

Welcome to the 17th Annual  
**EMUG BOSTON**

#EMUG2019



# EMUG 2019

## **Effective Communication In Editorial Manager**

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# What we'll cover...

- People-based correspondence history (16.0)
- Configuring a custom Drop-box name for email import (16.0)
- Editors can update co-author verification statuses (16.0)
- Existing functionality that makes communication within the system easier and more effective
- Final thoughts
- Questions

# Why Effective Communication Matters in Editorial Manager

# Why Effective Communication Matters in EM

- Communication via email/letters is a cornerstone of how EM is structured
- Maintaining deadlines across peer-review and production
- Assignments, invitations, reminders, etc.
- Communication methods come in many forms



# People-Based Correspondence History (v16.0)

# People-Based Correspondence History

- In previous versions of EM, correspondence history was submission-centric

| Action   | Manuscript Number | A  |
|--|-------------------|----|
| <a href="#">View Submission</a><br><a href="#">Duplicate Submission Check (0%)</a><br><a href="#">Details ▾</a><br><a href="#">History</a> ←<br><a href="#">Classifications</a><br><a href="#">Unassign Editor</a><br><a href="#">File Inventory</a><br><a href="#">Edit Submission</a><br><a href="#">Invite Reviewers</a><br><a href="#">Solicit Commentary</a><br><a href="#">View Reviews and Comments</a><br><a href="#">Set Final Disposition</a><br><a href="#">Initiate Production</a><br><a href="#">Google Scholar Title Search</a><br><a href="#">PubMed - Title</a><br><a href="#">Similar Articles in Scopus</a><br><a href="#">Send E-mail</a><br><a href="#">Linked Submissions</a> | DEMOJC-D-19-00017 | Oi |

| CORRESPONDENCE HISTORY       |  |                  |                      |          |  |
|------------------------------|--|------------------|----------------------|----------|--|
| Add Editorial Correspondence |  |                  |                      |          |  |
| Correspondence Date          | Letter   | Recipient        | Status               | Revision | Operator   |
| Mar 20, 2019                 | <a href="#">Reviewer Thank You</a>                         | Amy Analyst      | Under Review         | 0        | Amy Analyst<br>[Proxied by mary mary, M.D.]      |
| Mar 20, 2019                 | <a href="#">Journal Office Notice Completed Review</a>     | mary mary, M.D.  | Under Review         | 0        | Amy Analyst<br>[Proxied by mary mary, M.D.]      |
| Mar 20, 2019                 | <a href="#">Reviewer Instructions and Due Date</a>         | Amy Analyst      | Under Review         | 0        | Amy Analyst<br>[Proxied by mary mary, M.D.]      |
| Mar 20, 2019                 | <a href="#">Editor Notice Reviewer Agrees to Review</a>    | Arnold Appraiser | Under Review         | 0        | Amy Analyst<br>[Proxied by mary mary, M.D.]      |
| Mar 20, 2019                 | <a href="#">Editor Notice Reviewer Agrees to Review</a>    | mary mary, M.D.  | Under Review         | 0        | Amy Analyst<br>[Proxied by mary mary, M.D.]      |
| Mar 20, 2019                 | <a href="#">Reviewer Invitation</a>                        | Amy Analyst      | Under Review         | 0        | Arnold Appraiser<br>[Proxied by mary mary, M.D.] |
| Mar 20, 2019                 | <a href="#">Editor Assignment</a>                          | Arnold Appraiser | With Editor          | 0        | mary mary, M.D.                                  |
| Mar 20, 2019                 | <a href="#">Author Notice of Manuscript Number</a>         | mary mary, M.D.  | Manuscript Submitted | 0        | mary mary, M.D.                                  |
| Mar 18, 2019                 | <a href="#">Author - Other Author Verification</a>         | Mike Gordon      | Manuscript Submitted | 0        | mary mary, M.D.                                  |
| Mar 18, 2019                 | <a href="#">Journal Office Notice New Submission</a>       | mary mary, M.D.  | Manuscript Submitted | 0        | mary mary, M.D.                                  |
| Mar 18, 2019                 | <a href="#">Author Submits New Manuscript Confirmation</a> | mary mary, M.D.  | Manuscript Submitted | 0        | mary mary, M.D.                                  |
| Mar 18, 2019                 | <a href="#">PDF Built and Requires Approval</a>            | mary mary, M.D.  | Needs Approval       | 0        | mary mary, M.D.                                  |
| Feb 22, 2019                 | <a href="#">PDF Built and Requires Approval</a>            | mary mary, M.D.  | Needs Approval       | 0        | mary mary, M.D.                                  |

# People-Based Correspondence History

- Letters not tied to submissions were only accessible through reporting
- Proxy registration letters, batch E-mails, Automated Summary Reminders, and 'Send Login Details' e-mails.

| Letter   | Recipient       |
|--|-----------------|
| <a href="#">Publisher Notification of Accepted Manuscript</a>      | mary mary, M.D. |
| <a href="#">Editor Decision - Accept</a>                           | Eddie Vedder    |
| <a href="#">Journal Office Notice Editor Decision Notification</a> | mary mary, M.D. |
| <a href="#">Editor Assignment</a>                                  | Matt Cameron    |
| <a href="#">Author Notice of Manuscript Number</a>                 | Eddie Vedder    |
| <a href="#">Editor Notice Author Approve Changes</a>               | mary mary, M.D. |
| <a href="#">Author Notice - Technical Check failure</a>            | Eddie Vedder    |
| <a href="#">Journal Office Notice New Submission</a>               | mary mary, M.D. |
| <a href="#">Author Submits New Manuscript Confirmation</a>         | Eddie Vedder    |
| <a href="#">PDF Built and Requires Approval</a>                    | Eddie Vedder    |



# People-Based Correspondence History

- People-based Correspondence History is *user-centric*
- Manifest of all correspondence user has sent and received
- All letters now have easy access for users

| Correspondence Date | Letter                                     | Recipient  |
|---------------------|--|------------|
| 04/30/2019 14:58:12 | Send Username and Password                 | Sean Avery |
| 04/30/2019 14:55:24 | Editor Invitation                          | Sean Avery |
| 02/26/2019 15:26:48 | Editor Notice Reviewer Agrees to Review    | Sean Avery |
| 02/26/2019 15:24:33 | Editor Assignment                          | Sean Avery |
| 07/23/2018 10:48:48 | Editor Decision - Accept                   | Sean Avery |
| 07/23/2018 10:41:39 | Author Notice of Manuscript Number         | Sean Avery |
| 07/06/2018 15:52:00 | Author Submits New Manuscript Confirmation | Sean Avery |
| 07/06/2018 15:48:46 | PDF Built and Requires Approval            | Sean Avery |
| 06/14/2018 09:30:15 | Welcome                                    | Sean Avery |

# People-Based Correspondence History- Customization

Choose Fixed Date Range: All Dates

Enter Customized Date Range (mm/dd/yyyy): Start Date:   End Date:

- Can sort by date of correspondence
- Powergrid-style customization

| Correspondence Date | Manuscript Number     | Letter                                     | Article Title                           |
|---------------------|-----------------------|--|---|
| 04/30/2019 14:26:14 | DEMOJCBeta-D-19-00062 | Editor Agrees to Handle Assignment         | Can this message populate the History?> |
| 04/30/2019 14:21:10 |                       | Update your Keywords and Classifications   |   |
| 04/29/2019 10:15:30 | DEMOJCBeta-D-19-00064 | Journal Office Notice All Reviews Complete | Yours to make                           |
| 04/29/2019 10:15:28 | DEMOJCBeta-D-19-00064 | Journal Office Notice Completed Review     | Yours to make                           |
| 04/29/2019 10:14:43 | DEMOJCBeta-D-19-00064 | Editor Notice Reviewer Agrees to Review    | Yours to make                           |
| 04/29/2019 09:44:25 | DEMOJCBeta-D-19-00064 | Journal Office Notice Completed Review     | Yours to make                           |
| 04/29/2019 09:41:24 | DEMOJCBeta-D-19-00064 | Editor Notice Reviewer Agrees to Review    | Yours to make                           |
| 04/29/2019 09:36:49 | DEMOJCBeta-D-19-00064 | Author Notice of Manuscript Number         | Yours to make                           |
| 04/29/2019 09:35:54 | DEMOJCBeta-D-19-00064 | Journal Office Notice New Submission       | Yours to make                           |
| 04/29/2019 09:35:54 | DEMOJCBeta-D-19-00064 | Author Submits New Manuscript Confirmation | Yours to make                           |

# People-Based Correspondence History- Customization

- Same 'fix/show' functionality as a Submission Search

**Grid Options**

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

| Column Header       | Fixed                               | Show                                |
|---------------------|-------------------------------------|-------------------------------------|
| Correspondence Date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Manuscript Number   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Letter              | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Article Title       | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Recipient           | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

# People-Based Correspondence History: *Viewing Your Own*

- “Update My Information” banner link
- No permissions required



HOME • LOGOUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW  
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS • PRIVACY

## Update My Information

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

Correspondence History



Insert Special C

### Login Information

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

Username \*

Password \*  Password Rules

Re-type Password \*

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

Default Login Role:

# People-Based Correspondence History: *Viewing Others'*

- Two different ways
- Via 'Search People'

New column in Search People results



| Merge People             | Name             | City   | State or Province | Country       | Author Role | Reviewer Role | Editor Role            | Publisher Role | View Correspondence History            |
|--------------------------|------------------|--------|-------------------|---------------|-------------|---------------|------------------------|----------------|--|
| <input type="checkbox"/> | Eddie Vedder     |        |                   | UNITED STATES | [Author]    |               | [Third Party Vendor]   |                | <a href="#">Correspondence History</a> |
| <input type="checkbox"/> | Sally Solicitor  | Canton | MA                | UNITED STATES | [Author]    | [Reviewer]    |                        |                | <a href="#">Correspondence History</a> |
| <input type="checkbox"/> | Steven Rinella   |        |                   | UNITED STATES | [Author]    |               | [Production Assistant] |                | <a href="#">Correspondence History</a> |
| <input type="checkbox"/> | Frank Reynolds   |        |                   | UNITED STATES | [Author]    | [Reviewer]    |                        |                | <a href="#">Correspondence History</a> |
| <input type="checkbox"/> | Robert Reviewer  |        |                   | UNITED STATES | [Author]    | [Reviewer]    |                        |                | <a href="#">Correspondence History</a> |
| <input type="checkbox"/> | Richard Reviewer |        |                   | UNITED STATES | [Author]    | [Reviewer]    |                        |                | <a href="#">Correspondence History</a> |

# People-based Correspondence History: Viewing Others'

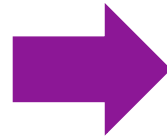
- Also via the user's People Record

Download Search Results

Page: 1 of 1 (1 total People Matches)

| Merge People             | Name         | City | State or Province | Country       | A |
|--------------------------|--------------|------|-------------------|---------------|---|
| <input type="checkbox"/> | Eddie Vedder |      |                   | UNITED STATES |   |

Page: 1 of 1 (1 total People Matches)



### User Information

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

Default Login Role:

Default Login Menu:

Available as a Reviewer? Yes  No

Board Member? Yes  No

Forbidden as a Reviewer? Yes  No

Reviewer Role \*:

Publisher Role \*:

Editorial Role \*:

Editor Description:



# People-Based Correspondence History: Permissions

In Rolemanager...

- -Search People
- -View Personal Correspondence History
- -View Submission Production Correspondence History
- -View Schedule Group Production Task Assignment History



# Restrictions on Personal Correspondence History

- Blinded editors
- Cannot be viewed while in proxy mode
- Production task/Schedule group production task correspondence history won't appear without corresponding permissions.





# Configuring Custom Drop-box Address for E-mail Import (16.0)

# Configuring Drop Box Name for Email Import

- Available in PolicyManager > Configure Email Import
- Current EM functionality allows users to generate a 'Drop Box' email address
- External correspondence (reply to system email) can be forwarded here
- Automatically imports the email into a submission's correspondence history



- All Reviews Complete for DEMO-AM-19-171 - [EMID:dd2ef8cca583d89c]



• **The Journal** <em@editorialmanager.com>

To: Scott Farmer

Ref.: Ms. No. DEMO-AM-19-171

Test Manuscript

Mr. Shaun Morgan

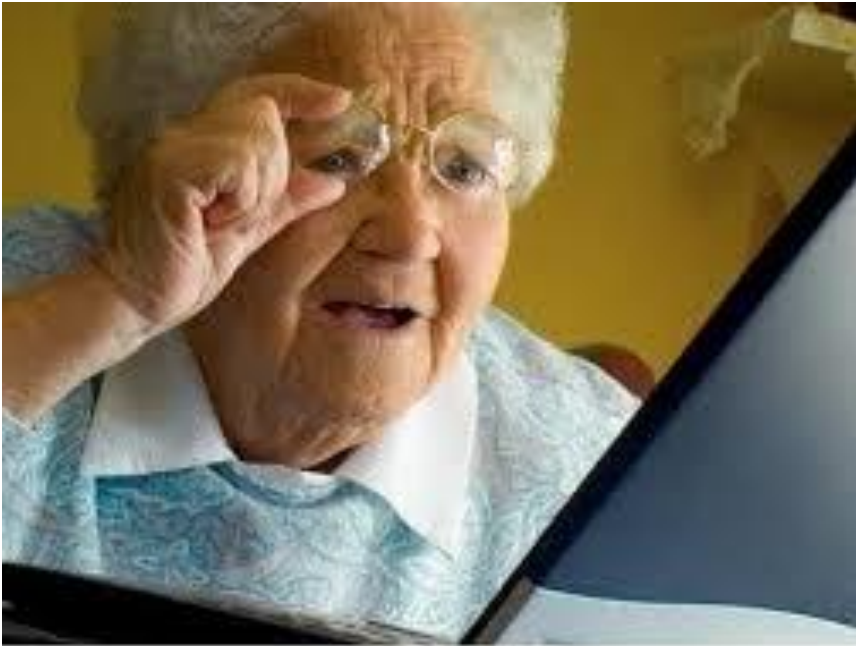
AP DEMO SITE

Dear Dr Farmer,

All reviews for manuscript DEMO-AM-19-171 have been submitted.

# Configuring Drop Box Name for Email Import

- Generated address was complex
- Especially complicated for editors working/forwarding to multiple journals



`em.demojcbeta-067f8d45f954630b@editorialmanager.com`

# Configuring Drop Box Name for Email Import

- New in Editorial Manager v16.0, users now have the option to configure their Drop Box address for email import.

- ☐ **E-mail and Letter Policies**
  - Edit Letters
  - Define Custom Merge Fields
  - Set "Email From" Address
  - Manage Preferred Method of Contact Settings
  - Configure Waiver Request
  - Configure Email Import ←
  - Set Notify Author Blinding Policy
  - Set Notify Editor Preference

## Set 'Drop-Box' Email Address:

Creating and submitting a new address will permanently replace any existing address. This allows a publication to retire an address that has become a target for spam emails. (Previously used addresses cannot be used again.)

No address configured. Email will not import into this publication. ←

- Configure drop-box email address manually
- Generate drop-box email address automatically

Create

# Configuring Drop Box Name for Email Import

- Address can be personalized
- Ideal for editors who work with multiple EM sites

### Configure Drop-Box Email Address

Enter the configurable portion of the drop-box email address in the box below. The prefix and suffix cannot be changed.  
The drop-box email address:

- Can only include letters, numbers, periods (.) and dashes (-).
- Cannot be reused once it has been cleared.
- Becomes active when the Submit button is clicked on the Configure Email Import page.

em.demojcbeta-  @editorialmanager.com

# Configuring Drop Box Name for Email Import: Including Subject Lines

- Subject lines of imported emails now display in History
- Previously displayed as 'Imported Email'

## Set 'Drop-Box' Email Address:

Creating and submitting a new address will permanently replace any existing address. This allows a publication to retire an address that has become a target for spam emails. (Previously used addresses cannot be used again.)

No address configured. Email will not import into this publication.

- Configure drop-box email address manually
- Generate drop-box email address automatically

Create

Display imported email subject in Correspondence History - This option displays the subject line of an imported email in the Letter column.

Cancel

Submit

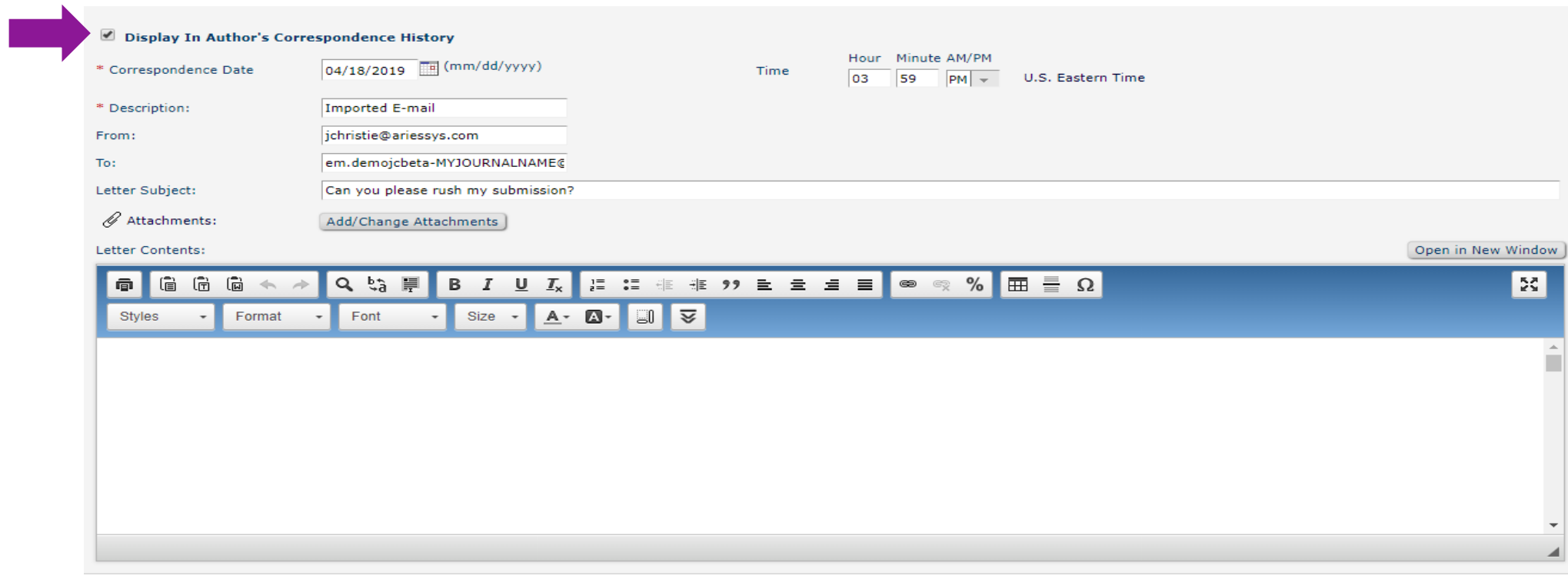
Apr 18, 2019

Can you please rush my submission? (External)

Remove Edit

# Configuring Drop Box Name for Email Import: Manually Adding External Correspondence

- Editors with permission can edit the imported email
- Option to display in Correspondence History (if authors have permission)



A screenshot of a web-based email import configuration form. A purple arrow points to the checkbox labeled "Display In Author's Correspondence History", which is checked. Below this, the form includes fields for "Correspondence Date" (04/18/2019), "Time" (03:59 PM, U.S. Eastern Time), "Description" (Imported E-mail), "From:" (jchristie@ariessys.com), "To:" (em.demojcbeta-MYJOURNALNAME@), "Letter Subject:" (Can you please rush my submission?), and "Attachments:" (Add/Change Attachments). At the bottom, there is a "Letter Contents:" section with a rich text editor toolbar and a large text area. An "Open in New Window" button is located in the top right corner of the form.

# Editors Can Update Co-Author Verification Statuses (16.0)



# Editors Can Update Co-Author Verification Statuses

- Enabled in Policymanager > Edit Article Types
- Co-author Verification allows other authors to confirm contribution to a submission.
- Late/missing responses do not inhibit peer-review process.



# Editors Can Update Co-Author Verification Statuses

- Co-authors are sent verification letter.
- Two links provided to confirm or deny affiliation.

Re: Hope All My Co-Authors Verify Correctly!  
by mary mary

Dear Coauthor,

You have been listed as a contributing author for the above manuscript. Please verify your contribution by clicking one of the below links.

Yes, I am affiliated: <https://www.editorialmanager.com/demojcbeta/l.asp?i=703&I=ZJSBR14S>

No, I am not affiliated: <https://www.editorialmanager.com/demojcbeta/l.asp?i=704&I=A8HIMMBN>

Thank you,

DEMO JC Beta Site (CS Site)



# Editors Can Update Co-Author Verification Statuses

- After verifying, can fill out the Author Questionnaire (if configured)
- Can confirm now or save answers for later

[insert special character](#)

**Verify Contributing Authorship**

---

If you are unable to complete your responses at this time, please click on the "Save for Later" button to save your work. To return to this page later, click on the Verify deep link in the email that you were sent regarding this submission, or save the following URL and enter it in your browser's address bar.

<http://www.editorialmanager.com/demojcbeta/l.asp?i=760&l=GB0P3N0E>


---

Please respond to the questions/statements below and click on the "Submit to Publication" button to complete your Co-Author verification for the submission.

If you do not submit your responses, your contribution will not be confirmed. If you click on the "Save for Later" button, your contributing authorship will not be confirmed, but you can return to this page later to complete your responses.

---

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



# Editors Can Update Co-Author Verification Statuses

- Sometimes incorrect links are clicked or emails get lost in the shuffle.
- This can lead to incorrect data populating the submission's Details page








# Editors Can Update Co-Author Verification Statuses


- New in v16.0, editors can manually change the verification status of a co-author.
- 'Change' link now available on Author status page in Details

[View Submission](#)  
[Duplicate Submission](#) [Check Details](#) 

**Other Authors:**

-  Casey Coauthor 
-  Marc Savard 

[Author Status](#) 

| Order | Author Name  | Added in Revision | Email Address                                 | ORCID Identifier | Academic Degree(s) | Affiliation | Confirmed?   | Options   |
|-------|--|-------------------|---|------------------|--------------------|-------------|--|---|
| 2     | Casey Coauthor  | R0                | jeffttest47@yahoo.com<br><a href="#">Edit</a> |                  |                    |             | <b>Declined:</b><br>Apr 22, 2019<br><a href="#">Change</a> | <a href="#">Reset Confirmation Status</a><br><a href="#">View Author Details</a><br>Questionnaire Not Completed |

# Editors Can Update Co-Author Verification Statuses

- Available options not chosen by the co-author can be selected
- Editors **cannot** answer co-author questionnaires on their behalf (if configured)



The screenshot shows a dialog box titled "Change Co-Author Verification Status". The dialog box has a dark blue header bar with the title and a close button (X). Below the header, there is a text area with the following text: "To change this co-author's verification status, please select from the choice(s) below and click the 'Save' button. If you want to retain the co-author's current verification status, click the 'Cancel' button." Below the text, there is a radio button labeled "Yes/Confirmed", which is currently selected. A purple arrow points upwards to the radio button. At the bottom of the dialog box, there are two buttons: "Save" and "Cancel".

# Editors Can Update Co-Author Verification Statuses

- New Rolemanager sub-permission for editors
  - Manage Other Authors
    - Edit Other Author E-mail Address
    - Set Other Author Verification Status

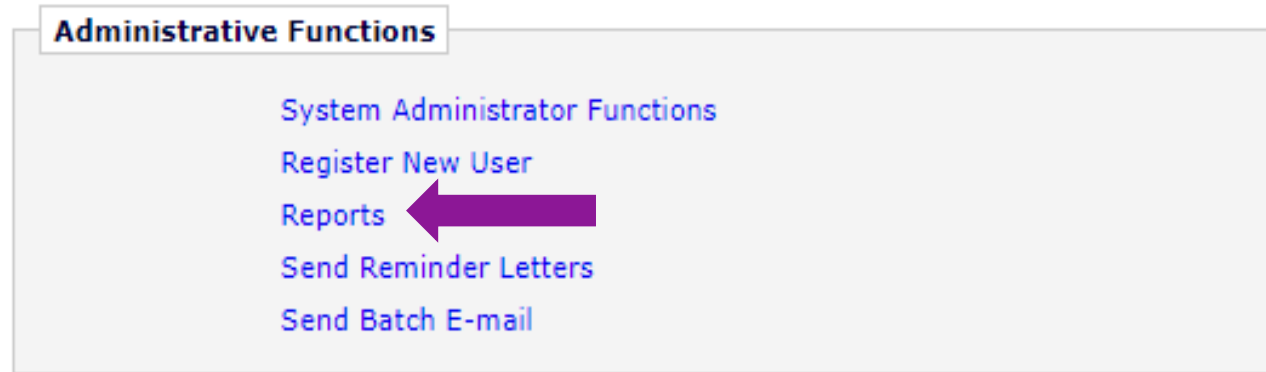


# Existing EM Functionality



# Existing Functionality: Reminder Reports and Where to Find Them

- Bottom of editor main menu
- Must have permission to run reports



## Author Reminder Reports



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

## Reviewer Reports

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

# Existing Functionality: Automated Reviewer Reminder Reports

- Different criteria for reminders

|  |  |
|--|--|
| <b>Reminder Type:</b><br>           | <p><input checked="" type="radio"/> <b>No Response. Send Reminder:</b> Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly <input type="text" value="5"/> days ago. Reminders will be sent to Reviewers who have neither accepted nor declined the review invitation, and have not been un-invited or terminated.</p> <p><input type="radio"/> <b>Reminder Before Due Date:</b> Send an automated reminder e-mail for reviews that are exactly <input type="text" value="10"/> days before their due date. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.</p> <p><input type="radio"/> <b>Reminder Past Due Date:</b> Send an automated reminder e-mail for reviews that are exactly <input type="text" value="7"/> days past the due date. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.</p> <p><input type="radio"/> <b>Reminder Outstanding Partially Saved Reviews:</b> Send an automated reminder e-mail for any partially-saved reviews that were saved exactly <input type="text" value="0"/> days ago and have not been submitted fully. To send reminders for reviews that were saved on the day that the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who saved a partially completed review and may have forgotten to submit the fully completed review.</p> |
| <b>Partially Saved Reviews:</b><br> | <p><input checked="" type="radio"/> <b>Include All Reviewers:</b> Include All Reviewers based on the selected Reminder Type.</p> <p><input type="radio"/> <b>Include Only Reviewers with Partially Saved Reviews:</b> Reminders will be sent only to Reviewers who saved a partially completed review and may have forgotten to submit the fully completed review.</p> <p><input type="radio"/> <b>Exclude All Reviewers with Partially Saved Reviews:</b> Reminders will not be sent to Reviewers who saved a partially completed review and may have forgotten to submit the fully completed review.</p>   |

- Can sort by role, Article Type, Section/Category
- Multiple different reminders can be set

# Existing Functionality:

## Automated Reviewer Reminder Reports: **Permission Note**

- Enabling this permission restricts reminders to the creator of the reminder report
- If you didn't create the report, it won't go out for users tied to your assigned submissions

Restrict Reminder Reports to Assigned Submissions



# Existing Functionality: Other Automated Reminder Reports

- Automated Author Revision Reminder Report
- Automated Author Submission Reminder Report
- Automated Author Invitation Reminder Report
- Automated Submission Task Reminder Report
- Automated Schedule Group Task Reminder Report



# Existing Functionality: Other Automated Reminder Reports

- Remember to configure a letter to go along with your reminder!
- In the author/reviewer/editor/production reminder families



# Existing Functionality: Automated Summary Reminders (For Editors)

- PolicyManager > Configure Automated Summary Reminders
- Can be set up on a role-by-role basis

The screenshot shows a configuration window for 'Editor' with a 'Send Reminders' checkbox checked. The window contains the following fields and options:

- Frequency (Days)\*: 14
- Next Reminder Due: 04/30/2019
- Summary Letter\*: Editor Automated Summary Reminder
- Include Author List:
- Include Abstract:
- Include Folders\*:

|   | Always <i>i</i>                  | Needs Attention <i>i</i>         | Late <i>i</i>         |
|---|----------------------------------|----------------------------------|-----------------------|
| <input checked="" type="checkbox"/> <i>New Invitations</i>                            | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| <input checked="" type="checkbox"/> <i>New Assignments</i>                            | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| <input type="checkbox"/> <i>Submissions with Rescinded Decision</i>                   | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/> |
| <input checked="" type="checkbox"/> <i>Submissions with Required Reviews Complete</i> | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| <input checked="" type="checkbox"/> <i>Submissions Requiring Additional Reviewers</i> | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> <i>Submissions with One or More Late Reviews</i>             | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> <i>Reviewers Invited - No Response</i>                       | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> <i>Submissions Under Review</i>                              | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> <i>Group by Editors I Assigned</i>                           | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> <i>Group by Editor with Current Responsibility</i>           | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> <i>Group by Manuscript Status</i>                            | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/> |

At the bottom, there are two expandable sections:

- + Editor In Chief  Send Reminders
- + Managing Editor  Send Reminders

# Existing Functionality: Automated Summary Reminders (For Editors)

- Merge fields can be used to pull folder summaries into letters
- Can be tracked via Personal Correspondence History
- %EDITOR\_REMINDER\_FOLDER\_SUMMARY%
- %EDITOR\_REMINDER\_SUBMISSION\_LISTS%

| Correspondence Date | Manuscript Number | Letter                            |
|---------------------|-------------------|-----------------------------------|
| 06/11/2019 00:08:13 |                   | Editor Automated Summary Reminder |



Ref.: Ms. No.

DEMO JC Beta Site (CS Site)

Dear Publisher ,

Here is a summary of key folders in your Editorial Manager To-Do list. You have been sent this summary because some of these items may require your attention:

New Invitations 0 ; longest elapsed time 0 days.




New Assignments 1 ; longest elapsed time 264 days.

Submissions with Required Reviews Complete  
1 ; longest elapsed time 43 days.



# Existing Functionality: Warning Thresholds (or Editor Signposts)

- “At a glance” look at deadline maintenance
- Folder by folder basis
- Configurable timelines for each threshold

## Subordinate Editor's Pending Assignments (7)

-  Group by Editors I Assigned
-  Group by Editor with Current Responsibility
-  Group by Manuscript Status

## Submissions with Decisions

- Submissions out for Revision (27)
-  All Submissions with Editor's Decision (21)
- All Submissions with Final Disposition:  
Accept (285), Reject (887), Withdrawn (5), Transfer (0)
-  My Assignments with Decision (6)
- My Assignments with Final Disposition (892)



# Existing Functionality: Warning Thresholds (or Editor Signposts)

- Policymanager > Configure Warning Thresholds
- Folder-by-folder configuration
- Allows for folder prioritization
- Permissions-based

## New Submissions

**Needs Attention:**  Days since initial date submitted  
**Late:**  Days since initial date submitted

## Revised Submissions

**Needs Attention:**  Days since the revision was received  
**Late:**  Days since the revision was received

## New Submissions Requiring Assignment

**Needs Attention:**  Days since initial date submitted  
**Late:**  Days since initial date submitted

## Revised Submissions Requiring Assignment

**Needs Attention:**  Days since the revision was received  
**Late:**  Days since the revision was received

## Direct-To-Editor New Submissions

**Needs Attention:**  Days since initial date submitted  
**Late:**  Days since initial date submitted

# Existing Functionality: People/Submission Flags

- PolicyManager > Create Customized People Flags/Submission Flags
- Choose from dozens of icons
- Each can be assigned a description
- High-level visibility
- Searchable



# Existing Functionality: Searching People/Submission Flags

Choose the criterion for selecting People Records.

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

| Criterion        | Selector    | Value              | User Role |
|------------------|-------------|--------------------|-----------|
| People Flag Name | Is Equal To | Preferred Reviewer | ALL       |
| Last Name        | Begins With |                    | END       |
| Last Name        | Begins With |                    | END       |

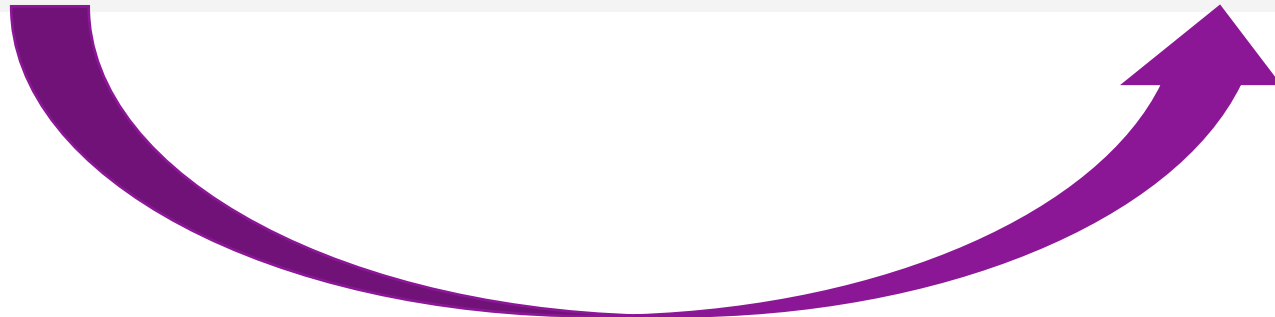
| Merge People             | Name            | City          | State or Province |
|--------------------------|-----------------|---------------|-------------------|
| <input type="checkbox"/> | Charles Critic  |               |                   |
| <input type="checkbox"/> | Chris Botti     |               |                   |
| <input type="checkbox"/> | mary mary, M.D. | North Andover | MA                |
| <input type="checkbox"/> | Matt Cameron    |               |                   |
| <input type="checkbox"/> | Boom Gasper     |               |                   |
| <input type="checkbox"/> | Jeff Christie   |               |                   |
| <input type="checkbox"/> | Olivia Opinion  |               |                   |
| <input type="checkbox"/> | Frank Reynolds  |               |                   |

# Existing Functionality: Tying Submission Flag to Custom Question

- Submission flags can be tied to question responses (PolicyManager > Create Custom Questions)
- Configured response can be tied to flag

Do you have permission from all co-authors?

1  Yes [Associate with Flag](#)



# Existing Functionality: Tying Submission Flag to Custom Question

- Flag will automatically display in action links upon submission

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

Please select a response


Please select a response

Yes

No



**Action**

- View Submission
- Duplicate Submission Check (0%)
- Details 
- Discussions
- History Permission from all co-authors
- Technical Information
- File Inventory
- Edit Submission
- Solicit Commentary
- Classifications
- Unassign Editor
- Invite Reviewers
- Set Final Disposition
- Initiate Production
- Google Scholar Title Search
- PubMed - Title
- Similar Articles in Scopus
- Send E-mail
- Linked Submissions

# Existing Functionality: Editor Decision Phrases

- PolicyManager > Configure Editor Decision Phrases
- Assign to Editor Forms, which are assigned to roles/article types
- Useful for phrases that are constantly entered into **decision letters**

**Current Editor Decision Phrase List**

I'd like to thank you for all your hard work and dedication to this submission; it really shows!

+ Add Editor Decision Phrase

Display Custom Review Questions and Responses Grid

---

**Order**

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

Update Order

# Existing Functionality: Editor Decision Phrases

- Can 'check' to include phrase in decision letter
- Ensure merge field is in decision letter template

## Editor Decision Phrases

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

### Select Phrase

- I'd like to thank you for all your hard work and dedication to this submission; it really shows!

Thank you very much for submitting your manuscript "%ARTICLE\_TITLE%" for review. The reviewers appreciated the attention to an important topic, but they raised substantial concerns about the paper. Based on the reviews, we will not be able to accept this manuscript for publication in the journal.

The reviews are attached, and we hope they may help you should you decide to revise the manuscript for submission elsewhere. Thank you again for thinking of the journal. We will look forward to further contributions from you and your colleagues.

%EDITOR\_DECISION\_PHRASES%

Yours sincerely,




# Existing Functionality: Editor Decision Phrases

- The chosen phrase(s) will populate the merge field:

I'd like to thank you for all your hard work and dedication to this submission; it really shows!

Yours sincerely,

Jeff Christie  
Editor





# Existing Functionality: Custom Merge Fields

- PolicyManager > Define Custom Merge Fields
- Useful for common phrases
- Similar to Editor Decision Phrases, but more versatile

**Name:**

JEFFS\_THANK\_YOU\_TO\_AUTHOR

*Maximum 256 alphanumeric characters and underscores allowed, no spaces*

**Content:**

[Insert Image](#) [Insert Special Character](#)

I'd also like to thank you so much for submitting with our journal; your hard work is greatly appreciated.

[Preview in HTML Format](#)

# Existing Functionality: Custom Merge Fields

- You can insert your custom merge field into a letter template

---

Dear %TITLE% %LAST\_NAME%,

Your submission entitled "%ARTICLE\_TITLE%" has been received by journal %JOURNALFULLTITLE%

You will be able to check on the progress of your paper by logging on to Editorial Manager as an author. The URL is %JOURNAL\_URL%.

Your manuscript will be given a reference number once an Editor has been assigned.

%CUSTOM\_JEFFS\_THANK\_YOU\_TO\_AUTHOR%

Kind regards,

%EDITOR\_NAME%

%EDITOR\_ROLE%

%JOURNALFULLTITLE%



# Existing Functionality: Custom Merge Fields

- Populated letter:

Dear mary,

Your submission entitled "Test Manuscript" has been received by journal DEMO JC Site (CS Site)

You will be able to check on the progress of your paper by logging on to Editorial Manager as an author. The URL is <https://www.editorialmanager.com/DEMOJC/>.

Your manuscript will be given a reference number once an Editor has been assigned.

I'd also like to thank you so much for submitting with our journal; your hard work is greatly appreciated.

Kind regards,




# Existing Functionality: Set “Email From” Address

- Policymanager> Set ‘Email From’ Address
- Choose where automated system emails ‘come from’

|  |   |
|--|---|
| <b>Editorial "E-mail From" Address:</b>  | <input &gt;"="" &lt;trashjo@ariessys.com="" journal\"="" the="" type="text" value="\"/> |
| <b>Production "E-mail From" Address:</b> | <input &gt;"="" &lt;trashjo@ariessys.com="" journal\"="" the="" type="text" value="\"/> |
| <b>Waiver "E-mail From" Address:</b>     | <input type="text" value="The Journal &lt; &gt;"/>                                      |

# Existing Functionality: Set “Email From” Address

- Rogue replies can be caught and handled
- External correspondence can be fwd'd to Dropbox

**Date:** Jun 13, 2019  
**To:** "mary mary" trash53@aries.com  
**From:**  "The Journal" trashjo@ariessys.com  
**Subject:** Your PDF Test Manuscript has been built and requires approval

---

Dear mary,

The PDF for your submission, "Test Manuscript" is ready for viewing.

This is an automatic email sent when your PDF is built. You may have already viewed and approved your PDF while on-line, in which case you do not need to return to view and approve the submission

# Effective Communication In Editorial Manager: Final Thoughts

- Stay in the loop! Check release notes
- Ask your account coordinator for suggestions
- Site Audit-(ask your AC)
- Suggest items for the EM wishlist

# Questions?



# Thank you!

Enjoy the rest of your day at EMUG 2019!

