

# Welcome to EMUG 2016







# Boot Camp

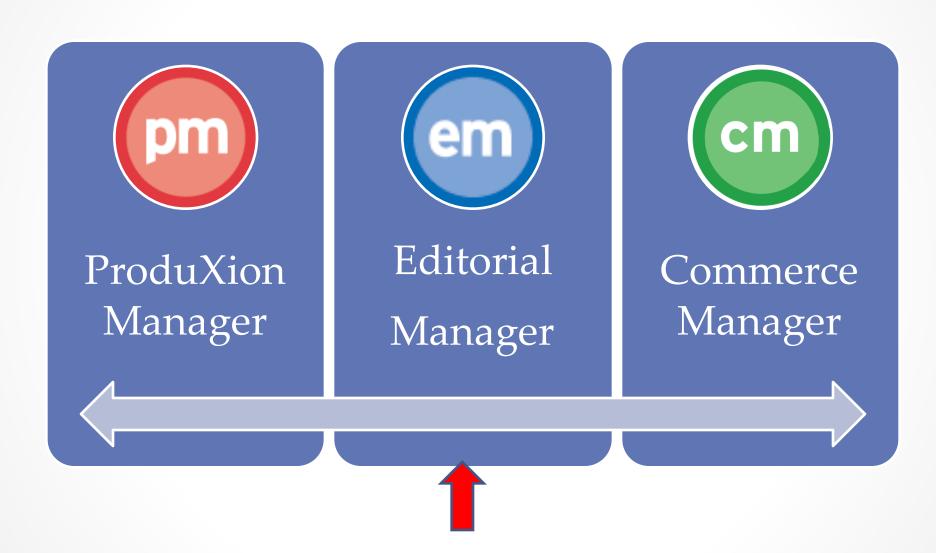
Dianne Gullo, Sr. Account Coordinator

dgullo@ariessys.com



## BootCamp Agenda

- How is EM structured
- How does information get into EM
- User registration
  - Self register
  - Proxy register
- Managing people records
- The author submission process
- Inviting Reviewers
- Completing a review the Reviewer form
- Viewing reviews and comments
- Editor decisions and the decision letter
- Letters
- Reporting



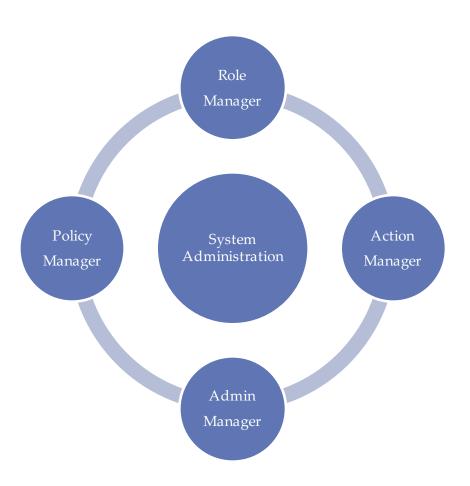
You are here!

## EM is made up of 4 role families



- The author role is the default role. Everyone is an author!
- Users can have 1 role from each family.
- Each role is assigned a set of permissions that determine what a user can see and do.

## System Administration



System Administration is where all configurations and permissions are set.

#### System Administration – Policy Manager

#### 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

Policy Manager is where the majority of your configurations are made.

#### System Administration – Role Manager



Author Role
Reviewer Role
Editor Role
Publisher Rol

Managing Editor
Editor
Editorial Assistant

Remove Edit Copy

Remove Edit Copy

Remove Edit Copy

#### **Edit Role Definition**

Role Name:\*

Managing Editor

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 Submissions in 'New Submissions Requiring Assignment' Folder
  - Perform Technical Check (submission received in 'New Submissions' Folder)
- 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
  - Receive Invitations for Assignments



### System Administration – Action Manager

#### ActionManager

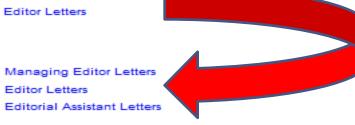
ActionManager allows you to specify who receives letters when a document's status changes, based on all the events that are tracked by Editorial Manager®. All the roles that have been defined in RoleManager are listed below.

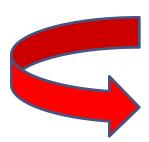
> Document Status Author Letters

Reviewer Letters

EB Reviewer Letters

Managing Editor Letters





#### Reviewer Assigned

Event	Editor Letters
Request Unregistered Reviewer	NONE .
Reviewer Invited	NONE   ▼
Reviewer Assigned (Not Invited)	NONE
Reviewer Agree	Editor Notice Reviewer Agrees to Review
Reviewer Decline	Editor Notice Reviewer Declines to Review

#### System Administration – Admin Manager

## AdminManager Main Menu

Set Live Journal Flag

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

## How does information get into EM?

#### **PEOPLE**

- Import
- Self registration
- Proxy registration

#### **SUBMISSIONS**

- Author submission
  - Unsolicited
  - Invited
- Transferred submissions
  - Between EM sites
  - From non-EM sites into EM
- EM Ingest
  - Author submission via third party Manuscript Service Providers



## Register New User



## Self Registration

This image cannot currently be displayed.	

## Self Registration

#### **Registration Page**

To register to use the Editorial Manager system, please enter the requested information. Required fields have a \* next to the label. Upon successful registration, you will be sent an e-mail with instructions to verify your registration.



You can determine which fields will be required or optional.

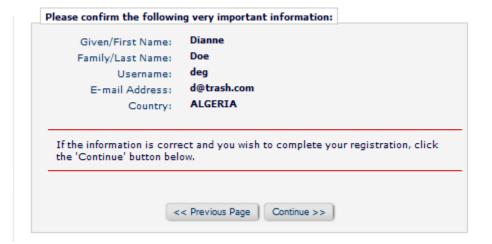
### Institution Name Normalization



Aries has partnered with Ringgold and is using their curated database of institutions. This is another way to keep your data clean!

#### Self Registration

#### **Confirm Registration**



#### **Registration Complete**

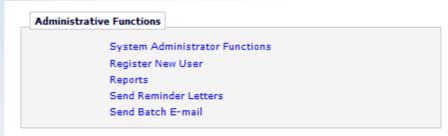
Check your e-mail for a message to verify your registration. This message contains your password, which you need to login. Note that Editorial Manager may have assigned a different Username if the one you selected is already in use.

Thank you!

Go to Login Page

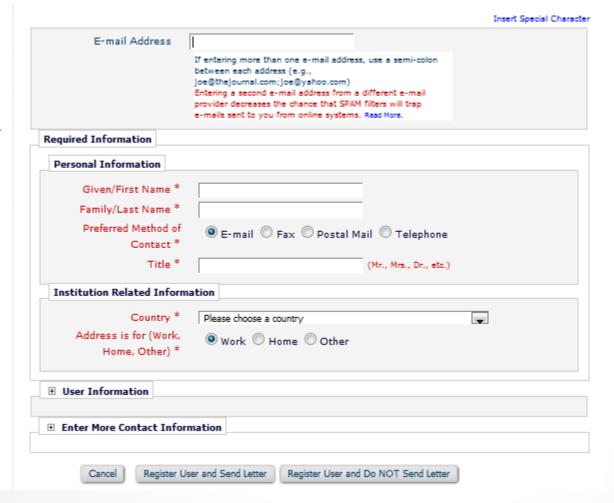
New registrants will be sent an email that contains their new user name and password.

## Proxy Registration



#### Proxy Register New User

You may register a new user and send that new user a custom Welcome letter, or choose not to send a letter. To begin the Proxy Registration process, please enter the following information:



Editors with permission can proxy register users from:

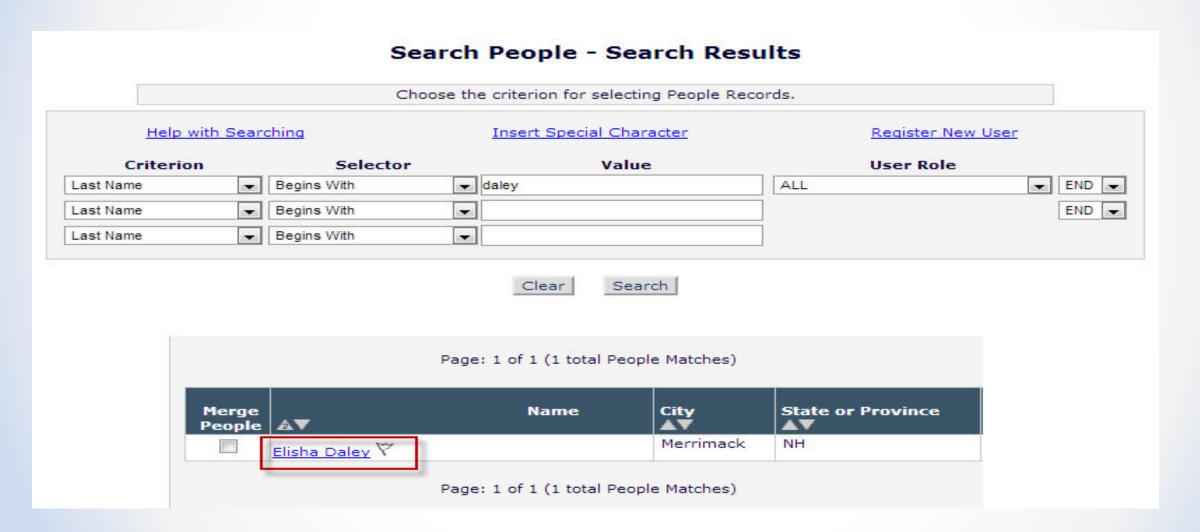
Editor Main Menu Register and invite new reviewer Register and invite new author Search people Results page of search people

# Managing People Records Keeping your data clean!



## User records

Clicking on a users name opens the complete user record.



## Inside a user record

	User Information	Open Special Characte
Search People - Update Information		The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.
o update any information, make ne changes on the form and click ubmit. Required fields have an sterisk next to the label.	User Name * Password *	ME Password Rules
	Re-type Password *	•••••
Proxy-Registered: Nug 06, 2010		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.
Data Verified by User)	Default Login Role:	Author 🐷
ast Modified: Nay 24, 2016	Default Login Menu Available as a Reviewer?	Editorial Menu Ves No (a)
Inactivate this User	Board Member?	Yes No  No
	Forbidden as a Reviewer?	Yes No  No
Send Login Details	Reviewer Role * Publisher Role *	None None
	Editorial Role * Editor Description	Managing Editor
		Activity Details
		Additional People Details

Inside of a user record is where you assign the user a reviewer or editor role.

## Users activity details

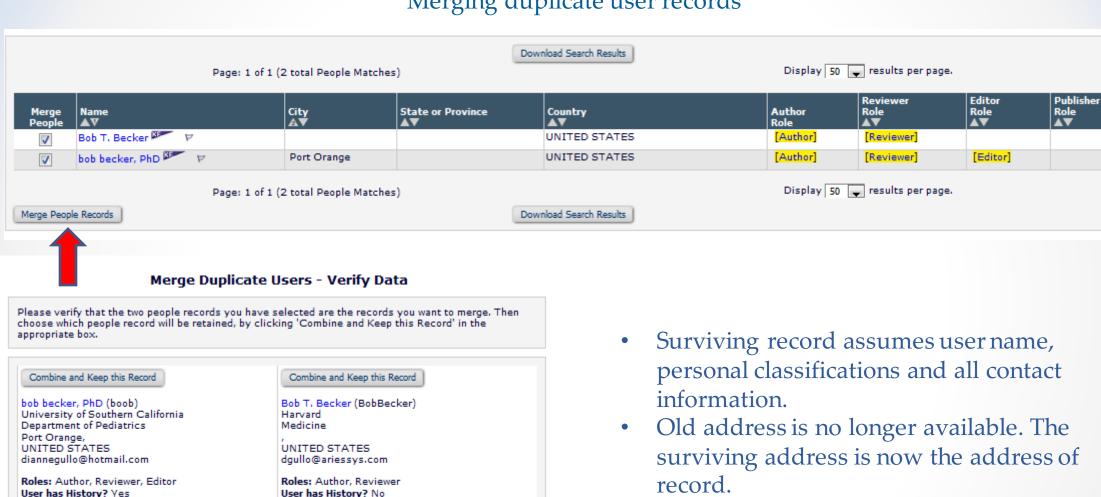
In addition to historical and statistical information a user record also contains current editor assignments, completed reviews and authored submissions.

Current Editor Assignments				
MS Number	Date Editor Assigned	Elapsed Days	Status	Action
demodg16 -46	Apr 12, 2016	31	With Editor	View Submission Details ♥ History
DEOMDG-81-21	Apr 25, 2016	18	With Editor	View Submission Details ► ♥ ▼ ⊗ ₩ History

Completed Review	5								
MS Number	Date Invited	Date Agreed	Date Completed	Days Late	# of Reminders	Recommendation	MS Rating	Review Rating	Action
DEOMDG-81-1	Mar 15, 2012	Mar 15, 2012	Mar 15, 2012	-14	0	Reject	0	0	View Submission Details & W History
DEOMDG-81-10	Sep 12, 2011	Sep 12, 2011	Sep 13, 2011	-13	0	Accept	0	0	View Submission Details ♥ History
DEOMDG-81-13	Mar 15, 2012	Mar 15, 2012	Mar 15, 2012	-14	0	Accept	0	0	View Submission Details ♥ History

Authored Submission	ns						
MS Number	Title	Initial Date Submitted	Status	Status Date	Decision	Final Disposition	Action
demodg15 -41	10/28	Oct 28, 2015	Completed Accept	Oct 28, 2015		Accept	View Submission Details ♥ History
demodg15 -42	Dmitri	Oct 28, 2015	Completed Accept	Oct 28, 2015		Accept	View Submission Details ♥ History

#### Merging duplicate user records



User has Current Assignments? No

User has Shared their Searches? No.

Personal Classifications:

Combine and Keep this Record

People Record Last Update Date: 05/13/2016

This user has no personal classifications

User has Current Assignments? Yes

User has Shared their Searches? No.

Personal Classifications:

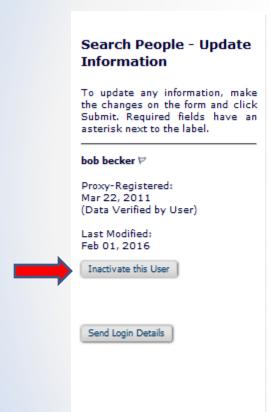
Combine and Keep this Record

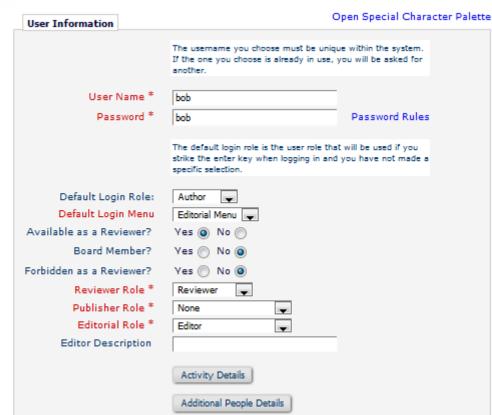
People Record Last Update Date: 02/01/2016

This user has no personal classifications

All history and current assignments are copied to the surviving record.

#### Inactivating user records





- An inactivated user cannot be reinstated.
- The recorded actions and details of the inactivated user do not get removed from manuscript history or details, from Editor or Reviewer performance statistics or from any table or record that uses historical information.



Questions about the Registration Process or Managing People records?



# KEEP CALM AND SUBMIT YOUR PAPER

## Author Main Menu

**Author Main Menu** 

Unavailable Dates

the Author Tutorial.

sure to include:

Alternate Contact Information

For additional help with your

The #1 reason that submissions

\* Corresponding author contact

#### Unsolicited

**Author Main Menu** 

Unavailable Dates

the Author Tutorial.

sure to include:

information

Alternate Contact Information

For additional help with your

submission, please click here for

The #1 reason that submissions

are returned to author is missing

information in the title page. Don't

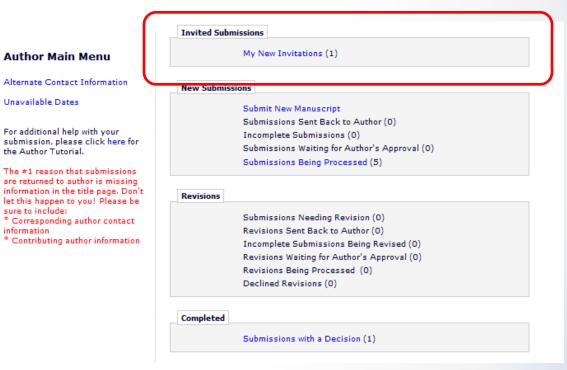
let this happen to you! Please be

\* Corresponding author contact

\* Contributing author information

#### **New Submissions** Submit New Manuscript Submissions Sent Back to Author (0) Incomplete Submissions (0) Submissions Waiting for Author's Approval (1) Submissions Being Processed (5) Revisions Submissions Needing Revision (0) Revisions Sent Back to Author (0) Incomplete Submissions Being Revised (1) Revisions Waiting for Author's Approval (0) Revisions Being Processed (4) Declined Revisions (0) Completed Submissions with a Decision (11)

#### Invited

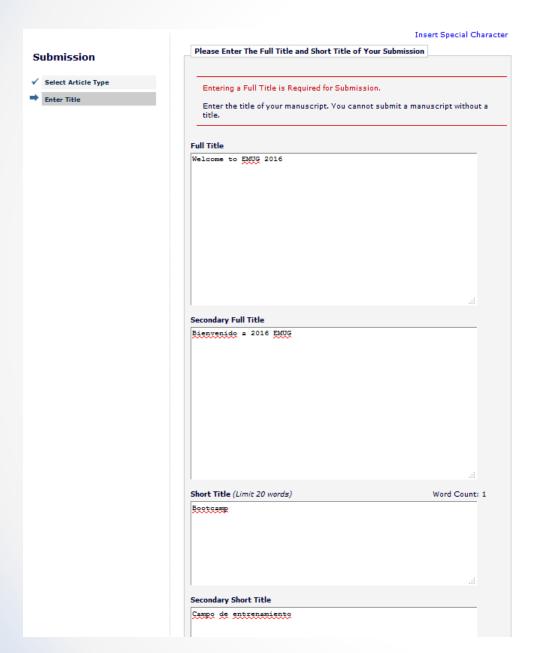


## Select article type



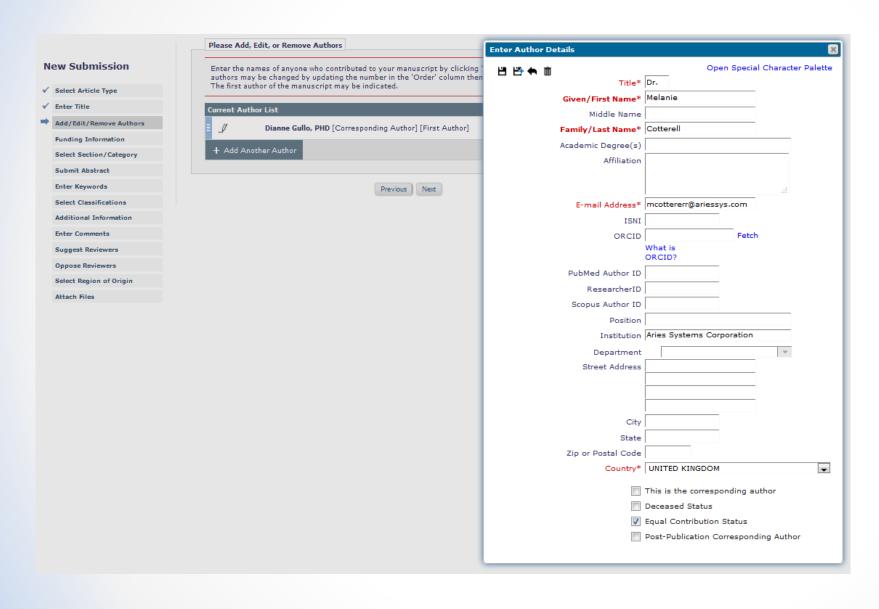
The selection of an article type determines which submission steps will be presented to the author.

## Enter the title of the submission



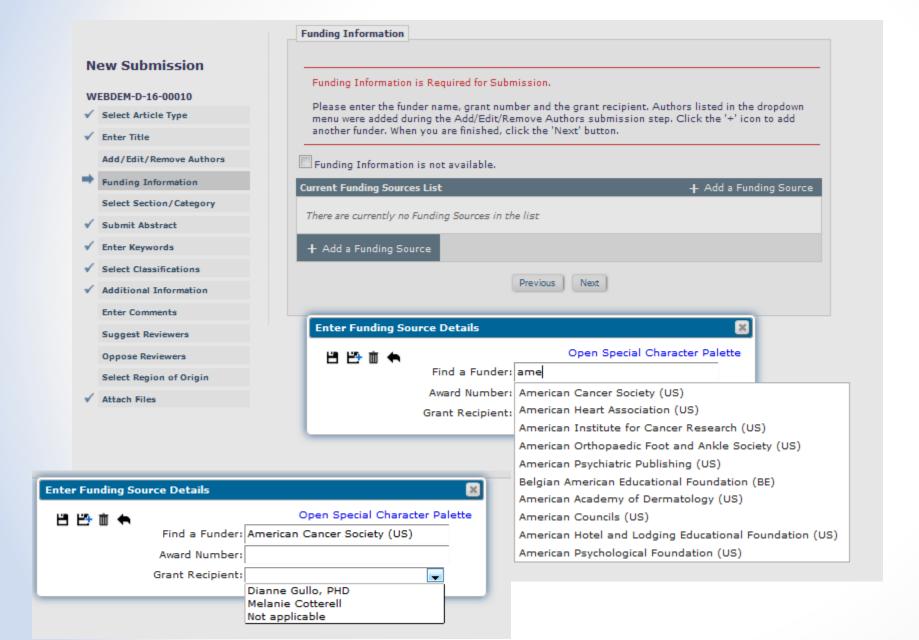
Secondary title fields can be used to enter the submission title in a different language.

## Add/edit/remove author step



You can configure which contributing author fields will be required or optional.

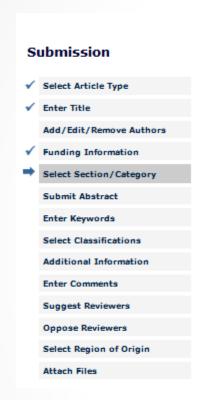
## Funding

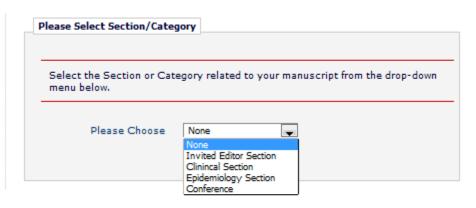


Entering the first few characters of the funding source will populate the pulldown list of funders.

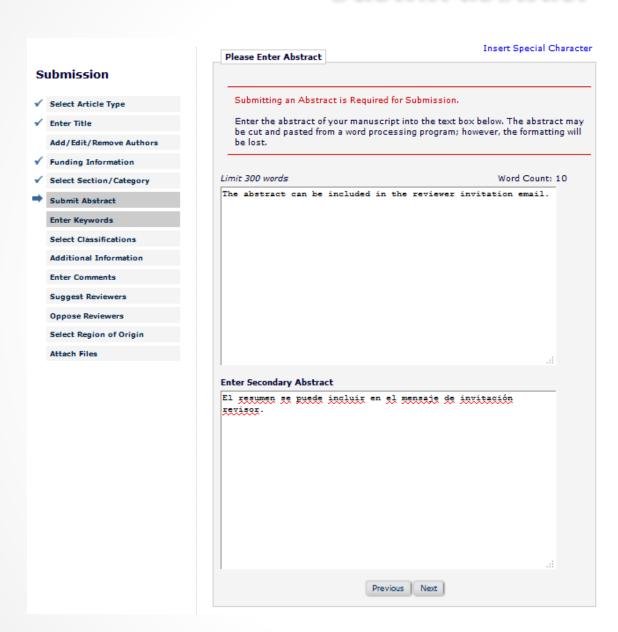
You can also select which author is the grant recipient.

## Sections/categories





## Submit abstract



You limit the number of words or characters of the abstract.

The abstract can be included in the Reviewer invitation letter by using the %ABSTRACT% merge field.

## Author submission process

	Please Enter Keywords	Insert Special Char
bmission	Please Enter Reywords	
ect Article Type	Enter Keywords separated by semicole hormone-related peptide; hypercalcen	ons. e.g., active vitamin D; parathyroid
Enter Title	Each individual keyword may be up to	
Add/Edit/Remove Authors		
Funding Information	Limit 3 Keywords	Keyword Count:2
elect Section/Category	EMUG; boot camp	
Submit Abstract		
er Keywords		
ect Classifications		
ditional Information		
nter Comments		
uggest Reviewers		
Oppose Reviewers		
Select Region of Origin		.4
ttach Files		Nuc
	Previous	s Next

You can allow authors to manually enter keywords associated with the content area of their submission.

## Author submission process

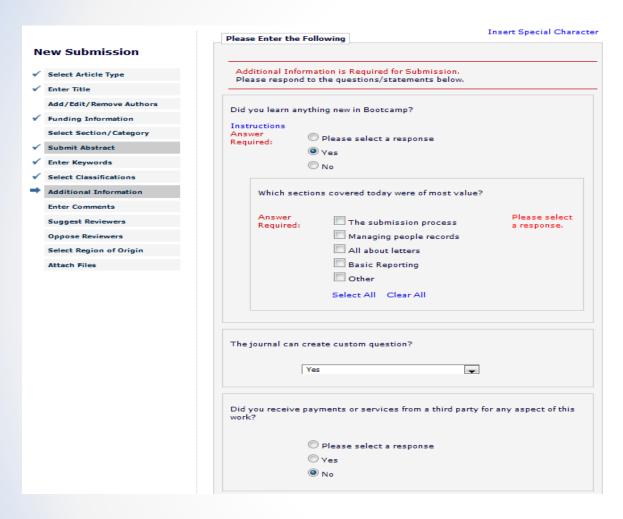
#### Select Submission Classifications Please identify your manuscript's areas of interest and specialization by selecting one or more classifications from the list below. Click 'Submit' at the bottom of the page when you are done. To save changes you must click "Submit" before you leave this window. (less...) Search: Search Clear [Matching terms display in red text] Selected Classifications: Select up to 2 Classification(s) Second Major Term 20,600: New Classification .500: Minor Term under Second 20: Second Major Term New Classification 40: Training and Education Third Major Term 40: Training and Education Add-> <-Remove

Cancel

Expand All Collapse All

If you require the selection of classifications during registration and also require the author to select classifications during submission process EM can provide a list of potential reviewers by matching Reviewers areas of expertise with the content area of a manuscript.

## Additional Information



Questionnaires are article type specific.

Follow-on questions can be used to collect additional information.

Questions can be required or optional.

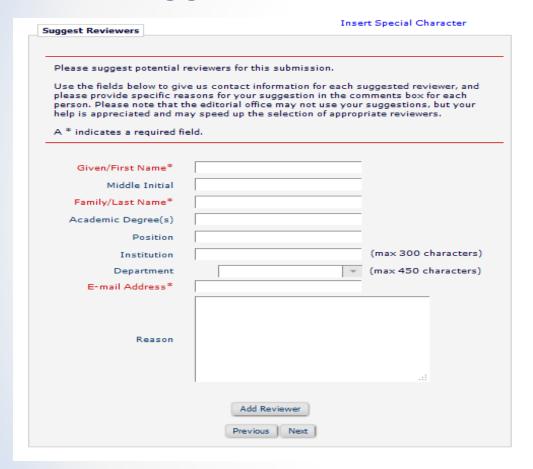
## Comment Box





# Suggest / Oppose Reviewers

# Suggest reviewers

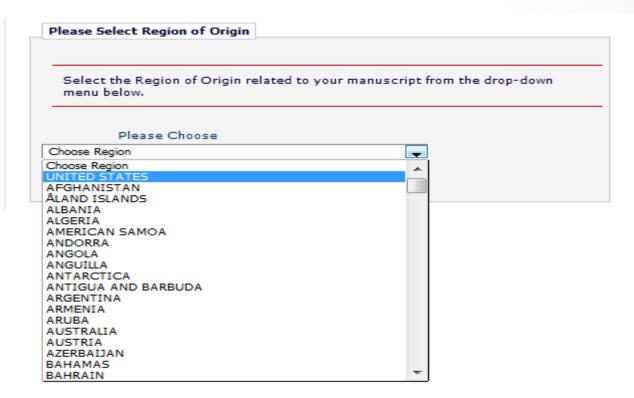


# Oppose reviewers

pose Reviewers	Ins	ert Special Character
Fill in as much contact info ecords, and please provid submission in their comme	o you would prefer not to review th ormation as possible to allow us to le specific reasons why each persi ents box. Please note that we may will try to accommodate author's t	identify the person in our on should not review your need to use a reviewer
· marcates a required in		
Given/First Name*		-
Middle Initial		_
Family/Last Name*		
Academic Degree(s)		
Position		
Institution		(max 300 characters)
Department	-	(max 450 characters)
E-mail*		
Reason*		ai
	Add Reviewer  Previous Next	

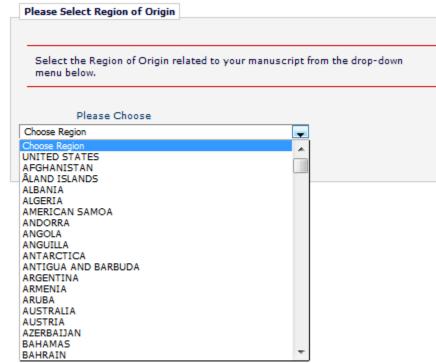
You can determine which fields are required or optional for both the suggest and oppose reviewers submission step.



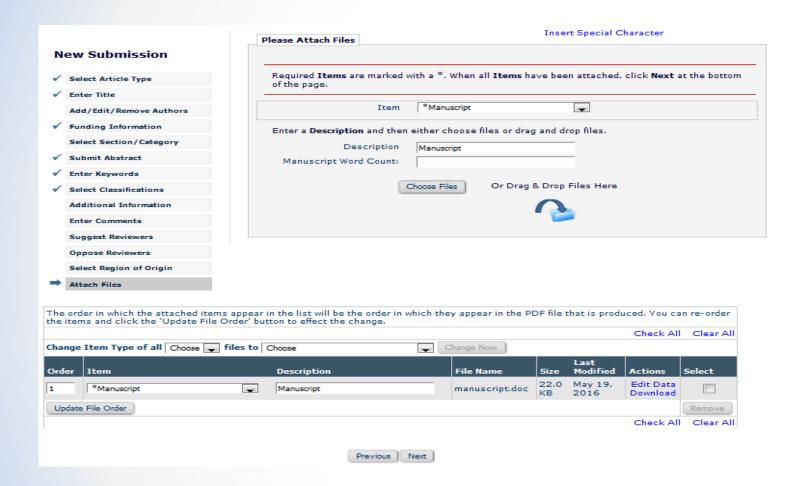


# Select region of origin





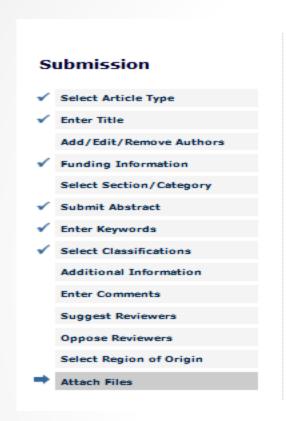
This is the ISO (International Organization for Standardization) official list of countries.

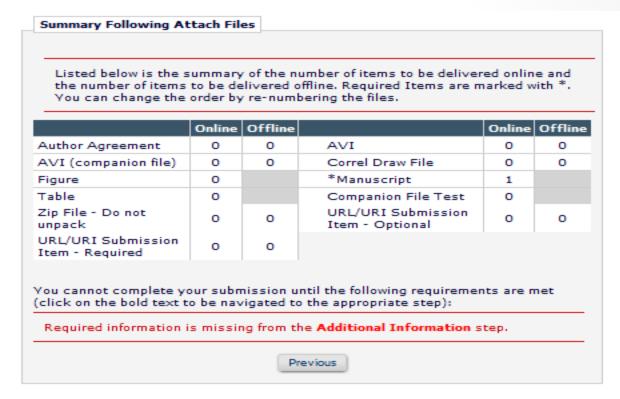


Authors can upload a variety of file types: for example

- Zip file
- URL / URI to external resource
- Supplemental files
  - Audio / video / wave

Required and optional submission items are configured in Policy Manager.





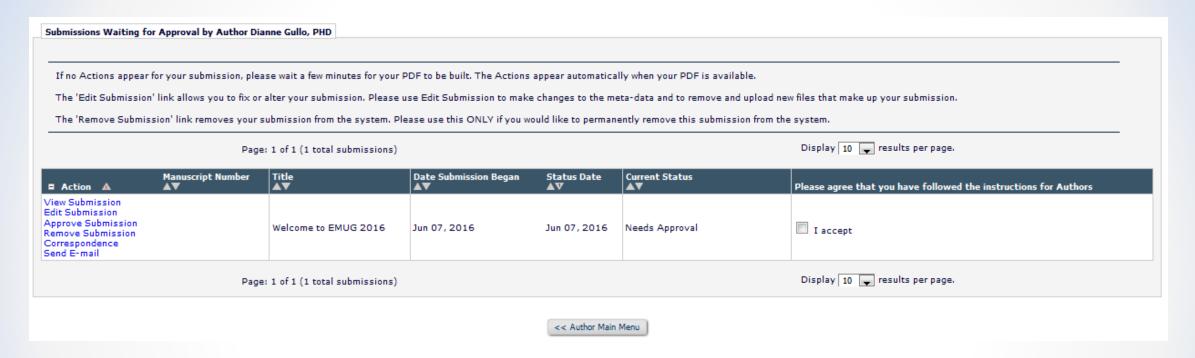
EM verifies that all required submission steps and submission items have been included before allowing the author to complete their submission.

EM builds two pdf's: an author/editor and a reviewer pdf.

# Publication Charges You may choose to submit this manuscript for Open Access publication. Please click the 'View Publication Charges' button to see the estimated Article Processing Charge. If you would like to submit this manuscript for Open Access publication, please select the 'Yes' radio button below. If you do not wish to submit this manuscript for Open Access publication, please select the 'No' radio button below. When you have made your selection, please click the 'Proceed' button. View Publication Charges Would you like to submit this manuscript for Open Access publication? Yes No Cancel Proceed

- Aries has partnered with RightsLink for the collection of open access article processing charges (APC).
- APC's can be configured by article type.
- APC's can be required or optional

# I accept checkbox



The author must view their submission before it can be approved

Author's Decision	Thank you for approving "EMUG 2016 Boot camp submission".
	Main Menu



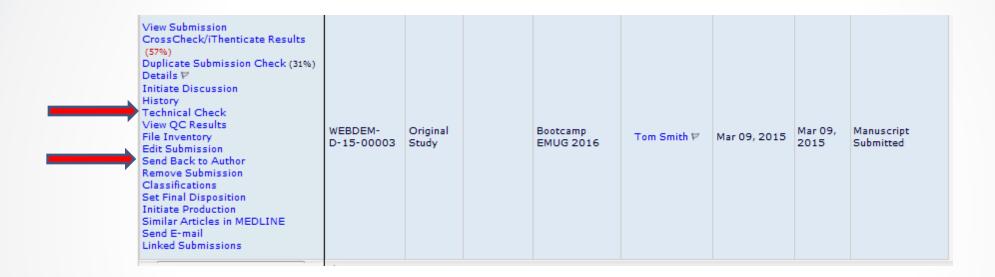
Questions about the author submission process or corresponding configurations?

# What happens once the author submits the paper to the publication?



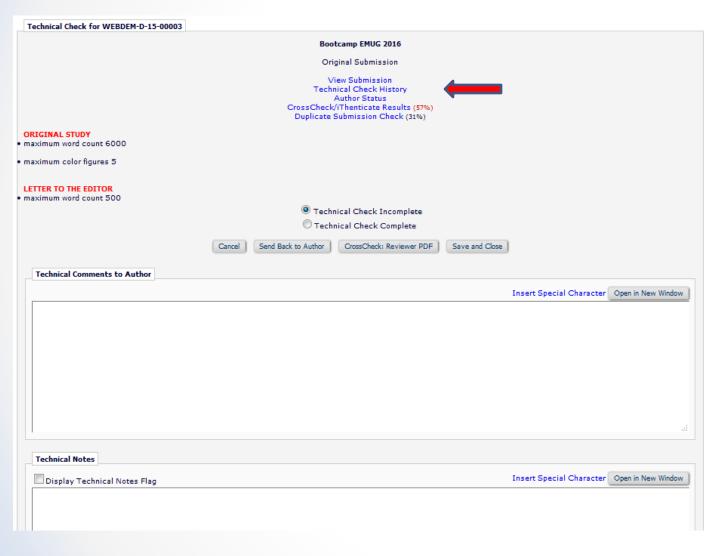
To peer review or not to peer review that is the question!

#### Technical check and Send back to author



Return to author sends the submission back to the author with a letter, however the number of times and reasons for the return are not tracked.

# Technical check



- Technical check is an opportunity to triage a submission and return it to the author prior to beginning the peer review process.
- Technical check tracks the number of times and reasons a submissions has been sent back to the author.
- %TECHNICAL\_COMMENTS\_TO\_AUTHOR% merge field can be used in the technical check fail letter.
- Once a submission passes technical check it can be assigned to an Editor.

# Assign editor

= Action	Manuscript \$ Number	Article \$	Section/ Category	Article 💠 Title	Author \$	Initial Date 🕏 Submitted	Status 🕏 Date	Current \$ Status	
View Submission CrossCheck/iThenticate Res (57%) Duplicate Submission Check (31%) Details ♥ Initiate Discussion History View QC Results Technical Information File Inventory Edit Submission Send Back to Author Remove Submission Classifications Assign Editor Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions	WEBDEM- D-15-00003	Original Study		Bootcamp EMUG 2016	Tom Smith ₽	Mar 09, 2015	Mar 09, 2015	Manuscript Submitted	

# Assign editor

#### **Assign Editor**

Manuscript Number: WEBDEM-D-15-00003

Title: Bootcamp EMUG 2016

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.



Send Custom Letters

Send Default Letters

 Blinding an Editor from a submission prevents that Editor from having any access to the submission.



Questions about Technical check or Editor assignment?

# QPEER REVIEW



# **Inviting Reviewers**

There are a number of ways to search for potential Reviewers:

- Classification matches
- Personal classifications
- Reviewers suggested by the author
- Name
- Suggest Reviewers
- Register and select a new Reviewer
- Request unregistered Reviewer
- Search from the entire database for users without reviewer roles
- Search using Reviewer Discovery

# Searching for Reviewers by classification matches

# The Reviewer selection summary page



# Searching for Reviewers by classification matches

#### Search Reviewer All Reviewers - Manuscript Number WEBDEM-D-15-00012 by Classification Allan Author Global Health Initiatives Article

Search N	rch Type  My Publicatio	n Sea	rch by Classification Matches	from All Reviewers	Go
	-		ProQuest Community of Sch	olars	
			ssification term below indicates ng the Classification term(s) you		
			Reviewers.		
Page: 1 of	1 (3 total C	lassificati	on matches)	Display 10 📦 results p	er page
			Classification	Number of Reviewers	
	<b>▽</b>	20	Second Major Term	9	
	<b>V</b>	30	Third Major Term	6	
	<b>√</b>	40	Training and Education	2	
				Display 10 results p	er page
Page: 1 of	1 (3 total C	lassificati	on matches)	Display 10 Tesuits p	
Page: 1 of	1 (3 total C	lassificati	on matches)	Display 10 💂 lesuits p	

EM matches the submission classifications with Reviewer areas of expertise.

EM tells you how many Reviewers in your database match the submission classifications.

Register and Select New Reviewer Request Unregistered Reviewer My Suggest Reviewer Preferences Editor Main Menu

# Searching for Reviewers by classification matches

elect As nv. Asn.	Alt. Pr	Reviewer op. Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics	
		Oliver Bennett	No	2 Class match with MS  * 20: Second Major Term  * 40: Training and Education	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:	1 5 3 0 May 20, 2016 May 20, 2016 - 0 85 0.0	Date Last Invited: Outstanding Invitations: Agreed: Declined: Un-invited Before Agreeing: Terminated: Total Invitations:	Apr 15, 2015 0 9 0 0 0 9
v. Asn.	Alt. Pro	p. Nichole Ferree, etc. ヤ (Test Reviewer) CS	No	2 Class match with MS * 20: Second Major Term * 30: Third Major Term	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:	2 2 0 0 Jun 01, 2012 Jun 01, 2012 - 0 100	Date Last Invited: Outstanding Invitations: Agreed: Declined: Un-invited Before Agreeing: Terminated: Total Invitations:	- 0 4 0 3 0 7

Dersonal Classifications	(* indicates match with document)
reisonal classifications	muicates materi with document)

	Classification	Experience Ranking
*	20: Second Major Term	High
	20.600: New Classification	Medium
*	40: Training and Education	Low

Clicking on a Reviewers name provides additional Reviewer information including their classification ranking.

# Completing a review

Once a Reviewer accepts the invitation to review or is assigned to review, the submission will move to the Reviewer's pending assignment folder where he can submit the review.



# Completing a review

## The review form can contain:

- Instructions either embedded on the form or in a pop up window
- Manuscript rating questions
  - Scale of 1-3 / 1-5 / 1-10
- Custom review questions
- Confidential comment to author box
- Comment to editor box
- Ability to upload reviewer attachments

The review form is configured in Policy Manager



Questions about inviting reviewers, completing a review, or the corresponding configurations?

# **Editor Decisions**



# Viewing completed reviews

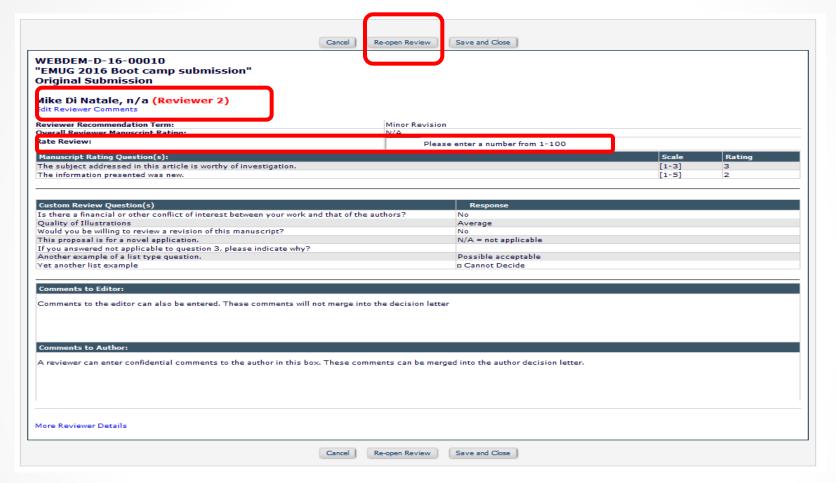


To view completed reviews the Editor can click on the View Reviews and Comments link in their list of available action steps.

This information is also available on the top of the Editor's decision form.

View Reviews and Comment WEBDEM-D-15-00012 "Global Health Initiatives Art Original Submission	-	Close		
Click the recommendation term to view t	he comments for the su	bmission.		
	Attachments (1)	View Manuscript Rating Card	View Review Question Responses	
			Original Submission	
Oliver Bennett (Reviewer 1)			Minor Revision	
Chief Editor, PHD (Editor-in-Chief)				
Author Decision Letter				
Allan Author, MD (Author)				
		Close		

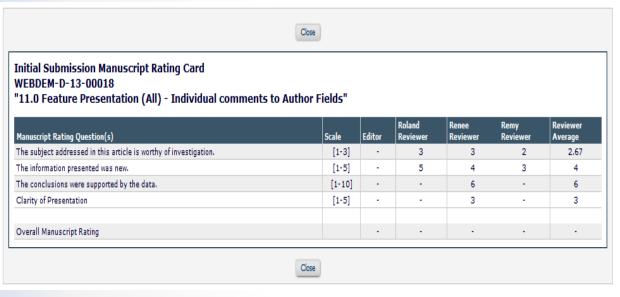
The Editor has access to any uploaded reviewer attachments. Clicking on the reviewer's recommendation will open the review form.



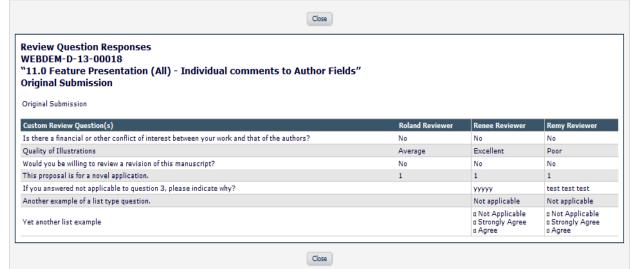
#### Inside the review form an Editor can:

- Reopen a review returns the paper to the reviewer
- Rate the reviewer The rating is averaged into the overall reviewer rating
- View and Edit the reviewer comments (with appropriate permission)
- View the rating and custom question responses

## Manuscript rating card



# View Review Questions Responses

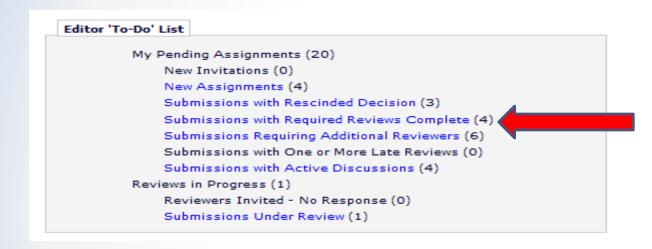


Custom questions and responses can be merged into the decision letter.

Action   l	Uploaded By	Description	File Name	Size	Upload Date	Allow Author Access	Allow Reviewer Access
Original Submission							
Download Download Sanitized Copy Remove Upload Revised File	Oliver Bennett (Reviewer 1)		Reviewer Comments.doc	48.0 KB	May 20, 2016	<b>V</b>	

- Reviewer attachments can be made available to the author or other reviewers.
- Attachments can be sanitized author identifying information is removed from the file properties

# **Editor Decisions**



View Submission Details P Initiate Discussion History File Inventory Edit Submission Classifications Unassign Editor Assign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production Similar Articles in MEDLINE Submit Editor's Decision and Comments Send E-mail Linked Submissions W

An Editor is notified when the required number of reviews have been completed.

These submissions move to the Editor's "Submission with Required Reviews Complete" folder.

Click on the submit Editor's Decision and Comments link to open the Editor decision form.

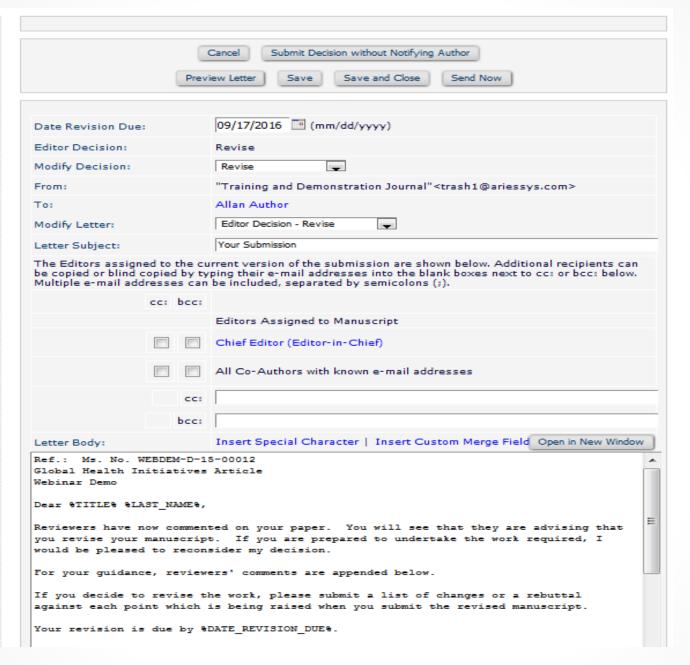
#### **Notify Author**

Manuscript Number: WEBDEM-D-15-00012

Title: Global Health Initiatives Article

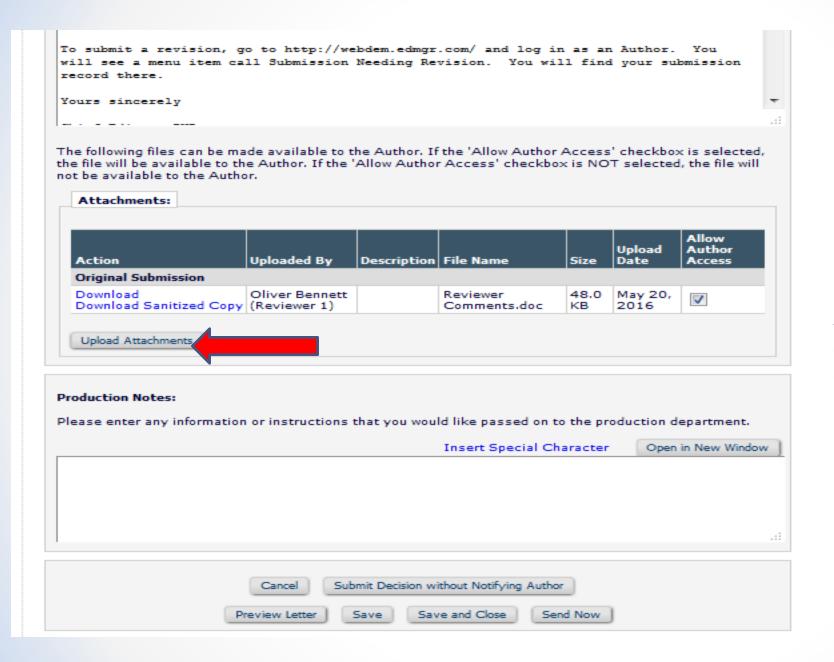
To finalize your decision and notify the author, use the 'Send Now' button.

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.



If the Editor has the Notify Author permission the letter that corresponds to the Editor decision is automatically presented.

The Editor can select a different decision letter if multiple letters are configured for a decision term.



An Editor can upload attachments directly on the decision letter.

# **Editor Decisions**



Reviewers can be notified when an Editor makes a decision.

# Author view of attachments



Date: May 25, 2016

To: "Allan Author" katehrgn@gmail.com

From: "Training and Demonstration Journal" trash1@ariessys.com

Subject: Your Submission

Attachment(s): Reviewer Comments.doc

Revision\_Due.ics

Ref.: Ms. No. WEBDEM-D-15-00012 Global Health Initiatives Article

Webinar Demo

Dear Author,



Attachments to the decision letter can be viewed by the author from either an attachment to the email (if configured) or by using the view attachments link in their action steps.



Questions about viewing reviews, Editor decisions or the corresponding configurations?