Welcome to EMUG 2015

em Editorial Manager®
www.editorialmanager.com

Aries systems
Publish Faster. Publish Smarter.

The Lonely and Neglected
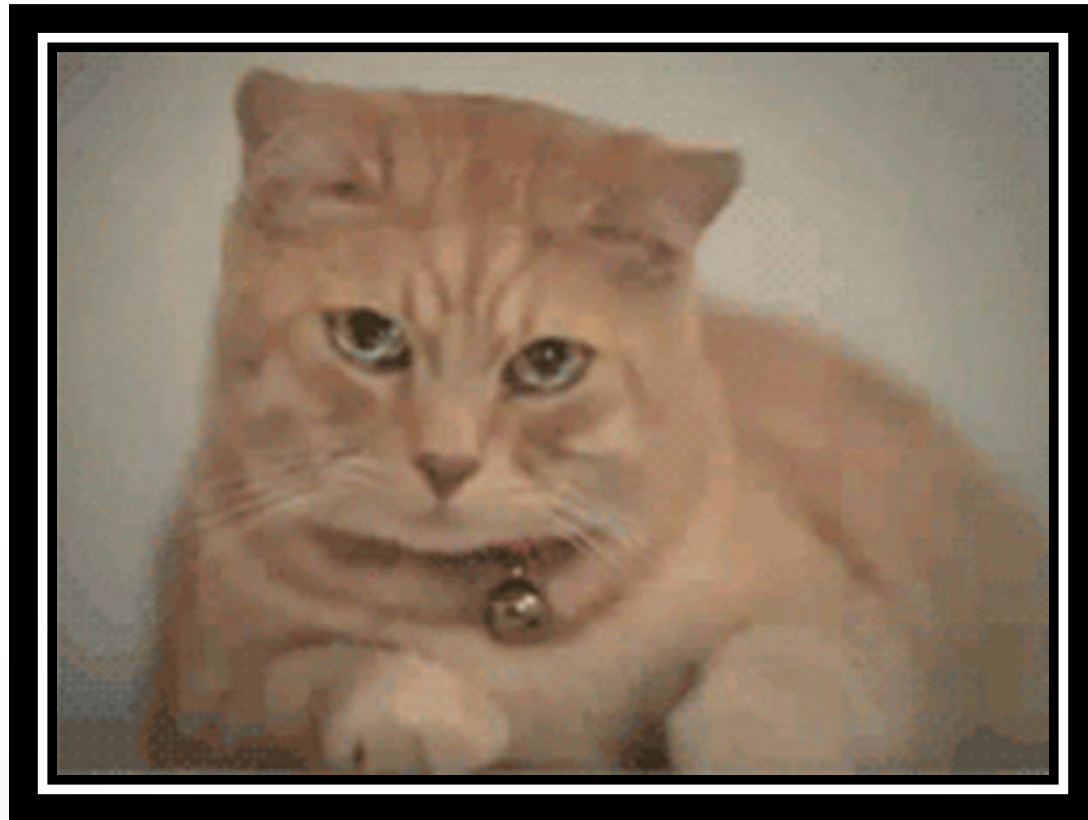
Custom Password Profiles

o Back-End Configuration

o Fine-Tune Login Security Requirements for Users

Configuration

o Ask your Aries Account Coordinator

Rule	Authors	Reviewers	Editors	Publishers
Passwords must be a minimum of [8] characters	☑	☑	☑	☑
Password cannot be the same as the username	☑	☑	☑	☑
Password cannot be the same as the user's first or last name	☑	☑	☑	☑
Passwords must be alpha-numeric	☐	☐	☐	☐
Passwords must be mixed case	☐	☐	☐	☐
User must change password on first access (new registrations and proxy registrations) after password reset	☐	☐	☐	☐
Password cannot be the same as any of the last [3] passwords used by this user	☐	☐	☐	☐
Password cannot be used by the same account in at least the last [12] months	☐	☐	☐	☐
User account will be locked (*i.e.*, user cannot login) after [5] failed login attempts in [5] minutes	☑	☑	☑	☑
Passwords expire after [365] days	☐	☐	☐	☐

Application

Change Password

Publication policy requires that you change your password for security purposes. An asterisk (*) is displayed below next to the rule(s) with which the current password conflicts. Please enter a password that complies with these guidelines.

New Password [   ]

Re-type New Password [   ]

Cancel   Submit

Password Rules

| |
|---|
| *Passwords must be a minimum of 8 characters. |
| Password cannot be the same as the username. |
| Password cannot be the same as the user's first or last name. |
| *Passwords must be alpha-numeric (i.e., must contain both letters and numbers.) |
| *Passwords must be mixed case (i.e., must contain both upper and lower case letters.) |
| User must change password on first access (new registrations and proxy registrations) and after password reset. |
| Password cannot be the same as any of the last 3 passwords used by this user. |
| Password cannot be used by the same account in at least the last 12 months. |
| User account will be locked (i.e., user cannot login) after 3 failed login attempts in 3 minutes. |
| Passwords expire after 5 days. |

Cancel   Submit
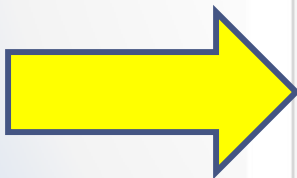
Send Ad Hoc E-mail

o Allows Users to Communicate through EM

o All Communication is Recorded in Submission History

Configuration

o RoleManager Permission for Each Role Family

o Letters Configured in PolicyManager

☑ Send Ad Hoc E-mail ← **RoleManager**

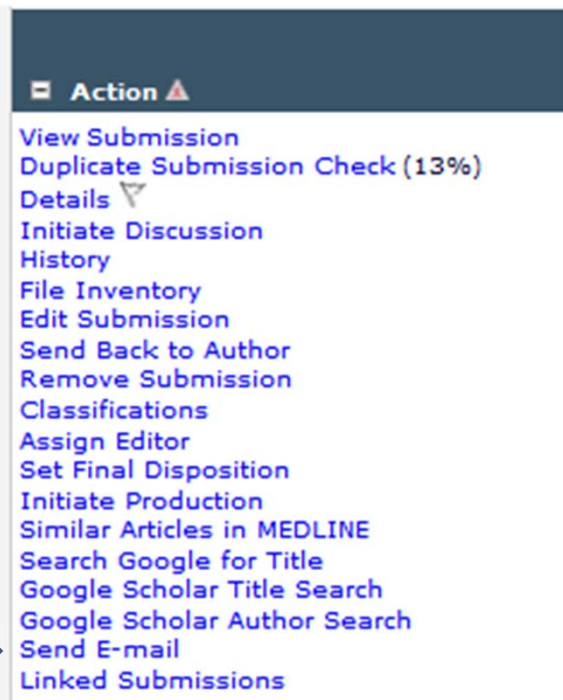| Letter Purpose:	Letter from Reviewer
Subject:	Question
Letter Family:	Please select a Letter Family ▼

Please select a Letter Family
Ad Hoc For Proposal
Ad Hoc From Author
Ad Hoc From Editor
Ad Hoc From Publisher
Ad Hoc From Reviewer

Continue

**PolicyManager :
Edit Letters** →

Application

o Send E-mail Link

o Keeps Communication Relevant to Submission

Action ⚠

View Submission
Duplicate Submission Check (13%)
Details 🔽
Initiate Discussion
History
File Inventory
Edit Submission
Send Back to Author
Remove Submission
Classifications
Assign Editor
Set Final Disposition
Initiate Production
Similar Articles in MEDLINE
Search Google for Title
Google Scholar Title Search
Google Scholar Author Search
Send E-mail
Linked Submissions

Send Batch E-Mail

- Editor Permission
- Used to Quickly Send Letters En Masse from EM

Configuration

o RoleManager Permission: Editors

o PolicyManager: Create Batch E-mail Letters

Application

o Can Filter Which Users Receive the E-mail

o Can Schedule Letter to Send at a Specific Time

Send Batch E-mail

Please choose the User Roles you want to receive the letter. You may select all, or one or more User Roles below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, hold down the 'Command' key while using the mouse to select the desired items.

User Role:
ALL
ALL AUTHOR ROLES
Author Role: Author
ALL REVIEWER ROLES

Select a letter to send to every user with the User Roles selected above.
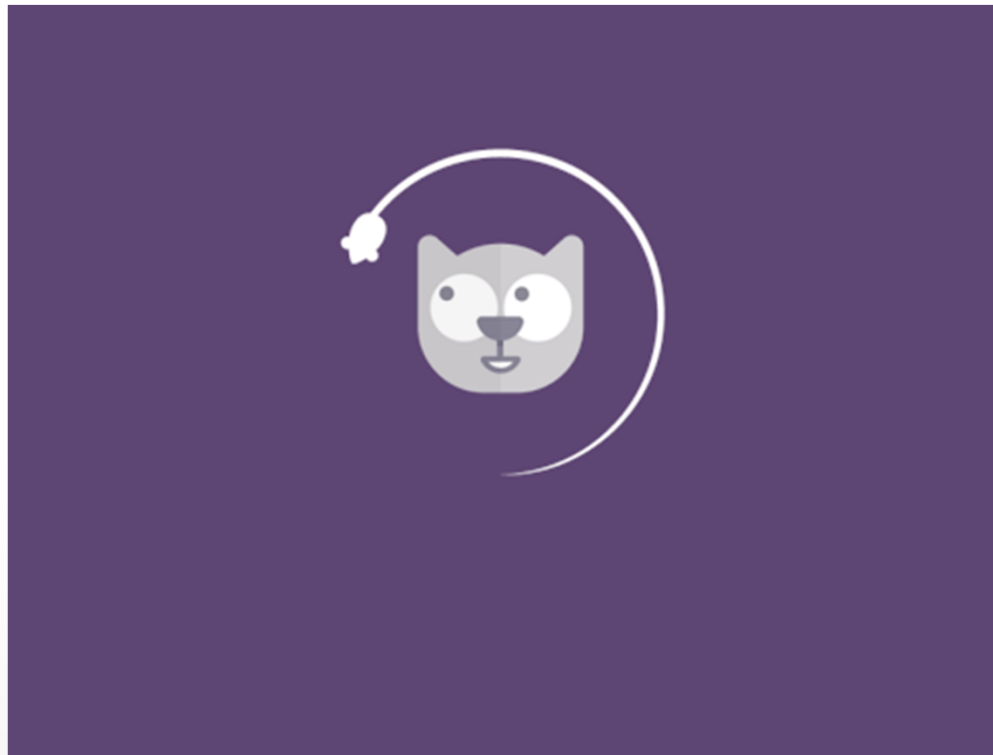
Please Choose a Letter

Set/View Delivery Time of E-mail

Cancel   Send E-mail Now

URL Submission Items

o Lets Authors Submit Links to Content Hosted on the Internet

o Perfect for Large File Types, Such as Video or Audio Files

Configuration

○ PolicyManager: "Edit Submission Items"

New Submission

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

Insert Special Character

Please Attach Files

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

[Video ▼]

Enter a **Description** and select a **Delivery Method**. To attach an External Resource, specify it and then click **Attach This Information**.

Description [Video]

Delivery Method   ○ Online Web System   ● URL/URI/External Resource

URL/URI/External Resource Location:

[http:// ▼] [www.youtube.com/watch?v=GPYzY9I78CI]   [Preview]

Please select http://, https:// or ftp://, then type in the remainder of the web address (e.g. www.targetsite.edu/datasets/dataset1) and click the 'Preview' button to ensure that the address you entered navigates to the correct location. Once you are satisfied with your entry, click the 'Attach This Information' button.

[Attach This Information]

The order in which the attached items appear in the list will be the order in which they appear in the PDF file that is produced. You can re-order the items and click the 'Update File Order' button to effect the change.

Check All   Clear All

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	Video ▼	Video	External Item		Jun 02 2015 01:24:08:231PM	Access Item	☐

[Update File Order]   [Remove]

Check All   Clear All

Application

File Inventory Manuscript Number: Unassigned
Terry K Badman (UNITED STATES): "video test" (View Submission)

Listed below are the files included in the current version of the latest Revision of the submission. (more...)

| Download Selections as Zip File | CrossCheck | | Close | Save and Close |

Duplicate Submission Check (20%)

■ Submission Files

Check All Clear All	Action	Item	Description	Item Family	File Name	Size	Modified	QC	Display On TF
	Access Item	Video	Video	Default	External Item		Jun 2 2015 1:24:07:613PM	N/A	
	Access Item	Video	Video	Default	External Item		Jun 2 2015 1:26:28:083PM	N/A	

| Upload Companion File |

| Download Selections as Zip File | | | Close | Save and Close |

Set Maximum Size of Uploaded File

o Restricts Authors from Uploading Large Files

o Keeps PDF File Sizes Manageable for Editors and Reviewers

Configuration

○ PolicyManager: Set Maximum Size of Uploaded File

Set Maximum Size of Uploaded File

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

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

Maximum File Size: 25 MB

Cancel   Submit
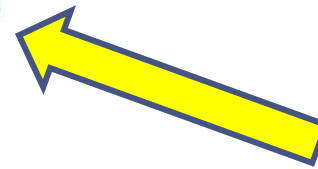
Application

o Warning Message Displayed to Author

o Item Will Not Load into Submission

The order in which the attached items appear in the list will be the order in which they appear in the PDF file that is produced. You can re-order the items and click the 'Update File Order' button to effect the change.

Warning: 1 or more items may require attention   Dismiss All   Check All   Clear All

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
		File not uploaded: exceeds maximum file size of 1 MB	moviesample.MOV	2.0 MB		Dismiss	☐

Update File Order   Remove

Warning: 1 or more items may require attention   Dismiss All   Check All   Clear All

Manuscript Submission Instructions

o Direct Authors During Submission Process

o Reduces User Error During Submission
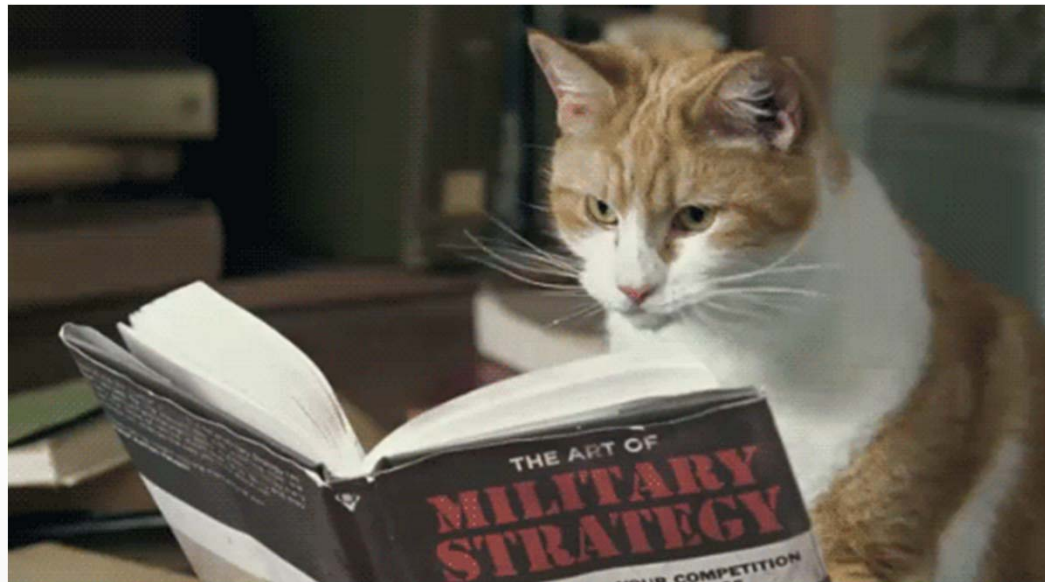
Configuration

o PolicyManager: Submission Policies

o Edit Manuscript Submission Instructions

Configuration

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

Application

Required **Items** are marked with a *.

You can upload all your files (cover letter, manuscript, figures, and supporting information) at once by producing and uploading a single compressed/ZIP file (using the Manuscript file item below). **The system will automatically unzip this file, ready for ordering the contents.**

The order in which the attached items appear in the list will be the order in which they appear in the PDF file that is produced. The order of the items may be changed using the "Order" boxes. The first item may be indicated by entering a 1, etc. Once your order numbering is complete, click "Update File Order" to save the changes.

If you are uploading a compressed/ZIP file as supporting information (e.g., ZIP, TAR, RAR) that should stay compressed, please use the 'Supporting Information - Compressed/ZIP File Archive' file item to ensure that the system does not automatically unzip it.

Any tracked changes present in the article file will be preserved in the PDF, so please ensure that any DOC source files are clean for initial submissions. For revised submissions, uploading a separate file with tracked changes is highly recommended.

Please consider including a striking image for your article. A striking image will be used to represent your article in places like the journal homepage or in search results.

Item	Author Agreement ▾

Enter a **Description** and then either choose files or drag and drop files.

Description	Author Agreement

Choose Files   Or Drag & Drop Files Here

Author Accept Checkbox

o Acts as a Hard Stop in the Submission Process

o Author Cannot Proceed if the Box Isn't Checked

Configuration

o PolicyManager

o Configure Author Accept Checkbox

Configure Author Accept Checkbox

Cancel   Submit

If you enable the Author Accept Checkbox feature for this publication, Authors will not be able to approve their submission and submit it to the editorial office without clicking the 'I Accept' checkbox on the Submissions Waiting for Author's Approval page. The Author Accept Checkbox feature can be used to require Authors to read and accept a publication's Ethics in Publishing Statement, Terms and Conditions, etc.

☑ Enable Author Accept Checkbox on Submissions Waiting for Author's Approval Page.

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 View Default Instructions Revert to Default Instructions
Column Header	Insert Special Character Please click the box below to agree to the publication terms and conditions outlined <u>here</u>.
Alert Text displayed if Author does not tick/select box before clicking Approve Submission	Insert Special Character You must click the box to proceed with your submission.

Application

Configure Login Page

o Allows for User Guidance and Site Branding

o Announcements, Fee Changes, Publication Overview, etc.

Configure Login Page

Configure Login Page

Configuration

o PolicyManager: Configure Login Page

Configuration

Area	Instructions
Forgot Access Credentials Text	**Insert Special Character** Enter your e-mail address in the box below. If an account exists with this e-mail address, your Username and Password will be e-mailed to you. **View Default Instructions** **Revert to Default Instructions**
Login Error Text	**Insert Special Character** The Username or Password you entered does not match any records in our database.

<u>Hint</u>: Is the 'Num Lock' display on your keyboard lit? If not, press the 'Num Lock' key before trying again.

Please re-enter your Username and Password below, or click 'Login Help'. **View Default Instructions**   **Revert to Default Instructions**

Login via ORCID

o Lets Users Login to EM with their ORCiD Credentials
o One Username/Password to Access Multiple EM Sites

WWW.ORCID.ORG

Login via ORCID

- o Lets Users Login to EM with their ORCiD Credentials
- o One Username/Password to Access Multiple EM Sites

Configuration

o PolicyManager: Configure Login Page

Configure Login Page

Cancel   Submit

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

☐ iD Login via ORCID

Application

- o User Needs to be Previously Registered with ORCiD
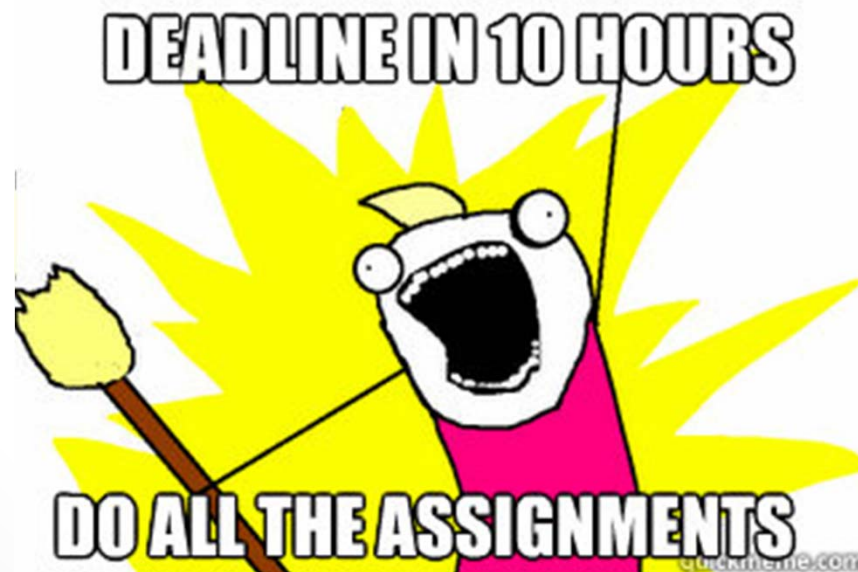- o Account Needs to be Authenticated in EM Site

ORCID   0000-0002-7993-0854   Delete

Alternate Contact Information

Electronic Calendar Due Date

- o iCal Attachment Files can be Included in Certain Emails
- o Populates Due Date in your Personal E-Calendar

Configuration

o PolicyManager Setting

o Configure Electronic Calendar Due Date Preferences

☐ Author Agrees to Submit Invited Paper *(calendar event recipient: Author)*

☐ Invited Paper Due Date Changed *(calendar event recipient: Author)*

☐ Author is Notified of a Revise Decision *(calendar event recipient: Author)*

☐ Revision Due Date is Changed *(calendar event recipient: Author)*

☐ Author Declines to Revise *(calendar event recipient: Author)*

☐ Declined Revision is Reinstated *(calendar event recipient: Author)*

☑ Reviewer Agrees to Review *(calendar event recipient: Reviewer)*

☐ Reviewer Assigned *(calendar event recipient: Reviewer)*

☑ Review Due Date Changed *(calendar event recipient: Reviewer)*

☐ Reviewer Uninvited/Unassigned *(calendar event recipient: Reviewer)*

☐ Review Assignment Terminated *(calendar event recipient: Reviewer)*

Application

o Attachment Included with Letter
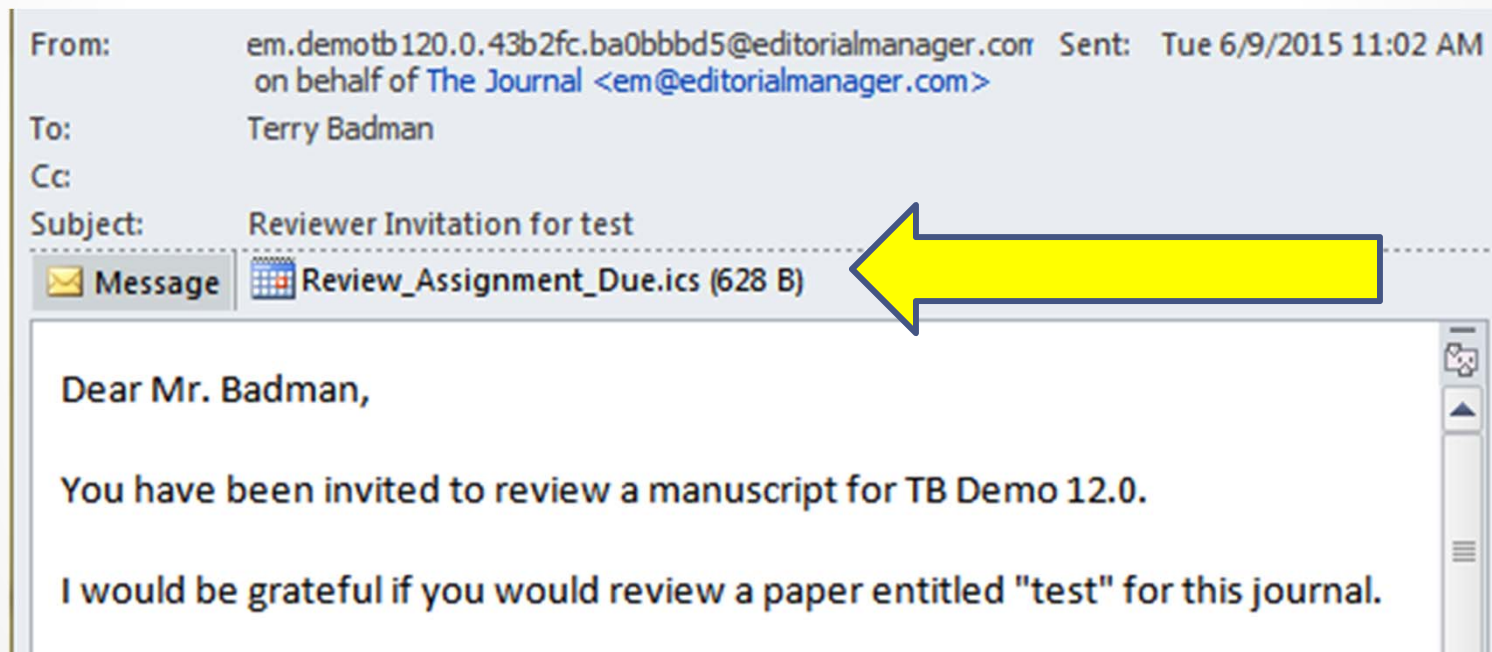
Automated Reminder Reports

o Available to Author and Reviewer Roles

o Keeps Users Updated on Assignments

Configuration

o Reports Section of Editor Main Menu

o Editor Permission

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

Reminder Type:

⦿ **No Response. Send Reminder:** Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly `5` days ago. declined the review invitation, and have not been un-invited or terminated.

○ **Reminder Before Due Date:** Send an automated reminder e-mail for reviews that are exactly `10` days before their due date. Reminders will be sen yet submitted their review.

○ **Reminder Past Due Date:** Send an automated reminder e-mail for reviews that are exactly `7` days past the due date. To send reminders for revie Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.

Reviewer Role: (All Reviewers) ▼

Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them. Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the Drag & Drop tool.

	Reminder Name	Reminder Type	Number of Days	Reminder Creator
🗑 ✏	Reminder Test	Reminder Before Due Date	10	Terry K Badman, MD

Article Type:

11.2 Webinar
Original Study 1
11.1 Open Peer Review Features
11.1 Transfer Features

Select All

Clear All

Section/Category:

Social Sciences Section
Basic Science Section
Clinincal Section
No Section Assigned

Select All

Clear All

Institution Name Normalization

o Utilizes Ringgold Database

o Standardizes Institution Information in EM

Configuration

o PolicyManager Setting

o Enable Institution Name Normalization

Enable Institution Name Normalization

When this feature is enabled, users will be presented with a list of affiliations to choose from wherever Institution and Department are entered in the system. This includes Registration, Proxy Registration, Update My Information, Alternate Contact Information, Search People - Update Information, and Add/Edit Authors (manuscript submission step).

By activating this option you acknowledge that you and your users will be using and contributing to a normalized and crowd-sourced institutional and department name database that belongs to Aries and its licensors.

☑ Enable Institution Name Normalization

[Cancel] [Submit]

Application
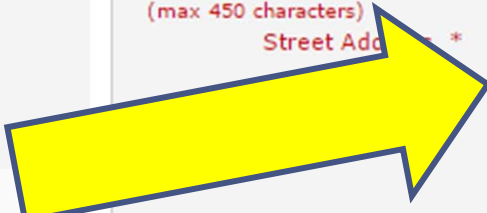
Re-Release Transmittal Form and Files (Editors)

o Editor RoleManager Permission

o Editors Can Quickly Re-Release Files to Production
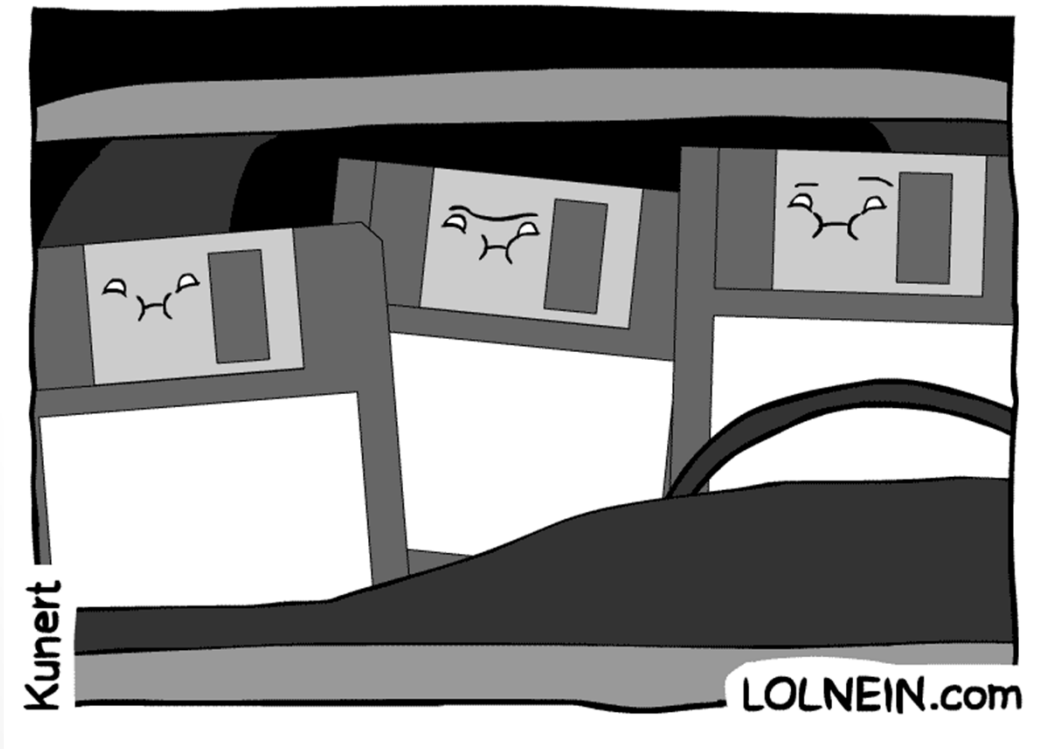
Configuration

o RoleManager: Editors

o Release Transmittal Form and Source Files to Production System after Final Disposition of Accept

⊟ **Transmittal Form**

☑ View Transmittal Form

☑ Edit Transmittal Form Fields

☑ Release Transmittal Form and Source Files to Production System

☑ Release Transmittal Form and Source Files to Production System after Final Disposition of Accept
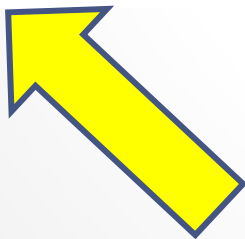
Application

o Can Re-Release Files Via the Transmittal Form Link
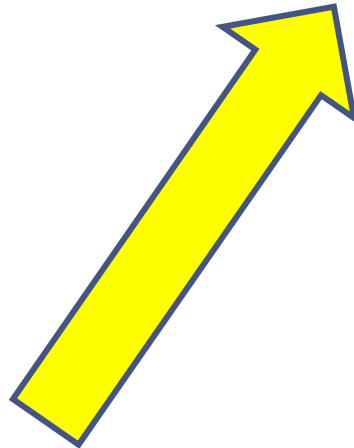
Set Notify Editor Preference

o Obsolete Link Can Now Be Hidden

o Ad-Hoc Emails are a Better Option
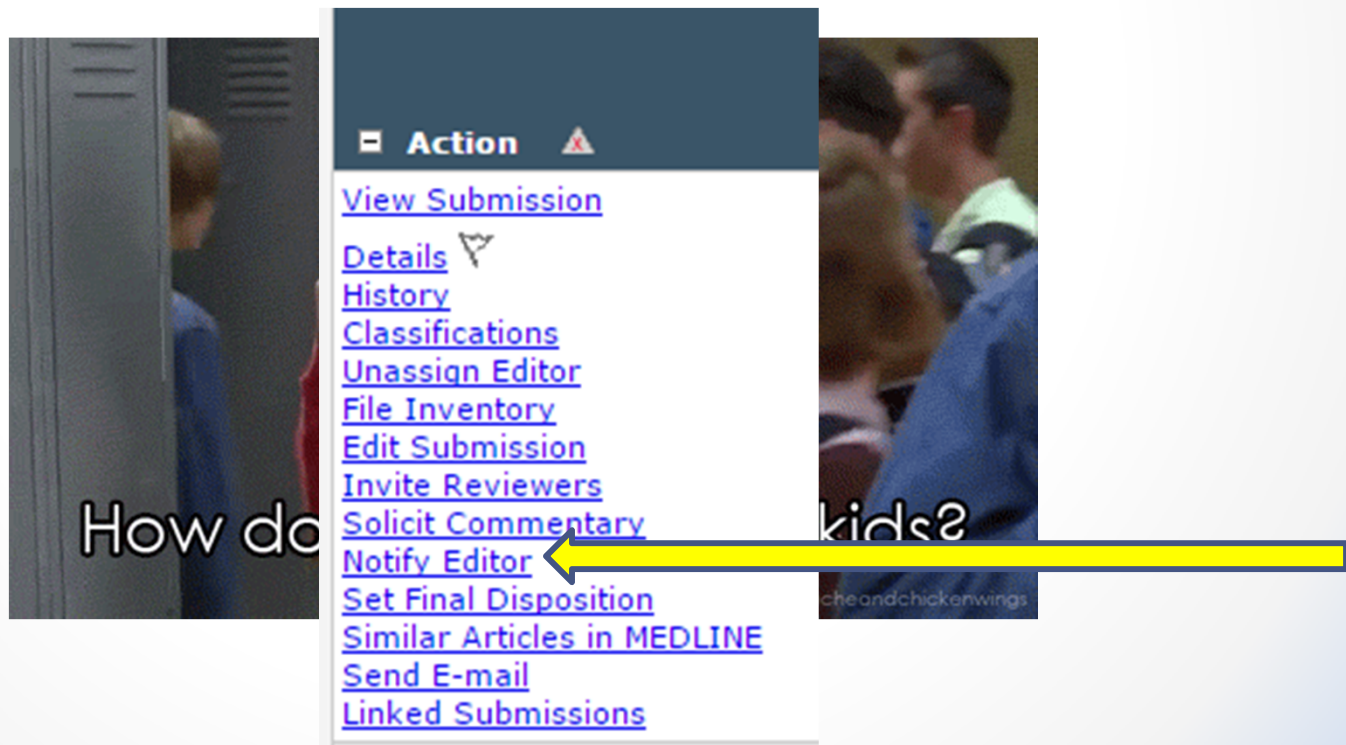
Configuration

o PolicyManager Setting

⊟ **E**

☑ Display 'Notify Editor' Link

ess

Cancel   Submit

View Completed Reviews Grid in Main Menu

o Quick Access to MS in Various Phases Review Process

Configuration

o Editor RoleManager Permission

o View Completed Reviews Grid in Main Menu

Initiate Rebuttal

- Optional Editor Permission
- Sends Withdrawn/Rejected Submission back to Author

Configuration

o Editor RoleManager Permission

o Initiate Rebuttal

Application

o Final Disposition REJECT and WITHDRAWN Folders

o Action Link

Edit Reviewer's Review

o Editor Permission
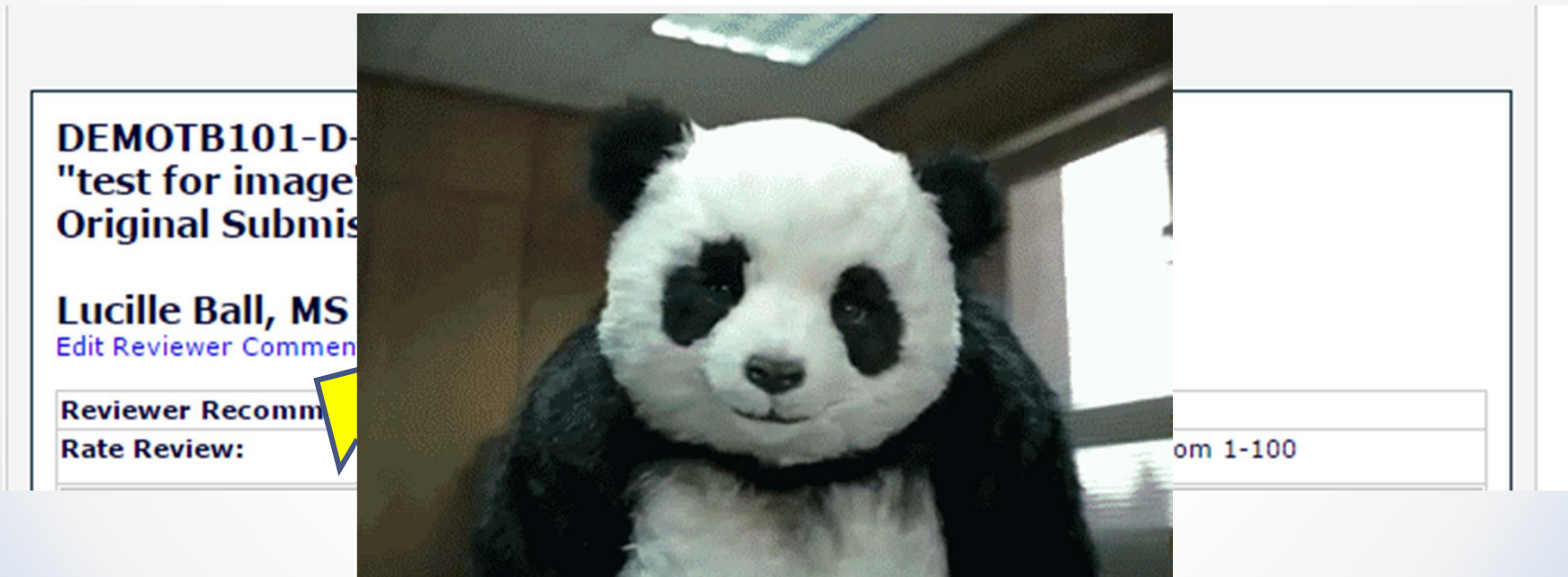o Edit Reviewer Comments and Ratings after Review is Submitted

Configuration

o Editor RoleManager Permission

o Re-Open Review and Edit Reviewer Comments

☑ Re-open Review

☑ Edit Reviewer Comments and Ratings after Review is Submitted
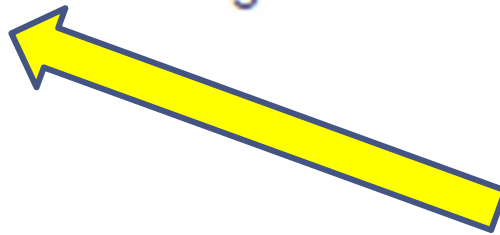
Application

o Accessible on the View Reviews and Comments Page

o Click into the Reviewer's Review

Auto Reviewer Role Assignment

o Automatically Assigns Reviewer Roles to New Registrants
o Makes Building a Bank of Reviewers Easier
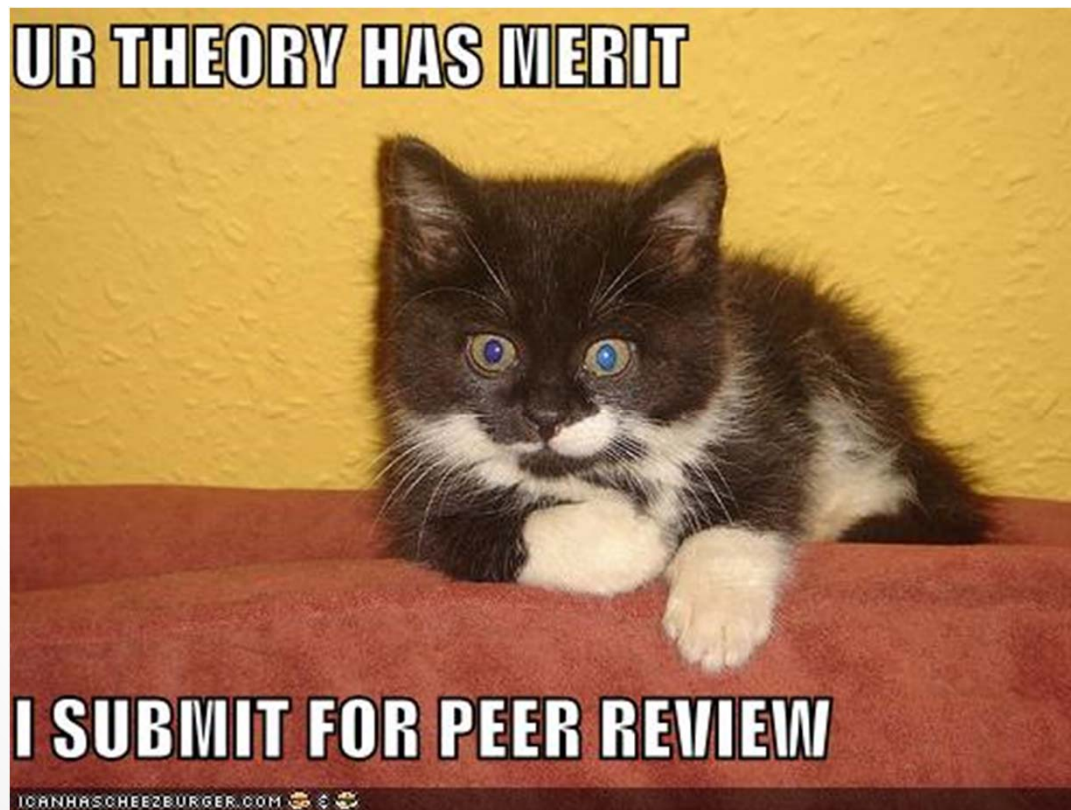
Configuration

o PolicyManager Setting

o Enable Automatic Reviewer Role Assignment

Expedited Reviewer Login

- Forces Reviewers to Update their Info at First Login
- Used When Editors Proxy Register Reviewers

Configuration

o PolicyManager Setting

o Configure Expedited Reviewer Login

☑ Enable Expedited Reviewer Login

☑ Title
✓ **Given/First Name**
☐ Middle Name
✓ **Family/Last Name**
☐ Degree
☐ Preferred Name
☐ Telephone Number
☐ Fax Number
☐ Secondary Telephone Number
☐ Secondary Telephone Number is for
✓ **E-mail**
✓ **Preferred Method of Contact**
☐ ISNI
☐ ORCID
☐ PubMed Author ID
☐ ResearcherID

Personal Classification Rankings

o Lets Users Rank their Personal Classification Proficiency
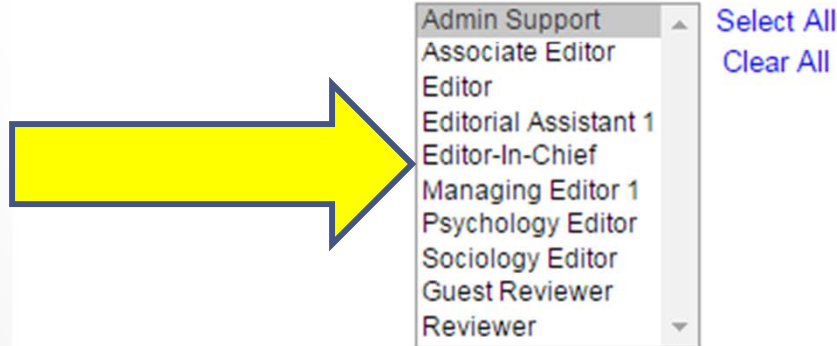
o PolicyManager Setting

Configuration

o PolicyManager Setting

o Configure Personal Classification Rankings

☑ Enable Personal Classification Rankings

tor Roles you want to require to Rank Personal Classifications when updating their people da
it is enforced when people are updating their people information. On a PC, multiple values i
e using the mouse to select the desired items in the selection box. On a Mac, the 'Comman

|	
Admin Support	Select All
Associate Editor	Clear All
Editor	
Editorial Assistant 1	
Editor-In-Chief	
Managing Editor 1	
Psychology Editor	
Sociology Editor	
Guest Reviewer	
Reviewer	

Application

Areas of Interest or Expertise

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

Personal Classifications
- 10.200: Class Structure   Medium
- 10.400: Contracts   Medium
- 20.500: Family Structure High

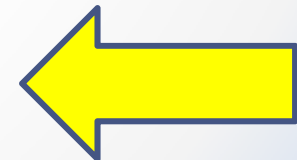[Select Personal Classifications]   [Rank Personal Classifications]
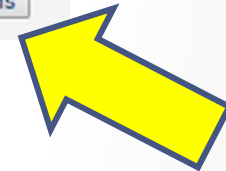
Rank Personal Classifications

Classification	Experience Ranking				Remove Classification
10.200: Class Structure	○ None Selected	○ Low	● Medium	○ High	☐
10.400: Contracts	○ None Selected	○ Low	● Medium	○ High	☐
20.500: Family Structure	○ None Selected	○ Low	○ Medium	● High	☐

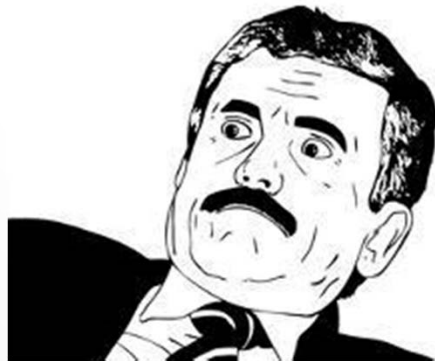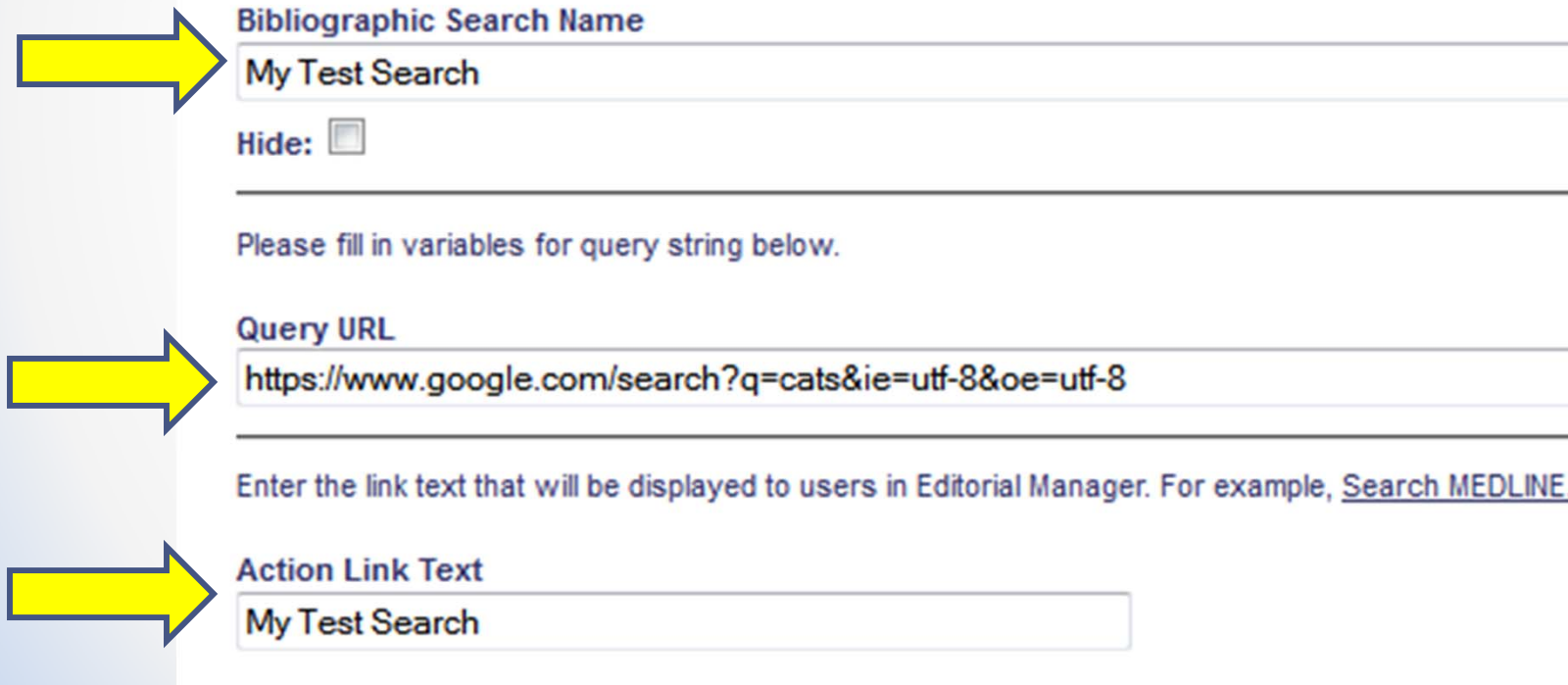[Cancel]   [Submit]

Third-Party Database Searching

o Used to Search for Content Online Outside of EM

o Customizable

WHAT IF.. ONE DAY GOOGLE WAS DELETED AND WE COULDN'T GOOGLE WHAT HAPPENED TO GOOGLE....

Configuration

o Aries Account Coordinator to Setup

o Utilizes Merge Fields Related to Submission

Bibliographic Search Name

My Test Search

Hide: ☐

Please fill in variables for query string below.

Query URL

https://www.google.com/search?q=cats&ie=utf-8&oe=utf-8

Enter the link text that will be displayed to users in Editorial Manager. For example, Search MEDLINE.

Action Link Text

My Test Search

Application

o New Action Link Displayed for Submissions
o New RoleManager Permission

Wrapping Up

Windows

The PowerPoint Presentation is now over. You can either-

* Press the power button and crash the computer because you think
  this is a real Blue Screen of Death.

* Press CTRL + ALT + DEL to open the task manager to
  end this PowerPoint Presentation the long way.

* Click anywhere or press any key to end the presentation because
  you have read this far, and have realized this was made just
  for laughs, and you don't need to freak out.

Do any of the following options listed above to continue.