Welcome to EEMUG 2017

13th Annual European Editorial Manager® User Group Meeting

Aries systems

I'll handle it...

Michaela Barton
12th January 2017

13th Annual European Editorial Manager® User Group Meeting

Aries systems

[I'll handle it!]

- Restricted File Types
- URL/ URI submission
- Two ways of dealing with .zip files
- Companion Files
- How to configure these file types by article type
- PDF Watermarks
- CheckCIF
- Reference checking
- Attachments

Restricted File Types

Submission Items

Why Restrict File Types?

- Publications can choose to restrict the types of files that the Author may submit on the 'Attach Files' page for New and Revised Submissions.

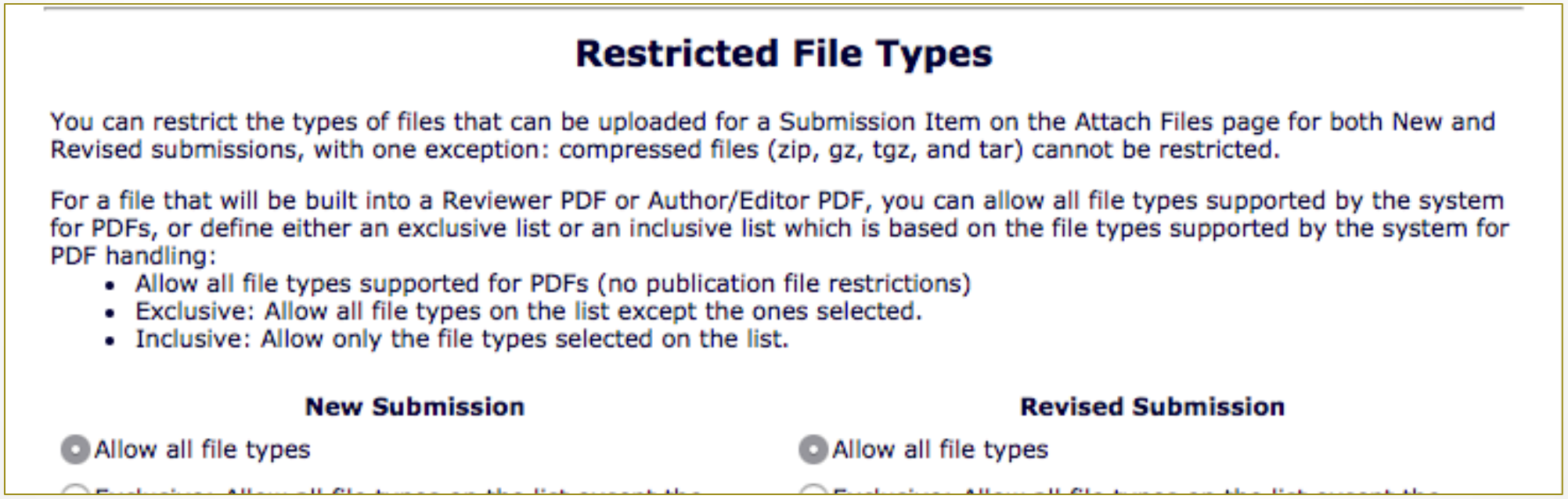
Options:

- Allow all file types (current, default functionality),
- Allow all file types with discrete exclusions ("Exclusive" multi-selector box),
- Allow only the selected file types ("Inclusive" multi-selector box) for the Author attaching the submission item on the 'Attach Files' page.

- Different restrictions may be placed on the Submission Item Type for New Submissions and Revised Submissions submitted to the publication.
- Editor or Publisher roles can be granted the ability to upload all file types for a restricted Submission Item, by enabling the the "Bypass 'Restricted File Types' Requirements" permission in RoleManager.

Restricted File Types

System Administration> Policy Manager > Submission Policies> Edit Submission Items



Restricted File Types

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

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

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

New Submission

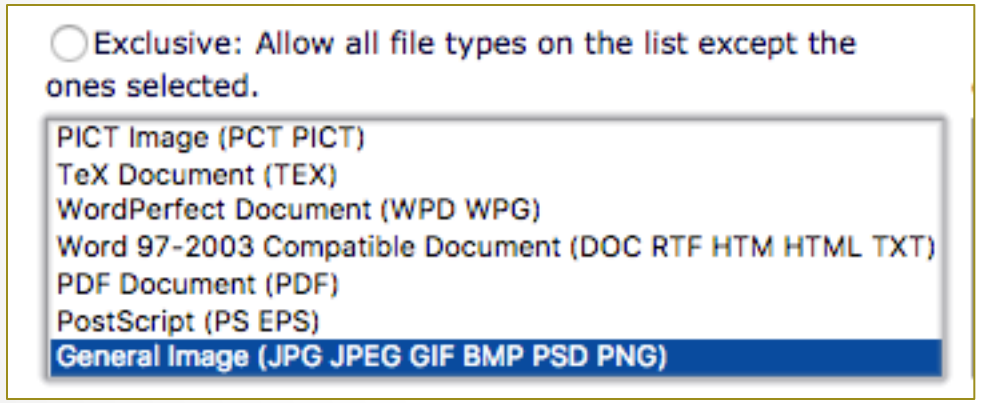
Allow all file types

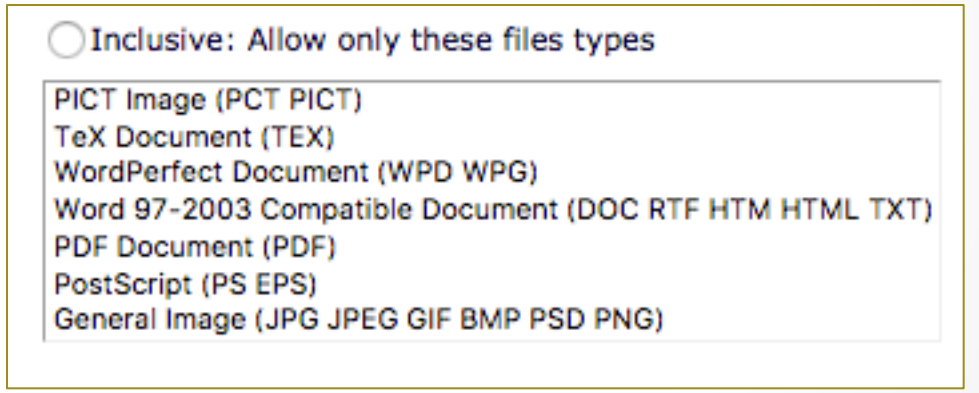
Revised Submission

Allow all file types

Restricted File Types

Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Submission Items





URL/ URI/ External Items for Submission

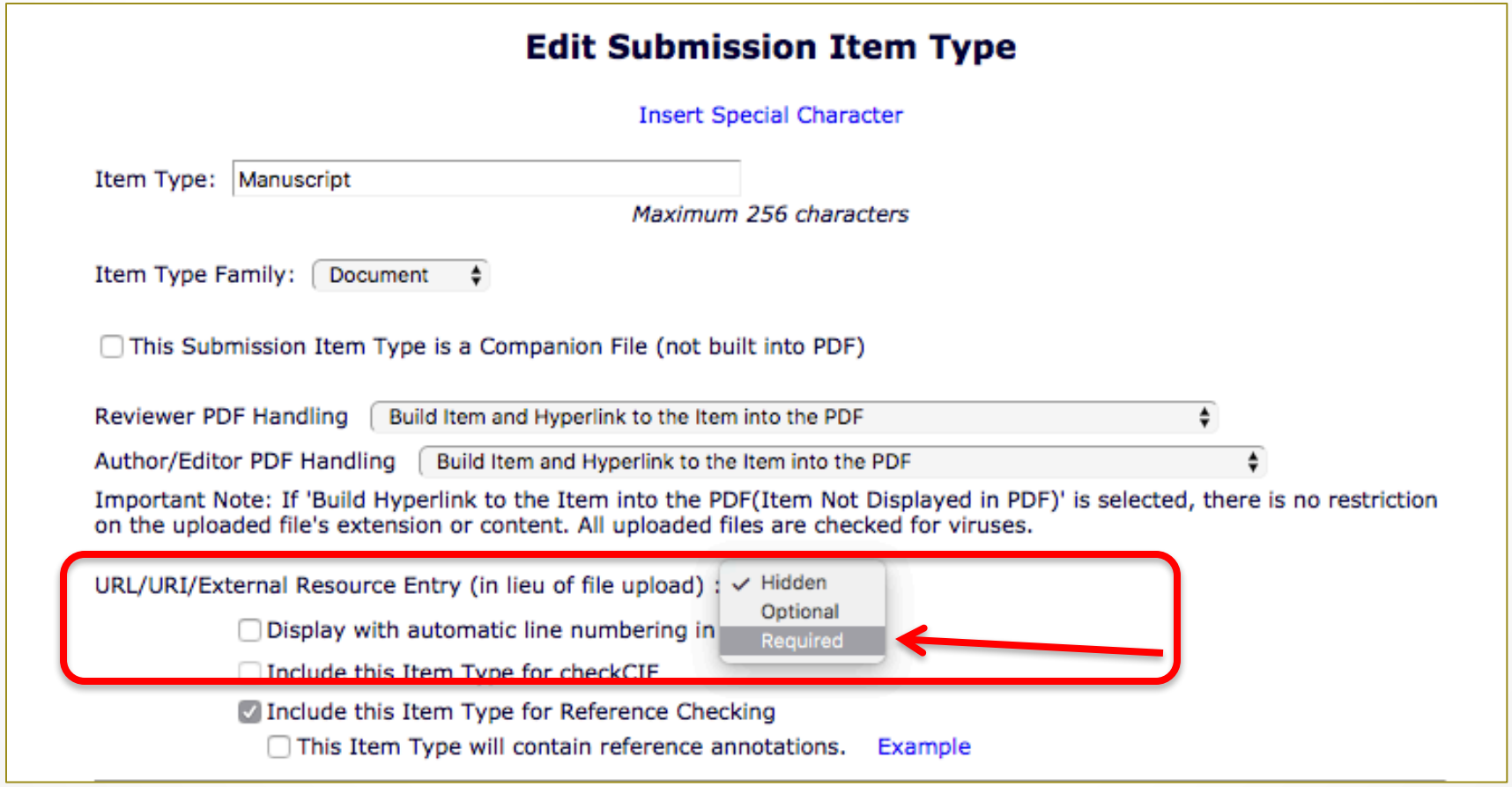
Submission Item Settings

What are URL/ URI / External Submission Items?

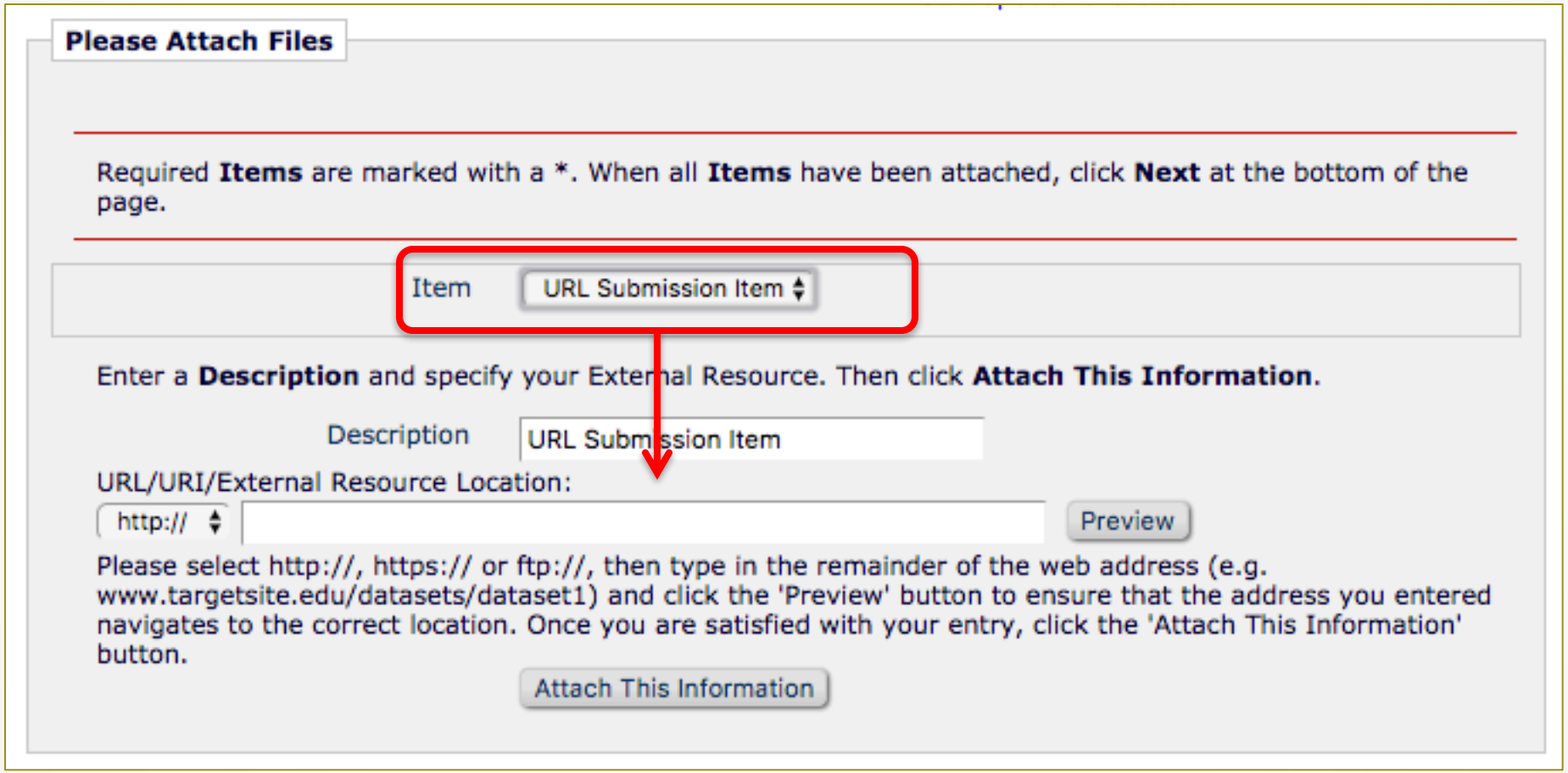
- This option allows Authors to enter a URI/URL address or external resource location (i.e. FTP)
- For accessing larger data sets (such as institutional repositories often housed at universities and other scientific institutions) or other data (such as videos) accessible via the Internet.
- If an Item is configured for the PDF Handling method "Build Hyperlink to the Item into the PDF", the name of the Item is shown at the top of the page in the PDF, followed by the full URL of the Item as a hyperlink on a new line.

URL/ URI Submission

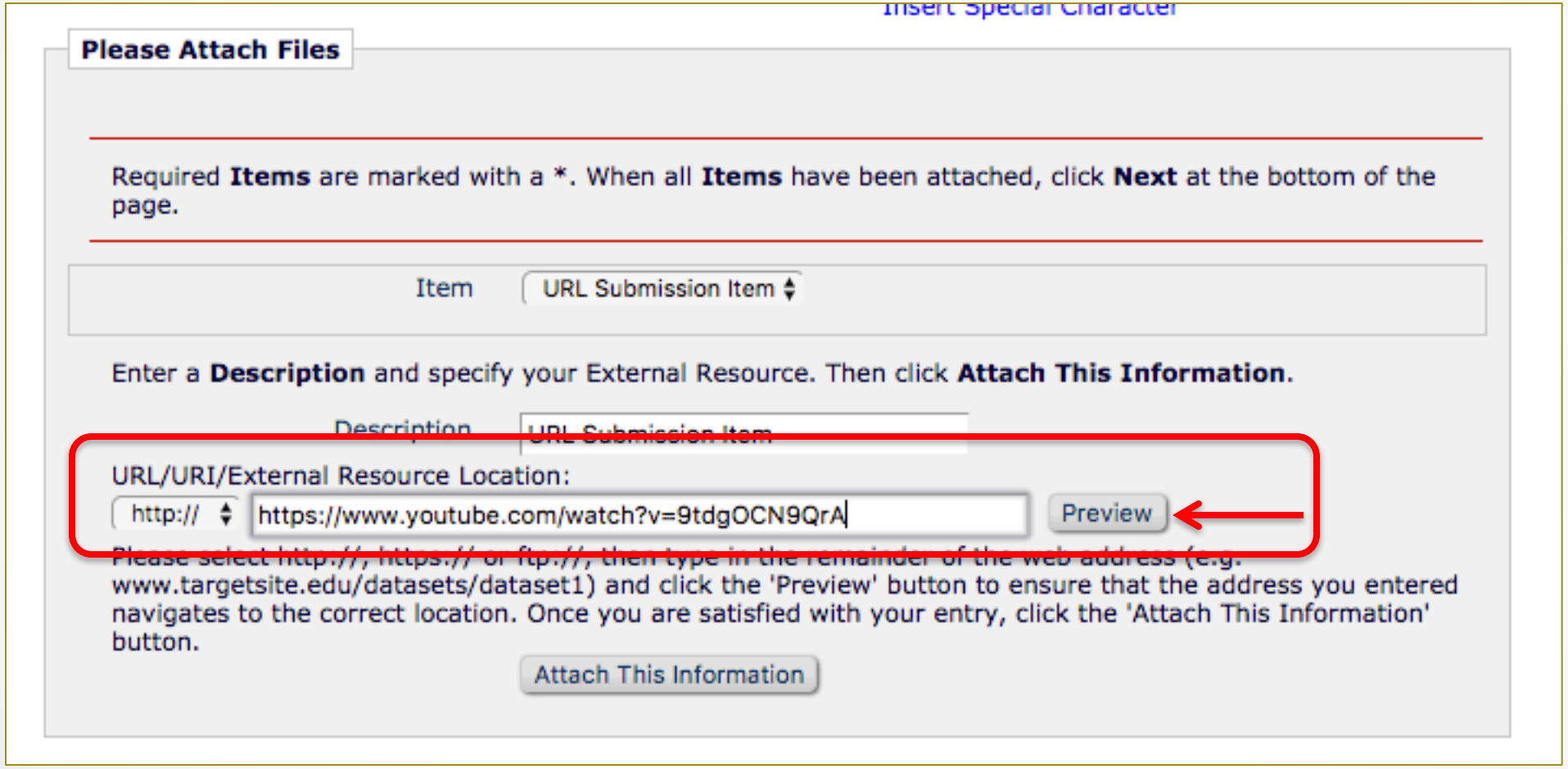
Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Submission Items



URL/URI / External Submission Item Types: During Submission



URL/URI / External Submission Item Types: During Submission



URL/URI / External Submission Item Types: During Submission

Change Item Type of all Choose files to Choose Change Now

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	Manuscript	Manuscript	I am a wonderful companion File8.docx	22.6 KB	22 Dec 2016	Download	
2	URL Submission Item	URL Submission Item	External Item		22 Dec 2016	Access Item	

Update File Order Remove

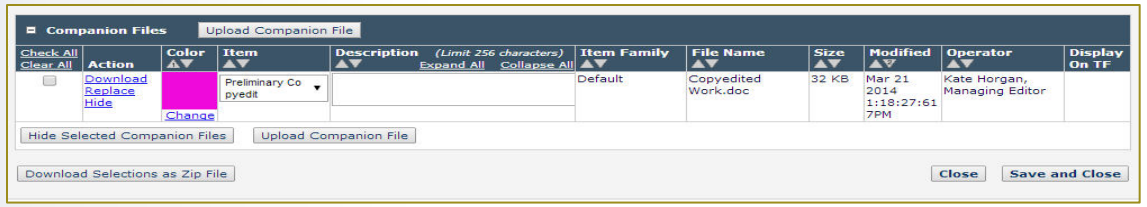
Check All Clear All

Click here to access/download
URL Submission Item
http://www.youtube.com/watch?v=9tdgOCN9QrA

Companion Files

Submission Item Settings

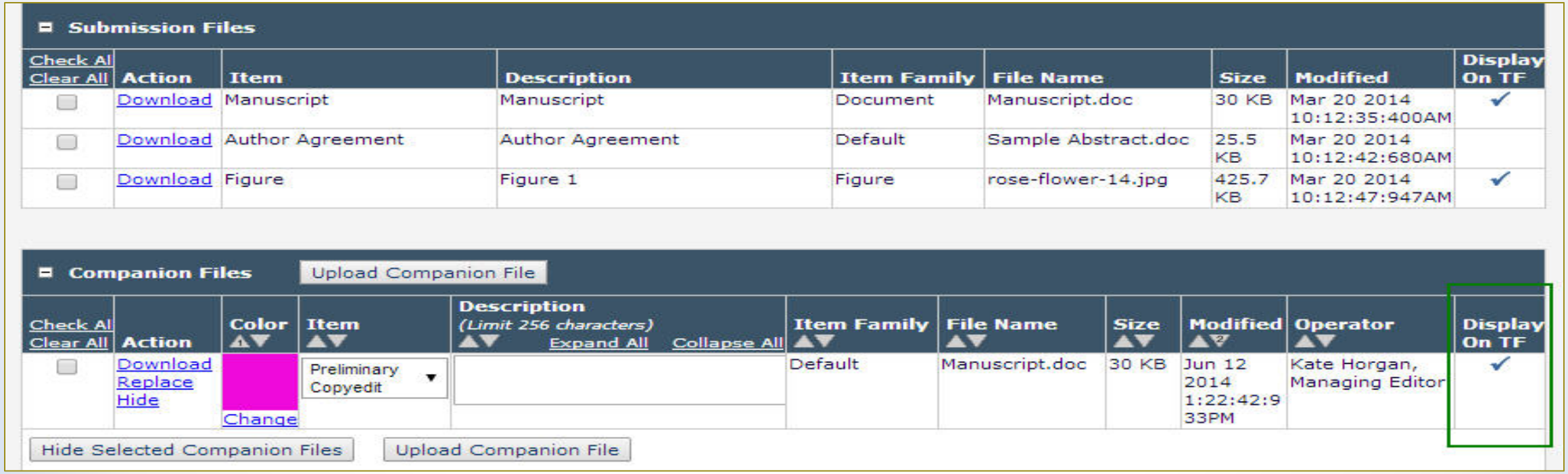
Companion Files



- Configure post-accept file(s) as companion files
- May be included in export to production vendor
- Colour coding for easy use
- Can replace as needed in File Inventory

Companion Files

Editor Main Menu> Folders > Manuscript> Action > File Inventory



Submission Files

Check All / Clear All	Action	Item	Description	Item Family	File Name	Size	Modified	Display On TF
☐	Download	Manuscript	Manuscript	Document	Manuscript.doc	30 KB	Mar 20 2014 10:12:35:400AM	✓
☐	Download	Author Agreement	Author Agreement	Default	Sample Abstract.doc	25.5 KB	Mar 20 2014 10:12:42:680AM	
☐	Download	Figure	Figure 1	Figure	rose-flower-14.jpg	425.7 KB	Mar 20 2014 10:12:47:947AM	✓

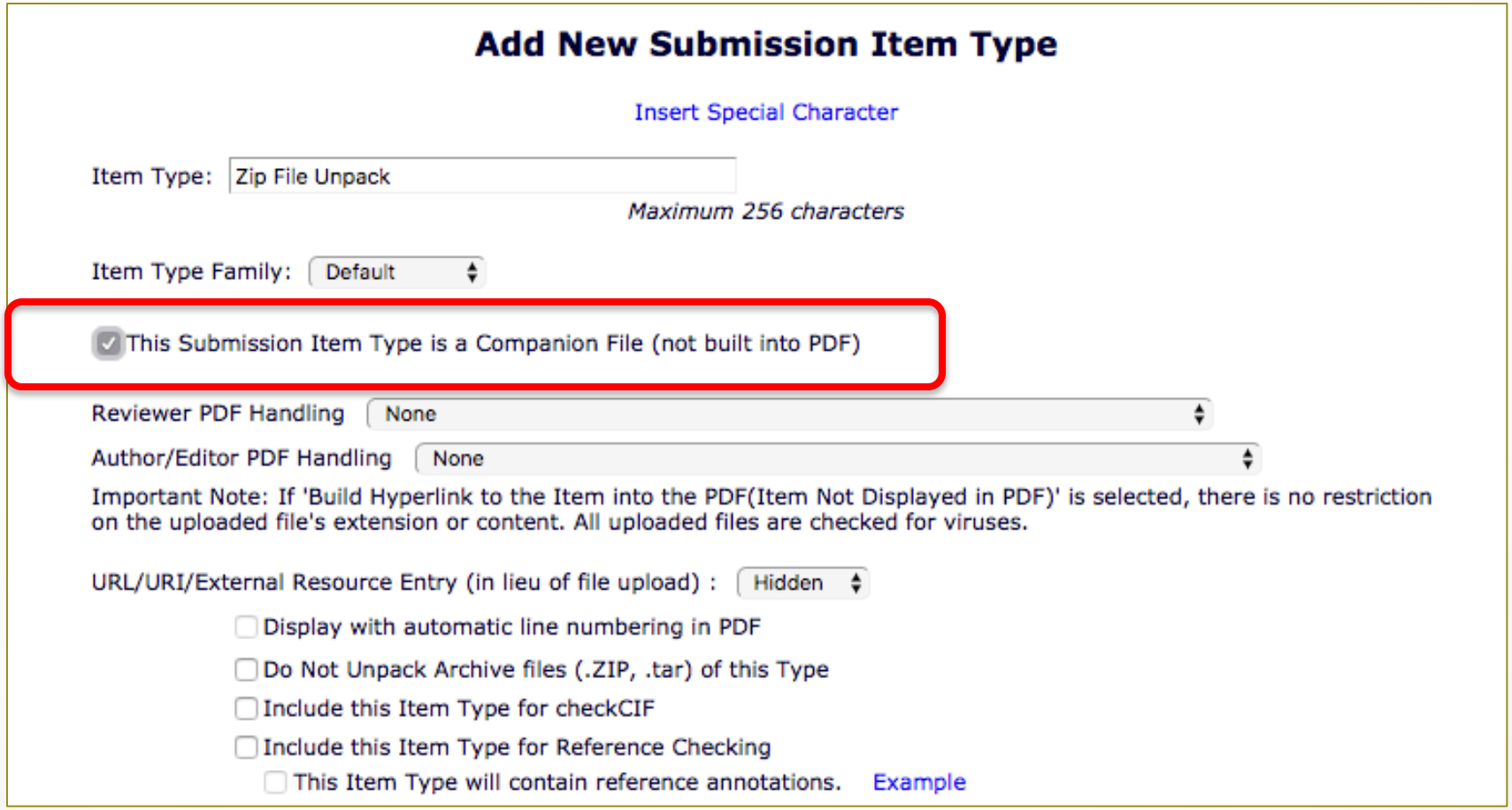
Companion Files Upload Companion File

Check All / Clear All	Action	Color	Item	Description (Limit 256 characters) Expand All Collapse All	Item Family	File Name	Size	Modified	Operator	Display On TF
☐	Download Replace Hide	Change	Preliminary Copyedit		Default	Manuscript.doc	30 KB	Jun 12 2014 1:22:42:933PM	Kate Horgan, Managing Editor	✓

Hide Selected Companion Files | Upload Companion File

[Companion Files]

Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Submission Items



[Colour Codes]:
For Companion Files

Editor Main Menu> System Administration> Policy Manager > Submission Policies> Configure color codes for companion files

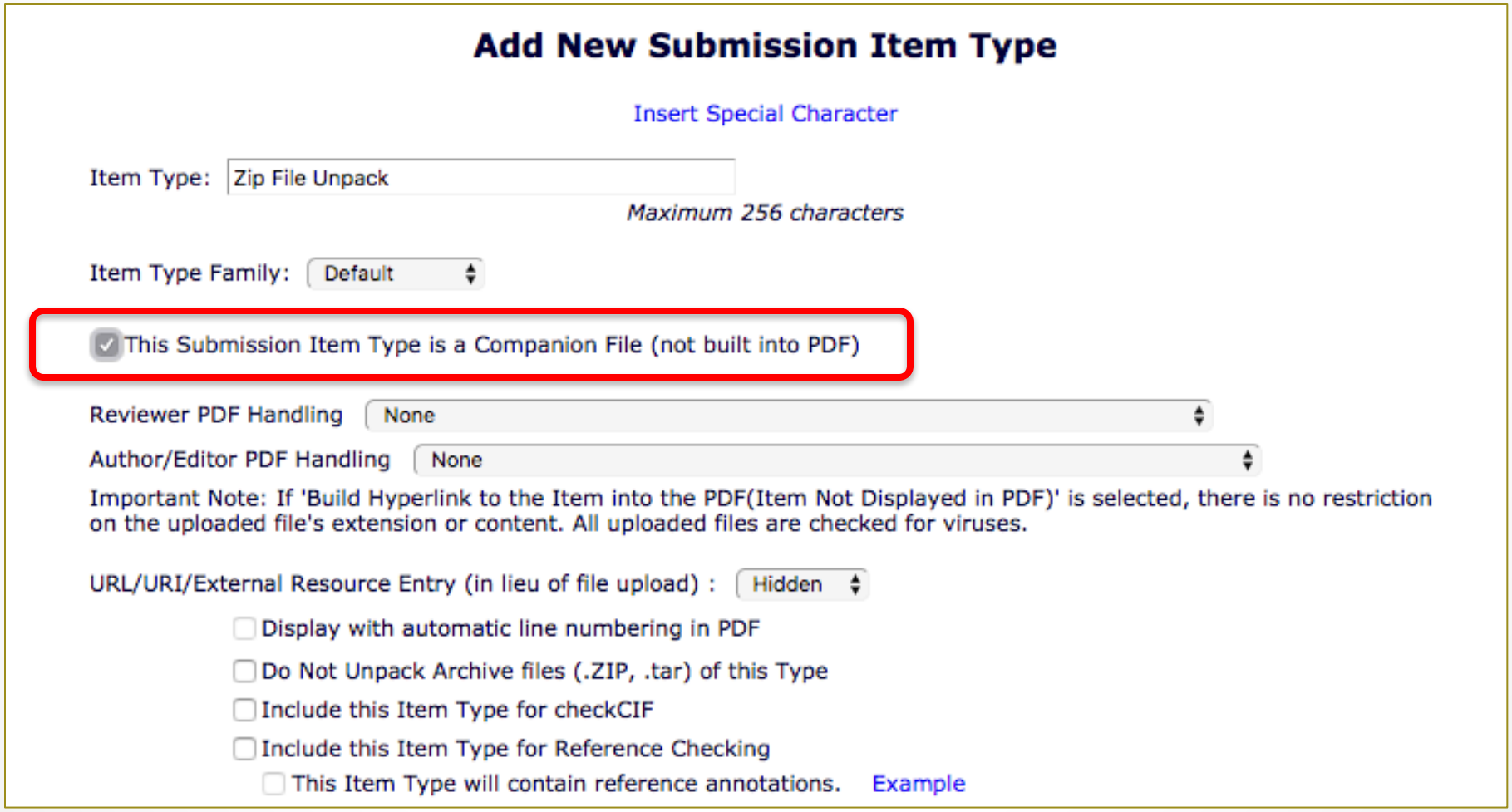
.ZIP files???

• • •

Submission Item Settings

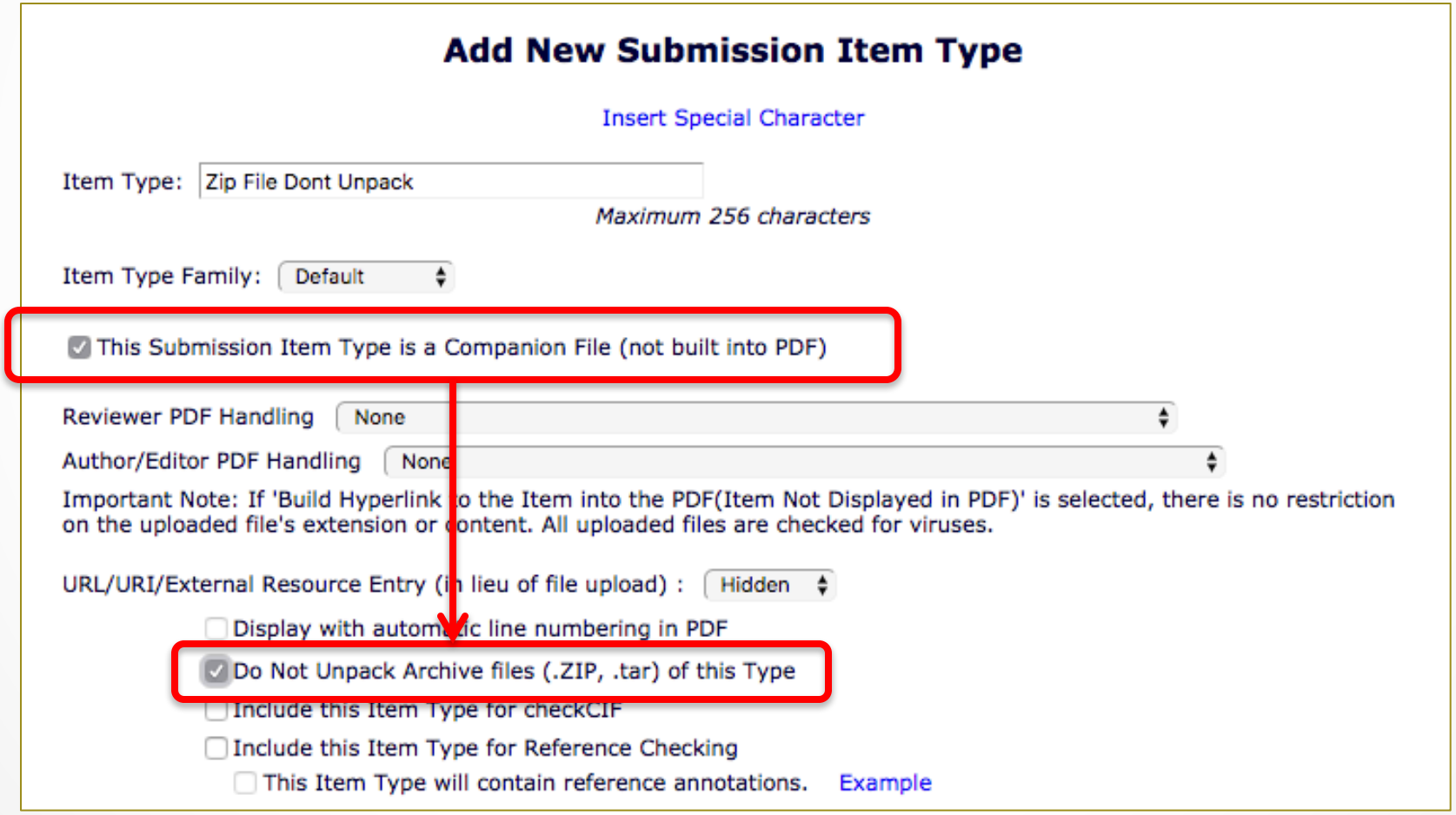
Managing .ZIP files

Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Submission Items



Managing .ZIP files

Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Submission Items



Uploading .ZIP files

Packed vs. Unpacked – during submission

Author Main Menu> Submit a Manuscript > Choose article type & type title> Attach Files step

3	Zip File Dont Unpack	Zip File Dont Unpack	Travel Images.zip	784.0 KB	22 Dec 2016	Download	
4	Choose		image10.jpeg	12.3 KB	22 Dec 2016	Download	
5	Choose		image11.jpeg	8.7 KB	22 Dec 2016	Download	
6	Choose		image12 .jpg	387.6 KB	22 Dec 2016	Download	
7	Choose		image13.jpg	362.2 KB	22 Dec 2016	Download	

PDF Handling

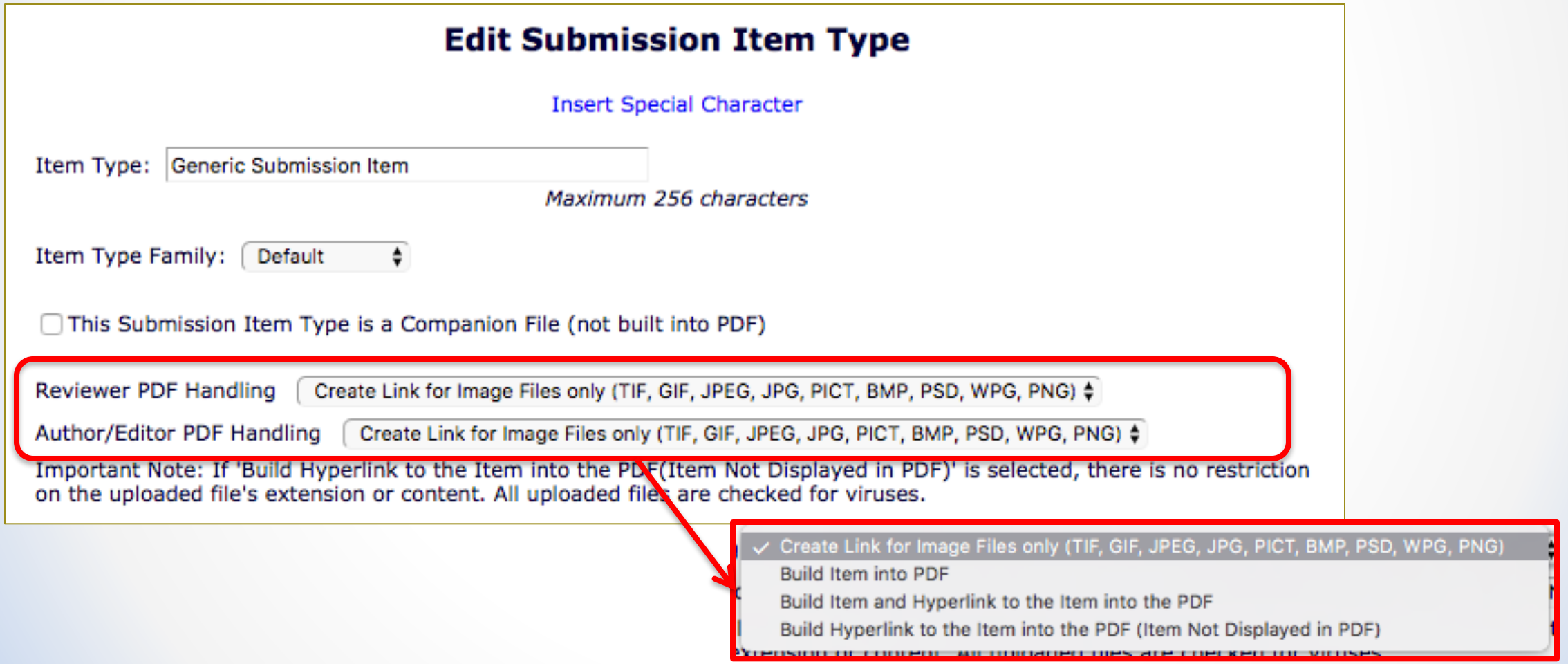
Submission Item Settings

PDF Handling

- Submission Items can be configured to display (or not display) in the submission PDF.
- Configuration determines how each Submission Item will display in the Author/Editor PDF as well as the Reviewer PDF.
- The option of having Submission Items handled differently in the Author/Editor PDF and the Reviewer PDF gives publications more control over what kind of information is accessible to users accessing the submission.

Configuring Submission Items: PDF Handling

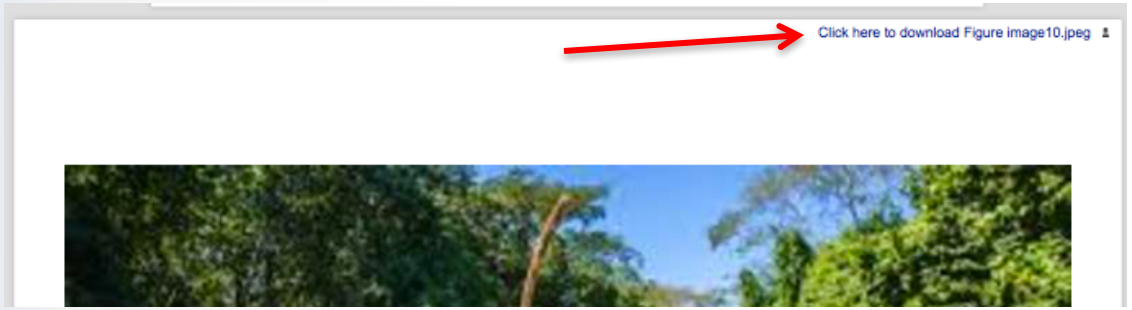
Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Submission Items



PDF Handling

How does each option show in the PDF?

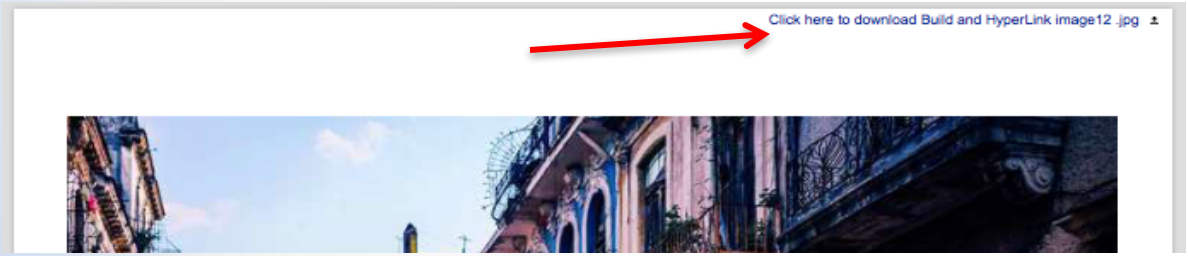
Create link for Image



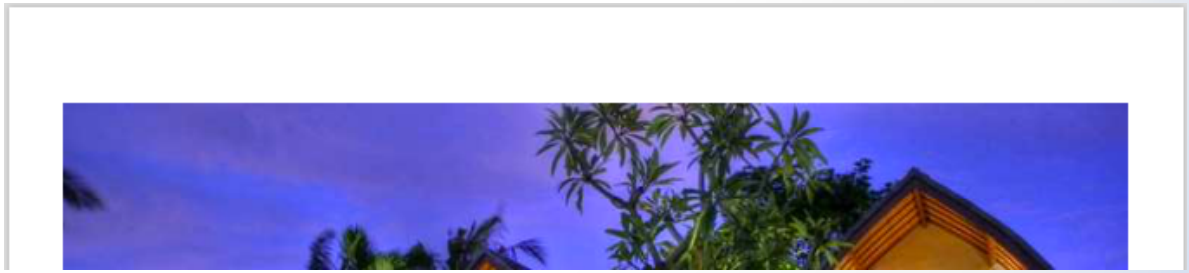
Build Hyperlink to the item into the PDF (item not displayed in PDF)

Click here to access/download
Hyperlink Dont Build
image11.jpeg

Build and hyperlink to the item into the PDF

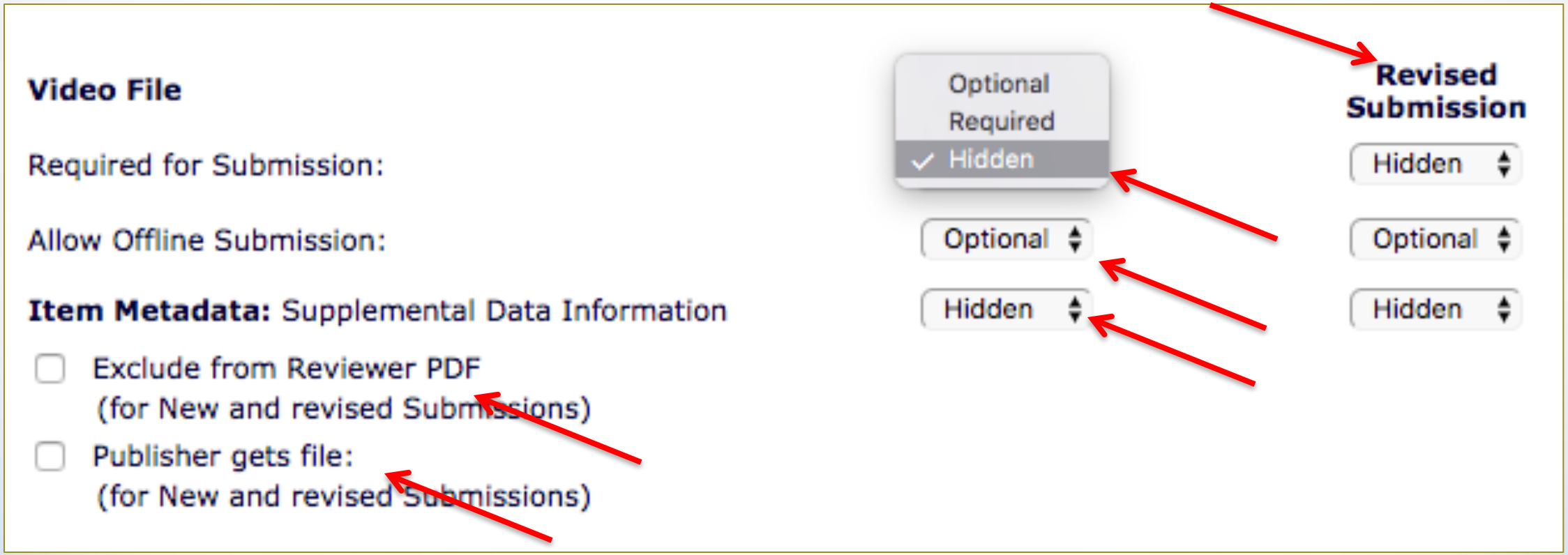


Build item into PDF



Configuring Submission Items:
Final Step - Configuring Article Types

System Administration> Policy Manager > Submission Policies > Edit Article Type > Submission Item Parameters



PDF Watermarks

PDF Watermarks

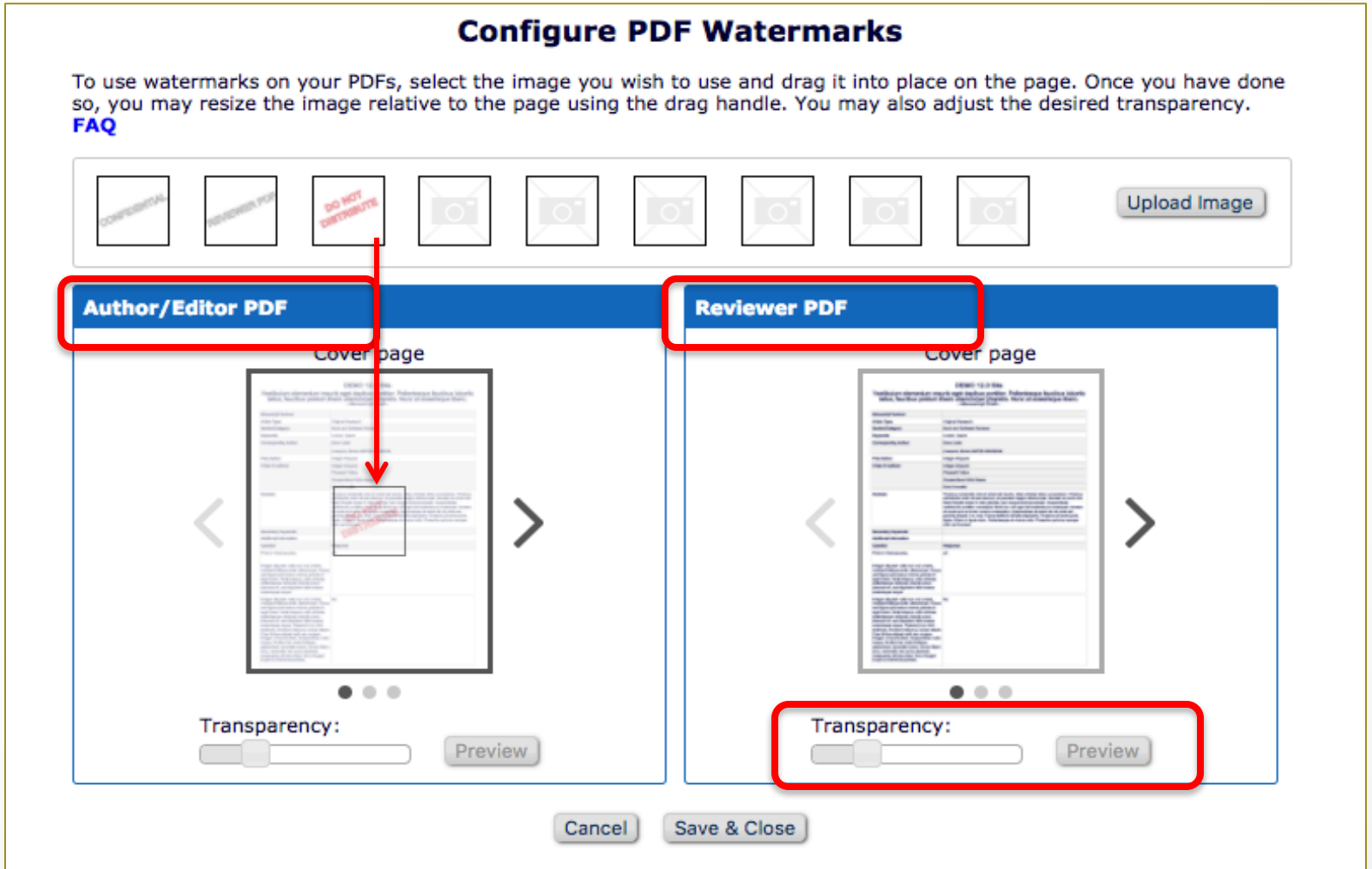
- Administrators can add "watermark" graphics to the PDFs that are built by the Editorial Manager system. This feature is great for publications that wish to brand their PDFs with publisher, society, or publication logos and messages.
- Upload images (up to 9 images may be in the image library at one time, and there is a 500KB size limit on the images)
- Choose one of the uploaded images to use for each of the following (if desired):

Author/ Editor & Reviewer PDFs

  - Cover Page
  - Body pages (portrait orientation)
  - Body pages (landscape orientation)
- Three "stock" watermark images are available for immediate use and convenience: "Confidential,", "Reviewer PDF," and "Do Not Distribute." Custom images can be uploaded by clicking the 'Upload Image' button.

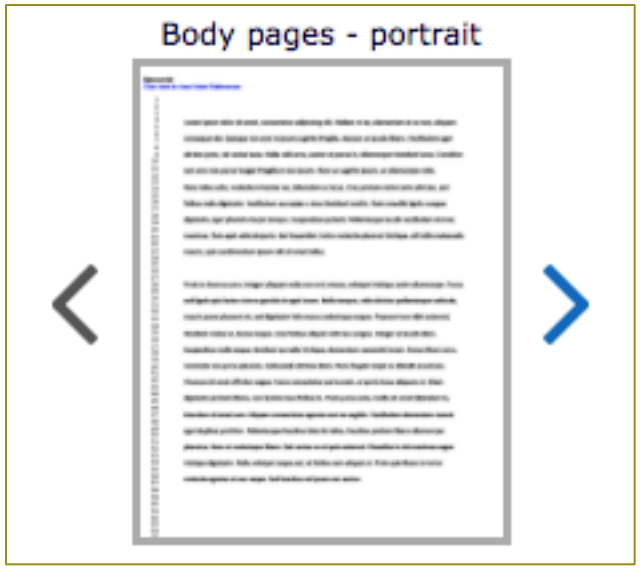
PDF watermarks

System Administration> Policy Manager > Submission Policies > Configure PDF Watermark



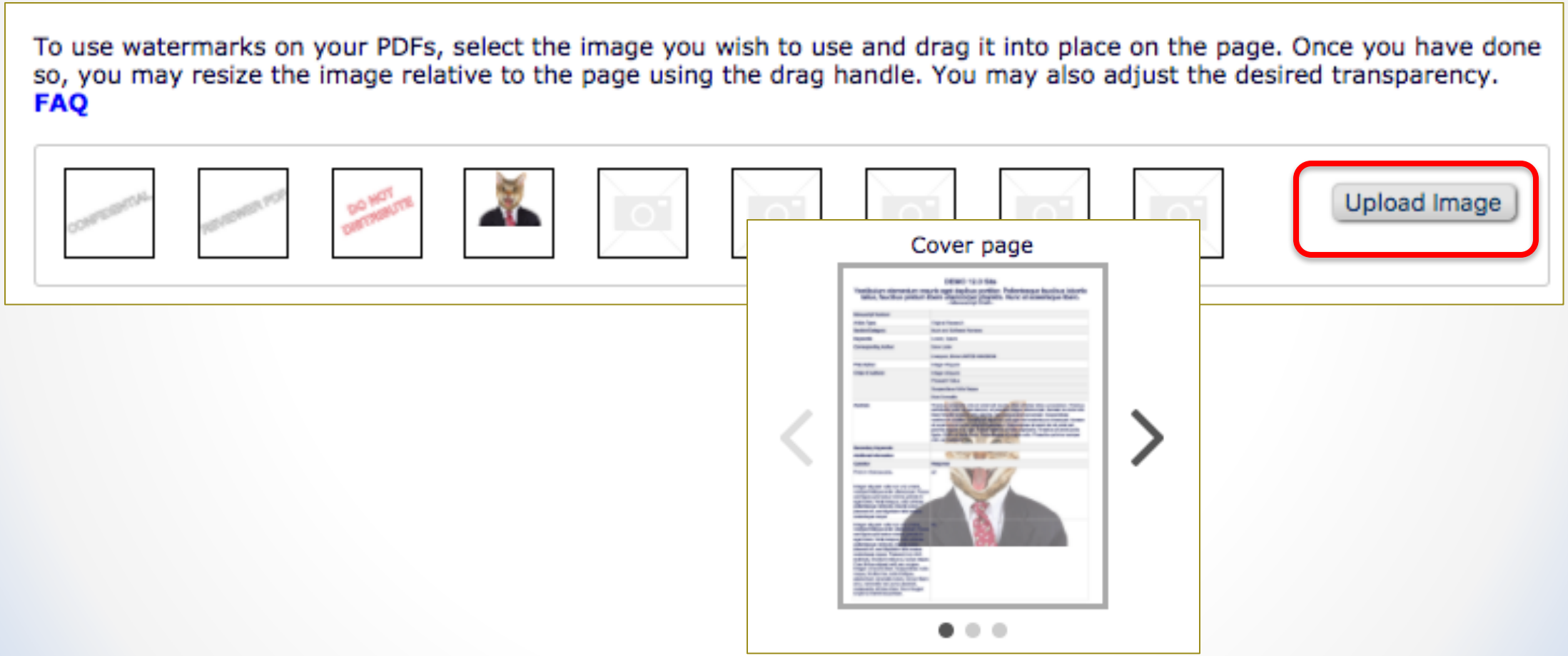
PDF Watermarks

System Administration> Policy Manager > Submission Policies > Configure PDF Watermarks



PDF Watermarks

System Administration> Policy Manager > Submission Policies > Configure PDF Watermarks

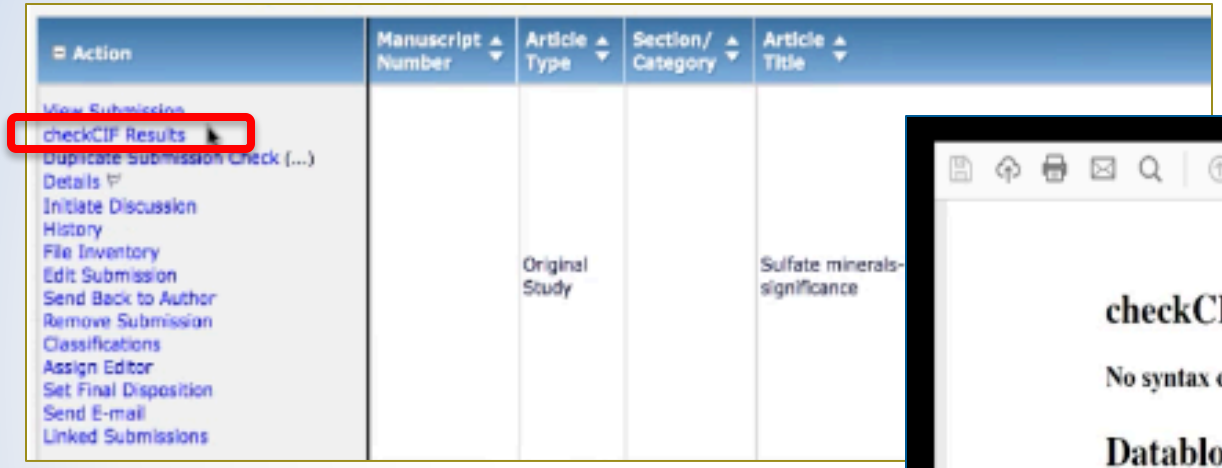


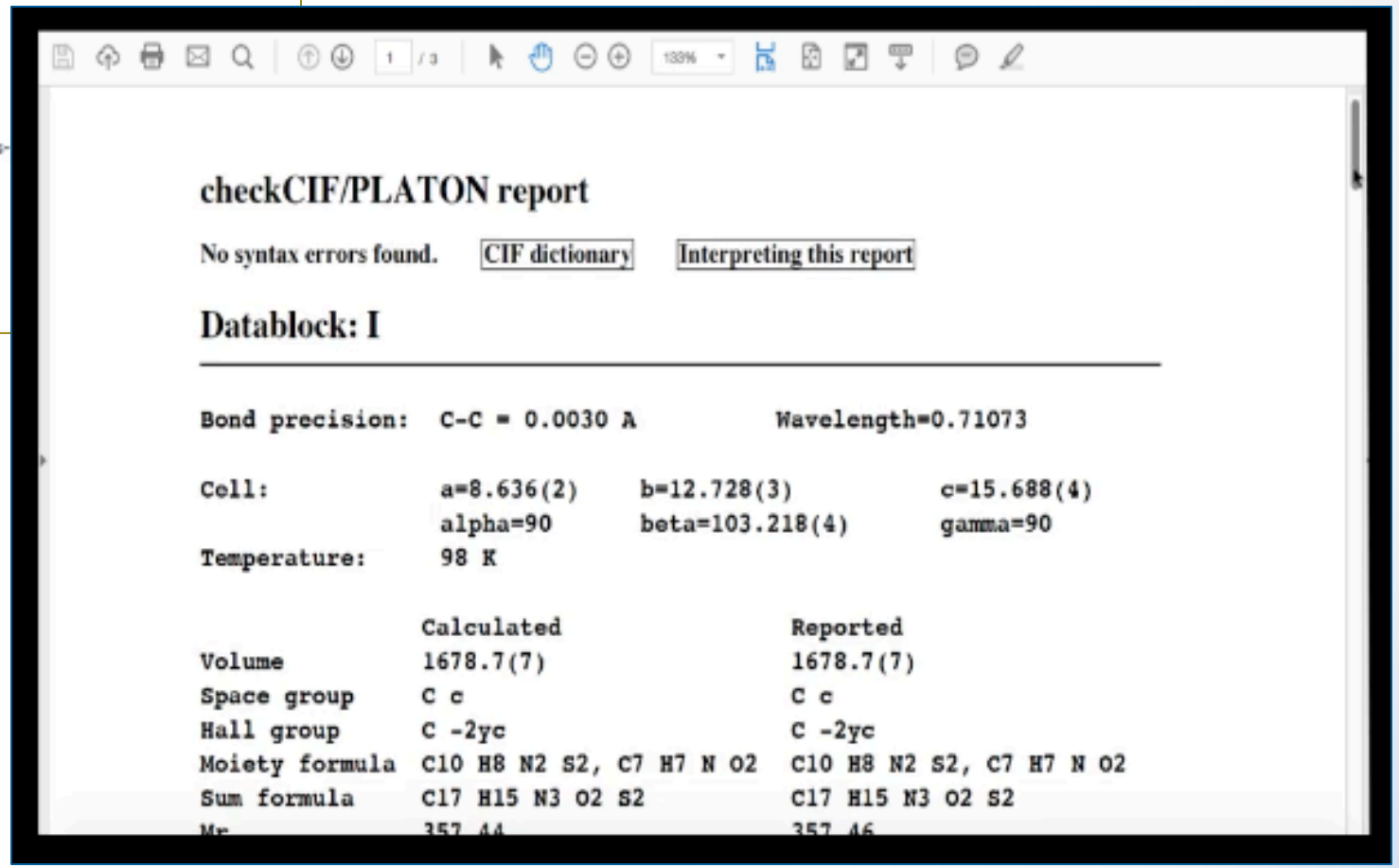
Configuring CheckCIF

What is: CheckCIF?

- CIF: Crystallographic information files.
- CIF files are structured text files containing crystallographic information.
- The CheckCIF tool reports on the consistency and integrity of crystal structures contained in the file.
- The tool is hosted by the IUCr (International Union of Crystallography).
- Once configured - CIF files are automatically processed by checkCIF in the background when a CIF file is uploaded on the attach files page.

CheckCIF: How it works?





checkCIF/PLATON report

No syntax errors found. CIF dictionary Interpreting this report

Datablock: I

Bond precision: C-C = 0.0030 A Wavelength=0.71073

Cell: a=8.636(2) b=12.728(3) c=15.688(4)
alpha=90 beta=103.218(4) gamma=90

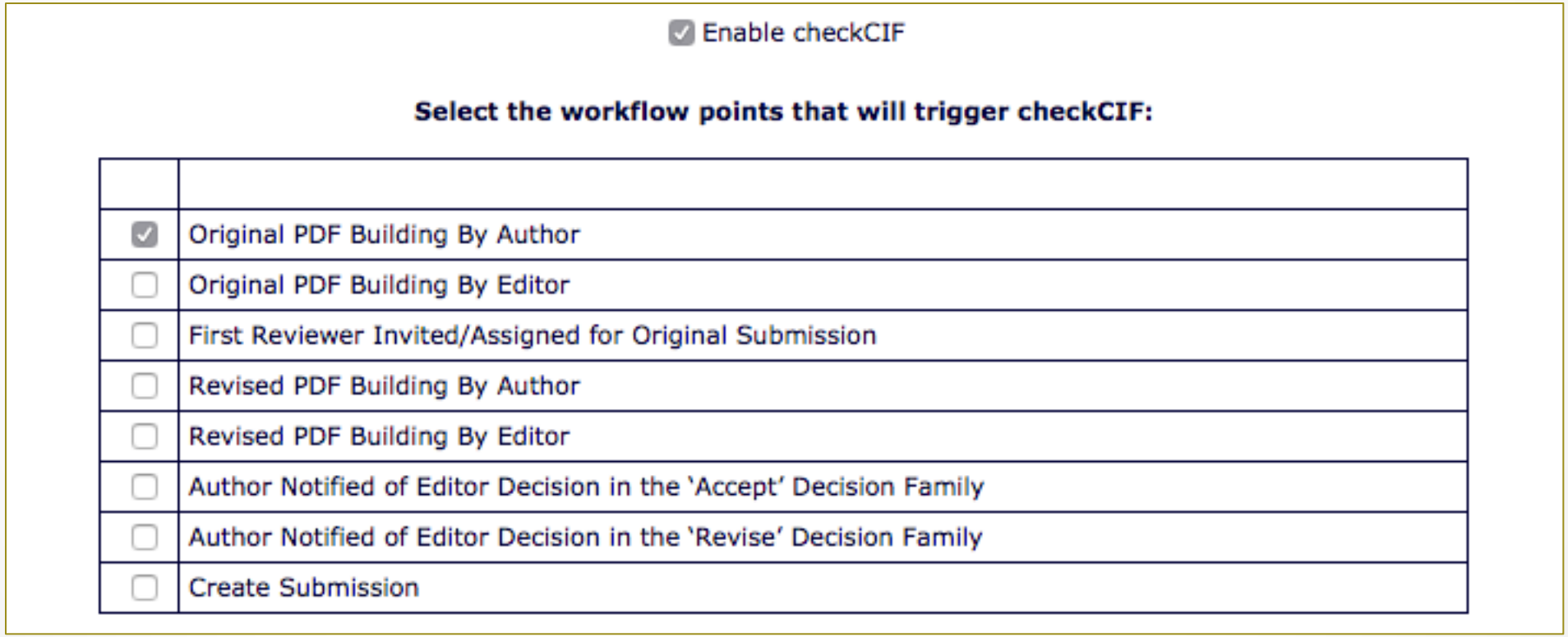
Temperature: 98 K

	Calculated	Reported
Volume	1678.7(7)	1678.7(7)
Space group	C c	C c
Hall group	C -2yc	C -2yc
Moiety formula	C10 H8 N2 S2, C7 H7 N O2	C10 H8 N2 S2, C7 H7 N O2
Sum formula	C17 H15 N3 O2 S2	C17 H15 N3 O2 S2
Mr	357.44	357.46

- Clicking the 'Completed' link in the checkCIF Results column will initiate the download of a PDF copy of the checkCIF results for that file.
- Clicking the 'Download' link allows the user to download the original .cif file.

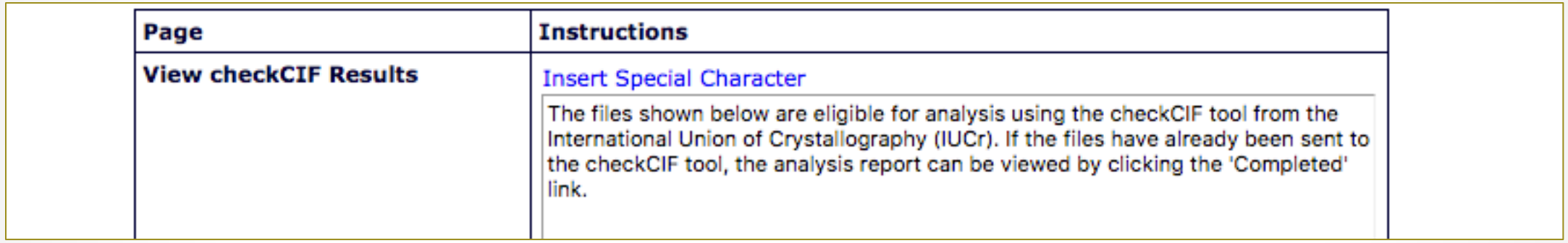
Configure CheckCIF:

System Administration> Policy Manager > Submission Policies > Configure checkCIF

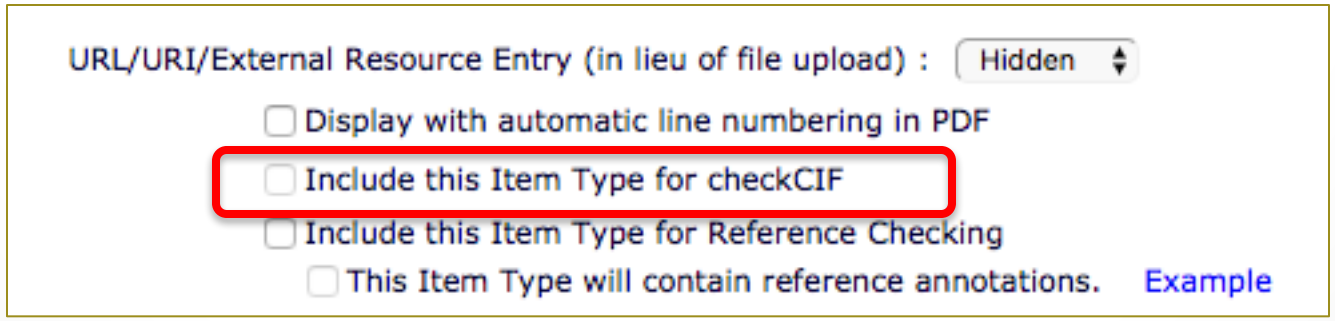


Configure CheckCIF:

System Administration> Policy Manager > Submission Policies > Configure checkCIF

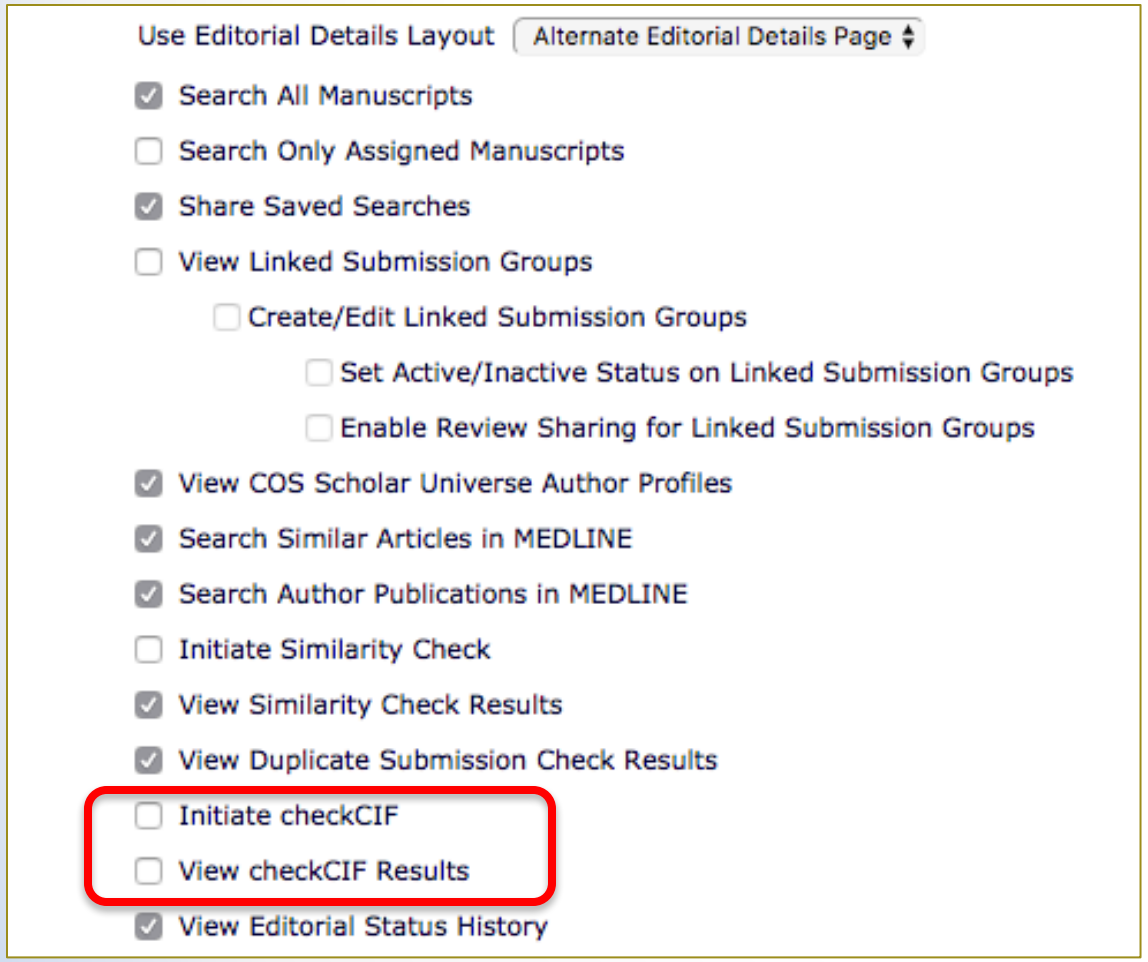


Editor Main Menu> System Administration> Policy Manager > Submission Policies> Edit Submission Items



Permissions: CheckCIF

Editor Main Menu> System Administration>Role Manager > Editor Roles > Edit > General Searching and Viewing



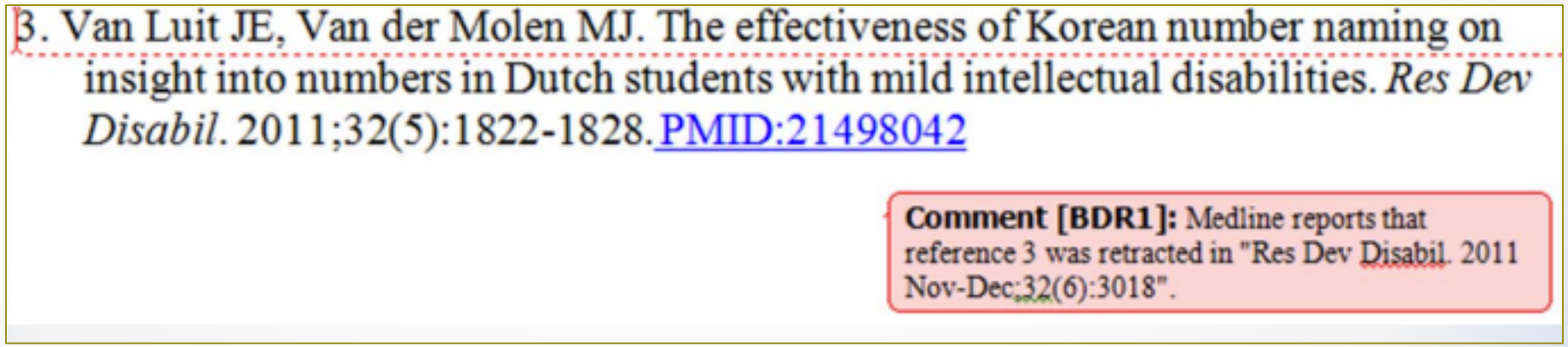
- Editor and Publisher Roles that have 'Initiate checkCIF' permission -will be able to select files to send to checkCIF by selecting the checkbox next to the item type and clicking the 'checkCIF: Selected Files' button.

Reference Linking, Checking and Mark- Up

eXtyles Product Sheet Link

References: Link / Check /Mark

- References Linked to PubMed/CrossRef
- Word Doc is marked-up with edits
- Missing data added, e.g. missing page numbers
- Inaccurate data corrected, e.g. author name misspelled
- DOI added
- Retractions identified:



References: Clean Up

- References are formatted to the correct journal style
- Out-of-the-box styles: APA, AMA, Chicago, ICMJE
- Custom journal styles available

BEFORE

3. Van Luit JE, Van der Molen MJ. The effectiveness of Korean number naming on insight into numbers in Dutch students with mild intellectual disabilities. Res Dev Disabil. 2011;32:1822.

AFTER

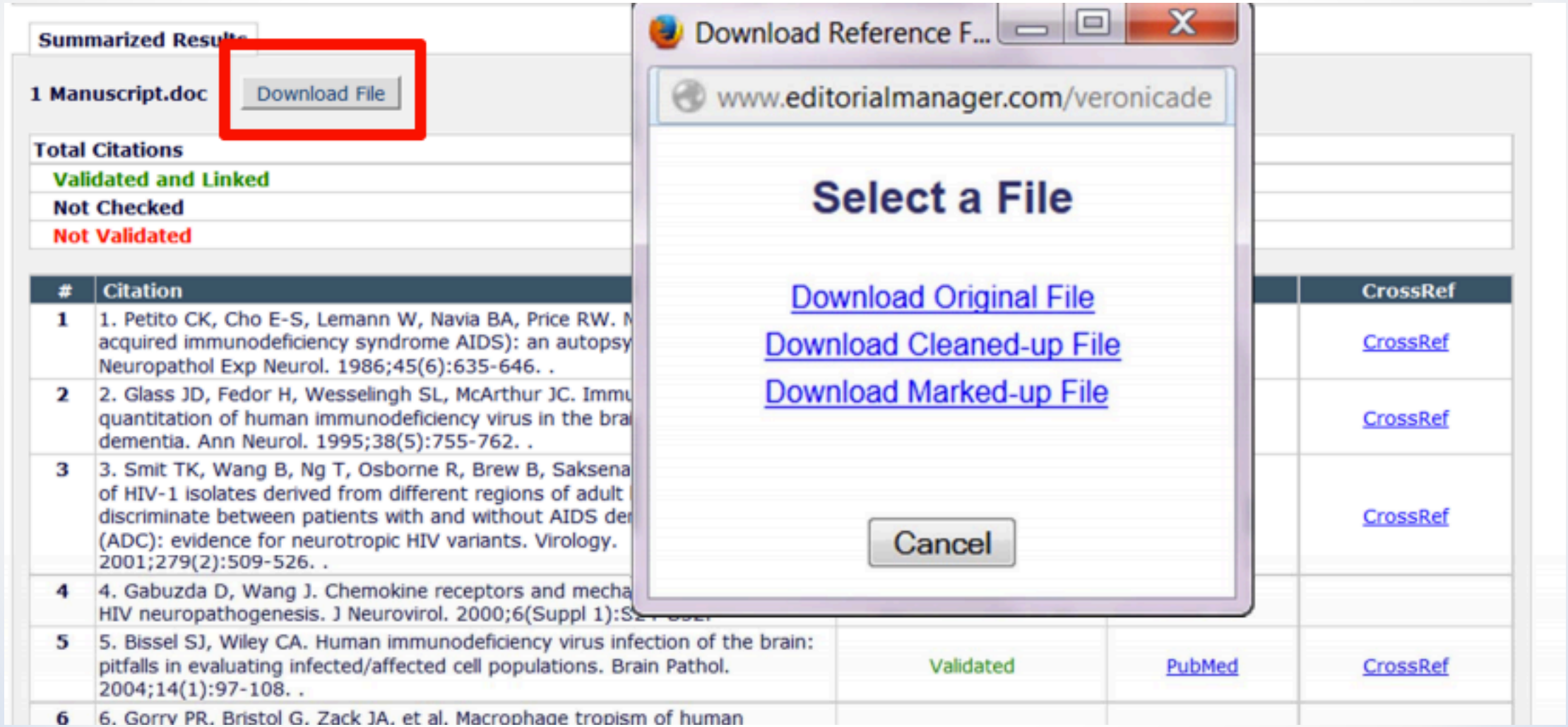
3. Van Luit JE, Van der Molen MJ. The effectiveness of Korean number naming on insight into numbers in Dutch students with mild intellectual disabilities. *Res Dev Disabil*. 2011;32(5):1822-1828.PMID:21498042

DIFFERENCE

3. ~~J. E.~~ Van Luit JE, ~~M.J.~~ Van der Molen MJ. The effectiveness of Korean number naming on insight into numbers in Dutch students with mild intellectual disabilities. Res~~.~~ Dev~~.~~ Disabil. 2011;32~~,:~~1822~~.~~(~~2011~~)

Reference Checking

Link Up/ Clean up / Mark Up



Reference Checking: Clean up

1. Access of Medicaid recipients to outp
   1994;330:1426-1430.
2. Alcohol-related traffic fatalities amor
   adults: United States, 1982-1989
   Rep. 1991;40:178-179,185-187.
3. Logan AG, Achber C, Milne BJ, Camp
   Site treatment of hypertension by
   controlled trial Lancet 1979:1175
4. Banit DM, Kaufer H, Hartford JM. Int
   analysis in revision total joint arth
   2002;(401):230-8.
5. M. G. Banwell, J. R. Dupuche, *Chem*
6. T.-J. Shen et al., *Protein Eng.* **38** (1
7. Curcio, F,, Pegoraro, I., Dello Russo,
   G., and Ceriello, A. SOD and GSH
   induced oxidative damage and th

<jrn>**1**. (1994). Access of Medicaid recipients to outpatient care. *The New England Journal of Medicine*, *330*, 1426–1430 doi:10.1056/NEJM199405193302007. Medline:8159198</jrn>

<jrn>**2**. (1991). Alcohol-related traffic fatalities among youth and young adults: United States, 1982-1989. *MMWR. Morbidity and Mortality Weekly Report*, *40*, 178–179, 185-187. Medline:1900563</jrn>

<jrn>**3**. Logan, A. G., Achber, C., Milne, B. J., Campbell, W. P., & Haynes, R. B. (1979). Work-Site treatment of hypertension by specially trained nurses A controlled trial. *Lancet*, *XXX*, 1175–1178 doi:10.1016/S0140-6736(79)92397-3. Medline:91901</jrn>

<jrn>**4**. Banit, D. M., Kaufer, H., & Hartford, J. M. (2002). Intraoperative frozen section analysis in revision total joint arthroplasty. *Clinical Orthopaedics and Related Research*, (401), 230–238 doi:10.1097/00003086-200208000-00026. Medline:12151900</jrn>

<jrn>**5**. Banwell, M. G., & Dupuche, J. R. (1996). *Chemical Communications (Cambridge)*, 869.</jrn>

<jrn>**6**. Shen, T.-J., et al. (1997). *Protein Engineering*, *38*, XXX.</jrn>

<jrn>**7**. Curcio, F., Pegoraro, I., Dello Russo, P., Falleti, E.,

Comment [BDR1]: CrossRef reports the author should be "The Medicaid Access Study Group" not "" in the reference 1 "Access of Medicaid recipients to, 1994".

Comment [BDR2]: The reference has no authors. Please proof carefully. (in reference 1 "Access of Medicaid recipients to, 1994").

Comment [BDR3]: The reference has no authors. Please proof carefully. (in reference 2 "Alcohol-related traffic fatalities among youth, 1991").

Comment [BDR4]: Please provide the missing volume number in this journal reference. (in reference 3 "Logan, Achber, Milne, Campbell, Haynes, 1979").

Comment [BDR5]: eXtyles has not found a volume number in the journal reference. Please check the issue/supplement information (":(401):") and update if necessary. (in reference 4 "Banit, Kaufer, Hartford, 2002").

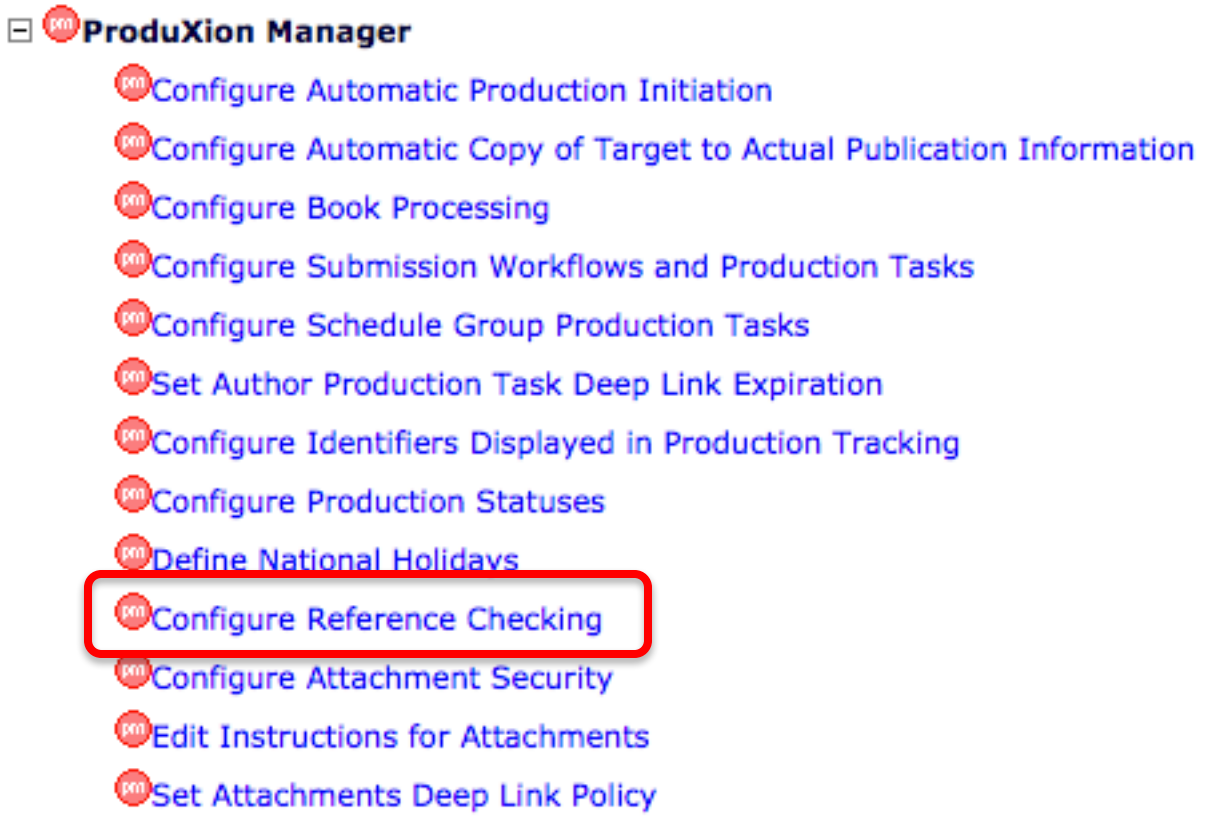
Comment [BDR6]: Medline cannot find the journal "Chemical Communications (Cambridge)" (in reference 5 "Banwell, Dupuche, 1996"). Please check the journal name.

Comment [BDR7]: The article title is missing from this reference. Please provide one. (in reference 5 "Banwell, Dupuche, 1996").

Comment [BDR8]: Reference has only first page number. Please provide the last page number if article is longer than one page. (in reference 5

Reference Checking: Configuration

System Administration > Policy Manager> ProduXion Manager > Configure Reference Checking



Reference Checking: Configuration

Editor Main Menu> System Administration> Policy Manager >ProduXion Manager> Configure Reference Checking

Select the method(s) for Reference Linking:

☑	Use PubMed ID
	☑ Display error messages on results page
	☐ PubMed Automatic Reference Correction (Add missing data only)
	☑ PubMed Automatic Reference Correction (Add missing data and replace incorrect data)
☑	Use CrossRef DOI
	☐ CrossRef Automatic Reference Correction (Add missing data only)
	☑ CrossRef Automatic Reference Correction (Add missing data and replace incorrect data)

Reference Checking: Configuration

Editor Main Menu> System Administration> Policy Manager >ProduXion Manager> Configure Reference Checking

Select the workflow points that will trigger Reference Checking:

No Reference Checking	Reference Linking Only	Reference Cleanup and Linking	
◉	○	○	Original PDF Building by Author
◉	○	○	Original PDF Building by Editor
◉	○	○	First Reviewer Invited/Assigned for Original Submission
○	○	◉	Revised PDF Building by Author
◉	○	○	Revised PDF Building by Editor
◉	○	○	Author Notified of Editor Decision in the 'Accept' Decision Family
◉	○	○	Author Notified of Editor Decision in the 'Revise' Decision Family
◉	○	○	Create Submission

Reference Checking: Configuration

Editor Main Menu> System Administration> Policy Manager >ProduXion Manager> Configure Reference Checking

Select whether the Author can carry forward the source file at time of Revision:

(If you select "Source file cannot be carried forward", the Author must download or view the results and upload a corrected file. If results are not yet available, or Reference Checking has not yet been triggered, the Author can carry forward the source file by default).

◉	Source file can be carried forward during Revision
	☐ Automatically replace original file with cleaned-up file.
○	Source file cannot be carried forward during Revision

Customize Instructions Displayed on the Reference Checking Results Page

To Authors:

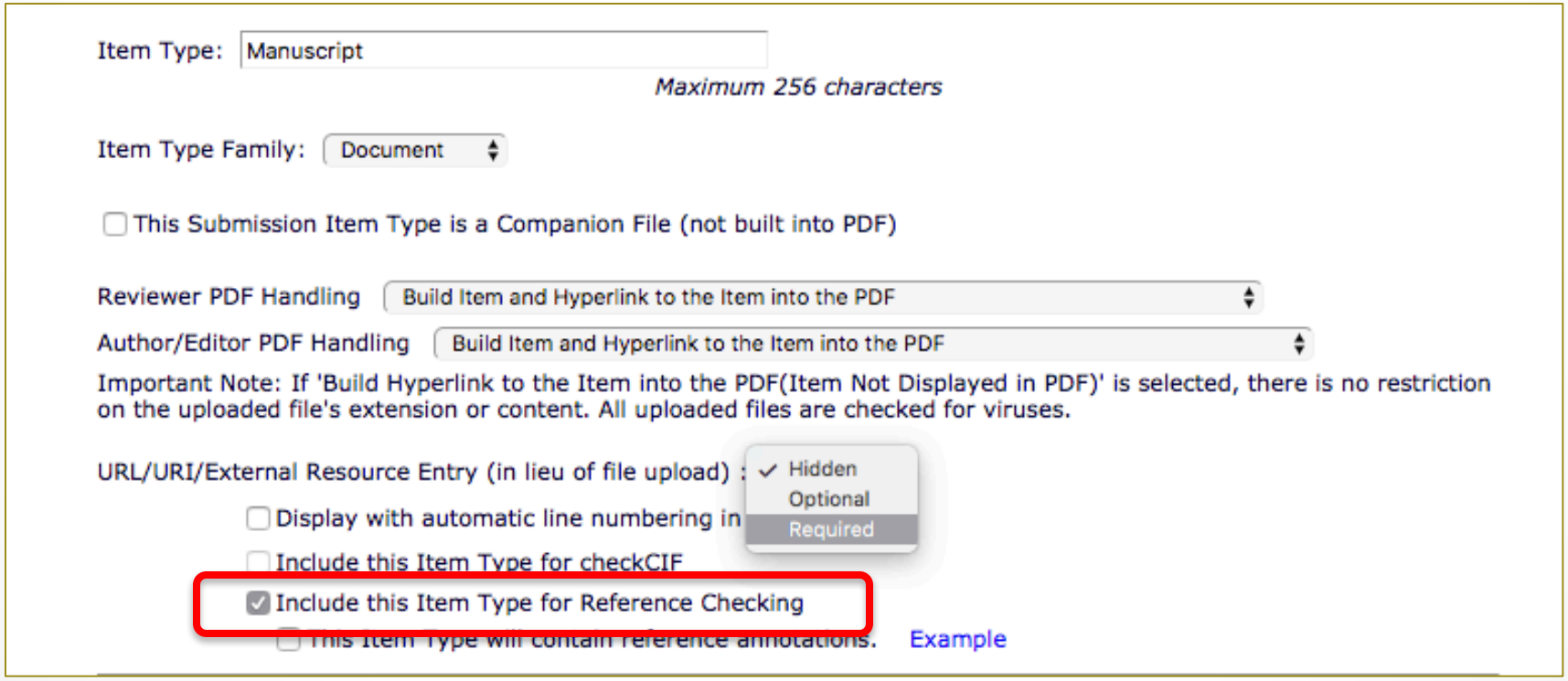
Line Wrap: soft ▲▼ Insert Special Character

Reference checking is done for journal citations. If the journal citation has a PubMed or CrossRef link, it has been validated. If 'Not Checked' is displayed, either the citation could not be identified as a journal citation, or the linking service did not return results. If 'Not Validated' is displayed, the journal citation could not be validated on the linking service.

View Default Instructions Revert to Default Instructions

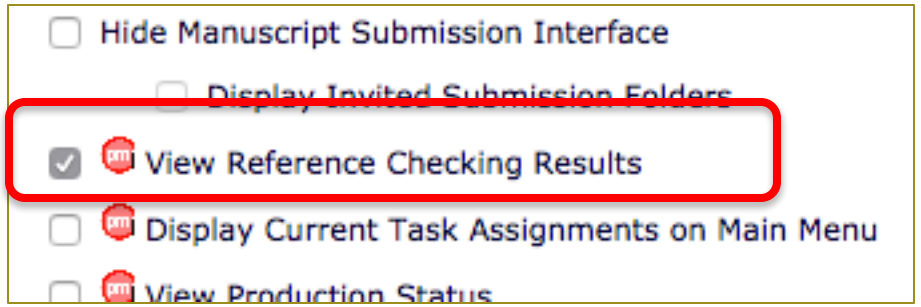
Configure: Reference Checking

Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Submission Items



Permissions: View Reference checking Results

System Administration> Role Manager> **Author or Reviewer or Editor** Role > View Reference Checking results:



For Authors, Reviewers and Editors – a permission is available in Role manager to allow them to "view reference checking results"

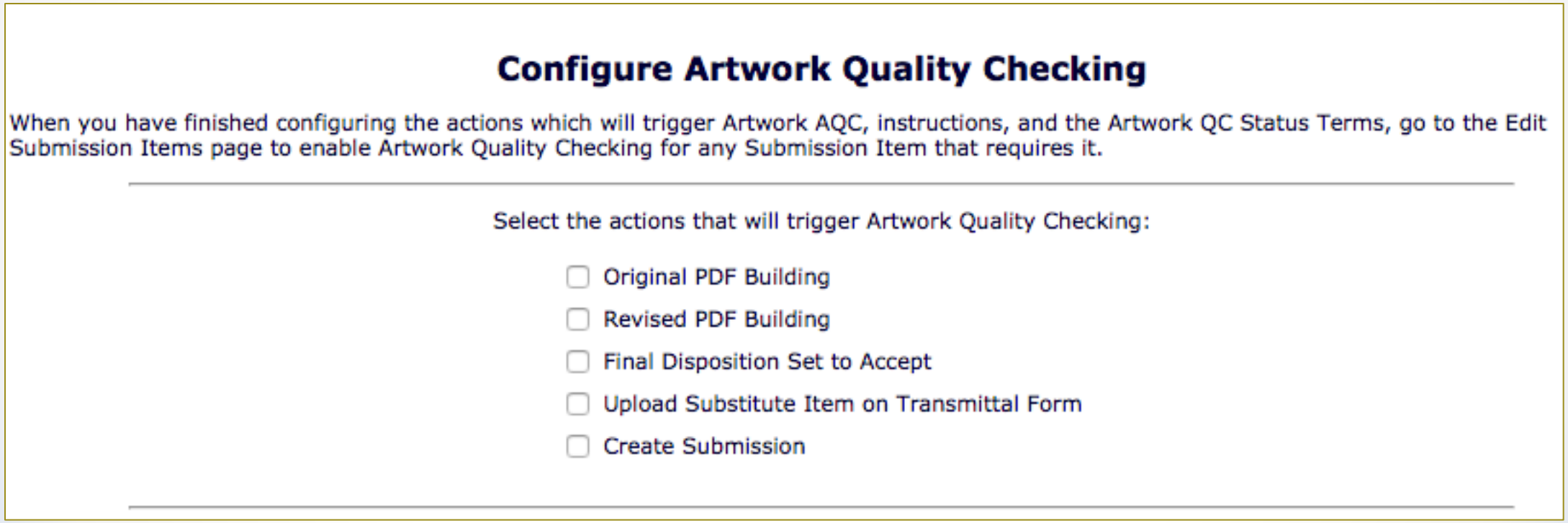
AQC

Artwork Quality Check

- Editorial Manager works third-party, on-line artwork checking tools which analyse the suitability of files for print or web reproduction.
- Enabled for you by your AC
- Once configured - Files are sent to the third party system for checking against a standard profile; that system returns a detailed report on problems with the files, with an overall pass/fail/warning result.
- These results are then made available to the Author and/or Editor on designated pages, and to the Editor on the Transmittal Form.
- Helps to highlight files that may cause problems later providiing the opportunity to source improved files at an early stage, reducing the time to publication.
- AQC can be configured to be carried out at several stages in the process, from initial submission, through submission of revised versions to final acceptance.

Artwork Quality Check

System Administration> Policy Manager> ProduXion Manager > Configure Artwork Quality Checking



Artwork Quality Check

System Administration> Policy Manager> ProduXion Manager > Configure Artwork Quality Checking

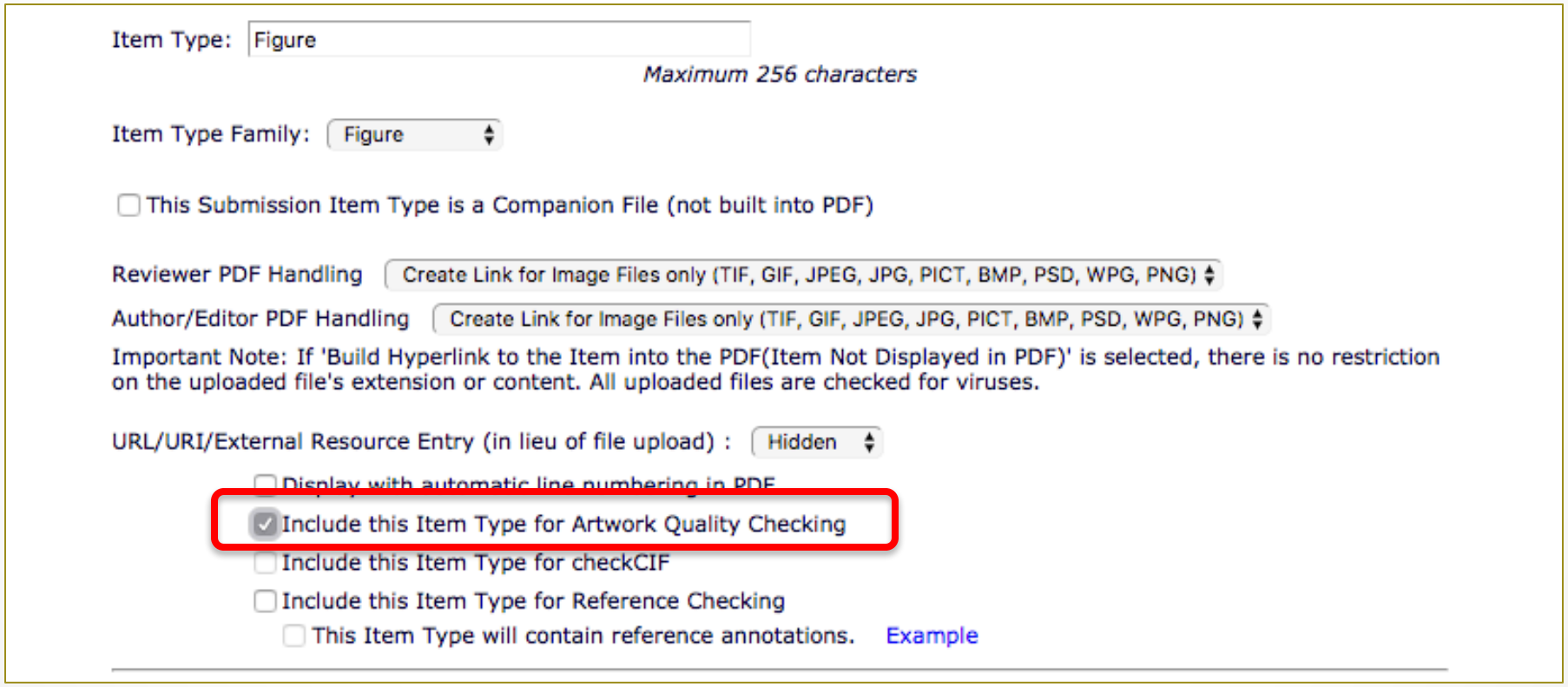
Configure the Artwork QC Status Terms, and map them to the appropriate Artwork QC Status Family. The customized AQC Status Terms are displayed to users on the Artwork QC Results page. There is a maximum of 256 characters allowed for each Status Term.

AQC Status Family	AQC Status Term (text)	AQC Status Term (HTML)
N/A	N/A	{0}
Testing in Progress	Testing in Progress	{0}
Pass	Pass	{0}
Fail	Fail	{0}
Pass with Warning	Pass with Warning	{0}
Error	Error	{0}
Untested	Untested	{0}
Untested (File Too Large)	Pass (indicated by file size)	{0}
Unsupported	Unsupported	{0}

Insert Special Character

Artwork Check

Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Submission Items



CrossCheck Integration

CrossCheck Integration

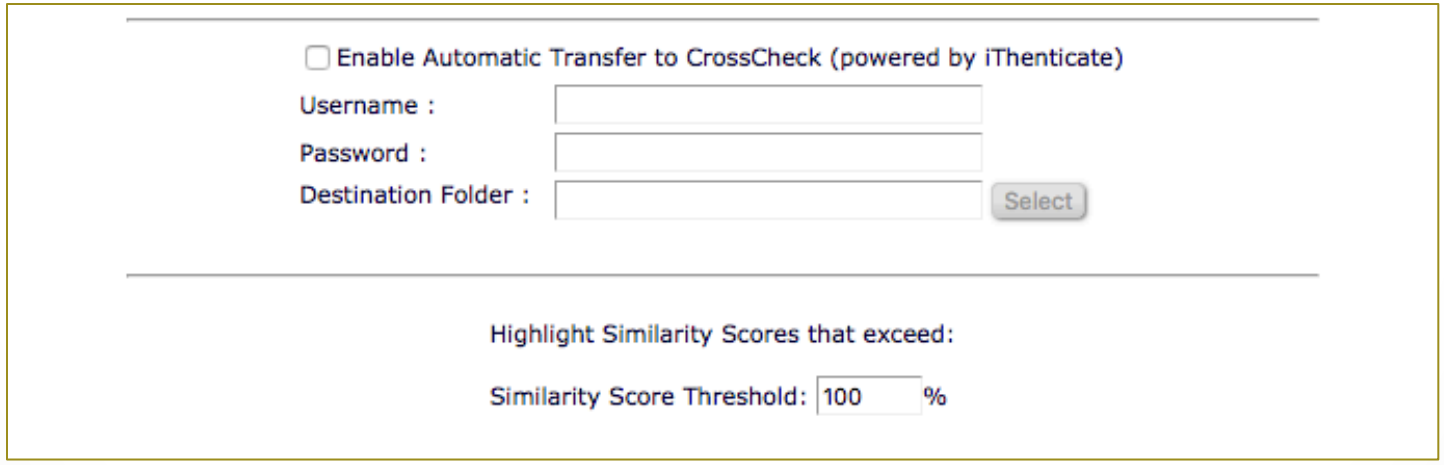
- The CrossCheck system allows publications to upload a copy of a submission to the iThenticate checking system where the submission is compared to a database of published papers submitted to CrossCheck by participating publishers (and to other sources, such as web sites).
- A report is generated detailing similarities between the uploaded submission and the published literature.

- EM can be configured to transfer files directly to CrossCheck.
- You must already have a CrossCheck/iThenticate account, set up in advance to receive files.
- Selected files can be sent to CrossCheck from EM on an ad hoc basis.

- Enabled by your AC.

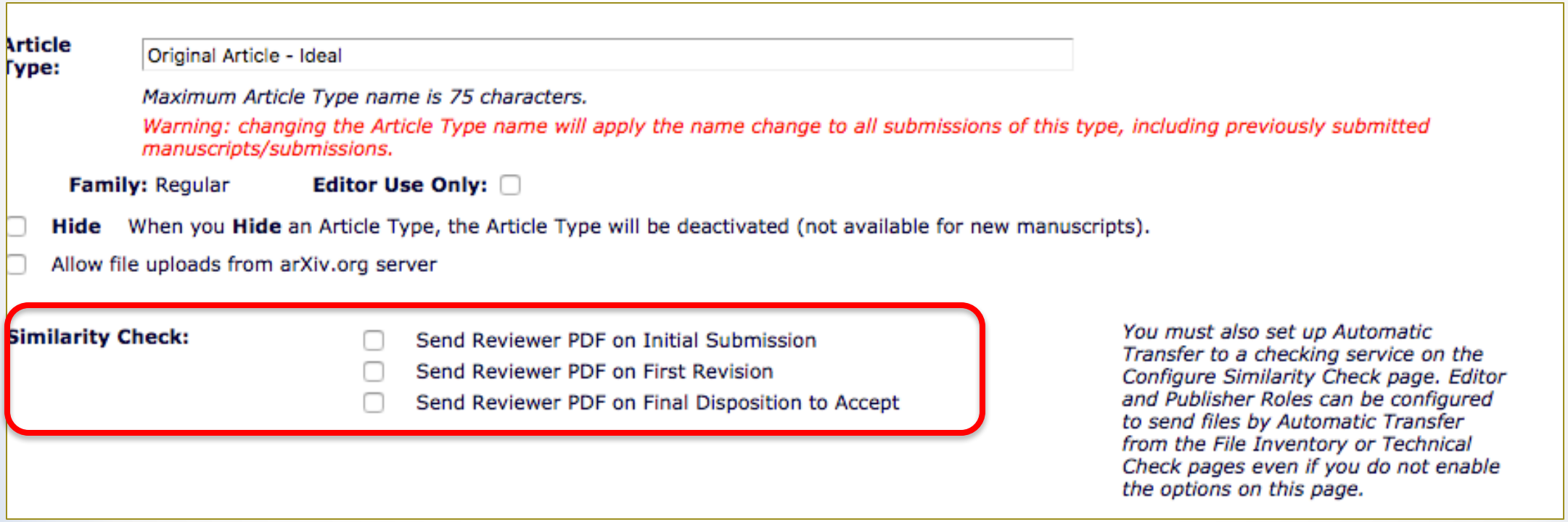
Configuring: CrossCheck

Editor Main Menu> System Administration> Policy Manager > Submission Policies > Configure Similarity Check



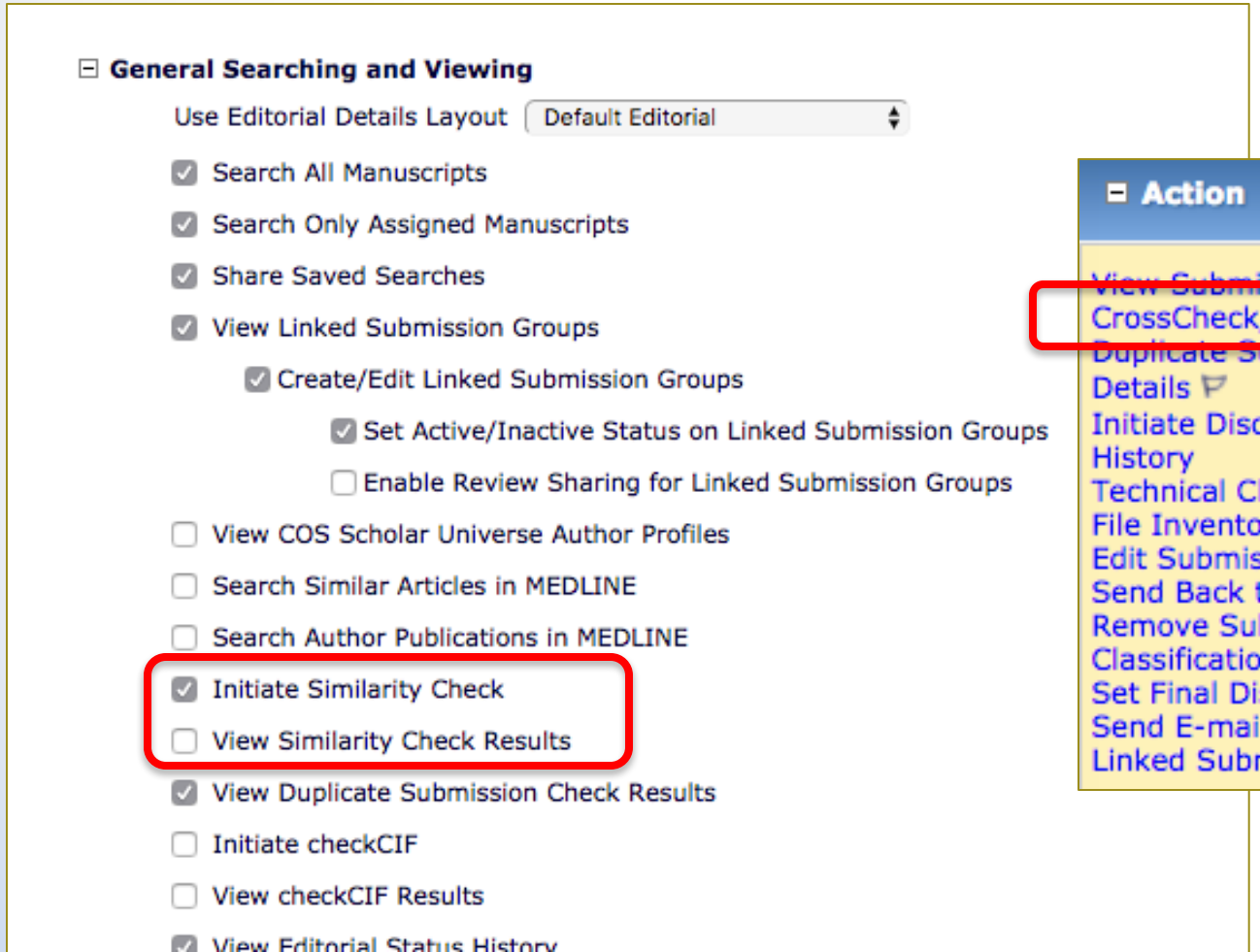
Configuring: CrossCheck

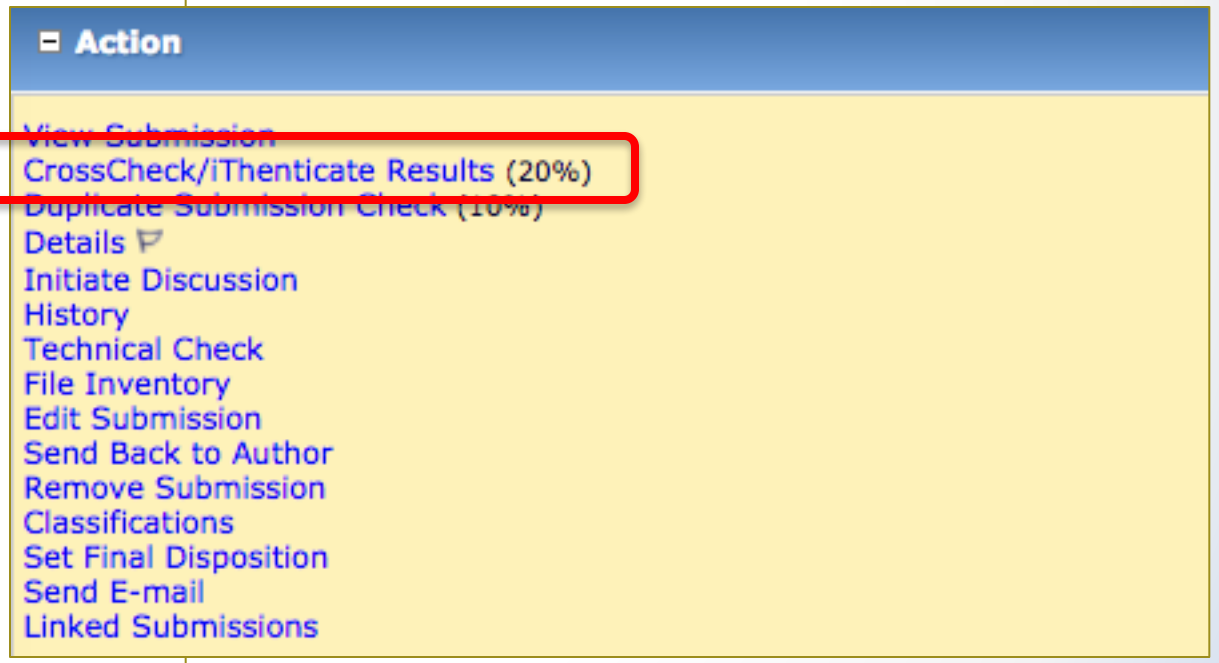
Editor Main Menu> System Administration> Policy Manager > Submission Policies > Edit Article Types > Edit (next to article type for checking)



CrossCheck: Assigning Roles

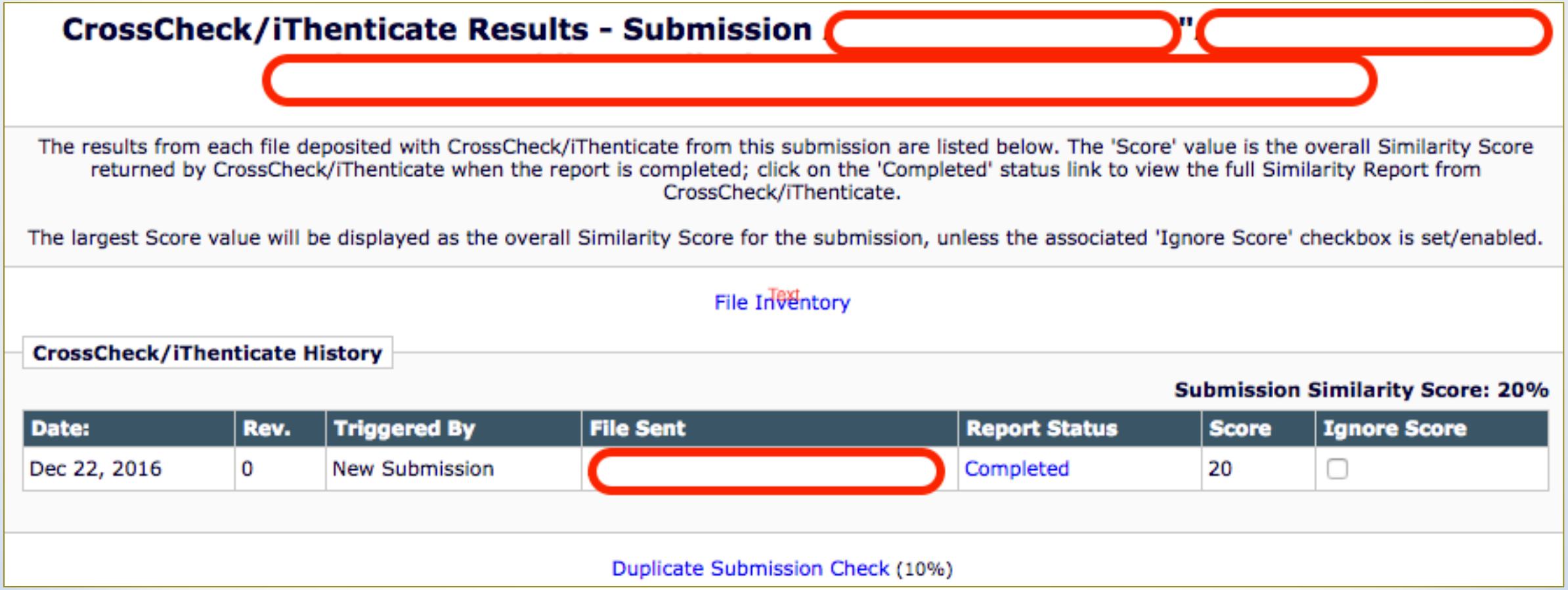
Editor Main Menu> System Administration> Role Manager > Edit Role Type > Edit Role





CrossCheck

Editor Main Menu> Manuscript > Action List> CrossCheck/iThenticate (00%)



CrossCheck/iThenticate Results - Submission "[redacted]"

The results from each file deposited with CrossCheck/iThenticate from this submission are listed below. The 'Score' value is the overall Similarity Score returned by CrossCheck/iThenticate when the report is completed; click on the 'Completed' status link to view the full Similarity Report from CrossCheck/iThenticate.

The largest Score value will be displayed as the overall Similarity Score for the submission, unless the associated 'Ignore Score' checkbox is set/enabled.

File Inventory

CrossCheck/iThenticate History

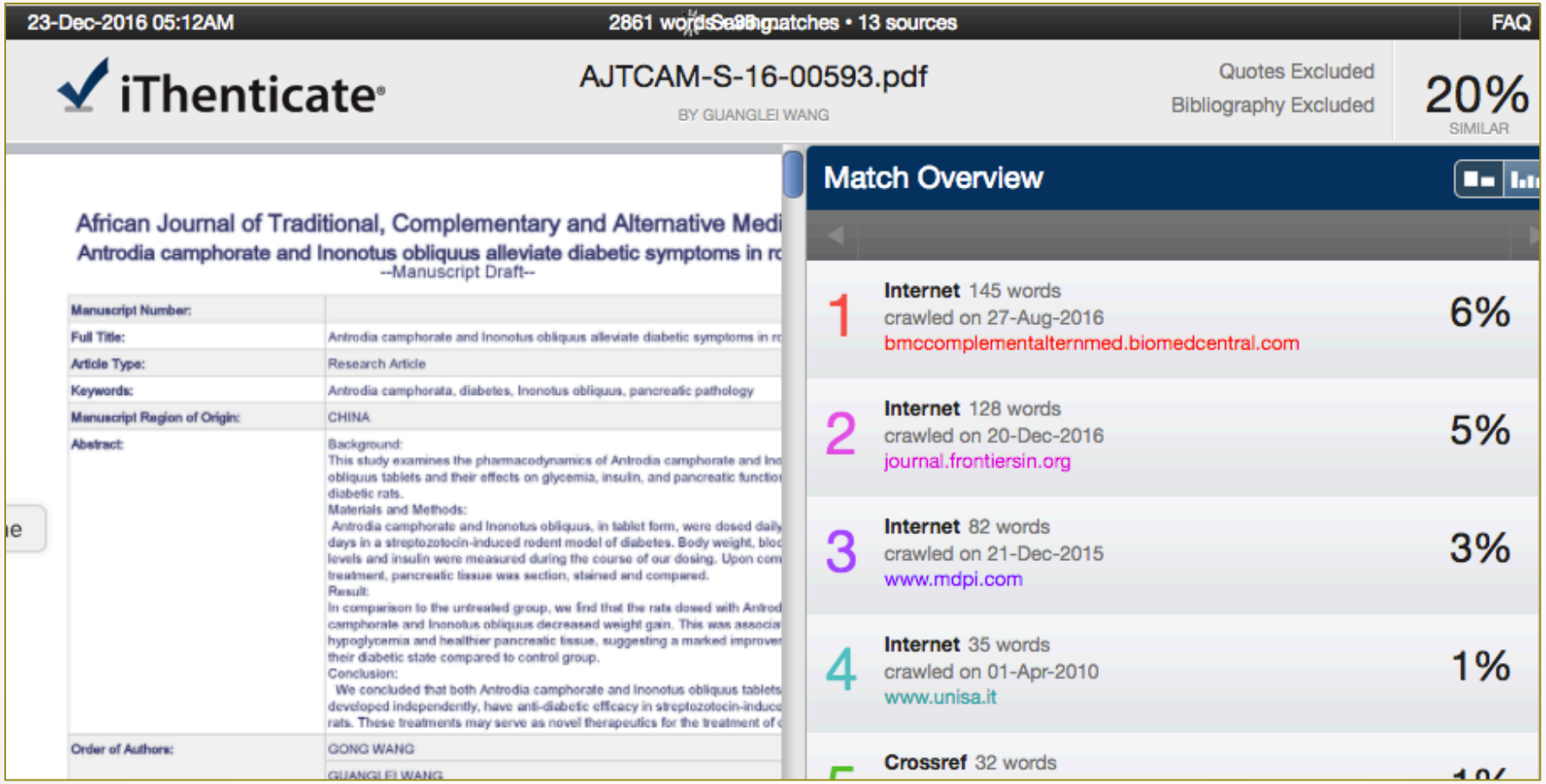
Submission Similarity Score: 20%

Date:	Rev.	Triggered By	File Sent	Report Status	Score	Ignore Score
Dec 22, 2016	0	New Submission	[redacted]	Completed	20	☐

Duplicate Submission Check (10%)

CrossCheck

Editor Main Menu> Manuscript > Action List> CrossCheck/iThenticate (00%)> Complete



Attachments

Submission Item Settings

Attachments

- Email Attachments
- Attachment Security
- Automatic Attachments (decision letters)
- Attachment Availability (who can access them)
- Attachment Sanitization

Attaching Files to Emails:

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

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)

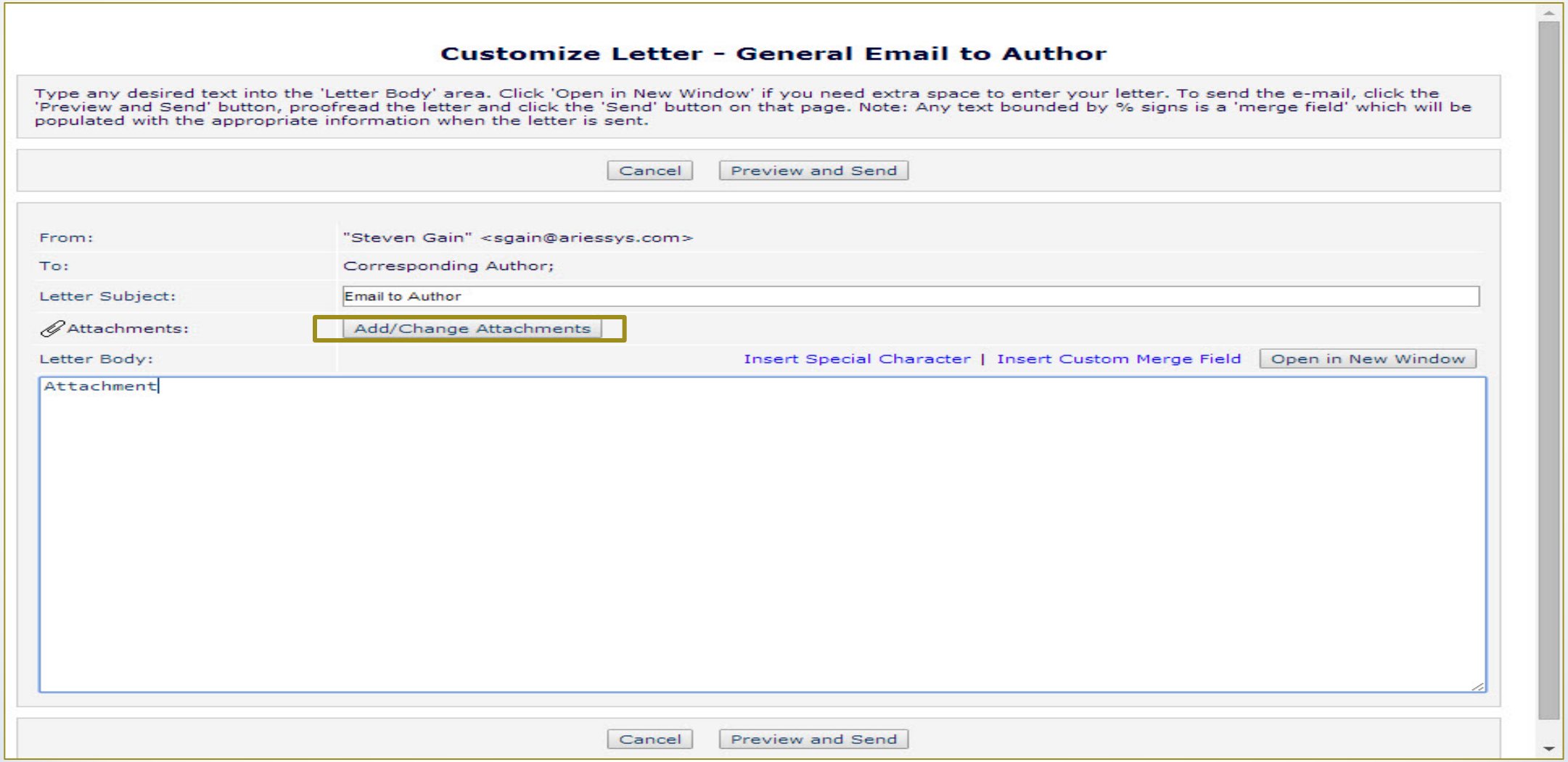
☐ Allow attachments

☐ 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.

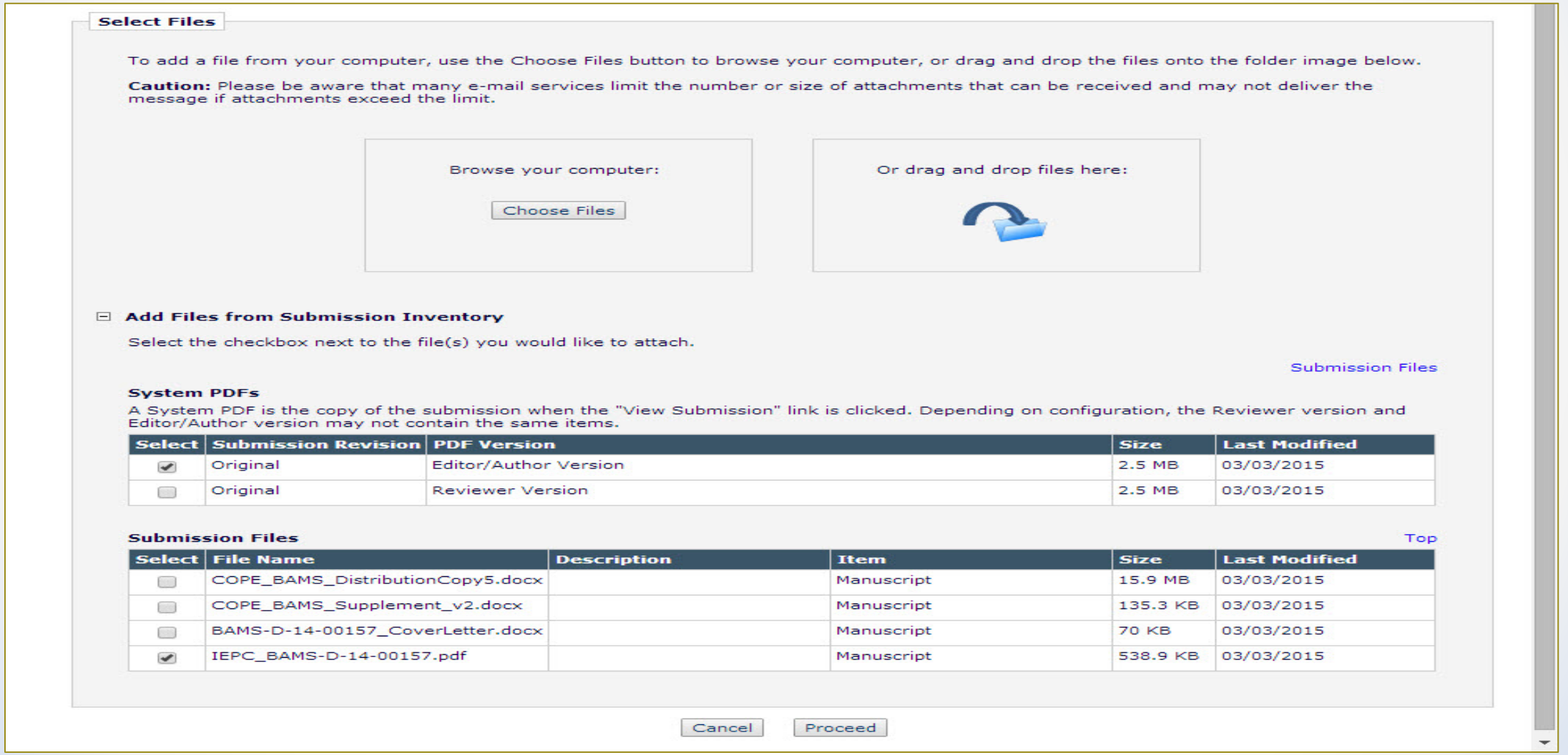
Attaching Files to Emails

Customise Letter



Attaching Files

Customise Letter > Add/ Change Attachments



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:

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
☑	Original	Editor/Author Version	2.5 MB	03/03/2015
☐	Original	Reviewer Version	2.5 MB	03/03/2015

Submission Files Top

Select	File Name	Description	Item	Size	Last Modified
☐	COPE_BAMS_DistributionCopy5.docx		Manuscript	15.9 MB	03/03/2015
☐	COPE_BAMS_Supplement_v2.docx		Manuscript	135.3 KB	03/03/2015
☐	BAMS-D-14-00157_CoverLetter.docx		Manuscript	70 KB	03/03/2015
☑	IEPC_BAMS-D-14-00157.pdf		Manuscript	538.9 KB	03/03/2015

Cancel Proceed

Attaching Files

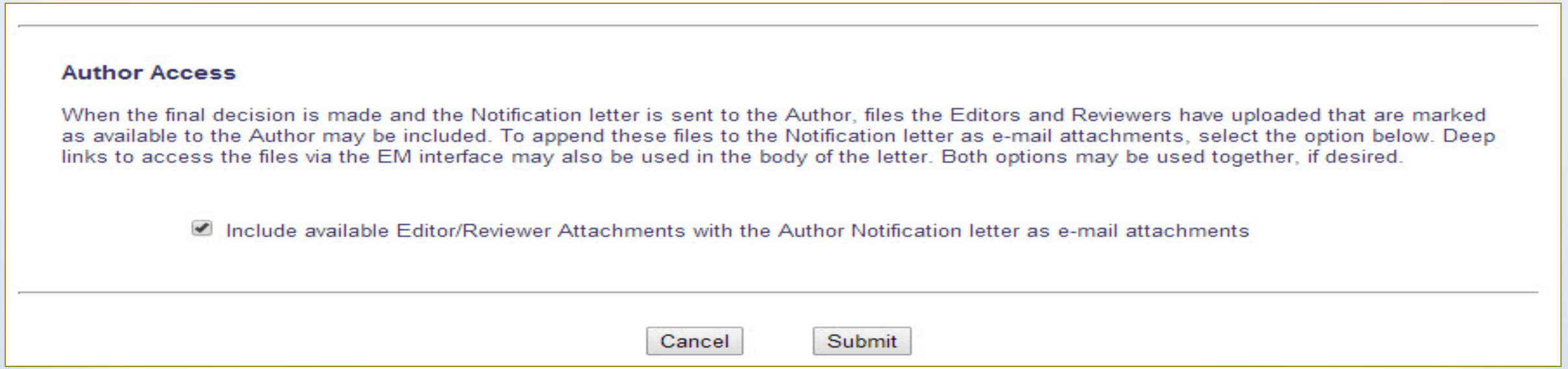
Customise Letter > Add/ Change Attachments

Decision letters: Automatic Attachments

System Admin> Policy Manager> ProducXion Manager > Configure Attachment Security

Decision letters: Automatic Attachments

System Admin> Policy Manager> ProducXion Manager > Configure Attachment Security



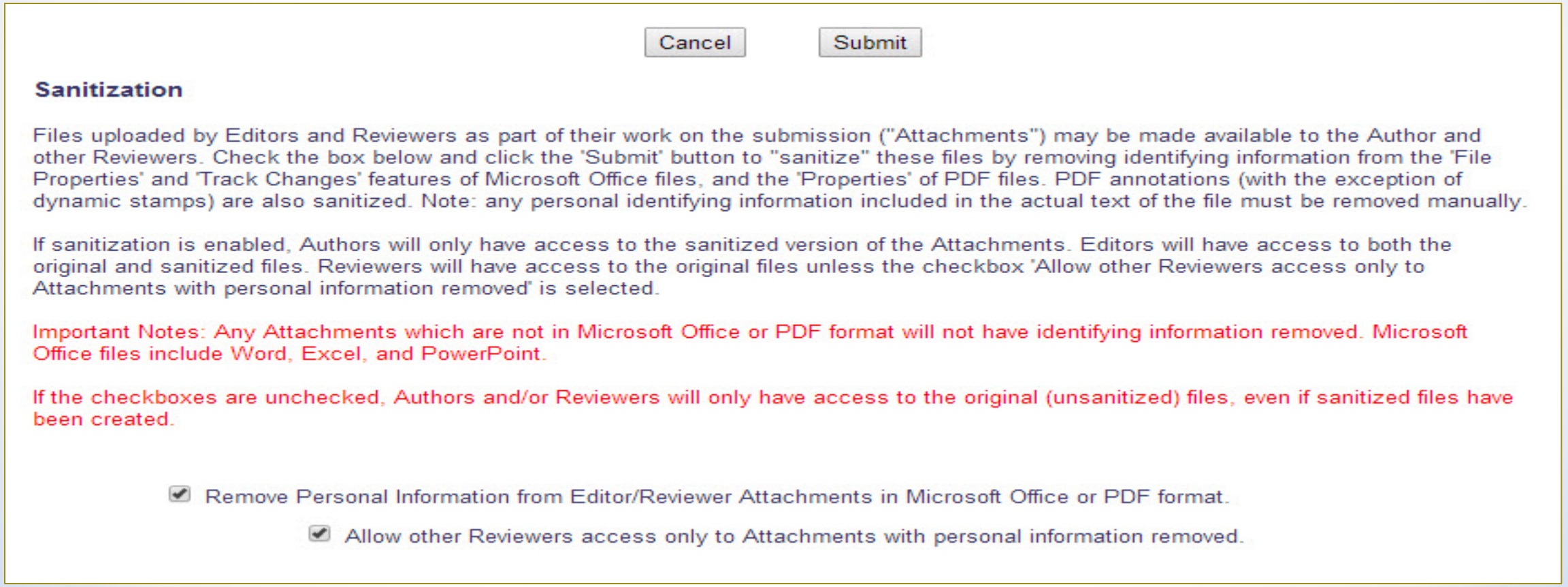
Attachment Availability

System Admin> Policy Manager> ProducXion Manager

> Configure Attachment Security

Attachment Sanitization

System Admin> Policy Manager> ProduXion Manager > Configure Attachment Security



Any Questions?

Helpful Links:

- File Upload Options
- Video: Limiting file types
- Defining Companion Files
- Customised PDF Watermarks
- Video: Automated Crystallography Check
- Reference Checking
- Crosscheck integration
- Attachments