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EMUG 2023



Courtyard Boston Downtown Hotel
June 14-15, 2023

Aries
systems.



EMUG 2023

Configuration Consultation & Underused Features

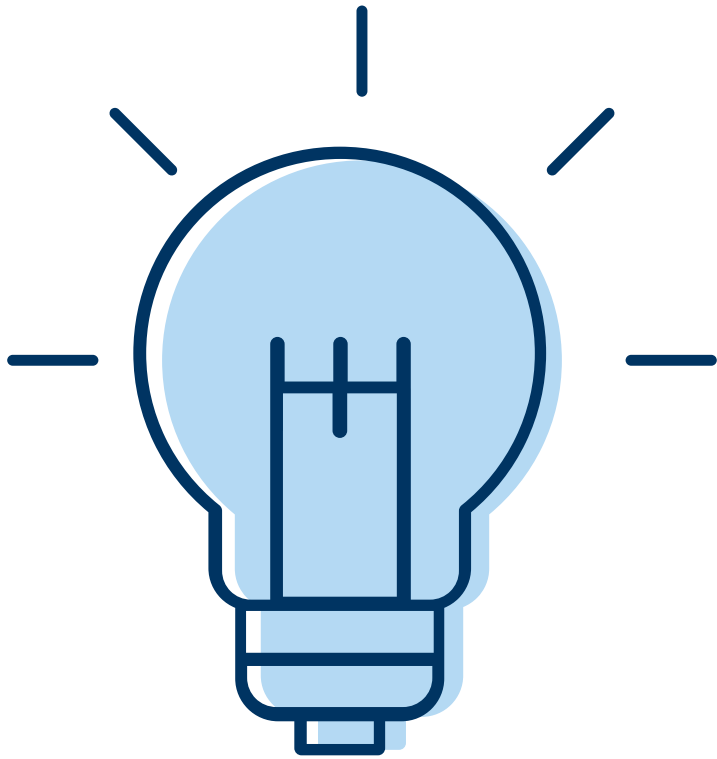
The Aries Client Services Team

Agenda

Welcome to
EMUG: Day 2

- Underused Features
- Site Audits
- Questions
 - Workflow
 - Configurations
 - Anything we can assist with!





Underused Features

Underused Features

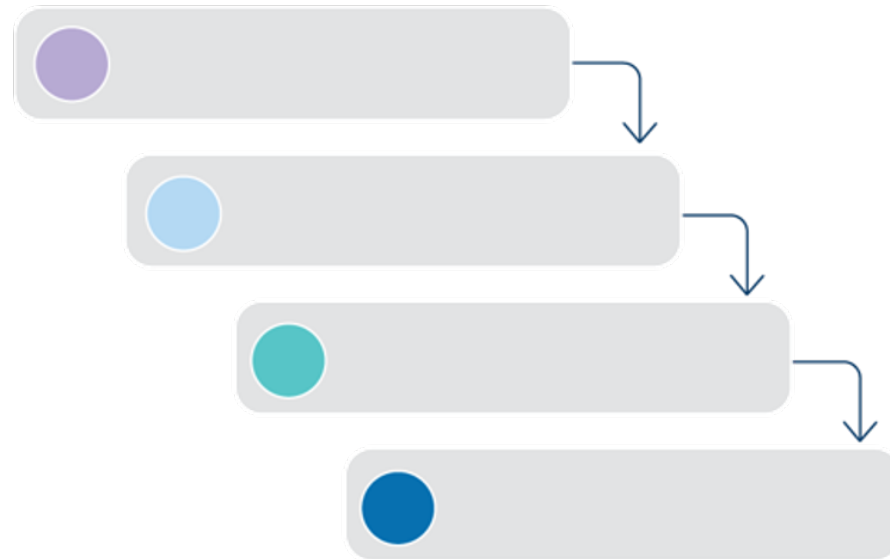
- Required Reviews Reset
- Default Revision Letter Templates for Reviewers
- Editor Chain Templates
- Comments to Author Text Box – Reviewer comments appear on the Editor Decision Form
- Merge Fields for comments
- Review Questions and Responses Grid on Editor Decision Form
- Merge Fields for Review Questions and Responses
- Detailed People Notes
- Assign Reviewer Number when Review is submitted
- Restricted File Types
- URL Submission Items



Required Reviews Reset

Underused Features

- Change status from 'Required Reviews Complete' to 'Under Review'
- Automatically moves submission to the correct folder(s)



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Required Reviews Reset

Submissions with Required Reviews Complete - Steven Gain

Contents: New and revised manuscripts that have the number of required reviews completed. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Make a Decision. Use the up/down arrows to change the sort order.

Page: 1 of 1 (1 total submissions)

Display 10 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Review Status
View Submission Details Initiate Discussion History File Inventory Edit Submission Classifications Assign Editor Unassign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Set Final Disposition Initiate Production Submit Editor's Decision and Comments Send E-mail Linked Submissions	DEMOSGG-00018	EMUG 2017		Underused Features	Scott Farmer	05/22/2017	05/22/2017	Required Reviews Completed	2 Complete (more...)

Page: 1 of 1 (1 total submissions)

Display 10 results per page.



Required Reviews Reset

Reviewer Selection Summary - Submission DEMOSGG-00018

Scott Farmer
Underused Features

Reviewer Search

Search My Publication

Search for Reviewers

from

All Reviewers

Go

Review Settings

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 3 [\[Change\]](#) review(s) have been completed.

Automatically un-invite Reviewers who do not respond to an invitation within 0 [\[Change\]](#) day(s). [\(more...\)](#)

Automatically un-assign Reviewers who do not complete a review within 0 [\[Change\]](#) day(s) of the review due date. [\(more...\)](#)



Required Reviews Reset

Submissions Requiring Additional Reviewers - Steven Gain

Contents: New and revised submissions requiring additional Reviewers as defined by the publication. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Make 3) Allow current Reviewers to complete their work. Use the up/down arrows to change the sort order.

Page: 1 of 1 (1 total submissions)

Display 10 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Review Status
View Submission Details Initiate Discussion History File Inventory Edit Submission Classifications Assign Editor Unassign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Set Final Disposition Initiate Production Submit Editor's Decision and Comments Send E-mail Linked Submissions	DEMOSGG-00018	EMUG 2017		Underused Features	Scott Farmer	05/22/2017	05/22/2017	Under Review	2 Complete (more...)

Page: 1 of 1 (1 total submissions)

Display 10 results per page.



Required Reviews Reset

- ActionManager > Document Status

Reviewer Assigned			
Event	New Document Status	Warnings	Alternative Text for Authors
Request Unregistered Reviewer	No Change		
Reviewer Invited	Under Review ▼		
Reviewer Assigned (Not Invited)	Under Review ▼		
Reviewer Agree	Under Review ▼		
Reviewer Decline	No Change		
Review Due Date Changed	No Change		
Un-invite Reviewers Before Agreeing to Review	No Change		
Un-assign Reviewers After Agreeing to Review	No Change		
Promote Alternate Reviewers	Under Review ▼		
Re-open Review	No Change		
Review Assignment Completed	No Change		
Required Reviews Complete	Required Reviews Completed ▼		Under Review
Required Reviews Reset	Under Review ▼		



Default Revision Letters for Reviewers

Underused Features

- Templates for new Reviewers and previous Reviewers
- Available for Reviewer Invited, Reviewer Assigned, Reviewer Agree
- Agree and Promote Alternate Reviewer Events in ActionManager

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Default Revision Letters

Select Reviewers - Confirm Selection and Customize Letters Submission DEMOSGG-00018R1 Scott Farmer "Underused Features"

You have selected the following people as potential Reviewers ([more...](#))

Previously Submitted Reviews

The following reviews have been submitted. You may include a copy of each review in invitations to new Reviewers by clicking the checkbox. To see the review, click the Reviewer's name. Customize each letter to edit the review text that will be seen by the Invited Reviewer, but note that customizing a letter creates a fixed copy of that letter that is not affected by subsequent changes to your selections.

Please select any previously submitted reviews for inclusion before customizing invitation letters.

Current Submission

- Wetsel Amy, PhD, MBA (Original)
- Doug Baldwin (Original)

Reviewers to Invite

Name	Letter	Days to Review	Do Not Invite
Wetsel Amy, PhD, MBA (Reviewer)	Reviewer Invitation on Revision - Prior Reviewer <input type="button" value="Customize"/>	<input type="text" value="14"/>	<input type="checkbox"/>
Dean Jones (Reviewer)	Reviewer Invitation on Revision - New Reviewer <input type="button" value="Customize"/>	<input type="text" value="14"/>	<input type="checkbox"/>
Doug Baldwin (Reviewer)	Reviewer Invitation on Revision - Prior Reviewer <input type="button" value="Customize"/>	<input type="text" value="14"/>	<input type="checkbox"/>

Alternate Reviewers

Name	Letter	Days to Review	Do Not Use
Trevor Barker (Reviewer)	Reviewer Invitation on Revision - New Reviewer <input type="button" value="Customize"/>	<input type="text" value="14"/>	<input type="checkbox"/>



Default Revision Letters

Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	<i>Original Submission:</i> Reviewer Invitation <i>Revision - Re-Invite:</i> Reviewer Invitation on Revision - Prior Reviewer <i>Revision - First Invite:</i> Reviewer Invitation on Revision - New Reviewer Select Letters
Reviewer Assigned (Not Invited)	<i>Original Submission:</i> Reviewer Assigned Instructions <i>Revision - Re-Invite:</i> Reviewer Assigned Instructions <i>Revision - First Invite:</i> Reviewer Assigned Instructions Select Letters
Reviewer Agree	<i>Original Submission:</i> Reviewer Instructions and Due Date <i>Revision - Re-Invite:</i> Reviewer Instructions and Due Date <i>Revision - First Invite:</i> Reviewer Instructions and Due Date Select Letters
Reviewer Decline	Reviewer Invitation Declined
Review Due Date Changed	Reviewer Due Date Change
Un-invite Reviewers Before Agreeing to Review	Reviewer Uninvited Notice
Un-assign Reviewers After Agreeing to Review	Reviewer Unassigned after Accepting Invitation
Promote Alternate Reviewers	<i>Original Submission:</i> Reviewer Invitation <i>Revision - Re-Invite:</i> Reviewer Invitation <i>Revision - First Invite:</i> Reviewer Invitation on Revision - New Reviewer Select Letters

ActionManager >
Reviewer Letters



Default Revision Letters

Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	<i>Original Submission:</i> Reviewer Invitation <i>Revision - Re-Invite:</i> Reviewer Invitation on Revision - Prior Reviewer <i>Revision - First Invite:</i> Reviewer Invitation on Revision - New Reviewer
Reviewer Assigned	assigned s
Reviewer Assigned	assigned s
Reviewer Assigned	assigned s
Reviewer Assigned	instructions and
Reviewer Assigned	instructions and
Reviewer Assigned	instructions and
Reviewer Decline	Reviewer Invitation Declined

Select Letters [X]

You may select a different default letter from the Reviewer Invitation letter family for each of the following cases:

Original Submission:
Reviewer Invitation

Revision - Re-Invite (Reviewer has reviewed a previous version):
Reviewer Invitation on Revision - Prior Reviewer

Revision - First Invite (Reviewer has **not** reviewed a previous version):
Reviewer Invitation on Revision - New Reviewer

Cancel Save

ActionManager >
Reviewer Letters



Editor Chain Templates

- Assign multiple Editors at the same time
- Editors can be added/removed from the template during Editor assignment
- Multiple Templates can be created and associated with different Article Types



Underused
Features

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Editor Chain Templates

Assign Editor Chain

Manuscript Number: DEMOSGG-00018

Title: Underused Features

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

Assign Individual Editor

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief ▼	<input type="text"/>	None ▼ Customize
	Editor 2	Associate Editor ▼	<input type="text"/>	Editor Assignment ▼ Customize

Associate Editor ▼



Editor Chain Templates

Assign Editor Chain

Manuscript Number: DEMOSGG-00018

Title: Underused Features

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[Assign Individual Editor](#)

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Gain Steven	None Customize
	Editor 2	Associate Editor	Gosselin Lisa	Editor Assignment Customize

Associate Editor

[Add to Chain](#)

[Cancel](#)

[Create Chain and Send Letters](#)



Editor Chain Templates

Assign Editor Chain

Manuscript Number: DEMOSGG-00018

Title: Underused Features

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Gain Steven	None
	Editor 2	Associate Editor	Gosselin Lisa	Editor Assignment
	Editor 3	Associate Editor	Rinklin Brad	None

Associate Editor

[Add to Chain](#)

[Cancel](#)

[Create Chain and Send Letters](#)



Editor Chain Templates

Assign Editor Chain

Manuscript Number: DEMOSGG-00018

Title: Underused Features

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

Assign Individual Editor

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Gain Steven	Editor Assignment Customize

Associate Editor

Add to Chain

Cancel

Create Chain and Send Letters



Editor Chain Templates

Assign Editor

Manuscript Number: DEMOSGG-00018

Title: Underused Features

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you to choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.

Click the Blind Editors link to block access to this submission for one or more Editors.
[Blind Editors](#)

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Associate Editor	Brad Rinklin	0	0		Yes
<input type="radio"/>	Editorial Coordinator	Joan Lewis	0	0		Yes
<input type="radio"/>	Associate Editor	Lisa Gosselin	0	0		Yes
<input type="radio"/>	Editor in Chief	Steven Gain	0	0		Yes
<input type="radio"/>	Editor	Elisha Daley	0	0		Yes
<input type="radio"/>	Editor in Chief	Bryan Brown	0	0		Yes
<input type="radio"/>	Managing Editor	Trevor Barker	0	0		Yes



Editor Chain Templates

- PolicyManager > Define Editor Assignment Chain Templates

Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor Assignment Chain Template List		+ Add Another Editor Assignment Chain Template
☰	 EIC to AE	
☰	 EIC to Editor to AE	
+ Add Another Editor Assignment Chain Template		

[Close](#)

[Edit Article Types](#)



Editor Chain Templates

- PolicyManager > Define Editor Assignment Chain Templates

Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Enter Editor Assignment Chain Template Details ✕

Open Special Character Palette

Description*

There are currently no Editor Roles in the Chain



Editor Chain Templates

- PolicyManager > Define Editor Assignment Chain Templates

Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor

Enter Editor Assignment Chain Template Details

Open Special Character Palette

Description*

	Role	Assignment Letter
	Associate Editor	None

Editor Chain Templates

- PolicyManager > Define Editor Assignment Chain Templates

Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor Assignment Chain Template List		+ Add Another Editor Assignment Chain Template
⋮	📄 ✎ EIC to AE	
⋮	📄 ✎ EIC to Editor to AE	
+ Add Another Editor Assignment Chain Template		

Close

[Edit Article Types](#)



Editor Chain Templates

- PolicyManager > Edit Article Types

Editor Parameters	New and Revised Submissions
Editor Assignment Chain Template:	EIC to AE ▼
Reviewer Parameters:	New and Revised Submissions
Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.	<input type="text" value="2"/>
Number of Days Reviewer has to Respond to Invitation:	<input type="text" value="0"/>
Automatically Un-assign Reviewers n days after 'Date Review Due'	<input type="text" value="0"/>
Automatically Un-assign late Reviewers with partial review saved.	<input type="checkbox"/>
Automatically Promote Alternate Reviewers:	<input checked="" type="checkbox"/>

change) to mainly prevent Author customization of titles suggested by an Editor when inviting an Author.

Select an Assignment Chain Template to allow the entire Editor Chain to be assigned in one action, not just the first Editor.

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 automatically un-assign late Reviewers even if they have a partial review saved.

Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines, is un-invited, or un-assigned.



Comments to Author: Text Box











- Individual text fields for the Editor and each Reviewer
- Ability to edit and exclude entire Reviewer response
- Cleaner layout for lengthy reviews

Underused
Features



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Comments to Author: Editor Decision

Action 	Manuscript Number 	Article Type 	Section/Category 	Article Title 	Author Name 	Initial Date Submitted 	Status Date 	Current Status 	Review Status
View Submission Details  Initiate Discussion History File Inventory Edit Submission Classifications Assign Editor Unassign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Set Final Disposition Initiate Production Submit Editor's Decision and Comments Send E-mail Linked Submissions	DEMOSGG-00019R1	EMUG 2017		Underused Features	Jeff Tassi	05/22/2017	06/07/2017	Required Reviews Completed	1 Complete (more...)

Page: 1 of 1 (1 total submissions)

Display results per page.



Comments to Author: Editor Decision Form

Decision:

[Details](#) [History](#) [Assign Editor](#) [Invite Reviewers](#) [View Review Question Responses](#) [Send E-mail](#)

Original Submission	
Wetsel Amy, PhD, MBA (Reviewer 1)	Minor Revision
Doug Baldwin (Reviewer 2)	Major Revision
Steven Gain (Editor in Chief)	Assigned - No Decision
Author Decision Letter	
Scott Farmer (Author)	

If the decision is Revise, the author has days to revise this submission.

Confidential Comments to Editor

[Insert Special Character](#)

Reviewer, Wetsel Amy: Amy's comments to the Editor

Reviewer, Doug Baldwin: Doug's comments to the Editor

Comments to Author

[Insert Special Character](#)

Editor can type comments here



Comments to Author: Decision Form

Individual Reviewer Comments to Author (Editor's Copy)

Select comments for inclusion in the Decision Letter sent to the Author. * indicates a comment modified from the original.

[Insert Special Character](#) [Open in New Window](#)

Wetsel Amy, PhD, MBA
Reviewer 1

Amy's comments to the author

[Insert Special Character](#) [Open in New Window](#)

Doug Baldwin
Reviewer 2

Doug's comments to the Author



Comments to Author: Decision Letter

Close

DEMOSGG-00018
Underused Features
SGG Demo 13.1
05/22/2017

Dear Scott Farmer,

Reviewers have now commented on your paper. You will see that they are advising that you revise your manuscript. If you are prepared to undertake the work required, I would be pleased to reconsider my decision.

For your guidance, reviewers' comments are appended below.

If you decide to revise the work, please submit a list of changes or a rebuttal against each point which is being raised when you submit the revised manuscript.

Your revision is due by 06/26/2017.

To submit a revision, go to <http://demosgg131.edmgr.com/> and log in as an Author. You will see a menu item named Submissions Needing Revision. You will find your submission record there.

Yours sincerely

Steven Gain
Editor in Chief
SGG Demo 13.1

Reviewers' comments:

Editor comments to the author

Reviewer 1: Amy's comments to the author

Reviewer 2: Doug's comments to the Author



Comments to Author Merge Fields

Underused Features

- %COMMENTS_TO_AUTHOR%
 - Inserts Editor comments entered in the Comments to Author Text field
- %INDIVIDUAL_REVIEWER_COMMENTS_TO_AUTHOR%
 - Inserts Reviewer comments entered in the Comments to Author Text field on the Review Form



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Comments to Authors

- PolicyManager > Create/Edit Review Forms > Edit a Review Form

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](#)



Review Questions and Responses on Editor Form

- Grid Displayed on Editor Form listing Review Questions and Responses for each Reviewer
- Ability to exclude Reviewer answers to each question
- Review Questions can be configured to not be merged into the decision letter



Underused Features

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Review Questions and Responses

Individual Reviewer Comments to Author (Editor's Copy)
Select comments for inclusion in the Decision Letter sent to the Author. * indicates a comment modified from the original.

Wetsel Amy, PhD, MBA
Reviewer 1

Amy's comments to the author

Doug Baldwin
Reviewer 2

Doug's comments to the Author

Review Questions and Responses

Wetsel Amy Reviewer 1	Doug Baldwin Reviewer 2
<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
I attest that I completed this continuing medical education activity and claim the following number of credits: 2.0	1.5
Are there any conflicts of interest to disclose relevant to this review? No	No
If major revisions are required and you wish to re-review the manuscript before acceptance please select the checkbox. <input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> No comments at this time	<input checked="" type="checkbox"/> The instructions and submission system were very easy to understand and use



Review Questions and Responses

Preview Letter - Editor Decision - Revise

[Close](#)

DEMOSGG-00018
Underused Features
SGG Demo 13.1
05/22/2017

Dear Scott Farmer,

Reviewers have now commented on your paper. You will see that they are advising that you revise your manuscript. If you are prepared to undertake the work required, I would be pleased to reconsider my decision.

For your guidance, reviewers' comments are appended below.

If you decide to revise the work, please submit a list of changes or a rebuttal against each point which is being raised when you submit the revised manuscript.

Your revision is due by 06/26/2017.

To submit a revision, go to <http://demosgg131.edmgr.com/> and log in as an Author. You will see a menu item named Submissions Needing Revision. You will find your submission record there.

Yours sincerely

Steven Gain
Editor in Chief
SGG Demo 13.1

Reviewers' comments:

Editor comments to the author

Reviewer 1: Amy's comments to the author

Reviewer 2: Doug's comments to the Author

Reviewer's Responses to Questions

Were the objectives and instructions for this review stated clearly?

Reviewer #1: Yes

Reviewer #2: No

Do you have any comments on the Journal review process?

Reviewer #1: No comments at this time

Reviewer #2: The instructions and submission system were very easy to understand and use



Review Questions and Responses Merge Fields

Underused Features

- %REVIEW_QUESTIONS_AND_RESPONSES%
 - Inserts Review Questions and Responses into Decision Letter
- %RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%
 - Inserts Review Questions and Responses and individual Reviewer comments into the Decision Letter
- %REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%
 - Inserts Review Questions and Responses and individual Reviewer comments into Reviewer Invitation/Assignment Letters



Review Questions and Responses

Editor Form: [Insert Special Character](#)

Display Custom Review Questions and Responses Grid

Order

<input type="text" value="1"/>	Editor Form
<input type="text" value="2"/>	Manuscript Rating Questions (when displayed)
<input type="text" value="3"/>	Custom Review Questions and Responses (when displayed)

PolicyManager >

Create Editor Forms >

Edit Editor Form



Review Questions and Responses

PolicyManager > Create/Edit Custom Review Questions > Edit a Question

Cancel Submit

Question: [Insert Special Character](#)

Were the objectives and instructions for this review stated clearly?

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: Yes/No ▼

Cancel Submit



Detailed People Notes

Underused Features

- Keep a record of the operator and date of each note
- Ability to delete Detailed People Notes
- With permission Detailed People Notes will be displayed when inviting Reviewers
- Share Detailed People Notes across portal-linked sites



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Detailed People Notes

Search People - Search Results

Choose the criterion for selecting People Records.

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

Criterion	Selector	Value	User Role
Last Name ▼	Begins With ▼	<input type="text" value="Tassi"/>	ALL ▼ END ▼
Last Name ▼	Begins With ▼	<input type="text"/>	END ▼
Last Name ▼	Begins With ▼	<input type="text"/>	

 Page: 1 of 1 (1 total People Matches) Display results per page.

Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role
<input type="checkbox"/>	Jeff Tassi ▼	Hudson	NH	UNITED STATES	[Author]	[Reviewer]	

 Page: 1 of 1 (1 total People Matches) Display results per page.



Detailed People Notes

Detailed People Notes

Add New Note: 

Character Count: 0 / 4000

Operator ▲▼	Note	Date ▲▼	Action
Steven Gain	New note about EMUG 2017	05/31/2017	

Display this section at the top of this page



Detailed People Notes

Detailed People Notes

Add New Note: ⓘ

New note being added

Character Count: 20 / 4000

Submit Note

View/Print All

Operator ▲▼	Note	Date ▲▼	Action
Steven Gain	New note about EMUG 2017	05/31/2017	🗑️

Display this section at the top of this page

Cancel Submit



Detailed People Notes

Detailed People Notes

Add New Note: i

Character Count: 0 / 4000


Operator ▲▼	Note	Date ▲▼	Action
Steven Gain	New note being added	06/01/2017	
Steven Gain	New note about EMUG 2017	05/31/2017	

Display this section at the top of this page





Detailed People Notes

Detailed People Notes

Add New Note: 

Character Count: 0 / 4000

Warning: This action will remove the note permanently.
Click 'Cancel' to retain the note, or 'OK' to remove it.

Operator	Note		Action
Steven Gain	New note being added	06/01/2017	
Steven Gain	New note about EMUG 2017	05/31/2017	

Display this section at the top of this page



Detailed People Notes

Reviewer Candidates

Select a checkbox by each person you wish to select as a Reviewer ([more...](#)).

Page: 1 of 1 (1 total Reviewers)

Display 10 results per page.

Select As				Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics													
Inv.	Asn.	Alt.	Prop.				Reviews in Progress:	Completed Reviews:	Un-assigned After Agreeing:	Terminated After Agreeing:	Last Review Agreed:	Last Review Completed:	Last Review Declined:	Avg Days Outstanding:	Manuscript Rating:	Avg Review Rating:	Date Last Invited:	Outstanding Invitations:	Agreed:	Declined:	Un-invited Before Agreeing:	Terminated:
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Jeff Tassi (Reviewer)	No		0	0	0	0	-	-	-	0	0	0	0	0	0	0	0	0

[+ Detailed People Notes](#)

(* indicates match between Reviewer and Manuscript Classifications)

Page: 1 of 1 (1 total Reviewers)

Display 10 results per page.



Detailed People Notes

Page: 1 of 1 (1 total Reviewers) Display 10 results per page.

Select As				Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics													
Inv.	Asn.	Alt.	Prop.				Reviews in Progress:	Completed Reviews:	Un-assigned After Agreeing:	Terminated After Agreeing:	Last Review Agreed:	Last Review Completed:	Last Review Declined:	Avg Days Outstanding:	Manuscript Rating:	Avg Review Rating:	Date Last Invited:	Outstanding Invitations:	Agreed:	Declined:	Un-invited Before Agreeing:	Terminated:
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Jeff Tassi (Reviewer)	No		0	0	0	0	-	-	-	0	0	0	0	0	0	0	0	0

Detailed People Notes

Operator	Note	Date
Steven Gain	New note being added	06/01/2017
Steven Gain	New note about EMUG 2017	05/31/2017

[View/Print All](#)



Detailed People Notes Portal Share

Viewing and Editing People Data

- Search People
 - View/Change Username and Password
 - Send Username and Password
 - Change E-mail Address
 - Change Preferred Method of Contact
 - Change Editor Role Designation to/from :
 - Editor in Chief
 - Associate Editor
 - Editorial Coordinator
 - Book Review Editor
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
 - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs

RoleManager >
Editor Role >
Edit a Role



Detailed People Notes Portal Share

- AdminManager > Share People > Set Detailed People Notes Sharing Policy

Set Detailed People Notes Sharing Policy

To share Detailed People Notes with other journals that have also selected to share Detailed People Notes, click the checkbox for 'Share Detailed People Notes with other journals'. You may select this option at any time. Your journal will synchronize your Detailed People Notes with all the other journals that are sharing notes.

You may deselect this option at any time to stop sharing Detailed People Notes. If you do, your journal will retain all the previously shared Detailed People Notes, but will not share any further changes to Detailed People Notes with other journals from that point on. If you do not wish to retain the notes shared from other journals, you may manually remove them from each user's personal record.

Share Detailed People Notes with other journals

[Define People Sharing Group](#)
[Define Reviewer Sharing Partners](#)
[Set Inactivation and Merging Policies](#)
[View Duplicate E-mail Policies](#)
[Configure Group Notifications](#)
[AdminManager Menu](#)



Detailed People Notes Portal Share

- AdminManager > Share People > Define People Sharing Group

Define People Sharing Group

Please enter the journals with whom you want to Share User Data. A relationship remains "unconfirmed" until the reciprocating journal agrees to Share User Data with your journal. When a user's data is synchronized, a single login for all journals in the group is achieved. This means that Usernames, Passwords and Contact Information will be synchronized among all journals with whom a confirmed relationship exists.

Allow Other Journals to:

Journal	Current Status	Inactivate Users	Merge Users	Share Detailed People Notes
DEMOAM131	Confirmed	Yes	Yes	Yes

Add journal (enter journal code)

[Stop Sharing User Data](#)



Detailed People Notes Portal Share

Viewing and Editing People Data

- Search People
 - View/Change Username and Password
 - Send Username and Password
 - Change E-mail Address
 - Change Preferred Method of Contact
 - Change Editor Role Designation to/from :

ALL EDITOR ROLES
Editor in Chief
Associate Editor
Editorial Coordinator
Book Review Editor
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
 - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs

RoleManager >
Editor Role >
Edit a Role



Assign Reviewer Number when Review is Submitted

Underused Features

- Helps keep Reviewer numbers in order
- Reviewer maintains the Reviewer number that is assigned when they submit their first review



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Assign Reviewer Number when Review is Submitted

Pending Reviewer Assignments for Bryan Brown

Page: 1 of 1 (1 total assignments) Display 10 results per page.

Action	My Reviewer Number	Manuscript Number	Article Type	Article Title	Status Date	Current Status	Date Reviewer Invited	Date Reviewer Agreed
View Submission Submit Recommendation Send E-mail	1	DEMOSGG-00020	Demo	Underused Features	06/12/2017	Under Review	06/12/2017	06/12/2017

Page: 1 of 1 (1 total assignments) Display 10 results per page.



Assign Reviewer Number when Review is Submitted

Pending Reviewer Assignments for Bryan Brown

Page: 1 of 1 (2 total assignments)

Display 10 results per page.

Action	My Reviewer Number	Manuscript Number	Article Type	Article Title	Status Date	Current Status	Date Reviewer Invited	Date Reviewer Agreed
View Submission Submit Recommendation Send E-mail	1	DEMOSGG-00020	Demo	Underused Features	06/12/2017	Under Review	06/12/2017	06/12/2017
View Submission Submit Recommendation Send E-mail		DEMOSGG-00022	Demo	Underused Features	06/12/2017	Under Review	06/12/2017	06/12/2017

Page: 1 of 1 (2 total assignments)

Display 10 results per page.



Assign Reviewer Number when Review is Submitted

Submissions with Required Reviews Complete - Steven Gain

Contents: New and revised manuscripts that have the number of required reviews completed. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Make a Decision. Use the up/down arrows to change the sort order.

Page: 1 of 1 (2 total submissions) Display results per page.

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status
View Submission Details ▾ Discussions History File Inventory Edit Submission Classifications Assign Editor Unassign Editor Invite Reviewers Solicit Commentary View Reviews and Comments ← Set Final Disposition Submit Editor's Decision and Comments Send E-mail Linked Submissions	DEMOSGG-00022	Demo		Underused Features	Terry K Badman, B.S.	06/12/2017	06/15/2017	Required Reviews Completed	2 Complete (more...)



Assign Reviewer Number when Review is Submitted

Close

View Reviews and Comments for Manuscript
DEMOSGG-00022
"Underused Features"
Original Submission

Click the recommendation term to view the comments for the submission.

[Attachments \(0\)](#) [View Manuscript Rating Card](#) [View Transferred Information](#)

	Original Submission
Doug Baldwin (Reviewer 1) ←	Accept
Brad Rinklin	Agreed to Review
Bryan Brown	Agreed to Review
Steven Gain (Editor in Chief)	
Author Decision Letter	
Terry K Badman, B.S. (Author)	

Close



Assign Reviewer Number when Review is Submitted

Close

View Reviews and Comments for Manuscript DEMOSGG-00022 "Underused Features" Original Submission

Click the recommendation term to view the comments for the submission.

[Attachments \(0\)](#) [View Manuscript Rating Card](#) [View Transferred Information](#)

	Original Submission
Doug Baldwin (Reviewer 1) ←	Accept
Bryan Brown (Reviewer 2) ←	Minor Revision
Brad Rinklin	Agreed to Review
Steven Gain (Editor in Chief)	
Author Decision Letter	
Terry K Badman, B.S. (Author)	

Close



Detailed People Notes Portal Share

- PolicyManager > General Policies > Set Reviewer Preferences

Reviewer Number Assignment

Please choose the point at which the system should generate the Reviewer Number used to refer to the identity of Reviewers in anonymous communications with Authors. Choose 'On Agreement/Assignment' to set it when the Reviewer first agrees to an Invitation to Review or is first Assigned. Choose 'On Submission of Completed Review' to set this when a Reviewer submits his first complete (not partial) review for a submission. If a Reviewer reviews any subsequent revisions of a submission, he retains the same Reviewer Number. Once assigned to a person, the Reviewer Number cannot be reassigned for use with any other person on that submission.

- On Agreement/Assignment - The Reviewer Number is assigned when the Reviewer first agrees to review a submission (or is assigned).
- On Submission of Completed Review - The Reviewer Number is assigned when the Reviewer submits his first complete review for a submission.

Cancel

Submit



Restricted File Types

Underused Features

- Prohibit certain file types from being uploaded by Authors
- Allow Editor to override the restricted file type setting
- Each Submission Item can be configured differently
- Initial Submission and Revised Submissions can have different settings



Restricted File Types

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	Actions
<input type="text" value="1"/>	Manuscript	Document	Edit
<input type="text" value="2"/>	Author Agreement	Default	Edit
<input type="text" value="3"/>	Figure (B&W)	Figure	Edit
<input type="text" value="4"/>	Figure (Color)	Figure	Edit
<input type="text" value="5"/>	Table	Table	Edit
<input type="text" value="6"/>	Video	Supplemental	Remove Edit
<input type="text" value="7"/>	Companion File (Editorial)	Document	Edit
<input type="text" value="8"/>	Companion File (Production)	Default	Edit
<input type="text" value="9"/>	Disclosure Form	Default	Edit
<input type="text" value="10"/>	CIF File	Default	Remove Edit

Update Item Order

Sort In Alphabetical Order



Restricted File Types

Restricted File Types

You can restrict the types of files that can be uploaded for a Submission Item on the Attach Files page for both New and Revised submissions, with one exception: compressed files (zip, gz, tgz, and tar) cannot be restricted.

For a file that will be built into a Reviewer PDF or Author/Editor PDF, you can allow all file types supported by the system for PDFs, or define either an exclusive list or an inclusive list which is based on the file types supported by the system for PDF handling:

- Allow all file types supported for PDFs (no publication file restrictions)
- Exclusive: Allow all file types on the list except the ones selected.
- Inclusive: Allow only the file types selected on the list.

New Submission

- Allow all file types
- Exclusive: Allow all file types on the list except the ones selected.

PICT Image (PCT PICT)
TeX Document (TEX)
WordPerfect Document (WPD WPG)
Word 97-2003 Compatible Document (DOC RTF HTM HTML TXT)
PDF Document (PDF)
PostScript (PS EPS)
General Image (JPG JPEG GIF BMP PSD PNG)

- Inclusive: Allow only these files types

Open Office PowerPoint (OPD)
Open Office Word (ODT)
Open Office Excel (ODS)
PowerPoint 2007 (PPTM PPTX)
Excel 2007 (XLSB XLSM XLSX)
Word 2007 (DOCX DOCM DOTM DOTX)
Compiled LaTeX File (DVI)

Revised Submission

- Allow all file types
- Exclusive: Allow all file types on the list except the ones selected.

PICT Image (PCT PICT)
TeX Document (TEX)
WordPerfect Document (WPD WPG)
Word 97-2003 Compatible Document (DOC RTF HTM HTML TXT)
PDF Document (PDF)
PostScript (PS EPS)
General Image (JPG JPEG GIF BMP PSD PNG)

- Inclusive: Allow only these files types

Open Office PowerPoint (OPD)
Open Office Word (ODT)
Open Office Excel (ODS)
PowerPoint 2007 (PPTM PPTX)
Excel 2007 (XLSB XLSM XLSX)
Word 2007 (DOCX DOCM DOTM DOTX)
Compiled LaTeX File (DVI)

Cancel

Submit



Restricted File Types

New Submission

- ✓ Select Article Type
- ✓ Enter Title
- ✓ Add/Edit/Remove Authors
- ✓ Funding Information
- Select Section/Category
- Submit Abstract
- Additional Information
- Enter Comments
- Suggest Reviewers
- Request Editor
- ➔ Attach Files

[Insert Special Character](#)

Please Attach Files


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

Item

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

Description

Or Drag & Drop Files Here



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

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
<input type="text" value="1"/>	<input type="text" value="Choose"/>	<input type="text"/>	Manuscript.pdf	79.0 KB	06/01/2017	Download	<input type="checkbox"/>

[Check All](#) [Clear All](#)



Restricted File Types

[-] Edit Submission

- Edit Submission Before Decision
 - View Reviewer PDF After Edit Submission
 - Require View of Reviewer PDF After Edit Submission
- Edit Submission After Decision and Final Disposition
- Download Source Files
 - Download Companion Files
 - Upload, Hide and Restore Companion files
- Assign Manuscript Classifications
- Manage Other Authors
 - Edit Other Author E-mail Address
- Bypass 'Restricted File Types' Requirements

PolicyManager >
Submission Policies >
Edit Submission Items

RoleManager >
Editor Role >
Edit a Role



URL/URI Submission Items

Underused Features

- Authors upload files to an external location
- Link built into PDF for users to access the item
- Required or Optional Setting



URL/URI 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	Actions
<input type="text" value="1"/>	Manuscript	Document	Edit
<input type="text" value="2"/>	Author Agreement	Default	Edit
<input type="text" value="3"/>	Figure (B&W)	Figure	Edit
<input type="text" value="4"/>	Figure (Color)	Figure	Edit
<input type="text" value="5"/>	Table	Table	Edit
<input type="text" value="6"/>	Video	Supplemental	Edit
<input type="text" value="7"/>	Companion File (Editorial)	Document	Edit
<input type="text" value="8"/>	Companion File (Production)	Default	Edit
<input type="text" value="9"/>	Disclosure Form	Default	Edit
<input type="text" value="10"/>	CIF File	Default	Remove Edit

Update Item Order

Sort In Alphabetical Order



URL/URI Submission Items

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

This Submission Item Type is a Companion File (not built into PDF)

Reviewer PDF Handling

Author/Editor PDF Handling

Important Note: If 'Build Hyperlink to the Item into the PDF(Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

URL/URI/External Resource Entry (in lieu of file upload) :

Display with automatic line numbering in PDF

Do Not Unpack Archive files (.ZIP, .tar) of this Type

Include this Item Type for checkCIF

Optional, Required or Hidden



URL/URI Submission Items

New Submission

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- Funding Information
- Select Section/Category
- Submit Abstract
- Additional Information
- Enter Comments
- Suggest Reviewers
- Request Editor
- Attach Files

Insert Special Character

Please Attach Files

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

Item
Video ▼


Enter a **Description** and select a **Delivery Method**. To deliver files online, either choose files or drag or drop files.

Description

Delivery Method

Online Web System
 Offline
 URL/URI/External Resource

Or Drag & Drop Files Here



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

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	Video ▼	Video Uploaded via Editorial Manager	Video.mp4	15.3 MB	06/13/2017	Download	<input type="checkbox"/>

[Check All](#) [Clear All](#)



URL/URI Submission Items

[Insert Special Character](#)

Please Attach Files

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

Item

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

Description

Delivery Method Online Web System Offline URL/URI/External Resource

URL/URI/External Resource Location:

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

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

[Check All](#) [Clear All](#)

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
<input type="text" value="1"/>	<input type="text" value="Video"/>	<input type="text" value="Video Uploaded via Editorial Manager"/>	Video.mp4	15.3 MB	06/13/2017	Download	<input type="checkbox"/>



URL/URI Submission Items

New Submission

- ✓ Select Article Type
- ✓ Enter Title
- ✓ Add/Edit/Remove Authors
- Funding Information
- Select Section/Category
- Submit Abstract
- Additional Information
- Enter Comments
- Suggest Reviewers
- Request Editor
- ➔ **Attach Files**

[Insert Special Character](#)

Please Attach Files

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

Item

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

Description

Delivery Method Online Web System Offline URL/URI/External Resource

URL/URI/External Resource Location:

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

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

[Check All](#) [Clear All](#)

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
<input type="text" value="1"/>	<input type="text" value="Video"/>	<input type="text" value="Video Uploaded via Editorial Manager"/>	Video.mp4	15.3 MB	06/13/2017	Download	<input type="checkbox"/>
<input type="text" value="2"/>	<input type="text" value="Video"/>	<input type="text" value="Video Uploaded as a URL"/>	External Item		06/13/2017	Access Item	<input type="checkbox"/>

[Check All](#) [Clear All](#)



URL/URI Submission Items

Contents: These are the new submissions that require an Editor Assignment. Use the up/down arrows to change the sort order.

Page: 1 of 1 (1 total submissions) 1 10 ▼

Action	Manuscript Number	Article Type	Article Title	Author Name	Current Status	Initial Date Submitted	Status Date
View Submission Duplicate Submission Check (...) Details ▾ Initiate Discussion History File Inventory ← Edit Submission Send Back to Author Remove Submission Classifications Assign Editor Set Final Disposition Initiate Production Send E-mail Linked Submissions	DEMOSGG-00023	Demo	Underused Features	Steven Gain ▾	Manuscript Submitted	06/13/2017	06/13/2017



URL/URI Submission Items

File Inventory for Manuscript Number: DEMOSGG-00023 Steven Gain (UNITED STATES): "Underused Features" [\(View Submission PDFs\)](#)

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

[Download Selections as Zip File](#)

[Close](#)

[Save and Close](#)

[Duplicate Submission Check \(...\)](#)

Submission Files

Check All Clear All	Action	Item	Description	Item Family	File Name	Size	Modified	Display On TF
<input type="checkbox"/>	Download	Video	Video Uploaded via Editorial Manager	Supplemental	Video.mp4	15.3 MB	06/13/2017	✓
	Access Item	Video	Video Uploaded as a URL	Supplemental	External Item		06/13/2017	✓

[Upload Companion File](#)

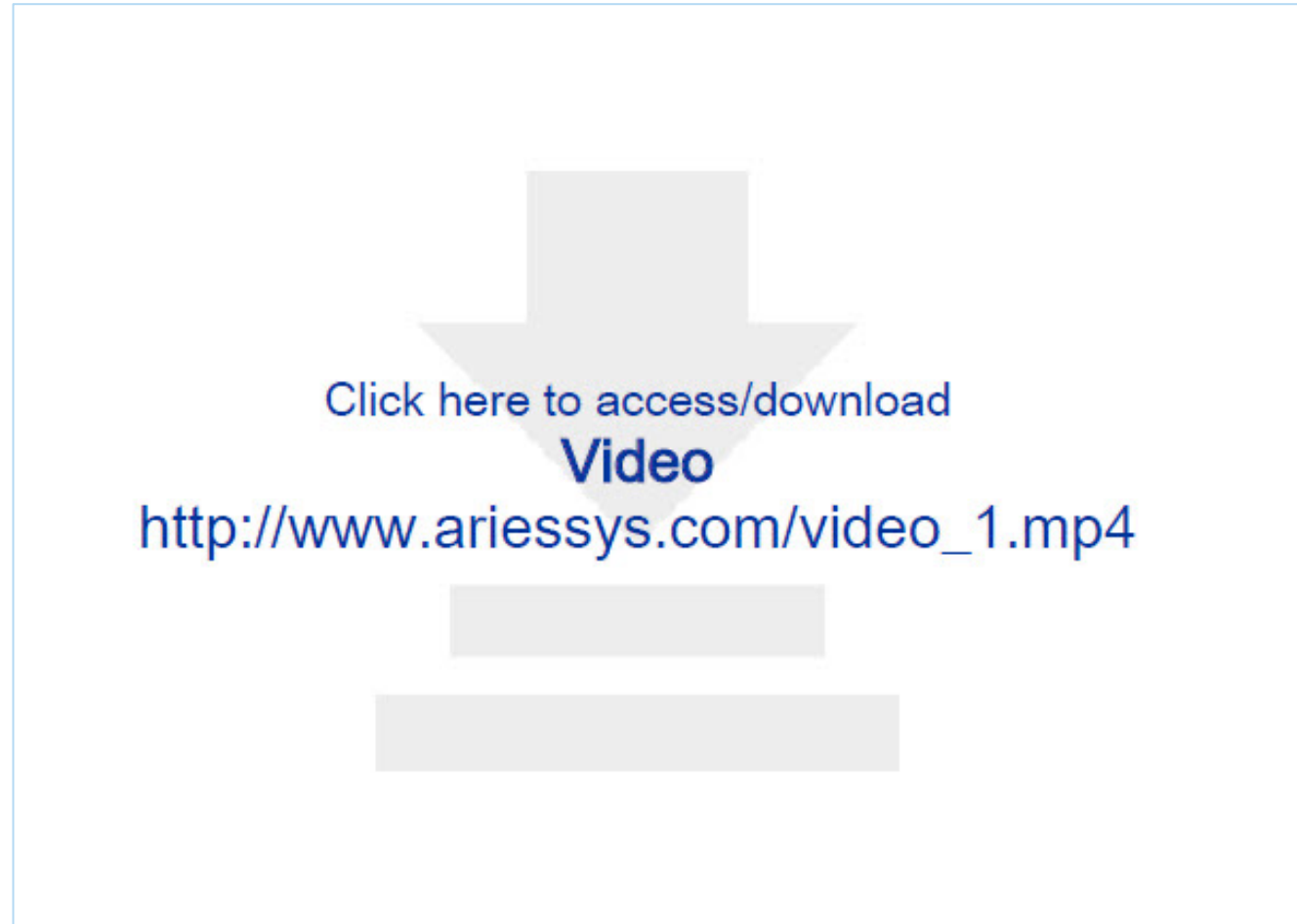
[Download Selections as Zip File](#)

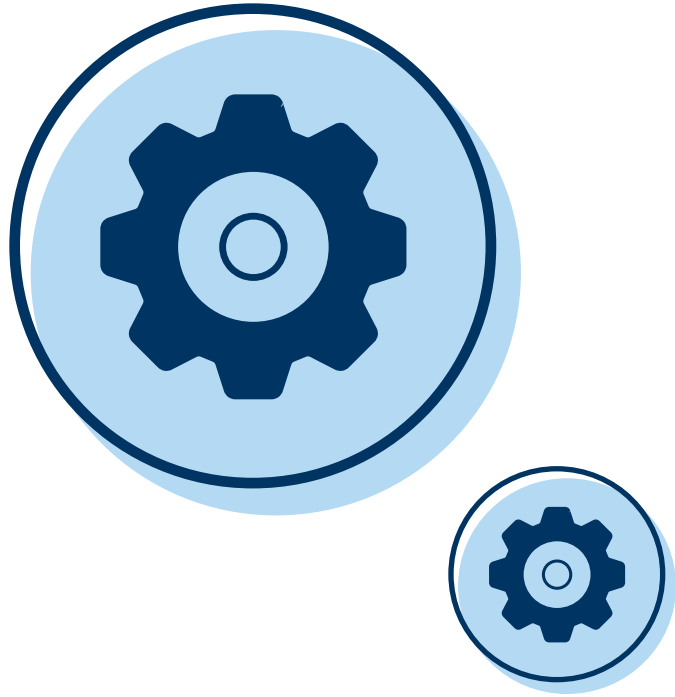
[Close](#)

[Save and Close](#)



URL/URI Submission Items





Site Audits

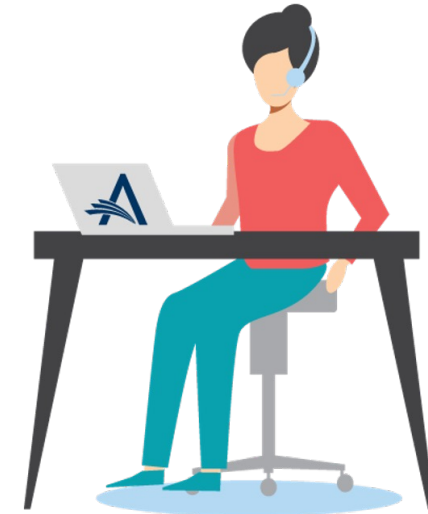
Site Audits

- What is a site audit?
 - Aries Client Services reviews your site
 - Identify useful features based on conversations with you
 - Offer tips/suggestions to help you get the most out of EM/PM
 - No configuration changes will be made to your site
- Benefits of a site audit
 - Established publications may overlook new features that would be useful
 - Newer publications may be more open to adapting workflows after using EM
 - A second set of eyes to improve your workflow and process



Site Audits – The Process

- Publisher identifies the EM site for audit
 - Representative of current workflow
 - New or divergent workflow from standard
- Introductory call held with key publication staff
 - Review site audit process and timeline
- In-depth interview with Managing Editor or workflow admin. and Aries staff
 - What are the customers goals for the audit?
 - What pain points or questions are you looking to address with the audit?
 - Explanation of audit process and workflow questionnaire



Site Audits – The Process

- Following the call, a questionnaire is sent to gather some final data
 - Discovery around information customers would like to collect but are not currently
 - Are there daily tasks that you would like to change?
- A clone of the site is made, and Client Services does a full review of the cloned site, looking for areas of improvement
- ~3-4 weeks later, a report is delivered with findings and recommendations
- Users can make any adjustments in the cloned site for testing prior to implementation on a live site or sites



Site Audits – How to Get One?

- Contact your Account Coordinator or Account Manager
- Speak to a member of Aries' staff today!



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F: +1 978-975-3811

Site Audit Report and Recommendations

Publisher: {Publisher}
Society: {Society Name (if applicable)}
{Journal/Publication} Name: {Publication Name}
{Journal/Publication} Site: {SITE NAME}
Audit Conducted by: {Auditor}
Date Conducted: {QN YYYY}

Brief Summary

Registration, Home and Login Page Suggestions

Update Home Page: The Home page currently lists information that may be out of date. Specifically, {describe outdated content}.

A best practice is to avoid using dates on the Home page unless a procedure is in place for someone to review it regularly for currency.

{SITE NAME}'s Aries Account Coordinator can make changes to the homepage, including any necessary changes to the [HTML](#).

Match Colors and Banner with Publication Branding: The colors on the Home page and banner do not match the branding found on the publication Home page [\[insert URL\]](#). Keeping the color

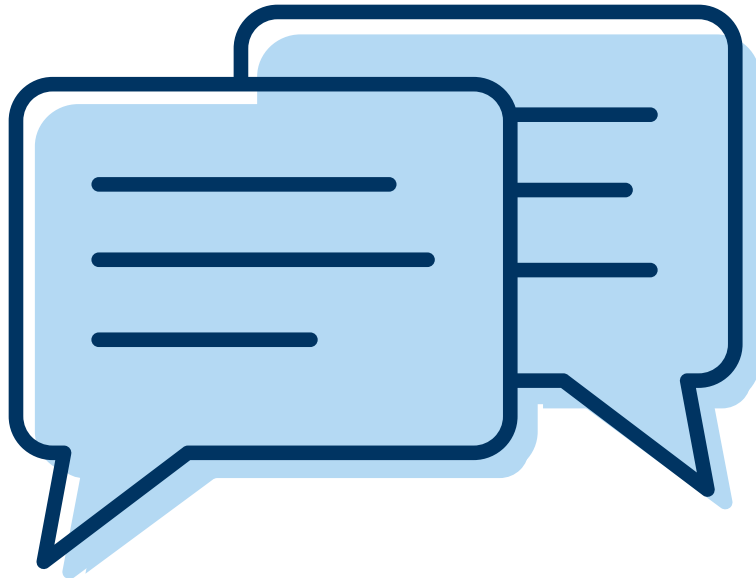
of EM. We
did spot areas

the EM features
audit.

ment with the
tials.

figurations;
ose to utilize





Questions?

Questions and suggestions about workflow, configurations, and Aries' Ecosystem



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