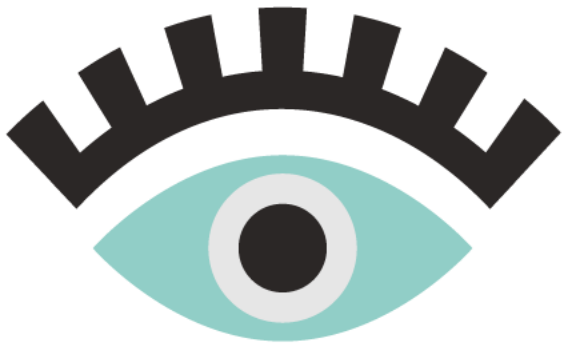# EM Boot Camp

Editorial Manager basics, tips, and tricks

Anna Walton
Account Manager
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EEMUG 2020

#EEMUG2020

Sampling of EM Features and Functionality

Please ask questions as we go along!

HOW SHOULD I ANSWER THAT QUESTION?

If i eat myself would i become twice as big or disappear completely?

Scott Kennymore   2 years ago   Report Abuse

Best Answer - Chosen by Voters
That just blew my mind.

Sergio   2 years ago   Report Abuse

100% 1 Vote

6 people rated this as good

BOOTCAMP AGENDA:

- Welcome
- Basic EM Structure
- A Brief Overview of System Administration
- ➢The Author Submission Process: a walkthrough.
- ➢Editorial Functionality: editor chains, editor designations.
- ➢Reviewer Functionality: How to search for and invite reviewers.
- Communicating with your users
- Basic Reporting: Saved searches, creating custom reports, searching people and submissions.
- Resources: How to utilize the "Help" link and the Aries video tutorial library; contacting your account coordinator.
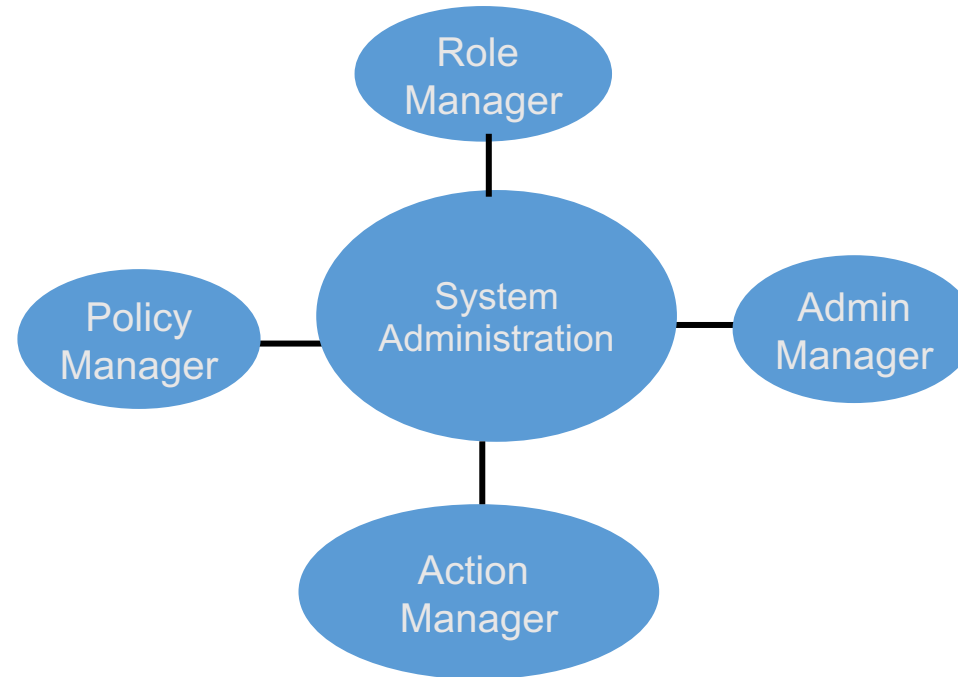
Basic EM Structure

How Editorial Manager is Organised
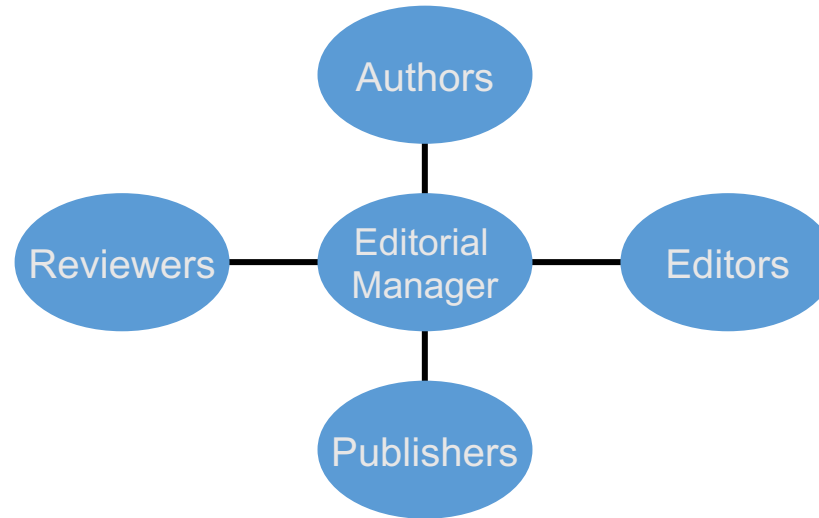
- There are 4 role families: Authors, Editors, Reviewers and Publishers.
- The author role is the default user role; one person can only be assigned one role from each of these role families.
- Roles are created and permissions assigned in RoleManager.

How System Administration is Organized

- RoleManager – Roles are configured and permissions assigned.
- PolicyManager – General Configurations.
- ActionManager – Who gets what letter at what event.
- AdminManager – Share data, Transfer submissions, Share letters.

A Brief Overview of System Administration

How System Administration is Organized

Administrative Functions

System Administrator Functions

Register New User

Reports

Send Reminder Letters

Send Batch E-mail

- The Administrative Functions section will appear at the bottom of the Editor main menu for those Editors with either full or restricted access to System Administration.

Role Manager

RoleManager

Author Role
Reviewer Role
Editor Role
Publisher Role

Managing Editor	Remove Edit Copy
Editor (by invitation)	Remove Edit Copy
Editorial Assistant - with tech check	Remove Edit Copy
Super User (all access)	Remove Edit Copy
Editor-in-Chief	Remove Edit Copy

Training and Demo Site

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Edit Role Definition

Role Name:* [Managing Editor]

Maximum Role name is 40 characters.

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

Expand All   Collapse All

☐ **New Submissions**

☑ Receive New Submissions in 'New Submissions Requiring Assignment' Folder

☑ Perform Technical Check (submission received in 'New Submissions' Folder)

☑ Submit Early Decision on New Submissions

☑ Receive New Transferred Submissions in 'Transferred Submissions' Folder

☑ Submit Manuscript as an Editor

☑ Restrict to 'Editor/Publisher Use Only' Article Types

☑ Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types

☐ **Editor Assignment**

☑ Receive Assignments

Classic Method of Editor Assignment

◉ Receive Assignments without Invitation

○ Receive Invitations for Assignments

Action Manager

Training and Demo Site

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

ActionManager

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

Document Status
Author Letters
Test Reviewer Letters
Reviewer Letters
Managing Editor Letters
Editor (by invitation) Letters

- There are a fixed set of events that can trigger a letter.

- Each role can have its own letters configured.

Action Manager Events Quick Reference Guide

https://www.editorialmanager.com/robohelp/16.0/index.htm#t=ActionManager_Events_Quick_Reference_Guide.htm&rhsearch=actionmanager&rhhlterm=actionmanager&rhsyns=%20

Action Manager

ActionManager **Author Letters**

Registration

Event	Author Letters
New User Registers	Welcome
Forgot Username or Password	Send Username and Password
Forced Username Change	NONE
Merged Duplicate Users	Merge Duplicate User Notice
User is Made Inactive	NONE
Proxy Register New User	Proxy Registration Notice to Registrant

Author Submission

Event	Author Letters
Incomplete Submission by Author	NONE
Author Removes Submission	NONE
Building PDF for Author	NONE
Author PDF Build Error	Author PDF Build Error
Original PDF Built by Author	PDF Built and Requires Approval
Revised PDF Built by Author	PDF Built and Requires Approval

Action Manager

Reviewer Assigned

Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	*Original Submission:* Reviewer Invitation *Revision - Re-Invite:* Reviewer Invitation on Revision *Revision – First Invite:* Reviewer Invitation - Revision: First Invite Select Letters
Reviewer Assigned (Not Invited)	*Original Submission:* Reviewer Assignment Letter *Revision - Re-Invite:* Reviewer Assignment Letter *Revision – First Invite:* Reviewer Assignment Letter Select Letters
Reviewer Agree	*Original Submission:* NONE *Revision - Re-Invite:* NONE *Revision – First Invite:* NONE Select Letters
Reviewer Decline	NONE
Review Due Date Changed	Reviewer Instructions and Due Date
Un-invite Reviewers Before Agreeing to Review	NONE
Un-assign Reviewers After Agreeing to Review	NONE

Policy Manager

Training and Demo Site

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

PolicyManager Main Menu

Expand All   Collapse All

⊞ **Registration and Login Policies**
⊞ **Status Policies**
⊞ **Submission Policies**
⊞ **Questionnaire Policies**
⊞ **Additional Data Policies**
⊞ **Editor Assignment Policies**
⊞ **Suggest Editor Policies**
⊞ **Reviewer and Editor Form Policies**
⊞ **E-mail and Letter Policies**
⊞ **General Policies**
⊞ **Discussion Forums**
⊞ **Linked Submissions Policies**
⊞ **Conference Submission Policies**
⊞ **Transmittal Policies**
⊞ **ProduXion Manager**

Policy Manager – Submission Policies – Edit Article Types

PolicyManager Main Menu

Expand All   Collapse All

⊞ **Registration and Login Policies**
⊞ **Status Policies**
⊞ **Submission Policies**
⊞ **Questionnaire Policies**
⊞ **Additional Data Policies**
⊞ **Editor Assignment Policies**
⊞ **Suggest Editor Policies**
⊞ **Reviewer and Editor Form Policies**
⊞ **E-mail and Letter Policies**
⊞ **General Policies**
⊞ **Discussion Forums**
⊞ **Linked Submissions Policies**
⊞ **Conference Submission Policies**
⊞ **Transmittal Policies**
⊞ 🔴**ProduXion Manager**

PolicyManager Main Menu

Expand All   Collapse All

⊞ **Registration and Login Policies**
⊞ **Status Policies**
⊟ **Submission Policies**
   Edit Article Types
   Edit Submission Items
   Configure Color Codes for Companion Files
   Edit Sections/Categories
   Set
   Edit
   Edit
   Def
   Cor
   Sele
   Set

Edit Article Types

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

Order	Article Type	Article Type Family	Invited	Editor/Publish Use Only			
1	Quick Submission	Regular			Remove	Edit	Copy
2	Original Study	Regular			Remove	Edit	Copy
3	Editorial	Regular			Remove	Edit	Copy

Policy Manager – Email and Letter Policies – Edit Letters

PolicyManager Main Menu

Expand All   Collapse All

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

    Edit Letters
    Define Custom Merge Fields
    Set "Email From" Address
    Manage Preferred Method of Contact Settings
    Configure Waiver Request
    Configure Email Import
    Set Notify Author Blinding Policy
    Set Notify Editor Preference

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
X Reject and Transfer	Decision		◉	Edit	○	Edit	Remove | Hide
X Author Reminder Report Test Letter	Author Reminder		◉	Edit	○	Edit	Remove | Hide
Welcome Letter - Go Live	Batch E-mail		◉	Edit	○	Edit	Remove | Hide
Welcome	General	Author - New User Registers	◉	Edit	○	Edit	Remove | Hide

Admin Manager

Training and Demo Site

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

AdminManager Main Menu

Set Live Journal Flag

Configure Enterprise Analytics Reporting Menus

Set Default Target FTP Site for Extract of Conference Submissions

Share People

Configure Shared Letters Management

Configure Cross-Publication Submission Transfer

View File Transfer Statistics

Configure Restricted System Administration Access Rights

Configure Manuscript Service Providers for Ingest Service

- Set your site live
- Configure transfers
- Share people (portal functionality)
- Share Letters
- Configure Restricted System Administration Access

The Author Submission Process

A walkthrough

Author Main Menu

- After logging in as an author, the user can begin the new submission process by clicking "Submit New Manuscript" in the Author Main Menu

Author Main Menu

- If the author goes to submit a new manuscript when they still have a submission that hasn't been completed yet, they will be asked via pop-up message if they're trying to submit a previously un-completed submission.

The Author Submission
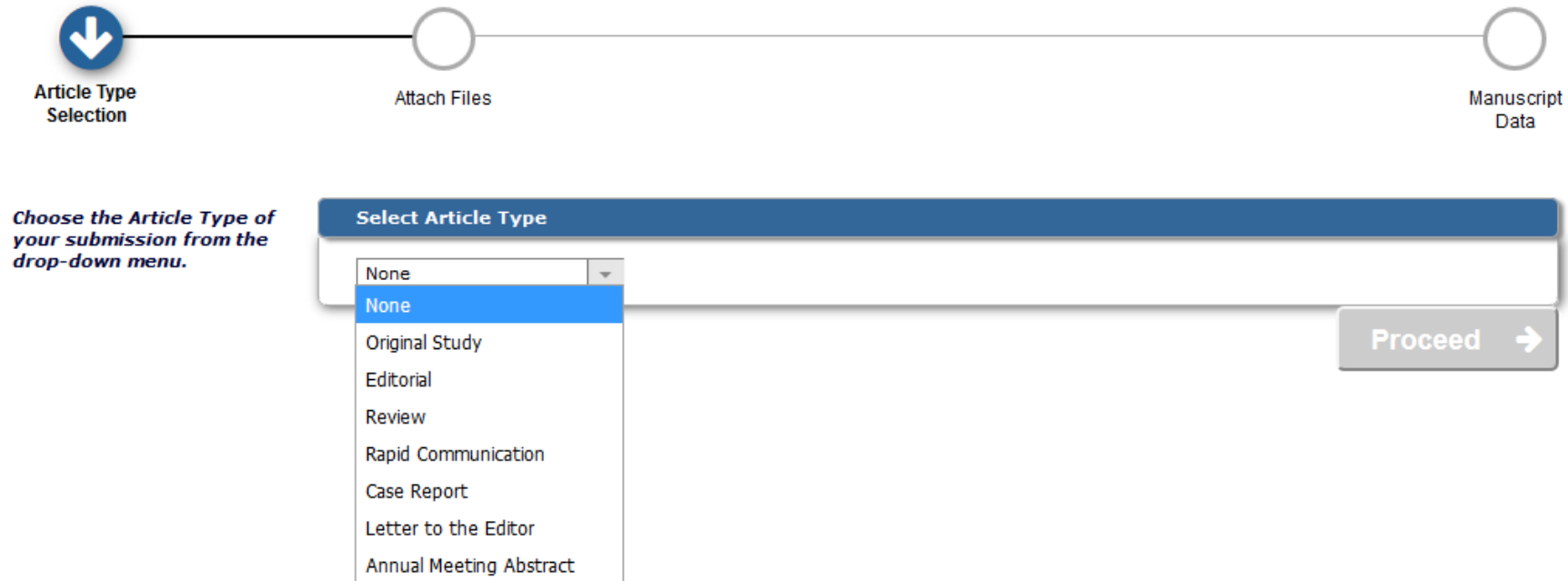
- Each step of the submission process has customizable submission instructions.
- The list of available article types is configured by the publication.
- Each article type can have differently configured submission steps/items.

Article Type

- Authors Can Select an Article Type from this dropdown menu, then upload their source files by clicking "Proceed".
- Article types will always be a required submission step; this is non-configurable.

Attach Files

- Notice that completed submission steps are highlighted with a green checkmark.
- Authors may upload files by browsing their computer or dragging and dropping them onto the page.

Uploading And Naming Source Files

- The author must upload one manuscript file. While the author moves through the submission process, EM attempts to extract :

➢ Manuscript title

➢ List of authors

➢ Abstract

➢ Key words

- Note: If you want to use the Extract feature, you must upload your manuscript as a Word file.

- Authors can upload

➢ Zip files – We can unpack or not

➢ URLs

➢ Supplemental material (movies)

- You can restrict the types of files that authors upload at submission.

General Information

- General Information" is where region of origin, section/category, keywords and classifications for the submission are collected. The new collapsible menu enables authors to view either one section at a time or all sections at once. You can expand each new section by clicking the + sign or "Next".

Compressed "General Information" Menu vs. Uncompressed "General Information" Menu

Additional Information

- Selecting a section or category for a submission allows the editorial office to group submissions with similar topics or structures together.
- The Section/Category submission step can also be used in conjunction with Editorial Manager's Direct-to-Editor functionality.
- Direct to editor functionality allows the submission to be directly assigned to a specific editor bypassing the need for manual editor assignment.

Keywords

- Keywords are free form terms that can be used to identify the area(s) of study found in the submission.
- You can restrict the number of keywords an author is allowed to enter.
- Keywords are searchable, and can be used by the editorial office to match submissions with qualified reviewers.

Classifications

Edit Classifications

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

View Selection and Display Policies

Add Classification

Insert Special Character

+ Region Of Origin

+ Section/Category

+ Keywords

– Classifications

Please identify your submission's areas of interest and specialization by selecting one or more classifications.

Select up to 2 Classification(s)
(None Selected)

Add Classifications

↓ Next

← Back   **Proceed** →

Search

Search   Clear
Matching terms display in red text

Active Classifications

Expand All   Collapse All
Remove   Edit   10:First Major Term
Remove   Edit   20:Second Major Term
Remove   Edit   30:Third Major Term
Remove   Edit   40:Tea
    Remove   Edit   40.10:Ceylon
    Remove   Edit   40.20:Darjeeling
    Remove   Edit   40.30:Oolong
    Remove   Edit   40.40:Puerh

- Classifications are terms from the journal's taxonomy that can be associated with the submission.
- Searching for reviewers by classifications can match submission content with reviewer expertise.
- Removes the risk of typos etc.
- A classifications list can be hierarchical, with a major term (e.g. "Tea") being followed up with a subset of minor terms (e.g. "Darjeeling", "Ceylon")

Reviewer Preferences

- The publication can allow authors to suggest reviewers for their submission.

Reviewer Preferences

- The required fields for this step can be configured by the editorial office.
- Note that this does not register this reviewer into EM; it's merely a suggestion to the publication.
- The editor does not have to use the recommendations.

Reviewer Preferences

- Authors can also suggest reviewers who should <u>not</u> review their submission. The same information fields are available as for suggesting a reviewer.
- This does not prevent an editor from using this person – it's at their discretion.

Additional Information

Questionnaire

Please confirm you have approval from all Co-authors to submit this manuscript?

Answer Required: Yes ▼

Please enter the **Word Count** of your manuscript

567

On a scale of 1-5, how would you rate this submission, 5 being the best, 1 being the worst?

Answer Required:
- ○ Please select a response
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ● 5

Why do you think your submission is perfect?

Answer Required: Character Count: 13
because it is   Limit 200 characters

- Questions and questionnaires are configured in PolicyManager.

- Question responses can be configured in a variety of formats, from text boxes, to numerical ratings systems, to checkboxes with pre-written responses.

- Questions can be configured to be required or optional.

- Question responses can be associated with submission flags.

Comments

- Comments that authors have for the editorial office can be entered here.
- Many use it to enter a cover letter.
- It can also be used to enter any additional information.

Missing Required Information

- When an author doesn't submit information into a required field, the step missing the required entry will glow red with a white exclamation mark. If this reminder isn't heeded, a window will pop up instructing the author to go back if they try to build the PDF in the last step.

Manuscript Data

- EM has been able to extract article info from the manuscript doc, such as title, abstract and author list.

- If this information wasn't able to be extracted, it can still be entered manually.

- Authors have the ability to add co-authors here, and even promote them to first author or make them the corresponding author.

Manuscript Data

- Co-authors can also be added and promoted to first and/or corresponding author from the Manuscript Data step.

- To promote to first author, you can use the blue bars to drag and drop the co-author's name to the top of the author list.

- The corresponding author of a submission must register/be registered in EM.

- You can configure the option to list a co-author's contribution role to the submission, which is driven by CRediT Taxonomy.

- You can even list the degrees of each contribution, be it Supporting, Equal or Lead.

Manuscript Data

- Funding information can be added as a required or optional step.

- Users can enter the funding institution, award number and grant recipient, or simply click "Funding Information is Not Available"

Building the PDF

Build PDF for Approval →

Warning

You cannot complete your submission until the following requirements are met (click on the bold text to be navigated to the appropriate step):

The **Abstract** is missing.

Required information is missing from the **Funding Information** step.

OK

ng Source

- Once all manuscript data steps have been filled out, you can build your submission's PDF.

- Two PDFs are built here- one for Authors and Editors, and another for Reviewers.

- The Reviewer PDF will have less information than the Author/Editor PDF- it just has the essentials.

- EM will not build the submission's PDF if there are required fields that are missing information. You'll receive a reminder pop-up that specifies what information is missing.

Approving the PDF

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

⊞ Action ▲	Title ▲▼	Date Submission Began ▲▼	Status Date ▲▼	Current Status ▲▼	This column header can be customized with links to outside websites e.g. ethical rules etc.
Action Links	Author Submission Demo	Apr 30, 2018	Apr 30, 2018	Needs Approval	☑ I accept

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

- Once the PDF has been built, the author will need to view the submission and check the "I Accept" box. This will allow them to approve the submission, sending it to the editorial office.

- The "I Accept" Box can be configured to host resource links that the author can use for assistance.

- The Author PDF contains all the metadata captured during the submission process, as well as the source files placed in the order in which they were uploaded or sorted by the author.

JC Demo 14.1
Author Submission Demo
--Manuscript Draft--

Manuscript Number:	
Full Title:	Author Submission Demo
Short Title:	
Article Type:	Original Study
Section/Category:	Basic Science Section
Keywords:	Hockey
Corresponding Author:	Zdeno Chara Smithsonian Institution UNITED STATES
Corresponding Author Secondary Information:	
Corresponding Author's Institution:	Smithsonian Institution
Corresponding Author's Secondary Institution:	
First Author:	Zdeno Chara
First Author Secondary Information:	
Order of Authors:	Zdeno Chara
Order of Authors Secondary Information:	
Manuscript Region of Origin:	UNITED STATES
Abstract:	This is a test abstract
Suggested Reviewers:	Kenny Chesney

Author/Editor PDF vs. Reviewer/Editor PDF

JC Demo 14.1
Author Submission Demo
--Manuscript Draft--

Manuscript Number:	
Full Title:	Author Submission Demo
Short Title:	
Article Type:	Original Study
Section/Category:	Basic Science Section
Keywords:	Hockey
Corresponding Author:	Zdeno Chara Smithsonian Institution UNITED STATES
Corresponding Author Secondary Information:	
Corresponding Author's Institution:	Smithsonian Institution
Corresponding Author's Secondary Institution:	
First Author:	Zdeno Chara
First Author Secondary Information:	
Order of Authors:	Zdeno Chara
Order of Authors Secondary Information:	
Manuscript Region of Origin:	UNITED STATES
Abstract:	This is a test abstract
Suggested Reviewers:	Kenny Chesney

JC Demo 14.1
Author Submission Demo
--Manuscript Draft--

Manuscript Number:	DEMOJC141-D-18-00029
Full Title:	Author Submission Demo
Article Type:	Original Study
Section/Category:	Basic Science Section
Keywords:	Hockey
Manuscript Region of Origin:	UNITED STATES
Abstract:	This is a test abstract

- Both authors and reviewers receive separate PDFs.
- PDF cover pages are configurable.
- Editors can have access to both PDFs.
- You can configure what submission items are visible on both PDFs.

Submissions Being Processed Folder

New Submissions

Submit New Manuscript

Submissions Sent Back to Author (0)

Incomplete Submissions (3)

Submissions Waiting for Author's Approval (0)

Submissions Being Processed (2)
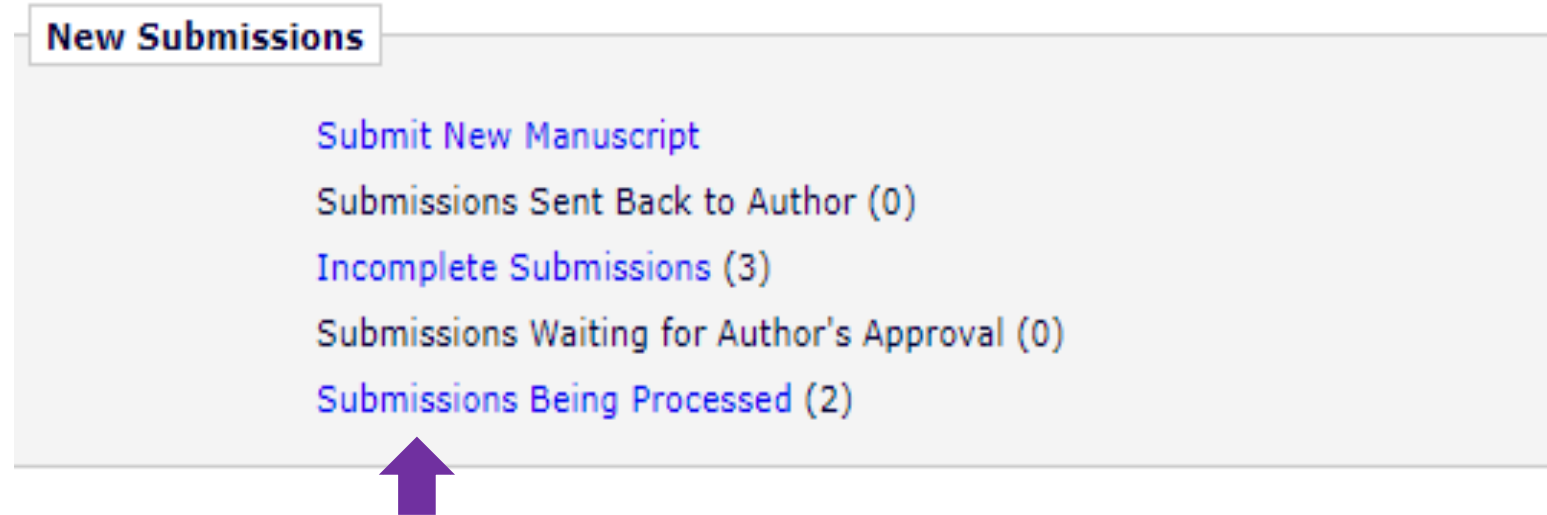
- Once approved, the submission will now be visible to the author in the "**Submissions Being Processed**" folder in the author main menu.

CONGRATULATIONS!

Keep Smiling

You've successfully submitted a manuscript in Editorial Manager!

CONGRATULATIONS!!
HIGH FIVE!

Now, let's take a break.

Editorial Functionality

Early Decision, Assigning an Editor, Making a Decision

Editor Main Menu

- The submission is now in the Editor's Main Menu in the To Do List: either in *New Submissions* or *New Submissions Requiring Assignment*.

- Clicking on either of these links will take the Editor to the Action Grid.

Early Decision

Version 15.0

Early Decision

View Submission							
Duplicate Submission Check (56%)							
Details ⚐ 🙂							
Initiate Discussion							
History							
Submit Early Decision							
Technical Check							
File Inventory	DEMOAW.2018.0	Original Study	Basic Science Section	Research Proposal - EEMUG Submission 1	Anna Walton Ⓓ ⚐	Dec 06, 2018	Dec 06, 2018	Manuscript Submitted
Edit Submission							
Send Back to Author							
Remove Submission							
Classifications							
Set Final Disposition							
Initiate Production							
Send E-mail							
Linked Submissions							
Search Publons Reviewer Finder							

- This allows Editors/editorial staff (with permission) to submit early decisions on new submissions without assigning an Editor.
- This can be configured for any (or all) decision terms, not only the Reject decision, also Accept, Revise, and Reject and Transfer.

Early Decision

Submit Early Decision
Manuscript Number: DEMOAW.2018.0023
"Research Proposal – EEMUG Submission 1"

Please select an Editor to be associated with the early decision.

○ Assign to Me

◉ | All Editor Roles ▾ | Select Editor: | Eddie Editor ▾ |

Decision: | Please Select |
| Accept |
| Minor Revision |
| Revise |
| Reject |
| Immediate Reject |
| Reject and Transfer |

Editor Decision Phrases

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

[Preview Selected Phrases]

Select	Phrase
☐	This is a good paper.
☐	The reviewers have reviewed your work and generally their reviews are positive. We are pleased to tell you we will accept your submission once the changes detailed by the reviewers and editors have been made.
☐	The reviewers have evaluated your paper and have recommended some changes.
☐	I am sorry to tell you that your submission has not been successful.
☐	Your submission to our journal has not been successful. The reason for this is….

Comments to Author

- The Admin or Editor needs to select an Editor to be associated with the decision - they can "Assign to Me" or select another editor.

- If using Editor Decision Phrases these can be incorporated.

Early Decision

Decision: Revise ▾

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**

☐ This is a good paper.

☐ The reviewers have reviewed your work and generally their reviews are positive. We are pleased to tell you we will accept your submission once the changes detailed by the reviewers and editors have been made.

☐ The reviewers have evaluated your paper and have recommended some changes.

☐ I am sorry to tell you that your submission has not been successful.

☐ Your submission to our journal has not been successful. The reason for this is....

Comments to Author

Insert Special Character | Open in New Window

Please make the following changes and submit your revised paper:

1. On page 4 line 3...

2. On page 7, line 17....

I look forward to seeing a revision of this submission

Cancel   Proceed

As with normal decisions "*Comments to Author*" can be added.

Early Decision

Notify Author

Manuscript Number:
DEMOAW.2018.0023

Title: Research Proposal - EEMUG Submission 1

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.

Cancel

Preview Letter   Save   Save and Close   Send Now

Date Revision Due:	01/05/2019 ▦ (mm/dd/yyyy)
Editor Decision:	Revise
Modify Decision:	Revise ▾
Rescind Decision:	Return to Editor
From:	"Anna Demo 15.0 Site"<awalton@ariessys.com>
To:	Anna Walton
Letter Purpose:	Editor Decision - Revise
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

☐   ☐   Eddie Editor (Editor)

cc: [ ]

bcc: [ ]

Letter Body: Insert Special Character | Insert Custom Merge Field Open in New Window

If you decide to revise the work, please submit a list of changes or a rebuttal against each point which is being raised when you submit the revised manuscript.

Your revision is due by %DATE_REVISION_DUE%.

To submit a revision, go to https://demoaw.editorialmanager.com/ and log in as an Author. You will see a menu item call Submission Needing Revision. You will find your submission record there.

Yours sincerely

Eddie Editor
Editor
DEMO AW Site

Editors' comments:

Please make the following changes and submit your revised paper:

1. On page 4 line 3...

2. On page 7, line 17....

I look forward to seeing a revision of this submission

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:

- The Editor or Admin can then draft and send the decision letter in the usual way.

Early Decision

Notify Author Confirmation

The Author Notification Letter 'Your Submission' has been e-mailed to:

Anna Walton   awalton@edmgr.com

Close

- The decision has been set and the author notified.
- Saves time as for submissions which are out of scope or need immediate revision before peer review as the Admin or Editor can set the decision without the additional steps of assigning an editor.

Early Decision - Configuration

Editor Decision Term: Minor Revision

Author Notification Letter Options:

Default	Optional	Letter Purpose
○	☐	None Selected
○	☐	Editor Decision - Accept
○	☐	Editor Decision - Reject
◉	☑	Editor Decision - Revise

Reviewer Notification Letter: Reviewer Notification of Revise Decision ▾

Document Status   Revise ▾

Decision Family: Revise ▾

☑ Allow Early Decision When you select **Allow Early Decision**, the Editor Decision Term will be available on the Submit Early Decision page.

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

Cancel   Submit

- In System Administrator Functions > Policy Manager > Editor Decision Policies > Edit Editor Decision Terms
- Click the "*Edit*" link next to the decision term(s) to be included in the early decision options.
- On the Add/Edit Editor Decision Term page, check the box next to "*Allow Early Decision*".
- When finished, click Submit to save.

Early Decision - Configuration

Editor Decision Terms

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

Cancel   Add New Term

Update Order

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Alternative Text for Authors	Decision Family	Allow Early Decision		
1	Accept	Editor Decision - Accept	None	Accept		Accept		Remove	Edit
2	Minor Revision	Editor Decision - Revise	Reviewer Notification of Revise Decision	Revise		Revise	✓	Remove	Edit
3	Revise	Editor Decision - Revise	None	Revise		Revise	✓	Remove	Edit
4	Reject	Editor Decision - Reject	None	Reject		Reject		Remove	Edit
5	Immediate Reject	Editor Decision - Reject	None	Reject		Reject	✓	Remove	Edit
6	Reject and Transfer	Editor Decision - Reject	None	Transfer Pending		Reject and Transfer	✓	Remove	Edit

Update Order

Cancel   Add New Term

- On the main Editor Decision Terms page, all terms that have been designated for use with this feature have a checkmark in the "Allow Early Decision" column.

- These terms will appear in the drop-down menu on the Submit Early Decision page.

Early Decision - Configuration

Edit Role Definition

Role Name:* Managing Editor

Maximum Role name is 40 characters.

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

Expand All   Collapse All

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

⊟ **Editor Assignment**
- ☑ Receive Assignments in 'New Assignments' Folder

- In System Administrator Functions > Role Manager > Editor Roles
- Select the appropriate Editor role and click Edit.
- On the Edit Role Definition page, in the **New Submissions** section, check the box for:
1. The permission: *Receive New Submissions in "New Submissions Requiring Assignment Folder"*
2. The sub-permission: *Submit Early Decision on New Submissions*
- When finished, click Submit to save.

Assigning an Editor

- If not setting an Early Decision, when you have a submission that's ready to go, you can assign an Editor.
- Use the Action Link: this will open the Assign Editor Page.
- Your options for assigning are shown to you: from there, choose your candidate.
- You can also blind Editors from here.
- Clicking on either of these links will take the Editor to the Action Grid.

Editor Chain

Editors	
Name:	mary mary ⚐ [Proxy]
Role:	Managing Editor
Date Assigned:	06-06-2018
Date Completed:	
Elapsed Days:	0
Recommendation:	
Name:	Claire Commentator ⚐ [Proxy]
Role:	Editor
Date Assigned:	06-06-2018
Date Completed:	
Elapsed Days:	0
Recommendation:	
Name:	Edwin Expert ⚐ [Proxy]
Role:	Editor-in-Chief
Date Assigned:	06-06-2018
Date Completed:	
Elapsed Days:	0
Recommendation:	

- Here's an example of an Editor Chain on a Details page of a paper.
- Edwin Expert is currently the Handling Editor.

Editor Terminology
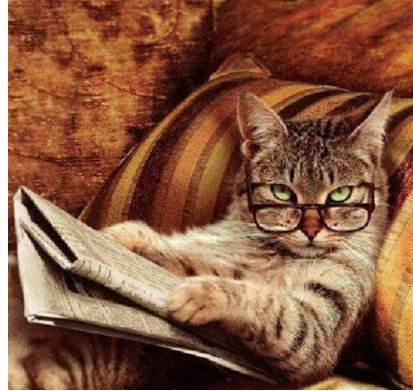
- An '**Attached Editor**' is the Editor who picks up a new or revised submission and assigns the first Editor. Generally a editorial office person. They have a 'Special Relationship' with the submission, although they are not assigned to it.

- '**Handling Editor**' is the Editor with current responsibility for the submission.

- '**First Editor**' is the Editor who was first assigned to the submission and may or may not also be the Handling Editor.

- '**Assigned Editor**' is any Editor who is assigned to the submission and is in the list of Editors on the Details page. The Assigned Editor can be the First Editor, the Handling Editor, or any other Editor in the Editor Chain.

- '**Corresponding Editor**' is the First Editor, unless the 'Corresponding Editor' setting is changed on a submission's Details page.

Details, Details

Details for Manuscript Number: WEBDEM-D-18-00009 "Standing by Your Man: it's Overrated"

Cancel   Save   Save and Close

Abstract   Manuscript Notes   Production Notes   Editors   Reviewers   Alternate Reviewers   Reviewers Proposed by Editors   Additional Information

Corresponding Author:	Tammy Wynette BAHAMAS [Proxy]
Corresponding Author E-Mail:	trash1@ariessys.com
Author Comments:	
Global MS ID:	EM_WEBDEM_556
Short Title:	
Article Type:	Original Study
Section/Category:	Clinincal Section
Keywords:	
Classifications:	Vermont Mountains; Mount Hunger
Requested Editor:	
Technical Check:	Technical Check Information
Initial Date Submitted:	Jun 05, 2018
Editorial Status Date:	Jun 06, 2018
Current Editorial Status:	Under Review
Submission Target Publication Date:	(mm/dd/yyyy)
Submission Target Volume:	
Submission Target Issue:	
Transmittal Form:	Link to Transmittal Form
Author Days To Revise:	30
Final Disposition Term:	
Corresponding Editor:	Ellen Editor, PHD, Editor [Proxy]
Abstract:	

After all, he's just a man.

- This is the Details page, which is accessible via the submission's Action Links.
- It compiles all the key pieces of information about the submission.
- It is configurable: you can show the information that is important to your workflow.
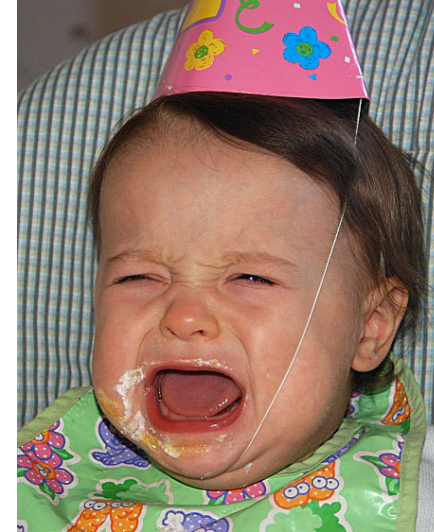
Reviewer Functionality

How to search for and invite reviewers

Invite or Assign?

- In EM, there is the option to either INVITE or ASSIGN Editors and Reviewers. What's the difference?

- Inviting an Editor or Reviewer allows them to accept or decline an invitation to participate.

- Assigning an Editor or Reviewer assumes the participant's agreement!

- Just as you can un-invite someone, you can also un-assign them.

- Whether you are invited or assigned depends on your role permissions.

Reviewer Selection Summary Page

- This is a useful page that allows you to manage everything Reviewer-related in one place.
- In the Review Settings section, you can override the default article type settings.
- You can conduct all your searches for Reviewers from the Reviewer Search box.

Reviewer Search and Selection: is it me you're looking for?

- There are a number of ways to search for reviewers using EM:
- ➤ Standard search – plug in first/last name, email address. Great if you know who you're looking for…
- ➤ Suggested by Author
- ➤ Search by Classification Matches
- ➤ Search by Personal Classifications
- ➤ Search the Entire Database – everyone who is AND isn't a Reviewer.

Options for Inviting Reviewers

Select As

Inv.	Asn.	Alt.	Prop.
☐	☐	☐	☐

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers

Arnold Appraiser (Reviewer) ⚐	Agreed to Review 16-05-2018	Un-assign
Claire Commentator (Reviewer) ⚐	Agreed to Review 16-05-2018	Un-assign
Charles Critic (Reviewer) ⚐	Reviewer Invited 16-05-2018	Un-invite
Cressida Darwin (Reviewer) ⚐	Reviewer Invited 16-05-2018	Un-invite
Sarah Conacher (Reviewer) ⚐	Reviewer Invited 16-05-2018	Un-invite

Alternate Reviewers

Mimi Dolphin (Reviewer) ⚐

Alternate Reviewer Invitation Letters

Alternate Reviewers will be promoted automatically. (more...)

Proposed Reviewers

☑ Display Proposed Reviewer Flag ▶

Name	Proposed By	Date Proposed	Notes	Invite	Alternate
Edwin Expert (Reviewer) ⚐	mary mary	16-05-2018		☐	☐

- There are plenty of options:
- **Assigning**: assumes the Reviewer has already agreed to complete a review.
- **Alternate Reviewers**: allows you to automatically promote Reviewers if others decline.

Alternate Reviewers can be linked to specific invited Reviewers.

- **Proposed Reviewers**: Allows an Editor to create a list of potential Reviewers who can be invited later.

Reviewers suggested by Author

Reviewers Suggested By Author
Adam Ant, adam@ariestrash.com;

Re

Select a checkbox by each person you wish to select as

Page: 1 of 1 (1 total Reviewers)

Select As				Reviewer
Inv.	Asn.	Alt.	Prop.	Name
☐	☐	☐	☐	Adam Ant ⚐ (Reviewer)

This publication:
Author may have suggested this reviewer; an email match was found.
Proposed Reviewer for 1 other submission

- EM locates existing Users/ Reviewers suggested by the author in the journal database.
- Allows you to Register and Select New Reviewer from scratch if the person is not already in the system.

Reviewer Search and Selection: Classification Matches

Page: 1 of 1 (3 total Classification matches)　　Display [10 ▼] results per page.

Classification		Number of Reviewers
☐ 1	EMUG Presentations	5
☐ 1.01	Introduction to EAR	3
☐ 1.02	EM Bootcamp	5

Page: 1 of 1 (3 total Classification matches)　　Display [10 ▼] results per page.

Inv.	Asn.	Alt.	Prop.	Name	Member	Classifications	(Agreed Invitations)		Invitation Statistics	
☐	☐	☐	☐	Abby Olivia Author　(Reviewer)	No	**2 Class match with MS** * 1: EMUG Presentations * 1.02: EM Bootcamp	**Reviews in Progress:**	0	**Date Last Invited:**	-
							Completed Reviews:	0	**Outstanding Invitations:**	0
							Un-assigned After Agreeing:	0	**Agreed:**	0
									Declined:	0
							Terminated After Agreeing:	0	**Un-invited Before Agreeing:**	0
							Last Review Agreed:	-		
							Last Review Completed:	-	**Terminated:**	0
							Last Review Declined:	-	**Total Invitations:**	0
							Avg Days Outstanding:	0		
							Manuscript Rating:	0		
							Avg Review Rating:	0.0		
Inv. ☐	Asn. ☐	Alt. ☐	Prop. ☐	Charles Critic　(Reviewer) **This publication:** Author may have suggested this reviewer; a match on first and last name was found.	No	**3 Class match with MS** * 1: EMUG Presentations * 1.01: Introduction to EAR * 1.02: EM Bootcamp	**Reviews in Progress:**	0	**Date Last Invited:**	-
							Completed Reviews:	0	**Outstanding Invitations:**	0
							Un-assigned After Agreeing:	0	**Agreed:**	0
									Declined:	0
							Terminated After Agreeing:	0	**Un-invited Before Agreeing:**	0
							Last Review Agreed:	-		
							Last Review Completed:	-	**Terminated:**	0
							Last Review Declined:	-	**Total Invitations:**	0
							Avg Days Outstanding:	0		
							Manuscript Rating:	0		
							Avg Review Rating:	0.0		

Reviewer Search and Selection: Classification Matches

Page: 1 of 1 (3 total Classification matches) Display 10 ▾ results per page.

Classification		Number of Reviewers
☐	1 EMUG Presentations	5
☐	1.01 Introduction to EAR	3
☐	1.02 EM Bootcamp	5

Page: 1 of 1 (3 total Classification matches) Display 10 ▾ results per page.

Inv.	Asn.	Alt.	Prop.	Name	Member	Classifications	(Agreed Invitations)		Invitation Statistics	
☐	☐	☐	☐	Abby Olivia Author (Reviewer)	No	**2 Class match with MS** * 1: EMUG Presentations * 1.02: EM Bootcamp	Reviews in Progress:	0	Date Last Invited:	-
							Completed Reviews:	0	Outstanding Invitations:	0
							Un-assigned After Agreeing:	0	Agreed:	0
									Declined:	0
							Terminated After Agreeing:	0	Un-invited Before Agreeing:	0
							Last Review Agreed:	-		
							Last Review Completed:	-	Terminated:	0
							Last Review Declined:	-	Total Invitations:	0
							Avg Days Outstanding:	0		
							Manuscript Rating:	0		
							Avg Review Rating:	0.0		
☐	☐	☐	☐	Charles Critic (Reviewer) **This publication:** Author may have suggested this reviewer; a match on first and last name was found.	No	**3 Class match with MS** * 1: EMUG Presentations * 1.01: Introduction to EAR * 1.02: EM Bootcamp	Reviews in Progress:	0	Date Last Invited:	-
							Completed Reviews:	0	Outstanding Invitations:	0
							Un-assigned After Agreeing:	0	Agreed:	0
									Declined:	0
							Terminated After Agreeing:	0	Un-invited Before Agreeing:	0
							Last Review Agreed:	-		
							Last Review Completed:	-	Terminated:	0
							Last Review Declined:	-	Total Invitations:	0
							Avg Days Outstanding:	0		
							Manuscript Rating:	0		
							Avg Review Rating:	0.0		

Reviewer Discovery

Increase your Reviewer Pool!

Reviewer Discovery

Reviewer Discovery, a power-ful Editorial Manager (EM) v10.1 feature, integrates the ProQuest Pivot™ service with EM via an API. It allows editors to quickly generate a list of relevance ranked candidate reviewers.

em Editorial Manager®

Reviewer Search

○ Search My Publication   Search for Reviewers   from   All Reviewers   Go
● Reviewer Discovery from ⊙ pivot ProQuest Community of Scholars

Reviewer Selection Summary - Submission DEMO.2017.0007

Andy Author
Tea is Essential to Life!

Reviewer Search

○ Search My Publication   Search for Reviewers   from   All Reviewers   Go
● Reviewer Discovery from ⊙ pivot ProQuest Community of Scholars

- A journal's reviewer pool is often overburdened and journals can spend a lot of time searching outside of the reviewer pool.

- RD uses ProQuest, a well-curated database of biographic and bibliographic profiles on approximately 3.5 million scholars and researchers (including e-mail addresses).

- RD allows these profiles to be matched against the title and abstract of a submission, based on how closely the topics reflected in the title/ abstract correlate with the PQ scholar profiles.

- Increases and refreshes the journal's reviewer pool and also helps to find reviewers for more niche submissions.

Reviewer Discovery

- Using an API, candidate reviewers are automatically identified based on submitted manuscript "fingerprint" (title, authors, abstract, etc.).
- Workflow integration makes it easy to evaluate, select and invite candidate reviewers without copy and pasting.

Reviewer Discovery

Inv. Asn. Alt. Prop.	Information from Reviewer Discovery:		
☐ ☐ ☐ ☐	Department of Health Sector Management and Policy Miami Business School University of Miami ████@miami.edu	No	**1 Reviewer Discovery Keyword(s) Found** Health Services Administration	View Researcher Profile and Publications
Inv. Asn. Alt. Prop. ☐ ☐ ☐ ☐	Information from Reviewer Discovery: ████████ School of Public Health and Health Systems Faculty of Applied Health Sciences University of Waterloo ████@uwaterloo.ca ████@healthy.uwaterloo.ca	No	**3 Reviewer Discovery Keyword(s) Found** Gerontology Public Health Allied Health	View Researcher Profile and Publications
Inv. Asn. Alt. Prop. ☐ ☐ ☐ ☐	Information from Reviewer Discovery: Department of Behavioral and Social Sciences School of Public Health Division of Life Sciences Brown University ████@brown.edu ████edu	No	**1 Reviewer Discovery Keyword(s) Found** Social Sciences	View Researcher Profile and Publications
Inv. Asn. Alt. Prop. ☐ ☐ ☐ ☐	Information from Reviewer Discovery: ████████ Survey Research Center Institute for Social Research University of Michigan ████@umich.edu ████@isr.umich.edu ████t@isr.umich.edu	No	(Keywords unavailable)	View Researcher Profile and Publications

- Clicking on "View Researcher Profile and Publications" allows you to drill down and see more information about each possible match.

Reviewer Discovery

- Drill down data available:
- ➤ Past Affiliations
- ➤ Qualifications: degree, discipline, institution
- ➤ Honors and Awards
- ➤ Memberships
- ➤ Languages
- ➤ Personal Keywords
- ➤ Expertise
- ➤ Grants
- ➤ Patents
- ➤ Most Recent Publications

Reviewer Discovery from ProQuest Community of Scholars

Close

Profile

Past Affiliations:	
Qualifications:	PhD, Economics, Boston College MA, Economics, Boston College BA, Economics, James Madison University
Honors and Awards:	
Memberships:	
Languages:	
Personal Keywords:	Health Services Administration
Expertise:	Health economics; health policy; alternative health care delivery systems; and human resource economics My interests and experience includes health economics, health policy, program evaluation, substance abuse research, alternative health care delivery systems, pharmaco-economics, human resource economics, and the economics of crime.

Patents & Grants

Patents:	
Grants:	

Summarized Publications

Total Articles	
Total Book Chapters	
Total Conference Papers	
Total Other	

Most Recent Publications

Summarized Publications

Total Articles	70
Total Book Chapters	0
Total Conference Papers	0
Total Other	0

Most Recent Publications

Publication Date	Type	Name	Volume	Issue	External Link	Title	Abstract
September 24, 2018	ARTICLE	Social science & medicine (1982)	216		CrossRef PubMed	Watch for motorcycles! The effects of texting and handheld bans on motorcyclist fatalities.	Motorcyclists account for a much higher proportion of traffic fatalities relative to the share of motorcycles among all motor vehicles and vehicle miles driven in the U.S. In this paper, we posit (more...)
August 2017	ARTICLE	Journal of substance abuse treatment	79		CrossRef PubMed	Benefit-cost analysis of SBIRT interventions for substance using patients in emergency departments.	Screening, brief intervention, and referral to treatment (SBIRT) has been widely implemented as a method to address substance use disorders in general medical settings, and some evidence suggests (more...)
August 24, 2016	ARTICLE	Social science & medicine (1982)	167		CrossRef PubMed	To your health!: Re-examining the health benefits of moderate alcohol use.	Although excessive alcohol use and alcohol misuse contribute to a broad range of health problems, recent research indicates that moderate alcohol consumption may in fact be beneficial. The present (more...)
Apr 2014	ARTICLE	The Journal of Behavioral Health Services & Research	41	2	CrossRef PubMed	Cannabis Use, Employment, and Income: Fixed-Effects Analysis of Panel Data	Uncertainty exists regarding the direction and magnitude of the association between cannabis use and labor market outcomes. Using panel data from waves 1

Reviewer Discovery

Benefits:

- Reviewer Discovery identifies new reviewers and expands your Reviewer Pool!

- Selected new candidates are proxy-registered in the background at selection, then invited (or assigned, or selected as alternates/proposed) using existing reviewer invitation/assignment process.

- Selected new candidates are registered in your system for future use when identifying reviewers.

Inv.	Asn.	Alt.	Prop.	**Information from Reviewer Discovery:**
☑	☐	☐	☐	██████████
This Reviewer candidate will be proxy-registered when you click Proceed or perform another search.				School of Public Health and Health Systems Faculty of Applied Health Sciences University of Waterloo ███████@uwaterloo.ca ██████████@healthy.uwaterloo.ca

Assign Reviewer Role

All Reviewer candidates must be assigned a Reviewer Role before being invited to review. Please assign a Reviewer Role to the people who do not yet have roles. You can also check 'Do not use this Person' if you decide not to invite them.

Name	Selected As	Reviewer Role	Do not use this Person
███████████████	Invited	Reviewer ▾	☐
█████████████	Invited	Reviewer ▾	☐

Cancel   Assign Reviewer Roles

Reviewer Discovery – Configuration

- Enabled by Aries Account Coordinator.

- Once this feature is enabled, the new "*Reviewer Discovery from ProQuest Community of Scholars*" search option is available for Editors with permission to Invite/Assign/Propose/select Alternate Reviewers (in Role Manager).

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

External Reviewer Database

Version 15.1

External Reviewer Database

Reviewer Selection Summary - Submission DEMO-D-16-00015

Elizabeth Mary Webber, MD
Very Important Research Article

- An additional method of finding qualified Reviewers by allowing Editors to send a request from EM to an External Reviewer Database.

- The candidates identified in the external system are imported into EM and presented as Proposed Reviewers on the *Reviewer Selection Summary* page, making the external candidates available to the Editor for selection in EM.

- There is a new permission in Role Manager "Request External Reviewers".

External Reviewer Database

External Reviewer Database

External Reviewer Request Form - Submission DEMO-D-16-00015

External Reviewer Request History

Date Request Sent	Current Status	Request Details	Operator
11/13/2017	Pending	3 Regular Reviewers - I want 3 Reviewers with expertise in cardiomyopathy and at least one needs to be a cardiac surgeon. 2 Stat Reviewers	Stacey J Lavelle, MD
10/20/2017	Complete	1 Tech Reviewer	Ed P Garcia, M.D.

Request External Reviewers

Please select the desired number of Reviewers for each Reviewer Role and (optionally) enter any notes related to your request.

[0 ▼] Regular Reviewer

[0 ▼] Tech Reviewer

[0 ▼] Stats Reviewer

[Cancel] [Submit]

Request External Reviewers Confirmation

Your request for external reviewers has been submitted. When the results have been returned a notification will be sent and the Proposed Reviewers will be displayed on the Reviewer Selection Summary page.

Return to Reviewer Selection Summary

- An additional method of finding qualified Reviewers by allowing Editors to send a request from EM to an External Reviewer Database ("ERD").

- The candidates identified in the external system are imported into EM and presented as Proposed Reviewers on the Reviewer Selection Summary page, making the external candidates available to the Editor for selection in EM.

Reviewer Recommendation Forms

Reviewer Recommendation and Comments for Manuscript Number WEBDEM-D-18-00009

Standing by Your Man: it's Overrated

Original Submission
Remy Reviewer   (Reviewer 3)

Recommendation: | Major Revision ▼ | Overall Manuscript Rating (1-100): | 54 |

[Cancel] [Save & Submit Later] [Upload Reviewer Attachments] [Proof & Print] [Proceed]

View Reviewer Comments

Manuscript Rating

Please rate your answers 1-5 where 1 is excellent and 5 is poor.

*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

- Reviewer Recommendation Forms allow you to collect information from Reviewers about the paper.
- Rating Questions are available on a scale of 1-3, 1-5, 1-10.
- Add custom questions with various response types (dates, digit, note, nested).
- Comments to Author are automatically pulled through to your decision letter. Don't worry! You can edit these to improve sense or remove anything defamatory.

Review Questions and Responses Grid

Review Questions and Responses Grid on Decision Page

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**

☐   This is a good paper.

☐   The reviewers have reviewed your work and generally their reviews are positive. We are pleased to tell you we will accept your submission once the changes detailed by the reviewers and editors have been made.

☐   The reviewers have evaluated your paper and have recommended some changes.

☐   I am sorry to tell you that your submission has not been successful.

☐   Your submission to our journal has not been successful. The reason for this is....

⊟ Review Questions and Responses

Karen Little Reviewer 1	Becky Reviewer Reviewer 2	Numair Salmalin Reviewer 3
Are you willing to review the revision of this manuscript?		
Yes	Yes	Yes
Will this paper be of interest to our readers?		
Yes	Yes	Yes
Please rate the research:		
Very Good	Very Good	Excellent
Would you recommend that we publish this manuscript?		
Yes	Yes	Yes

Cancel   Save & Submit Later   Proof & Print   Proceed

Review Questions and Responses Grid – Configuration

- Policy Manager > Reviewer and Editor Form Policies > Editor Decision Policies > Create Editor Forms
- Edit Editor Form.
- Check "*Display Custom Review Questions and Responses Grid*".

View Reviews and Comments

- When all Reviews are completed, the Editor is notified via a letter.
- They can then use the View Reviews and Comments action link to look at the responses.
- All recommendations, comments, ratings, and attachments from Reviewers are collected together in one place.

Discussion Forum

Discussion Forum

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Duplicate Submission Check (61%) Details ⚑ Initiate Discussion History Submit Early Decision Technical Check View QC Results File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Send E-mail Linked Submissions Search Publons Reviewer Finder	DEMOAW.2018.0030	Original Study	Clinincal Section	Diabetes Mellitus - EEMUG Demo Duplicate	Doctor Worm D ⚑	Dec 12, 2018	Dec 12, 2018	Manuscript Submitted

- Provides a means for Editors to solicit informal opinions, feedback or an editorial consultation regarding a submission from other Editors.

- Supports collaborative Editorial workflows.

- Discussions can be initiated at any point in the workflow and can run concurrently to Peer Review.

- Multiple discussion topics can be created for a submission.

Discussion Forum

- If more than one Topic Template has been created, the editor/admin can choose from the drop down template list or (if configured) users can type in a Topic and Initial Comment.

Discussion Forum

Initiate Discussion for Manuscript Number: DEMOAW.2018.0021
Doctor Worm
"Drinking Tea Makes You Happy and is Good for your Health!"

Topic	This submission - what do you think?
Initial Comments	I like this submission and think we should publish it, what do you think?

☐ Editor Candidates

Search Again

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
☑	Associate Editor	Alison Associate-Editor ⚑	0	☑	☑	☐	0		Yes
☑	Editor (This editor is already assigned to the current submission)	Eddie Editor ⚑	6	☑	☑	☐	0		Yes
☐	Managing Editor	Alison Admin ⚑	0	☐	☐	☐	0		Yes
✓	Managing Editor	Anna Anna ⚑	0				0		Yes
☐	Managing Editor (Possible author of the submission)	Amie Author ⚑	0	☐	☐	☐	0		Yes
☑	Managing Editor	mary mary ⚑	0	☑	☑	☐	0		Yes

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

Search Again

Cancel   Start Discussion without Sending Letters   Proceed To Customize Letters

Discussion Forum

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
Alison Associate-Editor (Associate Editor)	Discussion Forum Invitation ▾	Customize	☐
Eddie Editor (Editor)	Discussion Forum Invitation ▾	Customize	☐
mary mary (Managing Editor)	Discussion Forum Invitation ▾	Customize	☐

Cancel   Confirm Selections and Send Letters

Discussion Participants Confirmation

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

Alison Associate-Editor (Associate Editor)
Eddie Editor (Editor)
mary mary (Managing Editor)

Close   Set Flag

Discussion Forum

Discussion for Manuscript Number: DEMOAW.2018.0021
Doctor Worm
"Drinking Tea Makes You Happy and is Good for your Health!"

Cancel   Save and Close   Conclude Discussion

Participant Summary   View Submission   View Reviews and Comments   File Inventory   Add/Edit Submission Flags   Details ⚐ 😊

Topic:

This submission - what do you think?

Comments:

View/Print All

Participant ▲▼	Comments	Date ▲▼
mary mary	● I agree!	Dec 05, 2018
Eddie Editor	● I like this submission and think it would be good in our Special Issue	Dec 05, 2018
Anna Anna	I like this submission and think we should publish it, what do you think?	Dec 05, 2018

Post

Add Participants

⊟ **Editor Participants**

Editor Participant ▲▼	Role ▲▼	# Posts	Latest Post	Participant Status ▲▼	View Reviews and Comments	Download Files	View Draft Decision Letter	
Anna Anna ⚐	Managing Editor	1	Dec 05, 2018	Active	✓	✓	✓	Send E-mail
Alison Associate-Editor ⚐	Associate Editor	0		Active	☑	☑	☐	Send E-mail
Eddie Editor ⚐	Editor	1	Dec 05, 2018	Active	☑	☑	☐	Send E-mail
mary mary ⚐	Managing Editor	1	Dec 05, 2018	Active	☑	☑	☐	Send E-mail

Discussion Forum

Search Submissions | Search People

Editor 'To-Do' List

My Pending Assignments (7)
    Transferred Submissions (2)
    New Submissions (0)
    Revised Submissions (0)
    New Submissions Requiring Assignment (0)
    Revised Submissions Requiring Assignment (0)
    Submissions Needing Approval by Editor (2)
    New Invitations (0)
    New Assignments (0)
    Submissions with Required Reviews Complete (0)
    Submissions Requiring Additional Reviewers (0)
    Submissions with One or More Late Reviews (0)
    Submissions with Active Discussions (3) **1**
Reviews in Progress (0)
    Reviewers Invited - No Response (0)
    Submissions Under Review (0)

- An indicator showing the number of unread posts may be configured to display.
- On the Editor's Main Menu, next to the Submissions with Active Discussions folder, the indicator shows the number of unread posts for all discussions.
- Within the Submissions with Active Discussions folder, an indicator shows the number of unread posts for each discussion topic.

Discussion Forum – Configuration

PolicyManager Main Menu

Expand All Collapse All

⊞ **Registration and Login Policies**
⊞ **Status Policies**
⊞ **Submission Policies**
⊞ **Questionnaire Policies**
⊞ **Additional Data Policies**
⊞ **Editor Assignment Policies**
⊞ **Suggest Editor Policies**
⊞ **Reviewer and Editor Form Policies**
⊞ **E-mail and Letter Policies**
⊞ **General Policies**
⊟ **Discussion Forums**
  Configure Discussion Forum Settings
  Configure Discussion Topic Templates
  Configure Automatic Discussion Initiation

⊞ **Linked Submissions Policies**
⊞ **Conference Submission Policies**
⊞ **Transmittal Policies**
⊞ 🔴**ProduXion Manager**

- In System Administrator Functions > Policy Manager > Discussion Forums

Discussion Forum – Configuration

- In System Administrator Functions > Policy Manager > Discussion Forums > Configure Discussion Forum Settings
- Custom instructions can be added.
- Deep Link Expirations can be set.
- Discussion Indicators can be enabled.

Discussion Forum – Configuration

- In System Administrator Functions > Policy Manager > Discussion Forums > Configure Discussion Topic Templates

- To force the editor/admin to choose a topic template from the list on "Initiate Discussion" (rather than typing in a Topic and Initial comment) check the "*Require*" box below.

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	
1	Editor Consultation	Master Topic Template		Edit (Master)
2	Editor Consultation	Pre Decision and Draft Decision Letter Discussion	Remove	Edit
3	Editor Consultation	Special Issue Discussion Topic Template	Remove	Edit

[Update Order]

[Add]

Configure Discussion Forum Settings

Configure Automatic Discussion Initiation

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	Editor Consultation ▼

Open Special Character Palette

Discussion Topic Template Name

'Initiate Discussion' Page Custom Instructions

Topic

☐ Allow user to modify Topic name when initiating a discussion

Initial Comments

☐ Allow user to modify Initial Comments when initiating a discussion

Default Editor Participant Permissions
☐ View Reviews and Comments
☐ Download Files (source and companion)
☐ View Draft Decision Letter

Editor Access to 'Details' Link
☐ 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.'
Editorial Details Layout Configured for the Editor's Role ▼

Editor Discussion Letters
Select the Letter to send asking Editors to participate:
None ▼

Select the notification letter to send to Editors when comments are posted:
None ▼

○ Notify discussion initiator only
○ Notify all active Editor participants

Discussion Forum – Configuration

- In System Administrator Functions > Role Manager > Editor Role
- Edit the role(s).
- The permissions are in the **Discussion Forums** Section.
- Permission to "*View All Discussions*".
- "*Initiate and Manage Discussions*" with sub-setting:
  o My Discussions Only or
  o All Discussions

☑ Edit Other Author E-mail Address

☑ Bypass 'Restricted File Types' Requirements

☐ Edit Global MS ID

☐ Edit Early Proof URL

⊟ **Discussion Forums**

☑ View All Discussions

☑ Initiate and Manage Discussions

  ○ My Discussions Only

  ⦿ All Discussions

⊟ **Transmittal Form**

☑ View Transmittal Form

☑ Edit Transmittal Form Fields

Discussion Forum – Benefits

Benefits:

- Saves time as can run concurrently to peer review.

- If the issue is a showstopper the Discussion can take place before Editor assignment and peer review.

- Keeps a record of the Editors' discussions about the submissions.

- Can be used for some papers (for example submissions where there is an issue or special issue papers) or all submissions.

Use Cases:

- Collaborative Editor workflows – editors can all discuss the submission and the assigned Editor can then set the decision and the author can be notified.

- Editors and Admins can discuss any or all submissions and/or key issues about certain submissions.

- Allows Editors to pose questions and post comments without delaying the editorial (or production) process in any way.

- However, if a publication wants to effectively freeze the editorial process on a submission while a discussion takes place, this can be done by not assigning Editors or inviting Reviewers until the discussion topic is closed.

- Can give guest editors access to the submission PDF, Reviews and Draft Decision Letter and to give their feedback, while the Editor in Chief or Main Editor invites reviewers and makes the decision.

Making a Decision

To accept or not to accept…?

Decision Permissions – who does what?

- Decisions, the decision making process and decision permissions are highly configurable.

- This allows for different decision workflows.

- Flexible.

- Different editor roles can have different permissions.

- It is also possible to allow for different permissions based on the decision term – for example if a journal has AEs and EiCs then it could be configured that for certain decisions an AE can make the decision, draft and send the letter but for others only a recommendation is allowed and the Senior Editor makes the decision.

- This also allows for journals where the Editor makes the decision and the ME drafts and sends the notification letter.

- This does not prevent a simple one editor does all workflow!

Making a Decision

- An assigned Editor with the correct permissions can make a decision at any time.
- Editors with permission can terminate outstanding Editor or Reviewer assignments to proceed with the decision.
- There are two parts to making a decision in EM: the decision, and notifying the author.
- The ability to notify the author of a decision is an Editor permission.

Editor Decision Page

Editor Decision and Comments for Manuscript Number DEMOAW.2018.0021

Drinking Tea Makes You Happy and is Good for your Health!

Original Submission
Eddie Editor (Editor)

Decision: No Decision ▼   Overall Editor Manuscript Rating (1-100): [   ]

[Cancel] [Save & Submit Later] [Proof & Print] [Proceed]

Details ⚐ ☺   History   Attachments (0)   Assign Editor   Invite Reviewers   View Manuscript Rating Card   View Review Question Responses   Send E-mail

Original Submission	
Karen Little ⚐ (Reviewer 1)	Accept
Becky Reviewer ⚐ (Reviewer 2)	Minor Revision
Numair Salmalin ⚐ (Reviewer 3)	Accept
Eddie Editor ⚐ (Editor)	Assigned - No Decision
Author Decision Letter	
Doctor Worm ⚐ (Author)	

If the decision is Revise, the author has [30] days to revise this submission.

[Editor Instructions]

Confidential Comments to Editor

Insert Special Character   [Open in New Window]

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

Editor Decision Page – Reviewer Comments Merged In

Confidential Comments to Editor

Insert Special Character | Open in New Window

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

Reviewer, Karen Little: Good submission, I recommend acceptance

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

This is a good submission and there is original research

Comments to Author

Insert Special Character | Open in New Window

Reviewer #1: This is a very good paper.

Please expand on point 4 on page 5 line 27...

There is a typo on page 14

Reviewer #2: I like this paper and I think you make a good point.

Recommend publish

Reviewer #3: This is a very good submission, and I recommend publication especially because Tea is so important.

Editor Decision Page – Reviewer Comments Separate

Confidential Comments to Editor

Insert Special Character | Open in New Window

Reviewer, Reggie Reviewer: Reviewer 1 comments to Editor - this is a good submission and although it needs a few changes it would be a good publication

Reviewer, Rosie Reviewer: Reviewer 2 comment to editor - I recommend publishing this paper

Reviewer, Rapunzel Reviewer: Reviewer 3 comment to editor - I have attached my review. I think this is a good submission and the ideas are original. I would like to see the authors expand on their conclusions more
Then I would recommend publication

Comments to Author

Insert Special Character | Open in New Window

Editor comments to author

Individual Reviewer Comments to Author (Editor's Copy)

*Select comments for inclusion in the Decision Letter sent to the Author. * indicates a comment modified from the original.*

Insert Special Character | Open in New Window

☑ Reggie Reviewer
Reviewer 1

Reviewer 1 Comments to Author

I like this paper and recommend acceptance after a few changes....

Insert Special Character | Open in New Window

☑ Rosie Reviewer
Reviewer 2

Reviewer 2 Comments to Author

Insert Special Character | Open in New Window

☑ Rapunzel Reviewer
Reviewer 3

Reviewer 3 - please see attached comments

original ideas, well presented

Please expand on conclusions

Editor Decision Page – Reviewer Comments – Merged or Separate?

- Reviewer comments can be merged in or separated out.
- For both options the reviewers' comments to Editor are in the "Confidential comments to Editor" box.
- Set in System Administrator Functions > Policy Manager > Reviewer and Editor Form Policies > Reviewer Recommendation Policies > Create/Edit Review Forms > Edit Form – select "Keep separate from Editor Comments in Decision Chain" under "Display Comments to Author text box".
- If using separate comments the merge field to insert these separate comments into the decision letter is %INDIVIDUAL_REVIEWER_COMMENTS_TO_AUTHOR%

Editor Decision Page

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**

☐ This is a good paper.

☐ The reviewers have reviewed your work and generally their reviews are positive. We are pleased to tell you we will accept your submission once the changes detailed by the reviewers and editors have been made.

☐ The reviewers have evaluated your paper and have recommended some changes.

☐ I am sorry to tell you that your submission has not been successful.

☐ Your submission to our journal has not been successful. The reason for this is....

⊟ Review Questions and Responses

Karen Little Reviewer 1	Becky Reviewer Reviewer 2	Numair Salmalin Reviewer 3
Are you willing to review the revision of this manuscript?		
Yes	Yes	Yes
Will this paper be of interest to our readers?		
Yes	Yes	Yes
Please rate the research:		
Very Good	Very Good	Excellent
Would you recommend that we publish this manuscript?		
Yes	Yes	Yes

Cancel   Save & Submit Later   Proof & Print   Proceed

Editor Questionnaires

Version 16.0

Editor Questionnaires

- Extends the Custom Review Question functionality to the Editor Form.

- Allows publications to collect specific information from their Editors as part of the peer review process during all revisions of a submission.

- Similar to current functionality, a Custom Review Question can be added to multiple Editor and/or Review Forms.

- Allows you to ask your Editors the same questions as your reviewers, different questions or both.

- Available for Decision Letter merging (using 2 new merge fields).

Drafting the Decision Letter

Good News or Bad News?

Drafting the Decision Letter – Drafting the Letter Only

Notify Author

Manuscript Number:
DEMOAW.2018.0028

Title: EEMUG Demo Submission

To finalize your decision and pass this draft notification letter to the next Editor, use the 'Submit Decision with Draft Letter' button.

Cancel	Submit Decision with Draft Letter
Preview Letter	Save	Save and Close

Date Revision Due:	01/05/2019 (mm/dd/yyyy)
Editor Decision:	Minor Revision
Modify Decision:	Minor Revision
From:	"Anna Demo 15.0 Site"<awalton@ariessys.com>
To:	Harry Potter
Letter Purpose:	Editor Decision - Revise
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

☐ ☐ Eddie Editor (Editor)

☐ ☐ Alison Associate-Editor (Associate Editor)

cc:

bcc:

Letter Body: Insert Special Character | Insert Custom Merge Field Open in New Window

Ref.: Ms. No. DEMOAW.2018.0028
EEMUG Demo Submission
DEMO AW Site

Dear %TITLE% %LAST_NAME%,

Reviewers have now commented on your paper. You will see that they are advising that you revise your

- Depending on permissions the Decision Letter Draft can be done by a lower editor and passed back up the chain or drafted and Sent by the EiC or Managing Editor.

- If the lower level Editor can only draft (but not send) the letter they will "*Submit Decision with Draft Letter*" and then their assignment is finished.

- When drafting the Decision Letter the editor can Preview the letter to see how it will look and also has the option to Save or Save and Close.

- If there is a middle level editor (and they have permission) they can review the draft from the lower Editor and add their comments in.

Drafting the Decision Letter – Drafted Letter passes up the Editor Chain

Notify Author

Manuscript Number:
DEMOAW.2018.0028

Title: EEMUG Demo Submission

This draft was last saved by another editor.

If you agree with the previous editor's decision, you may continue with this draft notification.

To reject this decision and send the assignment back to the previous Editor, use the Return to (Editor) link.

To override this decision by submitting your own decision and comments, use the 'Submit New Decision' button.

	Cancel Submit Decision without Notifying Author Submit New Decision
	Preview Letter Save Save and Close Send Now

Date Revision Due:	01/05/2019 ▦ (mm/dd/yyyy)
Editor Decision:	Minor Revision
Rescind Decision:	Return to Associate Editor
From:	"Anna Demo 15.0 Site"<awalton@ariessys.com>
To:	Harry Potter
Letter Purpose:	Editor Decision - Revise
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
	☐	☐	Eddie Editor (Editor)
	☐	☐	Alison Associate-Editor (Associate Editor)
	cc:		
	bcc:		

Letter Body: Insert Special Character | Insert Custom Merge Field   Open in New Window

Ref.: Ms. No. DEMOAW.2018.0028
EEMUG Demo Submission
DEMO AW Site

- If the Decision Letter was drafted by another editor a warning will show: "*This draft was last saved by another editor*".
- The next level of editor can review the letter and edit it as desired.
- If the higher editor does not agree with the lower editor's decision they can change it (with permission).
- The editor who has permission to "*Notify Author*" will see the **Send Now** link to send the decision letter and set the decision.

Drafting the Decision Letter – Draft and Send Letter

Notify Author

Manuscript Number:
DEMOAW.2018.0021

Title: Drinking Tea Makes You Happy and is Good for your Health!

To finalize your decision and notify the author, use the 'Send Now' button.

If you wish to submit your decision to the next editor for review before the author is notified, use the 'Submit Decision without Notifying Author' button.

Cancel | Submit Decision without Notifying Author

Preview Letter | Save | Save and Close | Send Now

Date Revision Due:	01/09/2019 📅 (mm/dd/yyyy)
Editor Decision:	Minor Revision
Modify Decision:	Minor Revision ▾
From:	"Anna Demo 15.0 Site"<awalton@ariessys.com>
To:	Doctor Worm
Letter Purpose:	Editor Decision - Revise
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

☐ ☐ Eddie Editor (Editor)

cc: [   ]

bcc: [   ]

Letter Body: Insert Special Character | Insert Custom Merge Field | Open in New Window

Ref.: Ms. No. DEMOAW.2018.0021
Drinking Tea Makes You Happy and is Good for your Health!
DEMO AW Site

Dear %TITLE% %LAST_NAME%,

Reviewers have now commented on your paper. You will see that they are advising that you revise your

- For workflows where one person drafts and sends the decision letter they will be able to view, edit and send the decision letter.

- They will also be able to Preview, Save and Save and Close the decision letter draft.

- Until the Decision Letter is sent to the author the Editorial Status will show as *Decision in Process*.

Notify Author

Is it good news?

Notify Author

View Submission Details ⚐ History Unassign Editor File Inventory Edit Submission Solicit Commentary Assign Editor **Notify Author** Set Final Disposition Initiate Production View Reviews and Comments Rescind Decision Similar Articles in MEDLINE Send E-mail Linked Submissions	ANNATEST131-D-17-00003	Original Study	Ice Tea is Only a Pretend Tea - Discuss!	Andy Middle Author, PhD ⚐	Feb 07, 2017	Dec 10, 2018	Decision in Process	Eddie Editor	Reject	**Notify Author**

- Once all editors in the chain have made their decision and the decision letter has been drafted – to set the decision the author must be notified.
- Notify Author can be done by an Editor or Admin with permission.

Notify Author

- The letter text can be customized if desired.
- The Comments to Author can be pulled in using a merge field.
- If the Editor wants to add additional information into the decision letter they can do so.
- Comments from reviewers can also be amended if needed.
- The draft letter can be saved and previewed.

Notify Author - Configuration

- For Journals where the Managing Editor or Admin Notifies the author after the editor decision(s) the role will need the "*Notify Author of Editor's Decision when Editor Chain is Complete*" permission checked.

- There is also a sub-permission "*And Modify Editor's Decision*" which can also be enabled.

Managing
People Records
That's not my name!

User Records

- Use **Search People** to locate user records.
- Clicking the users name opens the user's record.

User Records

- Inactivate or Anonymize the user
- Assign user roles
- View Activity Details
- Send Login Details

User Records

Personal Information

Field	Value	Note
Title *	Dr.	(Mr., Mrs., Dr., etc.)
Given/First Name *	Andy	
Middle Name		
Family/Last Name *	Author	
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 *	Andy@trash.com	

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
What is ORCID?

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   (None Selected)
[Select Personal Classifications]

Personal Keywords   (None Defined)
[Edit Personal Keywords]

Institution Related Information

Field	Value	Note
Position		
Institution		(max 300 characters)
Department		(max 450 characters)
Street Address		
City		
State or Province		
Zip or Postal Code		
Country or Region *	UNITED STATES	
Address is for *	Work◉ Home○ Other○	

[Alternate Contact Information]

[Unavailable Dates]

People Notes

[Cancel] [Submit]

- Update personal and business related information, classifications keywords, and people notes.

- People notes display for Editors with Reviewer search results.

User Records
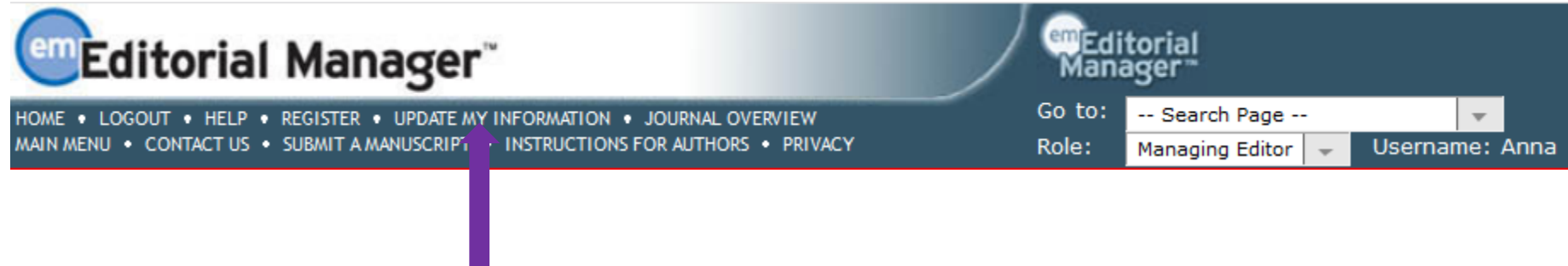
- Once logged into EM a user can update their own record by clicking on the "Update My Information" link in the main navigation bar.

- Individual users do not see the people notes field.

Activity Details

Reviewer Recommendation Summary

Accept:	0
Accept with Provision:	0
Major Revision:	0
Minor Revision:	0
Reject:	0

Current Author Invitation Statistics

Date Last Agreed	Invited Submissions in Progress	Outstanding Invitations
Feb 18, 2016	0	1

Historical Author Invitation Statistics

Total Author Invitations	Agreed to Submit	Declined to Submit	Un-invited Before Agreeing to Submit
2	1	0	0

Historical Author Invitation Averages

Days to Respond to Author Invitation	Days to Submit Invited Submission	Days Late	# of Author Reminders
0	0	0	0

Authored Submissions

MS Number	Title	Initial Date Submitted	Status	Status Date	Decision	Final Disposition	Action
WEBDEM-D-12-00011	INITIATE PRODUCTION MANUALLY - 7/18/12	May 25, 2012	Completed Accept	Jul 12, 2012	Accept	Accept	View Submission Details History

- Reviewer Recommendation Summary
- Current Author Invitation Statistics
- Historical Author Invitation Statistics
- Authored Submissions

User Records - Merge Users

- Select the users to be merged and click the Merge People Records button.
- Two users can be merged at a time.
- The ability to Merge Users is a permission in Role Manager.
- Although possible, undoing a merge is difficult. We recommend that users are carefully checked prior to merging and that the permission is not given to everyone.

User Records - Merge Users

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.

[Combine and Keep this Record]	[Combine and Keep this Record]
Abby Author (abby)	Abby Olivia Author (AbbyAuthor)
,	,
UNITED STATES	UNITED STATES
trash18@ariessc.com	trash18@ariessc.com
Roles: Author	**Roles:** Author, Reviewer
User has History? Yes	**User has History?** No
User has Current Assignments? Yes	**User has Current Assignments?** No
User has Shared their Searches? No	**User has Shared their Searches?** No
User has not viewed privacy policies	**User has not viewed privacy policies**
People Record Last Update Date: 06/08/2018	**People Record Last Update Date:** 06/14/2018
Personal Classifications:	**Personal Classifications:**
This user has no personal classifications	1 EMUG Presentations
	1.02 EM Bootcamp
[Combine and Keep this Record]	[Combine and Keep this Record]

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]

- Determine which record should be kept.
- Click on the "Combine and Keep this Record" button.
- The user is sent a letter notifying them of the merge.
- The merged record is inactivated.

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

Publication Main Page

Publication Main Page

Author Main Menu

Author Main Menu Instructions:
- Provide links to outside sources
- Use HTML to format text
- Provide links to download forms
- Special instructions

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	Insert Special Character For additional help with your submission, please click here for the Author Tutorial. <font color=red> 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:

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:

iD 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

- 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

- Configure custom submission instructions:

- Policy Manager - Submission Policies - Edit Manuscript Submission Instructions

- Different instructions available for initial submission and revision

Login Box

- 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

em

header

Insert Special Character

Please Enter the Following

Username:

Password:

Author Login   Reviewer Login   Editor Login   Publisher Login

Or Login via: iD   What is ORCID?

Send Login Details   Register Now   Login Help

FOOTER

Software Copyright © 2017 Aries Systems Corporation.   Privacy Policy

- 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

Author "I Accept" Checkbox

- "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

Author "I Accept" Checkbox

Area	Instructions
Instruction to display on the Author's Submissions Waiting for Author's Approval Page	Insert Special Character If no Actions appear for your submission, please wait a few minutes for your PDF to be built. The Actions appear automatically when your PDF is available. The 'Edit Submission' link allows you to fix or alter your submission. Please use View Default Instructions Revert to Default Instructions
Column Header	Insert Special Character Please read the \Plagiarism Agreement\ and indicate your acceptance by checking the box below.
Alert Text displayed if Author does not tick/select box before clicking Approve Submission	Insert Special Character You forgot to click the box!

To enable and configure instructions for the "I Accept" checkbox:

- Policy Manager > Submission Policies > Configure Author Accept checkbox.

Collecting Information

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

Author Questionnaires

- 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
Policy Manager > Questionnaire Policies > Edit Co-Author Questionnaire Instructions

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

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

Print

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.

Insert Special Character

Verify Contributing Authorship

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://www.editorialmanager.com/demoaw/l.asp?i=763&l=IPW2RBJ6

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.
If you have any questions please contact the Editorial Office.

Please confirm you give consent as a co-author for this paper to be submitted to our journal?

Answer Required:
○ Please select a response
○ Yes - I consent
○ No - I do not consent

Please select a response.

Do you like tea?

○ Please select a response
○ Yes
○ No

Are you a member of the TLS (Tea Lovers Society)?

Answer Required:
Please select a response ▼

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

STEP 1. Create questions in Policy Manager– Questionnaire Policies

⊟ **Questionnaire Policies**
Create Custom Questions ←
Create Questionnaires
Edit Co-Author Questionnaire Instructions

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

Author Questionnaires

⊟ **Questionnaire Policies**

Create Custom Questions

Create Questionnaires ⬅

Edit Co-Author Questionnaire Instructions

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: Author Questionnaire   (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
1	Do you have any potential conflict-of-interest with any of the members of the editorial board? Click here to view the current list.	☑	☐	Remove
2	Questions can have radio buttons for responses?	☐	☐	Remove
3	§ Questions can be yes / no / text questions	☑	☐	Remove
4	Questions can be answered in a text box.	☐	☐	Remove

Update Item Order

Add Custom Questions

Cancel   Save

- 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

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

Co-Author Parameters

Register/Verify Other Authors

Co-Authors verify on new submission

Authenticated ORCID iD Request: Hidden

☑ Display Author Questionnaire to Co-Authors

- Questions can be asked at initial submission or revision

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

Reviewer Forms

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 DEMOAW.2018.0025

Research Proposal - EEMUG 3

Original Submission
Reggie Reviewer   (Reviewer 1)

Recommendation: [Minor Revision ▼]   Overall Manuscript Rating (1-100): [   ]

[Cancel] [Save & Submit Later] [Upload Reviewer Attachments] [Proof & Print] [Proceed]

Reviewer Instructions

In order to use functions such as spell-check or bullets, then please type your review into Microsoft Word or a word equivalent program.

Recommendation: Select from a drop down list your recommendation for the paper.

Review Questions: Please answer any questions as accurately as you can either in the text box that is provided or by making a selection from a list of options.

Reviewer Blind Comments to Author: should have substantial specific comments on substance, organization and style and clear statements about the methodology, presentation of results, literature analysis or discussion. If you believe the manuscript should be rejected or requires substantial revision, it is important to include the relevant criticisms here. Please number your criticisms consecutively. Please pay particular attention to the use of figures and tables; feel free to suggest elimination or consolidation of such illustrations. Please do not comment on whether the manuscript should be published.

Reviewer Confidential Comments to Editor: should include any confidential remarks and any distinctions you may want to make between revisions you consider essential and those that are desirable but not necessarily requisite to publication. Please confine any statement about the acceptability of the manuscript to this section.

Some publications also provide the reviewer with the option to upload a file. If you have this option you will see a button labelled 'Upload Reviewer Attachments' at the top of the recommendation and comments page.

This manuscript is a privileged communication for your personal review. Please do not refer it to anyone else for review without prior approval by the editors. It is the property of the author and should not be reproduced or disseminated by you in any way.

In many cases, a manuscript submitted for publication as a full paper would gain impact from being re-written as a short communication. Any comments you should like to make regarding this point would also be greatly appreciated.

Thank you for your help. If you have any questions, please contact the editorial office at

Reviewer Forms

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 Comments to Author

Insert Special Character | Open in New Window

I like this paper.

A few revisions and then this is ready to publish:

Page 3, line 5 - more explanation needed, and citations
Page 15, line 24 - this paragraph needs clarifying
.....

Reviewer Confidential Comments to Editor

Insert Special Character | Open in New Window

I like this and recommend publication after revision

Editor Forms

Editor Forms

Editor Instructions

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

Responses to custom review questions are not available for this revision of the submission.

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**

☐   This is a good paper.

☐   The reviewers have reviewed your work and generally their reviews are positive. We are pleased to tell you we will accept your submission once the changes detailed by the reviewers and editors have been made.

☐   The reviewers have evaluated your paper and have recommended some changes.

☐   I am sorry to tell you that your submission has not been successful.

☐   Your submission to our journal has not been successful. The reason for this is....

Editor Review Questions

Insert Special Character

When you select the checkbox next to the question, the question and answer can be merged into the decision letter.

☑ *Will this paper be of interest to our readers?

[ ] ▾

☑ *Would you recommend that we publish this manuscript?

[ ] ▾

*Were the Reviews helpful in making the decision?

[ ] ▾

Cancel   Save & Submit Later   Proof & Print   Proceed

Reviewer and Editor Forms - Configuration

Reviewer and Editor Form Policies

Custom Review Questions for Editors and Reviewers

Create/Edit Custom Review Questions

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 Review Forms

Match Review Forms to Article Types and Reviewer Roles

Configure ORCID Review Deposit

Set Pending Assignments Deep Link Expiration

Set Reviewer Recommendation Deep Link Expiration

Editor Decision Policies

Edit Editor Decision Terms

Configure Editor Decision Phrases

Create/Edit Editor Forms

Match Editor Forms to Article Types and Editor Roles

Editor Manuscript Rating Question Configuration

Configure Options for Review Rating

Configure Automatic Withdrawal of Declined Revisions

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

[Cancel] [Submit]

Manuscript Rating Questions are configured in Policy Manager

Reviewer and Editor Forms - Configuration

- Manuscript Rating Questions are configured in Policy Manager
- Select the rating questions
- Assign them to a Review Form
- Review Forms are assigned by Reviewer Role and Article Type

Reviewer and Editor Forms - Configuration

Create Custom Review Questions for Reviewers and Editors

Listed below are the custom questions which may be displayed as part of a Review Form and/or an Editor Form. Questions can be used on Review Forms and Editor Forms, but a question can only be added once per form.

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

To add a new question, click the Add button.

Add

Question	Actions
Are you willing to review the revision of this manuscript?	Edit
Will this paper be of interest to our readers?	Edit
Please rate the research:	Edit
Would you recommend that we publish this manuscript?	Edit
1. Suitability. Please grade on a scale from 1 (low) to 5 (high). (a). Quality of Science. i Originality	Edit
ii Quality of data	Edit
iii Quality of statistical analysis	Edit
iv Quality of interpretation	Edit
Were the Reviews helpful in making the decision?	Edit

Add

Create/Edit Review Forms

Match Reviewer Forms to Article Types and Reviewer Roles

Create/Edit Editor Forms

Match Editor Forms to Article Types and Editor Roles

Return to PolicyManager

- Manuscript Review and Editor Questions are configured in Policy Manager
- Select the questions
- Assign them to a Review Form
- Review Forms are assigned by Reviewer Role and Article Type

Reviewer and Editor Forms - Configuration

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)

[Cancel] [Submit]

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 and on the Editor Form used at the Submit Editor's Decision and Comments step. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Review Question is no longer available for inclusion in new Review and Editor 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 or Editor to select from the list of responses. If **List** is chosen for the response type, additional options will appear which allow configuration of the list choices and type (dropdown, radio, checkboxes or scrolling selector). The **Yes/No** and **Yes/No/NA** response types will create a dropdown list with the options of Yes, No and Yes, No, Not Applicable, respectively. The **Yes/No/Text** response type will display a text box to gather additional information if the user chooses an option which requires further clarification.

[Cancel] [Submit]

Question: Insert Special Character

[   ]

Instructions for Reviewer or Editor Response: Insert Special Character

[   ]

☐ **Hide:** When you **Hide** a Custom Review Question, the question is deactivated (not available for use with new Review or Editor 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 (for Reviewers) or the %EDITOR_QUESTIONS_AND_RESPONSES% and %EDITOR_RESPONSES_AND_COMMENTS_TO_AUTHOR% merge fields (for Editors). Editors will be able to de-select individual responses before the Author is notified. The Reviewer 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.

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

Reviewer Forms - Configuration

Select the questions you want on your Review Form

Reviewer Forms - Configuration

Edit Review Form

Review Form Name: Default Review Form

☐ 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

Dear Reviewer:

Please find below some instructions that will help you perform your review of this paper.

You will have been sent the date that your review is due in the 'Reviewer instructions and due date' email please make sure that you submit your review by this date or notify the Journal office if you think you will need longer.

Reviewer Forms - Configuration

Indicate whether the question is required

Should the response be viewable by other reviewers or the author?

Current Custom Review Question List	Required for Submission	Visible to Reviewers	Visible to Author
☰ 🗑 Are you willing to review the revision of this manuscript?	☑	☐	☐
☰ 🗑 Will this paper be of interest to our readers?	☑	☐	☐
☰ 🗑 Please rate the research:	☐	☐	☐
☰ 🗑 Would you recommend that we publish this manuscript?	☑	☐	☐
➕ Add Custom Review Question			

☑ **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

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:

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
1	Reviewer Instructions
2	Custom Review Questions
3	Manuscript Rating Questions
4	Comments to Authors and Editors

Reviewer and Editor Forms - Configuration

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: Default Editor Form

Editor Instructions: Insert Special Character

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

Default Text for Confidential Comments to Editor: Insert Special Character

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

Reviewer and Editor Forms - Configuration

Current Custom Review Question List	Required for Submission
🗑 Will this paper be of interest to our readers?	☑
🗑 Would you recommend that we publish this manuscript?	☑
🗑 Were the Reviews helpful in making the decision?	☑

+ Add Custom Review Question

Current Editor Decision Phrase List	+ Add Editor Decision Phrase
🗑 This is a good paper.	
🗑 The reviewers have reviewed your work and generally their reviews are positive. We are pleased to tell you we will accept your submission once the changes detailed by the reviewers and editors have been made.	
🗑 The reviewers have evaluated your paper and have recommended some changes.	
🗑 I am sorry to tell you that your submission has not been successful.	
🗑 Your submission to our journal has not been successful. The reason for this is....	

+ Add Editor Decision Phrase

☑ Display Reviewer Questions and Responses Grid
☐ Display Editor Questions and Responses Grid

Order

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

Update Order

Cancel   Submit

Basic Reporting

Saved searches, creating custom reports, searching people and submissions

Basic Reporting

- Searching Submissions
➢ Displays a list of submissions
➢ Search results can be downloaded
➢ Search results can be saved to the Editor main menu (Quick Search)
➢ Search results can be shared with selected Editor roles

- Hard Wired Reports
- Creating Custom Reports

Search Submissions

Where is it?

Search Submissions

- Editors with permission can Search Submission.
- You can choose whether editors can search for all submissions, or only those assigned to them.
- Search from "Go To" menu or Search Submissions link.

Search Submissions

- You can search on many different criteria.

Search Submissions

Hover over the flag icon to display a description of the flag

Save Search

Download Search Results

Search Again

Learn More

Search Submissions

Quick Search

- Save a search to the main menu
- Clicking the quick search link displays the current result set

Search Submissions

Sharing Saved Searches

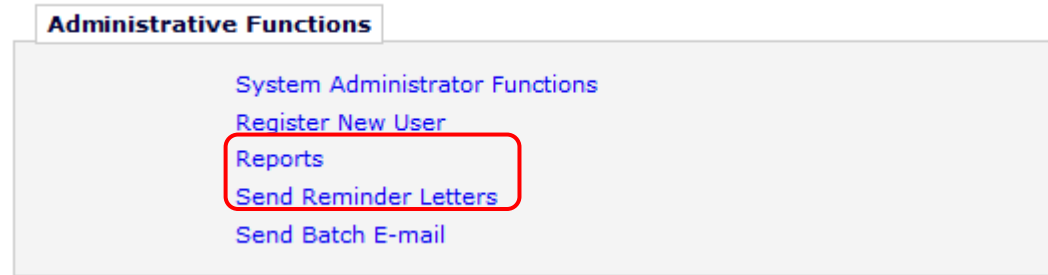- Editors with permission can share their search with selected Editor roles.

Hard Wired Reports

Tell me how many….

Hard Wired Reports

- Editors with permission can access reports from the Administrative Functions section of their main menu.

- The **Reports** link displays all hard wired reports, including reminder reports.

- The **Send Reminder Letters** link displays only reminder reports.

Hard Wired Reports

Reports

Report Tools
Enterprise Analytics Reporting
Cross-Publication Enterprise Analytics Reporting
General Data Export
Custom Report
Search/Manage Conference Submissions

Status Reports
Accepted Manuscripts Without a Publication Date
Current Status Report
Publishing Pipeline Report
Published Table of Contents Report
Editor's To-Do List Report
Current Role Designations Report

Author Reminder Reports
Co-Author Reminder Report
Author Revision Status Report
Author Revision Reminder Report
Automated Author Revision Reminder Report
Automated Author Transfer Reminder Report

Invited Author Reports
Proposal Pipeline Report
Authors Invited - No Response
Author Invitation Status Report

Editor Reports
Assignment Status Report
New Assignments Report
Required Reviews Complete Report

Reviewer Reports
Reviewer Invited - No Response Report
Reviewer Reminder Report
Automated Reviewer Reminder 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

ProduXion Manager Reports
Submission Tasks Reminder Report
Schedule Group Tasks Reminder Report
Editor/Publisher Assignment Totals by Task Type Report

Main Menu

Hard Wired Reports

Editor Assignment Policies

- Set Editor Assignment Options
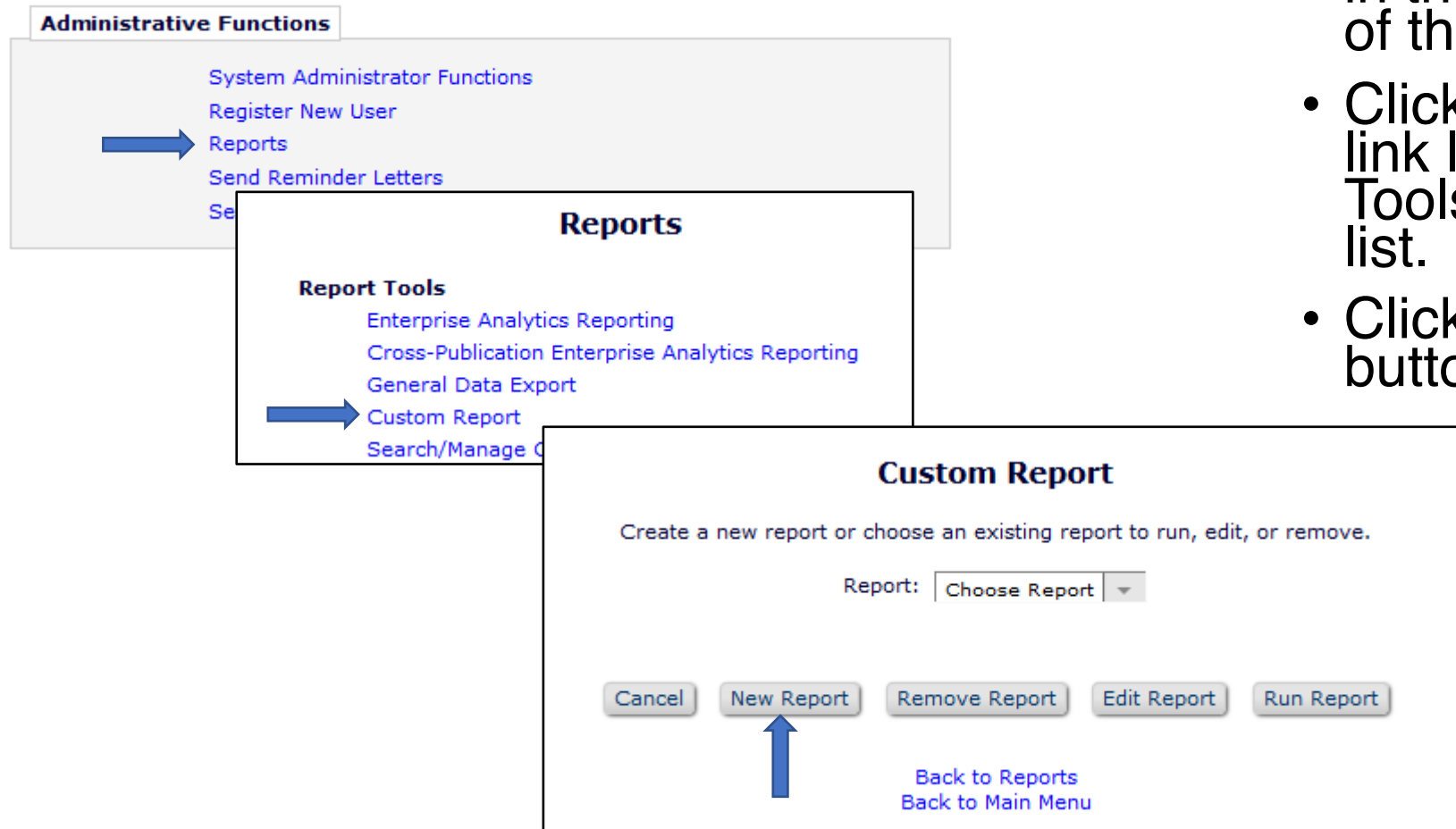- Define Editor Assignment Chain Templates
- Set Editor Rotation Participants
- Edit Instructions on Modify Editor Chain Page
- Configure Automated Summary Reminders

- **Automated Editor Summary Reminders** are not configured in the Reporting section. They are configured in Policy Manager – Editor Assignment Policies

Creating Custom Reports

Administrative Functions

System Administrator Functions
Register New User
→ Reports
Send Reminder Letters
Se

Reports

Report Tools

Enterprise Analytics Reporting
Cross-Publication Enterprise Analytics Reporting
General Data Export
→ Custom Report
Search/Manage

Custom Report

Create a new report or choose an existing report to run, edit, or remove.

Report: Choose Report ▾

Cancel   New Report   Remove Report   Edit Report   Run Report

Back to Reports
Back to Main Menu

- Click the **Reports** link located in the Administrative Section of the Editor main menu.

- Click the **Custom Reports** link located in the Report Tools Section of the Reports list.

- Click on the **New Reports** button.

Creating Custom Reports

- Select the View that best describes the information you want to report on.
- Click "Get more help" for a list of views and the data elements available within that view.
- Click Submit.

Creating Custom Reports

Custom Report - People and Address View

Select the fields to include in the report.

[Cancel] [Submit]

Check All   Clear All

☐ Publication Code
☑ First Name
☐ Secondary First Name Field
☐ Middle Name
☑ Last Name
☐ Secondary Last Name Field
☐ Username
☐ Password
☐ Title
☐ Degree
☐ Nickname
☐ Person is a Publisher
☐ People Record is Inactive
☐ Publisher Role
☐ Person is an Editor
☑ Editor Role
☐ Editor Description
☐ Person is Available as a Reviewer

- Select the data elements that you want in your report.
- Click Submit.

Creating Custom Reports

- Constrain your report if necessary using the Criterion pulldown.
- Check the Create extraction data file for download to download the file.

Creating Custom Reports

- Click the Download the Data File link to download the file.
- Click the Save Report Definition button to Save the Report.

Creating Custom Reports

Save Custom Report

Report Name: Boot Camp 2018

Cancel   Submit

Custom Report

Create a new report or choose an existing report to run, edit, or remove.

Report: Choose Report ▼

Choose Report

Boot Camp 2018

Cancel   New Report   Remove Report   Edit Report   Run Report

Back to Reports
Back to Main Menu

- Name the report.
- The report will appear in Choose Report pulldown menu. You can choose to run, edit or remove the saved report.

Resources

How to utilize the "Help" link and the Aries video tutorial library; contacting your account coordinator

Resources: How to Get Help While Using EM

- If you're feeling stranded at some point in your workflow, fear not! There are multiple resources available that can be used to your advantage.

Resources: How to Get Help While Using EM

- The "Help" link
- The Video Library
- Contact your Account Coordinator

Resources: How to Get Help While Using EM

- Help Links and What They Do:

- The Release Notes detail what's new to EM in version 16.1, including details about the setup and advantages of the new author interface.

- The Release Digest is essentially a condensed version of the Release Notes. They list each new enhancement present in 16.1 what it does and the approximate time it takes to be configured.

- The link to Aries' Video Library brings up several pages of tutorial videos located on www.ariessys.com. These videos provide helpful, step by step tutorials on a range of EM processes, from updating your personal information to running and saving searches and results.

- In addition to these links, there is also a search bar that can be seen by clicking on the magnifying glass icon above the em logo. Users can enter a word or phrase they'd like to learn about into the bar, and multiple results can be brought up, explaining functionality, configuration and more.

Resources: How to Get Help While Using EM

ALL VIDEOS

Use 'CTRL + F' to search list by keyword

Action Links Compression
Adding Co-Authors
Article Workflow – Submission Items
Assessing Reviewers and Reviewer Statistics
Assigning Contributors in EM
Automated Image Quality Check
Automated Plagiarism Detection ⬆
Automatic Formatting of Bibliographic Information
Checking the Status of Submitted Manuscripts
Co-author Workflow
Collecting Social Media Content
Configure Issuing DOI at Acceptance
Configure Task Submittal Questions & Checklists
Configuring a Production Status
Contributor Invitation
Convenient Access to Reviewer Status Information
Conveniently Reminding Reviewers with Ad Hoc Letter
Creating Custom Fields for Details Page Display
CRediT Integration

LATEST RELEASES

Top Five Innovations for Reviewers Using Editorial Manager ★
ORCID Reviewer Recognition ★
Email AutoFill for Ad Hoc Letters ★
Editor Experience: Decision Letter Editing ★
Optimizing Metadata Extraction using Xtract ★
Transition to Xtract Submission Interface in Version 14.1: Updating Author Instructions ★
Reviewer Experience: Submitting Reviews in Editorial Manager ★
Manuscript Submission with Xtract in Editorial Manager ★
Top Five Tips for Authors Using Editorial Manager ★
Reviewer Experience: Responding to Reviewer Invitations in Editorial Manager ★
Editor Experience: Making a Decision ★
Assigning Reviewer Numbers ★

Adding Co-Authors

em

- The library offers dozens of tutorials and walkthroughs, from EAR-related videos to system administration.
- Step-by-step commentary can help guide users through processes.

You are survivors of Editorial Manager Bootcamp 2020!

Nothing can extinguish your determination!

Any Questions?