

Welcome to EEMUG 2017

13th Annual **em** European
Editorial Manager[®]
User Group Meeting



Underused Features

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13/01/2017

13th Annual **em** European
Editorial Manager[®]
User Group Meeting



Underused Features

- Customize Author Main Menu
- Set File Size maximum
- Submission Item Metadata
- PowerGrid Options
- Saved Searches
- Reviewer search preferences
- Email ingest service
- Reviewer PDF & PDF download security
- Editor Discussion Forum
- Automatic DOI Assignment

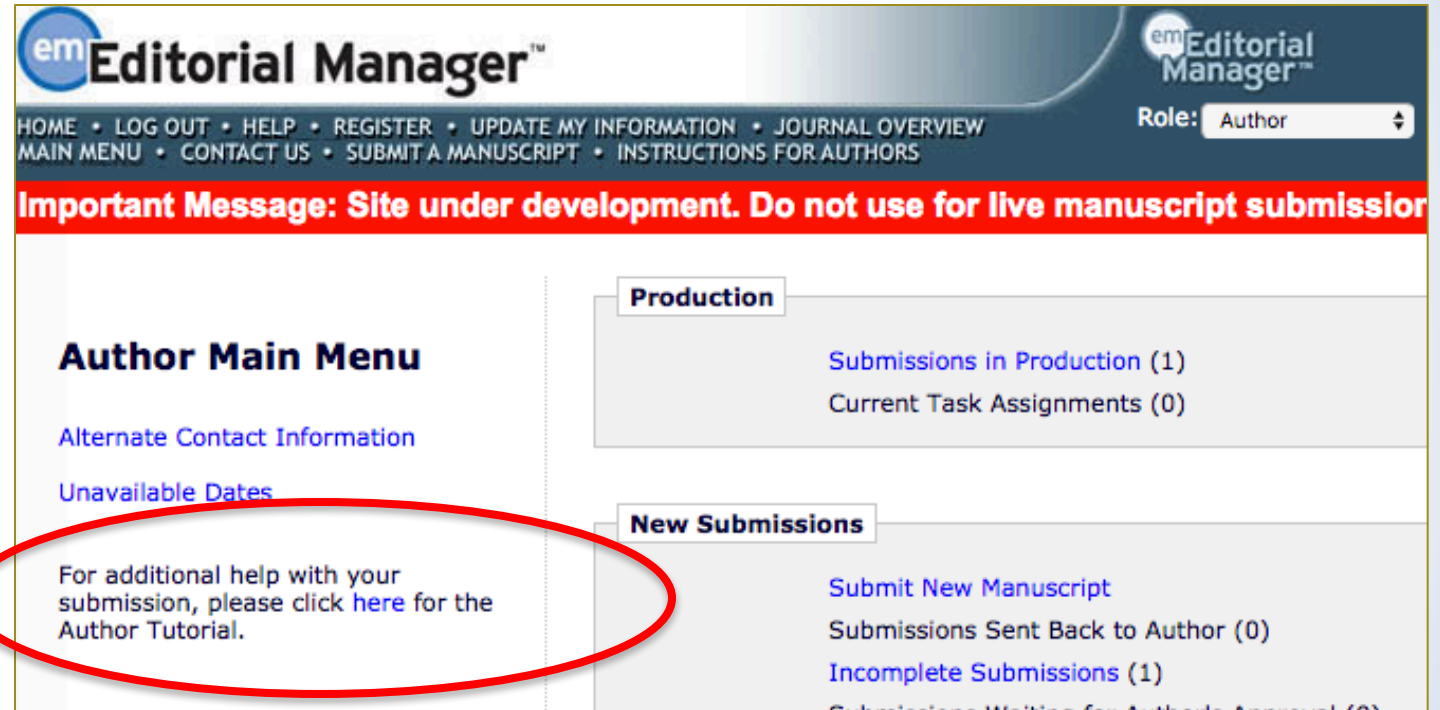
Customize Author Main Menu



Customize Author Main Menu Instructions

Customized Author Main Menu

- Publications may choose to provide instructions to their Authors directly on the Author Main Menu.
- This allows publications to provide information to Authors, such as guidance on addressing invitations to submit, reminders about submitting revisions from the original submission and not as a new submission, etc.



The screenshot shows the Editorial Manager interface for an Author. At the top, there is a navigation bar with the 'em Editorial Manager' logo and a role dropdown menu set to 'Author'. Below the navigation bar is a red banner with the text: 'Important Message: Site under development. Do not use for live manuscript submission'. The main content area is divided into two columns. The left column is titled 'Author Main Menu' and contains links for 'Alternate Contact Information' and 'Unavailable Dates'. A red oval highlights a paragraph of text: 'For additional help with your submission, please click here for the Author Tutorial.' The right column is divided into two sections: 'Production' and 'New Submissions'. The 'Production' section shows 'Submissions in Production (1)' and 'Current Task Assignments (0)'. The 'New Submissions' section shows 'Submit New Manuscript', 'Submissions Sent Back to Author (0)', 'Incomplete Submissions (1)', and 'Submissions Waiting for Author's Approval (0)'.

Customize Author Main Menu

System Administration > Policy Manager > General Policies
> Customize Author Main Menu Instructions

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>Insert Special Character</p> <p>For additional help with your submission, please click <code>here</code> for the Author Tutorial.</p>

Cancel Submit

- HTML can be used to add colour and links.
- Useful guidance and potential HTML available in [HELP](#)
- Perhaps provide a link back to your copyright forms or author instructions

Set File Size Maximum

...

Set File Size Maximum

- To prevent the upload of a file larger than the configured size limit.
- This limit applies to all files uploaded, whether or not they are built into the PDF, or accessed via a link in the PDF.
- You'll need to decide on a whole number (integer) of megabytes for this setting. For example: for a 30 MB limit, enter the number 30. If no limit is desired, leave the textbox blank.
- The publication can run a report to that will display file upload and download statistics. This report is found in AdminManager. It is called 'View File Upload/Download Statistics'. This report will show the number and total size for all uploaded files and all downloaded files over a specified time period.
- Applies to all users (Authors and Editors).

Set File Size Maximum

System Administration > Policy Manager > Submission Policies > Set Maximum Size of Uploaded File

Set Maximum Size of Uploaded File

You may place a limit on the size of Submission Item files. Files larger than this limit will not be attached to the submission, and the Author will receive an error message.

Please enter a whole number (integer) of megabytes in the text box below. If no limit is desired, leave the text box blank. Example: for a 30 MB limit, enter the number 30.

Maximum File Size: MB

Cancel

Submit

Set File Size Maximum

Author Main Menu > During submission > Attach files page

Warning: 1 or more items may require attention							Dismiss All	Check All	Clear All
Order	Item	Description	File Name	Size	Last Modified	Actions	Select		
<input type="checkbox"/>	File not uploaded: exceeds maximum file size of 1 MB		UnderusedFeatures_MB.pptx	7.5 MB		Dismiss	<input type="checkbox"/>		
<input type="button" value="Update File Order"/>							<input type="button" value="Remove"/>		
Warning: 1 or more items may require attention							Dismiss All	Check All	Clear All

- A per file limit.
- Helps you to manage your data transfer and storage costs.
- Applies to all submission items at once.
- Applies to files whether or not they are built into the PDF, or accessed via a link in the PDF.
- Neither Authors nor Editors will be able to upload a file larger than the configured size limit.

Submission Item Metadata

...

Submission Item Metadata

- The publication can create metadata fields to be associated with a specific Submission Item Family (e.g. the 'Figure Number' field can be created and be associated with the 'Figure' Submission Item Family).
- The submission item metadata fields can be ordered.
- These metadata fields can be configured to be completed by the Author during submission.
- An 'Edit' link next to a previously attached Submission Item allows entry of metadata for Submission Items that have already been attached to the submission.
- Data can be entered on the Transmittal Form for these fields.

Submission Item Metadata

PolicyManager> Submission Policies> Edit Article Types> Submission Item Parameters

EDIT DATA

The data associated with your submission item is shown to the right. Required data is marked with a *. Please update any needed data.

To save any changes, you must click the "Save Changes" button before you leave this window.

Item	Manuscript
Description	<input type="text" value="Manuscript"/>
File Name	I am a wonderful companion File9.docx
Manuscript Word Count	

Cancel Save Changes

Cancel Save Changes

Submission Item Metadata

PolicyManager > Transmittal Policies > Add/Edit Submission Item Metadata

Submission Item Metadata Fields

These fields provide a master list of Submission Item metadata which can be mapped to a specific Item Type Family from [Edit Submission Item Family Metadata](#) in PolicyManager. Any Submission Item information required for production should be set up here (e.g. figure specific information).

To Add a new field, enter the description and click the Add button. A field may be removed unless it has been attached to a submission.

Order	Description	Hidden on Edit Article Type	Hidden on Transmittal Form	Actions
<input type="text" value="1"/>	Figure Number	<input type="checkbox"/>	<input type="checkbox"/>	Remove Edit
<input type="text" value="2"/>	Table Number	<input type="checkbox"/>	<input type="checkbox"/>	Remove Edit
<input type="text" value="3"/>	Manuscript Word Count	<input type="checkbox"/>	<input type="checkbox"/>	Remove Edit
<input type="text" value="4"/>	Supplemental Data Information	<input type="checkbox"/>	<input type="checkbox"/>	Remove Edit

Add a new field, or edit an existing field.

Submission Item Metadata

PolicyManager> Transmittal Policies> Add/Edit Submission Item Metadata>
Add

Add Submission Item Metadata Field

Field Description: [Insert Special](#)

Test Submission Item Meta Data
Maximum 256 characters

Field Type:

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

Default Value for Field: [Insert Special Character](#)

Options

Select the 'Hide' checkbox to suppress the field on a particular page. If a field is Editable on the page indicated, 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 up a pop-up containing the Help Text.

Page	Hide	Editable	Required	Help Text
Edit Article Type	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

At the bottom of the page is an 'Options' grid. Uncheck/deselect the 'Hide' box next to 'Edit Article Type'.

Submission Item Metadata

PolicyManager> Transmittal Policies> Edit Submission Item Family Metadata

Edit Submission Item Family Metadata

Listed below are the Submission Item Families. Click Edit Metadata Field Selections to select the metadata items that relate to that Family. The "Default" family has no user-defined metadata.

Item Family	Action
Default	
Figure	Edit Metadata Field Selections
Document	Edit Metadata Field Selections
Supplemental	Edit Metadata Field Selections
Table	Edit Metadata Field Selections

[Back to PolicyManager](#)

Submission Item Metadata

PolicyManager> Transmittal Policies> Edit Submission Item Family Metadata

Edit Individual Submission Item Family Metadata

Submission Item Family Name: Document

Check the fields that are associated with this Item Family. An asterisk indicates the field is required if selected.

Select

Field	Field Name
<input type="checkbox"/>	Figure Number
<input type="checkbox"/>	Table Number
<input checked="" type="checkbox"/>	Manuscript Word Count
<input type="checkbox"/>	Supplemental Data Information
<input type="checkbox"/>	Test Submission Item Meta Data

Submission Item Metadata

PolicyManager > Submission Policies > Edit Article Types > Submission Item Parameters

Manuscript	New Submission	Revised Submission
Required for Submission:	Optional ▾	Required ▾
Allow Offline Submission:	Optional Required ✓ Hidden	Optional ▾
Item Metadata: Manuscript Word Count		Hidden ▾
<input type="checkbox"/> Exclude from Reviewer PDF (for New and revised Submissions)		
<input checked="" type="checkbox"/> Publisher gets file: (for New and revised Submissions)		

Submission Item Metadata

PolicyManager> Submission Policies> Edit Article Types> Submission Item Parameters

Source Files							
Item Type	Item Description	File Name	Last Modified	Actions	Original Item Artwork Quality/Reference Check Results	Include Item in Publisher Zip File	Substitute Item Artwork Quality Results
PDF	PDF			View	N/A View Reference Checking Results	✓	N/A
Manuscript	Manuscript	I am a wonderful companion File9.docx	16 Aug 2016	Download Original Item Item Metadata	Untested	✓	N/A

Data can be entered on the Transmittal Form for these fields.

Interactive “PowerGrid”



New since 12.0: The interactive, “PowerGrid” offers a configurable grid interface. Editors may resize, drag & drop, freeze, or hide irrelevant columns.

Interactive “PowerGrid” Options

New Submissions folder...

Contents: These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort order.

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

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Details Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Send E-mail Linked Submissions	ABBEY164	Testing Article Type		tst	Wolfgang Writer	23 Dec 2016	23 Dec 2016	Manuscript Submitted

- Toggle to return to the traditional grid
- Quick link to video demonstrating the power grid
- Drag margin to resize the columns
- Click arrows to reorder the manuscripts.
- Click on the Gear for more options...

Interactive “PowerGrid” Options

Column Header	Fixed	Show
Manuscript Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Article Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Current Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Author Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Status Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reviewers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Handling Editor	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Assigned Editors	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Short Title	<input type="checkbox"/>	<input type="checkbox"/>
Keywords	<input type="checkbox"/>	<input type="checkbox"/>
Classifications	<input type="checkbox"/>	<input type="checkbox"/>
Initial Date Submitted	<input type="checkbox"/>	<input type="checkbox"/>
Review Status	<input type="checkbox"/>	<input type="checkbox"/>
Section/ Category	<input type="checkbox"/>	<input type="checkbox"/>

- Lists everything that’s available to be included.
- Select the ones you would like to see by marking the "Show" checkbox.
- You may also lock columns in place by selecting the “Fixed” checkbox.
 - So the information stays in place as you scroll across
- These columns appear together on the left side.



Interactive “PowerGrid” Options

Go to: Search Submissions / Search Submissions (production) / Search Proposals

Manuscript Number is containing ''

Page: 1 of 4 (36 total submissions) 1 2 3 4 10 results per page.

Manuscript Number	Action	Article Type	Current Status	Author Name	Article Title	S D
ABBEY154	View Submission Details Initiate Discussion	Case Report	With Editor	Agnetta AuthorDrei	KNoock on Wood	25 J

- Save this search*
- Download your search results
- Search Again.
- Column headers are fixed during scrolling
- Quick link to video demonstrating the power grid.
- Search Criteria across the top of the page
- You can deselect the power grid on the Search Criteria page

Interactive “PowerGrid” Options

The screenshot shows a web interface for 'Search Submissions - Search Results'. The search criteria is 'Manuscript Number is containing '''. The page shows 'Page: 1 of 4 (36 total submissions)'. A table of results is displayed with columns: Manuscript Number, Action, Article Type, Author Name, Current Status, Article Title, and S. A red box highlights a 'Quicklinks' button at the top left. A red arrow points from this button to a dropdown menu that lists: Quicklinks, Editorial Menu, Production Tasks Menu, Production Status Grid, and Switch to Production View. Another red box highlights the '10 results per page.' dropdown menu, which is currently open, showing options: 10 (checked), 25, 50, 100, 250, and 500. A third red box highlights the 'Article Title' column header, which is yellowed, and a red arrow points to the 'With Editor' status in the first row.

Manuscript Number	Action	Article Type	Author Name	Current Status	Article Title	S
ABBEY154		Case Report	Agnetta AuthorDrei	With Editor		25 Ji

- Quick links to other menus are at the top
- Ability to increase or decrease the number of results on each page
- Ability to reorder the columns by dragging and dropping them into the desired spot
- These changes are saved for the next time **you** access this grid.

Saved Searches



Save your search criteria and re-run the same query whenever you need to. Choose to save a 'Quick Link' to the search on a role main menu

Saved Searches

Go to: Search Submissions / Search Submissions (Production)/ Search Proposals
or Editor Main Menu > Search > Search Submissions

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](#)

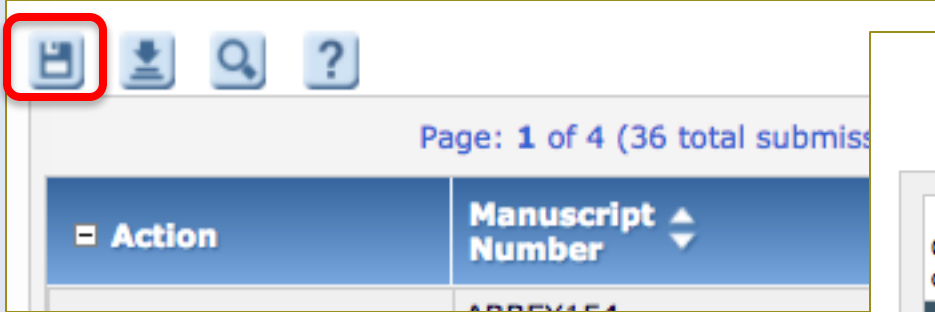
Search Definition: Choose Saved Search ▾

[Help with Searching](#) [Insert Special Character](#) [Value Options](#) [Advanced Criteria](#)

(Criterion	Is/Is not	Selector	Value)
▾	Manuscript Number	is ▾	Contains ▾	1	▾
					<input type="button" value="Add"/>

Saved Searches

Go to: Search Submissions / Search Submissions (Production)/ Search Proposals
> [Enter Criteria] > Search
or Editor Main Menu> Search > Search Submissions >[Enter Criteria]> Search



- Search Criteria is displayed
- Name your search
- Decide whether it should show on the Editor Main menu

Save Search Criteria

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

Criteria	Search Criteria Name
Manuscript Number is containing '1' or Manuscript Number is containing '2' or Manuscript Number is containing '3'	<input type="text" value="Ms. Nos. 1 -3"/>
	<input checked="" type="checkbox"/> Show this Search in Main Menu

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

Saved Searches

Go to: Search Submissions / Search Submissions (Production)/ Search Proposals
or Editor Main Menu > Search > Search Submissions

Managing Editor Main Menu

Quick Searches:

[MS Cont. Abbey](#)

[Ms. Nos. 1 -3](#)

[New Search](#)

[Saved Search 2](#)

[test](#)

Existing Search definition to Run, Edit, or Remove. You may refine your c

Search Definition: Choose Saved Search

- [MS Cont. Abbey](#)
- [Ms. Nos. 1 -3](#)
- [New Search](#)
- [Saved Search 2](#)
- [test](#)

it Selected Search Definition definition Run S

Insert Special Character value Options

	Is/Is not	Selector	Value
	is	Contains	1

Saved Searches

Go to: Search Submissions / Search Submissions (Production)/ Search Proposals
or Editor Main Menu > Search > Search Submissions

Search Definition: Choose Saved Search

Search Definition: ✓ Choose Saved Search
MS Cont. Abbey
Saved Search 2
test

Search Definition: MS Cont. Abbey

Remove Search Definition Edit Selected Search Definition Share Selected Search Definition Run Selected Search Definition

- Select a saved search from the Search menu
- You can Remove, Edit or Run the selected Search
- You can also chose to Share the search...

Saved Searches

Go to: Search Submissions / Search Submissions (Production)/ Search Proposals or Editor Main Menu > Search > Search Submissions > Share selected definition

Search Definition: Ms. Nos. 1 -3

Selected Search Definition Share Selected Search Definition Run Selected S

If you'd like to share a search with a specific role

- Select the search you'd like to share
- Click Share selected Search Definition
- Select who to include by role
- Click Proceed.

Save Search Criteria

Select the Roles that will be able to use this Search Definition. Users with access to 'Search Submissions' or 'Search Proposals' links will be able to select the definitions there; users without access to these links can only use searches that are configured with the 'Show this Search in Main Menus' option set.

Cancel Proceed

Include	Role:
<input type="checkbox"/>	Managing Editor
<input type="checkbox"/>	Editor
<input type="checkbox"/>	Editorial Assistant

And it will again as shown before – show on the Main Menu for Editors with that role.

Reviewer Search Preferences



Search Entire Database, My Suggest Reviewer Preferences and My Reviewer Display Preferences

Search Entire Database...

Editor Main Menu > Invite Reviewers > Reviewer Selection Summary > Search my Publication – from Entire database:

Reviewer Selection Summary - Submission ABBEY1519

Andrew AuthorZwei

Duis pharetra, arcu rhoncus consequat interdum, ex justo mattis sem, vel venenatis urna eros id nunc.

Reviewer Search

Search My Publication

Search for Reviewers

from

- ✓ All Reviewers
- Reviewer
- Entire Database

Go

Inv.	Asn.	Alt.	Prop.	Fake Account			Avg F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No	

This publication:

(This person does not have a Reviewer Role in this publication)

My Suggest Reviewer Preferences

- EM will suggest “qualified” Reviewers based on a predetermined set of criteria defined in the ‘My Suggest Reviewer Preferences’.
- Settings accessible from the Reviewer Selection Summary Page and Suggest reviewer Results page.
- Each Editor has their own set of preferences.
- There are two parts to configuring the ‘My Suggest Reviewer Preferences’ page:-
 - Identifying what kind of people should be excluded from the list of possible Reviewers,
 - identifying how the people in the list of possible Reviewers are sorted and displayed by ordering the Sort options from 1-7.

My Suggest Reviewer Preferences

[Return to Submissions with Required Reviews Complete](#)

[Return to Main Menu](#)

View Submission Information

[Manuscript Details](#)  

[Classifications](#)

[View Submission](#)

Quick Action Links

[Submit Editor's Decision and Comments](#)

[Send E-mail](#)

[Register and Select New Reviewer](#)

Set Preferences

[My Suggest Reviewer Preferences](#)

[My Reviewer Display Preferences](#)

My Suggest Reviewer Preferences

Exclude the following from the list:

People from the same institution

People from the same city

People with unavailable dates within the next days

People with more than pending reviews

People with fewer than matches to manuscript classifications

Sort the Candidate Reviewer list in order of importance by:

Board membership

Number of matches to manuscript classifications

Number of pending reviews

Average number of days reviews are outstanding

Date last review completed

Average Review Rating (Highest Ratings listed first)

Total Number of Completed Reviews (Highest number displayed first)

My Suggest Reviewer Preferences

My Suggest Reviewer Preferences

Exclude the following from the list:

- People from the same institution
- People from the same city

People with unavailable dates within the next days

People with more than pending reviews

People with fewer than matches to manuscript classifications

My Suggest Reviewer Preferences

Sort the Candidate Reviewer list in order of importance by:

- Board membership
- Number of matches to manuscript classifications
- Number of pending reviews
- Average number of days reviews are outstanding
- Date last review completed
- Average Review Rating (Highest Ratings listed first)
- Total Number of Completed Reviews (Highest number displayed first)

Update Order

My Reviewer Display Preferences

- Editors configure how Reviewers' Classification data should be displayed when viewing a list of potential Reviewers on the 'Select Reviewer' page.
- Editors also configure sort preferences by ordering the Sort Preference options from 1-5.
- Settings accessible from the Reviewer Selection Summary Page and Suggest reviewer Results page.
- Editors can choose a default sort order for all of the Reviewer Selection pages (except for Suggest Reviewer, which has its own set of sort criteria) on the 'My Reviewer Display Preferences' page.
- Each Editor has their own set of preferences

My Reviewer Display Preferences

[Return to Submissions with Required Reviews Complete](#)

[Return to Main Menu](#)

View Submission Information

[Manuscript Details](#) 

[Classifications](#)

[View Submission](#)

Quick Action Links

[Submit Editor's Decision and Comments](#)

[Send E-mail](#)

[Register and Select New Reviewer](#)

Set Preferences

[My Suggest Reviewer Preferences](#)

[My Reviewer Display Preferences](#)

My Reviewer Display Preferences

Classifications

Please choose how you would like Classifications to be displayed on the Reviewer Selection results pages. This setting applies to all Reviewer search modes, except for Search by Personal Classifications.

- Show only Classification matches with manuscript
- Suppress Classifications
- Show all Personal Classifications for the Reviewer candidate

Sort the Candidate Reviewer list in order of importance by:

You may also choose how the Candidate Reviewer lists are sorted. This sort preference applies to all Reviewer search modes, except for Suggest Reviewers, which has its own separate set of preferences.

Ascending Reviewer Name

My Reviewer Display Preferences

My Reviewer Display Preferences

Classifications

Please choose how you would like Classifications to be displayed on the Reviewer Selection results pages. This setting applies to all Reviewer search modes, except for Search by Personal Classifications.

- Show only Classification matches with manuscript
- Suppress Classifications
- Show all Personal Classifications for the Reviewer candidate

My Reviewer Display Preferences

Sort the Candidate Reviewer list in order of importance by:

You may also choose how the Candidate Reviewer lists are sorted. This sort preference applies to all Reviewer search modes, except for Suggest Reviewers, which has its own separate set of preferences.

- 1 Ascending Reviewer Name
- 2 Number of Matches to Manuscript Classifications (Most matches displayed first)
- 3 Board Membership (Board Members listed first)
- 4 Average Review Rating (Highest Ratings listed first)
- 5 Total Number of Completed Reviews (Highest number displayed first)

Email Ingest Service



Configure Email Import

Configure Email Import

- Users will sometimes provide information to the publication outside of Editorial Manager.
- Email import is a way to automate adding this external correspondence to the correct manuscript.
- Emails to be imported are forwarded to a unique drop box e-mail address created by Editorial Manager.
- Emails are matched to the correct submission using a unique identifier (EMID) that is inserted into to subject line of outgoing emails.
- EMID: A unique code appended to the subject line of an email:
 - Example:
[EMID:ed06f6b074241c34].
 - Used to link external email to EM submission.
 - Must have an EMID in subject line to be properly ingested.

Configure Email Import

PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

- Registration and Login Policies**
- Status Policies**
- Submission Policies**
- Questionnaire Policies**
- Additional Data Policies**
- Editor Assignment Policies**
- Reviewer and Editor Form Policies**
- E-mail and Letter Policies**
 - Edit Letters
 - Define Custom Merge Fields
 - Set "Email From" Address
 - Set Non-Email "Preferred Method Of Contact" Correspondence Email Address
 - Set Notify Author Blinding Policy
 - Configure Email Import**
 - Set Notify Editor Preference

Configure Email Import

Configure Email Import

A user who receives replies, outside the system, to system-generated Emails may add them to the appropriate Correspondence History by forwarding them to the 'Drop-Box' address displayed below, once submitted.

If you generate and submit a new address, any previous address is made inactive and cannot be used again (this allows you to retire an address that has become a target for spam Emails). Clear the address and submit the page to turn off the ability to import mail into the publication.

You must submit this page for any changes to the Drop-Box Address to take effect. You should inform anyone who forwards mail in this way immediately of any changes to this address.

Set 'Drop-Box' Email Address:

em.demosgg120-1854397f2f8f8556@editorialmanager.com

Generate New Address

Clear Address

Once activated, the system will attempt to import Email sent to the 'Drop-Box' address. If this import fails, and the mail subject line contains a valid import identifier code created by EM, then the system can forward the failed Email to a contact address for notification. To enable failure notifications, type in the desired Email address below. Delete this address to disable this feature.

Set Email Address for Failure Notifications:

sgain@ariessys.com

Cancel

Submit

Editor Access for the Reviewer PDF & PDF download Security

...

Editor Access for the Reviewer PDF

- The Reviewer PDF can be configured in PolicyManager to exclude certain submission items to make sure only the relevant files are displayed to the Reviewer.
- This is helpful for publications that operate using blind peer review or require Corresponding Authors to attach confidential files to the submission.
- In v13.0 Permissions are added to Editor RoleManager to allow access to the Reviewer version of the PDF so Editors can make sure all intended items are displayed and the PDF is blinded appropriately.

Editor Access for the Reviewer PDF

System Administration > Role Manager > Editor Role > [Role] Edit
> General Searching and Viewing Section & Edit Submission

View Reviewer PDF

Edit Submission

Edit Submission Before Decision

View Reviewer PDF After Edit Submission

Require View of Reviewer PDF After Edit Submission

Editor Access for the Reviewer PDF

With the “View Reviewer PDF” Permission (Role Manager > Editor Role > Edit [Role]):
Editor main Menu > View Submission



Defining what goes in the Reviewer PDF

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

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

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

Reviewer PDF Handling

Author/Editor PDF Handling

Important Note: If 'Build Hyperlink to the Item into the PDF(Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

Defining what goes in the Reviewer PDF

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

Video File	Optional Required ✓ Hidden	Revised Submission
Required for Submission:		Hidden
Allow Offline Submission:	Optional	Optional
Item Metadata: Supplemental Data Information	Hidden	Hidden
<input type="checkbox"/> Exclude from Reviewer PDF (for New and revised Submissions)		
<input type="checkbox"/> Publisher gets file: (for New and revised Submissions)		

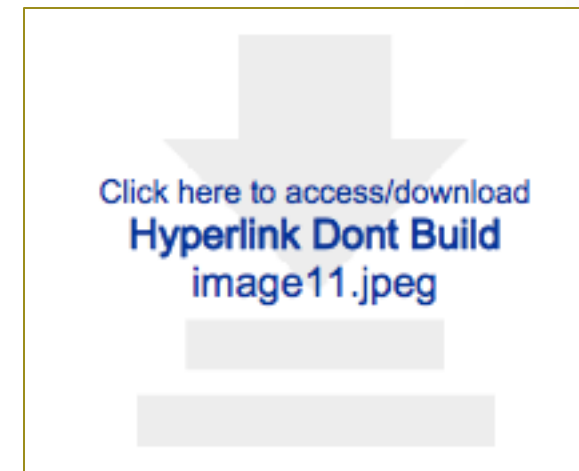
PDF security?: Login

- Enabled by your Aries Account Coordinator.
- To Require Login to Download source files from PDF Links.
- If a link to a source file in the system PDF is clicked, the user is delivered to the EM login page.
- After a successful login, the source file download will commence.
- If the user is already logged into an EM session, they do not need to re-enter their login credentials to download the file.

Build and hyperlink to the item into the PDF



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



Editor Discussion Forums



Editor Discussion Forums

- To facilitate Editorial committees, triage or simply to request the opinions or feedback from other Editors regarding a submission.
- Use this feature to invite other Editors to participate in an informal discussion regarding a particular submission.
- A discussion can be initiated at any point in the workflow.
- No delay to the editorial or production process is introduced by using the forum in any way.
- The workflow of Editor assignment, peer review, and Editor decision can happen as normal along side.
- Multiple discussion topics can be created for each submission if needed.

Editor Discussion Forums

System Administration > Role Manager > Editor Role > Edit

Discussion Forums

- View All Discussions
- Initiate and Manage Discussions
 - My Discussions Only
 - All Discussions

Action

- [View Submission](#)
- [Details](#)
- [Initiate Discussion](#)
- [History](#)
- [File Inventory](#)
- [Edit Submission](#)
- [Classifications](#)

Editor 'To-Do' List

My Pending Assignments (16)

[Editorial Submissions in Progress](#) (1)

[New Submissions](#) (2)

[Revised Submissions](#) (1)

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

[Revised Submissions Requiring Assignment](#) (0)

[Incomplete Submissions](#) (1)

[New Assignments](#) (0)

[Submissions with Required Reviews Complete](#) (2)

[Submissions Requiring Additional Reviewers](#) (3)

[Submissions with One or More Late Reviews](#) (1)

[Submissions with Active Discussions](#) (7)

[Reviews in Progress](#) (1)

[Reviewers Invited - No Response](#) (0)

[Submissions Under Review](#) (1)

Editor Discussion Forums

Editor Folder > Initiate Discussion

Initiate Discussion for Manuscript Number: **ABBEY1519**

Andrew AuthorZwei

"Duis pharetra, arcu rhoncus consequat interdum, ex justo mattis sem, vel venenatis urna eros id nunc."

Choose Topic Template*:

Editor Candidates

Select	Editor Role	Editor Name	Current Assignments	View Reviews and Comments	Download Files(source and companion)	View Draft Decision Letter	# Classification Matches	Classification Matches	Available during next 30 days
<input type="checkbox"/>	Editor	Eddie Editor	8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Editor	Ernest Editor	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Managing Editor	Princess Celestia	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Managing Editor	Monkey Man	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Managing Editor (This editor is already assigned to the current submission)	mary mary	7				0		Yes
<input type="checkbox"/>	Managing Editor	Flutter Shy	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes

Editor Discussion Forums

Editor Folder > Initiate Discussion

Initiate Discussion for Manuscript Number: ABBEY1519

Andrew AuthorZwei

"Duis pharetra, arcu rhoncus consequat interdum, ex justo mattis sem, vel venenatis urna eros id nunc."

Choose Topic Template:

Twiddley dee, Twiddley diddley dee
Twiddley dee, Twiddley diddley dee
[\(more...\)](#)

Topic	Robin Of Kewl
Initial Comments	Sing if you can...

Editor Discussion Forums

Editor Folder > Initiate Discussion

Editor Candidates

Page: 1 of 1 (6 total candidates)

Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	View Reviews and Comments	Download Files(source and companion)	View Draft Decision Letter	# Classification Matches	Classification Matches	Available during next 30 days
<input type="checkbox"/>	Editor	Eddie Editor	8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Editor	Ernest Editor	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Managing Editor	Princess Celestia	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0		Yes
<input type="checkbox"/>	Managing Editor	Monkey Man	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Managing Editor (This editor is already assigned to the current submission)	mary mary	7				0		Yes
<input type="checkbox"/>	Managing Editor	Flutter Shy	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes

Editor Discussion Forums

Editor Folder > Initiate Discussion > Submit (after Editor is selected)

Discussion Participants - Confirm Selections and Customize Letters

You have selected the following people to participate in this discussion. To change the letter sent, click the Letter drop-down box next to that person's name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

Click 'Customize' if you want to personalize a particular letter. 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 will be sent.

If there is a person in the list whom you do not want to participate in this discussion, check the Do Not Ask Editor to Participate box next to that person's name. When you click Send All Letters, that person will not be asked to participate in this discussion.

Editor Candidates

Name	Letter		Do Not Ask Editor To Participate
Princess Celestia (Managing Editor)	Discussion Forum Invitation ▾	Customize	<input type="checkbox"/>

Editor Discussion Forums

Editor Folder > Initiate Discussion > Submit (after Editor is selected)
> Editor Invited Confirmation

Discussion Participants Confirmation

An E-mail has been sent to the following Editors asking them to participate in the discussion:

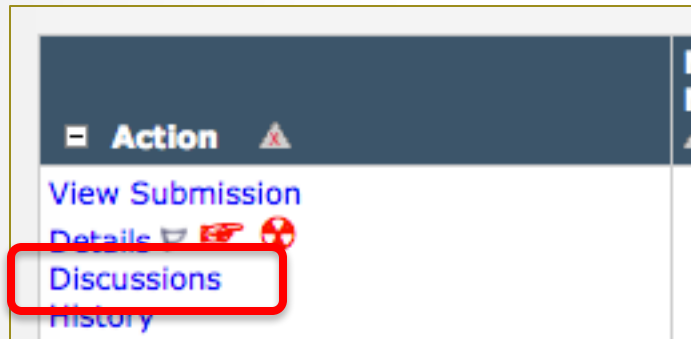
Princess Celestia (Managing Editor)

Close

Set Flag

Editor Discussion Forums

(invited to discussion) Editor Folder> Discussions (for the manuscript for which “he” has just been invited to discuss)



A screenshot of a navigation menu. The menu is titled "Action" and contains the following items: "View Submission", "Details" (with a dropdown arrow, a hand icon, and a plus icon), "Discussions" (highlighted with a red box), and "History".

Discussions for Manuscript Number: ABBEY1519

Andrew AuthorZwei

"Duis pharetra, arcu rhoncus consequat interdum, ex justo mattis sem, vel venenatis urna eros id nunc."

Action ▲	Topic ▲▼	Type ▲▼	Last Post Date ▲▼	Posted By ▲▼	Discussion Status ▲▼	Date Initiated ▲▼	Initiated By ▲▼	Initial Participant
View	Robin Of Kewl	Editor Consultation	29 Dec 2016	mary mary	Open	29 Dec 2016	mary mary	

Close

Start New Topic




Editor Discussion Forums

To configure instructions for the Editors for the Discussion forum: System Administration > Policy Manager > Discussion Forum > Configure Discussion Forum Settings

Discussion for Manuscript Number: ABBEY1519
Andrew AuthorZwei
"Duis pharetra, arcu rhoncus consequat interdum, ex justo mattis sem, vel venenatis urna eros id nunc."

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

Twiddley dee, Twiddley diddley dee Twiddley dee, Twiddley diddley dee Twiddley dee, Twiddley diddley dee Tweet, tweet, twiddley de He rocks in the treetops all the day long Hoppin' and a-boppin' and a-singing this song Every little bird, every little bee Loves to hear the robin go tweet-tweet-tweet Rockin' Robin, tweet, twiddley dee Rockin' Robin, tweet, twiddley dee Yeah go Rockin' Robin, really gonna rock tonight Every little swallow, every chick-a-dee Every little bird in the old oak tree Wise old owl, big black crow Put out their wings singing go bird go Rockin' Robin, tweet, twiddley dee Rockin' Robin, tweet, twiddley dee Yeah go Rockin' Robin, really gonna rock tonight

[Participant Summary](#) [View Submission](#) [File Inventory](#) [Add/Edit Submission Flags](#) [Details](#)   

Editor Discussion Forums

Editor Folder > Discussions (one already open & invited) > View

Topic:
Robin Of Kewl

Comments:

[View/Print All](#)

Participant	Comments	Date
mary mary	Sing if you can...	29 Dec 2016

[Post](#)

[Add Participants](#)

Editor Participants

Editor Participant	Role	# Posts	Latest Post	Participant Status	View Reviews and Comments	Download Files	View Draft Decision Letter	
Princess Celestia	Managing Editor	0		Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Send E-mail
mary mary	Managing Editor	1	29 Dec 2016	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Send E-mail

Editor Discussion Forums

System Administration > Policy Manager > Discussion Forums > Configure Discussion Topic Templates

Listed below are the Discussion Topic Templates configured for your publication. To create a new template, click the 'Add' button. ([more...](#))

Require Editors to choose a Discussion Topic Template on the Initiate Discussion page for an Editor Consultation discussion. If this checkbox is not selected, users can either type in a Topic and Initial Comment, or select a Topic template to pre-populate the Topic and Initial Comments boxes.

Save Changes

Add

Order	Type	Description	Actions	
<input type="text" value="1"/>	Editor Consultation	Master Topic Template	Edit	(Master)
<input type="text" value="2"/>	Editor Consultation	Ultimate Discussion	Remove	Edit
<input type="text" value="3"/>	Reviewer Consultation	Reviewer Consultation Demo Version 1	Remove	Edit

Update Order

Editor Discussion Forums

System Administration > Policy Manager > Discussion Forums > Configure Discussion Topic Templates (1st Half of page)

Add Discussion Topic Template

There are two types of discussions: Editor Consultation and Reviewer Consultation. The set of configuration options differs slightly for the two types. [\(more...\)](#)

Discussion Topic Template Type

[Open Special Character Palette](#)

Discussion Topic Template Name	<input type="text"/>
'Initiate Discussion' Page Custom Instructions	<input type="text"/>
Topic	<input type="text"/> <input type="checkbox"/> Allow user to modify Topic name when initiating a discussion
Initial Comments	<input type="text"/> <input type="checkbox"/> Allow user to modify Initial Comments when initiating a discussion

Editor Discussion Forums

System Administration > Policy Manager > Discussion Forums > Configure Discussion Topic Templates (2nd Half of page)

Default Editor Participant Permissions	<input type="checkbox"/> View Reviews and Comments <input type="checkbox"/> Download Files (source and companion) <input type="checkbox"/> View Draft Decision Letter
Editor Access to 'Details' Link	<input type="checkbox"/> Display 'Details' link in Submissions with Active Discussions folder and on Discussion page. Select the Details Page Layout that participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts.' <input type="text" value="Editorial Details Layout Configured for the Editor's Role"/>
Editor Discussion Letters	Select the Letter to send asking Editors to participate: <input type="text" value="None"/> <hr/> Select the notification letter to send to Editors when comments are posted: <input type="text" value="None"/> <input type="radio"/> Notify discussion initiator only <input type="radio"/> Notify all active Editor participants
Reviewer Discussion Letters	Select the Letter to send asking Reviewers to participate: <input type="text" value="None"/> <hr/> Select the notification letter to send to Reviewers when comments are posted. <input type="text" value="None"/>

Hide When you **Hide** a Discussion Topic Template, it will no longer be available for selection on the Initiate Discussion page.

Editor Discussion Forums

System Administration > Policy Manager > Discussion Forums > Configure Automatic Discussion Initiation

In the grid below, for each Article Type, you may specify the types of discussions to be opened automatically for a submission based on a Discussion Trigger. ([more...](#))

Cancel

Submit

Article Type	Discussion Trigger	Editor Agrees to Assignment	First Editor Confirmed			
Original Article - Ideal	<input type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: Select All Clear All <table border="1" data-bbox="1067 1001 1638 1139"><tr><td>Editor</td></tr><tr><td>Managing Editor</td></tr></table> Editor Consultation Topic Templates: <table border="1" data-bbox="1067 1210 1638 1253"><tr><td>Please Choose a Topic Template</td></tr></table>	Editor	Managing Editor	Please Choose a Topic Template	<input type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: <table border="1" data-bbox="1717 1001 2293 1043"><tr><td>Reviewer Consultation Demo Version 1</td></tr></table>	Reviewer Consultation Demo Version 1
Editor						
Managing Editor						
Please Choose a Topic Template						
Reviewer Consultation Demo Version 1						

Automatic DOI Assignment

...

Automatic DOI Assignment

- Production tracking feature that is available for EM-only sites
- Prefix +:
 - Manuscript number
 - Manuscript number.1
 - Incrementing number
 - Incrementing number no dash
- Enabled by your Aries Account Coordinator
- Select the event that will trigger automatic DOI assignment on the Configure Automatic DOI Assignment page:
 - 'Notify Author of Accept Decision'
 - or Initiate Production (if you have ProduXion Manager).

Manuscript Number:	EMUGKH-D-14-00001
DOI:	10.1234/EMUGKH-D-14-00001

Automatic DOI Assignment

System Administration > Policy Manager > Production Manager > Configure Automatic DOI Assignment

Configure Automatic DOI Assignment

Select the system event that will trigger Automatic DOI Assignment.

Event for Automatic DOI Assignment

Cancel

Submit

Any Questions?

- [Author Main Menu Structure](#) (Help)
- [File Upload options](#) (Help)
- [PowerGrid](#) - Video
- [Sharing saved Searches](#)- Video
- [Reviewer Selection](#) (Help)
- [Email ingest service](#) (Help)
- Reviewer PDF & PDF download security
- [Editor Discussion Forum Video](#)
- [Automatic DOI Assignment](#) (Help)