

Welcome to the 17th Annual
EMUG BOSTON

#EMUG2019



EMUG 2019

EM Bootcamp 2019



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BOOTCAMP AGENDA:

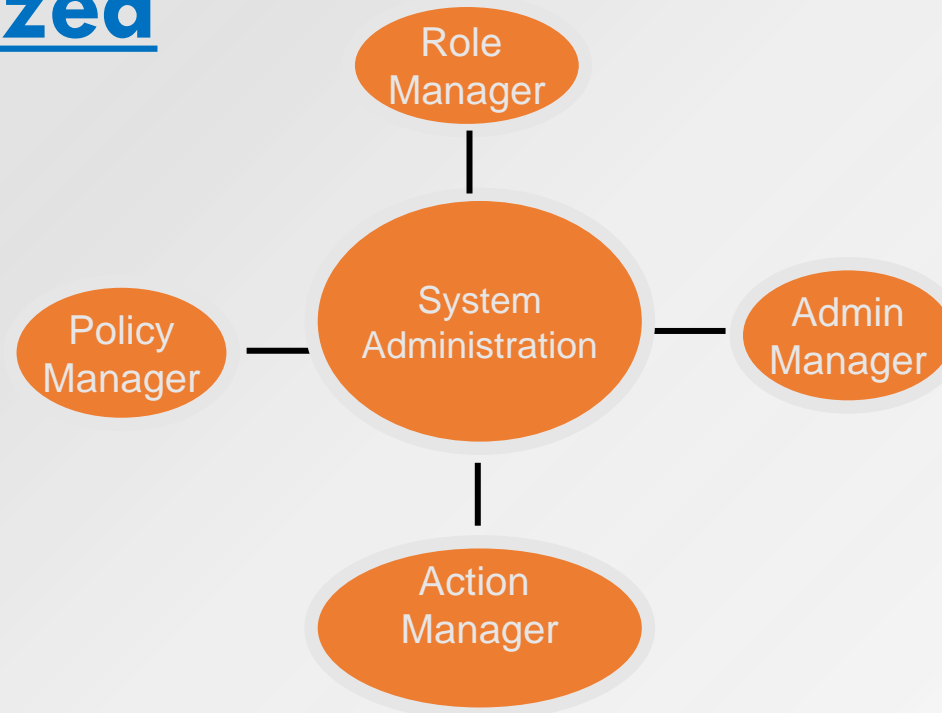
- Welcome
- Basic EM Structure
- A Brief Overview of System Administration
- -[The Author Submission Process](#): a walkthrough.
- -[Editorial Functionality](#): editor chains, editor designations.
- -[Reviewer Functionality](#): How to search for and invite reviewers.
- -[Basic Reporting](#): Saved 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.

How Editorial Manager is Organized



- 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.

System Administration

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



Training and Demo Site

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

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



Edit Role Definition

Role Name:*

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)
- 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

[+] Reviewer Invitations

[+] Editor Decisions

[+] Proposals/Commentaries



Action Manager



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 it's own letters configured

Action Manager Events Quick Reference Guide

http://www.editorialmanager.com/robohelp/14.1/index.htm#t=ActionManager_Events_Quick_Reference_Guide.htm&rhsearch=letter%20events&rhhlterm=letter%20events&rhsyns=%20



Action Manager

Reviewer Assigned

Event	Reviewer Letters
Request Unregistered Reviewer	<input type="text" value="NONE"/>
Reviewer Invited	<p><i>Original Submission:</i> Reviewer Invitation</p> <p><i>Revision - Re-Invite:</i> Reviewer Invitation on Revision</p> <p><i>Revision - First Invite:</i> Reviewer Invitation - Revision: First Invite</p> <p style="text-align: center;">Select Letters</p>
Reviewer Assigned (Not Invited)	<p><i>Original Submission:</i> Reviewer Assignment Letter</p> <p><i>Revision - Re-Invite:</i> Reviewer Assignment Letter</p> <p><i>Revision - First Invite:</i> Reviewer Assignment Letter</p> <p style="text-align: center;">Select Letters</p>
Reviewer Agree	<p><i>Original Submission:</i> NONE</p> <p><i>Revision - Re-Invite:</i> NONE</p> <p><i>Revision - First Invite:</i> NONE</p> <p style="text-align: center;">Select Letters</p>
Reviewer Decline	<input type="text" value="NONE"/>
Review Due Date Changed	<input type="text" value="Reviewer Instructions and Due Date"/>
Un-invite Reviewers Before Agreeing to Review	<input type="text" value="NONE"/>
Un-assign Reviewers After Agreeing to Review	<input type="text" value="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](#)

- [+ 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](#)
- [+ !\[\]\(0551a83d441798e532995956b603f604_img.jpg\) 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 Classifications Display Policy](#)
 - [Edit Classifications](#)
 - [Edit ...](#)
 - [Def ...](#)
 - [Cor ...](#)
 - [Sel ...](#)
 - [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	Editor/Publish		
			Invited	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		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove | Hide	
X Author Reminder Report Test Letter	Author Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove | Hide	
Welcome Letter - Go Live	Batch E-mail		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove | Hide	
Welcome	General	Author - New User Registers	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove | Hide	

Admin Manager



Training and Demo Site

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP



AdminManager Main Menu

[Set Live Journal Flag](#)
[Manage Publication Groups](#)
[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](#)

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



The Submission Process: Author Interface

Author Main Menu

[Alternate Contact Information](#)

[Unavailable Dates](#)

For additional help with your submission, please click [here](#) for the Author Tutorial.

New Submissions

[Submit New Manuscript](#)

[Submissions Sent Back to Author \(0\)](#)

[Incomplete Submissions \(1\)](#)

[Submissions Waiting for Author's Approval \(0\)](#)

[Submissions Being Processed \(1\)](#)

Revisions

[Submissions Needing Revision \(0\)](#)

[Revisions Sent Back to Author \(0\)](#)

[Incomplete Submissions Being Revised \(0\)](#)

[Revisions Waiting for Author's Approval \(0\)](#)

[Revisions Being Processed \(0\)](#)

[Declined Revisions \(0\)](#)

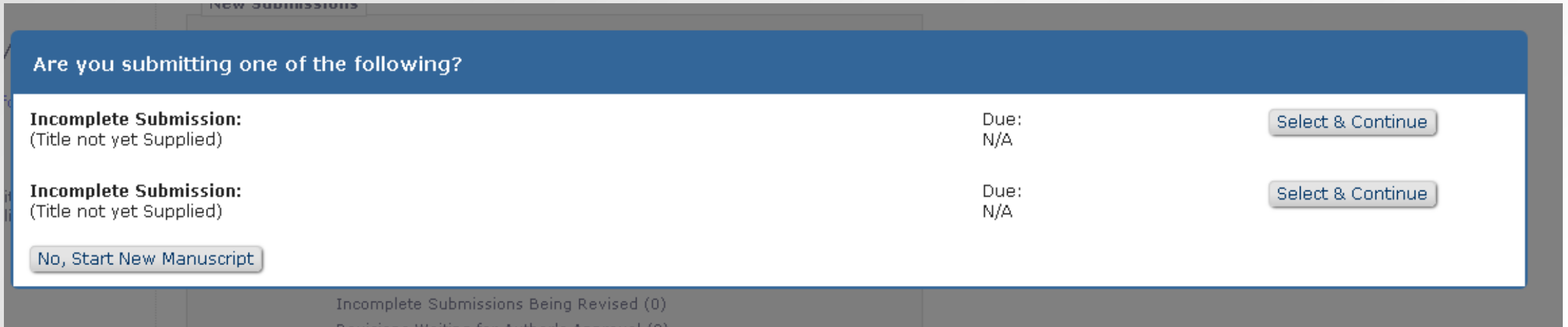
Completed

[Submissions with a Decision \(0\)](#)

[Submissions with Production Completed \(0\)](#)

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

Incomplete Submissions



The screenshot shows a pop-up message with a blue header and a white body. The header contains the question "Are you submitting one of the following?". The body lists two "Incomplete Submission" entries, each with a "Due:" date of "N/A" and a "Select & Continue" button. At the bottom left of the pop-up is a button labeled "No, Start New Manuscript". Below the pop-up, a navigation bar shows "Incomplete Submissions Being Revised (0)" and "Revisions Waiting for Author's Approval (0)".

Are you submitting one of the following?

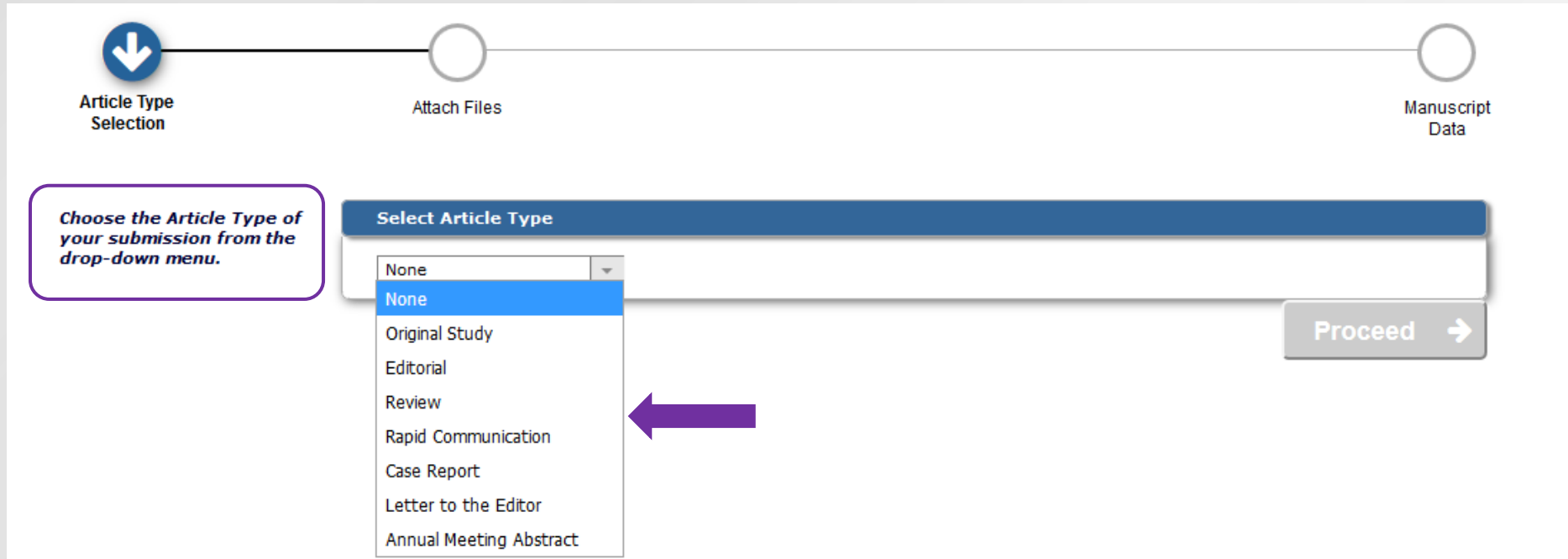
Incomplete Submission: (Title not yet Supplied)	Due: N/A	Select & Continue
Incomplete Submission: (Title not yet Supplied)	Due: N/A	Select & Continue

No, Start New Manuscript

Incomplete Submissions Being Revised (0)
Revisions Waiting for Author's Approval (0)

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 Process: *A New Look*



- 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

Article Type Selection

Attach Files

Manuscript Data

Choose the Article Type of your submission from the drop-down menu.

Select Article Type

Original Study

Proceed →


- 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

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

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

[Insert Special Character](#)

[Browse...](#) OR  **Drag & Drop Files Here**

No Items have yet been attached for this submission.

[← Back](#) [Proceed →](#)

- 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 screenshot shows a submission process flow with seven steps: Article Type Selection (completed), Attach Files (current step), General Information, Review Preferences, Additional Information, Comments, and Manuscript Data. Below the flow, there is a 'Required For Submission' section for Manuscript, with a note: 'Please provide any additional items, such as tables, figures or supplementary material.' The main form area includes a 'Select Item Type' dropdown set to '*Manuscript', a 'Description' field containing 'Manuscript', and a 'Manuscript Word Count' field. There is a 'Browse...' button, an 'OR' separator, and a 'Drag & Drop Files Here' area. An 'Insert Special Character' link is also present. Below the form, a table lists the uploaded file:

The order in which the attached items appear is the order established by this publication. You may re-order any items of the same type manually if necessary.

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	*Manuscript	Manuscript	Author Submission Demo.docx	11.4 KB	Apr 27, 2018	Edit Data Download	<input type="checkbox"/>

Buttons at the bottom include 'Update File Order', 'Remove', 'Check All', 'Clear All', 'Back', and 'Proceed'.

- 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

Article Type Selection

Attach Files

General Information

Review Preferences

Additional Information

Comments

Manuscript Data

Please provide the requested information.

Insert Special Character

Region Of Origin

Select the Region of Origin related to your submission from the drop-down menu below.

UNITED STATES

Next

Section/Category

Keywords

Classifications

Back Proceed

- “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

Insert Special Character

- Region Of Origin

Select the Region of Origin related to your submission from the drop-down menu below.

UNITED STATES

+ Section/Category

+ Keywords

+ Classifications

Insert Special Character

- Region Of Origin

Select the Region of Origin related to your submission from the drop-down menu below.

UNITED STATES

- Section/Category

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

None

- Keywords

Please enter keywords separated by semicolons. Each individual keyword may be up to 256 characters in length.

Limit 3 Keywords

Additional Information

Insert Special Character

+ Region Of Origin

- Section/Category

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

None

None

Basic Science Section

+ Clinical Section

+ Epidemiology Section

↓ Next

← Back Proceed →

- 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

[Insert Special Character](#)

+ Region Of Origin

+ Section/Category

- **Keywords**

Please enter keywords separated by semicolons. Each individual keyword may be up to 256 characters in length.

Limit 3 Keywords Keyword Count:3

Editorial; Manager; EMUG

↓ Next

+ Classifications

← Back **Proceed** →

- 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

[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](#)

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

Please identify your manuscript's areas of Interest and specialization by selecting one or more classifications from the list below. Click 'Submit' at the bottom of the page when you are done.

To save changes you must click "Submit" before you leave this window. ([less...](#))

Search: [Search](#) [Clear](#)
[Matching terms display in red text]

[Expand All](#) [Collapse All](#)

- 1: **Pasta**
 - .01: Penne
 - .02: Linguini
- 10: **First Major Term**
- 20: **Second Major Term**
- 30: **Third Major Term**

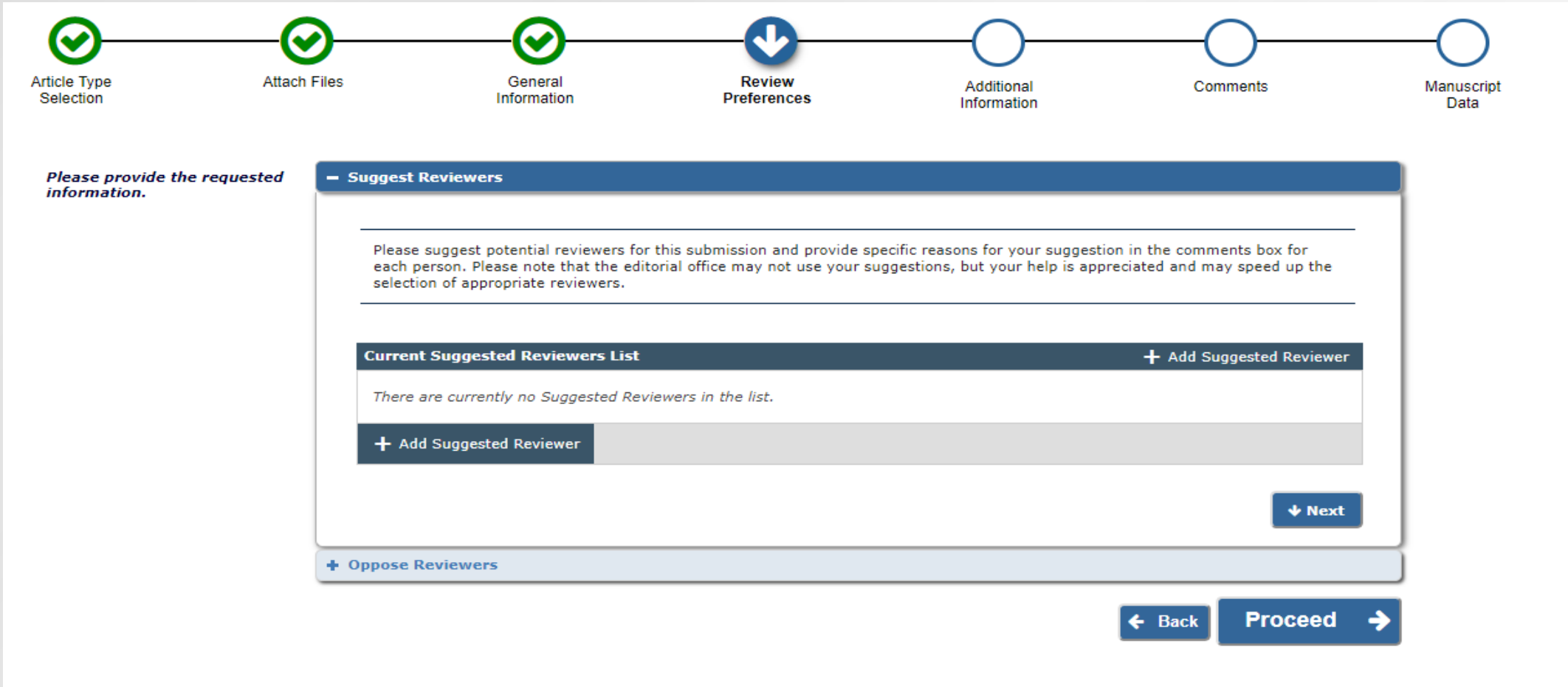
Selected Classifications: Select up to 3 Classification(s)

- 1: **Pasta**
- 1.01: Penne
- 1.02: Linguini

[Add->](#)
[<-Remove](#)

- 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.
- A classifications list can be hierarchical, with a major term (e.g "Pasta") being followed up with a subset of minor terms (e.g "Penne", "Linguini")

Reviewer Preferences



The image shows a workflow diagram at the top with seven steps: Article Type Selection, Attach Files, General Information, Review Preferences, Additional Information, Comments, and Manuscript Data. The 'Review Preferences' step is highlighted with a downward arrow icon, while the others have checkmarks or empty circles. Below the diagram is a form titled 'Suggest Reviewers'. The form contains a text area with instructions: 'Please suggest potential reviewers for this submission and provide specific reasons for your suggestion in the comments box for each person. Please note that the editorial office may not use your suggestions, but your help is appreciated and may speed up the selection of appropriate reviewers.' Below this is a section titled 'Current Suggested Reviewers List' with a '+ Add Suggested Reviewer' button on the right. The list area contains the text 'There are currently no Suggested Reviewers in the list.' and another '+ Add Suggested Reviewer' button. At the bottom right of the form is a 'Next' button. Below the form is a '+ Oppose Reviewers' section. At the very bottom are 'Back' and 'Proceed' buttons.

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

- Suggest Reviewers

Please suggest potential reviewers for this submission and provide specific reasons for your suggestion in the comments box for each person. Please note that the editorial office may not use your suggestions, but your help is appreciated and may speed up the selection of appropriate reviewers.

Current Suggested Reviewers

There are currently no Suggested Reviewers

+ Add Suggested Reviewer

+ Oppose Reviewers

Enter Suggested Reviewer Details

Insert Special Characters

Given/First Name * Claire

Middle Name

Family/Last Name * Commentator

Degree

Position

Institution

Department

E-mail * trash14@ariessco.com



Reason

- 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.

- Suggest Reviewers

Please suggest potential reviewers for this submission and provide specific reasons for your suggestion in the comments box for each person. Please note that the editorial office may not use your suggestions, but your help is appreciated and may speed up the selection of appropriate reviewers.

Current Suggested Reviewers List + Add Suggested Reviewer

  **Claire Commentator**

+ Add Suggested Reviewer

- Oppose Reviewers





Please identify anyone who you think should not review your submission in the comments box here, but will try to accommodate your request if possible to allow us to identify potential reviewers to review your submission in the future.

Currently Opposed Reviewers

There are currently no Opposed Reviewers.

+ Add Opposed Reviewer

Enter Opposed Reviewer Details ✕

    Insert Special Characters

Given/First Name *

Middle Name

Family/Last Name *

Degree

Position

Institution

Department

E-mail *

Reason *

- Authors can also suggest reviewers who should **not** review their submission. The same information fields are available as for suggesting a reviewer.

Additional Information

Questionnaire

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

Answer Required:

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

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
Limit 200 characters

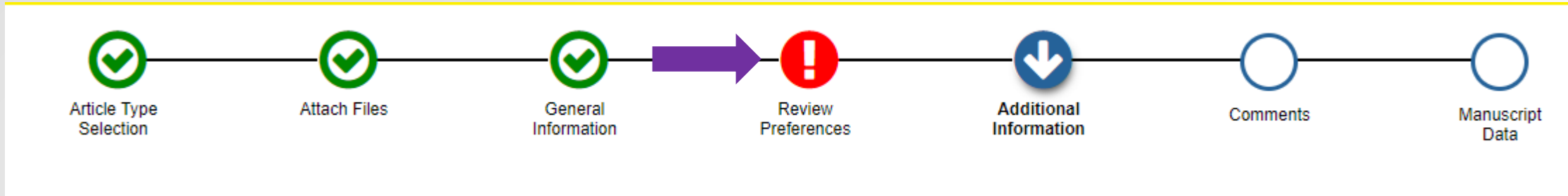
- Questions and questionnaires are configured in PolicyManager.
- Question responses can be configured in a variety of formats, from text boxes, to numerical ratings systems, to checkboxes with pre-written responses.
- Questions can be configured to be required or optional.

Comments

The screenshot shows a progress bar at the top with seven steps: Article Type Selection, Attach Files, General Information, Review Preferences, Additional Information, Comments, and Manuscript Data. The first five steps are marked with green checkmarks, while 'Comments' is marked with a blue downward arrow and 'Manuscript Data' with a blue circle. Below the progress bar, the text 'Please provide the requested information.' is displayed. To the right, there is a link for 'Insert Special Character'. The main content area is a blue-bordered box titled 'Enter Comments'. Inside, there is a text area with the instruction: 'Please enter any additional comments you would like to send to the publication office. These comments will not appear directly in your submission.' Below this is a text input field containing the text 'Submitting with EM has been fantastic!'. At the bottom right of the form, there are two buttons: 'Back' with a left arrow and 'Proceed' with a right arrow.

- Comments that authors have for the editorial office can be entered here.

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

Title

Full Title (required) ✓
Limit 300 characters Character Count: 22

Author Submission Demo 

Secondary Full Title

Short Title
Limit 20 words

[Next](#)

Abstract

Abstract (required) ✓
Limit 100 words Word Count: 11


This paper demonstrates how to submit a manuscript to Editorial Manager.


Secondary Abstract

Authors

You may reorder the authors by dragging and dropping an Author's summary line to the correct position in the Current Author List.

Current Author List + Add Another Author

 **Mr. Zdeno Chara [Corresponding Author] [First Author] [You]**
Smithsonian Institution

+ Add Another Author 

[Next](#)

- 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

Authors

You may reorder the authors by dragging and dropping an Author's summary line to the correct position in the Current Author List.

Current Author List + Add Another Author

Mr. Zdeno Chara [Corresponding Author] [First Author] [You]
Smithsonian Institution

+ Add Another Author

Next

Enter Author Details

Insert Special Characters

Given/First Name* Claire

Middle Name

Family/Last Name* Commentator

Academic Degree(s)

Affiliation

E-mail Address* trash14@ariessco.com

ORCID Fetch

What is ORCID?

Contributor Roles

Instructions

Conceptualization

Data curation

Formal analysis

Funding acquisition

Investigation

Methodology

Project administration

Resources

Select degree

Select degree

Lead

Equal

Supporting

Select degree

- 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

Please choose a funding source from the list that displays as you start to enter the funder's name. If you are unable to make a selection from the list you can continue to enter the entire funder's name. Then enter the award number and select the award recipient.

Required *

Funding information is not available.





Current Funding Sources List + Add a Funding Source

There are currently no Funding Sources in the list

+ Add a Funding Source

- 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”

Enter Funding Source Details ✕

    Insert Special Characters

Find a Funder:

Award Number:

Grant Recipient: ▼

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

- 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 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

Submissions Waiting for Approval by Author Zdeno Chara

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 Edit Submission to make changes to the meta-data and to remove and upload new files that make up your submission.

The 'Remove Submission' link removes your submission from the system. Please use this ONLY if you would like to permanently remove this submission from the system.

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	<input checked="" type="checkbox"/> I accept

Page: 1 of 1 (1 total submissions)

- 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!



You've successfully submitted a manuscript in Editorial Manager!



Now, let's take a break.

Assigning an Editor

Editor Main Menu

Editor 'To-Do' List

My Pending Assignments (26)

[New Submissions \(12\)](#)

[Revised Submissions \(0\)](#)

[New Submissions Requiring Assignment \(9\)](#)

[Revised Submissions Requiring Assignment \(2\)](#)

[New Invitations \(0\)](#)

[New Assignments \(0\)](#)

[Submissions with Rescinded Decision \(3\)](#)

[Submissions with Required Reviews Complete \(0\)](#)

[Submissions Requiring Additional Reviewers \(0\)](#)

[Submissions with One or More Late Reviews \(0\)](#)

[Reviews in Progress \(0\)](#)

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

[Submissions Under Review \(0\)](#)

MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS Role: Super User (all access) Username: JohnH

Quicklinks

New Submissions - John Super User, MD

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

Page: 1 of 2 (12 total submissions) 1 2 ▶▶

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Similarity Check/Thenticate Report (80%) Duplicate Submission Check (100%) Details Initiate Discussion History Technical Check View QC Results File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions Google Scholar Title Search Google Title Search Google Scholar Author Search	WEBDEM-D-18-00005	Original Study	Invited Editor Section	Papillary fibroelastoma of a mitral valve chordae - case report	Allan Author MD	May 31, 2018	May 31, 2018	Manuscript Submitted

- 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.

Assigning an Editor

Action

- View Submission
- Duplicate Submission Check (9%)
- Details ▾
- Initiate Discussion
- History
- Technical Information
- File Inventory
- Edit Submission
- Send Back to Author
- Remove Submission
- Classifications
- Assign Editor**
- Set Final Disposition
- Initiate Production
- Send E-mail
- Linked Submissions

Assign Editor

Manuscript Number: DEMOHW141-D-18-00032

Title: Petrol, Diesel or Electricity? Tomorrow's vehicles discussed

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

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

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

Manuscript Classifications

(1) Biotechnology; (2) Bioinformatics; (3) Nanotechnology

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Editor	Amy Winehouse ▾	2	0		Yes
<input type="radio"/>	Senior Editor	Sarah Senior ▾	0	0		Yes
<input type="radio"/>	Editorial Board	Olivia Opinion ▾	2	0		Yes
<input type="radio"/>	Managing Editor	mary mary ▾	3	0		Yes
<input type="radio"/>	Editor-in-Chief	Edwin Expert ▾	0	0		Yes
<input type="radio"/>	Editor	Edward Editor ▾	1	0		Yes
<input checked="" type="radio"/>	Editor	Claire Commentator ▾	1	1	1	Yes

- 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.

Editor Chain

Editors	
Name:	mary mary ▾ [Proxy]
Role:	Managing Editor
Date Assigned:	06-06-2018
Date Completed:	
Elapsed Days:	0
Recommendation:	
<hr/>	
Name:	Claire Commentator ▾ [Proxy]
Role:	Editor
Date Assigned:	06-06-2018
Date Completed:	
Elapsed Days:	0
Recommendation:	
<hr/>	
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:	Clinical 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:	<input type="text"/>  (mm/dd/yyyy)
Submission Target Volume:	<input type="text"/>
Submission Target Issue:	<input type="text"/>
Transmittal Form:	Link to Transmittal Form
Author Days To Revise:	<input type="text" value="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 Search and Selection

Terminology Time! 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

Return to View All Assigned Submissions

Return to Main Menu

View Submission Information

Manuscript Details  

History

Classifications

View Submission

Author's Reviewer Preferences

Quick Action Links

Send E-mail

Register and Select New Reviewer

Set Preferences

My Suggest Reviewer Preferences

My Reviewer Display Preferences

Reviewer Selection Summary - Submission DEMOHW141-D-18-00029

Frankie Hollywood
The Sights and Sounds of Cambridge

Reviewer Search

Search My Publication Search for Reviewers from All Reviewers

Review Settings

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 2 [\[Change\]](#) review(s) have been completed.

Automatically un-invite Reviewers who do not respond to an invitation within 5 [\[Change\]](#) day(s). [\(more...\)](#)

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

Selected Reviewers

- This useful page 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?

Reviewer Search

Search My Publication Search for Reviewers from All Reviewers Go

Reviewer Search

Search My Publication Search by Classification Matches from All Reviewers Go

Reviewer Search

Search My Publication Suggested by Author from All Reviewers Go

- 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.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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		<input type="checkbox"/>	<input type="checkbox"/>

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 Name
Inv.	Asn.	Alt.	Prop.	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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 results per page.

Classification	Number of Reviewers
<input type="checkbox"/> 1 EMUG Presentations	5
<input type="checkbox"/> 1.01 Introduction to EAR	3
<input type="checkbox"/> 1.02 EM Bootcamp	5

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

Inv.	Asn.	Alt.	Prop.	Name	Member	Classifications	(Agreed Invitations)	Invitation Statistics
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Abby Olivia Author (Reviewer)	No	2 Class match with MS * 1: EMUG Presentations * 1.02: EM Bootcamp	Reviews in Progress: 0 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Last Review Completed: - Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0	Date Last Invited: - Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charles Critic (Reviewer)	No	3 Class match with MS * 1: EMUG Presentations * 1.01: Introduction to EAR * 1.02: EM Bootcamp	Reviews in Progress: 0 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Last Review Completed: - Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0	Date Last Invited: - Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0

This publication:
 Author may have suggested this reviewer; a match on first and last name was found.



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.

View Reviews and Comments

- Action**
- View Submission
- Similarity Check/iThenticate Results (31%)
- Duplicate Submission Check (0%)
- Details ▾
- History
- Classifications
- Unassign Editor
- File Inventory
- Edit Submission
- Invite Reviewers
- Solicit Commentary
- Notify Editor
- View Reviews and Comments**
- Set Final Disposition

View Reviews and Comments for Manuscript
WEBDEM-D-18-00009
"Standing by Your Man: it's Overrated"
Original Submission

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

[Attachments \(1\)](#) [View Manuscript Rating Card](#) [View Review Question Responses](#)

WEBDEM-D-18-00009
"Standing by Your Man: it's Overrated"
Original Submission

Oliver Bennett (Reviewer 2)
Edit Reviewer Comments

Reviewer Recommendation Term: Minor Revision

Overall Reviewer Manuscript Rating: N/A

Rate Review: Please enter a number from 1-100

Manuscript Rating Question(s)	Scale	Rating
The subject addressed in this article is worthy of investigation.	[1-3]	2
The information presented was new.	[1-5]	3
The conclusions were supported by the data.	[1-10]	6

Custom Review Question(s)	Response
Is there a financial or other conflict of interest between your work and that of the authors?	No
Would you be willing to review a revision of this manuscript?	No
Which of the following categories do you feel this submission fits into?	<input type="checkbox"/> Education <input type="checkbox"/> Emerging Technologies

Comments to Editor:

Terrible author. SAD

- 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.



Making a Decision

Editor Decision and Comments for Manuscript Number DEMOHW141-D-18-00029

The Sights and Sounds of Cambridge

Original Submission
Claire Commentator (Editor)

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

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

Original Submission	
Claire Commentator (Editor)	Assigned - No Decision
mary mary (Managing Editor)	Assigned - No Decision
Author Decision Letter	
Frankie Hollywood (Author)	

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

Please rate the article as appropriate.

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

- 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.

Managing People Records



User Records

- Use search people to locate user records.
- Clicking the users name opens the user's record.

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

Criterion	Selector	Value	User Role
Last Name	Begins With	author	ALL
Last Name	Begins With		END
Last Name	Begins With		END

Page: 1 of 1 (3 total People Matches) Display 25 results per page.

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



User Records

Search People - Update Information

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

Abby Olivia Author

Proxy-Registered:
Jun 14, 2018
(Data Unconfirmed by User)

Last Modified:
Jun 14, 2018

Viewed Privacy Policies:
(has not viewed them yet)

[Inactivate this User](#)

User Information

[Open Special Character Palette](#)

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

Default Login Role:

Default Login Menu:

Available as a Reviewer? Yes No

Board Member? Yes No

Forbidden as a Reviewer? Yes No

Reviewer Role *

Publisher Role *

Editorial Role *

Editor Description

[Activity Details](#)

[Additional People Details](#)

- Inactivate the user
- Assign user roles
- View Activity Details

User Records

Personal Information

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

Given/First Name * Abby

Middle Name Olivia

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 * trash18@ariessc.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](#)

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 **1: EMUG Presentations**
1.02: EM Bootcamp

Personal Keywords (None Defined)

Institution Related Information

Position

Institution (max 300 characters)

Department (max 450 characters)

Street Address

City

State or Province

Zip or Postal Code

Country or Region * UNITED STATES

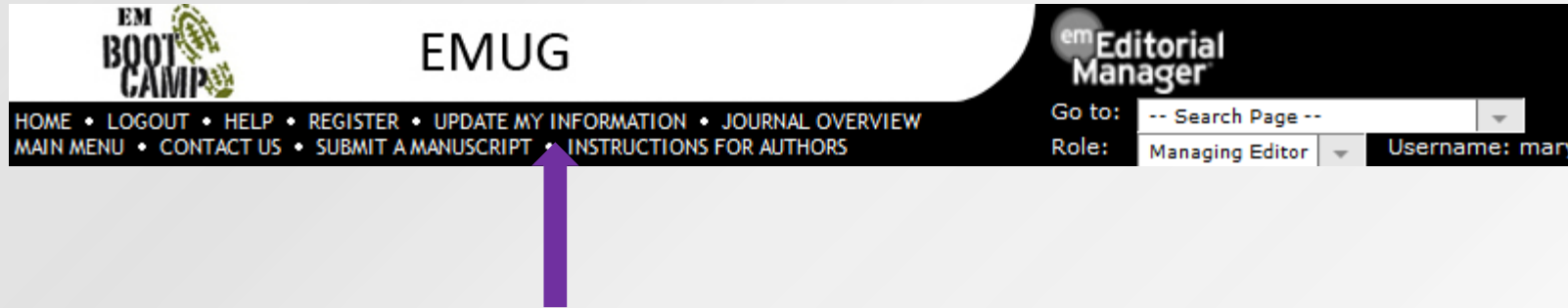
Address is for * Work Home Other

People Notes

- 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.


User Records – 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 Duplicate Users

Page: 1 of 1 (3 total People Matches) Download Search Results Display 25 results per page.

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

Page: 1 of 1 (3 total People Matches) Download Search Results Display 25 results per page.

Merge People Records Download Search Results



- Select the users to be merged and click the Merge People Records button.

User Records – Merge Duplicate 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

Abby Author (abby)

UNITED STATES
trash18@ariessc.com

Roles: Author

User has History? Yes

User has Current Assignments? Yes

User has Shared their Searches? No

User has not viewed privacy policies

People Record Last Update Date: 06/08/2018

Personal Classifications:

This user has no personal classifications

Combine and Keep this Record

Combine and Keep this Record

Abby Olivia Author (AbbyAuthor)

UNITED STATES
trash18@ariessc.com

Roles: Author, Reviewer

User has History? No

User has Current Assignments? No

User has Shared their Searches? No

User has not viewed privacy policies

People Record Last Update Date: 06/14/2018

Personal Classifications:

1 EMUG Presentations
1.02 EM Bootcamp

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.

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

Searching Submissions

The screenshot displays the Editorial Manager interface. At the top left is the Aries systems logo and the text "Training and Demo Site". A navigation bar contains links: HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. The user's role is "me: melc". A "Go to:" dropdown menu is open, showing options: -- Search Page --, Submissions (highlighted), Submissions (Production), Proposals, People, -- Quick Access --, Production Status Grid, and System Administrator Functions. Below the menu, a "Submissions With:" table shows counts for 0, 1, and 2 reviews complete. A "Search" box contains the text "Search Submissions | Search People".

Submissions With:

0 Reviews Complete	1 Reviews Complete	2 Reviews Complete
0	0	0

Search

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

- Editors with permission can search submission.
- Search from “Go To” menu or Search Submissions link.

Searching Submissions

Search submissions selection criteria

Display search results in PowerGrid

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

Search Definition: Choose Saved Search ▾

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

Help with Searching Insert Special Character Value Options Advanced Criteria

(	Criterion	Is/Is not	Selector	Value)
▾	Manuscript Number	is	Contains		▾

- Classification
- Color Figure Requested
- Submission Flag Name
- Production Status Term
- Sub. Target Online Publication Date
- Sub. Actual Online Publication Date
- Pre-Selected Schedule Group
- Schedule Group Description
- Schedule Group Notes
- Schedule Group Target Online Publication Date
- Schedule Group Target Publication Date
- Schedule Group Target Publication Volume
- Schedule Group Target Publication Issue
- Target Number of Pages
- Black and White Image Count

Add

Clear Search

ifications; you can copy and paste Values from there.
 e date is not entered in this format, you will be required to re-enter the date in the specified
 x to execute a search. We recommend entering as much criteria as you know. The more
 ed.
 es to ensure the evaluations are carried out in the right order. If you do not use
 the AND relationship is evaluated first.
 case value.
 "Unspecified" Selector.

Editorial Menu
 Production Tasks Menu
 Production Status Grid

Search submissions selection criteria

Display search results in PowerGrid

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

Search Definition: Choose Saved Search ▾

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

Help with Searching Insert Special Character Value Options Advanced Criteria

(	Criterion	Is/Is not	Selector	Value)
▾	Submission Flag Name	is	Equal To	Missing Copyright Tra	▾

Add

Clear Search



Searching Submissions





Search Submissions - Search Results
Submission Flag Name is equal to 'Missing Copyright Transfer Information'

Page: 1 of 1 (6 total submissions) 10 results per page. ⚙️

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classification	Current Status	Status Date	Initial Date Submitted	Review Status
Action Links 	WEBDEM-D-11-00007R1		Super User ▾	RADT May 9 Training	Original Study		RADT;May 9;Training;	10: First Major Term 20: Second Major Term 20.500: Minor Term unclassified	Completed Accept	May 16, 2011	May 09, 2011	
Action Links 	WEBDEM-D-11-00018		Super User ▾	Test Paper 5/3/11	Annual Meeting Abstract			10: First Major Term 10.200: Minor Term unclassified 20: Second Major Term	Accept and Transmit Conference Submission	Aug 12, 2011	Aug 12, 2011	

Missing Copyright Transfer Information

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

-  Save Search
-  Download Search Results
-  Search Again
-  Learn More



Searching Submissions

Quick Search

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

Save Search Criteria

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

Criteria	Search Criteria Name
Submission Flag Name is equal to 'Missing Copyright Transfer Information'	<input type="text" value="Boot Camp 2018"/>
	<input checked="" type="checkbox"/> Show this Search in Main Menus

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

Super User (all access) Main Menu

Quick Searches:
[Boot Camp 2018](#)
[test 5/3/11](#)

Submissions With:

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

Search

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

Searching Submissions

Search submissions selection criteria

Display search results in PowerGrid

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

Search Definition: Choose Saved Search

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

Help with Searching Insert Special Character Value Options Advanced Criteria

(	Criterion	Is/Is not	Selector	Value)
	Manuscript Number	is	Contains		
	Classification				
	Color Figure Requested				
	Submission Flag Name				
	Production Status Term				
	Sub. Target Online Publication Date				
	Sub. Actual Online Publication Date				
	Pre-Selected Schedule Group				
	Schedule Group Description				
	Schedule Group Notes				
	Schedule Group Target Online Publication Date				
	Schedule Group Target Publication Date				
	Schedule Group Target Publication Volume				
	Schedule Group Target Publication Issue				
	Target Number of Pages				
	Black and White Image Count				

Help with
• Use
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• Sel
• You

Editorial Menu
Production Tasks Menu
Production Status Grid

Sharing Saved Searches

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

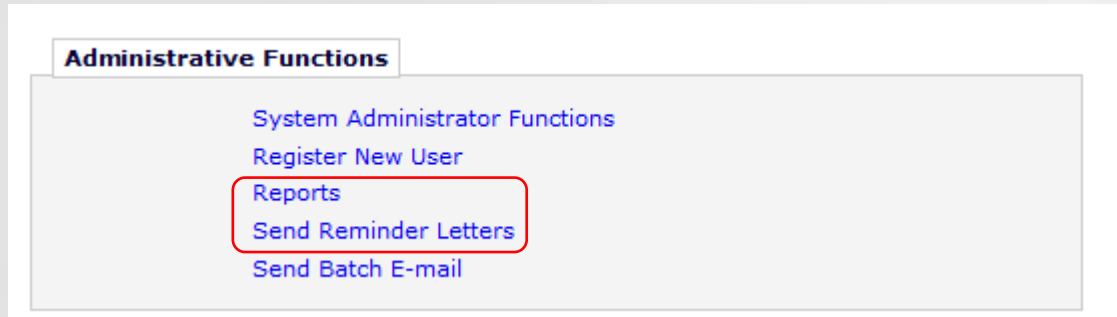
Save Search Criteria

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

Cancel Proceed

Include	Role:
<input type="checkbox"/>	Managing Editor
<input type="checkbox"/>	Editor (by invitation)
<input type="checkbox"/>	Editorial Assistant - with tech check
<input type="checkbox"/>	Super User (all access)
<input type="checkbox"/>	Editor-in-Chief

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

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

☐ **Editor Assignment Policies**

[Set Editor Assignment Options](#)

[Define Editor Assignment Chain Templates](#)

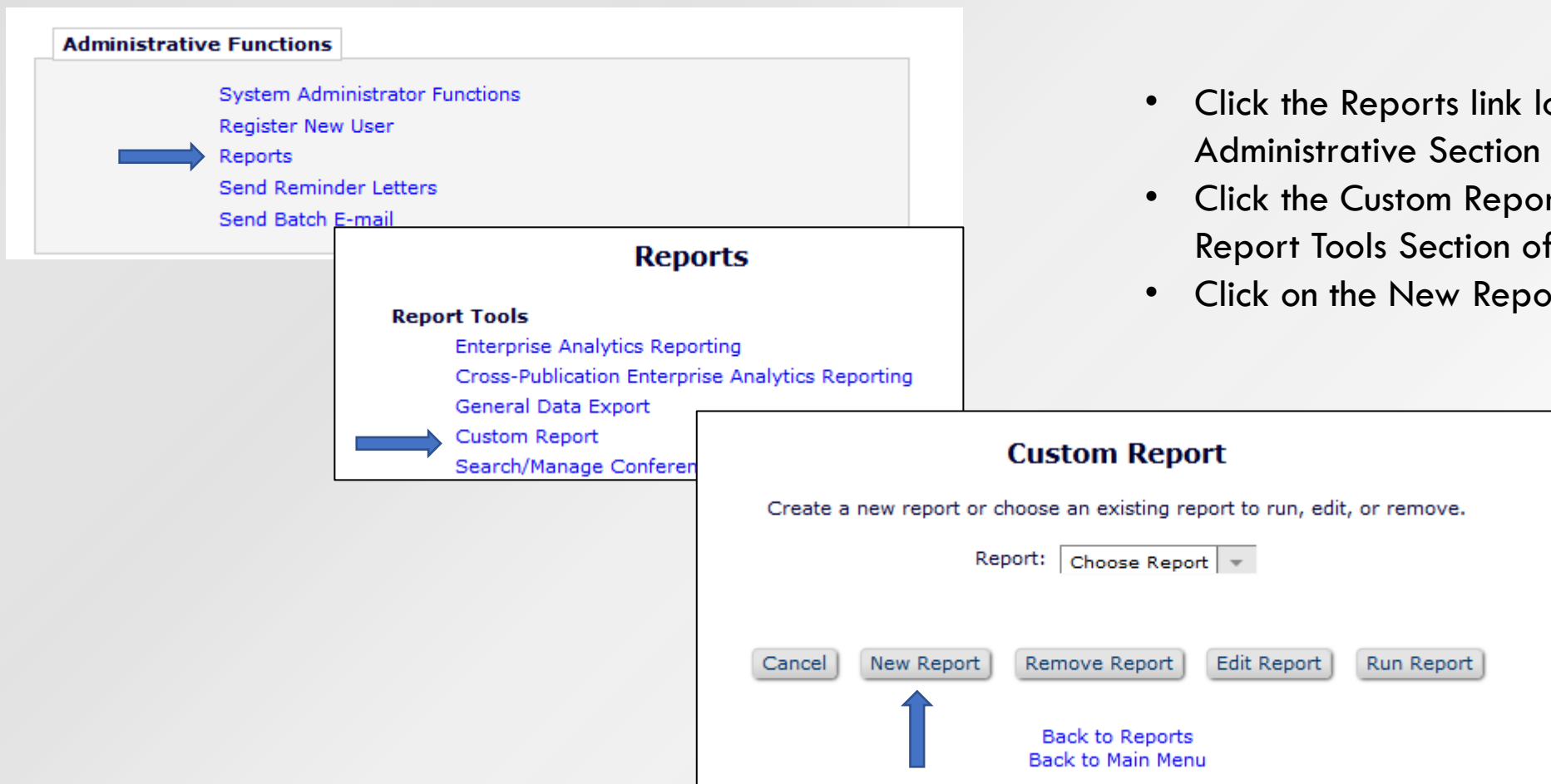
[Set Editor Rotation Participants](#)

[Edit Instructions on Modify Editor Chain Page](#)

[Configure Automated Summary Reminders](#)

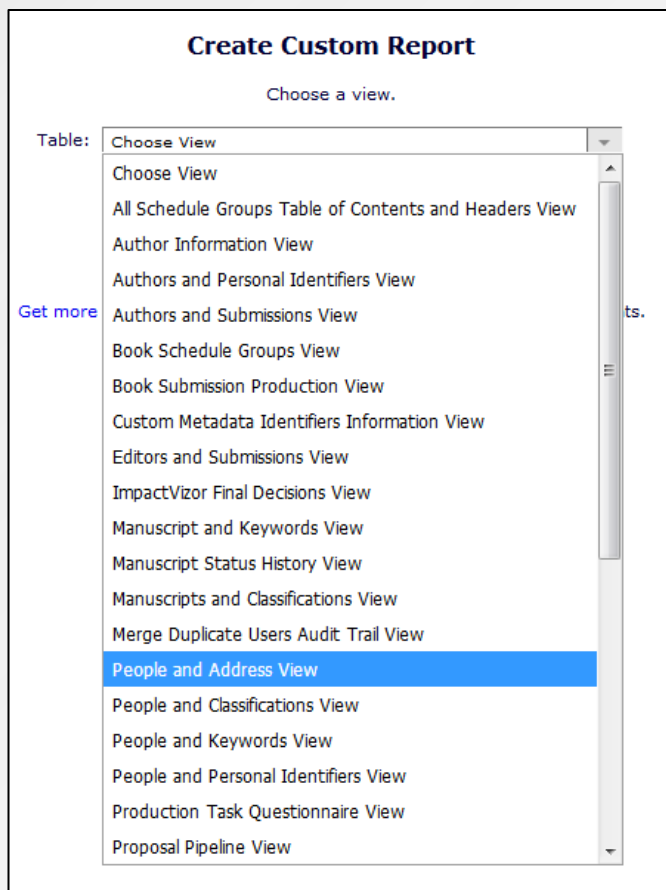
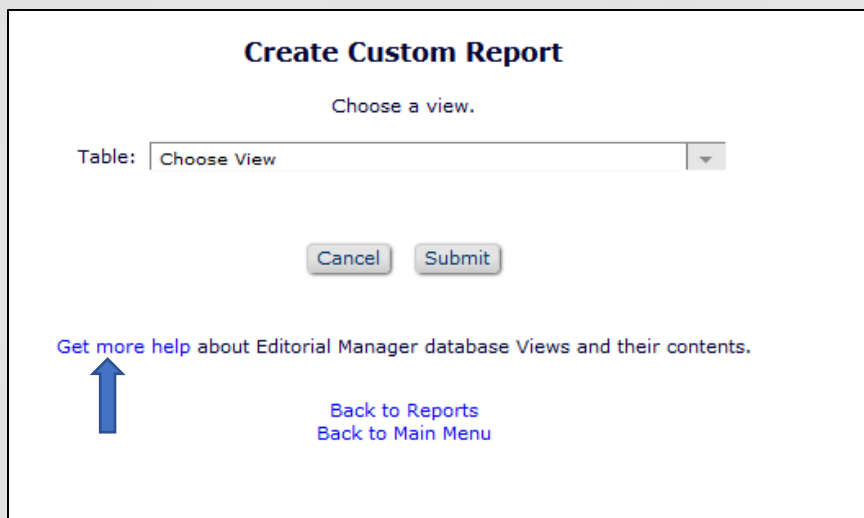


Creating Custom Reports



- 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.

[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

Custom Report - People and Address View

Choose the criterion for selecting People and Address View Records: To run a report in cross-publication mode, select the 'Cross-Publication Report - All Publications' checkbox. Selecting this checkbox will include all sites associated with the same publisher.

[Insert Special Character](#)

[Help with Searching](#)

Criterion	Selector	Value
Publication Code	CONTAINS	
Publication Code	CONTAINS	
Publication Code	CONTAINS	
Publication Code	CONTAINS	
Publication Code	CONTAINS	

First ORDER BY First Name in ASCENDING order.

Then ORDER BY First Name in ASCENDING order.

Exclude inactivated users

Cross Publication Report - All Publications

Show results onscreen

Create extraction data file for download

Show summary only


Download extraction data file only

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

Creating Custom Reports

Custom Report - People and Address View

Display First Name, Last Name, Editor Role, Reviewer Role, Institution, E-mail Address from People & Address View

[Download the Data File](#) 

[Download the data file in Unicode format - UTF-8](#)


Page: 1 of 14 (136 total records searched) 1 2 3 4 5 6 7 8 9 10 >> >| Display results per page.

First Name	Last Name	Editor Role	Reviewer Role	Institution	E-mail Address
Oliver	moore				trash1@ariessys.com
pippy	longstocking				trash1@ariessys.com
Anne	Gable				trash1@ariessys.com
Mary	Jones				trash1@ariessys.com
Caroline	Webber				trash1@ariessys.com
Winnifred	LaFarge				trash1@ariessys.com
author	one			Institution	trash1@ariessys.com
Associate	Editor				trash1@ariessys.com
tony	alves				trash1@ariessys.com
wendy	wendy		Test Reviewer		trash1@ariessys.com

Page: 1 of 14 (136 total records searched) 1 2 3 4 5 6 7 8 9 10 >> >| Display results per page.

[Download the Data File](#)

[Download the data file in Unicode format - UTF-8](#)

[Save Report Definition](#) 

[Modify Output Fields](#)
[Modify Search Criteria](#)

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

- 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:

Custom Report

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

Report:

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

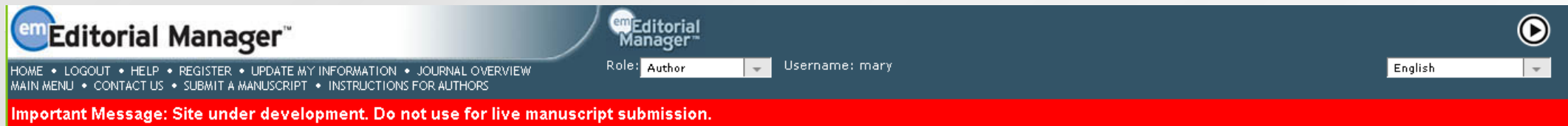
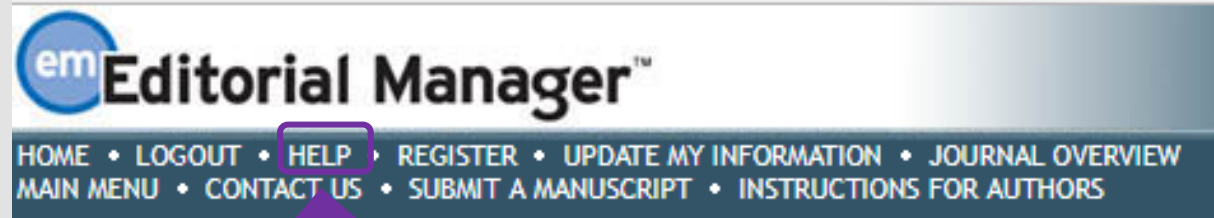
- Name the report.
- The report will appear in Choose Report pulldown menu. You can choose to run, edit or remove the saved report.

Resources: How to 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.

Where to Find Help



- The “Help” link
- The Video Library
- Contact your Account Coordinator



Help System

What's new in version 14.1?

Complete feature details can be found in the [Release Notes](#)!

Short on time? Try the [Release Digest](#)!

Browse additional resources on our [Video Library](#)!

[Minimum System Requirements](#)

Help Links and What They Do:

- The [Release Notes](#) detail what's new to EM in version 14.1, 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 14.1, 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.

Aries Video Library

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 Letters
- 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 ★



- 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 2019!



Nothing can extinguish
your determination!