Underused Features

Betsy Hopkins
Senior Project Manager
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Agenda

• Administrative Features
• Submission Features
• Editorial Features
• Flags!
• A Few More
Administrative Features
Update Banner Links

- Check your links regularly!

Update these links here:
PolicyManager → Edit Banner URLs
Update Banner Links

Edit Banner URLs

The following items on the Editorial Manager menu bar link to distinct URLs, possibly external to Editorial Manager. If the field is blank, your journal is currently linking to the default Editorial Manager pages. If you wish to link to an external URL (e.g., your journal’s home site), please enter the complete URL (e.g., http://www.myjournal.com/ContactUs.html) in the text box provided.

- Instructions For Authors: http://www.asrt.org
- Contact Us: ContactUs.html
- Journal Overview: http://www.google.com

[Submit] [Cancel]
Update Main Pages

• Check your links regularly!
• Update instructions
• Review the information
• Contact your Account Coordinator for assistance
Update Your Letters!

• Recent security updates in Editorial Manager changed the `%PASSWORD%` merge field functionality
• Check the wording on your letters for accuracy

Ref.: Ms. No. EMDEMO-D-17-00014
Demonstration of Passwords
EM Demo Site

Dear Ms. Author,

You have been invited to review the above referenced submission.

https://editorialmanager.com/emdemo
username: Name
password: Password

Ref.: Ms. No. EMDEMO-D-17-00014
Demonstration of Passwords
EM Demo Site

Dear Ms. Author,

You have been invited to review the above referenced submission.

https://editorialmanager.com/emdemo
username: Name
password: available at this link
Update Your Letters!

Letter Body:

Dear %TITLE% %LAST_NAME%,

You have been invited to review a manuscript for %JOURNALFULLTITLE%.

I would be grateful if you would review a paper entitled "%ARTICLE_TITLE%" for this journal.

Update letters here:
PolicyManager → E-mail and Letter Policies → Edit Letters → Select the letter
Update Merge Fields

• Search
• View description
Custom Merge Fields

Allow sender to add Rich Text (HTML) formatting

Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

Letter Body:

Dear %TITLE% %LAST_NAME%,

You have been invited to review a manuscript for %JOURNALFULLTITLE%.

I would be grateful if you would review a paper entitled "%ARTICLE_TITLE%" for this journal.
Custom Merge Fields

• Use Custom Merge Fields for frequently updated information
• Add Images that display in HTML letters
Custom Merge Fields

Create Custom Merge Fields here:
PolicyManager → E-mail and Letter Policies → Define Custom Merge Fields
Add External Correspondence

- Add external correspondence to History
- Can be a record of a phone call
Add External Editorial Correspondence

Items marked with an asterisk are required. The 'Correspondence Date' and 'Description' fields will be listed on the History page. Paste or type any desired text into the 'Letter Body' area, but note that any formatting will be lost. Click 'Open in New Window' if you need extra space to edit the correspondence.

Note: Please check the text for any sensitive information that should be removed or obscured (such as passwords or names of reviewers), as the system cannot automatically anonymize correspondence you add manually. Correspondence where you enable the 'Display in Author's Correspondence History' checkbox can be viewed by the author if your publication allows this.

Display In Author's Correspondence History

* Correspondence Date: 01/08/2018 (mm/dd/yyyy)  
  Time: Hour: 05  Minute AM/PM: 12  PM  U.S. Eastern Time

* Description: Letter regarding EEMUG Prep

From: Aries Marketing

To: B. Hopkins

Letter Subject: Are you ready for EEMUG?

Attachments: Add/Change Attachments

Letter Contents: 

Open in New Window
Add External Correspondence

Configure permission:
RoleManager ➔ Select Editor Role ➔ General Searching and Viewing
Create an E-mail Drop Box

• Creates an e-mail address for use by Editors
  • Be selective who gets this address

• When configured, correspondence sent from EM (related to a submission) will have an EMID

• WHAT IS AN EMID?
  • Used to link external e-mail to EM submission
  • Must have EMID in subject line to be properly ingested

You have a new Editor Assignment - [EMID:47b90ea3ee0ca4f5]
Create an E-mail Drop Box

Configure Drop Box Address here:
PolicyManager → E-mail and Letter Policies → Configure Email Import

Configure Email Import

A user who receives replies, outside the system, to system-generated Emails may add them to the appropriate Correspondence History by forwarding them to the 'Drop-Box' address displayed below, once submitted.

If you generate and submit a new address, any previous address is made inactive and cannot be used again (this allows you to retire an address that has become a target for spam Emails). Clear the address and submit the page to turn off the ability to import mail into the publication.

You must submit this page for any changes to the Drop-Box Address to take effect. You should inform anyone who forwards mail in this way immediately of any changes to this address.

Set 'Drop-Box' Email Address:
em.demo@bh102-6582447cdc8487bf@editorialmanager.com

Generate New Address  Clear Address
Create an E-mail Drop Box

-----Original Message-----
From: Betsy Hopkins <bhopkins@ariessys.com>
Sent: Wednesday, Jan 8, 2014 12:04 PM
To: Mary Smith <msmithtrash@ariessys.com>
Subject: RE: You have a new Editor Assignment - [EMID:47b90ca3ee0ca4f5]

Spoke with Ronny Reviewer today. Can you please extend his deadline by one week?

-BH

-----Original Message-----
From: em.demohh150.0.5bdeba.14a1e337@editorialmanager.com [mailto:em.demohh150.0.5bdeba.14a1e337@editorialmanager.com] On Behalf Of Betsy 11.0
Sent: Wednesday, Jan 1, 2014 12:04 PM
To: Betsy Hopkins <bhopkins@ariessys.com>
Subject: You have a new Editor Assignment - [EMID:47b90ca3ee0ca4f5]

Ref.: Ma. No. DEMO-100-85
Create an E-mail Drop Box

<table>
<thead>
<tr>
<th>Correspondence Date</th>
<th>Correspondence Type</th>
<th>Recipient</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 8 2014 12:28PM</td>
<td>Imported E-mail (External)</td>
<td>Buzz Aldrin</td>
<td>Received by Journal</td>
</tr>
<tr>
<td>Jan 8 2014 10:56AM</td>
<td>Attachments to Author</td>
<td>Buzz Aldrin</td>
<td>Received by Journal</td>
</tr>
<tr>
<td>Jan 8 2014 10:33AM</td>
<td>Attachments to Author</td>
<td>Buzz Aldrin</td>
<td>Received by Journal</td>
</tr>
<tr>
<td>Sep 18 2013 2:25PM</td>
<td>Editor Notice Author Approve Changes</td>
<td>Sally Editor</td>
<td>Received by Journal</td>
</tr>
<tr>
<td>Sep 18 2013 2:24PM</td>
<td>Author - return submission</td>
<td>Buzz Aldrin</td>
<td>Sent Back to Author</td>
</tr>
</tbody>
</table>
Submission Features
Update Submission Instructions

• New Submission Interface available in version 14.1
• New Submission Interface will be turned on for everybody with 15.0 upgrade
• Update your Submission Instructions now!
Update Submission Instructions

Instruction fields can be customized
Update Submission Instructions

Configure New Instructions:
PolicyManager \(\rightarrow\) Submission Policies \(\rightarrow\) Edit Manuscript Submission Instructions

Review Old Instructions:
PolicyManager \(\rightarrow\) Submission Policies \(\rightarrow\) Edit Legacy Manuscript Submission Instructions
External File Type

- Think about the URL feature for larger file sets
- Set to Optional or Required
External File Type

Configure here:

PolicyManager ➔ Submission Policies ➔ Edit Submission Items
Author and Submission Questionnaires

• Submission Questionnaire:
  • Displayed only to Author when submitting manuscript

• Author Questionnaire:
  • Displayed to Author when submitting manuscript
  • Also displayed to Co-Authors when using Co-Author Verification

• Gather information from Authors that can be used for reporting
Author and Submission Questionnaires

• Displayed on Additional Information Submission step
• Questions can request answers in many forms
Questionnaires

• Text
• Date
• Integer
• Decimal
• Notes
• Lists
Author and Submission Questionnaires

- Drop Down List
- Checkbox List
- Radio Button List
- Selector Box List
Questionnaires – Follow-on Questions

• You can also configure a follow-on question, or series of questions

Q 1

Q 2
Did you or your institution at any time receive payment or services from a third party for any aspect of the submitted work (including but not limited to grants, data monitoring board, study design, manuscript preparation, statistical analysis, etc...)?

Yes

Was it for a:

- Grant
- Consulting Fee
- Support for travel
- Payment for writing or reviewing the manuscript

Select All  Clear All

Please provide a description of the support received:

Character Count: 0

Limit 20000 characters
Author and Submission Questionnaires

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

Configure Questions:
PolicyManager → Questionnaire Policies → Create Custom Questions
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.

If a Custom Question response is associated with a Submission Flag, the Flag will be automatically set if this response is selected or entered by an Author. **NOTE:** This only applies if the question is included on a Submission questionnaire. If the question appears on an Author or Production questionnaire, the flag will not be set.

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.

<table>
<thead>
<tr>
<th>Response Type</th>
<th>Maximum Field Length (1-200):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td></td>
</tr>
</tbody>
</table>

Flag

- None
- Associate with Flag
- Associate with Flag
Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote

Custom Metadata ID:

Select Custom Metadata ID

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

PDF Cover Page

- Display

Manuscript Details

- Display
- Help Text:

Transmittal Form

- Display
- Editable
- Required
- Help Text:
Author and Submission Questionnaires

Configure Questions:
PolicyManager → Questionnaire Policies → Create Questionnaires
**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. Click the 'Remove' link to remove questions from the questionnaire.

Questions that are hidden are displayed in grey text. For multi-part questions, only the Custom Metadata ID associated with the Initial Question is displayed.

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:** EEMUG Questionnaire

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

**Question Display Order:**

<table>
<thead>
<tr>
<th>Order</th>
<th>Question</th>
<th>Custom Metadata ID</th>
<th>Required</th>
<th>Include in Merge Field</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Have you previously submitted your talk to a journal for publication?</td>
<td></td>
<td></td>
<td></td>
<td>Remove</td>
</tr>
<tr>
<td>2</td>
<td>Did you follow all submission instructions?</td>
<td></td>
<td></td>
<td></td>
<td>Remove</td>
</tr>
<tr>
<td>3</td>
<td>Is this a question?</td>
<td></td>
<td></td>
<td></td>
<td>Remove</td>
</tr>
</tbody>
</table>

[Update Item Order]

[Add Custom Questions]

[Cancel] [Save]
# Author and Submission Questionnaires

Configure Questions:
PolicyManager → Submission Policies → Edit Article Type
CRediT Contributor Roles

- Conceptualization
- Data curation
- Formal analysis
- Funding acquisition
- Investigation
- Methodology
- Project administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing – original draft
- Writing – review & editing

Enter Author Details

Title
Given/First Name*
Middle Name
Family/Last Name*
Academic Degree(s)
Affiliation
E-mail Address
ORCID
What is ORCID?
Institution
Department
Street Address
City
State*
Zip or Postal Code
Country
Contributor Roles
This is the corresponding author

Insert Special Characters
Fetch

Click here to select roles
Enable the feature here:
PolicyManager ➔
Configure Contributor Roles
CRediT Contributor Roles

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. (more...)

Configure it to “Display”:
PolicyManager → Set Other Author Parameters
Configure it as Optional or Required for Article Types:

PolicyManager → Configure Article Types
Capture Funding Information

- Collect grant funding information from your Authors
- Funding Institution Names are standardized using the CrossRef Funder Registry
Capture Funding Information

Configure the feature here:
PolicyManager ➔ Submission Policies ➔ Edit Article Types
Set as Optional or Required
Editorial Features
Additional Manuscript Details (AMDs)

- Define custom fields to associate with submissions
- Can be used for capturing additional information, such as identifying candidates for fast track publication
Additional Manuscript Details (AMDs)

Configure the feature here:
- PolicyManager ➔
- Additional Data Policies ➔
- Add/Edit Additional Manuscript Detail Fields
<table>
<thead>
<tr>
<th>Page</th>
<th>Hide</th>
<th>Editable</th>
<th>Required</th>
<th>Help Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Manuscript Details</td>
<td></td>
<td></td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Manuscript Details</td>
<td></td>
<td></td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Transmittal Form</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom Metadata ID:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select Custom Metadata ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display for Invited Submissions</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Search Submission</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Search Proposal</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Schedule Group TOC</td>
<td></td>
<td></td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Editor Chains and Alternates

- Assign multiple Editors at the same time
- Create chain templates and associate them with different Article Types
Editor Chains and Alternates

- Swap Editors mid-chain by clicking Unassign Editor link
Editor Chains and Alternates

Enable the feature here:
PolicyManager → Define Editor Assignment Chain Templates
Editor Chains and Alternates

Enable the feature here:
PolicyManager → Edit Article Types
Custom Review Questions

• More useful than Manuscript Rating Questions
• Gather information for Reporting
• Display on Editor Form
• Can be included in merge fields
Custom Review Questions

Are the conclusions valid from the data presented?

No

(Limit 250 Characters)

Character Count: 0

Please detail any logical fallacies or misleading statistics used in this study. (Limit 18000 Characters)

None

Character Count: 4

*Is this manuscript a candidate for fast-tracking?

Yes
Custom Review Questions

- Create/Edit Custom Review Questions
- Create/Edit Review Forms
- Match Review Forms to Article Types and Reviewer Roles

Configure the feature here:
PolicyManager → Reviewer and Editor Form Policies → Reviewer Recommendation Policies section
Instructions for Reviewers

- Customize the instructions
- Display on the page or as a popup

![Edit Review Form](https://via.placeholder.com/150)

- **Display Reviewer Instructions in popup**
Instructions for Reviewers

Demonstration for EEMUG 2018

Original Submission
Robert Reviewer (Reviewer 2)

Recommendation: No Recommendation  Overall Manuscript Rating (1-100):  

Cancel  Save & Submit Later  Upload Reviewer Attachments  Proof & Print  Proceed

Reviewer Instructions

Instructions
Configurable text:
Instructions appear here....
Flags!
Flags

• So many flags, so little time….
• Custom Flags
  • Submissions
  • People
  • Schedule Group (ProduXion Manager)
• Configured in PolicyManager

Create Customized Submission Flags
Create Customized People Flags
Create Customized Schedule Group Flags
Custom Submission Flags

• Publications may configure their own flags for any number of uses
• Flags are set (turned on) on the ‘Submission Flags’ pop-up page, accessible from the ‘Details’ pages and flag next to Details link
• When on, flags are displayed next to the Details link in the Action column, and also on the Details page
• Submission Flags are visible to Editor or Publisher roles (by permission)
Custom Submission Flags

Add Customized Submission Flag

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On Submission Flags' and 'Turn Off Submission Flags' can display/turn off Submission Flags for any manuscript on the Submission Flags page (accessible from the Details page). The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both.

If you associate this Flag with an Additional Manuscript Details (AMD) field, these Editors and Publishers can also display/turn off this Flag on pages containing that AMD field. If a Flag is associated with a Custom Question Response, it cannot be associated with an AMD field.

When a flag is attached to a submission, it will be displayed next to the 'Details' action link on all pages where the 'Details' link is displayed (Editor and Publisher Roles must have permission to 'View Submission Flags').

Flag Icon: Open Special Character Palette
Flag Name: Maximum 256 characters
Flag Type:
- Editorial
- Production
Associate with AMD Field:
- None
Associated with Custom Question? No
Display in History: When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.

!!!!! ## # # # # # $ $ $ $ $ $ $ $ $ $ 
% % % % % % & & & & & & & & & & & & & & &
Custom Submission Flags

OVER 900 FLAGS

PLUS 500 MORE

FOR PM!
Custom Submission Flags

Add Customized Submission Flag

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On Submission Flags' and 'Turn Off Submission Flags' can display/turn off Submission Flags for any manuscript on the Submission Flags page (accessible from the Details page). The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both.

If you associate this Flag with an Additional Manuscript Details (AMD) field, these Editors and Publishers can also display/turn off this Flag on pages containing that AMD field. If a Flag is associated with a Custom Question Response, it cannot be associated with an AMD field.

When a flag is attached to a submission, it will be displayed next to the 'Details' action link on all pages where the 'Details' link is displayed (Editor and Publisher Roles must have permission to 'View Submission Flags').

Flag Icon: Open Special Character Palette
Flag Name: Maximum 256 characters
Flag Type: Editorial, Production
Associate with AMD Field: None
Associated with Custom Question? No
Display in History: When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.

! ! ! ! ! ! ! ! # # # # # $ $ $ $ $ $ $ $ $ $ % % % % % % & & & & & & & & & &
Custom Submission Flags

Create Customized Submission Flags

Submission Flags can be attached to submission records on the Submission Flags page (accessible from the 'Details' page), or by clicking on the flag icon on any page where Submission Flags are displayed. Users with permission to 'Turn On Submission Flags' can also set flags by clicking the 'Set Flag' icon ☑. When a flag is displayed for a submission, it is visible to Editors and Publishers (with appropriate RoleManager permission) on all pages where the 'Details' action link is displayed. For sites using Production Tracking, Submission Flags are also displayed next to the 'Production Details' action link. The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both. If a flag is associated with a specific Additional Manuscript Details (AMD) field, the option to attach or remove the flag displays next to the associated AMD field.

<table>
<thead>
<tr>
<th>Order</th>
<th>Flag Name</th>
<th>Flag Type</th>
<th>Associated With Custom Question</th>
<th>Associated With AMD</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Expedited</td>
<td>Editorial and Production</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Transferred</td>
<td>Editorial</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Supplement Article Possibility</td>
<td>Editorial and Production</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Fast Track
  - Remove Edit
- Press Release Candidate
  - Remove Edit
Custom Submission Flags

## Add/Edit Additional Manuscript Detail Fields

Listed below are the Additional Manuscript Detail Fields added for your journal. The values for these fields are entered manually on the Additional Manuscript Details page or the Transmittal Form, or can also be added to Custom Details Page layouts. If a Custom Flag has been configured to be Associated with an Additional Manuscript Detail field, an option to turn that Flag on or off will also appear next to the field.

<table>
<thead>
<tr>
<th>Order</th>
<th>Description</th>
<th>Associated with Flag</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Fast Track</td>
<td>▼ Expedited</td>
<td>Remove</td>
</tr>
<tr>
<td>2</td>
<td>Press Release Candidate</td>
<td>* Supplement Article Possibility</td>
<td>Remove</td>
</tr>
</tbody>
</table>
Custom Submission Flags

Add Customized Submission Flag

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On Submission Flags' and 'Turn Off Submission Flags' can display/turn off Submission Flags for any manuscript on the Submission Flags page (accessible from the Details page). The Flag Type indicates whether a particular Flag is displayed on the editorial or production side of the system, or both.

If you associate this Flag with an Additional Manuscript Details (AMD) field, these Editors and Publishers can also display/turn off this Flag on pages containing that AMD field. If a Flag is associated with a Custom Question Response, it cannot be associated with an AMD field.

When a Flag is attached to a submission, it will be displayed next to the 'Details' action link on all pages where the 'Details' link is displayed (Editor and Publisher Roles must have permission to 'View Submission Flags').

Flag Icon: Open Special Character Palette
Flag Name: Maximum 256 characters
Flag Type: Editorial
Flag Type: Production
Associate with AMD Field: None
Associated with Custom Question? No

Display in History: When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.

! ! ! ! ! ! ! ! # # # # # $ $ $ $ $ $ $ $ $ $ $ % % % % % % & & & & & & & & & & & & & & & & & & & & & & & & &
• Associate a Custom Submission flag with a custom Submission Question’s response
Custom Submission Flags

- Flag will display next to Details link
- Flag will display next to answer on Details page
Custom People Flags

• Publications may configure their own flags for any number of uses
• Flags are set (turned on) on the ‘People Flags’ pop-up page, accessible from the Flag icon next to people names
• People Flags are visible to Editor or Publisher roles (by permission)
Custom People Flags

- People Flags and Submission Flags use the same set of flags, so it can be used for one or the other.
Search by Flag Name

Search People

Choose the criterion for selecting People Records.

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Selector</th>
<th>Value</th>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>People Flag Name</td>
<td>Is Equal To</td>
<td>People Flag #1</td>
<td>END</td>
</tr>
<tr>
<td>Last Name</td>
<td>Begins With</td>
<td></td>
<td>END</td>
</tr>
<tr>
<td>Last Name</td>
<td>Begins With</td>
<td></td>
<td>END</td>
</tr>
</tbody>
</table>

Clear  Search
## Search by Flag Name

### Search submissions selection criteria

- **Display search results in PowerGrid**

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

- **Search Definition:** Choose Saved Search

<table>
<thead>
<tr>
<th>Help with Searching</th>
<th>Insert Special Character</th>
<th>Value Options</th>
<th>Advanced Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>(</td>
<td>Criterion</td>
<td>Is/Is not</td>
<td>Selector</td>
</tr>
<tr>
<td>Submission Flag Name</td>
<td></td>
<td>Is</td>
<td>Equal To</td>
</tr>
</tbody>
</table>

**Advanced Criteria**

[Aries Systems](https://www.ariesystems.com)
And a few more....
Detailed People Notes

- Allow Editors to use Detailed People Notes for further information on when a note was added and who added it.
Detailed People Notes

- Choose to display at the top of the People – Update Information page
Detailed People Notes

- View Detailed People notes when inviting Reviewers (must have ‘Detailed People Notes’ available as Search Criterion in RoleManager)
Detailed People Notes

- View Detailed People notes when inviting Reviewers (must have ‘Detailed People Notes’ available as Search Criterion in RoleManager)

<table>
<thead>
<tr>
<th>Select As</th>
<th>Inv.</th>
<th>Asn.</th>
<th>Alt.</th>
<th>Prop.</th>
<th>Reviewer Name</th>
<th>Board Member</th>
<th>Classifications</th>
<th>Reviewer Statistics (Agreed Invitations)</th>
<th>Invitation Statistics</th>
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<td>Buzz Aldrin</td>
<td>No</td>
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<td>Reviews in Progress: 0</td>
<td>Date Last Invited: Mar 17 2016 10:17AM</td>
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<td>(Reviewer)</td>
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<td>Completed Reviews: 1</td>
<td>Outstanding Invitations: 0</td>
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<td>Un-assigned After Agreeing: 0</td>
<td>Agreed: 1</td>
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<td>Last Review Declined: 0</td>
<td>Total Invitations: 1</td>
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<td>Avg Days Outstanding: 0</td>
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<td>Manuscript Rating: 0</td>
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<td>Avg Review Rating: 0.0</td>
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**Detailed People Notes**

- Mary François Smith, PhD
  - Adding a second note for display purposes.
  - Dec 29 2017 03:09PM
- Mary François Smith, PhD
  - Adding a detailed people note to this user.
  - Dec 28 2017 11:53AM
Detailed People Notes

Enable permission here:
RoleManager → Select Editor Role → Viewing and Editing People Data section
Enable in Reviewer Search here:
RoleManager → Select Editor Role → Reviewer Search Criterion
Detailed People Notes – People Sharing

- Publications in a People-Sharing Group can share Detailed People Notes
- When shared, notes can be filtered by publication

<table>
<thead>
<tr>
<th>Publication</th>
<th>Operator</th>
<th>Note</th>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>IJRSDEV121c</td>
<td>Suzie Snowflake</td>
<td>As President of the Jeff Fan Club (Official), I offer a counterpoint: JEFF IS (more...)</td>
<td>Jun 25 2015 05:38AM</td>
<td></td>
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<tr>
<td>IJRSDEV121b</td>
<td>Luke G. Shepherd, MD</td>
<td>He's just a mediocre guy, living his life.</td>
<td>Jun 25 2015 05:33AM</td>
<td></td>
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<td>IJRSDEV121a</td>
<td>Mary A. Managing</td>
<td>Jeff kind of knows what he's doing.</td>
<td>Jun 25 2015 05:29AM</td>
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</tr>
</tbody>
</table>
Detailed People Notes – People Sharing

Enable the feature here:
RoleManager ➔ Select Editor Role ➔ Viewing and Editing People Data section
Similarity Check

• Similarity Check powered by iThenticate from CrossRef

• Configure files to automatically go to iThenticate for similarity check (based on Article Type configuration):
  • On Initial Submission
  • On First Revision
  • On Final Disposition of Accept

• View results from folders such as:
  • New Submissions
  • Revised Submissions
# Similarity Check

<table>
<thead>
<tr>
<th>Action</th>
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<tbody>
<tr>
<td>View Submission</td>
</tr>
<tr>
<td>View QC Results</td>
</tr>
<tr>
<td>Similarity Check/Thenticate Results (57%)</td>
</tr>
<tr>
<td>Duplicate Submission Check (21%)</td>
</tr>
<tr>
<td>Details</td>
</tr>
<tr>
<td>Initiate Discussion</td>
</tr>
<tr>
<td>History</td>
</tr>
<tr>
<td>Technical Information</td>
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<tr>
<td>File Inventory</td>
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<tr>
<td>Edit Submission</td>
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<tr>
<td>Solicit Commentary</td>
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<td>Classifications</td>
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<td>Unassign Editor</td>
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<tr>
<td>Notify Editor</td>
</tr>
<tr>
<td>Invite Reviewers</td>
</tr>
<tr>
<td>Set Final Disposition</td>
</tr>
<tr>
<td>Initiate Production</td>
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<td>Similar Articles in MEDLINE</td>
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<tr>
<td>Google Scholar Title Search</td>
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<td>Google Title Search</td>
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<td>Google Scholar Author Search</td>
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<tr>
<td>Send E-mail</td>
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<td>Linked Submissions</td>
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<table>
<thead>
<tr>
<th>Manuscript Number</th>
<th>DOI</th>
<th>Author Name</th>
<th>Article Title</th>
<th>Article Type</th>
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<tbody>
<tr>
<td>WEBDEM-D-15-00003</td>
<td></td>
<td>Tom Smith P</td>
<td>EEMUG 2017 Demonstration</td>
<td>Original Study</td>
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</tbody>
</table>

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**Similarity Check Status Summary:**

- % = highest similarity score
- .. = a similarity check is in process
- X = a similarity check could not be processed

**Action Links**

- WEBDEM-D-12-00008R2 | Original Study | **Action Links**

**Aries systems**
Similarity Check

• NOTE: You do need an account with CrossRef before this feature can be enabled. [https://www.crossref.org/services/similarity-check/](https://www.crossref.org/services/similarity-check/)

  Configure Duplicate Submission Check
  Configure Technical Check
  Configure Similarity Check
  Configure checkCIF

• Configure Similarity Score for your publication

• Configure any role permission to view

  Configure the feature here:
  
  PolicyManager → Submission Policies → Configure Similarity Check
Search Submissions – Publisher Role

- Allow Publisher Roles to Search Submissions
- Added by popular demand, so make sure you take advantage of it!
Search Submissions – Publisher Role

Enable the feature here:
RoleManager ➔ Select Publisher Role ➔ Search Submissions