Welcome to EMUG 2016

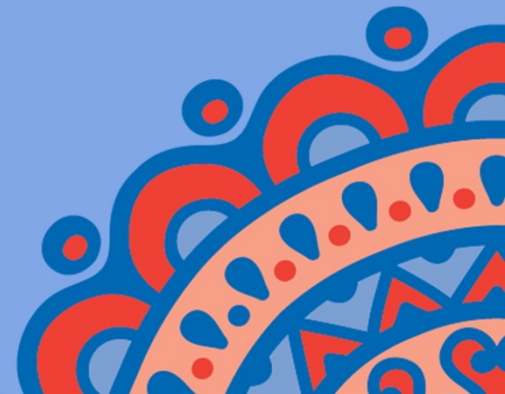em **Editorial Manager**® pm **ProduXion Manager**®

www.ariessys.com

Aries systems

Publish Faster. Publish Smarter.

Bootcamp

Melanie Cotterell, Client Services Manager
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Bootcamp

Configurations

System Administration

System Administration

User Registration

Self and Proxy Registration

Policy Manager

Registration Fields

Edit Registration Fields

Please select the fields you would like to require in the user Registration process. These fields will be designated with an asterisk (*) on the Registration, Update My Information, and Search People pages. Fields in bold text are required by Editorial Manager and cannot be made Optional by the publication.

Some system fields allow accompanying secondary fields. These secondary fields may be displayed on the registration pages to collect information in a different language or character set. The maximum length and type of the data entered in the secondary field is the same as the system field.

To make a personal identifier or secondary field required, select the first checkbox. To Hide the identifier or secondary field, select the 'Hidden' checkbox. The Required and Hidden checkboxes cannot both be selected. If an identifier or secondary field is Hidden, the field is no longer available for data entry, and any values previously entered into this field are not displayed on any page in the system.

Required	Hidden	System Field
☑		Title
✔		**Given/First Name**
☐		Middle Name
✔		**Family/Last Name**
☑		Degree
☐		Preferred Name
☐		Telephone Number

Registration Fields (cont.)

Policy Manager – Institution Name Normalization

⊟ **General Policies**

Set Manuscript Number Type

Set Manuscript Number Revision Suffix

Set Date Format

Set Time Zone Display Policy

Configure Unavailability Check and Instructions

Set ISO Country Standard

Configure General Due Date Preferences

Set Reviewer Preferences

Configure Electronic Calendar Due Date Preferences

Set Editor Deep Link Expiration

Set Enterprise Analytics Reporting Deep Link

Set View Reviewer Comments for Author Deep Link Expiration

Define Details Page Layouts

Set Update Information Deep Link Expiration

Create Customized Submission Flags

Create Customized People Flags

Edit Instructions for Archived Files

Edit Production Notes Instructions

Edit Alternate Contact Notes Instructions

Customize Author Main Menu Instructions

Configure Personal Classification Rankings

Customize Reviewer Selection Summary Instructions

Enable Institution Name Normalization

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

Role Manager

Role Manager - Proxy Registration Permission

⊞ Flag Icons

➡ ⊟ **Proxy Activities**

☑ Proxy Power:

☑ Proxy For Authors

☑ Proxy For Reviewers

☑ Proxy For Editors

☑ Proxy For Publishers

➡ ☑ Proxy Register New Users

○ E-mail Not Required (Warning Only) at Proxy Registration

➡ ◉ Require E-mail at Proxy Registration

⊞ **Administrative and Reporting Functions**

⊞ **Cross-Publication Login**

⊞ **Fees and Payments**

Policy Manager

Proxy Registration

Configure Proxy Registration

This page is used to configure the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. You may configure whether or not the 'Register User and Send Letter' button is displayed, which fields the Editor will be forced to complete and the instructions that are displayed on the page. When you have made your selections please click 'Submit'.

Display 'Register User and Send Letter' Button

Select the checkbox to display the 'Register User and Send Letter' button on the Proxy Registration page. When a checkbox is not selected, the 'Register User and Proceed' button is displayed and when the Editor selects the associated link, the option to send the letter associated with the 'Proxy Register New User' event in ActionManager is no longer available on the proxy registration page.

☑ Register and Select New Reviewer link from the Reviewer Selection Summary Page show the 'Register User and Send Letter' button

☑ Register and Invite New Author link from the Author Selection Summary Page show the 'Register User and Send Letter' button

Configure Fields for Proxy Registration

Please select the fields you would like to present and require during the Proxy Registration process. Required fields will be labelled in red and designated with an asterisk on the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. Optional fields will be labelled in blue. Fields in bold text below are required by Editorial Manager and cannot be made optional by the publication.

Required	Hidden	System Field
☑	☐	Title
✔		**Given/First Name**
☐	☐	Middle Name
✔		**Family/Last Name**

Proxy Registration (cont.)

Managing People Records

Merging, Inactivation - Maintaining a clean database!

Role Manager

RoleManager

Author Role

Reviewer Role

Editor Role ⬅

Publisher Role

RoleManager

Listed below are the roles that are currently defined for Editors. You may Add new roles or Remove or Edit existing roles. You can also create a new Editor Role by copying an existing role. When you Copy an Editor Role, all options in Editor RoleManager and related configuration options (e.g. Editor Forms, Manuscript Rating Questions, ActionManager letters, etc.) are carried over to the new role. Be sure to enter a unique Role Name and make sure all settings pertaining to the new role are correct, as the new role will be available for selection on pages where Editor Roles are displayed as soon as the Edit Role Definition page is submitted.

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
Editor (by assignment)	Remove Edit Copy

Role Manager - Editor

Edit Role Definition

Role Name:* [Managing Editor]

Maximum Role name is 40 characters.

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

Expand All   Collapse All

⊞ **New Submissions**
⊞ **Editor Assignment**
⊞ **Reviewer Invitations**
⊞ **Editor Decisions**
⊞ **Proposals/Commentaries**
⊞ **General Searching and Viewing**
⊞ **Edit Submission**
⊞ **Discussion Forums**
⊞ **Transmittal Form**
⊞ **Sending E-mail**
⊞ **Viewing and Editing People Data**
⊞ **Flag Icons**
⊞ **Proxy Activities**
⊞ **Administrative and Reporting Functions**

Merge/Inactivate Permissions

Submission Configurations

Article Types, Requirements and Co-Authors

Submission Policies

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 Request Authenticated ORCID iD Instructions
         Define PDF Cover Page Layouts
         Select Author's Reviewer Preferences
         Set Request Editor or Assign Editor Display Options
         Edit Manuscript Geographic Region of Origin
         Edit Manuscript Submission Instructions
         Configure Instructions for New Submission Redirect
         Configure Manuscript Services Icon
         Set Maximum Size of Uploaded File
         Set Other Author Parameters

Manuscript Submission Instructions

Edit Manuscript Submission Instructions

Edit the text to appear at each step of the manuscript submission processs and click "Update". Click "View Default Instructions" to see default instructions. Click "Revert to Default Instructions" to revert the manuscript to the default. HTML tags and special characters may be used.

If you have configured one or more steps to be 'Required' for an Article Type, the following text will display (as the first instruction on the page) when the Author reaches this step of the Manuscript Submission process: **[STEP] is Required for Submission.**

Cancel   Update

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.

Submission Policies

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 Request Authenticated ORCID iD Instructions
    Define PDF Cover Page Layouts
    Select Author's Reviewer Preferences
    Set Request Editor or Assign Editor Display Options
    Edit Manuscript Geographic Region of Origin
    Edit Manuscript Submission Instructions
    Configure Instructions for New Submission Redirect
    Configure Manuscript Services Icon
    Set Maximum Size of Uploaded File
    Set Other Author Parameters

Edit Article Types

Edit Article Types

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

Order	Article Type	Article Type Family	Invited	Editor/Publish Use Only			
1	Quick Submission	Regular			Remove	Edit	Copy
2	Original Study	Regular			Remove	Edit	Copy
3	Editorial	Regular			Remove	Edit	Copy
4	Review	Regular			Remove	Edit	Copy
5	Rapid Communication	Regular			Remove	Edit	Copy
6	Case Report	Regular			Remove	Edit	Copy
7	Letter to the Editor	Regular			Remove	Edit	Copy
8	Commentary	Regular	✔		Remove	Edit	Copy
9	Special Issue	Proposal			Remove	Edit	Copy

Submission Steps

Edit Article Type

Cancel Submit

Article Type: Original Study

Maximum Article Type name is 75 characters.

Article Type Parameters	New Submission	Revised Submission
Set Secondary "Full Title" Preferences:	Optional	Hidden
Set "Short Title" Preferences:	Optional	Optional
Set Secondary "Short Title" Preferences:	Optional	Hidden
Set "Funding Information" Preferences:	Optional	Optional
Set "Select Section/Category" Preferences:	Optional	Optional
Set "Submit Abstract" Preferences:	Required	Required
Set Secondary "Submit Abstract" Preferences:	Optional	Hidden
Set "Enter Keywords" Preferences:	Optional	Optional
Set "Enter Secondary Keywords" Preferences:	Hidden	Hidden
Set "Select Classifications" Preferences:	Optional	Optional

Set "Additional Information" Preferences:

Designate Submission Questionnaire:	Bootcamp	Hidden
Designate Author Questionnaire:	Coauthors	Hidden

Submission Step Limits

Edit Article Type

Cancel   Submit

Article Type: Original Study

Maximum Article Type name is 75 characters.

Field Size Limitations - *Leave blank for no limit on these fields.*

Limit the *Full Title* to: 2   ● Words ○ Characters

Limit the *Short Title* to: 20   ● Words ○ Characters

Limit the *Abstract* to: 300   ● Words ○ Characters

Limit the *Comments* to: [   ]   ● Words ○ Characters

Maximum Number of Authors: [   ]

Maximum Number of Keywords: 3

Number of Classifications: [   ] Minimum   *A Minimum applies only when the 'Select Classifications' preference is set to "Required".*

2 Maximum   *The Maximum applies only when the 'Select Classifications' preference is set to "Optional" or "Required".*

Co-Authors/Other Authors

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 Request Authenticated ORCID iD Instructions
    Define PDF Cover Page Layouts
    Select Author's Reviewer Preferences
    Set Request Editor or Assign Editor Display Options
    Edit Manuscript Geographic Region of Origin
    Edit Manuscript Submission Instructions
    Configure Instructions for New Submission Redirect
    Configure Manuscript Services Icon
    Set Maximum Size of Uploaded File
    Set Other Author Parameters

Other Author Data

Set Other Author Parameters

You may request additional information about Other Authors entered on the **Add/Edit/Remove Authors** manuscript submission step. Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'. If your Publication chooses to require Other Author verification or registration for any Article Type, you may want to select E-mail or other address fields as required for all Other Authors so that you will have a means of contacting Other Authors.

Deceased Status, Equal Contribution Status and Post-Publication Corresponding Author can be set as 'Hidden' or 'Display'. If these fields are set to display, the Add/Edit/Remove Authors submission step will display a checkbox so that an Author(s) can be designated as deceased or an equal contributor on the paper. The Post-Publication Corresponding Author designation does not impact the editorial workflow in any way; it is a designation that is indicated on the published article.

The %ALL_AUTHORS_WITH_SELECTED_METADATA% merge field pulls in your choice of metadata elements for all Authors (including the Corresponding Author) to use in letters. To specify metadata for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all elements you want to include.

Cancel   Submit

Other Author Parameters   **Include in Merge Field?**

Set "Title" Text Entry Box Preference: Required   ☐
Given/First Name   Required   ☐
Set "Secondary Given/First Name" Text Entry Box Preference: Hidden   ☐
Set "Middle Name" Text Entry Box Preference: Optional   ☐
Family/Last Name   Required   ☐
Set "Secondary Family/Last Name" Text Entry Box Preference: Hidden   ☐
Set "Academic Degree(s)" Text Entry Box Preference: Optional   ☐

Submission Policies

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 Request Authenticated ORCID iD Instructions
   Define PDF Cover Page Layouts
   Select Author's Reviewer Preferences
   Set Request Editor or Assign Editor Display Options
   Edit Manuscript Geographic Region of Origin
   Edit Manuscript Submission Instructions
   Configure Instructions for New Submission Redirect
   Configure Manuscript Services Icon
   Set Maximum Size of Uploaded File
   Set Other Author Parameters

Co-Author Options

Section/Categories

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 Request Authenticated ORCID iD Instructions
    Define PDF Cover Page Layouts
    Select Author's Reviewer Preferences
    Set Request Editor or Assign Editor Display Options
    Edit Manuscript Geographic Region of Origin
    Edit Manuscript Submission Instructions
    Configure Instructions for New Submission Redirect
    Configure Manuscript Services Icon
    Set Maximum Size of Uploaded File
    Set Other Author Parameters

Section Category

Edit Sections/Categories

Listed below are the Sections/Categories available. You may Add, Edit, or Remove Sections/Categories. Sections/Categories may be hidden by clicking the "Edit" link and selecting the "Hide" checkbox on that page. Any Sections/Categories which appear grayed out have been hidden.

If manuscripts are automatically assigned by the 'Submissions where Author has selected a Section/Category' method (as configured on the 'Set Editor Assignment Options' page), a Responsible Editor must be selected from the drop-down menu.

Section/Category Name	Responsible Editor		
Invited Editor Section	Super User, P	Remove	Edit
Clinincal Section		Remove	Edit
Epidemiology Section		Remove	Edit
Conference	Mike Di Natale, n/a	Remove	Edit

New Section or Category:

Maximum Section/Category name is 100 characters

Responsible Editor (required if Editor Assignment is configured as 'Submissions where Author has selected a Section/Category'):

None

Add

Direct to Editor functionality - more details:
http://www.editorialmanager.com/robohelp/12.2/Editorial_Manager_Help/Autonomous_Editor_Direct_to_Editor.htm

Classifications

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 Request Authenticated ORCID iD Instructions
Define PDF Cover Page Layouts
Select Author's Reviewer Preferences
Set Request Editor or Assign Editor Display Options
Edit Manuscript Geographic Region of Origin
Edit Manuscript Submission Instructions
Configure Instructions for New Submission Redirect
Configure Manuscript Services Icon
Set Maximum Size of Uploaded File
Set Other Author Parameters

Edit Classifications

Questionnaire Policies

PolicyManager Main Menu

Expand All   Collapse All

⊞ **Registration and Login Policies**

⊞ **Status Policies**

⊞ **Submission Policies**

⊟ **Questionnaire Policies**

Create Custom Questions

Create Questionnaires

Edit Co-Author Questionnaire Instructions

Create Custom Questions

Create Custom Questions

Listed below are the customized questions/fields which may be displayed as part of a Questionnaire. Each question may also be configured to display in additional locations (Transmittal Form, PDF Cover Page, Manuscript Details).

A question may be removed unless it has been used. If a question has been used but is now obsolete, it may be inactivated by clicking the Hide link. If the link does not appear for a question, then it is still included on a questionnaire and must first be removed from the questionnaire before it can be hidden.

Questions preceded by a "§" symbol are multi-part questions; note that the follow-up questions listed may only be asked if the user chooses a certain response to the original question.

Actions	Description
Add Question	
Edit	The journal can create custom question?
Edit	Custom questions and responses can also appear on the Transmittal Form?
Edit	Has this paper been submitted to any other journal?
Edit	NEW SUBMISSION QUESTION
Edit	REVISED SUBMISSION QUESTION
Edit	List Question, after updating list
Edit	Please confirm you have approval from all Co-Authors to submit this manuscript.
Edit	What is the total word count of your manuscript?
Edit	Have you followed the template and instructions for authors for this article type?
Remove Edit	LEGACY Author Contributions: performed the experiments Please enter the initials of each author who performed the experiments for this manuscript separated by a space. * typeset
Edit	Please enter **all** conflicts of interest in the space provided. *Please note that this information will be made available to the reviewers at the discretion of the editors.*
	§ Do you have a conflict of interest to declare?
Edit	§ Are you submitting this paper to other journals?

Question Options

Add Custom Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented as part of submission, author verification or production task completion.

Cancel   Save and Close   Save and Add Another Question   Open Special Character Palette

Question text:

Instructions for Author Response:

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: Text ▾   **Maximum Field Length (1-200):**

Text
Date
Integer
Decimal
Notes
List

Question Options (cont.)

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: [List ▾]   **List Type:** [Radio Buttons (Allows for a single value selection; requires a default value) ▾]

When configuring the default value, please note that only the value "Please select a response" will force the author to select another answer. Any other value will count as a valid response.

Display Order	Default Value	Value	Description
	◉	Please select a response	
1	○	Yes	
2	○	No	
3	○	[ ]	[ ] Save Item

[Update]

If user selects:

◉ Please select a response
○ Yes
○ No

[Add Follow-up Question]

Follow Up Questions

Follow Up Questions (cont.)

□ Follow-up Question 1.1

If user selected "Other" in response to *"Which sections covered today were of most value?"*

Please tell us what you liked best about Bootcamp.

Character Count: 0

Limit 200 characters

Follow Up Questions (cont.)

⊞ **Follow-up Question 2**

If user selected "No" in response to *"Did you learn anything new in Bootcamp?"*

Please tell us what you would have liked us to cover. Your input will help us improve Bootcamp next year.

Character Count: 0

Limit 20000 characters

Question Options (cont.)

Create Questionnaires

Create Questionnaire

Create a new Questionnaire by clicking the 'Add' button below.
Questionnaires displayed here may be configured for use with Article Types or Production Tasks.

10.0 Feature Presentation Part1	Remove	Edit
10.0 Feature Webinar	Remove	Edit
5/9 Webinar	Remove	Edit
9.0 New Feature Questionnaire - view on PDF	Remove	Edit
Author Questionnaire	Remove	Edit
Bootcamp		Edit
Coauthor Questionnaire	Remove	Edit
Coauthors	Remove	Edit
EMUG	Remove	Edit
Name Questionnaire	Remove	Edit
New Submission test	Remove	Edit
Original Study Questionnaire	Remove	Edit
Original Study Questionnaire	Remove	Edit
Revised Submission Test	Remove	Edit
Sample Questionnaire	Remove	Edit
Submission Questionnaire	Remove	Edit
TEST FOR 10.0	Remove	Edit
Webinar 5.10	Remove	Edit
wendys questionnaire	Remove	Edit
WM new test	Remove	Edit

Add

Create Questionnaires (cont.)

Configure Questionnaire

Enter a name for the Questionnaire in the 'Questionnaire Name' field. Custom Questions may be added to the Questionnaire by clicking the 'Add Custom Questions' button, selecting Custom Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save the Questionnaire and return to the Create Questionnaire page.

The %AUTHOR_QUESTIONNAIRE_SUBSET% merge field pulls in all of the selected Questions and Responses for all Authors on the submission (including the Corresponding Author). To specify questions/responses for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all questions you want to include. Note the %AUTHOR_QUESTIONNAIRE% merge field continues to pull in all questions and responses for the questionnaire.

Questionnaire Name: Bootcamp   **(50 characters maximum)**

☐ **Hide**   When you **Hide** a Questionnaire, it will not be available for use.

Question Display Order:

Order	Question	Required	Include in Merge Field	Actions
1	§ Did you learn anything new in Bootcamp?	☑	☐	Remove

Update Item Order

Add Custom Questions

Cancel   Save

Apply Questionnaire to Article Types

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 Request Authenticated ORCID iD Instructions

    Define PDF Cover Page Layouts

    Select Author's Reviewer Preferences

    Set Request Editor or Assign Editor Display Options

    Edit Manuscript Geographic Region of Origin

    Edit Manuscript Submission Instructions

    Configure Instructions for New Submission Redirect

    Configure Manuscript Services Icon

    Set Maximum Size of Uploaded File

    Set Other Author Parameters

Apply Questionnaire to Article Types

Suggest/Oppose Reviewers – minimum in Edit Article Types

Suggest/Oppose Reviewers

Suggest/Oppose Reviewers

Select Author's Reviewer Preferences

You may ask Authors to suggest preferred Reviewers when submitting a manuscript (Suggest Reviewers). You may also ask Authors to indicate Reviewers who should not review the submission due to conflict of interest or bias (Oppose Reviewers). All of the fields below are displayed for the Suggest Reviewer and Oppose Reviewer submission steps. However, you can specify which fields are required for Authors to fill in, by checking the boxes below. First and Last Name are always required when suggesting or opposing Reviewers. You must then go to the 'Edit Article Type' page and set the step(s) to 'Display' for the appropriate Article Types. You may also specify a minimum number of suggested Reviewers on the Edit Article Type page.

Suggest Reviewers	Oppose Reviewers
✓ Given/First Name	✓ Given/First Name
☐ Middle Name	☐ Middle Name
✓ Family/Last Name	✓ Family/Last Name
☐ Degree	☐ Degree
☐ Position	☐ Position
☐ Department	☐ Department
☐ Institution	☐ Institution
☑ E-mail	☑ E-mail
☐ Reason	☑ Reason

Cancel   Submit

Region of Origin

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**

Set Manuscript Number Type
Set Manuscript Number Revision Suffix
Set Date Format
Set Time Zone Display Policy
Configure Unavailability Check and Instructions
Set ISO Country Standard
Configure General Due Date Preferences
Set Reviewer Preferences

Region of Origin

Set ISO Country Standard

Select an ISO 3166-1 Newsletter version from the drop-down menu.

Choose ISO Standard: [ISO 3166-1 Newsletter VI-14 ∨]

View ISO 3166-1 Newsletter VI-14   Download ISO 3166-1 Newsletter VI-14
View ISO 3166-1 Newsletter VI-8   Download ISO 3166-1 Newsletter VI-8
View ISO 3166-1 Newsletter VI-7   Download ISO 3166-1 Newsletter VI-7
View ISO 3166-1 Newsletter VI-6   Download ISO 3166-1 Newsletter VI-6
View ISO 3166-1 Newsletter V-12   Download ISO 3166-1 Newsletter V-12
View ISO 3166-1 Newsletter V-11   Download ISO 3166-1 Newsletter V-11
View ISO 3166-1 Newsletter V-10   Download ISO 3166-1 Newsletter V-10
View ISO 3166-1 Newsletter V-9   Download ISO 3166-1 Newsletter V-9
View ISO 3166-1 Newsletter V-8   Download ISO 3166-1 Newsletter V-8
View ISO 3166-1 Newsletter V-7   Download ISO 3166-1 Newsletter V-7
View ISO 3166-1 Newsletter V-6   Download ISO 3166-1 Newsletter V-6
View ISO 3166-1 Newsletter V-5   Download ISO 3166-1 Newsletter V-5
View ISO 3166-1 Newsletter V-4   Download ISO 3166-1 Newsletter V-4
View ISO 3166-1 Newsletter V-3   Download ISO 3166-1 Newsletter V-3
View ISO 3166-1 Newsletter V-2   Download ISO 3166-1 Newsletter V-2
View ISO 3166-1 Newsletter V-1   Download ISO 3166-1 Newsletter V-1

This option will alphabetize, without exception, your elected ISO 3166-1 Newsletter country list which is used throughout Editorial Manager.

☐ Display Country List Alphabetically

[Cancel]   [Submit]

Edit Submission Items

Submission Items

Edit Master Submission Item Types

Listed below are the Item Types that may be uploaded as components of a submission. The order of items the user will see in the Item Type drop-down list on the 'Attach Files' page can be changed by entering the desired numeric order in the boxes below and clicking the "Update Item Order" button.

To force the items into this order during the manuscript submission process, select the checkbox 'Impose this order on uploaded files'. The Author will have the opportunity to re-order items of the same Item Type.

☐ Impose this order on uploaded files.
  Click the 'Save Changes' button to save this setting

Required Items will be shown first in the drop-down list if the checkbox 'Show required Submission Items for each Article Type first in the drop-down list' is checked. If imposed ordering is enabled, then the required items will be displayed first in the drop-down list on the Attach Files page, but the files will be ordered according to the order defined below.

☑ Show required Items for each Article Type first in the drop-down list.
  Click the 'Save Changes' button to save this setting

[Save Changes]

Order	Item Type	Item Family	Artwork QC	Reference Checking	Actions	
1	Author Agreement	Default				Edit
2	AVI	Supplemental			Remove	Edit
3	AVI (companion file)	Supplemental				Edit
4	Copyright form	Document			Remove	Edit
5	Copyright form (Companion)	Document				Edit
6	Correl Draw File	Supplemental			Remove	Edit
7	Editor comments	Document				Edit
8	Figure	Figure	✔			Edit
9	Manuscript	Document		✔		Edit
10	Table	Table				Edit

Insert Special Character

New Item Type: [   ]
Maximum 256 characters

New Item Type Family [Default ▾]

[Add New Item Type]

Submission Items – PDF Handling

Submission Items – Edit Article Types

Policy Manager - "I Accept" Checkbox and Author PDF Approval Page

⊟ **Submission Policies**

Edit Article Types
Edit Submission Items
Configure Color Codes for Companion Files
Edit Sections/Categories
Set Classifications Display Policy
Edit Classifications
Edit Request Authenticated ORCID iD Instructions
Define PDF Cover Page Layouts
Select Author's Reviewer Preferences
Set Request Editor or Assign Editor Display Options
Edit Manuscript Geographic Region of Origin
Edit Manuscript Submission Instructions
Configure Instructions for New Submission Redirect
Configure Manuscript Services Icon
Set Maximum Size of Uploaded File
Set Other Author Parameters
Set Revision File Selection Option
Configure Duplicate Submission Check
Configure Technical Check
Configure Similarity Check
Configure Office 2007 and Higher Support
Configure Author Accept Checkbox
Configure Publication Charges Processing

"I Accept" Checkbox and Author PDF Approval Page

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 View Default Instructions Revert to Default Instructions
Column Header	Insert Special Character Please agree that you have followed the instructions for Authors
Alert Text displayed if Author does not tick/select box before clicking Approve Submission	Insert Special Character Please check the box

Technical Check

Processing New Submissions and Send Back to Author

Configure Technical Check

☐ **Submission Policies**

Edit Article Types

Edit Submission Items

Configure Color Codes for Companion Files

Edit Sections/Categories

Set Classifications Display Policy

Edit Classifications

Edit Request Authenticated ORCID iD Instructions

Define PDF Cover Page Layouts

Select Author's Reviewer Preferences

Set Request Editor or Assign Editor Display Options

Edit Manuscript Geographic Region of Origin

Edit Manuscript Submission Instructions

Configure Instructions for New Submission Redirect

Configure Manuscript Services Icon

Set Maximum Size of Uploaded File

Set Other Author Parameters

Set Revision File Selection Option

Configure Duplicate Submission Check

Configure Technical Check

Configure Similarity Check

Configure Technical Check

Configure Technical Check

When the Technical Check is enabled, new submissions are sent to a 'New Submissions' folder instead of directly to the 'New Submissions Requiring Assignment' folder. Revised submissions are sent to a 'Revised Submissions' folder instead of directly to the 'Revised Submissions Requiring Assignment' folder. Note: this feature cannot be used for submissions that go directly to an Editor (Direct-to-Editor).

The Instructions box allows you to add instructions that will appear at the time the Technical Check is performed. HTML tags may be used.

☑ Enable Technical Check

Cancel   Preview   Submit

Instructions: Insert Special Character   Open in New Window

```
<B><FONT COLOR=RED>ORIGINAL STUDY</B> </FONT>
<LI> maximum word count 6000</li>
<li> maximum color figures 5</li>

<FONT COLOR=RED><b> LETTER TO THE EDITOR</B></FONT>
<LI> maximum word count 500</li>
```

Cancel   Preview   Submit

Role Manager - Editor

Edit Role Definition

Role Name:*   Managing Editor

Maximum Role name is 40 characters.

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

Expand All   Collapse All

⊟ **New Submissions**

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

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

☑ 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

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**
⊞ **Reviewer and Editor Form Policies**
⊟ **E-mail and Letter Policies**

Edit Letters
Define Custom Merge Fields
Set "Email From" Address
Set Non-Email "Preferred Method Of Contact" Correspondence Email Address
Configure Email Import
Set Notify Author Blinding Policy
Set Notify Editor Preference

Add New Technical Check Letter

Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title. (more...)

Back to PolicyManager

| Add New Letter | Save Changes | Edit Image Files for Letters |

Letter Purpose ▲▼	Letter Family *Group by:* ▲▼²	ActionManager Roles and Events	Letter Format		All Formats
			Text	Rich Text (HTML)	
X Reject and Transfer	Decision		◉ Edit	○ Edit	Remove | Hide
X Author Reminder Report Test Letter	Author Reminder		◉ Edit	○ Edit	Remove | Hide
Welcome Letter - Go Live	Batch E-mail		◉ Edit	○ Edit	Remove | Hide
Welcome	General	Author - New User Registers	◉ Edit	○ Edit	Remove | Hide
Webinar - adding attachments to ad hoc emails	Ad Hoc From Editor		◉ Edit	○ Edit	Remove | Hide
Transfer Notification to Author	General	Author - Submission Transferred to Publication Author - Final Disposition - Transfer	◉ Edit	○ Edit	Remove | Hide
Transfer Letter	Transfer Letter		◉ Edit	○ Edit	
test	General		◉ Edit	○ Edit	Remove | Hide
Terminate Assignment	Terminate Assignments		◉ Edit	○ Edit	Remove | Hide
Send Username and Password	General	Author - Forgot Username or Password	◉ Edit	○ Edit	Remove | Hide
Reviewer Uninvited Notice	General	Test Reviewer - Un-invite Reviewers Before Agreeing to Review Test Reviewer - Un-assign Reviewers After Agreeing to Review	◉ Edit	○ Edit	Remove | Hide

Action Manager – Set Technical Check Letter for Author Role

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
Reviewer Letters
reviewer 2 Letters
Managing Editor Letters
Editor Letters
Editorial Assistant Letters
Administrator Letters
Senior Editor Letters
AE or Reviewing Editor Letters
Eic author blinding role Letters
Publisher Letters
Publisher with prod det Letters

Send Back To Author Event

Editor Edits Submission

Event	Author Letters
Incomplete Submission by Editor	NONE
Editor PDF Build Error	NONE
Building PDF for Editor	NONE
Original PDF Built by Editor	NONE
Revised PDF Built by Editor	NONE
Submission Sent Back to Author	Author Notice - Technical Check failure
Editor Approve Edited Submission	NONE

Action Links

Duplicate, Details, History and Help!

Configure Duplicate Submission Check

⊟ **Submission Policies**

Edit Article Types

~~Edit Submission Items~~

Configure Color Codes for Companion Files

Edit Sections/Categories

Set Classifications Display Policy

Edit Classifications

Edit Request Authenticated ORCID iD Instructions

Define PDF Cover Page Layouts

Select Author's Reviewer Preferences

Set Request Editor or Assign Editor Display Options

Edit Manuscript Geographic Region of Origin

Edit Manuscript Submission Instructions

Configure Instructions for New Submission Redirect

Configure Manuscript Services Icon

Set Maximum Size of Uploaded File

Set Other Author Parameters

~~Set Revision File Selection Option~~

Configure Duplicate Submission Check

Configure Technical Check

Configure Similarity Check

Duplicate Submission Check

Edit Article Type

Cancel   Submit

Article Type: Original Study

Maximum Article Type name is 75 characters.

Warning: changing the Article Type name will apply the name change to all submissions of t...

Family: Regular   **Editor Use Only:** ☐

☐ **Hide**   When you **Hide** an Article Type, the Article Type will be deactivated (not available for new manu...

☐ Allow file uploads from arXiv.org server

Similarity Check:
- ☑ Send Reviewer PDF on Initial Submission
- ☐ Send Reviewer PDF on First Revision
- ☐ Send Reviewer PDF on Final Disposition to Accept

Duplicate Submission Check: ☑ Check for duplicate submissions to Editorial Manager

---

Configure Duplicate Submission Check

- If the Author has submitted a new manuscript within the number of days set below, a 🅓 symbol will appear next to the Author's name in the Editor folders New Submissions, New Submissions Requiring Assignment, Direct-to-Editor New Submissions and New Assignments. The Editor can then click the Author's name to see information about prior submissions.
- If a manuscript with a similar title, list of authors, or abstract has been previously submitted, a 'Duplicate Submission Check Results' link will be displayed to users with permission. Clicking the link will display a list of similar submissions.
  - You may select a minimum score used to select which potential duplicate submissions are displayed on the 'Duplicate Submission Check Results' page.
  - You may highlight scores that exceed a configured threshold.
  - An overall 'EM Duplicate Score' will be calculated, based on a weighted average of the Article Title (40%), the list of Authors (30%), and the Abstract (30%)

Alert me when:

☑ The same Corresponding Author has submitted a paper in the past [365] days

☑ A similar paper has been previously submitted.

- Only display potential duplicate submissions that have an EM Duplicate Score that is [1] % or more
- Highlight the EM Duplicate Score when it is [50] % or more

Page	Instructions
Duplicate Submission Check Results	Insert Special Character
	The results of a comparison between this submission and previously submitted...

Details Page Layouts – Role Manager/Policy Manager

General Searching and Viewing

Use Editorial Details Layout | Default Editorial |

☑ Search All Manuscripts

General Policies

Set Manuscript Number Type

Set Manuscript Number Revision Suffix

Set Date Format

Set Time Zone Display Policy

Configure Unavailability Check and Instructions

Set ISO Country Standard

Configure General Due Date Preferences

Set Reviewer Preferences

Configure Electronic Calendar Due Date Preferences

Set Editor Deep Link Expiration

Set Enterprise Analytics Reporting Deep Link

Set View Reviewer Comments for Author Deep Link Expiration

Define Details Page Layouts

Set Update Information Deep Link Expiration

Create Customized Submission Flags

Default Layouts

Default Editorial	Copy
Default Proposals	Copy
Default Production	Copy

User-Defined Layouts

Alternate Editorial Details Page	Remove	Edit	Copy
Copy of Default Editorial	Remove	Edit	Copy
Copy of Default Production	Remove	Edit	Copy

Details Page

Page Title
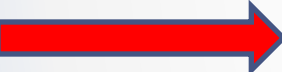
- ● Use standard identifiers (Manuscript Number and Title)
- ○ Use identifiers selected in "Configure Identifiers Displayed in Production Tracking"

Select Items

These links allow you to select the items that can appear in this details page. Use the Select/Add Section Headings link to add headings to your layout for ease of navigation. Note that certain RoleManager "View" permissions take precedence, and will suppress the field if a user without the correct permissions has access to this layout.

Select Section Headings to Display
Select Items to Display

Layout order

Select the order in which the items should appears on the Details page. To re-order the items, change the number for one item, click the 'Update Order' button, and all of the fields will re-order accordingly. Check/tick the "Show Link to this Item" option to include a link to the item at the top of the details page when that item is displayed.

Section Headings are shown in bold text.

Update Order

Order	Default Description	Show link to this item
1	Similarity Check	☐
2	DOI	☐
3	Final Disposition Date	☐

History – Role Manager Permissions

Help!

Cross Check:
http://www.editorialmanager.com/robohelp/12.2/Editorial_Manager_Help/Automated_Integration_with_CrossCheck.htm

Discussion Forum:
http://www.editorialmanager.com/robohelp/12.2/Editorial_Manager_Help/Discussion_Forums.htm

Remove Submission:
http://www.editorialmanager.com/robohelp/12.2/Editorial_Manager_Help/Remove_Submission.htm

Set Final Disposition:
http://www.editorialmanager.com/robohelp/12.2/Editorial_Manager_Help/Setting_Final_Disposition.htm

Linked Submissions:
http://www.editorialmanager.com/robohelp/12.2/Editorial_Manager_Help/Linking_Submissions.htm
http://www.editorialmanager.com/robohelp/12.2/Editorial_Manager_Help/Review_Sharing_for_Linked_Submissions.htm

Custom Flags
http://www.editorialmanager.com/robohelp/12.2/Editorial_Manager_Help/Customizable_Flags_for_Submissions_and_People.htm

Assign Editor

Assigning Editors
(Additional Session Tomorrow)

Role Manager - Editor

Role Name:* `Managing Editor`

Maximum Role name is 40 characters.

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

Expand All   Collapse All

⊞ **New Submissions**

⊟ **Editor Assignment**

- ☑ Receive Assignments in 'New Assignments' Folder
  - ⦿ Receive Assignments without Invitation
  - ○ Receive Invitations for Assignments
- ☐ Always Use Search-based selection for Editor Chain Assignment / Replacement (i.e. if not Applied Automatically by System)
- ☑ Assign Editor
- ☑ Redirect to Other Editor (and be removed from Editor Chain)
- ☑ Change Corresponding Editor
- ☑ Blind Editor
- ☑ Unassign Other Editors
- ☑ Unassign Myself
  - ☑ Unassign Subordinate Editors
  - ☑ Replace Editor

Set Editor Assignment Options

Editor Assignment Options

where Author has Selected a Section/Category' automatically directs the submission to the Editor selected by the Author at the 'Select Section/Category' manuscript submission step.

If "Assign to Editors by Rotation" is selected, the submissions are automatically directed to the Editor with the oldest assignment date.

◉ Submissions go to *New Submissions Requiring Assignment* folder

☐ Except:

○ Submissions where Author has selected an Editor
Please also configure settings on the 'Set Request or Assign Editor Display Options' page.

○ Submissions where Author has selected a Section/Category
Please also assign Editors to sections on the 'Edit Sections/Categories' page.

○ Assign to Editor by Rotation
Please also select Editors on the 'Set Editor Rotation Participants' page.

Revised Submissions

The settings below control how revised manuscripts are assigned to Editors. The first choice, "Revisions go to *Revised Submissions or Revised Submissions Requiring Assignment* folder" allows manual assignment of Editors. If the "Allow reassignment to previous Editors" sub option is selected, then the user making the first editor assignment for the revision will be allowed to assign the entire chain of editors from the previous version as one step.

If the "Revisions are automatically directed to the First Assigned Editor of the previous version" choice is selected, a Revision will be automatically assigned to the First Assigned Editor of the previous version.

◉ Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder

☑ Allow reassignment to previous Editors

Letter: [Editor Assignment ▼]

○ Revisions are automatically directed to the First Assigned Editor of the previous version.

Automatically Transfer Corresponding Editor Designation

If the checkbox below is checked, when the handling Editor changes for a submission (e.g. when an editor is assigned or a decision is made), the new handling Editor will automatically be designated as the Corresponding Editor.

☑ Automatically designate the handling Editor as the Corresponding Editor.

[Cancel]   [Submit]

Action Manager - Set Letter for Editor Assignments

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
Editorial Assistant - with tech check Letters
Super User (all access) Letters
Editor-in-Chief Letters
Editor (by assignment) Letters
Editorial Assistant without tech check Letters
Editor Letters
Guest Associate Editor Letters
OUP Editor Letters
JAOCD editor Letters
Transfer Paper Editor Letters
Super - Suggest Editor User Letters
Assistant Editor Letters
Section Letters
Demo Editor Letters
Editorial Director Letters
Publisher Letters

Action Manager – Editor Assigned Event

Editor Assigned

Event	Editor Letters
Editor Assigned (Not Invited)	Editor Assignment
Editor Invited for Assignment	NONE
Editor Agree to Assignment	NONE
Editor Declines Invitation of New Submission	NONE
Editor Declines Invitation from an Editor	NONE
Editor Assigned Notification	NONE
Un-invite Editor	NONE
Editor Unassigned	NONE
Manuscript Number Assigned	NONE
Editor Unassigned Notification	NONE
Editor Redirected	NONE

Reviews and Reviewers

Search Reviewers, Review Forms and Re-Opening Reviews

Role Manager – Editor Permission to Search Reviewers

Expand All   Collapse All

⊞ **New Submissions**
⊞ **Editor Assignment**
⊟ **Reviewer Invitations**
- ☑ Invite Reviewers
- ☑ Un-Invite Reviewers
- ☐ Assign Reviewers
- ☑ Search Reviewers in Other Journals
- ☑ Override Reviewer Due Date
- ☐ Propose Reviewers
- ☐ Remove Proposed Reviewers
- ☑ Select Alternate Reviewers
- ☑ Promote Alternate Reviewers
- ☑ Link/Un-link Alternate Reviewers
- ☑ Remove Alternate Reviewers
- ☑ Request Unregistered Reviewers
- ☑ Re-open Review
- ☑ Edit Reviewer Comments and Ratings after Review is Submitted
    - ☐ Edit and Complete Reviews Terminated after Accepting Invitation

Reviewer Search Options:
- ☑ Search by Classification Matches
- ☑ Search by Personal Classifications
- ☑ Suggest Reviewers

Reviewer Search Criterion:
- ☑ People Notes
- ☐ Detailed People Notes
- ☑ Personal Classifications
- ☑ Personal Keywords

Classifications on Registration

Access to Personal Classifications (defined by an administrator) and Keywords (typed by the user) can be hidden from users when they register or update their information. You can set a maximum number of classifications that users may select or keywords they may add when they register or update their information; making an item required enforces a minimum of at least one.

Classifications and Keywords

	Hidden	Optional	Required (Minimum)	Maximum (leave blank for no limit)
Select Personal Classifications	○	◉	○	
Enter Personal Keywords	○	◉	○	

Cancel   Submit

Classifications on Submission

⊞ **Status Policies**

⊟ **Submission Policies**

→   **Edit Article Types**

    Edit Submission Items

Article Type Parameters	New Submission	Revised Submission
Set Secondary "Full Title" Preferences:	Optional	Hidden
Set "Short Title" Preferences:	Optional	Optional
Set Secondary "Short Title" Preferences:	Optional	Hidden
Set "Funding Information" Preferences:	Optional	Optional
Set "Select Section/Category" Preferences:	Optional	Optional
Set "Submit Abstract" Preferences:	Required	Required
Set Secondary "Submit Abstract" Preferences:	Optional	Hidden
Set "Enter Keywords" Preferences:	Optional	Optional
Set "Enter Secondary Keywords" Preferences:	Hidden	Hidden
→ Set "Select Classifications" Preferences:	Optional	Optional

Field Size Limitations - *Leave blank for no limit on these fields.*

Limit the *Full Title* to:		◉ Words ○ Characters
Limit the *Short Title* to:	20	◉ Words ○ Characters
Limit the *Abstract* to:	300	◉ Words ○ Characters
Limit the *Comments* to:		◉ Words ○ Characters
Maximum Number of Authors:		
Maximum Number of Keywords:	3	
→ Number of Classifications:		Minimum *A Minimum applies only when the 'Select Classifications' preference is set to "Required".*
	2	Maximum *The Maximum applies only when the 'Select Classifications' preference is set to "Optional" or "Required".*

Policy Manager

□ **Reviewer and Editor Form Policies**

Manuscript Rating Question Configuration
Edit Manuscript Rating Questions
Overall Manuscript Rating Question Settings
Edit Manuscript Rating Instructions

Reviewer Recommendation Policies
Edit Reviewer Recommendation Terms
Create/Edit Custom Review Questions
Create/Edit Review Forms
Match Review Forms to Article Types and Reviewer Roles
Set Pending Assignments Deep Link Expiration
Set Reviewer Recommendation Deep Link Expiration

Edit Reviewer Recommendation Terms

Edit Reviewer Recommendation Terms

Listed below are the terms used for Reviewer Recommendations. You may Add new terms or Remove or Edit existing terms.

Accept		Edit
Minor Revision		Edit
Major Revision		Edit
Reject		Edit
Accept with Provision	Remove	Edit

New Reviewer Recommendation Term: [   ] Add

Edit Manuscript Rating Questions

Edit Manuscript Rating Questions

A) The subject addressed in this article is worthy of investigation. Edit
B) The information presented was new.   Edit
C) The conclusions were supported by the data.   Edit
D) Clarity of Presentation   Edit

[Add New Manuscript Rating Question]

Return to PolicyManager

Edit Manuscript Rating Question

You may edit the text of the question below. This feature should be used to correct typos or change the wording of a question. This feature should NOT be used to change the fundamental meaning of the question, as it will distort historical statistics.

Insert Special Character

Edit Manuscript Rating Question: The subject addressed in this article is worthy of investigation.

Maximum Manuscript Rating Question length is 256 characters.

Choose the Manuscript Rating scale for this question:

◉ 1-3
◯ 1-5
◯ 1-10

[Cancel] [Submit]

Match Review Forms – Add MRQ's

Review Form and Manuscript Rating Configuration

In the grid below, please specify the Review Form to use for each Article Type / Reviewer Role combination. Checking "Use Manuscript Rating Questions" turns on Manuscript Rating Questions for Reviewers of the specified Article Types. Use the "Select" link to choose which Manuscript Rating Questions to use for the associated Article Type and Reviewer Role.

Cancel   Submit

Display Manuscript Rating Question Responses to Author' for all Reviewer Roles/Article Types

Reviewer Role Article Type	Test Reviewer	Reviewer
Quick Submission	New: Demo Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form	New: Demo Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form
Original Study	New: Demo Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form	New: Demo Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form

Match Review Forms – Add MRQ's (cont.)

Reviewer Manuscript Rating Questions
Original Study / Test Reviewer

Check the boxes to include the questions in Manuscript Ratings for this Article Type/Reviewer Role. Reviewers are presented with these questions when submitting their review. You may change the order of the question display for Reviewers by renumbering the boxes in the Order column. You can also specify whether answering the question is Optional or Required. If a question is Required, the Reviewer will not be permitted to submit a recommendation without first answering the question.

Select All

Select	Order	Manuscript Rating Question	Answering the Question is:	
☑	1	A) The subject addressed in this article is worthy of investigation.	◉ Required	○ Optional
☑	2	B) The information presented was new.	○ Required	◉ Optional
☑	3	C) The conclusions were supported by the data.	○ Required	◉ Optional
☐		D) Clarity of Presentation	◉ Required	○ Optional

Apply these Questions to All Reviewer Role / Article Types

Cancel   Submit

Create Custom Review Questions

Create Custom Review Questions

Listed below are the custom questions which may be displayed as part of a Review Form.

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

To add a new question, click the Add button.

Add

Question	Actions
Is there a financial or other conflict of interest between your work and that of the authors?	Edit
Quality of Illustrations	Edit
Would you be willing to review a revision of this manuscript?	Edit
This proposal is for a novel application.	Edit
If you answered not applicable to question 3, please indicate why?	Edit
Another example of a list type question.	Edit
Yet another list example	Edit
Please indicate if you would like review a revision of this paper?	Remove Edit
Do you have any conflicts of interest?	Remove Edit

Add

Create/Edit Review Forms

Match Reviewer Forms to Article Types and Reviewer Roles

Return to PolicyManager

Add New Custom Review Question

Add Custom Review Question

Enter the question, default response text (if required), and any instructions to be displayed as part of the Review Form used at the Submit Recommendation step of the review process. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Review Question is no longer available for inclusion in new Review Forms.

Reviewer responses must be configured to use a specific Response Type: **Text** and **Notes** responses can contain any mix of characters and numbers. A **Date** response must be entered in a mm/dd/yyyy format. **Integer** and **Decimal** responses can contain only a number or decimal point. A **List** response requires the Reviewer to select from the list of responses. If **List** is chosen for the response type, additional options will appear which allow configuration of the list choices and type (dropdown, radio, checkboxes or scrolling selector). The **Yes/No** and **Yes/No/NA** response types will create a dropdown list with the options of Yes, No and Yes, No, Not Applicable, respectively. The **Yes/No/Text** response type will display a text box to gather additional information if the user chooses an option which requires further clarification.

| Cancel | Submit |

Question: Insert Special Character

Instructions for Reviewer Response: Insert Special Character

☐ **Hide:** When you **Hide** a Custom Review Question, the question is deactivated (not available for use with new Review Forms).

Add New Custom Review Question (cont.)

Instructions for Reviewer Response: Insert Special Character

☐ **Hide:** When you **Hide** a Custom Review Question, the question is deactivated
   (not available for use with new Review Forms).

☐ **Available for Decision Letter Merging:** When you select this checkbox, both the question and answer can be merged into the decision letter using
   the %REVIEW_QUESTIONS_AND_RESPONSES% or %RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR% merge fields. Editors will
   be able to de-select individual responses from any Reviewer before the Author is notified. The question and answer will also be inserted into Reviewer
   Invitation/Assignment Letters by the %REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR% merge field, for those reviews
   explicitly selected by the Editor for inclusion

Response Type: Text ▼
                            Text
                            Date
Minimum Field Length: Integer   an or equal to the Maximum Field Length)
                            Decimal
                            Notes
Maximum Field Length: List
                            Yes/No   o 200)
                            Yes/No/NA
                            Yes/No/Text

Default Value for Field: ⦿ None
                              ○ Single Value (enter value below)

                            Insert Special Character

                              Cancel   Submit

Create/Edit Review Forms

Create/Edit Review Forms

Edit Review Form

Review Form Name: Demo Review Form

☐ Hide - When you **Hide** a Reviewer Form, the form will be deactivated (not available for use with any Article Types).

Reviewer Instructions:

☐ Display Reviewer Instructions in popup   Insert Special Character

Thank you for taking the time to review for the Aries Demo Journal.

Please answer all questions as completely as possible.

Should you have any questions, please contact your Aries Account Coordinator.

Authorization to Transfer Review   Edit Questions

Question	Display on Review Form
If this submission is transferred to another publication, do we have your consent to include your identifying information?	☐
If this submission is transferred to another publication, do we have your consent to include your review?	☐
If this submission is transferred to another publication with "Open Peer Review", do we have your consent to publish your review in a pre-publication history?	☐

Create/Edit Review Forms

Instructions for Transfer Authorization

Edit Instructions

It is possible that this submission may be transferred to another publication at the conclusion of the peer review process. If the submission is transferred, we would like to include your review. We would also like to include your identifying information, so that the other publication can contact you if necessary. If you agree, we may transfer your name, degree(s), position, department, institution, address, phone number and e-mail address. Your review and identifying information will not be transferred unless you give your consent.
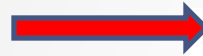
Custom Review Questions

Select Questions

Order	Question	Required for Submission	Visible to Other Reviewers	Visible to Author	Actions
1	Is there a financial or other conflict of interest between your work and that of the authors?	☑	☐	☐	Remove
2	Quality of Illustrations	☐	☐	☐	Remove
3	Would you be willing to review a revision of this manuscript?	☑	☐	☐	Remove
4	This proposal is for a novel application.	☐	☐	☐	Remove
5	If you answered not applicable to question 3, please indicate why?	☐	☐	☐	Remove
6	Another example of a list type question.	☐	☐	☐	Remove
7	Yet another list example	☐	☐	☐	Remove

Update Item Order

Create/Edit Review Forms (cont.)

☑ **Display Comments to Author text box**

    ○ Merge into Editor Comments in Decision Chain

    ◉ Keep separate from Editor Comments in Decision Chain

Default Text for Comments to Author: **Insert Special Character**

☑ **Display Comments to Editor text box**

Default Text for Comments to Editor: **Insert Special Character**

Order	Review Form Section
1	Reviewer Instructions
2	Manuscript Rating Questions
3	Custom Review Questions
4	Comments to Authors and Editors
5	Authorization to Transfer Review

Update Order

Match To Article Types

Review Form and Manuscript Rating Configuration

In the grid below, please specify the Review Form to use for each Article Type / Reviewer Role combination. Checking "Use Manuscript Rating Questions" turns on Manuscript Rating Questions for Reviewers of the specified Article Types. Use the "Select" link to choose which Manuscript Rating Questions to use for the associated Article Type and Reviewer Role.

Cancel   Submit

Display Manuscript Rating Question Responses to Author' for all Reviewer Roles/Article Types

Reviewer Role / Article Type	Test Reviewer	Reviewer
Quick Submission	New: Demo Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form	New: Demo Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form
Original Study	New: Demo Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form	New: Demo Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form
Editorial	New: Default Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form	New: Default Review Form ☑ Use Manuscript Rating Questions Select ☐ Display Responses to Author Revised: Default Review Form

Role Manager – Reviewer

RoleManager

Author Role
Reviewer Role
Editor Role
Publisher Role

Edit Role Definition

Role Name:* Reviewer

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

Expand All   Collapse All

⊞ **Permissions for New Reviewer Invitations**
⊞ **Permissions for Pending Assignments and Completed Assignments**
⊞ **Permissions for Completed Assignments Only**
⊞ **General Permissions (Applicable to All Reviewer Pages)**

Cancel   Submit

Role Manager – Reviewer

Role Manager – Reviewer (cont.)

☑ View Author Decision Letter
    ○ View Unblinded Version
    ◉ View Blinded Version
☑ View Un-Blinded Reviews for Open Peer Review
☑ View Other Reviewer's Comments to Author
☑ View Other Reviewer's Comments to Editor
☑ View Author's Response to Reviewer Comments
☑ View Reviewer's Own Review History
☑ Send Ad Hoc E-mail
☐ Search Similar Articles in MEDLINE
☐ Search Author Publications in MEDLINE
Bibliographic Search
    ☐ Google Scholar Title Search
    ☐ PubMed Title Search
    ☐ PubMed Author Search
    ☐ PubMed All Authors Search
    ☐ PubMed Classifications Search
    ☐ PubMed Keywords Search
    ☐ Google Title Search
    ☐ Google Scholar Author Search

Cancel   Submit

Create & Store Blinded Decision Letter

⊟ **E-mail and Letter Policies**

Edit Letters

Define Custom Merge Fields

Set "Email From" Address

Set Non-Email "Preferred Method Of Contact" Correspondence Email Address

Configure Email Import

Set Notify Author Blinding Policy

Set Notify Editor Preference

Set Notify Author Blinding Policy

When the Editor notifies the Author of the Editor's decision (Notify Author letter), the Editor may review and edit the final letter sent to the Author.

If your journal is running a double-blind system, you should select the option 'Create and store a blinded version of the Notify Author of Decision letter'. When this option is selected, the Author information will be stored as un-merged fields (e.g. %LAST_NAME%) in the decision letter. This ensures that any modifications to the final decision letter will not reveal information about the Author. Note that the fields will be merged into the letter when it is actually sent to the Author, or if the Editor clicks the 'Preview Letter' button.

If your journal is *not* running a double-blind system, you should select the option 'Do not create and store a blinded version of the Notify Author of Decision letter'. When this option is selected, the Author information will be merged into the letter.

- ⦿ Create and store a blinded version of the Notify Author of Decision letter
- ○ Do not create and store a blinded version of the Notify Author of Decision letter

Cancel   Submit

Reviewer Attachment Sanitization

Reviewer Attachment - Sanitization

Configure Attachment Security

[Cancel] [Submit]

Sanitization

Files uploaded by Editors and Reviewers as part of their work on the submission ("Attachments") may be made available to the Author and other Reviewers. Check the box below and click the 'Submit' button to "sanitize" these files by removing identifying information from the 'File Properties' and 'Track Changes' features of Microsoft Office files, and the 'Properties' of PDF files. PDF annotations (with the exception of dynamic stamps) are also sanitized. Note: any personal identifying information included in the actual text of the file must be removed manually.

If sanitization is enabled, Authors will only have access to the sanitized version of the Attachments. Editors will have access to both the original and sanitized files. Reviewers will have access to the original files unless the checkbox 'Allow other Reviewers access only to Attachments with personal information removed' is selected.

Important Notes: Any Attachments which are not in Microsoft Office or PDF format will not have identifying information removed. Microsoft Office files include Word, Excel, and PowerPoint.

If the checkboxes are unchecked, Authors and/or Reviewers will only have access to the original (unsanitized) files, even if sanitized files have been created.

☑ Remove Personal Information from Editor/Reviewer Attachments in Microsoft Office or PDF format.

☑ Allow other Reviewers access only to Attachments with personal information removed.

Reviewer Attachment - Availability

Role Manager – Author: Blind Settings
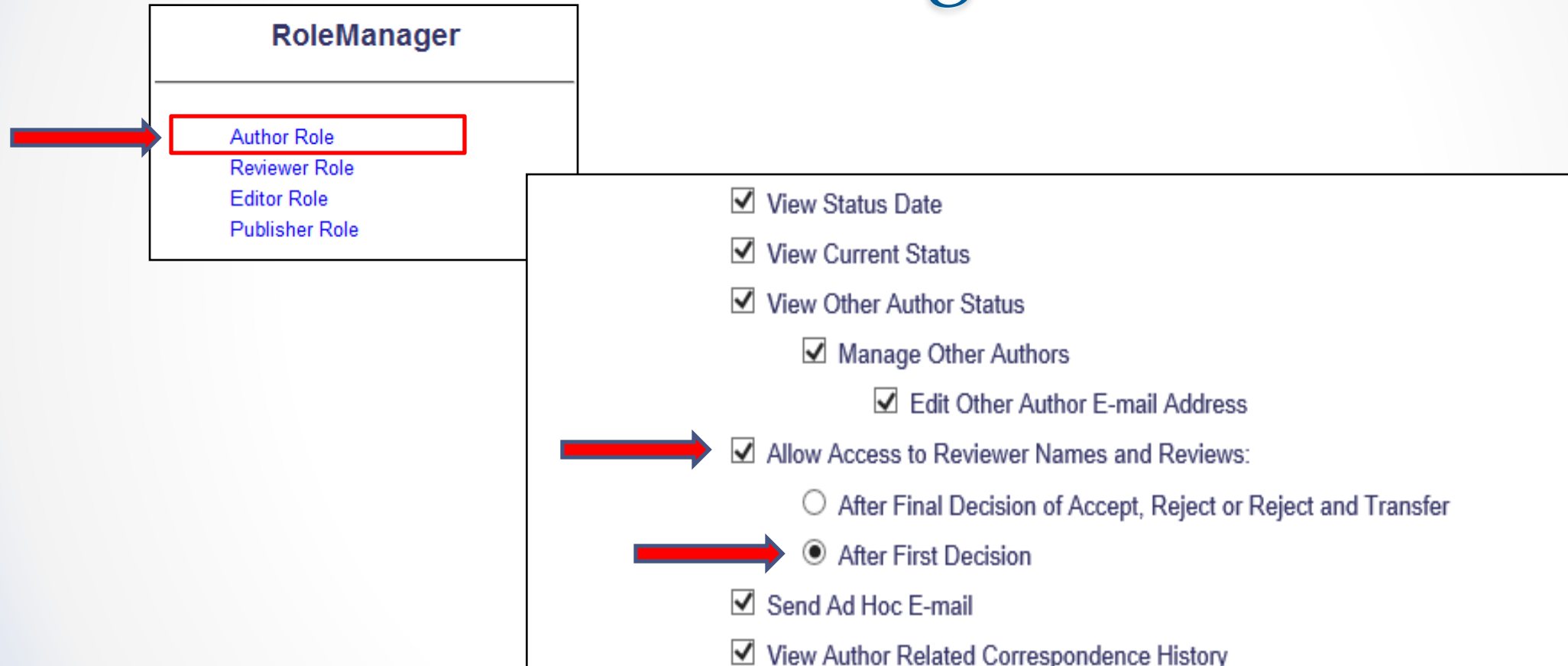
Editor Decisions

· · ·

Forms and Comments

Required Reviews Complete

Reviewer Parameters:

Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.

New and Revised Submissions

`2`

Must be 0 or greater.

Set this value to zero to turn off the automatic un-invitation process for all Reviewers who have not responded to an invitation.

Set this value to zero to turn off the automatic un-assign process for all Reviewers who have accepted an invitation but not submitted a review on time.

Select this box to

Reviewer Search

◉ Search My Publication   `Search for Reviewers` ▾   from   `All Reviewers` ▾   `Go`
◯ Reviewer Discovery from ⃝ pivot   ProQuest Community of Scholars

⊟ **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-assign Reviewers n days after 'Date Review Due'

`2`

Role Manager – Editor (reviews)

☐ **Reviewer Invitations**
- ☑ Invite Reviewers
- ☑ Un-Invite Reviewers
- ☑ Assign Reviewers
- ☑ Search Reviewers in Other Journals
- ☑ Override Reviewer Due Date
- ☑ Propose Reviewers
- ☑ Remove Proposed Reviewers
- ☑ Select Alternate Reviewers
- ☑ Promote Alternate Reviewers
- ☑ Link/Un-link Alternate Reviewers
- ☑ Remove Alternate Reviewers
- ☑ Request Unregistered Reviewers
- ☑ Re-open Review
- ☑ Edit Reviewer Comments and Ratings after Review is Submitted
    - ☑ Edit and Complete Reviews Terminated after Accepting Invitation

Reviewer Search Options:
- ☑ Search by Classification Matches
- ☑ Search by Personal Classifications

Role Manager – Editor (Decisions)

☑ Make a Decision

☑ Terminate Outstanding Reviewer and Editor Assignments when Making a Decision

Skipped in Decision Chain if previous Editor's Decision IS

| Accept |
| Revise |
| Reject |
| Super Editor Decision |

Skipped in Decision Chain if previous Editor's Decision IS NOT

| Accept |
| Revise |
| Reject |
| Super Editor Decision |

☑ Notify Author after making a Decision
　　◉ Draft Notification Letter for any decision
　　　　☑ Send Any Notification Letter
　　○ Only Notify after selected decisions:

Decision Term	Decision Only	Draft	Draft and Send
Accept	◉	○	○
Revise	◉	○	○
Reject	◉	○	○
Super Editor Decision	◉	○	○
Reject and Transfer	◉	○	○

☑ Modify Editor Manuscript Rating Answers During Decision Process
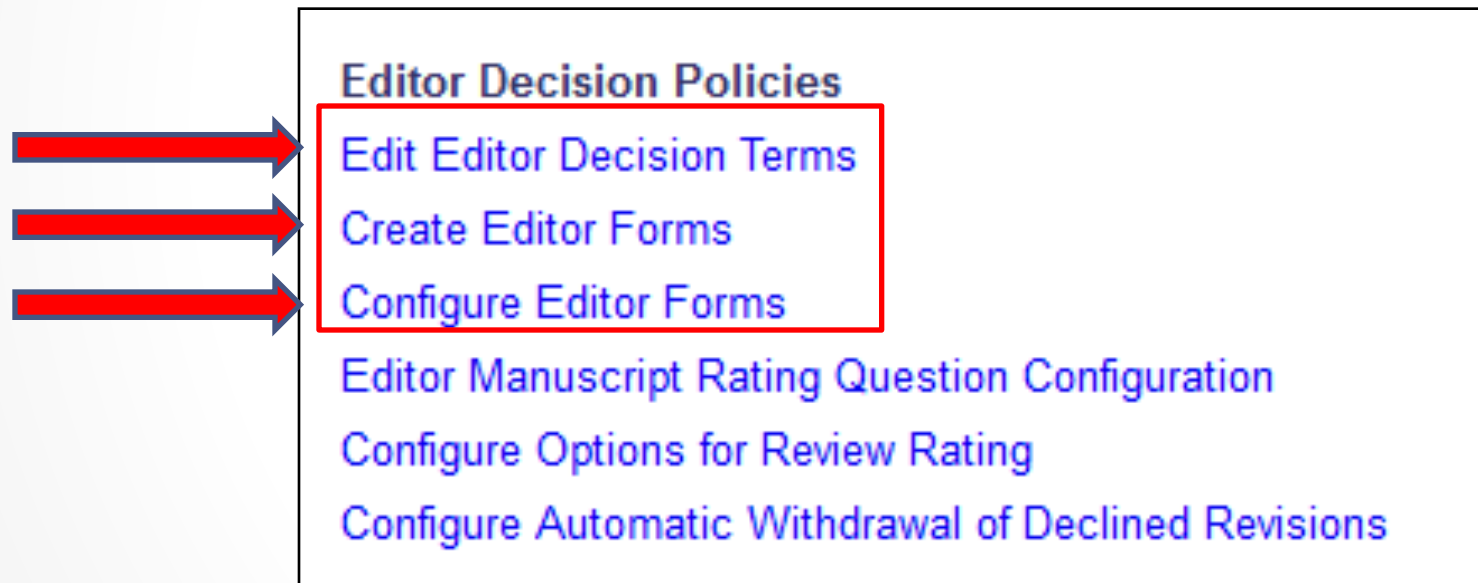
☑ Edit Editor Comments and Ratings After Decision

☑ Notify Author of Editor's Decision when Editor Chain is Complete
　　☑ And Modify Editor's Decision

Policy Manager – Editor Forms

Editor Decision Terms

Alternative Text for Authors Configuration – Policy Manager > Status Policies > Edit Document Statuses

Editor Decision Terms

Add/Edit Editor Decision Term

The Author Notification letter is a letter in the 'Decision' family that notifies the Author of the Editor's decision. You may select one default and multiple optional letters for each Decision Term. If more than one letter is selected, the Editor may choose from these letters at the time of Author Notification

The Reviewer Notification Letter is a letter which can be sent to each Reviewer at the time the Author Notification Letter is sent.

The Document Status is the status displayed in the system when the decision is made.

Each decision term must be mapped to a Decision Family value of Accept, Reject, Revise or Reject and Transfer. This is used internally by Editorial Manager to push submissions through the system properly.

Decision terms mapped to the Reject and Transfer Decision Family trigger additional functionality that allows the Author to agree or decline to transfer the submission to another publication. Please note that you must also configure at least one transfer target publication in AdminManager.

Editor Decision Term: Accept
Author Notification Letter Options:

Default Optional Letter Purpose

○	☐	None Selected
⦿	☑	Editor Decision - Accept
○	☐	Editor Decision - Reject
○	☐	Editor Decision - Revise
○	☐	Presub Accept
○	☑	Editor Smith Accept Decision Letter
○	☐	Editor Decision - Major Revision
○	☐	X Reject and Transfer
○	☐	Editor Decision - Reject and Transfer

Reviewer Notification Letter: Reviewer Notification of Accept Decision ▾

Document Status: Accept ▾

Decision Family: Accept ▾

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

[Cancel] [Submit]

Create Editor Forms

Create Editor Forms

Default Editor Form   Edit

Add New Editor Form

Match Editor Forms to Article Types and Editor Roles

Return to PolicyManager

Create Editor Forms

Edit Editor Form - Default Editor Form

Editor Form Name: Default Editor Form

Editor Instructions: Insert Special Character

A button appears on the Editor Decision and Comments screen called Editor Instructions, if an Editor clicks this button a window will open with custom instructions for the Editor. A journal must enter the instructions for Editor into the EM system, in PolicyManager, in order for this button to appear on the Editor Decision and Comments screen.

TO CONFIGURE: To enter your Editor instructions, go to System Administrator Functions, PolicyManager, Configure Forms and Manuscript Rating Questions, Create Editor Forms and select an Editor form you wish to edit OR create a new form. You will see two text boxes, one called Editor Instructions, the other called Editor Form. Type your instructions for Editors into the Editor Instructions text box. If the box is empty, the Editor Instructions button will not appear on the Editor Decision and Comments screen.

NOTE: The Editor cannot edit anything in this window. They can however copy and paste from this window. This means that you can create multiple types of Editor forms/questionnaires for different Editors and/or Article types. The Editor can copy the appropriate section of text and paste it into the appropriate box.

Editor Form: Insert Special Character

Is there a financial or other conflict of interest between your work and that of the authors?

YES __   NO __

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

Create Editor Forms (cont.)

Configure Editor Forms – Match AT and Roles

Editor Form Configuration

In the grid below, please specify the Editor Form used for each Article Type / Editor Role combination. The Editor Form selected indicates the Editor Instruction the "Editor Confidential Comments to Editor" box that Editors see on the Submit Editor Decision page.

Editor Role / Article Type	Managing Editor	Editor (by invitation)	Editorial Assistant - with tech check	Super User (all access)	Editor-in-Chief	Editor (by assignment)
Quick Submission	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form
Original Study	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form
Editorial	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form
Review	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form
Rapid Communication	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form
Case Report	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form
Letter to the Editor	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form	Default Editor Form