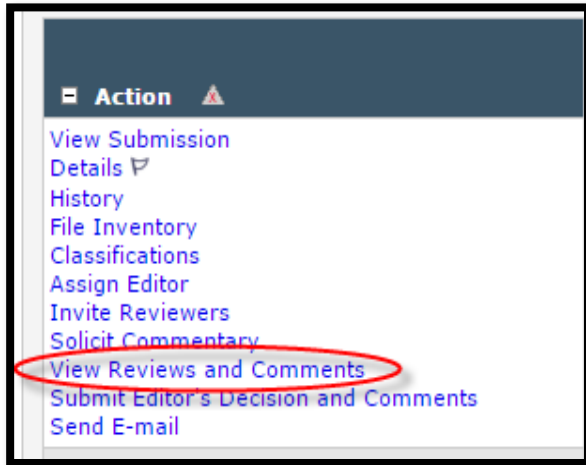
The screenshot displays the Aries Systems website interface. At the top left is the Aries Systems logo. The navigation menu includes: HOME, JOURNALS LIST, SOLUTIONS, VIDEOS, EVENTS, VIEWS & PRESS, and ABOUT. In the top right corner, there are links for Request a Demo, Contact, and Careers. The main heading reads "Enterprise Analytics Reporting". Below this heading is a video player showing a video titled "Enterprise Analytics Reporting" with a blue circular logo containing the letters "em". The video player includes a play button, a progress bar, and a "12:28" duration indicator. To the right of the video player is a "VIEWS & PRESS" section with four menu items: News & Opinion, Press Releases, FAQ, and Resources, each with a right-pointing arrow.

# Widgets



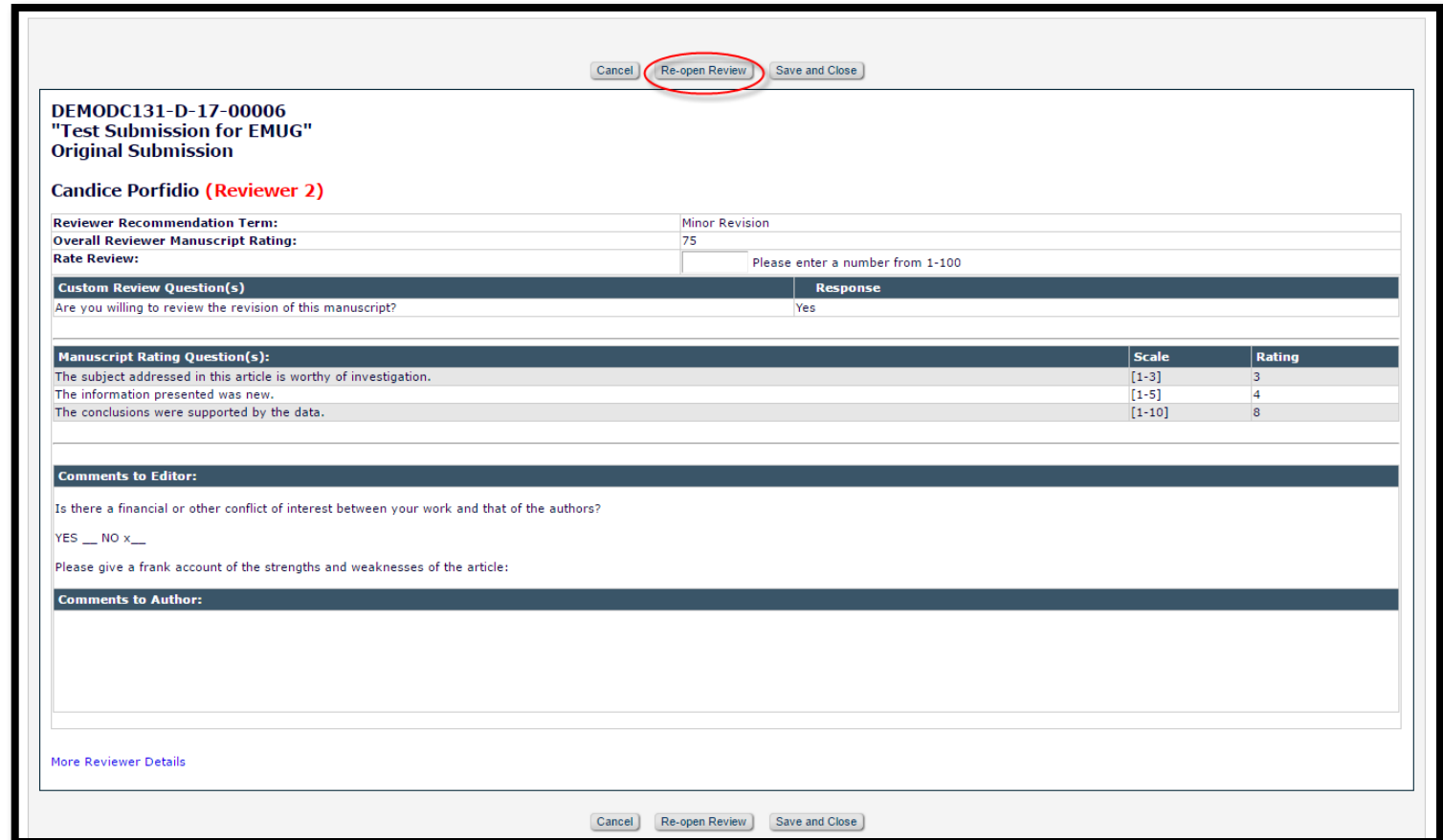
# Re-Opening Reviews

- An Editor may wish to send back a review to a Reviewer (re-open) for additional information, potential editing of the review, or editing an attachment



**Action**

- View Submission
- Details ▾
- History
- File Inventory
- Classifications
- Assign Editor
- Invite Reviewers
- Solicit Commentary
- View Reviews and Comments**
- Submit Editor's Decision and Comments
- Send E-mail



DEMOC131-D-17-00006  
"Test Submission for EMUG"  
Original Submission

**Candice Porfidio (Reviewer 2)**

Reviewer Recommendation Term: Minor Revision  
Overall Reviewer Manuscript Rating: 75  
Rate Review:  Please enter a number from 1-100

Custom Review Question(s)	Response
Are you willing to review the revision of this manuscript?	Yes

Manuscript Rating Question(s):	Scale	Rating
The subject addressed in this article is worthy of investigation.	[1-3]	3
The information presented was new.	[1-5]	4
The conclusions were supported by the data.	[1-10]	8

**Comments to Editor:**

Is there a financial or other conflict of interest between your work and that of the authors?  
YES \_\_\_ NO x\_\_

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

**Comments to Author:**

[More Reviewer Details](#)

# Re-Opening Reviews

- After the editor confirms that he/she does want to re-open the review, they are brought to a page where they can customize a letter to be sent to the reviewer notifying them that that the review is being re-opened

**Re-open Review and Customize Letters**

You have chosen to re-open the review for the Reviewer listed below. [\(more...\)](#)

**Reviewer**

Name	Letter		Do Not Send Letter
<a href="#">Candice Porfidio (Reviewer)</a>	Reviewer Assignment for Re-opened Review ▼	<a href="#">Customize</a>	<input type="checkbox"/>

# Re-Opening Reviews - Configuration

- Go to System Administrator Functions – Role Manager - Edit the desired role - Reviewer Invitations

**Reviewer Invitations**

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



# Additional People Details

- In the People Record – Additional People Details can be configured by the publication to collect more information about the user

**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

Re-type Password \*

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 - Alex Porfidio

[Cancel](#) [Save and Close](#)

Maiden Name	<input type="text" value="Smith"/>	
Gender	<input type="text" value="Female"/>	

[Cancel](#) [Save and Close](#)

# Additional People Details

- The publication can also configure the Additional People Detail fields to appear on the Transmittal Form

Title		<a href="#">Help</a>
First Name	Alex	<a href="#">Help</a>
Middle Name		<a href="#">Help</a>
Last Name	Porfidio	<a href="#">Help</a>
Degree		<a href="#">Help</a>
Primary Phone Number		<a href="#">Help</a>
Fax Number		<a href="#">Help</a>
E-mail Address	cporfidio@trash.com	<a href="#">Help</a>
Position		<a href="#">Help</a>
Department		<a href="#">Help</a>
Institution		<a href="#">Help</a>
Address Line 1		<a href="#">Help</a>
Address Line 2		<a href="#">Help</a>
Address Line 3		<a href="#">Help</a>
Address Line 4		<a href="#">Help</a>
City		<a href="#">Help</a>
State		<a href="#">Help</a>
Zip		<a href="#">Help</a>
Country	UNITED STATES	<a href="#">Help</a>
Notes to Production		<a href="#">Help</a>
Schedule Group Description		<a href="#">Help</a>
Submission Target Online Publication Date		<a href="#">Help</a>
Production Notes	<a href="#">Insert Special Character</a>	<a href="#">Help</a>
Please confirm you have approval from all Co-authors to submit this manuscript?	Yes	
Please confirm you have approval from all Co-authors to submit this manuscript?		
If you have submitted this manuscript to another publication please give details below		
Please enter the date you submitted the paper to another publication.		
Please enter the <b>Word Count</b> of your manuscript	3600	
Preprint DOI		<a href="#">Help</a>
Maiden Name	Smith	
Gender	Female	

A journal can insert any specific instructions for the person filling out the Transmittal Form, or for someone receiving the printed Transmittal Form. Such instructions can be inserted here. Additional instructions can be inserted at the top of this form.

# Additional People Details – Configuration

- Go to System Administrator Functions – PolicyManager - Additional Data Policies

**Additional Data Policies**

- [Add/Edit Additional People Detail Fields](#)
- [Add/Edit Additional Manuscript Detail Fields](#)
- [Edit Additional Invitation 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.

Order	Description	Actions
<input type="text" value="1"/>	Maiden Name	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="2"/>	Gender	<a href="#">Remove</a> <a href="#">Edit</a>

[Back to PolicyManager](#)

# Additional People Details – Configuration

## Edit Additional People Detail Field

### Field Description:

[Insert Special Character](#)

Maiden Name

*Maximum 256 characters*

### Field Type:

Text ▼

### Maximum Field Length:

40

*(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](#)

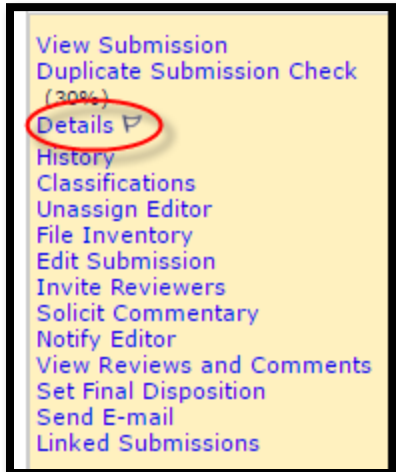
### Options

Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional People Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

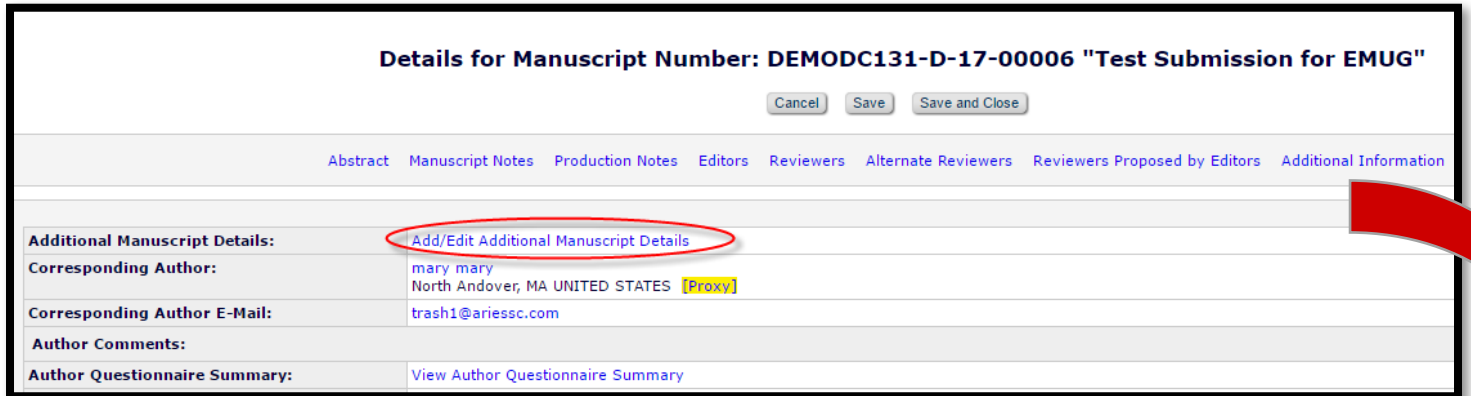
Page	Hide	Editable	Required	Help Text
Additional People Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input type="text"/>
People Activity Details	<input type="checkbox"/>	N/A	N/A	<input type="text"/>
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>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

# Additional Manuscript Details

- Additional Manuscript Details allows your journal to store additional information about the submission



- View Submission
- Duplicate Submission Check (30%)
- Details ▾**
- History
- Classifications
- Unassign Editor
- File Inventory
- Edit Submission
- Invite Reviewers
- Solicit Commentary
- Notify Editor
- View Reviews and Comments
- Set Final Disposition
- Send E-mail
- Linked Submissions

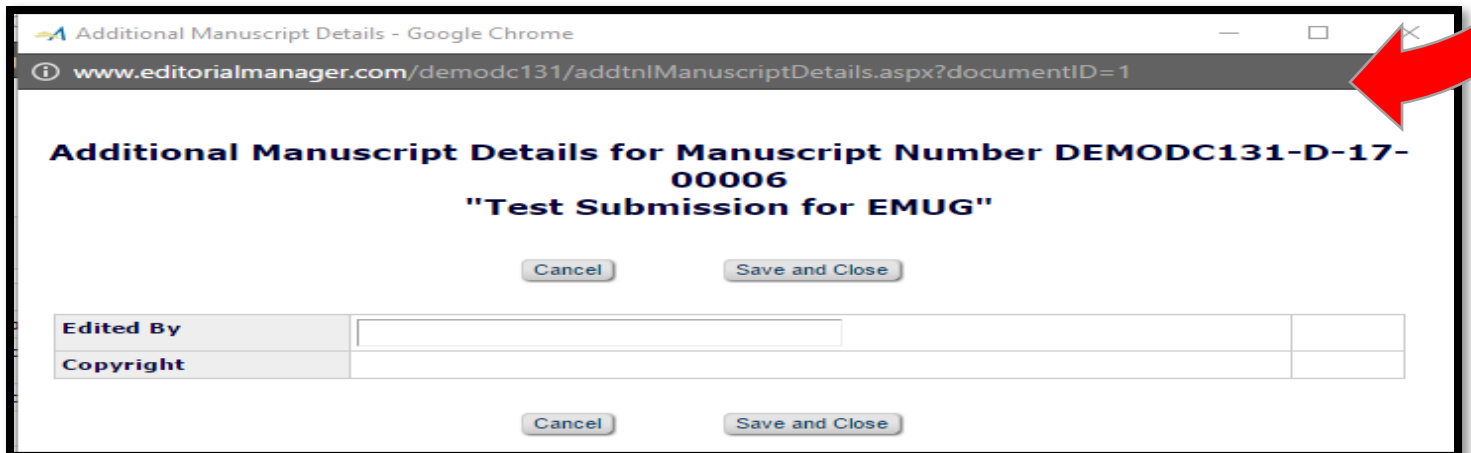


**Details for Manuscript Number: DEMODC131-D-17-00006 "Test Submission for EMUG"**

Cancel Save Save and Close

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

<b>Additional Manuscript Details:</b>	<a href="#">Add/Edit Additional Manuscript Details</a>
<b>Corresponding Author:</b>	mary mary North Andover, MA UNITED STATES [Proxy]
<b>Corresponding Author E-Mail:</b>	trash1@ariessc.com
<b>Author Comments:</b>	
<b>Author Questionnaire Summary:</b>	<a href="#">View Author Questionnaire Summary</a>



Additional Manuscript Details - Google Chrome

www.editorialmanager.com/demodc131/addtnlManuscriptDetails.aspx?documentID=1

**Additional Manuscript Details for Manuscript Number DEMODC131-D-17-00006 "Test Submission for EMUG"**

Cancel Save and Close

<b>Edited By</b>	<input type="text"/>	
<b>Copyright</b>	<input type="text"/>	

Cancel Save and Close

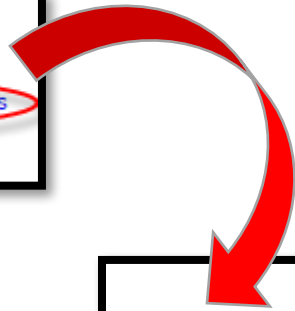


# Additional Manuscript Details – Configuration

- Go to System Administrator Functions – Policy Manager - Additional Data Policies

☐ **Additional Data Policies**

- [Add/Edit Additional People Detail Fields](#)
- [Add/Edit Additional Manuscript Detail Fields](#)
- [Edit Additional Invitation 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.

Order	Description	Associated with Flag	Actions	
<input type="text" value="1"/>	Edited By		<a href="#">Remove</a>	<a href="#">Edit</a>
<input type="text" value="2"/>	Copyright		<a href="#">Remove</a>	<a href="#">Edit</a>

# Additional Manuscript Details – Configuration

### Add Additional Manuscript Detail Field

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

**Field Type:** ▶  
 Please Choose  
 Please Choose  
**Text**  
 Date  
 Integer  
 Decimal  
 Notes  
 List

**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

[Select](#) 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.  
 [All](#)  
 [Clear](#)  
 [All](#)

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

# Custom Flags



- Custom Flags are displayed in key places throughout the system, giving authorized Editor and Publisher users immediate and clear visibility to noteworthy traits of a submission or person
- And, Custom Flags are searchable!



# Custom Flags – For Submissions

em Editorial Manager™

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

Go to: -- Search Page --  
Role: Managing Editor Username: mary



English

**Important Message: Site under development. Do not use for live manuscript submission.**

Quicklinks

Search Submissions - Search Results  
Submission Flag Name is equal to 'Technical Check Passed'

Page: 1 of 1 (2 total submissions) 1 10 results

Action	Manuscript Number	Article Type	Article Title	Short Title	Keywords	Classification	Current Status	Status Date	Initial Date Submitted	Author Name	Reviewers	Review Status	Handling Editor	Assigned Editors	Section Category
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (0%)</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="#">View Reviews and Comments</a> <a href="#">Rescind Decision</a> <a href="#">Unassign Editor</a> <a href="#">Notify Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Set Final Disposition</a> <a href="#">Project MUSE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOJES131-D-17-00001	Original Study	31014 Test				Decision in Process	Mar 24, 2017	Mar 24, 2017	mary mary			Edward Editor	Edward Editor Elaine Editor	
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (30%)</a> <a href="#">Details</a>  <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Information</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="#">Project MUSE</a>	DEMOJES131-D-17-00002	Original Study	Level 1 - Part 2 Training (#1)			20.400: Chickpeas 10.200: Kidney Beans 10.400: Lima Beans	Under Review	Mar 27, 2017	Mar 27, 2017	Arthur Author			Edward Editor	Edward Editor	

- Practical examples of how a Submission Flag might be used:
  - When a submission is ready for an Editor's decision
  - If a submission is worthy of Press Release
  - If Technical Check has passed

# Custom Flags – For People

The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with links like HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. The user is logged in as 'mary' with the role of 'Managing Editor'. A red banner at the top states: 'Important Message: Site under development. Do not use for live manuscript submission.'

The main content area is titled 'Search People - Search Results'. It includes a search criteria form with columns for Criterion, Selector, Value, and User Role. Below the form, there is a table of search results. The table has columns for Merge People, Name, City, State or Province, Country, Author Role, Reviewer Role, Editor Role, and Publisher Role. The first row shows 'mary mary' with a phone icon flag. The second row shows 'Elaine Editor' with a sad face flag. The third row shows 'Edward Editor' with a sad face flag. A red arrow points to the phone icon flag on the first row.

Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input type="checkbox"/>	mary mary	over	MA	UNITED STATES	[Author]		[Managing Editor]	[Publisher]
<input type="checkbox"/>	Elaine Editor			UNITED STATES	[Author]		[Editor]	
<input type="checkbox"/>	Edward Editor			UNITED STATES	[Author]		[Editor]	

- Practical examples of how a People Flag might be used:
  - To indicate that a particular Editor prefers to be contacted by phone
  - To highlight exceptional/poor Reviewers
  - To denote an Editor who has a “full plate” of assignments

# Custom Flags – Configuration

To configure:

1. Go to PolicyManager
2. General Policies
3. Create Custom Submission/People Flags
4. Click the 'Add' button to create a new flag

The screenshot displays the Editorial Manager web interface. The top navigation bar includes the 'em Editorial Manager' logo and a user profile section showing 'Role: Managing Editor' and 'Username: mary'. Below the logo, a breadcrumb trail contains 'ROLEMANAGER', 'ACTIONMANAGER', 'POLICYMANAGER', 'ADMINMANAGER', and 'ADMINISTRATION HELP'. The 'POLICYMANAGER' link is circled in red. A dropdown menu is open under 'POLICYMANAGER', with 'General Policies' selected and circled in red. A list of configuration options is displayed, with 'Create Customized Submission Flags' and 'Create Customized People Flags' circled in red. A red line connects the 'General Policies' dropdown to the circled options.

em Editorial Manager™

em Editorial Manager™

Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • **POLICYMANAGER** • ADMINMANAGER • ADMINISTRATION HELP

**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
- Define Details Page Layouts
- Set Update Information Deep Link Expiration
- Create Customized Submission Flags**
- Create Customized People Flags**
- Edit Instructions for Archived Files
- Edit Production Notes Instructions
- Edit Alternate Contact Notes Instructions
- Customize Author Main Menu Instructions
- Configure Personal Classification Rankings
- Customize Reviewer Selection Summary Instructions
- Enable Institution Name Normalization

# Watermarks

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam mi ex, elementum et ex non, aliquam consequat dui. Quisque non erat in ipsum sagittis fringilla. Aenean ut iaculis libero. Vestibulum eget ultrices justo, vel varius lacus. Nulla velit arcu, auctor et purus in, ullamcorper tincidunt lacus. Curabitur non eros non purus feugiat fringilla in nec ipsum. Nunc ac sagittis ipsum, ac ullamcorper odio.

Nunc tellus odio, molestie in lacinia nec, bibendum ac lacus. Cras pretium nisi at ante ultricies, sed finibus nulla dignissim. Vestibulum eu sapien a risus tincidunt mattis. Duis convallis ligula a augue dignissim, eget pharetra turpis tempor. Suspendisse potenti. Pellentesque iaculis vestibulum nisi nec maximus. Duis eget vehicula justo. Sed imperdiet, tortor molestie placerat tristique, elit nibh malesuada mauris, quis condimentum ipsum elit sit amet tellus.

Proin in rhoncus arcu. Integer aliquam nulla non orci ornare, volutpat tristique enim ullamcorper. Fusce sed ligula quis lectus viverra gravida in eget lorem. Nulla tempus, odio ultricies pellentesque vehicula, mauris purus placerat mi, sed dignissim felis massa scelerisque neque. Praesent non nibh euismod, tincidunt metus ut, luctus neque. Cras finibus aliquet velit nec congue. Integer ut iaculis diam.

Suspendisse nulla neque, tincidunt eu nulla tristique, elementum venenatis lorem. Donec libero arcu, venenatis nec purus placerat, malesuada ultricies diam. Nunc feugiat turpis eu blandit accumsan.

Vivamus sit amet efficitur augue. Fusce consectetur porta enim, ut porta lacus aliquam et. Etiam dignissim pretium libero, non lacinia risus finibus in. Proin purus ante, mollis sit amet bibendum in, interdum sit amet sem. Aliquam consectetur egestas erat eu sagittis. Vestibulum elementum mauris eget dapibus porttitor. Pellentesque faucibus lobortis tellus, faucibus pretium libero ullamcorper pharetra. Nunc at scelerisque libero. Sed varius eu mi quis euismod. Phasellus in dui maximus augue tristique dignissim. Nulla volutpat neque est, ut finibus sem aliquet et. Proin quis libero in tortor molestie egestas at nec neque. Sed faucibus vel ipsum nec auctor.

- Administrators can add “watermark” graphics to the PDFs that are newly-built EM
- This feature is great for publications that wish to brand their PDFs with logos and messages
- Discourages illegal sharing

# Watermarks – Configuration

**em Editorial Manager™**  
Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • **POLICYMANAGER** • ADMINMANAGER • ADMINISTRATION HELP

## Configure PDF Watermarks

To use watermarks on your PDFs, select the image you wish to use and drag it into place on the page. Once you have done so, you may resize the image relative to the page using the drag handle. You may also adjust the desired transparency.

[FAQ](#)

**CONFIDENTIAL** **REVIEWER PDF** **DO NOT DISTRIBUTE** [Image] [Image] [Image] [Image] [Image] [Image] [Image] [Image] [Image] **Upload Image**

**Author/Editor PDF** **Reviewer PDF**

Cover page

Transparency: [Slider] **Preview**

**Cancel** **Save & Close**

To Configure:

1. Go to the “Configure PDF Watermarks” page in PolicyManager, located in the “Submission Policies” section
2. Once in the ‘Configure PDF Watermarks’ interface, you can:
  - Upload custom images (up to 9 images, 3 “stock” images available)
  - Drag and drop images from the gallery onto sample PDF
  - Experiment with transparency
  - Preview the full-size results
3. Save your new PDF watermark to use this feature for all newly-built PDFs

# Auto-Set Final Disposition (Reject)

- As many publications often have a higher incidence of “Reject” decisions, they will configure Final Disposition to automatically be set upon their final decision. This:
  - Saves time
  - Can be set per Article Type
  - Keeps manuscripts tidy

**Submissions with Decisions**

Submissions out for Revision (0)  
All Submissions with Editor's Decision (2)  
All Submissions with Final Disposition:  
Accept (6), Reject (0), Withdrawn (1)  
My Assignments with Decision (0)  
My Assignments with Final Disposition (0)



**Submissions with Decisions**

Submissions out for Revision (0)  
All Submissions with Editor's Decision (1)  
All Submissions with Final Disposition:  
Accept (6), Reject (1), Withdrawn (1)  
My Assignments with Decision (0)  
My Assignments with Final Disposition (0)



em Editorial Manager™

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

Go to: -- Search Page --  
Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

Quicklinks

**All Submissions with Editor's Decision - mary mary**  
Contents: All submissions for which an Editor has submitted a decision.

Page: 1 of 1 (2 total submissions) 1

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Name	Editor Decision
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Set Final Disposition</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a> <a href="#">Rescind Decision</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOJES130-D-17-00014R1	Original Study		Level 1, Part 2 Training (#5)	mary mary	Mar 23, 2017	Mar 23, 2017	Accept	Carol Snapke	Accept
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Assign Editor</a> <a href="#">Notify Author</a> <a href="#">Set Final Disposition</a> <a href="#">View Reviews and Comments</a> <a href="#">Rescind Decision</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOJES130-D-17-00004	Original Study	Basic Science Section	PLOS Test 1	mary mary	Jan 25, 2017	Feb 03, 2017	Decision in Process	Thomas Snapke	Reject

**Notify Author Confirmation**

The Author Notification Letter 'Your Submission' has been e-mailed to:  
mary mary trash1@ariessc.com

The Final Disposition has been set to 'Reject' by the system.

You may reactivate a submission following a Final Disposition of 'Reject' or 'Withdrawn' by using the 'Initiate Rebuttal' Action.



# Auto-Set Final Disposition (Reject) – Configuration

The image shows a sequence of three screenshots from the Editorial Manager administration interface. The first screenshot shows the left-hand navigation menu with 'System Administrator Functions' circled in red. A red arrow points from this menu item to the second screenshot, which shows the 'PolicyManager' section with 'Edit Article Types' circled in red. A second red arrow points from 'Edit Article Types' to the third screenshot, which shows the 'Edit Article Types' configuration page. In this page, the 'Editor/Publish' column for the 'Original Study' article type has 'Remove', 'Edit', and 'Copy' links, with 'Edit' circled in red. A third red arrow points from the 'Edit' link back to the 'System Administrator Functions' menu item in the first screenshot.

## To Configure:

1. System Admin. Functions
2. PolicyManager
3. Edit Article Types
4. Select Article Type, then “Edit”

This screenshot shows the 'Field Size Limitations' configuration page. The 'Final Disposition' section is circled in red, showing a checked checkbox and a dropdown menu set to 'Reject'. Below this, the 'Submission Item Parameters' section is visible, with 'Author Agreement' parameters for 'New Submission' and 'Revised Submission'.

Author Agreement	New Submission	Revised Submission
Required for Submission:	Optional ▼	Hidden ▼
Allow Offline Submission:	Optional ▼	Hidden ▼



# Automatically Withdrawal Declined Revisions

## Editor Decision Policies

[Edit Editor Decision Terms](#)

[Configure Editor Decision Phrases](#)

[Create Editor Forms](#)

[Configure Editor Forms](#)

[Editor Manuscript Rating Question Configuration](#)

[Configure Options for Review Rating](#)

[Configure Automatic Withdrawal of Declined Revisions](#)

## Configure Automatic Withdrawal of Declined Revisions

Use the option below to automatically set the Final Disposition to 'Withdrawn' one or more days after the Author declines to revise the submission. When this feature is enabled, the Final Disposition is automatically set to 'Withdrawn' during the nightly batch process the specified number of days after the Author declines to revise. If there is a very large number of submissions to be withdrawn in a single batch cycle, the process may be spread over two or more batch cycles to ensure optimal performance. If this option is not enabled, submissions remain in the Editor's 'Submissions Out for Revision' folder until the final disposition is manually set to Withdrawn.

Note: If the Editor rescinds the decision or the Author reinstates the submission (after declining to revise), the Final Disposition will not automatically be set to Withdrawn.

Automatically set the Final Disposition to Withdrawn  days after the Author declines to revise

Cancel

Submit

## Author Revision

Event	Journals Editor Letters
Author Declines to Revise	Journal Office Notice Author Declines to Revise
Revision Due Date Changed	NONE
Reinstate Declined Revisions	Journal Office Notice Declined Revision Reinstated



# Help

A screenshot of the Editorial Manager Help System page. The page features a blue header with the 'em' logo and the text 'Editorial Manager' in large black font, with 'Help System' in white text on a blue background below it. The main content area includes a section titled 'What's new in version 14.0?' with links to 'Release Notes!', 'Release Digest!', and 'Video Library!'. At the bottom, there is a link for 'Minimum System Requirements' and a copyright notice for Aries Systems Corporation from 2017.

em Editorial Manager<sup>®</sup>  
Help System

**What's new in version 14.0?**  
Complete feature details can be found in the [Release Notes!](#)  
Short on time? Try the [Release Digest!](#)  
Browse additional resources on our [Video Library!](#)

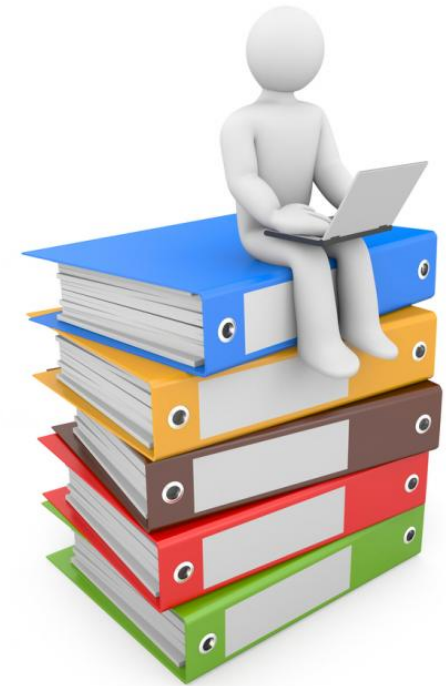
[Minimum System Requirements](#)

Aries Systems Corporation - Copyright © 2017 - All Rights reserved

“Help” can be found by clicking the link in the banner of your EM site:

- Very useful tool—customers use it all the time!
- “Help” was updated in the Version 13.1 release
  - More reactive search
  - Auto-complete feature
  - Tracks searches and becomes “smarter” over time
  - Updated interface
  - Feedback welcome!

# Editorial Office – Managing Your People Records



# People Records

## 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.

### Doctor Worm

Proxy-Registered:  
07.01.2014  
(Data Unconfirmed by User)

Last Modified:  
26.05.2015

[Inactivate this User](#)

[Send Login Details](#)

\*\*The user will be sent an email with a link to reset their password. The password will not reset until the user clicks that link.

- Exclude this user from receiving all batch and reminder emails:
- Always
  - When Unavailable Dates are active

### User Information

[Open Special Character Palette](#)

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](#)

### Personal Information

Title  (Mr., Mrs., Dr., etc.)

Given/First Name \*

Secondary Given/First Name

Middle Name

Family/Last Name \*

Secondary Family/Last Name

Name

Degree  (Ph.D., M.D., etc.)

Secondary Degree

Preferred Name  (nickname)

Telephone Number  (including country code)

Secondary Phone  (including country code)

Secondary Phone For  Mobile   Beeper  Home  Work  Admin. Asst.

Fax Number  (including country code)

E-mail Address \*

### Areas of Interest or Expertise

Please indicate your areas of expertise either by selecting from the pre-defined list using the "Select Personal Classifications" button or by adding your own Personal Keywords individually using the "Edit Personal Keywords" button.

Personal Classifications **10: Beans**  
**20: Legumes**

[Select Personal Classifications](#)

Personal Keywords legumes;  
lima beans;

[Edit Personal Keywords](#)

### Institution Related Information

Position

Institution  (max 300 characters)

Department  (max 450 characters)

Street Address

City

State or Province

Zip or Postal Code

Country \*

Address is for \*  Work  Home  Other

[Alternate Contact Information](#)

[Unavailable Dates](#)

### People Notes

[Cancel](#)

[Submit](#)

# Searching People

The screenshot displays the Editorial Manager web application interface. At the top left, the logo 'em Editorial Manager™' is visible. Below it, a navigation bar contains links: HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. A red banner across the top reads 'Important Message: Site under development. Do not use for live manuscripts'. On the right side of the top banner, there is a 'Go to:' dropdown menu with options: -- Search Page --, -- Search Page --, Submissions, Proposals, **People** (highlighted with a red circle), Quick Access --, and System Administrator Functions. Below the banner, there are two tabs: 'Editorial' and 'Proposal Menu'. On the left side, a 'Managing Editor Main Menu' is visible. The main content area is divided into several sections: 'Search' with links for 'Search Submissions' and 'Search People' (circled in red); 'Editor 'To-Do' List' containing a list of assignment categories with counts (e.g., 'My Pending Assignments (0)', 'New Submissions (0)', etc.); 'View All Assigned' with links for 'View All Assigned Submissions (1)' and 'View All Assigned Submissions being Edited (0)'; and 'Subordinate Editor's Pending Assignments (1)' with links for 'Group by Editors I Assigned', 'Group by Editor with Current Responsibility', and 'Group by Manuscript Status'. Two red arrows point from the right side of the slide towards the 'Search People' link and the 'People' dropdown option.

There are 2 ways to search EM for people:

- Both can be found on the Main Menu page
  - Search “section” at the top of the page
  - Dropdown menu in the top banner

# Searching People

em Editorial Manager™

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

Go to: -- Search Page --  
Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

### 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
Last Name	Begins With		END
First Name	Begins With		END
Institution	Begins With		
City			
State			
Country			
E-mail Address			
Phone Number			
Personal Classifications			
Personal Keywords			
People Notes			
Registration Date			
Proxy Registration			

[Editor Main Menu](#)

There are a number of search criteria which allows for specific or broad searching:

- First and Last Name
- Institution
- City
- State
- Country
- E-mail
- Phone Number
- Personal Classifications and Keywords
- People Notes
- Registration Date
- Proxy Registration

# Searching People

## Specific Search

em Editorial Manager™

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

Go to: -- Search Page --  
Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

### Search People

Choose the criterion for selecting People Records.

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

Criterion	Selector	Value
Last Name	Begins With	frye
Last Name	Begins With	
Last Name	Begins With	

[Editor Main Menu](#)

em Editorial Manager™

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

Go to: -- Search Page --  
Role: Managing Editor Username: mary

English

**Important Message: Site under development. Do not use for live manuscript submission.**

### 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
Last Name	Begins With	frye	ALL
Last Name	Begins With		END
Last Name	Begins With		END

Page: 1 of 1 (2 total People Matches)  Display 10 results per page.

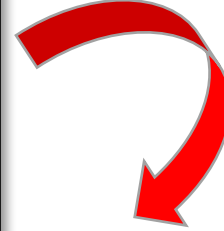
Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input type="checkbox"/>	Alexander Frye			UNITED STATES	[Author]	[Reviewer]		
<input type="checkbox"/>	Alexander Frye			UNITED STATES	[Author]	[Reviewer]		

Page: 1 of 1 (2 total People Matches)  Display 10 results per page.

[Editor Main Menu](#)

# Searching People

## Broad Search



em Editorial Manager™

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

Go to: -- Search Page --  
Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

### Search People

Choose the criterion for selecting People

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

Criterion	Selector	Value
Personal Classifications ▼	Begins With	lima beans
Last Name	Begins With ▼	
First Name	Begins With ▼	
Institution	Begins With ▼	
City		
State		
Country		
E-mail Address		
Phone Number		
Personal Classifications		
Personal Keywords		
People Notes		
People Flag Name		
Registration Date		
Proxy Registration		

[Editor Main Menu](#)

em Editorial Manager™

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

Go to: -- Search Page --  
Role: Managing Editor Username: mary

English

**Important Message: Site under development. Do not use for live manuscript submission.**

### 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
Personal Classifications ▼	Begins With ▼	lima beans	ALL ▼ END ▼
Last Name ▼	Begins With ▼		END ▼
Last Name ▼	Begins With ▼		

Page: 1 of 1 (4 total People Matches)  Display 10 results per page.

Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input type="checkbox"/>	Alexander Frye			UNITED STATES	[Author]	[Reviewer]		
<input type="checkbox"/>	Alexander Frye			UNITED STATES	[Author]	[Reviewer]		
<input type="checkbox"/>	Elaine Editor			UNITED STATES	[Author]		[Editor]	
<input type="checkbox"/>	Edward Editor			UNITED STATES	[Author]		[Editor]	

Page: 1 of 1 (4 total People Matches)  Display 10 results per page.

[Editor Main Menu](#)

# Merging Duplicate Records

The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with the logo and links for HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. The user is logged in as 'mary' with the role of 'Managing Editor'. A red banner at the top of the main content area contains the message: 'Important Message: Site under development. Do not use for live manuscript submission.'

### 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
Last Name	Begins With	frye	ALL
Last Name	Begins With		END
Last Name	Begins With		END

Page: 1 of 1 (2 total People Matches)      Display 10 results per page.

Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input checked="" type="checkbox"/>	Alexander Frye			UNITED STATES	[Author]	[Reviewer]		
<input checked="" type="checkbox"/>	Alexander Frye			UNITED STATES	[Author]	[Reviewer]		

Page: 1 of 1 (2 total People Matches)      Display 10 results per page.

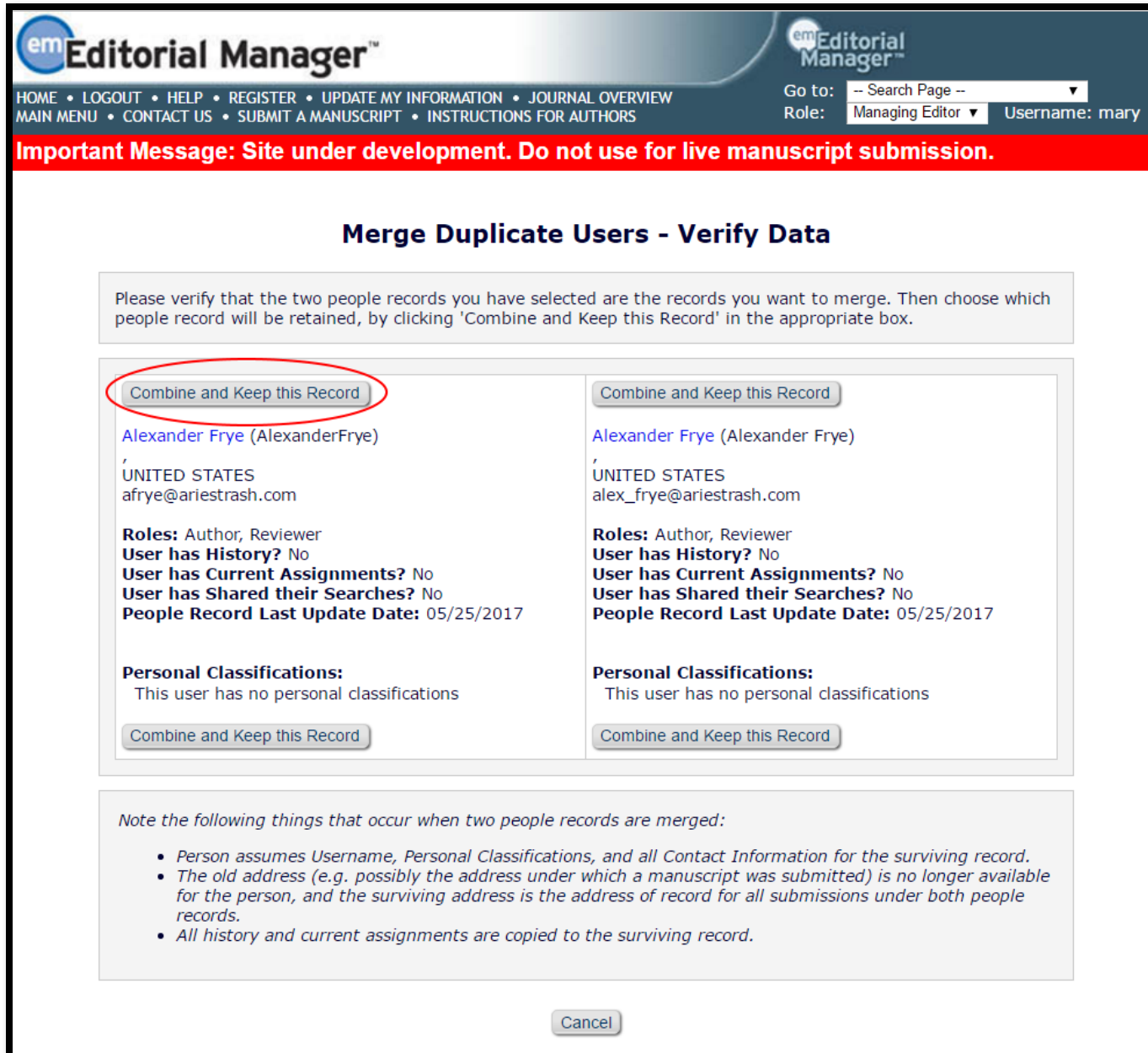
 

[Editor Main Menu](#)

- From the People Search, if duplicate records are found in EM, a “Merge People Records” functionality is available



# Merging Duplicate Records



**em Editorial Manager™**

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

Go to: -- Search Page --  
Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

### Merge Duplicate Users - Verify Data

Please verify that the two people records you have selected are the records you want to merge. Then choose which people record will be retained, by clicking 'Combine and Keep this Record' in the appropriate box.

<p><b>Combine and Keep this Record</b></p> <p>Alexander Frye (AlexanderFrye) UNITED STATES afrye@ariestrash.com</p> <p><b>Roles:</b> Author, Reviewer <b>User has History?</b> No <b>User has Current Assignments?</b> No <b>User has Shared their Searches?</b> No <b>People Record Last Update Date:</b> 05/25/2017</p> <p><b>Personal Classifications:</b> This user has no personal classifications</p> <p><b>Combine and Keep this Record</b></p>	<p><b>Combine and Keep this Record</b></p> <p>Alexander Frye (Alexander Frye) UNITED STATES alex_frye@ariestrash.com</p> <p><b>Roles:</b> Author, Reviewer <b>User has History?</b> No <b>User has Current Assignments?</b> No <b>User has Shared their Searches?</b> No <b>People Record Last Update Date:</b> 05/25/2017</p> <p><b>Personal Classifications:</b> This user has no personal classifications</p> <p><b>Combine and Keep this Record</b></p>
--	---

*Note the following things that occur when two people records are merged:*

- Person assumes Username, Personal Classifications, and all Contact Information for the surviving record.
- The old address (e.g. possibly the address under which a manuscript was submitted) is no longer available for the person, and the surviving address is the address of record for all submissions under both people records.
- All history and current assignments are copied to the surviving record.

**Cancel**

- The person assumes the username, password, personal classifications, and contact information for the surviving record
- All history and current assignments from the merged record are copied to the surviving record where possible

# People Records – User Information

**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](#)

Re-type Password \*

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](#)

- Login Credentials - Update my information only
- Preferred Login Menu
- Role settings

# People Records – Personal Information

**Personal Information**

Title  (Mr., Mrs., Dr., etc.)

Given/First Name \*

Middle Name

Family/Last Name \*

Degree  (Ph.D., M.D., etc.)

Preferred Name  (nickname)

Telephone Number  (including country code)

Secondary Phone  (including country code)

Secondary Phone For  Mobile  Beeper  Home  Work  Admin. Asst.

Fax Number  (including country code)

E-mail Address \*

If entering more than one e-mail address, use a semi-colon between each address (e.g., joe@thejournal.com;joe@yahoo.com)  
Entering a second e-mail address from a different e-mail provider decreases the chance that SPAM filters will trap e-mails sent to you from online systems. [Read more](#)

Preferred Contact Method \*  E-mail  Fax  Postal Mail  Telephone

ORCID  [Fetch](#)  
[What is ORCID?](#)

- Title
- Contact Information
- Multiple addresses
- ORCID

# People Records – Areas of Interest/Expertise

### Areas of Interest or Expertise

Please indicate your areas of expertise either by selecting from the pre-defined list using the "Select Personal Classifications" button or by adding your own Personal Keywords individually using the "Edit Personal Keywords" button.

Personal Classifications    **10: Beans**  
   **20: Legumes**

[Select Personal Classifications](#)

Personal Keywords        legumes;  
   lima beans;

[Edit Personal Keywords](#)

- Set or Update Classifications
- Set or Update Keywords

# People Records – Institutional Related Information

**Institution Related Information**

Position

Institution  (max 300 characters)

Department  (max 450 characters)

Street Address

City

State or Province

Zip or Postal Code

Country \*

Address is for \*  Work  Home  Other

- Affiliated Institution Information - Ringgold
- Alternate Contact Information
- Unavailable Dates

# People Records - Unavailable Dates

**Assign Editor**

**Manuscript Number:** MSC test 49

**Title:** adding: some extra-dash-dashes to my title

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you to choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.

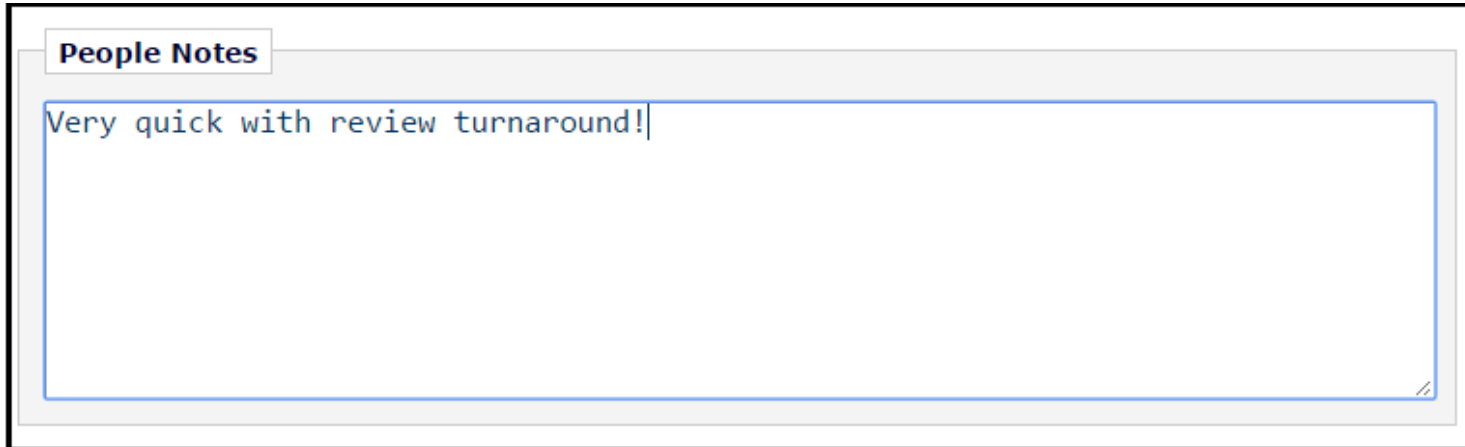
Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	AE or Reviewing Editor	<a href="#">Test Bloke</a>	0	0		Yes
<input type="radio"/>	AE or Reviewing Editor	<a href="#">Justin Cross</a>	0	0		Yes
<input type="radio"/>	Editor	<a href="#">Edward Editor</a>	0	0		Unavailable 08.01.2018 - 09.01.2018
<input type="radio"/>	Editor	<a href="#">Daisy Maisie</a>	0	0		Yes
<input type="radio"/>	Managing Editor <small>(This is the corresponding author of the submission)</small>	<a href="#">Another Author</a>	4	0		Yes
<input type="radio"/>	Managing Editor	<a href="#">Rob Burleigh</a>	0	0		Yes
<input type="radio"/>	Managing Editor <small>(Possible author of the submission) (This editor is already assigned to the current submission)</small>	<a href="#">Melanie Cotterell</a>	1	0		Yes
<input type="radio"/>	Managing Editor	<a href="#">anotherpersonwithareallylongnametoseeiftperson</a>	6	0		Yes
<input type="radio"/>	Senior Editor	<a href="#">SE BioMed</a>	1	0		Yes

When entered they can display in the system

- Assign Editor
- Invite Reviewers

# People Records – People Notes



A screenshot of a software interface showing a text box labeled "People Notes". The text box contains the text "Very quick with review turnaround!". The text box is outlined in blue and has a small cursor at the end of the text. The label "People Notes" is in a small box at the top left of the text area.

- Record any helpful notes about the user
- People Notes are searchable
- People Notes only visible to the Editorial office!
- Detailed People Notes

# Inactivating People Records

- From the People Record page, the editorial office can inactivate a user
  - This will remove the user from the system
  - EM retains some user information, such as decisions on previous assignments, for historical purposes

### 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.

---

**Doctor Worm**

Proxy-Registered:  
07.01.2014  
(Data Unconfirmed by User)

Last Modified:  
26.05.2015

[Inactivate this User](#)

[Send Login Details](#)

\*\*The user will be sent an email with a link to reset their password. The password will not reset until the user clicks that link.

Exclude this user from receiving all batch and reminder emails:  
 Always  
 When Unavailable Dates are active

### User Information

[Open Special Character Palette](#)

Default Login Menu: Editorial Menu

Available as a Reviewer? Yes  No

Board Member? Yes  No

Forbidden as a Reviewer? Yes  No

Reviewer Role \*: None

Publisher Role \*: None

Editorial Role \*: None

Editor Description:

[Activity Details](#)

[Additional People Details](#)

### Personal Information

Title:  (Mr., Mrs., Dr., etc.)

Given/First Name \*: Doctor

Secondary Given/First Name:

Middle Name:

Family/Last Name \*: Worm

Secondary Family/Last Name:

Name:

Degree:  (Ph.D., M.D., etc.)

Secondary Degree:

Preferred Name:  (nickname)

Telephone Number:  (including country code)

Secondary Phone:  (including country code)

Secondary Phone For: Mobile  Beeper  Home  Work  Admin. Asst.

Fax Number:  (including country code)

E-mail Address \*: trash3@ariessc.com



# Sending User Login Credentials

## 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.

---

### Doctor Worm

Proxy-Registered:  
07.01.2014  
(Data Unconfirmed by User)

Last Modified:  
26.05.2015

[Inactivate this User](#)

[Send Login Details](#)

\*\*The user will be sent an email with a link to reset their password. The password will not reset until the user clicks that link.

Exclude this user from receiving all batch and reminder emails:

Always

When Unavailable Dates are active

### User Information

[Open Special Character Palette](#)

Default Login Menu: Editorial Menu

Available as a Reviewer? Yes  No

Board Member? Yes  No

Forbidden as a Reviewer? Yes  No

Reviewer Role \*: None

Publisher Role \*: None

Editorial Role \*: None

Editor Description

[Activity Details](#)

[Additional People Details](#)

### Personal Information

Title: (Mr., Mrs., Dr., etc.)

Given/First Name \*: Doctor

Secondary Given/First Name

Middle Name

Family/Last Name \*: Worm

Secondary Family/Last Name

Name

Degree: (Ph.D., M.D., etc.)

Secondary Degree

Preferred Name: (nickname)

Telephone Number: (including country code)

Secondary Phone: (including country code)

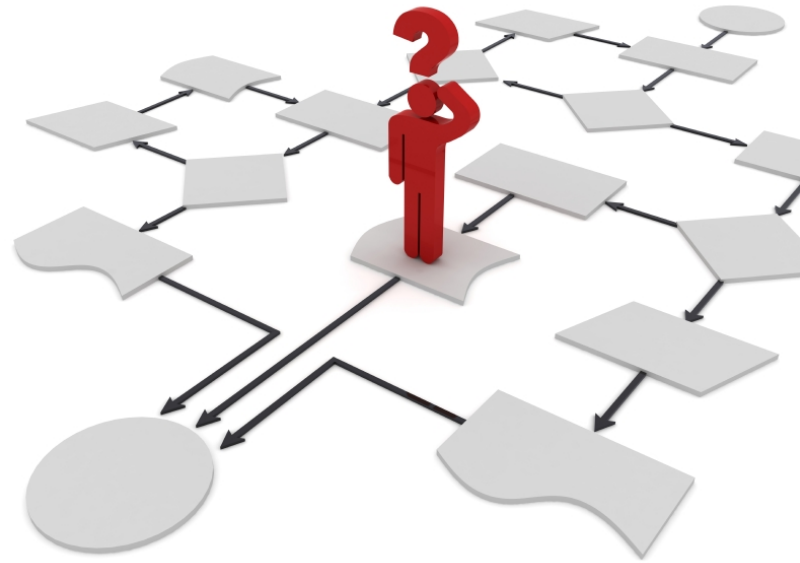
Secondary Phone For: Mobile  Beeper  Home  Work  Admin. Asst.

Fax Number: (including country code)

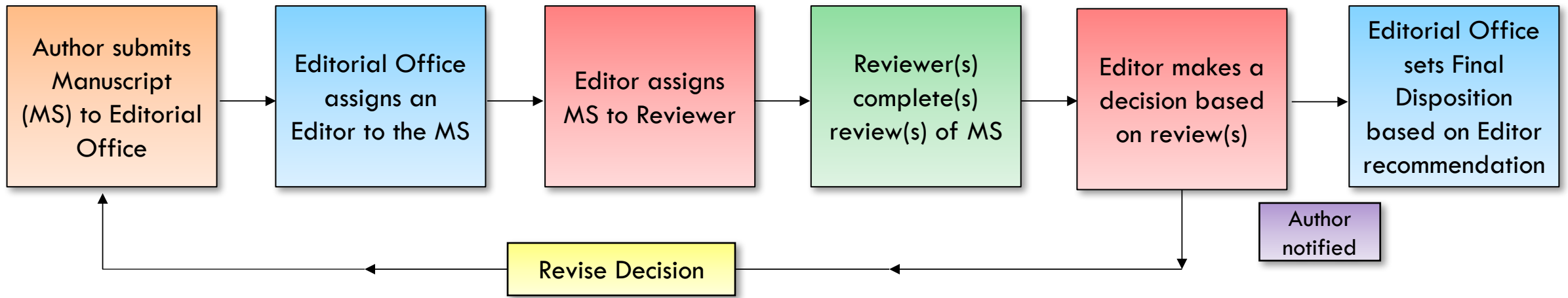
E-mail Address \*: trash3@ariessc.com



- Editors with proper permission may also send a user their username/ password from the People Record page



# Workflow Examples



## Standard Workflow

**Q:** What is a “workflow?”

**A:** A workflow is the editorial process that the manuscript goes through before publication. Publishers have different workflows, depending on their content and their staff.

**Q:** Why is this one considered standard?

**A:** This is considered standard because it includes all of the typical editorial “steps,” like:

- being submitted by an author (rather than the Editorial Office inviting authors)
- being looked at by an Editor (but not multiple Editors, i.e., an Editor Chain)
- being reviewed
- allowing for revisions
- Final Disposition being set

Author submits  
Manuscript  
(MS) to  
Editorial  
Office

# Standard Workflow

**em Editorial Manager™**  
HOME • LOGOUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW  
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS  
Role: Author Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

### New Submission

Please Attach Files

Required **Items** are marked with a \*. When all **Items** have been attached, click **Next** at the bottom of the page.

Item \*Manuscript

Enter a **Description** and then either choose file

Description Manuscript

Manuscript Word Count:

[Choose Files](#)

The order in which the attached items appear in the list will be the order in which they appear in the 'Update File Order' button to effect the change.

Order	Item	Description	File Name
1	*Manuscript	Manuscript	s5.pdf

[Update File Order](#)

[Previous](#) [Next](#)

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MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS  
Role: Author Username: mary

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### New Submission

- ✓ Select Article Type
- ✓ Enter Title
- ✓ Add/Edit/Remove Authors
- ✓ Select Section/Category
- ✓ Submit Abstract
- ✓ Enter Keywords
- ✓ Select Classifications
- ✓ Additional Information
- ✓ Enter Comments
- ✓ Suggest Reviewers
- ✓ Oppose Reviewers
- ✓ Select Region of Origin
- ➔ **Attach Files**

#### Summary Following Attach Files

Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required Items are marked with \*. You can change the order by re-numbering the files.

	Online	Offline		Online	Offline
Author Agreement	0	0	Figure	0	
*Manuscript	1		Table	0	
Dataset	0				

[Previous](#) [Build PDF for my Approval](#)

# Standard Workflow

Editorial Office assigns an Editor to the MS



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Go to: -- Search Page --  
Role: Managing Editor Username: mary

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Editorial Proposal Menu

Managing Editor Main

Search  
Search Submissions | Search People

Editor 'To-Do' List

- My Pending Assignments (2)
  - New Submissions (1)
  - Revised Submissions (0)
  - 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)

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Go to: -- Search Page --  
Role: Managing Editor Username: mary

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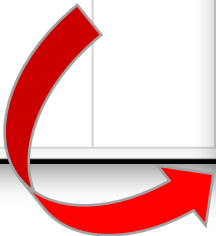
Quicklinks

**New Submissions Requiring Assignment - mary mary**

Contents: These are the new submissions that require an Editor Assignment. Use the up/down arrows to change the sort order.

Page: 1 of 1 (1 total submissions)

Action	Manuscript Number	Article Type
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (...)</a> <a href="#">Details ▾</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Information</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Send Back to Author</a> <a href="#">Remove Submission</a> <a href="#">Classifications</a> <b><a href="#">Assign Editor</a></b> <a href="#">Set Final Disposition</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>		Original Study



**Assign Editor**

Title: Original Study Title

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you to choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

Manuscript Classifications  
(1) Beans; (2) Legumes; (3) Peas

Cancel Send Custom Letters Send Default Letters

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input checked="" type="radio"/>	Editor	Edward Editor	2	0		Yes
<input type="radio"/>	Editor	Elaine Editor	0	0		Yes

Cancel Send Custom Letters Send Default Letters

# Standard Workflow

Editor  
assigns MS  
to Reviewer

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Go to: -- Search Page --  
Role: Editor Username: EdwardEditor

English

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Proxying for Edward Editor - Editor To exit proxy mode, click 'Logout'.

### New Editor Assignments - Edward Editor

**Contents:** These are submissions that have been Assigned to the Editor. They require one of the following: another Editor assignment, Reviewer invitations, or Decision. Use the up/down arrows to change the sort order.

Page: 1 of 1 (1 total submissions) Display 10 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Decision
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Assign Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Solicit Commentary</a> <a href="#">Submit Editor's Decision and Comments</a> <a href="#">Send E-mail</a>	DEMOJES131-D-17-00005	Original Study		Sunshine and the lack of it: Seasonal Mood Disorder	mary mary	May 30, 2017	May 30, 2017	With Editor	

Page: 1 of 1 (1 total submissions) Display 10 results per page.

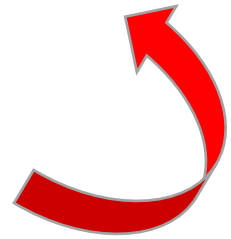
[Editor Main Menu](#)

**Editorial** **Proposal Menu**

## Editor Main Menu

### Editor 'To-Do' List

- My Pending Assignments (2)
  - New Submissions (0)
  - Revised Submissions (0)
  - New Submissions Requiring Assignment (0)
  - Revised Submissions Requiring Assignment (0)
  - New Assignments (1)**
  - Submissions with Required Reviews Complete (1)
  - Submissions Requiring Additional Reviewers (0)
  - Submissions with One or More Late Reviews (0)
- Reviews in Progress (0)
  - Reviewers Invited - No Response (0)
  - Submissions Under Review (0)



# Standard Workflow

Editor  
assigns MS  
to Reviewer

**Reviewer Candidates**

Select a checkbox by each person you wish to select as a Reviewer ([more...](#)).

Page: 1 of 1 (4 total Reviewers) Display 10 results per page.

Select As				Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics										
Inv.	Asn.	Alt.	Prop.				Reviews in Progress:	Completed Reviews:	Date Last Invited:	Outstanding Invitations:	Agreed:	Declined:							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alexander Frye (Reviewer)	No	1 Class match with MS * 20: Legumes	0	0	-	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alexander Frye (Reviewer)	No		0	0	-	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rachel Reviewer (Reviewer)	No		0	3	May 25, 2017	0	3	0	0	0	0	0	0	0	0

**em Editorial Management**

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**Important Message: Site un**

**Proxying for Edward Editor**

## Reviewer Selection Summary - Submission DEMOJES131-D-17-00005

mary mary  
~~Sunshine and the lack of it: Seasonal Mood Disorder~~

### Reviewer Search

Search My Publication
 
 from

[Return to New Editor Assignments](#)

[Return to Main Menu](#)

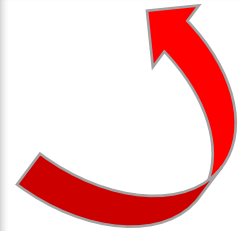
**View Submission Information**

[Manuscript Details](#)

[Classifications](#)

[View Submission](#)

[Author's Reviewer Preferences](#)



# Standard Workflow

Reviewer(s)  
complete(s)  
review(s) of  
MS

### Reviewer Main Menu

My Review History

#### Review Assignments

- New Reviewer Invitations (0)
- Pending Assignments (1)**
- Completed Assignments (0)

#### Reviewer Recommendation and Comments for Manuscript Number DEMOJES131-D-17-00005

Sunshine and the lack of it: Seasonal Mood Disorder

Original Submission  
Alexander Frye (Reviewer 1)

Recommendation: **Accept** Overall Manuscript Rating (1-100): **95**

#### Review Questions

\*Are you willing to review the revision of this manuscript?

#### Manuscript Rating

These instructions are customizable by the journal.

\*The subject addressed in this article is worthy of investigation.

N/A  1  2  3

\*The information presented was new.

N/A  1  2  3  4  5

#### Reviewer Recommendation and Comments for Manuscript Number DEMOJES131-D-17-00005

Sunshine and the lack of it: Seasonal Mood Disorder

Original Submission  
Alexander Frye Reviewer 1

**Recommendation:** **Accept**

**Overall Manuscript Rating (1 - 100):** 95

Custom Review Question(s)	Response
Are you willing to review the revision of this manuscript?	Yes
<b>Manuscript Rating Question(s):</b> The subject addressed in this article is worthy of investigation.	Scale: [1-3] Rating: 3
The information presented was new.	[1-5] 5
The conclusions were supported by the data.	[1-10] 10

**Reviewer Confidential Comments to Editor:**

Is there a financial or other conflict of interest between your work and that of the authors?  
YES \_\_ NO \_\_

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



Editor makes a decision based on review(s)

# Standard Workflow

Editorial
Proposal Menu

### Editor Main Menu

**Submissions With:**

0 Reviews Complete <small>1</small>	1 Review Complete <small>0</small>	2 Reviews Complete <small>1</small>	3 Reviews Complete <small>0</small>	4+ Reviews Complete <small>0</small>
--	---------------------------------------	--	--	---

**Search**

Search Submissions | Search People

**Editor 'To-Do' List**

- My Pending Assignments (2)
- New Submissions (0)
- Revised Submissions (0)
- New Submissions Requiring Assignment (0)
- Revised Submissions Requiring Assignment (0)
- New Assignments (0)
- Submissions with Required Reviews Complete (2)
- Submissions Requiring Additional Reviewers (0)

**Submissions with Required Reviews Complete - Edward Editor**

**Contents:** New and revised manuscripts that have the number of required reviews completed. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Make a Decision. Use the up/down arrows to change the sort order.

Page: 1 of 1 (2 total submissions) Display  results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Review Status	Editor Decision
<ul style="list-style-type: none"> <li><a href="#">View Submission Details</a></li> <li><a href="#">History</a></li> <li><a href="#">File Inventory</a></li> <li><a href="#">Classifications</a></li> <li><a href="#">Assign Editor</a></li> <li><a href="#">Invite Reviewers</a></li> <li><a href="#">Solicit Commentary</a></li> <li style="border: 1px solid red; border-radius: 10px; padding: 2px;">View Reviews and Comments</li> <li><a href="#">Submit Editor's Decision and Comments</a></li> <li><a href="#">Send E-mail</a></li> </ul>	DEMOJES131-D-17-00005	Original Study		Sunshine and the lack of it: Seasonal Mood Disorder	mary mary	May 30, 2017	May 30, 2017	Required Reviews Completed	2 Complete (more...)	

Editor makes a decision based on review(s)

# Standard Workflow

## View Reviews and Comments:

Cancel Re-open Review Save and Close

**DEMOJES131-D-17-00005**  
**"Sunshine and the lack of it: Seasonal Mood Disorder"**  
**Original Submission**

**Alexander Frye (Reviewer 1)**

Reviewer Recommendation Term: Accept  
 Overall Reviewer Manuscript Rating: 95  
 Rate Review:  Please enter a number from 1-100

Custom Review Question(s)	Response
Are you willing to review the revision of this manuscript?	Yes

Manuscript Rating Question(s)	Scale	Rating
The subject addressed in this article is worthy of investigation.	[1-3]	3
The information presented was new.	[1-5]	5
The conclusions were supported by the data.	[1-10]	10

**Comments to Editor:**

Is there a financial or other conflict of interest between your work and that of the authors?  
 YES \_\_ NO \_\_

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

**Comments to Author:**

[More Reviewer Details](#)

Cancel Re-open Review Save and Close

**View Reviews and Comments for Manuscript**  
**DEMOJES131-D-17-00005**  
**"Sunshine and the lack of it: Seasonal Mood Disorder"**  
**Original Submission**

Click the recommendation term to view the comments for the submission.

Att

	Original Submission
Alexander Frye (Reviewer 1)	Accept
Rachel Reviewer (Reviewer 2)	Accept
Edward Editor (Editor)	
Author Decision Letter	
mary mary (Author)	

Close

# Standard Workflow

Editor makes a decision based on review(s)

**Submissions with Required Reviews Complete - Edward Editor**

**Contents:** New and revised manuscripts that have the number of required reviews completed. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Make a Decision. Use the up/down arrows to change the sort order.

Page: 1 of 1 (2 total submissions) Display | 10 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Review Status	Editor Decision
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Assign Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Solicit Commentary</a> <a href="#">View Reviews and Comments</a> <a href="#">Submit Editor's Decision and Comments</a> <a href="#">Send E-mail</a>	DEMOJES131-D-17-00005	Original Study		Sunshine and the lack of it: Seasonal Mood Disorder	mary mary	May 30, 2017	May 30, 2017	Required Reviews Completed	2 Complete (more...)	

**Draft Decision for Manuscript Number DEMOJES131-D-17-00005**

**Sunshine and the lack of it: Seasonal Mood Disorder**  
Original Submission  
Edward Editor

[Back](#) [Edit Decision](#) [Print](#) [Submit Decision](#)

Decision: **Accept** Overall Manuscript Rating (1-100): 97

**Confidential Comments to Editor**  
Please give a frank account of the strengths and weaknesses of the article:

Reviewer, Alexander Frye: Is there a financial or other conflict of interest between your work and that of the authors?  
YES \_\_\_ NO \_\_\_

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

Reviewer, Rachel Reviewer: Is there a financial or other conflict of interest between your work and that of the authors?  
YES \_\_\_ NO \_\_\_

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

**Comments to Author**

Manuscript Rating Question	Scale	Rating
The subject addressed in this article is worthy of investigation.	[1-3]	3
The information presented was new.	[1-5]	5
The conclusions were supported by the data.	[1-10]	10

**Editor Decision and Comments for Manuscript Number DEMOJES131-D-17-00005**

**Sunshine and the lack of it: Seasonal Mood Disorder**  
Original Submission  
Edward Editor (Editor)

Decision: **Accept** Overall Editor Manuscript Rating (1-100): 97

[Cancel](#) [Submit Later](#) [Proof & Print](#) [Proceed](#)

[Details](#) [History](#) [Attachments \(0\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Manuscript Rating Card](#) [View Reviews](#)

Original Submission	
Alexander Frye (Reviewer 1)	Accept
Rachel Reviewer (Reviewer 2)	Accept
Edward Editor (Editor)	Assigned - No Decision
Author Decision Letter	
mary mary (Author)	

If the decision is Revise, the author has 30 days to revise this submission. [Editor Instructions](#)

These instructions are customizable by the journal.

The subject addressed in this article is worthy of investigation.  
● N/A 1 2 3

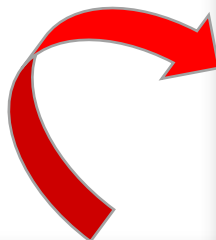
The information presented was new.  
● N/A 1 2 3 4 5

The conclusions were supported by the data.  
● N/A 1 2 3 4 5 6 7 8 9 10

# Standard Workflow

Editorial Office  
sets Final  
Disposition  
based on Editor  
recommendation

Author  
notified



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Go to: -- Search Page --  
Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

Quicklinks

### All Submissions with Editor's Decision - mary mary

Contents: All submissions for which an Editor has submitted a decision.

Page: 1 of 1 (1 total submissions)

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Assign Editor</a> <a href="#">Notify Author</a> <a href="#">Set Final Disposition</a> <a href="#">View Reviews and Comments</a> <a href="#">Rescind Decision</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOJES131-D-17-00003	Original Study		Original Study Title	mary mary	May 15, 2017	May 15, 2017

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Go to: -- Search Page --  
Role: Managing Editor Username: mary

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### Notify Author

Manuscript Number: DEMOJES131-D-17-00003

Title: Original Study Title

To notify the author of the Final Editor's Decision, use the 'Send Now' button.

If permitted, you may reject this decision and send the assignment back to the previous Editor, by using the Return to (Editor) link.

Buttons:

Editor Decision: Accept

Modify Decision:

Rescind Decision: [Return to Editor](#)

From: The Journal <trash1@ariessc.com>

To: mary mary

Letter Purpose: Editor Decision - Accept

Letter Subject: Your Submission

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: bcc:

Editors Assigned to Manuscript

Edward Editor (Editor)

cc:

bcc:

Letter Body:

Ref.: Ms. No. DEMOJES131-D-17-00003  
Original Study Title  
JES Demo 13.1

Dear %TITLE% %LAST\_NAME%,

I am pleased to tell you that your work has now been accepted for publication in JES Demo 13.1.

It was accepted on %FINAL\_EDITOR\_DECISION\_DATE%

Comments from the Editor and Reviewers can be found below.

The DOI is: %DOI%

Thank you for submitting your work to this journal.

With kind regards

mary mary  
Managing Editor  
JES Demo 13.1

Editorial Office  
sets Final  
Disposition  
based on Editor  
recommendation

# Standard Workflow



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Go to: -- Search Page --  
Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

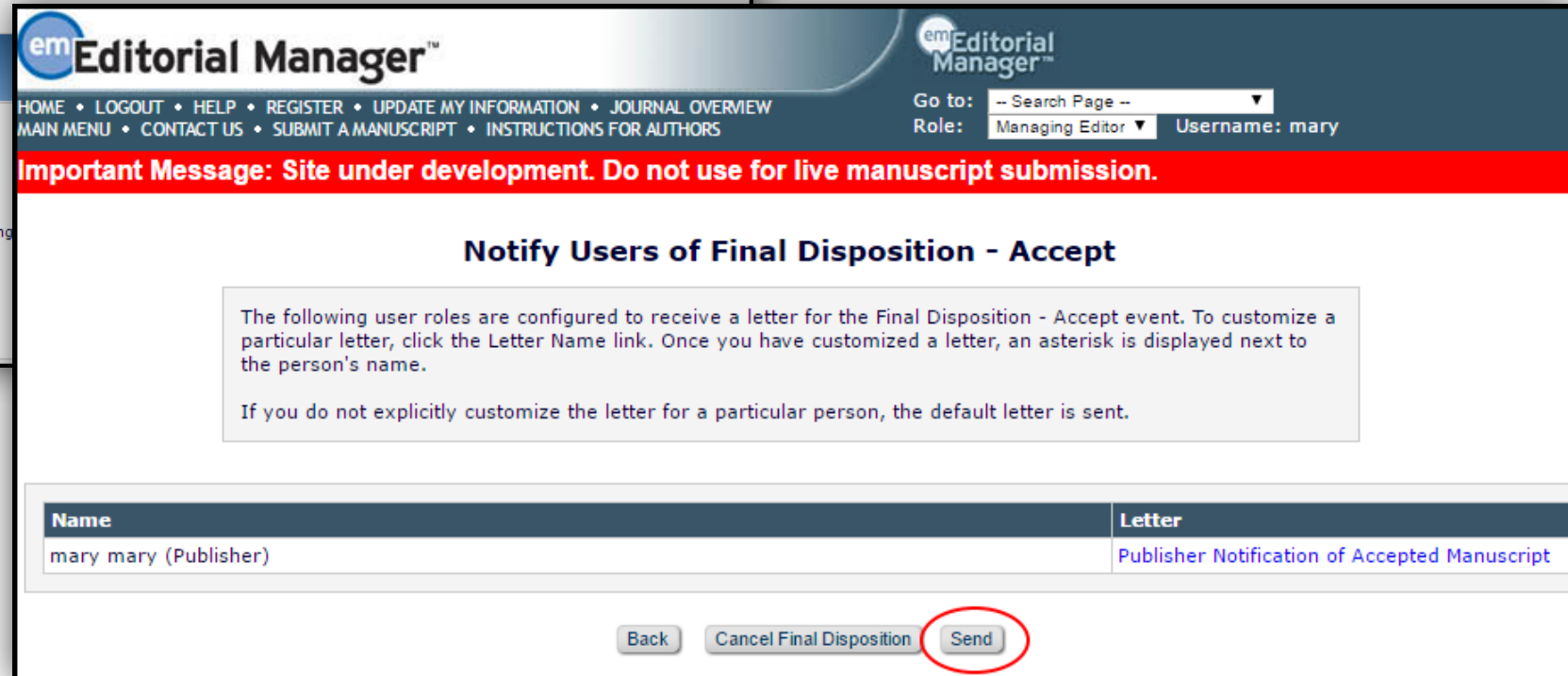
Quicklinks

### All Submissions with Editor's Decision - mary mary

Contents: All submissions for which an Editor has submitted a decision.

Page: 1 of 1 (1 total submissions)

Action	Manuscript Number	Article Type	Section Category	Article Title
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <b><a href="#">Set Final Disposition</a></b> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a> <a href="#">Rescind Decision</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOJES131-D-17-00004	Original Study		Test for Watermarking



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Go to: -- Search Page --  
Role: Managing Editor Username: mary

**Important Message: Site under development. Do not use for live manuscript submission.**

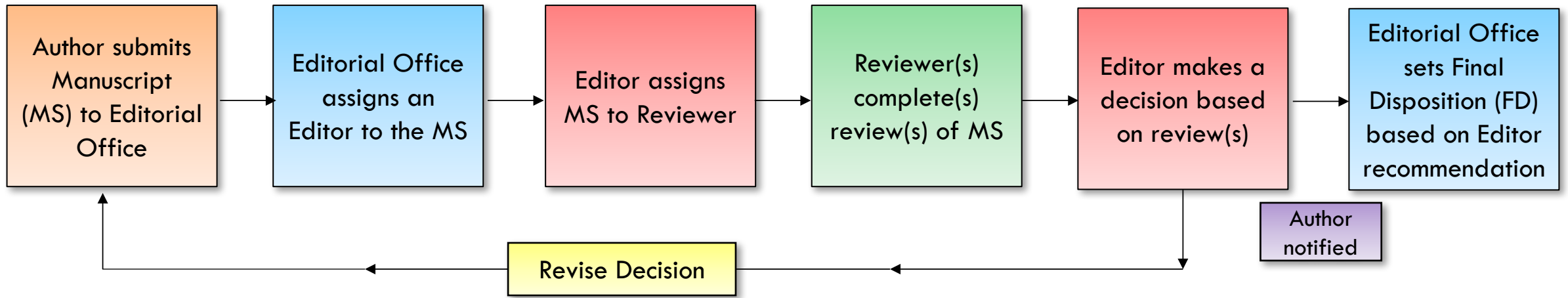
### Notify Users of Final Disposition - Accept

The following user roles are configured to receive a letter for the Final Disposition - Accept event. To customize a particular letter, click the Letter Name link. Once you have customized a letter, an asterisk is displayed next to the person's name.

If you do not explicitly customize the letter for a particular person, the default letter is sent.

Name	Letter
mary mary (Publisher)	<a href="#">Publisher Notification of Accepted Manuscript</a>

[Back](#) [Cancel Final Disposition](#) **[Send](#)**

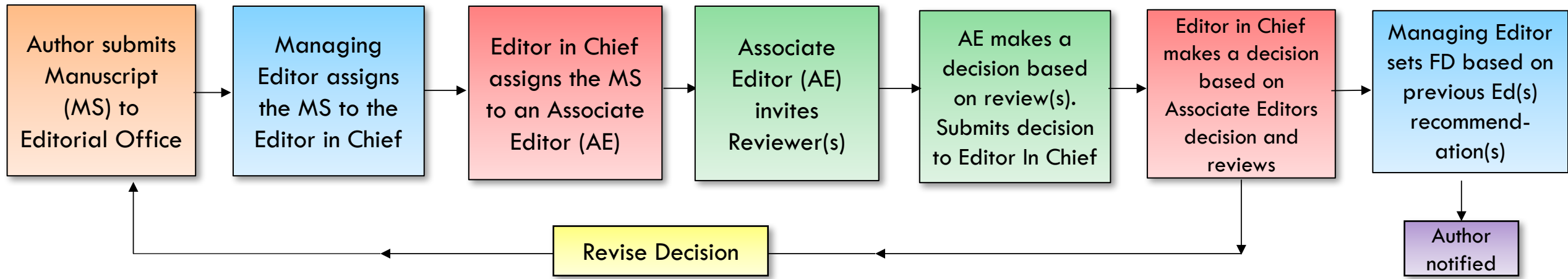


## Standard Workflow

If the decision made is a Revise decision, the process will repeat:

Back to Author > Editorial Office > Editor\* > Reviewer\* > Editorial office

\* EM will remember the Editors and Reviewers associated with the first version of the manuscript!



## Editor Chain Workflow

Author submits  
Manuscript  
(MS) to  
Editorial  
Office

# Editor Chain Workflow

Action ▲	Title ▲▼	Date Submission Began ▲▼	Status Date ▲▼	Current Status ▲▼
<a href="#">View Submission</a> <a href="#">Edit Submission</a> <a href="#">Approve Submission</a> <a href="#">Remove Submission</a> <a href="#">Correspondence</a> <a href="#">Send E-mail</a>	Test Submission for EMUG	May 15, 2017	May 15, 2017	Needs Approval



Managing Editor assigns the MS to the Editor in Chief

# Editor Chain Workflow

**Action**

- View Submission
- Duplicate Submission Check (...)
- Details ▾
- Initiate Discussion
- History
- File Inventory
- Edit Submission
- Send Back to Author
- Remove Submission
- Classifications
- Assign Editor**
- Set Final Disposition
- Send E-mail
- Linked Submissions



Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Editorial Assistant	Michelle Ploof	1	0		Unavailable
<input checked="" type="radio"/>	Editor-in-Chief	Jack Smith	3	0		Yes

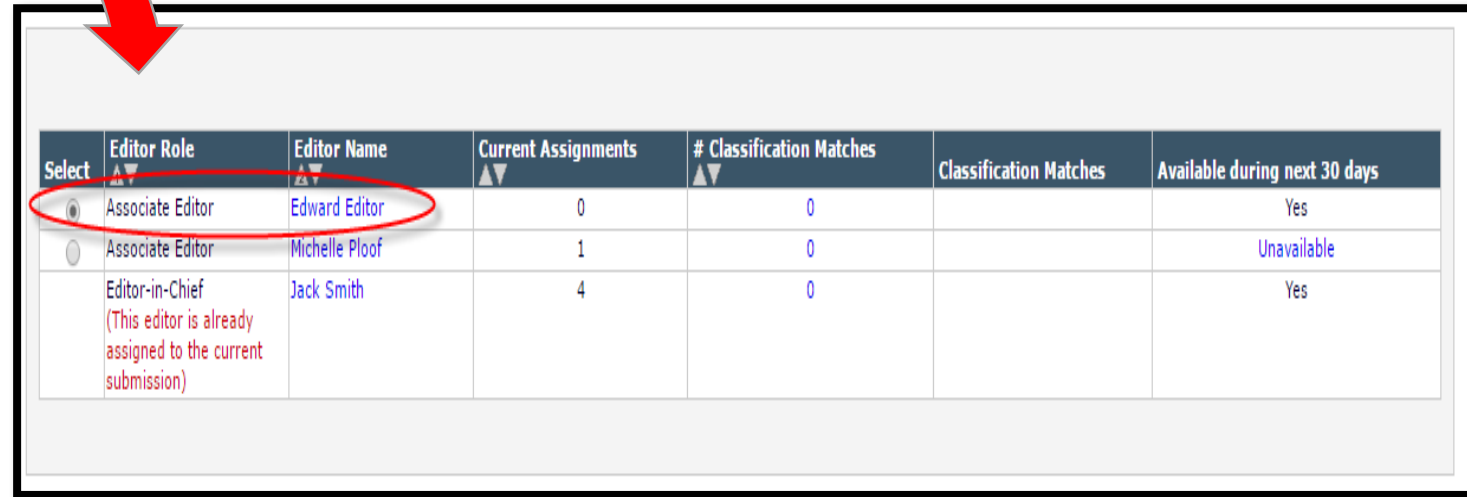
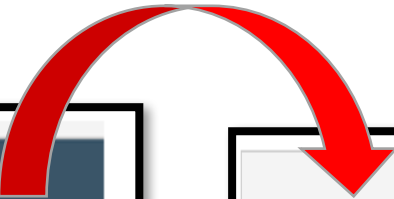
Editor in Chief  
assigns the MS  
to an  
Associate  
Editor (AE)

# Editor Chain Workflow



**Action**

- View Submission Details
- History
- File Inventory
- Classifications
- Assign Editor**
- Invite Reviewers
- Solicit Commentary
- Submit Editor's Decision and Comments
- Send E-mail



Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Associate Editor	Edward Editor	0	0		Yes
<input type="radio"/>	Associate Editor	Michelle Ploof	1	0		Unavailable
	Editor-in-Chief (This editor is already assigned to the current submission)	Jack Smith	4	0		Yes

Associate Editor (AE) invites Reviewer(s)

# Editor Chain Workflow

**Action**

- View Submission Details
- History
- Assign Editor
- Invite Reviewers**
- Send E-mail

### Reviewer Selection Summary - Submission DEMODC131-D-17-00007

Danielle Collins  
Test Submission for EMUG

**Reviewer Search**

Search My Publication
 
 from

**Reviewer Candidates**

Select a checkbox by each person you wish to select as a Reviewer (more...).

Page: 1 of 1 (6 total Reviewers)      Display 10 results per page.

Select As	Inv.	Asn.	Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)	Invitation Statistics
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Hal Author (Reviewer)	No		Reviews in Progress: 0 Completed Reviews: 3 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: May 12, 2017 Last Review Completed: May 12, 2017 Last Review Declined: - Avg Days Outstanding: - Manuscript Rating: 93 Avg Review Rating: 0.0	Date Last Invited: May 12, 2017 Outstanding Invitations: 0 Agreed: 3 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 3
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edward Editor (Reviewer)	No		Reviews in Progress: 0 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Last Review Completed: - Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0	Date Last Invited: - Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Michelle Ploof (Reviewer) Philippine Rice Research Institute Unavailable	No		Reviews in Progress: 0 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Last Review Completed: - Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0	Date Last Invited: - Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Alex Porfido (Reviewer)	No		Reviews in Progress: 1 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: May 10, 2017 Last Review Completed: - Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0	Date Last Invited: May 10, 2017 Outstanding Invitations: 0 Agreed: 1 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 1

# Editor Chain Workflow

AE makes a decision based on review(s). Submits decision to Editor In Chief

**Action**

- [View Submission Details](#)
- [History](#)
- [Invite Reviewers](#)
- [Notify Editor](#)
- [View Reviews and Comments](#)
- [Send E-mail](#)



**View Reviews and Comments for Manuscript**  
**DEMODC131-D-17-00007**  
**"Test Submission for EMUG"**  
**Original Submission**

---

Click the recommendation term to view the comments for the submission.

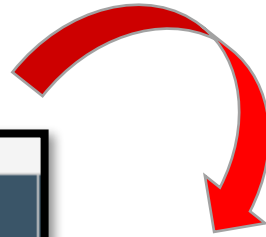
---

[Attachments \(0\)](#)   [View Manuscript Rating Card](#)   [View Review Question Responses](#)

	Original Submission
<a href="#">Hal Author</a> (Reviewer 1)	Accept
<a href="#">Alex Porfidio</a> (Reviewer 2)	Accept

# Editor Chain Workflow

AE makes a decision based on review(s).  
Submits decision to Editor In Chief



- Action
- View Submission
- Details
- History
- Assign Editor
- Invite Reviewers
- View Reviews and Comments
- Submit Editor's Decision and Comments
- Send E-mail

Editor-in-Chief Decision and Comments for Manuscript Number DEMODC131-D-17-00006

Test Submission for EMUG

Original Submission  
Jack Smith (Editor-in-Chief)

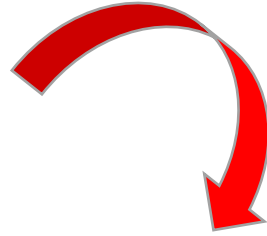
Decision:  Overall Editor Manuscript Rating (1-100):

[Details](#) [History](#) [Attachments \(0\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Manuscript Rating Card](#) [View Review Question Responses](#) [Send E-mail](#)

Original Submission	
Hal Author (Reviewer 1)	Accept
Alex Porfidio (Reviewer 2)	Accept
Jack Smith (Editor-in-Chief)	Assigned - No Decision
Author Decision Letter	
many mary (Author)	

Editor in Chief  
makes a decision  
based on  
Associate Editors  
decision and  
reviews

# Editor Chain Workflow



**Action**

- [View Submission Details](#)
- [History](#)
- [Assign Editor](#)
- [Invite Reviewers](#)
- [View Reviews and Comments](#)
- [Submit Editor's Decision and Comments](#)
- [Send E-mail](#)

Editor-in-Chief Decision and Comments for Manuscript Number DEMODC131-D-17-00007

Test Submission for EMUG

Original Submission  
Jack Smith (Editor-in-Chief)

Decision:  Overall Editor Manuscript Rating (1-100):

[Details](#) [History](#) [Attachments \(0\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Manuscript Rating Card](#) [View Review Question Responses](#) [Send E-mail](#)

Original Submission	
Hal Author (Reviewer 1)	Accept
Alex Porfidio (Reviewer 2)	Accept
Edward Editor (Associate Editor)	[Skipped]
Jack Smith (Editor-in-Chief)	Assigned - No Decision
Author Decision Letter	
Danielle Collins (Author)	

[Editor Instructions](#)

# Editor Chain Workflow

Managing Editor sets final disposition based on previous Ed(s) recommendation(s)

Author notified

## Action

- View Submission Details
- History
- Unassign Editor
- File Inventory
- Edit Submission
- Solicit Commentary
- Assign Editor
- Notify Author**
- Set Final Disposition
- View Reviews and Comments
- Rescind Decision
- Send E-mail
- Linked Submissions



**Notify Author**

**Manuscript Number:**  
DEMODC131-D-17-00007

**Title:** Test Submission for EMUG

To notify the author of the Final Editor's Decision, use the 'Send Now' button.

If permitted, you may reject this decision and send the assignment back to the previous Editor by using the Return to (Editor) link.

**Editor Decision:** Accept

**Modify Decision:** | Accept ▼

**Rescind Decision:** Return to Editor-in-Chief

**From:** The Journal <trash1@ariessc.com>

**To:** Danielle Collins

**Letter Purpose:** Editor Decision - Accept

**Letter Subject:** Your Submission

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

**cc:**  **bcc:**

Editors Assigned to Manuscript

Jack Smith (Editor-in-Chief)

Edward Editor (Associate Editor)

**cc:**

**bcc:**

**Letter Body:** [Insert Special Character](#) [Open in New Window](#)

Ref.: Ms. No. DEMODC131-D-17-00007  
Test Submission for EMUG  
DC Demo 13.1

Dear %TITLE% %LAST\_NAME%,

I am pleased to tell you that your work has now been accepted for publication in DC Demo 13.1.

It was accepted on %FINAL\_EDITOR\_DECISION\_DATE%

Comments from the Editor and Reviewers can be found below.

Thank you for submitting your work to this journal.

With kind regards

Mary Mary  
Managing Editor  
DC Demo 13.1

Comments from the Editors and Reviewers:

The following files can be made available to the Author. If the 'Allow Author Access' checkbox is selected, the file will be available to the Author. If the 'Allow Author Access' checkbox is NOT selected, the file will not be available to the Author.

# Editor Chain Workflow

Managing Editor sets final disposition based on previous Ed(s) recommendation(s)

**Action**

- View Submission Details ▾
- History
- Unassign Editor
- File Inventory
- Edit Submission
- Solicit Commentary
- Set Final Disposition**
- Transmittal Form
- View Reviews and Comments
- Rescind Decision
- Send E-mail
- Linked Submissions



## Set Final Disposition

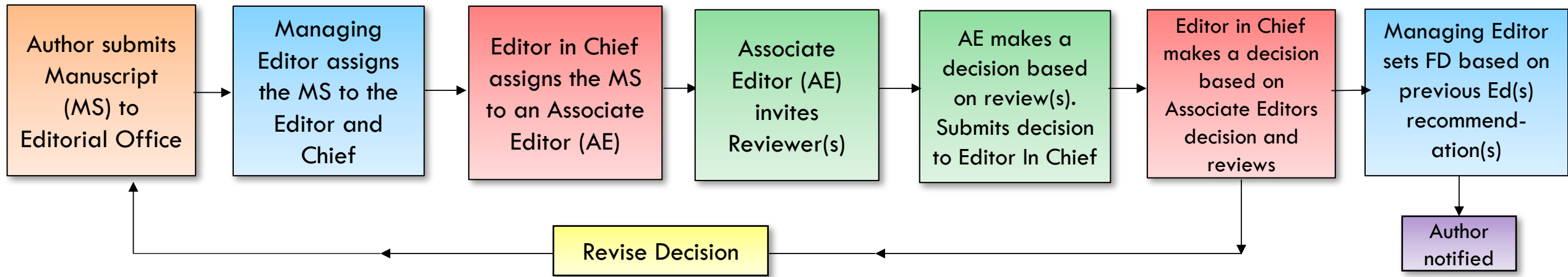
**Manuscript Number: DEMODC131-D-17-00007**  
**"Test Submission for EMUG"**

Setting the final disposition completes the peer-review process. You may only set a Final Disposition of "Accept" or "Reject" after you notify the author of the editor's decision.

Setting a Final Disposition of "Accept" may initiate production or trigger transmittal of data to the publisher if your publication is configured to do this.

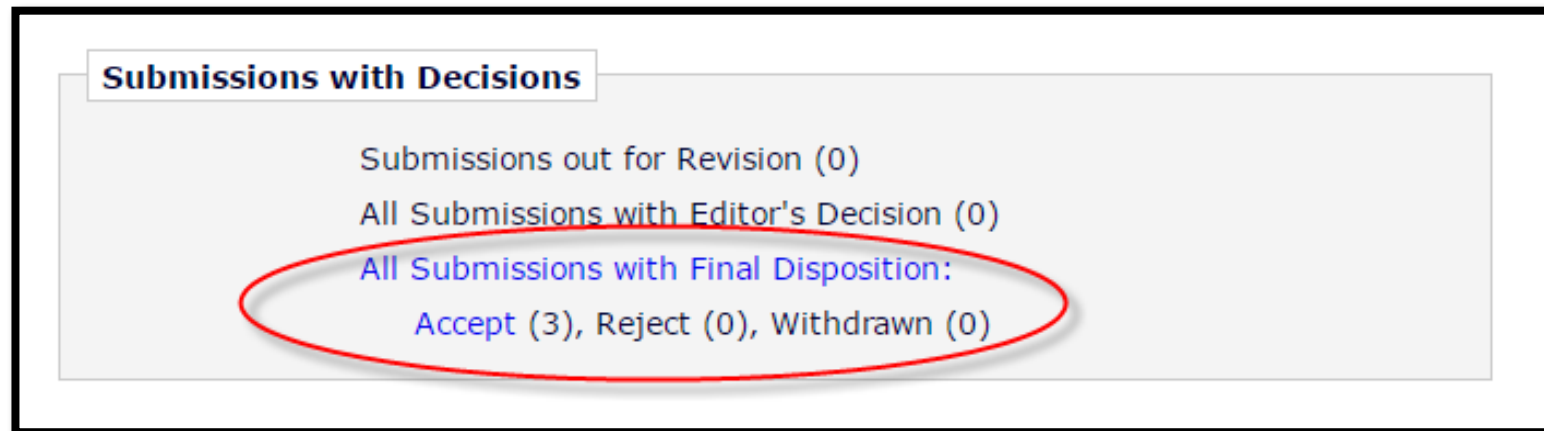
Final Disposition:





## Editor Chain Workflow

- Submission will now be in the All Submissions with Final Disposition folder. This completes the peer review process.





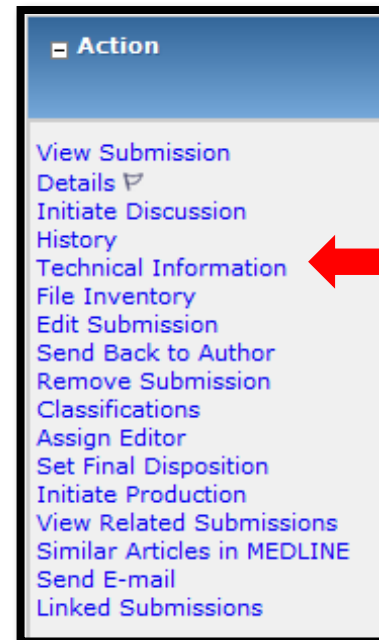
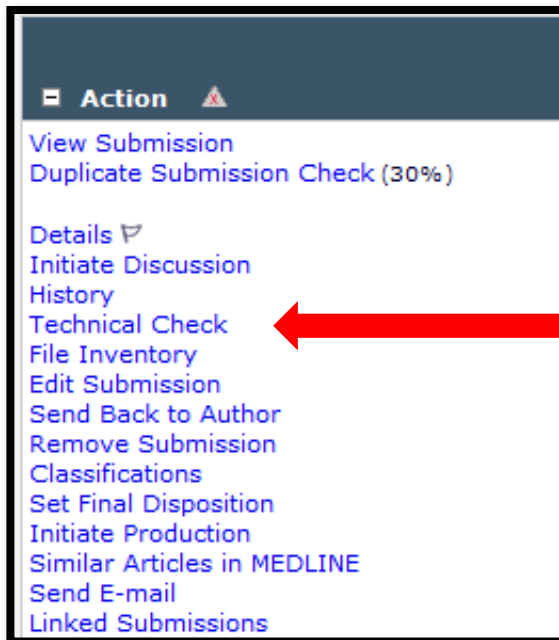
# Workflow Modifications

# Workflow Modifications

- Technical Check
- Assigning Editor Chains
- Modifying Editor Chains
- Direct-to-Editor
- “Skip” an editor in the decision chain

# Technical Check

- Technical Check is an opportunity for a publication to triage a submission prior to peer review to ensure compliance with standards set by the publication and to be sure the submission includes all publication requirements
- An editor with permission can complete the technical check



- When technical check is completed the technical check history is viewed using the “Technical Information” action link

# Technical Check

Technical Check for cbk15 -006

LPB

Original Submission

[View Submission](#)  
[Technical Check History](#)  
[Author Status](#)  
[Duplicate Submission Check \(30%\)](#)

Technical Check Incomplete  
 Technical Check Complete

Technical Comments to Author

[Insert Special Character](#)

Technical Notes

Display Technical Notes Flag [Insert Special Character](#)

- Enter the reason you are returning the submission in the “Technical Comments to Author Box”
- When it is determined that the submissions now meets your guidelines move the paper forward by selecting the “Technical Check Complete” radio button
- The paper moves to the “New submissions requiring assignment” folder

# Assign Editor Chain

**Define Initial Editor Assignment Chain**

	Step	
🗑️	Editor 1	Associate Editor Conference Editor <b>Editor in Chief</b> Editorial Assistant Managing Editor Section Editor Special Issue Editor Associate Editor
🗑️	Editor 2	
🗑️	Editor 3	

Associate Editor ▼ Add to

1. Choose a **Role**

**Editor**

▼

Editor Chief  
Wayne John  
[Editor Search](#)

2. Choose a **user** with selected Role

**Assignment Letter**





▼	None	
▼	<b>Editor Assignment</b>	Customize
▼	Editor Invitation	
▼	Editor Notice an Assignment was Undone	Customize
▼	Editor Assignment Undone	
▼	Editor Assignment - Proposal	
▼	Editor Invitation	Customize

3. Select and customize letter

# Add Editor Assignment Chain Template

## Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor Assignment Chain Template List		+ Add Another Editor Assignment Chain Template
	 <b>Standard Three Editor Chain</b>	
	  <b>Two Editor Chain for Rapid Reports</b>	
	  <b>Three Editor Chain for Invited Submissions</b>	
	  <b>Two Editor Chain for Rapid Communications</b>	
+ Add Another Editor Assignment Chain Template		



# Select 'Assignment Chain Template' per Article Type

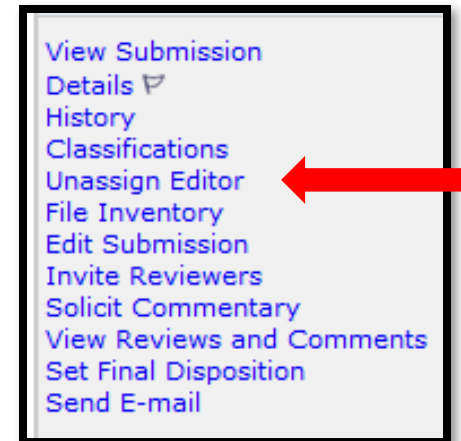
<b>Editor Parameters</b>	<b>New and Revised Submissions</b>
Editor Assignment Chain Template:	<div style="border: 1px solid black; padding: 2px;"><p>None</p><p><b>Standard Three Editor Chain</b></p><p>Two Editor Chain for Rapid Reports</p><p>Three Editor Chain for Invited Submissions</p><p>Two Editor Chain for Rapid Communications</p></div>
<b>Reviewer Parameters:</b>	<b>New and Revised Submissions</b>
Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.	<input type="text" value="2"/>

- Select a default template for the Article Type in policy manager



# Modify Editor Chain

- Editors may be removed or replaced for any step of the Editor Chain
- An Editor who has saved or submitted a decision can be replaced by another Editor with the **same Role**
- Under certain conditions, an Editor may be replaced by another Editor with a **different Role**
- Default or customized letters may be sent
- Replacement Editors inherit the history of the Editor they have replaced
- Modifications to the Editor Chain are visible on the Custom **Details** page, the **History** page and in Reports



# Modify Editor Chain

**Modify Editor Chain**

[View Reviews and Comments](#)

**Manuscript Number:**  
cbk15 -003

**Current Editor Assignment Chain**

Step	Assigned Editor	Role	New Editor
Editor 1	Ed Editor Editor	Editor	<input type="text"/> Cotterell Melanie Jones Jennifer

Changing to editor with the same role

**Name:** Melanie S Cotterell, LLB Hons [Proxy] (Replaced Ed Editor)

**Role:** Editor

**Date Assigned:** 30 May 2017

**Date Completed:**

**Elapsed Days:** 0

**Recommendation:**

Change showing on the details page

**Modify Editor Chain**

[View Reviews and Comments](#)

**Manuscript Number:**  
cbk15 -003

**Current Editor Assignment Chain**

Step	Assigned Editor	Role	New Editor
Editor 1	Ed Editor Editor	GWTG - Stroke	<input type="text"/> Smith Sam

Changing to an editor with a different role

# Modify Editor Chain

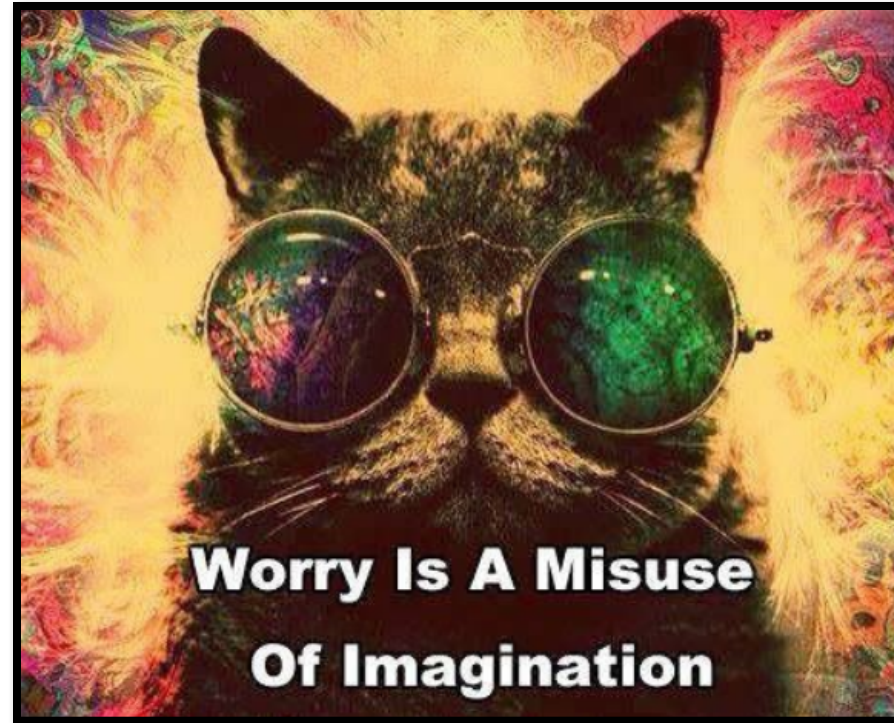


- Options depend on:
  - The logged-in user's *RoleManager* permission
  - The logged-in user's relationship to the submission and position in the Chain
  - Whether the Editor to be modified has saved or submitted a decision

# Modify Editor Chain

- Options also depend on:
  - Whether there are any unprocessed reviews
  - Whether another Editor in the Chain has submitted a decision
  - Whether another Editor in the Chain can still submit a decision





EM keeps track of the rules so you don't have to!

# Direct – To – Editor Workflow

**New Submission**

- ✓ Select Article Type
- ✓ Enter Title
- ✓ Add/Edit/Remove Authors
- Funding Information
- ➔ Select Section/Category
- Submit Abstract

**Please Select Section/Category**

Select the Section or Category related to your manuscript from the drop-down menu below.

Please Choose

- Submissions can be sent directly to Editors based upon the selection of sections/categories
- Can also be done based on Author choosing Editor

# Direct – To – Editor Workflow

**GWTC - Stroke Main Menu**

**Search**

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

**Editor 'To-Do' List**

My Pending Assignments (1)

**Direct-to-Editor Revised Submissions (1)**

New Assignments (0)

Submissions with Required Reviews Complete (0)

Submissions Requiring Additional Reviewers (0)

Submissions with One or More Late Reviews (0)

Reviews in Progress (0)

Reviewers Invited - No Response (0)

Submissions Under Review (0)

- The submission is delivered to Editor's "Direct-to-Editor" folder

**Direct-to-Editor Revised Submissions - Sam Smith**

**Contents:** These are the revised submissions which have been automatically directed to you. They require promotion to New Assignments or an Editor Redirection. Use the up/down arrows to change the sort order.

Page: 1 of 1 (1 total submissions) Display  results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Decision
<a href="#">View Submission</a> <a href="#">Details</a> <a href="#">Initiate Discussion</a> <a href="#">Classifications</a> <a href="#">File Inventory</a> <a href="#">Send Back to Author</a> <a href="#">Redirect to Other Editor</a> <a href="#">Assign to Myself</a> <a href="#">View Reviews and Comments</a> <a href="#">Send E-mail</a>	DEOMDG-81-3R1	Original Study	GWTC - CAD	Dianne's Great Idea	Arthur Author	16 Feb 2011	10 Mar 2017	Revised Manuscript Submitted	Article Idea Accepted

# Direct – To – Editor Workflow

## Edit Sections/Categories

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

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

	Section/Category Name	Responsible Editor		
↓	Stroke	Sam Smith	<a href="#">Remove</a>	<a href="#">Edit</a>
↓ ↑	Heart Failure	bob becker, PhD	<a href="#">Remove</a>	<a href="#">Edit</a>
↑			<a href="#">Remove</a>	<a href="#">Edit</a>

## Set Editor Assignment Options

### New Submissions

The settings below control how new manuscripts are assigned to Editors. The first choice, 'Submissions go to *New Submissions Requiring Assignment* folder' allows manual assignment of editors. The sub option "Submissions where Author has Selected an Editor" automatically directs the submission to the Editor selected by the Author at the 'Request Editor' manuscript submission step. The sub option 'Submissions where Author has Selected a Section/Category' automatically directs the submission to the Editor selected by the Author at the 'Select Section/Category' manuscript submission step.

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

Submissions go to *New Submissions Requiring Assignment* folder

Except:

Submissions where Author has selected an Editor  
*Please also configure settings on the 'Set Request or Assign Editor Display Options' page.*

Submissions where Author has selected a Section/Category  
*Please also assign Editors to sections on the 'Edit Sections/Categories' page.*

Policy Manager  
configurations



# Revised submissions can be automatically directed to the previous Editor

<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a> <a href="#">Rescind Decision</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEOMDG-81-23	Original Study	Workflow Revisions direct to previous editor	mary mary	15 Sep 2015	15 Sep 2015	Accept	Ed Editor	ASCE test accept
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Ed Editor makes a revise decision

Page: 1 of 1 (1 total revisions)      Display 10 results per page.

Action	Manuscript Number	Title	Date Revision Began	Date Revision Due	Current Status
<a href="#">View Revision</a> <a href="#">Edit Revision</a> <a href="#">Approve Revision</a> <a href="#">Decline to Revise</a> <a href="#">Send E-mail</a>	DEOMDG-81-23R1	Workflow Revisions direct to previous editor	19 May 2017	20 May 2017	Revision Needs Approval

Author submits revision

**Direct-to-Editor Revised Submissions - Ed Editor**

Contents: These are the revised submissions which have been automatically directed to you. They require promotion to New Assignments or an Editor Redirection. Use the up/down arrows to change the sort order.

Page: 1 of 1 (2 total submissions)      Display 10 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Decision
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Classifications</a> <a href="#">File Inventory</a> <a href="#">Send Back to Author</a> <a href="#">Assign to Myself</a> <a href="#">View Reviews and Comments</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a>	DEOMDG-81-23R1	Original Study		Workflow Revisions direct to previous editor	mary mary	15 Sep 2015	19 May 2017	Revised Manuscript Submitted	ASCE test accept

Revised submission sent directly to Ed Editor

# Revised submissions can be automatically directed to the previous Editor

### Set Editor Assignment Options

#### New Submissions

The settings below control how new manuscripts are assigned to Editors. The first choice, 'Submissions go to *New Submissions Requiring Assignment* folder' allows manual assignment of editors. The sub option "Submissions where Author has Selected an Editor" automatically directs the submission to the Editor selected by the Author at the 'Request Editor' manuscript submission step. The sub option 'Submissions where Author has Selected a Section/Category' automatically directs the submission to the Editor selected by the Author at the 'Select Section/Category' manuscript submission step.

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

- Submissions go to *New Submissions Requiring Assignment* folder
  - Except:
    - Submissions where Author has selected an Editor  
*Please also configure settings on the 'Set Request or Assign Editor Display Options' page.*
    - Submissions where Author has selected a Section/Category  
*Please also assign Editors to sections on the 'Edit Sections/Categories' page.*
  - Assign to Editor by Rotation  
*Please also select Editors on the 'Set Editor Rotation Participants' page.*

---

#### Revised Submissions

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

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

- Revisions go to *Revised Submissions or Revised Submissions Requiring Assignment* folder
  - Allow reassignment to previous Editors
    - Letter:
  - Revisions are automatically directed to the First Assigned Editor of the previous version.

# “SKIP” an Editor in the decision chain

**Editor Decisions**

Make a Decision

Terminate Outstanding Reviewer and Editor Assignments when Making a Decision

Skipped in Decision Chain if previous Editor's Decision IS

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

Notify Author after making a Decision

Draft Notification Letter for any decision

Send Any Notification Letter

Only Notify after selected decisions:

Decision Term	Decision Only	Draft	Draft and Send
Accept	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Revise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reject	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Article Idea Accepted	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- Configured in Role Manager

# “SKIP” an Editor in the decision chain

## Editor chain

Editors	
<b>Name:</b>	✉ mary mary ▾
<b>Role:</b>	Managing Editor
<b>Date Assigned:</b>	23 May 2017
<b>Date Completed:</b>	
<b>Elapsed Days:</b>	0
<b>Recommendation:</b>	
<hr/>	
<b>Name:</b>	✉ Ed Editor ▾
<b>Role:</b>	Editor
<b>Date Assigned:</b>	23 May 2017
<b>Date Completed:</b>	
<b>Elapsed Days:</b>	0
<b>Recommendation:</b>	

## Decision chain

Editors	
<b>Name:</b>	✉ mary mary ▾ [Proxy]
<b>Role:</b>	Managing Editor
<b>Date Assigned:</b>	23 May 2017
<b>Date Completed:</b>	23 May 2017
<b>Elapsed Days:</b>	0
<b>Recommendation:</b>	[Skipped] ←
<hr/>	
<b>Name:</b>	✉ Ed Editor ▾ [Proxy]
<b>Role:</b>	Editor
<b>Date Assigned:</b>	23 May 2017
<b>Date Completed:</b>	23 May 2017
<b>Elapsed Days:</b>	0
<b>Recommendation:</b>	Revise

Questions?



