



Publish Faster. Publish Smarter.

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# EMUG 2023



**Courtyard Boston Downtown Hotel**  
**June 14-15, 2023**

**Aries**  
systems.



# EMUG 2023

## EM Beginners Bootcamp

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# Agenda

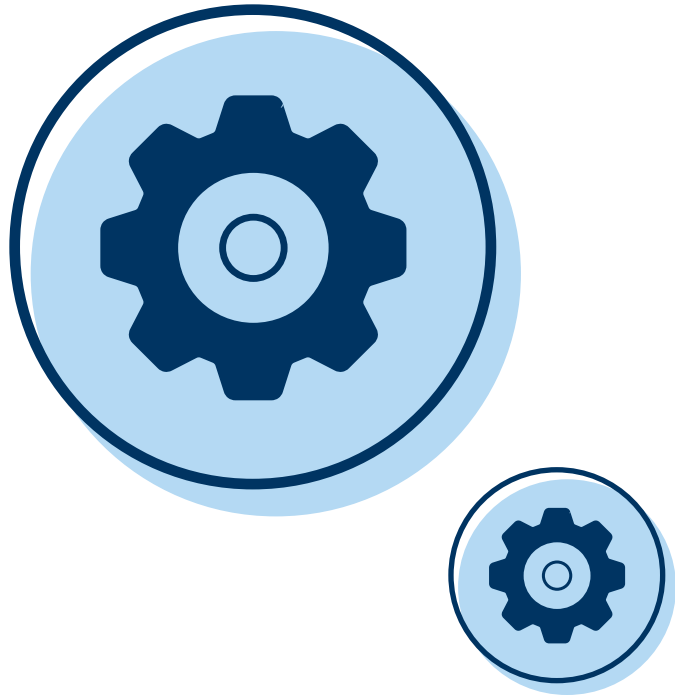
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Welcome to  
EMUG: Day 1

- Basic System Structure
- Overview of Editorial Workflows
  - Author Submission
  - Editor Triage and Decision
  - Reviewer Invitation and Submission
- Searches & User Records
- Basic Reporting
- Resources
- Questions from Attendees







# System Structure

*Breaking it down*



# The Aries Ecosystem: Integrated Solutions

- Connects users with best-in-class tools and services, all in one place and directly within workflow
- Comprised of both Aries and third-party technology that plug into EM and/or PM
- Enables publishers to address new initiatives and workflow/quality gaps without additional investment
- Continuously evolving to meet needs of the industry

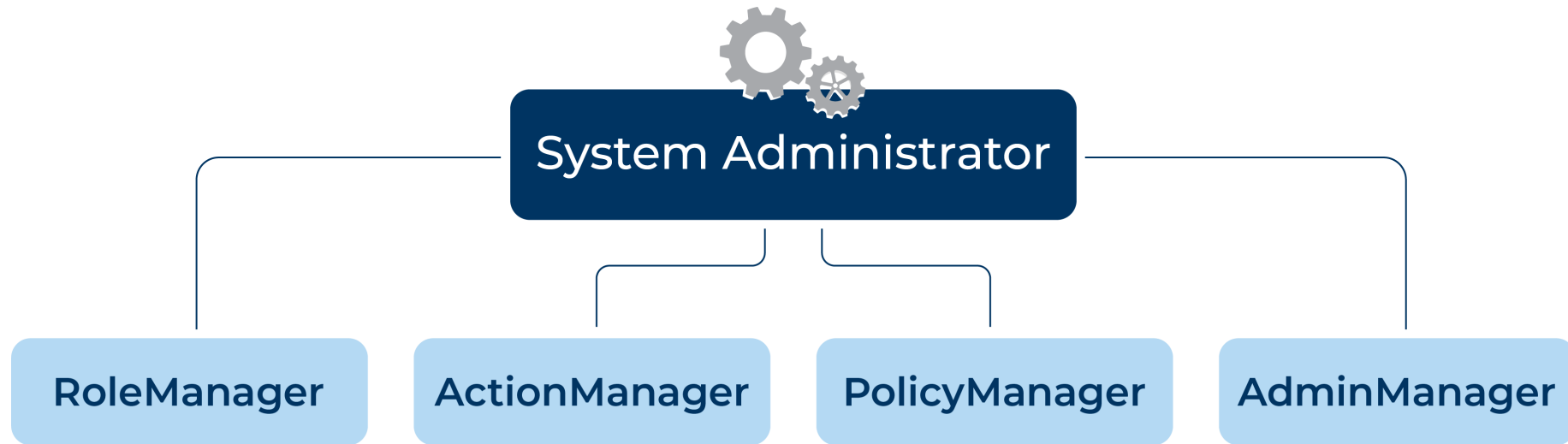


# Editorial Manager is a Role-Based System



- Consists of 4 role families: Author, Editor, Reviewer, and Publisher
- The Author role is the default role; one user account is limited to one role per role family
- Roles and their permissions are configured in "RoleManager"

# How System Administrator is Organized



- RoleManager: where user roles and their permissions are configured
- ActionManager: who gets automated notifications when events occur
- PolicyManager: where general configurations are set
- AdminManager: Share Data, Transfer Submissions, Share Letters, restricted admin rights



# Accessing System Administrator

## Administrative Functions

System Administrator Functions

Register New User

Reports

Send Reminder Letters

Send Batch E-mail



For Editor roles with permission use:

- "System Administrator" link in System Administrative Functions box
- Shortcut link – full or restricted access

*System Administrative Functions only appears for Editor roles with configured admin permissions*



## RoleManager

[Author Role](#)  
[Reviewer Role](#)  
[Editor Role](#)  
[Publisher Role](#)

<a href="#">Managing Editor</a>	<a href="#">Remove Edit Copy</a>
<a href="#">Editor</a>	<a href="#">Remove Edit Copy</a>
<a href="#">Editorial Assistant</a>	<a href="#">Remove Edit Copy</a>
<a href="#">Editor-in-Chief</a>	<a href="#">Remove Edit Copy</a>

## Edit Role Definition

Role Name: \*

Maximum Role name is 40 characters.

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

[Expand All](#) [Collapse All](#)

### [-] New Submissions

- Receive New and Revised Submissions
  - Perform Technical Check
  - Submit Early Decision on New Submissions
- Receive New Transferred Submissions in 'Transferred Submissions' Folder
- Submit Manuscript as an Editor
  - Restrict to 'Editor/Publisher Use Only' Article Types
  - Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types

### [-] Editor Assignment

- Receive Assignments in 'New Assignments' Folder
- Receive Assignments without Invitation



## ActionManager

---

ActionManager allows you to specify who receives letters when a document's status changes, based on all the events that are tracked by Editorial Manager®. All the roles that have been defined in RoleManager are listed below.

[Document Status](#)

[Author Letters](#)

[Reviewer Letters](#)

[Managing Editor Letters](#)

[Editor Letters](#)

[Editorial Assistant Letters](#)

[Editor-in-Chief Letters](#)

[Publisher Letters](#)

- A fixed set of events can trigger an automated notification
- Each role can have its own notifications configured
- A quick reference guide can be found [here](#)





# ActionManager

RoleManager

ActionManager

PolicyManager

AdminManager

## Reviewer Assigned

Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	<p><i>Original Submission:</i> Reviewer Invitation</p> <p><i>Revision - Re-Invite:</i> Reviewer Invitation</p> <p><i>Revision - First Invite:</i> Reviewer Invitation</p> <p><a href="#">Select Letters</a></p>
Reviewer Assigned (Not Invited)	<p><i>Original Submission:</i> Reviewer Assignment</p> <p><i>Revision - Re-Invite:</i> Reviewer Assignment</p> <p><i>Revision - First Invite:</i> Reviewer Assignment</p> <p><a href="#">Select Letters</a></p>
Reviewer Agree	<p><i>Original Submission:</i> Reviewer Instructions and Due Date</p> <p><i>Revision - Re-Invite:</i> Reviewer Instructions and Due Date</p> <p><i>Revision - First Invite:</i> Reviewer Instructions and Due Date</p> <p><a href="#">Select Letters</a></p>
Reviewer Decline	Reviewer Invitation Declined
Review Due Date Changed	Reviewer Changed Due Date Confirmation



## PolicyManager Main Menu

Expand All

Collapse All

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊕ **Submission Policies**
- ⊕ **Questionnaire Policies**
- ⊕ **Additional Data Policies**
- ⊕ **Editor Assignment Policies**
- ⊕ **Reviewer and Editor Form Policies**
- ⊕ **E-mail and Letter Policies**
- ⊕ **General Policies**
- ⊕ **Discussion Forums**
- ⊕ **Linked Submissions Policies**
- ⊕ **Conference Submission Policies**
- ⊕ **Transmittal Policies**
- ⊕ **Produxion Manager**

- Bulk of site configurations done here
- Some configurations are multistep



## Registration and Login Policies

## Status Policies

## Submission Policies

[Edit Article Types](#)[Edit Submission Items](#)[Configure Color Codes for Companion Files](#)[Edit Sections/Categories](#)[Set Classifications Display Policy](#)[Edit Classifications](#)[Edit Request Authenticated ORCID ID Instructions](#)[Define PDF Cover Page Layouts](#)[Configure PDF Watermarks](#)[Select Author's Reviewer Preferences](#)[Set Request Editor or Assign Editor Display Options](#)[Edit Manuscript Geographic Region of Origin](#)[Edit Manuscript Submission Instructions](#)[Edit Legacy Manuscript Submission Instructions](#)[Configure Instructions for New Submission Redirect](#)[Configure Manuscript Services Icon](#)[Set Maximum Size of Uploaded File](#)[Set Other Author Parameters](#)[Configure Contributor Roles](#)[Set Revision File Selection Option](#)

## Edit Article Types

Types available for manuscript submission, conference submissions, proposal creation, invited submissions, comme

Order	Article Type	Article Type Family	Editor/Publish		
			Invited	Use Only	
1	Original Study	Regular			Remove Edit Copy
2	Editorial	Regular			Remove Edit Copy
4	Review	Regular			Remove Edit Copy
5	Rapid Communication	Regular			Remove Edit Copy
7	Case Report	Regular			Remove Edit Copy
8	Letter to the Editor	Regular			Remove Edit Copy
9	Commentary	Regular	<input checked="" type="checkbox"/>		Remove Edit Copy
10	Special Issue	Proposal			Remove Edit Copy

## Edit Article Type

Article Type:

Maximum Article Type name is 75 characters.

Warning: changing the Article Type name will apply the name change to all submissions of this type, including previously submitted manuscripts/submissions.

Family:   Invited  Editor Use Only

Assign the 'Proposal' Family to Editor-generated Article Types. Check the 'Invited' box for Article Types used when Authors are invited to submit.

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

Custom Metadata ID:

Select Custom Metadata ID

Allow file uploads from arXiv.org server

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

You must also enable the check for duplicate submissions on the Configure Duplicate Submission Check page.

**Consortium-funded Open Access:**  Allow Consortium-funded OA publication for this Article Type



- [+ Registration and Login Policies](#)
- [+ Status Policies](#)
- [+ Submission Policies](#)
- [+ Questionnaire Policies](#)
- [+ Additional Data Policies](#)
- [+ Editor Assignment Policies](#)
- [+ Reviewer and Editor Form Policies](#)
- [- E-mail and Letter Policies](#)

[Edit Letters](#)

[Define Custom Merge Fields](#)

[Set "Email From" Address](#)

[Manage Preferred Method of Contact Settings](#)

[Configure Waiver Request](#)

[Configure Email Import](#)

[Set Notify Author Blinding Policy](#)

[Set Notify Editor Preference](#)

## Edit Letters

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

[Back to PolicyManager](#)

Add New Letter

Save Changes

Edit Image Files for Letters

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		
			Text	Rich Text (HTML)	All Formats
Author Requests Deadline Extension on Revision	Ad Hoc From Author		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Author Requests Deadline Extension on Submission	Ad Hoc From Author		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Author Notice - MS Outside of Publication Scope	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Editor Query to Journal Office	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Editor Query to Other Assigned Editors	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Editor Query to reviewer(s)	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Reviewer Requests Deadline Extension on Review	Ad Hoc From Reviewer		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Author Invitation for Commentary	Author Invitation	<a href="#">Author</a> - Solicit Commentary on Submission	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>



## AdminManager Main Menu

Set Live Journal Flag  
Configure Enterprise Analytics Reporting Menus  
Set Default Target FTP Site for Extract of Conference Submissions  
Share People  
Configure Shared Letters Management  
Configure Cross-Publication Submission Transfer  
View File Transfer Statistics  
Configure Restricted System Administration Access Rights  
Configure Manuscript Service Providers for Ingest Service  
Configure Deep Links  
Configure Read & Publish Preferences

- Set your site live
- Configure Read & Publish preferences (relates to consortium-funded Open Access funding)
- Configure System Administrator Access Rights





# Overview of Editorial Workflow

*Author Submission Process*

# Submission Process

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## Author Interface

- Author Main Menu
- Selecting Article Type
- Attaching Files
- Filling in Additional Information
- Building and Approving the PDF



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# Author Main Menu (Live Demo)

Home Main Menu Submit a Manuscript About ▾ Help ▾

**Important Message: Site under development. Do not use for live manuscript submission.**

Proxying for Bobby Jeffrey Hill - Author

## Author Main Menu

[Alternate Contact Information](#)  
[Unavailable Dates](#)

For additional help with your submission, please click [here](#) for the Author Tutorial.

## New Submissions

- [Submit New Manuscript](#)
- [Submissions Sent Back to Author \(0\)](#)
- [Incomplete Submissions \(4\)](#)
- [Submissions Waiting for Author's Approval \(0\)](#)
- [Submissions Being Processed \(0\)](#)

## Revisions

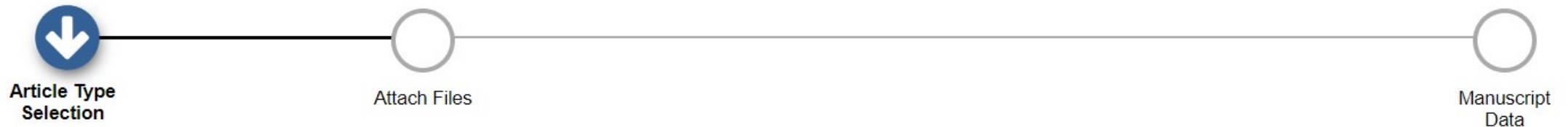
- [Submissions Needing Revision \(0\)](#)
- [Revisions Sent Back to Author \(0\)](#)
- [Incomplete Submissions Being Revised \(0\)](#)
- [Revisions Waiting for Author's Approval \(0\)](#)





# Submission Process (Live Demo)

- Each step in the submission process is customizable



**Choose the Article Type of your submission from the drop-down menu.**

**Select Article Type**

EMUG Demo ▼

**Proceed** →

# Selecting Article Type

- Available Article Types are set by the journal
- Each Article Type can have different steps and submission Item Types
- Selecting the Article Type will **always** be required for Authors (this is **not** configurable)



**Choose the Article Type of your submission from the drop-down menu.**

### Select Article Type

- None
- Original Study
- Editorial
- Review
- Rapid Communication
- Case Report
- Letter to the Editor
- Annual Meeting Abstract
- EMUG Demo

# Attach Files Step

- Completed steps are checked in green
- The Author may click the browse button or drag and drop



Insert Special Character

***Please provide a single file containing your manuscript now. Data included in your manuscript may be used to populate information for you later in the submission process.***

Browse...

OR

  
Drag &  
Drop  
Files Here

← Back

Proceed →



# Uploading and Naming: Item Types

- Author must upload item: Manuscript title, Authors, keywords, and abstract extracted (if Word file)
- .zip files, URLs, supplementary materials (ex: audio and video)
- Can restrict Item Types



**Required For Submission:**  
✓ Manuscript

*Please provide any additional items.*

Select Item Type

- \*Manuscript
- \*Manuscript
- Author Agreement
- Figure
- Table
- Dataset

nt:

[Browse...](#) OR

[Insert Special Character](#)

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 manually if necessary.

Change Item Type of all  files to  [Change Now](#)

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

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	*Manuscript	Manuscript	EMUG demo paper.docx	12.1 KB	May 04, 2023	<a href="#">Confirm/Edit Data</a> <a href="#">Download</a>	<input type="checkbox"/>

[Update File Order](#)

[Remove](#)

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



# General Information

- Region of Origin, Section/Category, and Classification data entered here
- Sections are expandable via + sign or "next" button



*Please provide the requested information.*

[Insert Special Character](#)

**- Region Of Origin**

---

Select the Region of Origin related to your submission from the drop-down menu below.

---

Choose Region

**↓ Next**

**+ Section/Category**

**+ Classifications**

**← Back** **Proceed →**



# Expanded View

*Please provide the requested information.*

[Insert Special Character](#)

## - Region Of Origin

Select the Region of Origin related to your submission from the drop-down menu below.

Choose Region

↓ Next

## - Section/Category

Select the Section or Category related to your manuscript from the drop-down menu below.

None

↓ Next

## - Classifications

Please identify your submission's areas of interest and specialization by selecting one or more



# Section and Category

+ Region Of Origin

- Section/Category

---

Select the Section or Category related to your manuscript from the drop-down menu below.

---

None

None

Basic Science Section

Clinical Section

+ Epidemiology Section

Demo Section (No one Responsible Yet)

↓ Next

- Allows the journal office to group similar submissions together (ex: similar topic/structure)
- This step can also be used with Editorial Manager's Direct-to-Editor (D2E) feature
- D2E feature saves time by sending the submission straight to the responsible Editor



# Classifications

**Classifications**

---

Please identify your submission's areas of interest and specialization by selecting one or more classifications.

---

Select up to 3 Classification(s)  
(None Selected)

**Add Classifications**

### Select Submission Classifications

Cancel Submit

Please identify your manuscript's areas of Interest and specialization by selecting one or more classifications from the list below. Click 'Submit' at the bottom of the page when you are done.

To save changes you must click "Submit" before you leave this window. [\(less...\)](#)

---

Search:  Search Clear

[Matching terms display in red text]

Expand All Collapse All

10: **Vehicles**

- .200: Car
- .400: Train

20: **Biology**

- .500: Germs

30: **Veggies**

Selected Classifications: Select up to 3 Classification(s)

Add->

<-Remove

Expand All Collapse All

Cancel Submit



- Terms set by the journal that can be associated with the submission
- Reviewers can be matched to submissions by searching for Reviewers by classifications
- The classifications can be organized hierarchically
- A limit can be set (min./max. or none)






# Review Preferences

- Publications can allow Authors to suggest/oppose Reviewers and request an Editor



*Please provide the requested information.*

**+ Request Editor**

**- Suggest Reviewers** 

Please suggest potential reviewers for this submission and provide specific reasons for your suggestion in the comments box for each person. Please note that the editorial office may not use your suggestions, but your help is appreciated and may speed up the selection of appropriate reviewers.

**Suggesting 1 reviewer(s) is Required for Submission.**

**Current Suggested Reviewers List** **+ Add Suggested Reviewer**

*There are currently no Suggested Reviewers in the list.*

**+ Add Suggested Reviewer**

**↓ Next**

**+ Oppose Reviewers**

**← Back**    **Proceed →**



# Suggesting a Reviewer

**Add New Reviewer**

Insert Special Characters

**Given/First Name \*** Ricky

Middle Name

**Family/Last Name \*** Reviewer

Degree

Position

Institution

Start typing to display potentially matching institutions. ⓘ

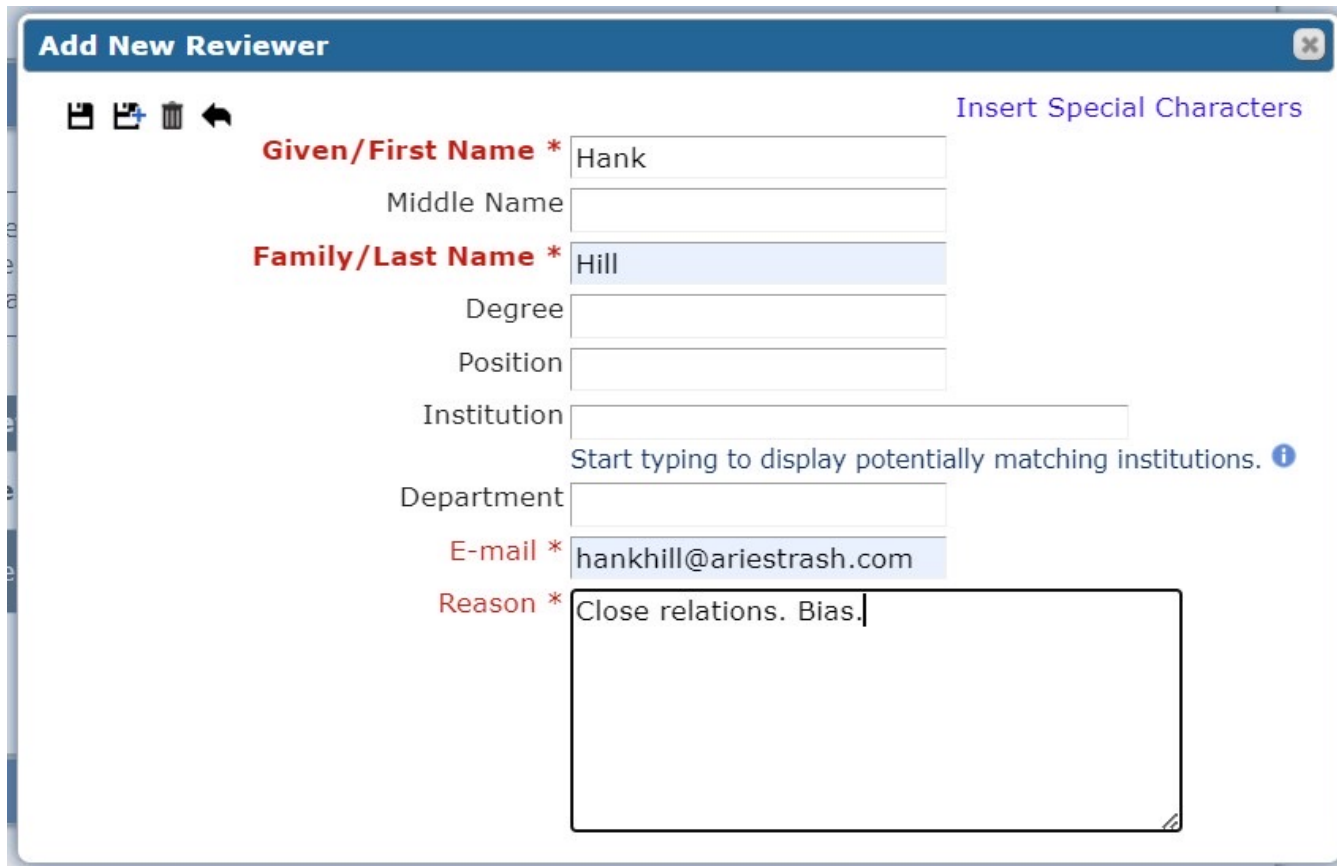
Department

**E-mail \*** rickyreviewer@ariestrash.com

Reason

- Journal can set required fields in this step (first and last names always required)
- Does not automatically attach Reviewer to submission
  - Suggestion only
- Can add a Reviewer outside of the system. Journal can add them later

# Opposing a Reviewer



**Add New Reviewer**

Insert Special Characters

Given/First Name \* Hank

Middle Name

Family/Last Name \* Hill

Degree

Position

Institution

Start typing to display potentially matching institutions. ⓘ

Department

E-mail \* hankhill@ariestrash.com

Reason \* Close relations. Bias.]

- Journal can allow Author to *oppose* a Reviewer
- Fields can be configured

# Requesting an Editor

- Journals can allow Authors to request an Editor
- May be used in conjunction with D2E – chosen Editor immediately gets the submission
- Journal can decide what information is presented – information about the Editors themselves

**– Request Editor**

---

You may request that a specific editor be assigned to your submission. The request will be taken under advisement by the publication. If you do not request an editor, your submission will be assigned to the appropriate editor(s) as determined by the publication staff.

---

No Request

No Request  
Charles Critic, Editor  
Ann Associate, Editor

# Additional Information

## Questionnaire

Please enter the **Word Count** of your manuscript

Answer  
Required:

Have you submitted this manuscript to another publication?

- Please select a response
- No
- Yes

How proud of this submission are you on a scale of 1 to 5, 1 being the lowest and 5 the highest?

- Please select a response
- 1
- 2
- 3
- 4
- 5

- Journal creates custom questions and add to Author and Submission Questionnaires
  - Configured in a variety of ways
  - optional or required



# Additional Information Continued

- Flags can also be set to go off for specific answers

Are you submitting this paper on behalf of someone else?

Instructions

No - This is my own paper. ▼

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

Answer  
Required:

Yes ▼

Please type your name in the box to demonstrate that you can.

Answer  
Required:

Character Count: 10  
Bobby Hill Limit 200 characters



# Comments

- The Author may also enter comments for the editorial office to consider



[Insert Special Character](#)

**- Enter Comments**

Please enter any additional comments you would like to send to the publication office. These comments will not appear directly in your submission.

This is a test comment.



# Manuscript Data: Xtract

**Title**

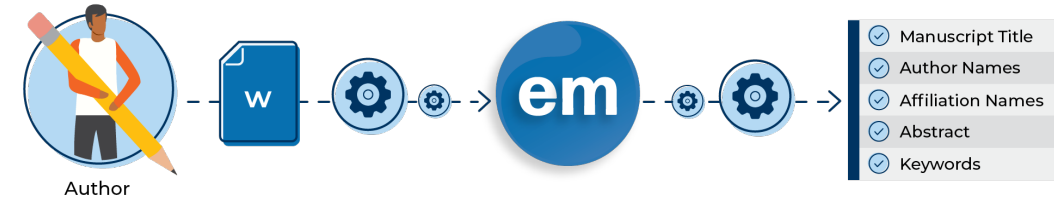
**Full Title** (required) ✓  
*Limit 300 characters* Character Count: 26

This is a good EMUG title.

**Secondary Full Title**

**Short Title**  
*Limit 20 words*

- Automatic extraction of key metadata from manuscript:
  - Title, abstract, Author names, keywords, etc.
- Can be edited or entered manually



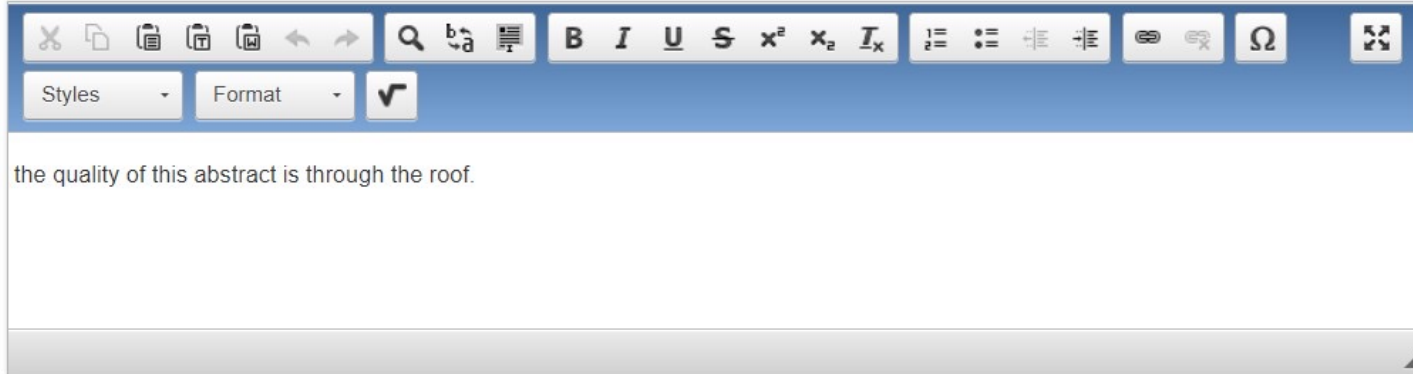


# Manuscript Data Continued

## Abstract (required) ✓

Limit 100 words

Word Count: 9



the quality of this abstract is through the roof.

Limit 3 Keywords

Keyword Count:3

quality; motorcycles; zen

## Current Author List

+ Add Another Author

Mr. Bobby Jeffrey Hill [Corresponding Author] [First Author] [You]

+ Add Another Author

## Keywords:

- Free form terms used to identify areas of study; can add limits
- Useful when classifications alone do not do the trick; searchable




## Author Names:

- The Author at the top of the list is the first Author
- Corresponding Author must be registered in EM



# Author Field

**Edit Author Details** ✕

   **Peggy Hill**

[Insert Special Characters](#)

**Given/First Name\***

Middle Name

**Family/Last Name\***


Academic Degree(s)

Affiliation



**E-mail Address\***

ORCID  [Fetch](#)

[What is ORCID?](#)

Contributor Roles  [Click here to select roles](#)

This is the corresponding author

Contributor Roles  

Conceptualization

Data curation

Formal analysis

Funding acquisition

[Instructions](#)

Lead

Equal

- Co-Authors can be added and set as corresponding Author
- Contributor Roles can be enabled to specify what each Author contributed to the submission (CRediT Taxonomy)
- Degree of contribution can be specified



# Funding Information

**Required \***





**Current Funding Sources List** + Add a Funding Source

*There are currently no Funding Sources in the list*

**+ Add a Funding Source**

**Funding information is not available.**

**Add New Funding Source** ✕

    Insert Special Characters

Find a Funder:

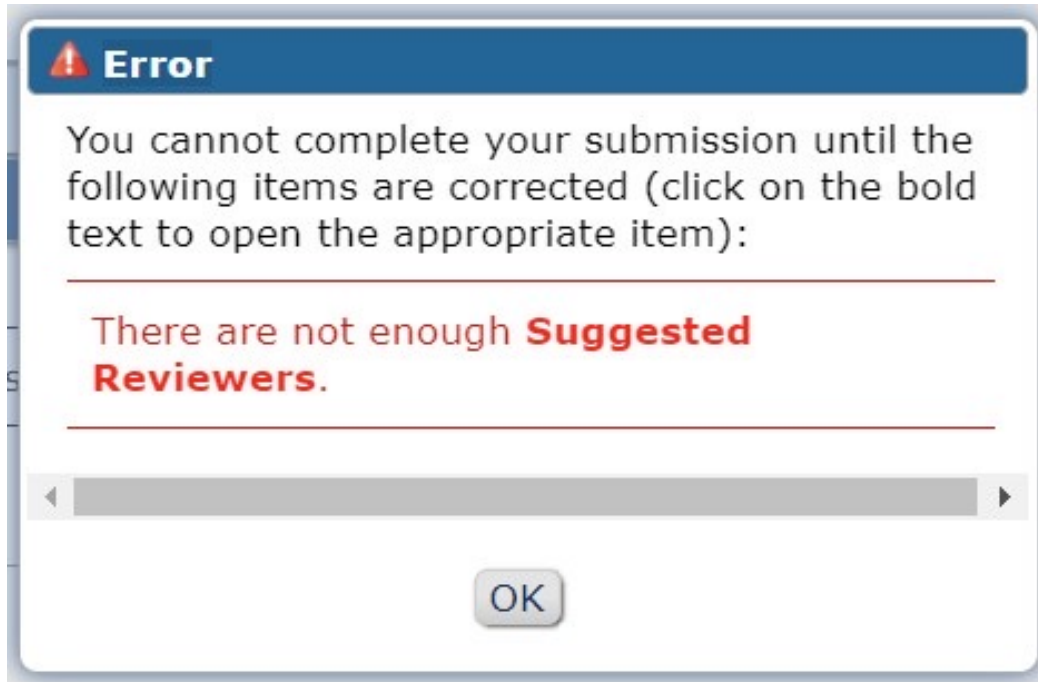
Award Number:

Grant Recipient:  ▼

- Funding information can be added as a step, either required or optional
- Crossref Open Funder Registry
- If the step is required but no information can be given, then "Funding information is not available" can be checked








# Step Warning



- Warns Author when a required part of the submission process is skipped
- The Author will receive a pop-up box when attempting to build without resolving the issue

# Building the PDF






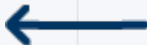

Action 	Title 	Date Submission Began 	Status Date 	Current Status 	This column header can be customized with links to outside websites e.g. ethical rules etc.
View Submission Edit Submission Approve Submission Remove Submission Correspondence Send E-mail	this is a good EMUG title.	Apr 06, 2023	Apr 10, 2023	Needs Approval	<input type="checkbox"/> I accept

**Build PDF for Approval** 

- Users can build PDFs once all steps are complete
- Two PDFs are built – an Author/Editor and Reviewer PDF
- The two are generally different, with the Reviewer's having only essential information




# Approving the PDF

Action 	Title 	Date Submission Began 	Status Date 	Current Status 	This column header can be customized with links to outside websites e.g. ethical rules etc.
<a href="#">View Submission</a>  <a href="#">Edit Submission</a> <a href="#">Approve Submission</a> <a href="#">Remove Submission</a> <a href="#">Correspondence</a> <a href="#">Send E-mail</a>	this is a good EMUG title.	Apr 06, 2023	Apr 10, 2023	Needs Approval	<input checked="" type="checkbox"/> I accept 

- The Author must check the box and view the submission
- The rightmost column header can be customized
- Viewing the submission shows the Author/Editor PDF
- Author/Editor PDF is the cover page followed by submission items in order of how they were attached

Incomplete Submissions (4)

Submissions Waiting for Author's Approval (0)

Submissions Being Processed (2) 





# Author/Editor vs Reviewer

EMUG Demo Site  
this is a good EMUG title.  
--Manuscript Draft--

Manuscript Number:	
Full Title:	this is a good EMUG title.
Short Title:	
Article Type:	EMUG Demo
Section/Category:	Basic Science Section
Keywords:	quality; motorcycles; zen
Corresponding Author:	Bobby Jeffrey Hill UNITED STATES
Corresponding Author Secondary Information:	
Corresponding Author's Institution:	
Corresponding Author's Secondary Institution:	
First Author:	Bobby Jeffrey Hill
First Author Secondary Information:	
Order of Authors:	Bobby Jeffrey Hill Peggy Hill
Order of Authors Secondary Information:	
Manuscript Region of Origin:	UNITED STATES
Abstract:	the quality of this abstract is through the roof.
Suggested Reviewers:	Ricky Reviewer rickyreviewer@ariestrash.com

EMUG Demo Site  
this is a good EMUG title.  
--Manuscript Draft--

Manuscript Number:	
Full Title:	this is a good EMUG title.
Article Type:	EMUG Demo
Section/Category:	Basic Science Section
Keywords:	quality; motorcycles; zen
Manuscript Region of Origin:	UNITED STATES
Abstract:	the quality of this abstract is through the roof.

- Editor roles can have access to both types of PDFs — Author/Editor and Reviewer PDF
- Items on PDFs can be changed
- Watermarks can be added if desired







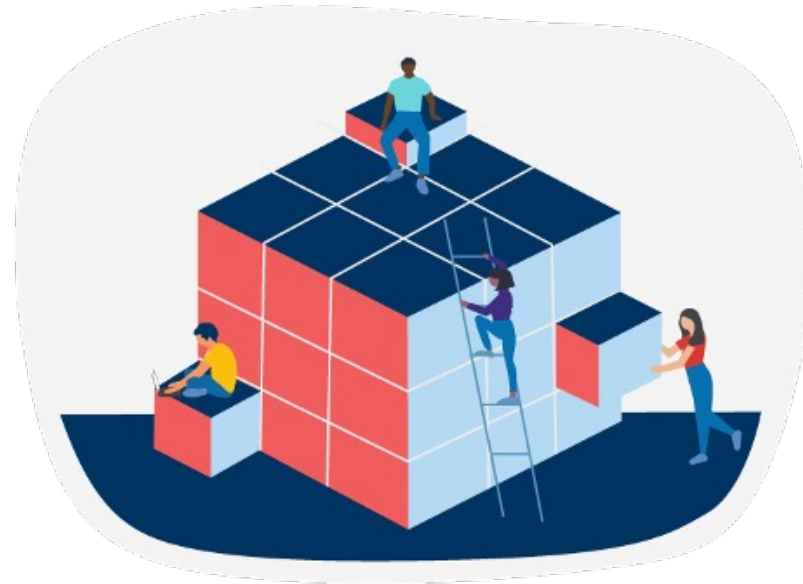
# Overview of Editorial Workflow

*Editor Triage & Assignment*

# Assigning an Editor

## Editor Interface

- Where is the assignment received?
- Technical checks (if required)
- Selecting an Editor
- Editor terminology
- Overview of the Details page



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# Editor Main Menu

## Editor 'To-Do' List

My Pending Assignments (5)

- [New Submissions \(2\)](#)
- Revised Submissions (0)
- [New Submissions Requiring Assignment \(2\)](#)
- [Revised Submissions Requiring Assignment \(1\)](#)
- New Assignments (0)

### New Submissions - mary mary

**Contents:** These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort

Page: 1 of 1 (2 total submissions) 1

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date	Status Date	Current Status
<a href="#">Set Final Disposition</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>								
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (0%)</a> <a href="#">Details ▾</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Check</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Send Back to Author</a> <a href="#">Remove Submission</a> <a href="#">Classifications</a> <a href="#">Set Final Disposition</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>		EMUG Demo	Basic Science Section	this is a good EMUG title.	Bobby Jeffrey Hill	Apr 11, 2023	Apr 11, 2023	Manuscript Submitted

- Submissions either go to the "New Submissions" or "New Submissions Requiring Assignment" folder
- Clicking either will navigate users to a submissions grid
- Signposting (colored bars of green, yellow, or red) signal Warning Thresholds



# Technical Check

**Technical Check**

**This is a test title.** ▾

Original Submission

[View Submission](#)  
[Technical Check History](#)  
[Author Status](#)  
[Duplicate Submission Check \(13%\)](#)

Please check for the following items before proceeding:

- 1) A cover page
- 2) A page for references
- 3) Footers

Technical Check Incomplete  
 Technical Check Complete

**Technical Comments to Author**

# Assigning an Editor

- Accessible from the "Assign Editor" action link
- Select Editors based on a variety of factors and block Editors

## Assign Editor

**Title:** this is a good EMUG title.

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](#)

**Manuscript Classifications**

(1) Vehicles; (2) Veggies; (3) Car

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Editor	Ann Associate	0	1	2	Yes
<input checked="" type="radio"/>	Editor	Charles Critic	0	2	1, 3	Yes
<input type="radio"/>	Editor	Sally Solicitor	0	1	1	Yes
<input type="radio"/>	Managing Editor	mary mary	0	0		Yes



# Example Editor Chain

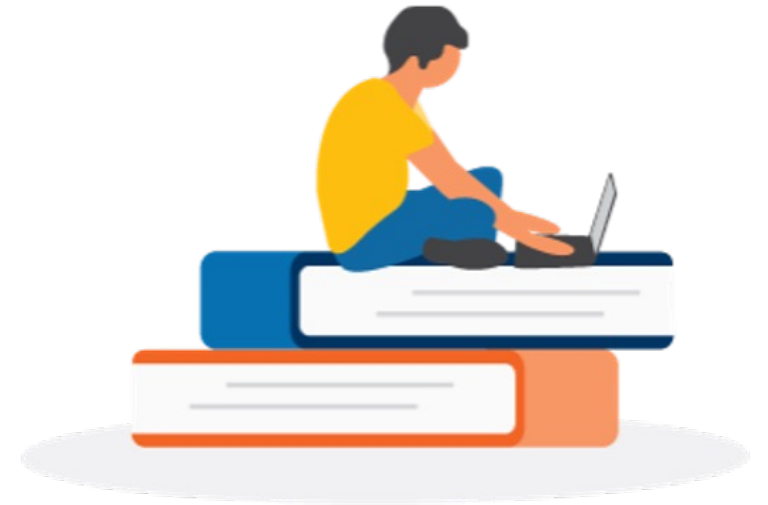
- Assign multiple Editors to form a chain; can be done in one step with predefined Editor chain
- Last in chain (Sally Solicitor) is the Handling Editor

Editors		<a href="#">Top</a>
<b>Name:</b>	Edward Editor <a href="#">[Proxy]</a>	
<b>Role:</b>	Editor-in-Chief	
<b>Date Assigned:</b>	Apr 11, 2023	
<b>Date Completed:</b>		
<b>Elapsed Days:</b>	0	
<b>Recommendation:</b>		
<hr/>		
<b>Name:</b>	Charles Critic <a href="#">[Proxy]</a>	
<b>Role:</b>	Editor	
<b>Date Assigned:</b>	Apr 11, 2023	
<b>Date Completed:</b>		
<b>Elapsed Days:</b>	0	
<b>Recommendation:</b>		
<hr/>		
<b>Name:</b>	Sally Solicitor <a href="#">[Proxy]</a>	
<b>Role:</b>	Editor	
<b>Date Assigned:</b>	Apr 11, 2023	
<b>Date Completed:</b>		
<b>Elapsed Days:</b>	0	
<b>Recommendation:</b>		



# Different Types of Editors

- **Attached Editor:** Editor (typically an editorial office person) who picks up the submission and assigns to the first Editor. Has a "special relationship" to the submission
- **First Editor:** Editor first assigned the submission. May be the Handling Editor as well
- **Handling Editor:** Editor handling the submission at the time. Has current responsibility
- **Assigned Editor:** any Editor assigned the submission. In Editor chain in Details page. Can be First, Handling, or any other Editor type
- **Corresponding Editor:** Editor responsible for communication. Typically, First Editor, unless this is changed in "Details" or "PolicyManager"





# Detail of Details Page

## Details for Manuscript Number: EMUGDEMO-D-23-00002 "this is a good EMUG title."

[Cancel](#) [Save](#) [Save and Close](#)

<a href="#">Abstract</a> <a href="#">Manuscript Notes</a> <a href="#">Production Notes</a> <a href="#">Editors</a> <a href="#">Reviewers</a> <a href="#">Alternate Reviewers</a> <a href="#">Reviewers Proposed by Editors</a> <a href="#">Additional Information</a>	
<b>Corresponding Author:</b>	Bobby Jeffrey Hill UNITED STATES <a href="#">[Proxy]</a>
<b>Corresponding Author E-Mail:</b>	bobbyhill@ariestrash.com
<b>Author Comments:</b>	<input type="text" value="This is a test comment."/> <a href="#">Insert Special Character</a>
<b>Other Authors:</b>	Peggy Hill <a href="#">Author Status</a>
<b>Author Questionnaire Summary:</b>	<a href="#">View Author Questionnaire Summary</a>
<b>Short Title:</b>	
<b>Article Type:</b>	EMUG Demo
<b>Section/Category:</b>	Basic Science Section
<b>Keywords:</b>	quality; motorcycles; zen
<b>Classifications:</b>	Vehicles; Car; Veggies
<b>Requested Editor:</b>	
<b>Technical Check:</b>	<a href="#">Technical Check Information</a>
<b>Initial Date Submitted:</b>	Apr 11, 2023
<b>Editorial Status Date:</b>	Apr 11, 2023
<b>Duplicate Submission Check:</b>	<a href="#">Duplicate Submission Check (0%)</a>
<b>Current Editorial Status:</b>	With Editor
<b>Transfer Offer Expiration Date:</b>	
<b>Attachments:</b>	<a href="#">Attachments</a>
<b>Submission Target Publication Date:</b>	<input type="text"/> (mm/dd/yyyy)
<b>Submission Target Volume:</b>	<input type="text"/>
<b>Submission Target Issue:</b>	<input type="text"/>

- Details Page: accessible via Action Links
- Contains key pieces of information: corresponding Author, editorial status, classifications, etc.
- Configurable



# Live Walkthrough

## Reviewer Selection Summary

- [Reviewer Selection Summary.mkv](#) (with audio)



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# Overview of Editorial Workflow

*Reviewer Invitation & Submission*

# Reviewer Search & Selection

## Editor Interface

- Reviewer Search & Selection Options
- Custom Classifications & API Database Integration
- Reviewer Statistics
- Multiple Options for Inviting/Assigning Reviewers
- Automatic Reminders & Notifications



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# Reviewer Selection Summary (RSS)

- Accessible from "Invite Reviewers" Action Link
- Manage and Search for Reviewers
- Edit Review Parameters (Due Dates and # of Reviews Req.)

## Invite Reviewers Menu

Review Settings - [Edit](#)

Required Reviews - 2

Uninvite After - 0 days

Unassign After - 0 days

View Submission Information

[Manuscript Details](#) ▾

[History](#)

Quick Action Links

[Submit Editor's Decision and Comments](#)

[Send E-mail](#)

[Register and Select New Reviewer](#)

Set Preferences

[My Suggest Reviewer Preferences](#)

[My Reviewer Display Preferences](#)

## ← Reviewer Selection Summary - Submission EMUGDEMO-D-23-00003

### Search Type

**My Publication**

Personal Classifications

Suggest Reviewers

Classification Matches

Criterion

Is/Is not

Selector

Value

Last Name ▾

is ▾

Begins With ▾

Add Search Option +

Search

### Review Status

Invited Reviewers (0)



# Reviewer Selection Results

## Invitation Options

- **Assigning Reviewers**
  - Assumes the Reviewer has already agreed to review
- **Alternate Reviewers**
  - Allows users to automatically promote Reviewers if others decline
  - Can be linked to specific invited Reviewers
- **Proposed Reviewers**
  - Allows an Editor to create a list of potential Reviewers who can be registered or invited later



Select As			
Inv.	Asn.	Alt.	Prop.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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# Reviewer Search

## Standard Search

- Standard Search – first/last, email, etc.
- Multiple search parameters with Logic

Search Type

My Publication Personal Classifications Suggest Reviewers Classification Matches

Criterion	Is/Is not	Selector	Value	
Last Name	is	Contains	Reviewer	OR
Last Name	is	Begins With		

Add Search Option +

Search

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# Reviewer Search

## Suggested by Author

- Searches database for existing users
- A link to register users without accounts

Search Type

[My Publication](#)

[Suggested by Author](#)

[Personal Classifications](#)

[Suggest Reviewers](#)

Suggested Reviewers (3)	Email	
Richard Reviewer	sample1@ariessys.com	
Peter Leary	pleary@ariessys.com	<a href="#">Register Reviewer</a>
Michael Parke	mparke@ariessys.com	<a href="#">Register Reviewer</a>

[Select Suggested Reviewers](#)

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# Reviewer Selection

## Personal Classifications

### Search for Reviewers by Personal Classifications

On the left, below, is the complete list of Classification Terms currently assigned to people in this publication. Classification terms that are not assigned will not appear in the list. If you want to search for potential Reviewer candidates associated with particular Classifications, transfer classifications to the "Selected Classifications" list by checking them and using the "Select->" button, then click "Search for Reviewers" to execute the search. A maximum of 5 Classifications may be selected in any given search.

[Manuscript Details](#)  [Register and Select New Reviewer](#)

#### Reviewer Search

Search My Publication        from    

[Help with Searching](#)

The Classifications for this manuscript are:  
[Biology](#) [Mammal](#)



# Reviewer Selection



## Personal Classifications

### Search for Reviewers by Personal Classifications

On the left, below, is the complete list of Classification Terms currently assigned to people in this publication. Classification terms that are not assigned will not appear in the list. If you want to search for potential Reviewer candidates associated with particular Classifications, transfer classifications to the "Selected Classifications" list by checking them and using the "Select->" button, then click "Search for Reviewers" to execute the search. A maximum of 5 Classifications may be selected in any given search.

[Manuscript Details](#)  [Register and Select New Reviewer](#)

#### Reviewer Search

Search My Publication    Search by Personal Classifications     from All Reviewers    

[Help with Searching](#)

The Classifications for this manuscript are:  
20: [Biology](#) 40: [EMUG Bootcamp](#)

Search:        

[Matching terms display in red text]

[Expand All](#)

- 10: **Vehicles**
- 20: **Biology**
- 30: **Veggies**
- 40: **EMUG Bootcamp**

**Selected Classifications:** Limit 5 Classifications

- 20: **Biology**
- 40: **EMUG Bootcamp**

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# Reviewer Selection

## Suggest Reviewers

(Custom Saved Search)

### My Suggest Reviewer Preferences

Exclude the following from your search results:

People from the same institution

People from the same city

People with unavailable dates within the next  days

People with more than  pending reviews

People with fewer than  matches to manuscript classifications

Sort the Suggest Reviewer search results in order of importance by:

Reorder List	
<input type="text" value="1"/>	Board membership
<input type="text" value="2"/>	Number of matches to manuscript classifications
<input type="text" value="3"/>	Number of pending reviews
<input type="text" value="4"/>	Average number of days reviews are outstanding
<input type="text" value="5"/>	Date last review completed
<input type="text" value="6"/>	Average Review Rating (Highest Ratings listed first)
<input type="text" value="7"/>	Total Number of Completed Reviews (Highest number displayed first)

Cancel

Submit



# Reviewer Selection: Results

## Suggest Reviewer Entire Database - Manuscript Number EMUGDEMO-D-23-00003 Sally Solicitor Stock Paper 2

[Manuscript Details](#) [Register and Select New Reviewer](#)

**Change Search Type**

Search My Publication
 
 from

### Reviewer Candidates

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

Page: 1 of 1 (1 total Reviewers)

Results per page 10

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:	Total Invitations:																	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Robert Reviewer (Reviewer)  trash18@ariessc.com	No	<b>2 Class match with MS</b> * 20: Biology * 40: EMUG Bootcamp	Reviews in Progress:	0	Completed Reviews:	0	Un-assigned After Agreeing:	0	Terminated After Agreeing:	0	Last Review Agreed:	-	Last Review Completed:	-	Last Review Declined:	-	Avg Days Outstanding:	0	Manuscript Rating:	0	Avg Review Rating:	0.0	Date Last Invited:	-	Outstanding Invitations:	0	Agreed:	0	Declined:	0	Un-invited Before Agreeing:	0	Terminated:	0	Total Invitations:	0



# Reviewer Selection: Notifications

## Notification / Due Date Options

### Select Reviewers - Confirm Selection and Customize Letters Submission EMUGDEMO-D-23-00003 Sally Solicitor "Stock Paper 2"

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

#### Reviewers to Assign

Name	Letter	Due Date	Do Not Assign
<a href="#">Olivia Opinion</a> (Reviewer)	Reviewer Assignment <a href="#">Customize</a>	05/19/2023 (mm/dd/yyyy)	<input type="checkbox"/>

#### Reviewers to Invite

Name	Letter	Due Date	Do Not Invite
<a href="#">Charles Critic</a> (Reviewer)	Reviewer Invitation <a href="#">Customize</a>	05/19/2023 (mm/dd/yyyy)	<input type="checkbox"/>

#### Alternate Reviewers

Name	Letter	Days to Review	Do Not Use
<a href="#">Randy Researcher</a> (Reviewer)	Reviewer Invitation <a href="#">Customize</a>	14	<input type="checkbox"/>

#### Proposed Reviewers

Name	Notes	Do Not Use
<a href="#">Robert Reviewer</a> Reviewer	<input type="text" value="Possible Alternate?"/> <a href="#">Open in New Window</a>	<input type="checkbox"/>

- Automatic notification system
- Customizable notification templates
- Change review due dates



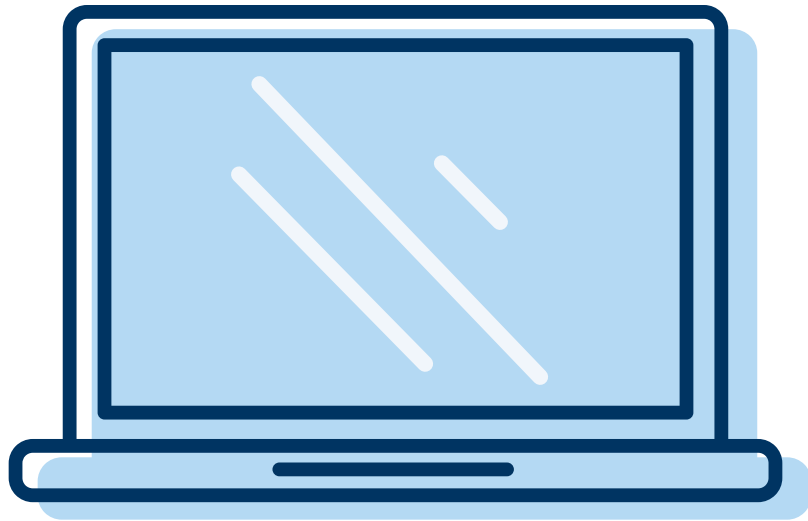
# Reviewer Selection: Summary

## Review Status

Invited Reviewers (2)					
Olivia Opinion (Reviewer)	Agreed to Review May 05, 2023		Send Reminder	Unassign Reviewer	
Amy Analyst (Reviewer)	Reviewer Invited May 05, 2023		Send Reminder	Uninvite Reviewer	
Alternate Reviewers (1)					
Randy Researcher (Reviewer)				↑ ↻ 🗑️	
Alternate Reviewer Invitation Letters					
Proposed Reviewers (1)		Proposed By	Date Proposed	Notes	Display Proposed Reviewer Flag <input checked="" type="checkbox"/>
Ricky Reviewer (Reviewer)	mary mary		May 05, 2023		Invite 🗑️







# Reviewer Forms

*Customize Reviewer Feedback*

# Reviewer Recommendation Terms

- Select a recommendation term (customizable)
- Overall rating of the manuscript

Stock Paper 2

Original Submission  
Olivia Opinion (Reviewer 1)

Recommendation:  Overall Manuscript Rating (1-100):

Accept  
Minor Revision  
Major Revision  
Reject



# Custom Reviewer Questions/Fields

- Create Custom Review Questions
  - Multiple input options (list, buttons, open response)
  - Required vs optional
  - Can be automatically included in Author decision letter

### Review Questions

\*Are you willing to review the revision of this manuscript?

---

Sample Question #1 (Limit 200 Characters)

Character Count: 0

---

Sample Question #2 (List)

---

Sample Question #3 (Yes/No with Followup)

Explain in detail (Limit 2000 Characters)

Character Count: 0



# Review Form: Comments & Attachments

- Comment Boxes
  - Customize starting/instructional text
  - Confidential comments to Editorial Staff

- Optional Attachments

Upload Reviewer Attachments for Manuscript Number EMUGDEMO-D-23-00003  
"Stock Paper 2"

Enter a Description, Browse and Attach to select any additional material or annotated information you wish to include in your review.

Description:  [Insert Special Character](#)

File Name:

No files are attached.

## Reviewer Comments to Author

Save text instructions here:

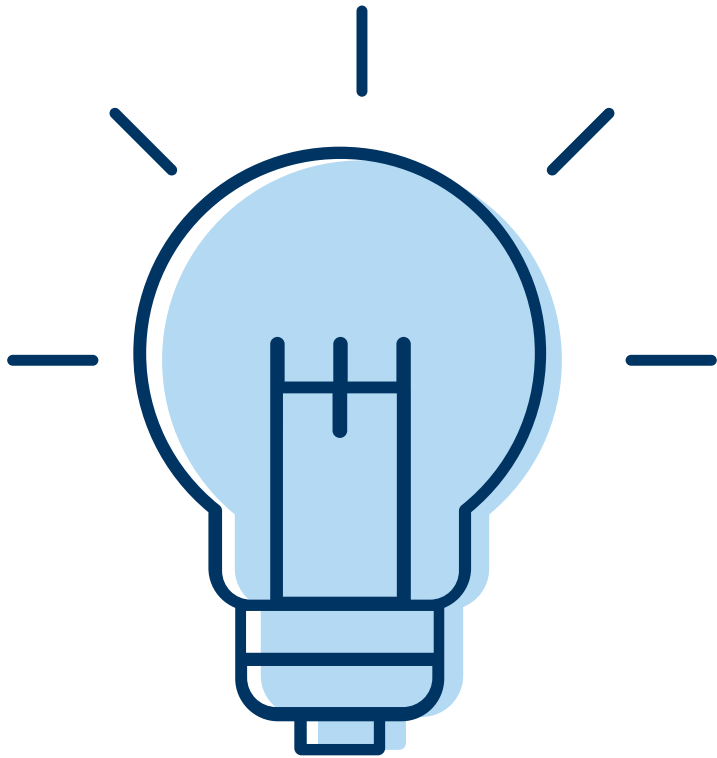
## Reviewer Confidential Comments to Editor

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

YES \_\_\_ NO \_\_\_

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





# Overview of Editorial Workflows

*Editor Decision and Comments*

# Making a Decision

## Editor Interface

- When all reviews are completed, the Editor is notified via a letter
- Editors use the “View Reviews and Comments” action link to review the responses
- All recommendations, comments, ratings, and attachments from Reviewers are collected in one place



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# View Reviews & Comments

Close

**View Reviews and Comments for Manuscript**  
EMUGDEMO-D-23-00003  
"Stock Paper 2"  
Original Submission

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

[Attachments \(0\)](#) [View Manuscript Rating Card](#) [View Review Question Responses](#)

	Original Submission
<a href="#">Olivia Opinion (Reviewer 1)</a>	<a href="#">Accept</a>
<a href="#">Amy Analyst (Reviewer 2)</a>	<a href="#">Accept</a>
<a href="#">mary mary (Managing Editor)</a>	
<a href="#">Author Decision Letter</a>	
<a href="#">Sally Solicitor (Author)</a>	



- Accessible via "View Reviews and Comments" action link

EMUGDEMO-D-23-00003  
"Stock Paper 2"  
Original Submission

**Amy Analyst (Reviewer 2)**  
[Edit Reviewer Comments](#)

<b>Reviewer Recommendation Term:</b>	Accept
<b>Overall Reviewer Manuscript Rating:</b>	95
<b>Rate Review:</b>	<input type="text" value="95"/> Please enter a number from 1-100

Custom Review Question(s):	Response
Are you willing to review the revision of this manuscript?	Yes
Sample Question #1	Looks Good!
Sample Question #2 (List)	B
Sample Question #3 (Yes/No with Followup)	Yes

**Comments to Editor:**

Is there a financial or other conflict of interest between your work and that of the authors?  
YES \_\_\_ NO x

Please give a frank account of the strengths and weaknesses of the article:  
No weaknesses!

**Comments to Author:**

Should accept!

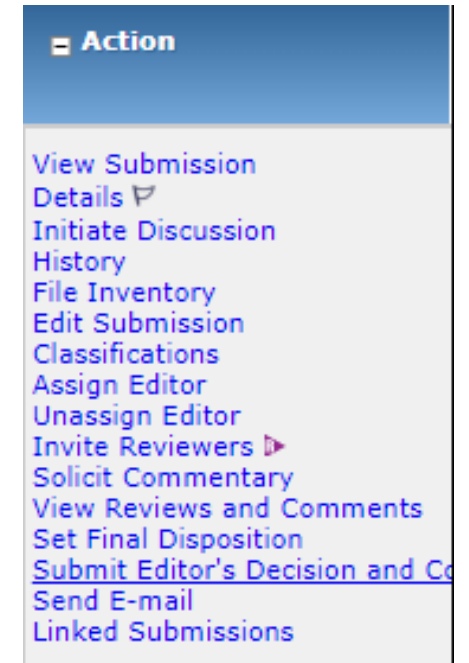
[More Reviewer Details](#)

Cancel Re-open Review Save and Close

# Submit Editor's Decision

## Manuscript Disposition

- Assigned Editor with permissions can make a decision at any time
- Editors with permissions can terminate outstanding Editor/Reviewer assignments to proceed with the decision
- Two parts to making a decision in EM:
  - Editor Decision
  - Notify the Author
- Editor can “Draft & Save Decision” for another Editor in Chain
  - Ability to notify the Author of a decision is an Editor permission



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# Completing Editor Decision Form

EMUGDEMO-D-23-00003

**Stock Paper 2**

Original Submission  
mary mary (Managing Editor)

Decision:

[Details](#) [History](#) [Attachments \(0\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Review Question Responses](#) [Send E-mail](#)

	Original Submission
Olivia Opinion (Reviewer 1)	Accept
Amy Analyst (Reviewer 2)	Accept
mary mary (Managing Editor)	Assigned - No Decision
Author Decision Letter	
Sally Solicitor (Author)	

The author has  days to revise this submission.

**Confidential Comments to Editor**

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

Reviewer, Olivia Opinion: Is there a financial or other conflict of interest between your work and that of the authors?  
YES  NO   
Please give a frank account of the strengths and weaknesses of the article:  
Strong research. Writing had some typos.

Reviewer, Amy Analyst: Is there a financial or other conflict of interest between your work and that of the authors?  
YES  NO   
Please give a frank account of the strengths and weaknesses of the article:  
No weaknesses!

**Comments to Author**

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

Reviewer #1: Great job, I think this is all set!

Reviewer #2: Should accept!

- Select Editor Decision Phrase
  - Decision phrases can be customized by the journal
- View Reviews & Alternate Reviewer Comments



# Author Decision Letter

- Custom Notification Templates for each Decision Term
- Automatic inclusion of Reviewer Feedback
- Save Decision for Editorial Review

## Notify Author

**Manuscript Number:** EMUGDEMO-D-23-00003

**Title:** Stock Paper 2

To finalize your decision and notify the author, use the 'Send Now' button.

If you wish to submit your decision to the next editor for review before the author is notified, use the 'Submit Decision without Notifying Author' button.

Editor Decision:	Accept
Modify Decision:	Accept ▾
From:	The Journal <trashjo@ariessys.com>
To:	Sally Solicitor
Letter Purpose:	Editor Decision - Accept
Letter Subject:	Your Submission

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

	cc:	bcc:	
			Editors Assigned to Manuscript
	<input type="checkbox"/>	<input type="checkbox"/>	mary mary (Managing Editor)
	cc:		<input type="text"/>
	bcc:		<input type="text"/>



# Author Decision Letter

- Merge Fields automatically insert key content and context into letters (names, dates, feedback)
- Blinded review feedback
- Make necessary changes
- Save notification draft for Supervising Editor if needed

Ref.: Ms. No. EMUGDEMO-D-23-00003  
Stock Paper 2  
EMUG Demo Site

Dear %TITLE% %LAST\_NAME%,

I am pleased to tell you that your work has now been accepted for publication in EMUG Demo Site.

It was accepted on %FINAL\_EDITOR\_DECISION\_DATE%

Comments from the Editor and Reviewers can be found below.

Thank you for submitting your work to this journal.

With kind regards

mary mary  
Managing Editor  
EMUG Demo Site

Comments from the Editors and Reviewers:

Reviewer #1: Great job, I think this is all set!

Reviewer #2: Should accept!



# After Acceptance: Initiate Production!

- Following manuscript acceptance, transfer to downstream to initial production and publication
- EM seamlessly connects with ProduXion Manager (PM) and other systems for a true end-to-end solution!





# Searching People & Submissions

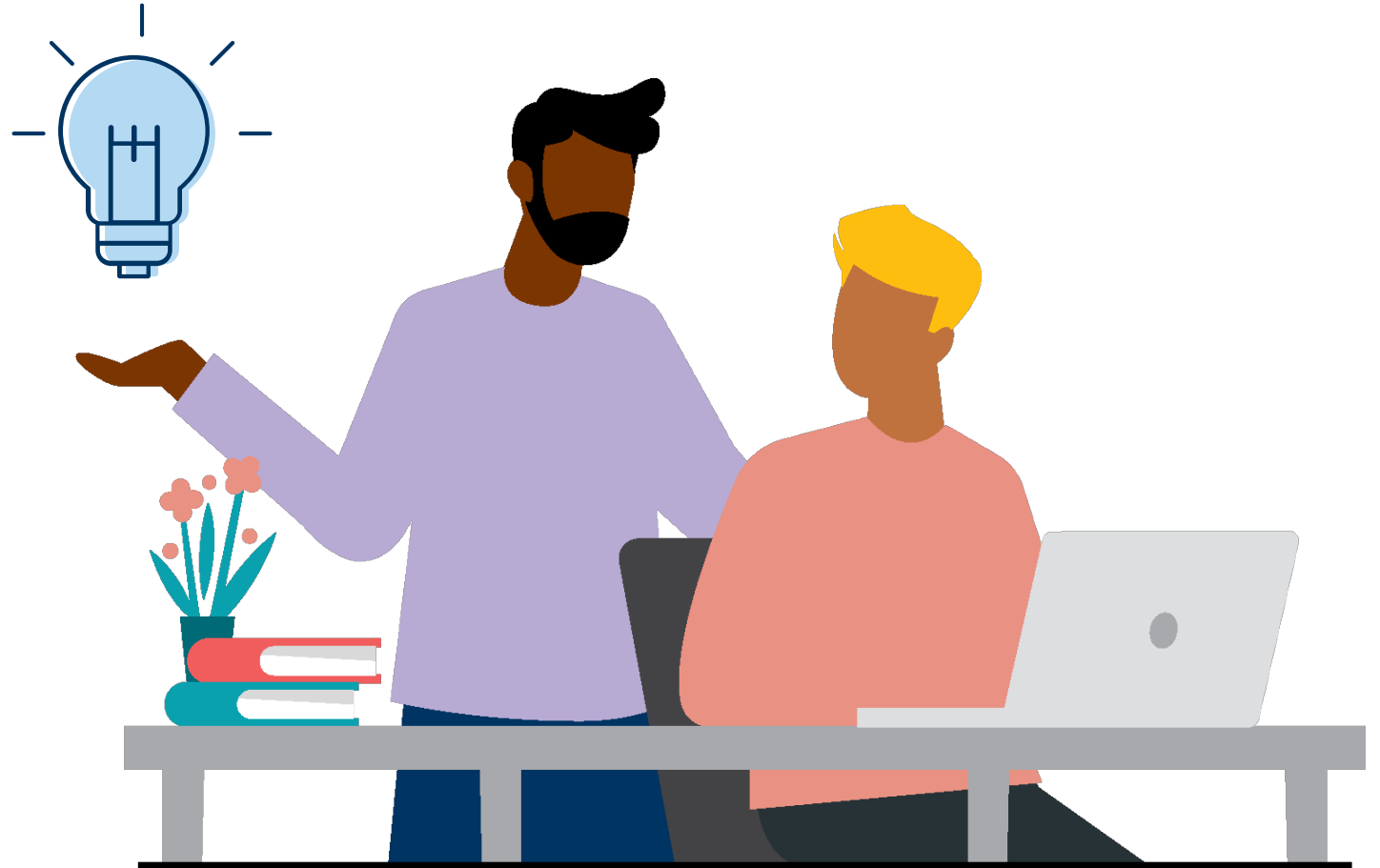
*Surfacing key information*

# Live Walkthrough

## Searching People & Manuscripts

Proprietary & Confidential

[Search Function.mkv](#)



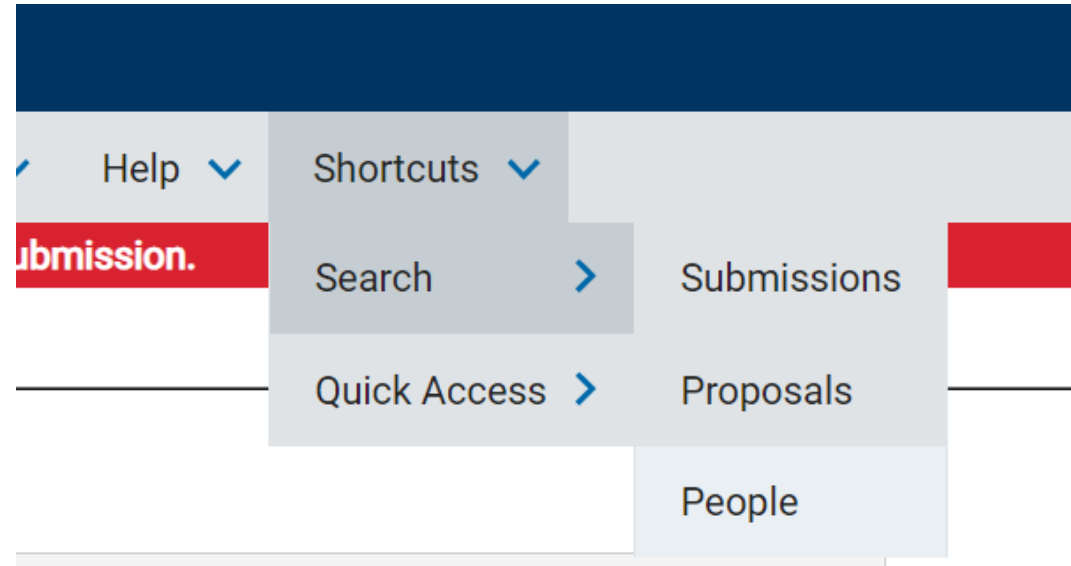
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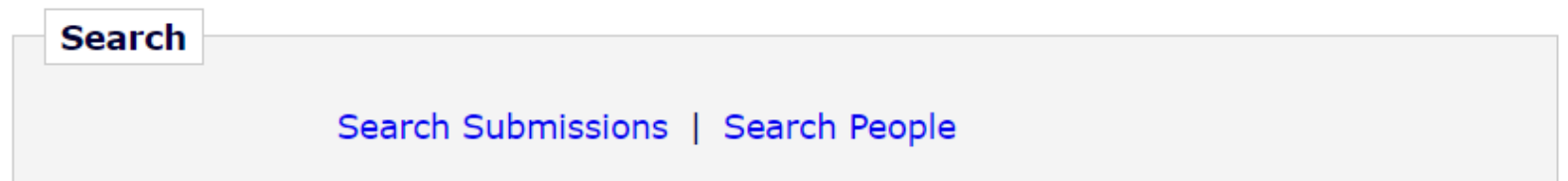
# Searching

## Where to start?

- Navigation Bar: Shortcuts Menu



- Editor Main Menu



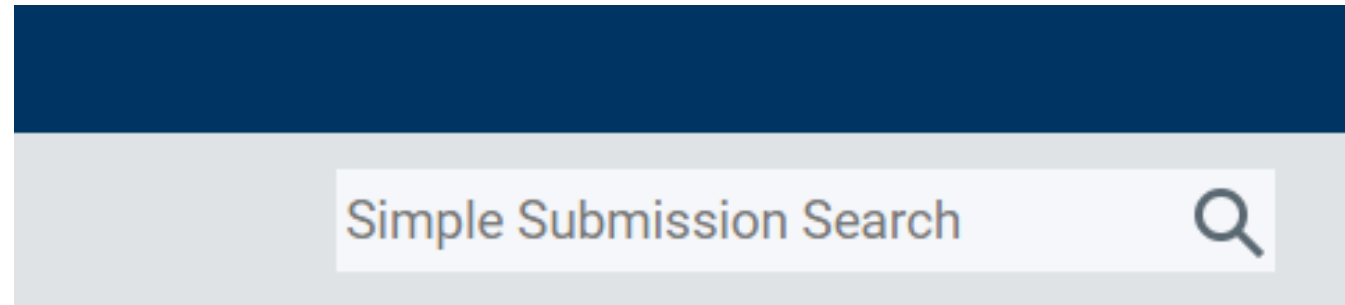
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# Search Submissions

- Simple Search:

- NavBar
- Author Name
- Article Title
- Manuscript Number



## Search submissions selection criteria

- Custom Search:

- Multiple Search Criteria
- Advanced Criteria
- Saved Searches
- Shared Searches

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:

[Help with Searching](#) [Insert Special Character](#) [Value Options](#) [Advanced Criteria](#)

(	Criterion	Is/Is not	Selector	Value	)
	<input type="text" value="Manuscript Number"/>	<input type="text" value="is"/>	<input type="text" value="Contains"/>	<input type="text"/>	
					<input type="button" value="Add"/>





# Search Submission Results

Search for All Submissions by inputting a value of "\*spacebar\*"

## Search Submissions - Search Results

Manuscript Number is containing ' '



Page: 1 of 1 (8 total submissions)

1

10 results per page.

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classification	Current Status	Status Date	Initial Date Submitted	Review
<a href="#">Action Links</a> 🔽	EMUGDEMO-D-23-00001R1		Sally Solicitor	Stock Paper 3 (but really a photo)	Rapid Communicat				Revised Manuscript Submitted	Apr 11, 2023	Apr 11, 2023	
<a href="#">Action Links</a> 🔽 (0%)	EMUGDEMO-D-23-00002		Bobby Jeffrey Hill	this is a good EMUG title.	EMUG Demo		quality;motorcy	10: Vehicles 10.200: Car 30: Veggies	With Editor	Apr 11, 2023	Apr 11, 2023	
<a href="#">Action Links</a> 🔽	EMUGDEMO-D-23-00003		Sally Solicitor	Stock Paper 2	Editorial			20: Biology 40: EMUG Bootcam	Required Reviews Completed	May 05, 2023	Apr 11, 2023	Amy Anal Olivia Op *
<a href="#">Action Links</a> 🔽	EMUGDEMO-D-23-00004		Archie Assistant	This is the Citrus Fruit	Rapid Communicat			20: Biology 30: Veggies	Under Review	May 05, 2023	Apr 26, 2023	Robert Reviewer



# Saved Searches

- Click on the “disk” icon in top left on results page:



- Name your Search:

- Search will appear in Main Menu:

## Save Search Criteria

Check the provided checkbox and click the "Submit" button again to overwrite the existing search with this one. Alternatively, enter a new name for your saved search before proceeding.

Criteria	Search Criteria Name
Manuscript Number is containing ' '	<input type="text" value="Custom Search"/>
	<input checked="" type="checkbox"/> Show this Search in Main Menu

[Back to Search Results](#)  
[New Search](#)  
[Editor Main Menu](#)

## Managing Editor Main Menu

Quick Searches:

[Custom Search](#)

[Demo Search](#)

[EMUG Sample Search](#)



# Search People

- Access to Update People Information
- View & Assign User's Roles
- Proxy as another User
- Correspondence and Activity Histories

## Search People

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 ▼		ALL ▼ END ▼
Last Name	▼ Begins With ▼		END ▼
Last Name	▼ Begins With ▼		



# People Search: Results

- No Saved Search
- Yellow Highlighted Role = Proxy as User
- Blue Name = View and Edit User Records

Page: 1 of 1 (22 total People Matches) Download Search Results Results per page 25

Merge People	Name ▼	City ▲	State or Province ▲	Country ▲	Author Role	Reviewer Role ▲	Editor Role ▲	Publisher Role ▲	View Correspondence History
<input type="checkbox"/>	Sally Solicitor	Milford	Massachusetts	UNITED STATES	[Author]	[Reviewer]	[Editor]		Correspondence History
<input type="checkbox"/>	Robert Reviewer			UNITED STATES	[Author]	[Reviewer]			Correspondence History
<input type="checkbox"/>	Ricky Reviewer			UNITED STATES	[Author]	[Reviewer]			Correspondence History
<input type="checkbox"/>	Randy Researcher			UNITED STATES	[Author]	[Reviewer]			Correspondence History
<input type="checkbox"/>	Remy Referee			UNITED STATES	[Author]	[Reviewer]			Correspondence History
<input type="checkbox"/>	Paul Publisher			UNITED STATES	[Author]				Correspondence History
<input type="checkbox"/>	Olivia Opinion			UNITED STATES	[Author]	[Reviewer]			Correspondence History
<input type="checkbox"/>	mary mary	North Andover	MA.	UNITED STATES	[Author]		[Managing Editor]	[Publisher]	Correspondence History
<input type="checkbox"/>	Greg Maddux			UNITED STATES	[Author]	[Reviewer]			Correspondence History
<input type="checkbox"/>	Bobby Jeffrey Hill			UNITED STATES	[Author]				Correspondence History
<input type="checkbox"/>	Edwin Expert			UNITED STATES	[Author]	[Reviewer]			Correspondence History
<input type="checkbox"/>	Edward Editor	Lowell	Massachusetts	UNITED STATES	[Author]		[Editor-in-Chief]		Correspondence History





# Managing People Records

*Updating User Information*

# Accessing User Records

- Use Search People to locate user records
  - via Editor Main Menu or NavBar Shortcuts menu
- Click user's name to open the user record
- Can “merge” duplicate accounts

Help with Searching      Insert Special Character      Register New User

Criterion	Selector	Value	User Role
Last Name	Begins With	author	ALL
Last Name	Begins With		END
Last Name	Begins With		END

Clear    Search

Download Search Results

Page: 1 of 1 (3 total People Matches)      Display 25 results per page.

Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
<input type="checkbox"/>	Allan Author			UNITED STATES	[Author]			
<input type="checkbox"/>	Abby Author			UNITED STATES	[Author]			
<input type="checkbox"/>	Abby Olivia Author			UNITED STATES	[Author]	[Reviewer]		



# Deactivating Users & Assigning Roles

- “Inactivate this user”
- Assign user roles
- “View Activity Details”

## Search People - Update Information

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

### Robert Reviewer

Import-Registered:  
Mar 03, 2017  
(Data Unconfirmed by User)

Last Modified:  
May 05, 2023

Viewed Privacy Policies:  
*(has not viewed them yet)*

[Inactivate this User](#)

[Anonymize this User](#)

Retain Name

[Send Login Details](#)

\*\*The user will be sent an email with a link to reset their password. The password will not reset until the user clicks that link.

- Exclude this user from receiving all batch and reminder emails:
- Always
  - When Unavailable Dates are active

## User Information

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

Default Login Role:

Author

Default Login Menu

Editorial Menu

Available as a Reviewer?

Yes  No

Board Member?

Yes  No

Forbidden as a Reviewer?

Yes  No

Reviewer Role \*

Reviewer

Publisher Role \*

None

Editorial Role \*

None

Editor Description

[Activity Details](#)

[Correspondence History](#)



# Deactivating Users & Assigning Roles

- Update personal and business-related information, classifications keywords, and people notes
- People notes display for Editors with Reviewer search results
- Users will not see their own people notes

The screenshot displays a user profile management interface with four main sections:

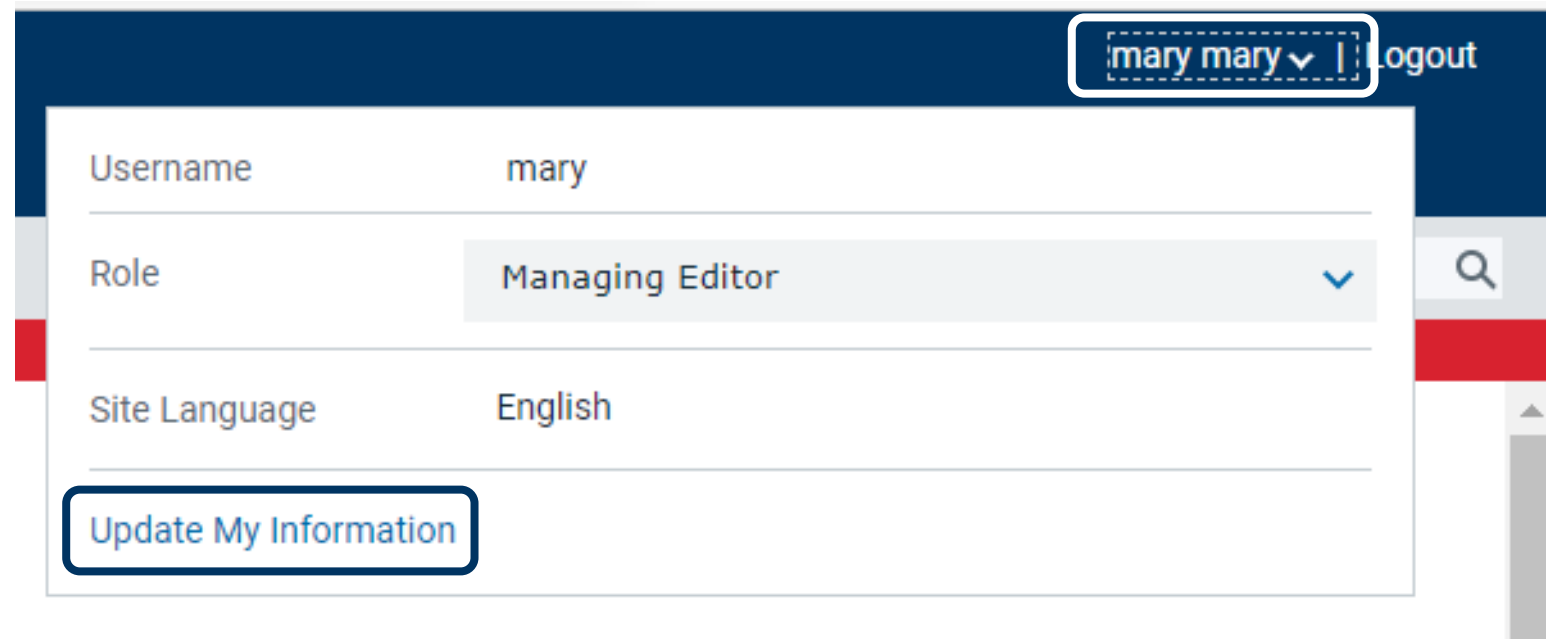
- Personal Information:** Fields for Title, Given/First Name (Abby), Middle Name (Olivia), Family/Last Name (Author), Degree, Preferred Name, Telephone Number, Secondary Phone, Secondary Phone For (Mobile, Beeper, Home, Work, Admin. Asst.), Fax Number, and E-mail Address (trash18@ariessc.com). Includes an ORCID field and a link for "What is ORCID?".
- Institution Related Information:** Fields for Position, Institution (max 300 characters), Department, Street Address (max 450 characters), City, State or Province, Zip or Postal Code, Country or Region (UNITED STATES), and Address is for (Work, Home, Other). Includes buttons for "Alternate Contact Information" and "Unavailable Dates".
- Areas of Interest or Expertise:** Includes a text box with instructions, "Personal Classifications" (1: EMUG Presentations, 1.02: EM Bootcamp) with a "Select Personal Classifications" button, and "Personal Keywords" (None Defined) with an "Edit Personal Keywords" button.
- People Notes:** A large empty text area for notes, with "Cancel" and "Submit" buttons at the bottom.





# Updating User Records

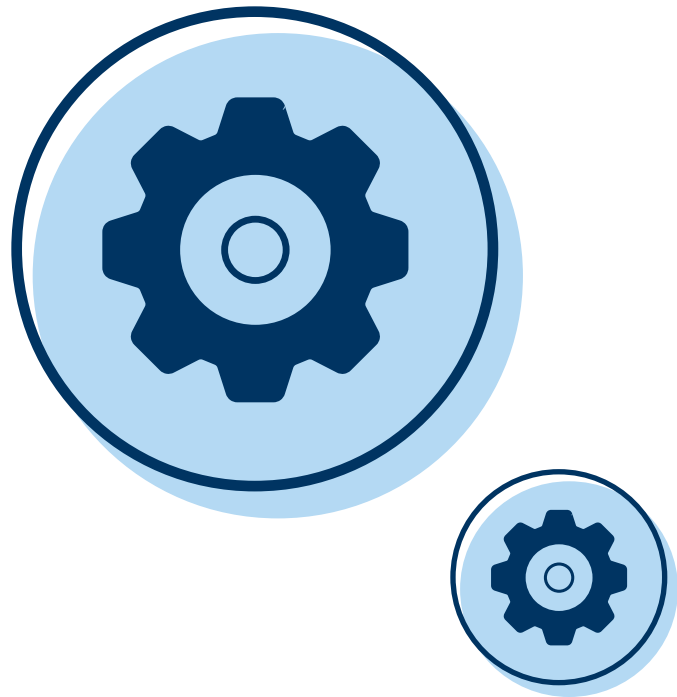
- Users can update information from main navigation bar
- Clicking on name allows Role Swap without logging out
- "Update Information" can be used to change personal & login info



The screenshot shows a user profile dropdown menu. At the top right, the user's name 'mary mary' is displayed with a dropdown arrow, and a 'Logout' link is visible. The profile information is organized into three rows, each with a label on the left and a value on the right:

Username	mary
Role	Managing Editor
Site Language	English

At the bottom of the profile card, there is a blue button labeled 'Update My Information'.



# Reports & Reminders

# Reporting

- Navigate to the bottom of the Editor Main Menu (Admin Functions)
- Custom Reports & Default Reports

## Administrative Functions

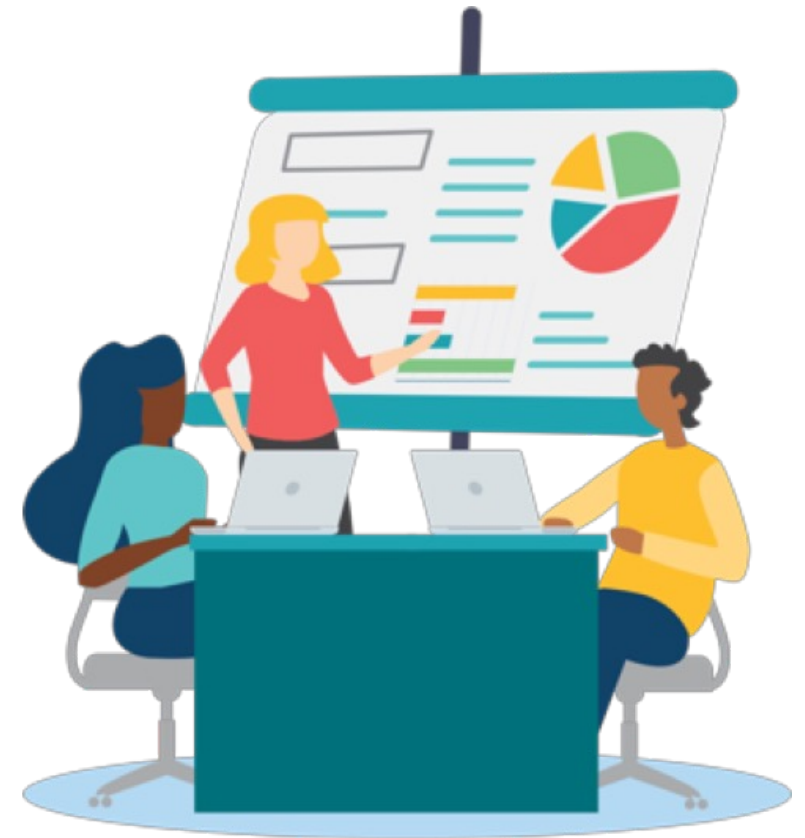
System Administrator Functions

Register New User

Reports

Send Reminder Letters

Send Batch E-mail



# Reports & Reminders: Custom and Standard

- Enterprise Analytics Reporting (EAR)
  - Custom Report Tool
- General Data Export
  - Database Search & Export
- Automated Reminder Reports
  - Authors
  - Reviewers
- Editor Reports
  - Assignment Status Reports
  - New Assignments Report (outstanding Work)
    - Assignments vs Invitations



# Author Reports: Automated Reminders

## Automated Author Revision Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Author Revision reminder e-mails will be sent once every 24 hours to each recipient.

<b>Reminder Type:</b>	<input checked="" type="radio"/> <b>Outstanding Revisions:</b> Send an automated reminder e-mail to Authors who were asked to revise their submission exactly <input type="text" value="10"/> days ago. If Authors have already submitted their revision or have
	<input type="radio"/> <b>Reminder Before Revision Due Date:</b> Send an automated reminder e-mail for revisions that are exactly <input type="text" value="7"/> days before their due date. Reminders will be sent to Authors who have agreed to submit
	<input type="radio"/> <b>Reminder Past Revision Due Date:</b> Send an automated reminder e-mail for revisions that are exactly <input type="text" value="7"/> days past the due date. To send reminders for revisions that are due on the day they submitted their submission, but have not submitted their revision or decline to revise.
<b>First Assigned Editor:</b>	(All Editors) <input type="button" value="v"/>
<b>Editor Who Made First Decision:</b>	(All Editors) <input type="button" value="v"/>
<b>Reminder Name:</b>	<a href="#">Insert Special Character</a> <input type="text"/> <i>Maximum 200 characters</i>
<b>Reminder Letter:</b>	Please Choose an Automated Reminder Letter <input type="button" value="v"/>

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection.

<b>Article Type:</b>	Original Study <input type="button" value="▲"/> <a href="#">Select All</a> Editorial <input type="checkbox"/> Review <input type="checkbox"/> Rapid Communication <input type="button" value="▼"/> <a href="#">Clear All</a>
<b>Section/Category:</b>	Basic Science Section <input type="button" value="▲"/> <a href="#">Select All</a> Clinical Section <input type="checkbox"/> Epidemiology Section <input type="checkbox"/> Demo Section (No one Responsible Yet) <input type="button" value="▼"/> <a href="#">Clear All</a>

# Reviewer Reports: Automated Reminders

## Automated Reviewer Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the automated reviewer reminder e-mails will be sent once every 24 hours to each recipient.

<b>Reminder Type:</b>	<input checked="" type="radio"/> <b>No Response. Send Reminder:</b> Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly <input type="text" value="5"/> days ago. Reminders will be sent to Reviewers who have neither accepted nor declined. <input type="radio"/> <b>Reminder Before Due Date:</b> Send an automated reminder e-mail for reviews that are exactly <input type="text" value="10"/> days before their due date. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review. <input type="radio"/> <b>Reminder Past Due Date:</b> Send an automated reminder e-mail for reviews that are exactly <input type="text" value="7"/> days past the due date. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who have not yet submitted their review. <input type="radio"/> <b>Reminder Outstanding Partially Saved Reviews:</b> Send an automated reminder e-mail for any partially-saved reviews that were saved exactly <input type="text" value="0"/> days ago and have not been submitted fully. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who saved a partially completed review and may have forgotten to submit the fully completed review.
<b>Partially Saved Reviews:</b>	<input checked="" type="radio"/> <b>Include All Reviewers:</b> Include All Reviewers based on the selected Reminder Type. <input type="radio"/> <b>Include Only Reviewers with Partially Saved Reviews:</b> Reminders will be sent only to Reviewers who saved a partially completed review and may have forgotten to submit the fully completed review. <input type="radio"/> <b>Exclude All Reviewers with Partially Saved Reviews:</b> Reminders will not be sent to Reviewers who saved a partially completed review and may have forgotten to submit the fully completed review.
<b>Reviewer Role:</b>	<input type="text" value="(All Reviewers)"/>
<b>Handling Editor:</b>	<input type="text" value="(All Editors)"/>
<b>Reminder Name:</b>	<a href="#">Insert Special Character</a> <input type="text"/> <i>Maximum 200 characters</i>
<b>Reminder Letter:</b>	<input type="text" value="Please Choose an Automated Reminder Letter"/>

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, th

<b>Article Type:</b>	<input type="text" value="Original Study"/> <a href="#">Select All</a> <input type="text" value="Editorial"/> <input type="text" value="Review"/> <input type="text" value="Rapid Communication"/> <a href="#">Clear All</a>
<b>Section/Category:</b>	<input type="text" value="Basic Science Section"/> <a href="#">Select All</a> <input type="text" value="Clinical Section"/> <input type="text" value="Epidemiology Section"/> <input type="text" value="Demo Section (No one Responsible Yet)"/> <a href="#">Clear All</a>

[Save as Automated Reminder](#)

# Editor Reports/Reminders: Assignment Status

## Assignment Status Report - All Editors

**Content:** Submissions for All Editors.

If you send a reminder letter, it will go to the Editors(s), not the Reviewers.

This report was run May 15, 2023 15:42:27.

Page: 1 of 1 (6 total submissions)

Results per page

[Check All](#)

[Clear All](#)

Send Reminder	Action	Manuscript Number	Article Type	Date MS/Revision Submitted	Days Under Review	Reviewer Name & Status	# Additional Reviewers Needed	# Required Reviews	# Completed Reviews	Handling Editor Name	Document Status	Document Status Date	Date Last Editor Reminder Sent	# Editor Reminders Sent
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Invite Reviewers</a> <a href="#">Submit Editor's Decision and Comments</a>	EMUGDEMO-D-23-00004	Rapid Communication	Apr 26, 2023	10	Robert Reviewer (Reviewer) <b>Agreed</b> Amy Analyst (Reviewer) Un-invited Before Agreeing Olivia Opinion (Reviewer) Un-invited Before Agreeing Ricky Reviewer (Reviewer) Un-invited Before Agreeing	1	2	0	mary mary	Under Review	May 05, 2023		0
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Invite Reviewers</a> <a href="#">Submit Editor's Decision and Comments</a>	EMUGDEMO-D-23-00006	Review	Apr 26, 2023	5	Amy Analyst (Reviewer) <b>Invited</b> Claire Commentator (Reviewer) <b>Invited</b> Arnold Appraiser (Reviewer) Un-invited After Agreeing Charles Critic (Reviewer) <b>Alternate</b>	0	2	0	mary mary	Under Review	May 10, 2023		0
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Invite Reviewers</a>	EMUGDEMO-D-23-00002	EMUG Demo	Apr 11, 2023	N/A	No Reviewers Invited or Assigned	2	2	0	Sally Solicitor	With Editor	Apr 11, 2023		0
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Invite Reviewers</a>  <a href="#">View Reviews and Comments</a> <a href="#">Submit Editor's Decision and Comments</a>	EMUGDEMO-D-23-00003	Editorial	Apr 11, 2023	10	Amy Analyst (Reviewer) <b>Review Complete</b> Olivia Opinion (Reviewer) <b>Review Complete</b>	0	2	2	mary mary	Required Reviews Completed	May 05, 2023		0
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Invite Reviewers</a> <a href="#">Submit Editor's Decision and Comments</a>	EMUGDEMO-D-23-00007	EMUG Demo	Apr 11, 2023	5	Arnold Appraiser (Reviewer) <b>Agreed</b> Claire Commentator (Reviewer) <b>Invited</b> Amy Analyst (Reviewer) Un-invited Before Agreeing Charles Critic (Reviewer) <b>Alternate</b>	0	2	0	mary mary	Under Review	May 10, 2023		0

# Editor Reports: New Assignments

- View the status of Outstanding Assignments & Invitations for your Editors
- Send Reminders & Reminder History

Send Reminder	Manuscript Number	Article Type	Article Title	Author Name	Editor Name	Date Editor Invited	Date Editor Assigned	Elapsed Days	Date Last Reminder Sent	# Reminders Sent
<input type="checkbox"/>	EMUGDEMO-D-23-00002 <a href="#">Details</a> ▾ <a href="#">History</a>	EMUG Demo	this is a good EMUG title.	Bobby Jeffrey Hill	<a href="#">Sally Solicitor</a>	N/A	Apr 11, 2023	34		0

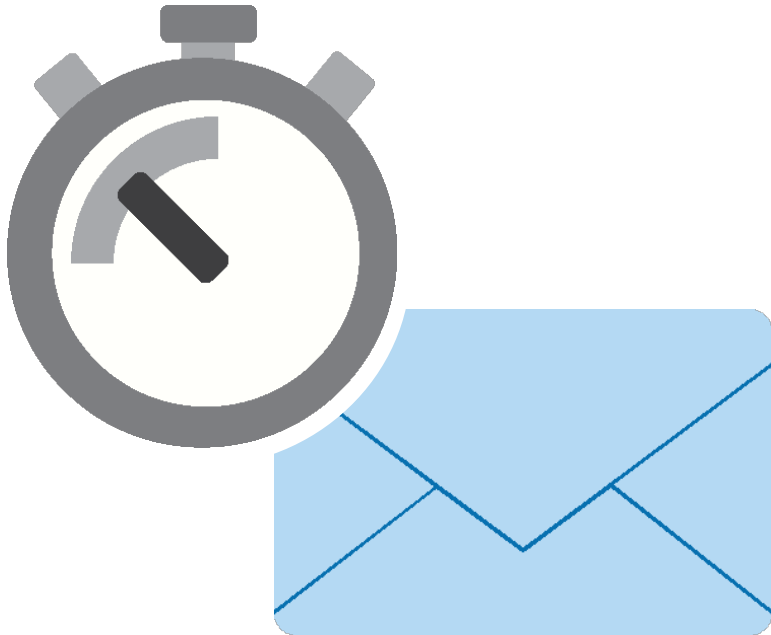
[Check All](#)   [Clear All](#)





# Send Reminders

- Summary of Reminder tools
- View Reports that can send Reminders



## Send Reminder Letters

Click a link below to access the reminder report, from which reminder letters can be sent.

### Author Reminder Reports

- [Co-Author Reminder Report](#)
- [Author Revision Status Report](#)
- [Author Revision Reminder Report](#)
- [Automated Author Revision Reminder Report](#)

### Invited Author Reminder Reports

- [Authors Invited - No Response](#)
- [Author Invitation Status Report](#)

### Editor Reminder Reports

- [Assignment Status Report](#)
- [New Assignments Report](#)
- [Required Reviews Complete Report](#)

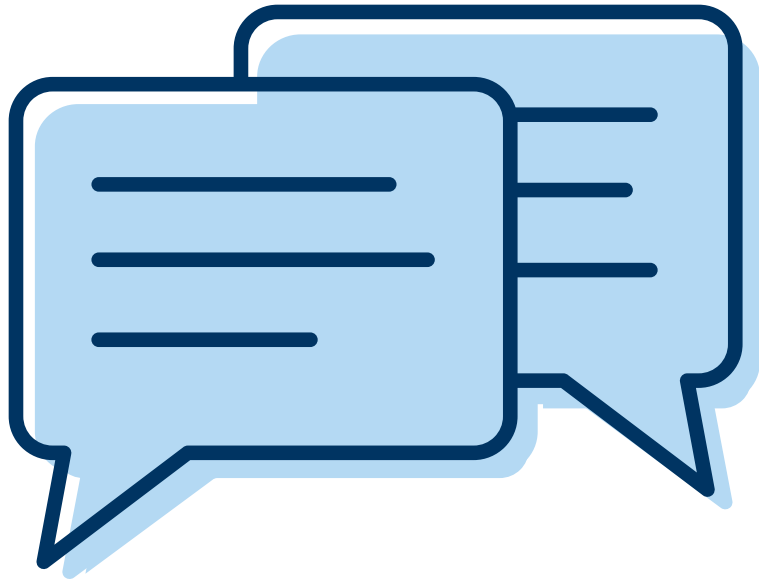
### Reviewer Reminder Reports

- [Reviewer Invited - No Response Report](#)
- [Reviewer Reminder Report](#)
- [Automated Reviewer Reminder Report](#)

# Resources

- EM Help Articles
- Aries Video Library
- EM/PM Release Notes Archive
- EM/PM Beginners Tutorial Documentation
- Aries Blog & Newsletter
- Your Aries Account Coordinator!





# Questions?

# Thank you!

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## Stay Connected

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Account Specialist  
[Mparke@ariessys.com](mailto:Mparke@ariessys.com)

Peter Leary  
Account Coordinator  
[Pleary@ariessys.com](mailto:Pleary@ariessys.com)

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