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# Welcome to the 16TH Annual **EMUG** **BOSTON**

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## #EMUG2018

 Editorial Manager®  ProduXion Manager®

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# How to Train your Editors

Tips on how to get Editors up to speed on EM features

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# Agenda

- Training Editors with different roles
- Main Menus
- Instructions for Editors – Reviewer Selection, Editor Forms and Emails
- Editor Decisions – Limit Permissions by Decision Term and Role
- Configurations:
  - Editor Forms & Reviewer Selection Instructions
  - Editing Letter Templates using the correct deep-links and Detailed Instructions
  - Create Details Page for Each Role
  - Decision Terms – Permissions to Notify Author by Term and Role
  - Warning Signposts and Thresholds
  - Automated Editor Reminders
- Questions and Comments

# Training Editors with different Roles

- EIC, Editor, Associate Editor, etc.
- Limited Permissions are recommended
  - Associate Editor Main Menu and Inviting Reviewers
  - EIC Main Menu and Permissions
- Limiting the ability to notify author of the decision by decision term and role

# Editor Forms & Reviewer Selection Instructions

- Configured in PolicyManager
  - Reviewer and Editor Form Polices>Create Editor Forms
  - Reviewer and Editor Form Polices>Configure Editor Forms
- General Policies>Customize Reviewer Selection Summary Instructions

# Editing Letter Templates and using the correct Deep Links

- Configured in PolicyManager
  - General Polices>Set Editor Deep Link Expiration
  - E-Mail and Letter Policies>Edit Letters
    - Editor Assignment Letters
    - Editor Notification Letters
    - Editor Automated Summary Reminder Letters

# Details Page

- Configured in PolicyManager and RoleManger
  - General Polices>Define Details Page Layouts
    - Copy and Create a New layout or Edit a Layout
  - RoleManager>Editor Roles>Edit an Editor Role(s)

# Editor Decisions – Limit Permissions by Decision Term and Role

- Configured in RoleManager
  - RoleManager>Editor Roles>Edit an Editor Role(s)



# Warning Signposts and Thresholds

- Configured in PolicyManager and RoleManager
  - General Policies>Configure Warning Thresholds
  - RoleManager>Editor Roles>Edit an Editor Role(s)

# Automated Editor Reminders

- Configured in PolicyManager
  - Editor Assignment Policies > Configure Automated Summary Reminders
    - Each role can be configured differently

# Questions and Comments

Thank You!

