

EEMUG 2020



#EEMUG2020





Introduction to EAR



Elysia Williams

Account Manager

ewilliams@ariessys.com

#EEMUG2020



Introduction to EAR

- Non-EAR Reporting in EM
- RoleManager Permissions
- EAR Main Menu
- Running Standard Reports
- Icons and Tool Bars
- Editing and Creating Reports
- Data Sources
- Fields
- Summary Tab
- Charts and Gauges
- Sharing Reports
- Styling
- Filters
- Email and Scheduling Capabilities





“[Wald, Mädchen, Ziege](#)” by [Heinrich Campendonk](#) is licensed under [CC BY-SA 4.0](#)

Non-EAR Reporting in EM

*Is EAR always the best
option for you?*



Non-EAR Reporting in EM

em Editorial Manager™

Go to: -- Search Page --

Role: -- Search Page --

- Submissions
- Proposals
- People
- Quick Access --
- System Administrator Functions

Search submissions selection criteria

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

Search Definition: Choose Saved Search

Remove Search Definition Edit Selected Search Definition Share Selected Search Definition Run Selected Search Definition

Help with Searching

Insert Special Character

Value Options

Advanced Criteria

(	Criterion	Is/Is not	Selector	Value)
	Classification Description	is	Contains	Art History	
				Greater Than Or Equal	01/01/2011

Search Submissions - Search Results

Classification Description is containing 'Art History'

Page: 1 of 2 (14 total submissions)

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	Reviewers
View Submission Details Initiate Discussion History Technical Information File Inventory Edit Submission Solicit Commentary Classifications View Reviews and Comments Publish Information Transmittal Form Send E-mail Linked Submissions...	DEMOEW-2019-000144R1		Chelsea Critic	Joseph Beuys and the Tetrahedral Block of Fat	Letter to the Editor		Joseph Beuys;Munich;	120: German Art His 120.10: Joseph Beuys	Completed Accept	15 Nov 2019	01 Nov 2019	Rachel Fenn Notburga Hamilton Marlene Jacobs Lisa Literatur Monika Modernist, Ph.D. Rachel Fenn Lisa Literatur Monika Modernist, Ph.D. Rachel Fenn Notburga Hamilton
View Submission Details Initiate Discussion History Technical Information	DEMOEW-2019-000145		Charlotte Ritter	Zeige deine Wunde and the public debate over the value of contemporary	Editorial			120: German Art His 120.10: Joseph Beuys	Completed Accept	15 Nov 2019	13 Nov 2019	Rachel Fenn Marlene Jacobs



Non-EAR Reporting in EM



	A	C	D	E	F	G	H
1	Manuscript Number	Discriminator Name	Article Title	Article Type	Short Title	Keywords	Classifications
2	DEMOEW-2019-000144R1	Deborah C. M. Critic (UNITED STATES)	Joseph Beuys and the Tetrahedral Block of Fat	Letter to the Editor		Joseph Beuys; Munich	120: German Art History; 120.10: Joseph Beuys
3	DEMOEW-2019-000145	Charlotte Ritter (AUSTRIA)	Zeige deine Wunde and the public debate over the value of contemporary art	Editorial			120: German Art History; 120.10: Joseph Beuys
4	DEMOEW-2019-000146	Charlotte Ritter (AUSTRIA)	Neue Sachlichkeit and the Modern Man	Letter to the Editor		Schad, New Objectivity, Neue Sachlichkeit	120: German Art History; 120.20: Neue Sachlichkeit
5	DEMOEW-2019-000147	Charlotte Ritter (AUSTRIA)	Der Blaue Reiter and Renewal in German Art	Annual Meeting Abstract			120: German Art History; 120.30: Der Blaue Reiter
6	DEMOEW-2019-000148R1	Pam Beesley (UNITED STATES)	soul/feeling in Joseph Beuys	Review		Joseph Beuys, philosophy	120: German Art History; 120.10: Joseph Beuys
7	DEMOEW-2019-000149	Pam Beesley (UNITED STATES)	The Spiritual in Art	Letter to the Editor			120: German Art History; 120.30: Der Blaue Reiter
8	DEMOEW-2019-000150	Pam Beesley (UNITED STATES)	A German's take on 9/11: Gerhard Richter's tribute to the terror attacks	Editorial			120: German Art History; 120.40: Contemporary German Artists
9	DEMOEW-2019-000151	Archibald Auteur (UNITED KINGDOM)	Beuys and the Plastic Arts	Review			120: German Art History; 120.10: Joseph Beuys
10	DEMOEW-2019-000152	Archibald Auteur (UNITED KINGDOM)	Neue Sachlichkeit and the Modern Man	Editorial			120: German Art History; 120.20: Neue Sachlichkeit
11	DEMOEW-2019-000153	Kathrin Schäfer (AUSTRIA)	Rudolf Schlichter's Portrait of Bertolt Brecht	Review			120: German Art History; 120.20: Neue Sachlichkeit
12	DEMOEW-2019-000154R1	Dorea Ruggles (UNITED STATES)	Gerhard Richter and Science: the Silicate Series	Editorial			120: German Art History; 120.40: Contemporary German Artists
13	DEMOEW-2019-000155	Dorea Ruggles (UNITED STATES)	The Animals of Franz Marc	Editorial			120: German Art History; 120.30: Der Blaue Reiter
14	DEMOEW-2019-000156	Warren Frederick (AUSTRALIA)	The Theme of Wurst in Sigmar Polke's Art	Letter to the Editor			120: German Art History; 120.40: Contemporary German Artists
15	DEMOEW-2019-000157	Warren Frederick (AUSTRALIA)	The Irony of Sigmar Polke	Editorial			120: German Art History; 120.40: Contemporary German Artists



Non-EAR Reporting in EM



Search submissions selection criteria

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

Search Definition: Choose Saved Search

Choose Saved Search
Art History Submissions

Remove Search Definition

Edit Selected Search Definition

Share Selected Search Definition

Run Selected Search Definition

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
Classification Description is containing 'Art History'	Art History Submissions
	<input checked="" type="checkbox"/> Show this Search in Main Menus

Cancel

Submit

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

Managing Editor Main Menu

Quick Searches:

[Art History Submissions](#)



Non-EAR Reporting in EM

Search Definition:

Remove Search Definition

Edit Selected Search Definition

Share Selected Search Definition

Run Selected Search Definition

Editorial

Proposal Menu

Save Search Criteria

Select the Roles that will be able to use this Search Definition. Users with access to 'Search Submissions' links will be able to select the definitions there; users without access to these links will be able to select the definitions there; users without access to these links will be able to select the definitions there; users without access to these links will be able to select the definitions there.

Cancel

Proceed

Include	Role:
<input type="checkbox"/>	Managing Editor
<input checked="" type="checkbox"/>	Editor-in-Chief
<input type="checkbox"/>	Deputy Editor

Cancel

Proceed

Editor-in-Chief Main Menu

Quick Searches:

[Art History Submissions](#)

Submissions With:

0 Reviews Complete	1 Reviews Complete	2 Reviews Complete	3 Reviews Complete	4 Reviews Complete
0	0	0	0	0

Search

[Search Submissions](#) | [Search People](#)

Editor 'To-Do' List

- My Pending Assignments (0)
- New Invitations (0)
- New Assignments (0)
- Submissions with Required Reviews Complete (0)
- Submissions Requiring Additional Reviewers (0)
- Submissions with One or More Late Reviews (0)
- Reviews in Progress (0)





"[Impression III \(Konzert\)](#)" by [Wassily Kandinsky](#) is licensed under [CC BY-SA 4.0](#)

RoleManager Permissions

*RoleManager > Editor Role >
Administrative and Reporting
Functions*



"[Berg](#)" by [Wassily Kandinsky](#) is licensed under [CC BY-SA 4.0](#)



RoleManager Permissions

Administrative and Reporting Functions

System Administration Functions

Unrestricted Access

Restricted Access

 Produce Reports

 Schedule Reports

Run Cross-Publication Custom Reports



EAR Main Menu

*Editorial Main Menu > Reports > Enterprise Analytics
Reporting*



“[Fahrrate](#)” by [Kurt Schwitters](#) is licensed under [CC BY-SA 4.0](#)



EAR Main Menu

Reports

All Submissions with Final Disposition:

Accept (21), Reject (7), Withdrawn (13), Transfer (1)
Completed Conference Submissions (1)
Withdrawn Conference Submissions (0)

Linked Submission Groups

Active Linked Submission Groups (0)
Inactive Linked Submission Groups (0)

Administrative Functions

System Administrator Functions
Register New User
Reports
Send Reminder Letters
Send Batch E-mail

Report Tools

Enterprise Analytics Reporting
General Data Export
Custom Report
Database Help
Search/Manage Conference Submissions

Status Reports

Accepted Manuscripts Without a Publication Date



EAR Main Menu

Enterprise Analytics Reporting

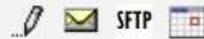
[Create Report](#)

[Get more help](#) about database tables and their contents

[Get more help](#) about Views and their contents

Standard Reports

Editorial Reports



[Accept and Reject Decisions by Editor in selected timeframe](#)

[Accept and Reject Decisions in selected timeframe](#)

[Average Days to Decision by Editor](#)

[Completed Reviews Detail Report](#)

[Editor Submission Counts - All editors by Role](#)

[Editor Submission Counts - Editors at End of Chain](#)

[People and Classifications](#)

[People and Institutions](#)

- Standard Editorial, Production, 3rd Party reports already set up.
- “Create Report” link for designing reports
- Edit/Design ability for modifying existing reports, both custom and standard



EAR Main Menu

- Saving reports creates new sections called My Reports/Shared Reports, depending on if they are shared with other users.
- My Reports section specific to logged in User.
- Can create own folder and report names, when saving reports.
- Clicking on the folder icons expands/contracts the list of reports

Enterprise Analytics Reporting

[Create Report](#)

[Get more help](#) about database tables and their contents

[Get more help](#) about Views and their contents

The screenshot displays the EAR Main Menu interface, which is divided into three main sections. Each section has a tab at the top and a list of reports below. Red arrows point to the folder icons in each section.

- My Reports**: This section contains a folder icon labeled "My Reports" and a report titled "Test Report".
- Shared Reports**: This section contains a folder icon labeled "Editorial Reports" and three reports: "CHMT Monthly Report for Testing", "ORDE Test Report", and "People and Classifications PLUS Title".
- Standard Reports**: This section contains two folder icons: "Editorial Reports" and "Third Party Exports". The "Third Party Exports" folder contains a report titled "CRedit Usage by Manuscript".





[“Anthropologischer Unterricht”](#) by [Gabriel von Max](#) is licensed under [CC BY-SA 4.0](#)

Running Standard Reports

Just click!



Running Standard Reports

- Click on report name to run it.
- Hover over report name to display the design (Pencil) icon.
- Can edit report and resave under your own name



Standard Reports

Editorial Reports

  SFTP  [Accept and Reject Decisions by Editor in selected timeframe](#)

Accept and Reject Decisions in selected timeframe

Average Days to Decision by Editor

Completed Reviews Detail Report

Editor Submission Counts - All editors by Role

Editor Submission Counts - Editors at End of Chain

People and Classifications

People and Institutions

People Detail Sheet Subreport

People List Subreport

Reviewer Thank-You List



Running Standard Reports



Accept and Reject Decisions by Editor in selected timeframe

Alfred, Editor

Final Decision Term	Number of MSS	% of Total
Accept	3	75.0%
Reject	1	25.0%
	4	100%

Archibald, Auteur

Final Decision Term	Number of MSS	% of Total
Accept	1	50.0%
Reject	1	50.0%
	2	100%

Georg, von Humboldt

Final Decision Term	Number of MSS	% of Total
Accept	3	75.0%
Reject	1	25.0%
	4	100%

Kathrin, Schäfer

Final Decision Term	Number of MSS	% of Total
Accept	4	80.0%
Reject	1	20.0%
	5	100%



Icons and Toolbars

What do those Icons mean?

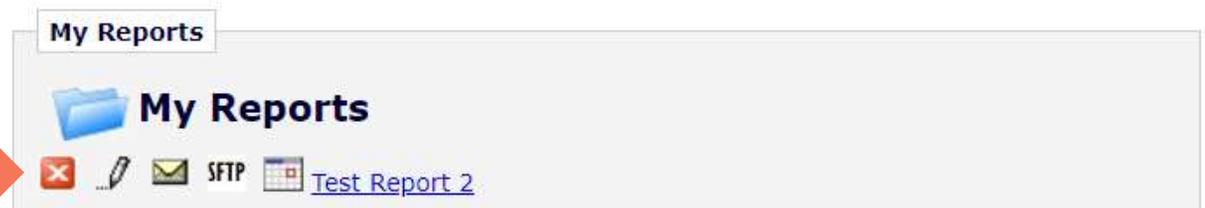


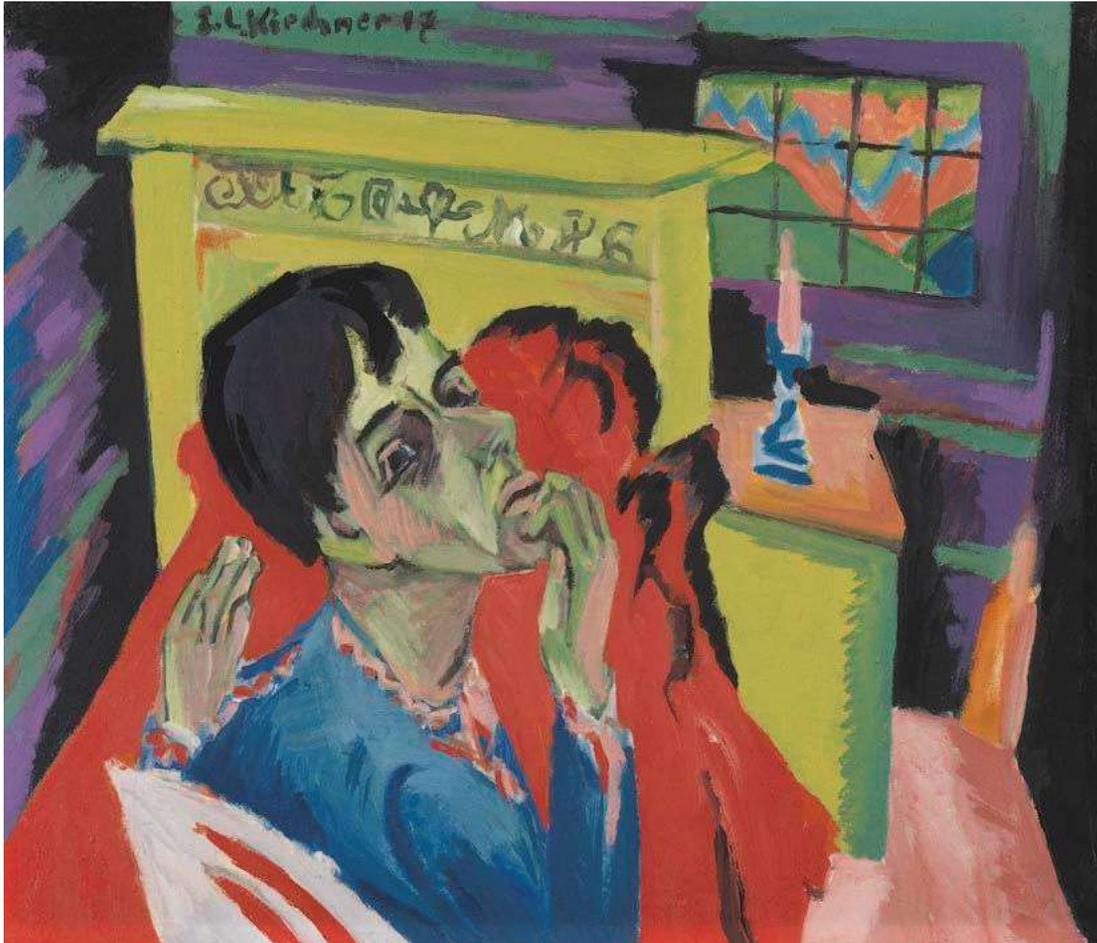
“[Abstrakte Figur](#)“ by [Oskar Schlemmer](#) is licensed under [CC BY-SA 4.0](#)



Icons and Toolbars

- Edit, send and schedule reports from main menu.
- Toolbar when running reports, can edit, alter filters and update results.
- Toolbar when editing/designing reports, Tab style interface, preview option, save options, various export formats.
- Hover over icons will describe operation.
- Email/SFTP and regular schedule delivery or reports – to be covered shortly!





Editing and Creating Reports

To modify or create from scratch?

“Selbstbildnis als Kranker (Der Kranke)” by Ernst Ludwig Kirchner is licensed under [CC BY-SA 4.0](https://creativecommons.org/licenses/by-sa/4.0/)



Editing and Creating Reports



vs.

Create Report

- Choose your data source(s) carefully, this will determine what fields you can see in your report.
- Fields in the data source drive everything else, output fields, summary report, charts and filters.



Data Sources

Required

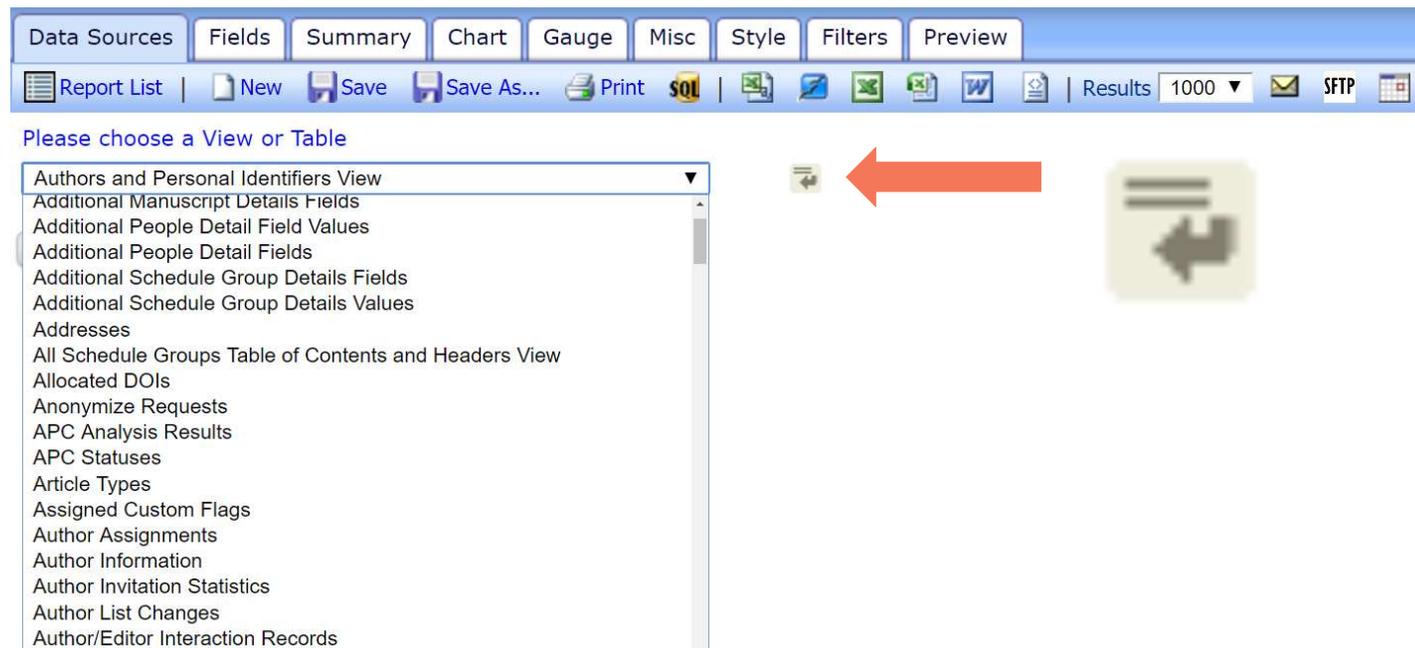


“[Studienwinkel](#)“ by [Josef Jurutka](#) is licensed under [CC BY-SA 4.0](#)



Choosing Data Sources

- Selecting a Data Source is required. Other tabs are optional.
- Use the “add data source” icon to create a second row and choose another data source if required.
- People table and People and Address View, can put names to numbers!
E.g. Who is People ID 3456...?
- Useful views have IDs converted, but configuration tables may be needed to convert some data. E.g. What is Section/Category ID 12...?



The screenshot shows a software interface with a blue header bar containing several tabs: 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the tabs is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and other functions. The main area displays a dropdown menu titled 'Please choose a View or Table' with a list of views including 'Authors and Personal Identifiers View', 'Additional Manuscript Details Fields', 'Additional People Detail Field Values', 'Additional People Detail Fields', 'Additional Schedule Group Details Fields', 'Additional Schedule Group Details Values', 'Addresses', 'All Schedule Groups Table of Contents and Headers View', 'Allocated DOIs', 'Anonymize Requests', 'APC Analysis Results', 'APC Statuses', 'Article Types', 'Assigned Custom Flags', 'Author Assignments', 'Author Information', 'Author Invitation Statistics', 'Author List Changes', and 'Author/Editor Interaction Records'. A red arrow points to a small icon on the right side of the dropdown menu, and a larger, semi-transparent icon with a hand and arrow is also visible on the right.



Choosing Data Sources

Editorial Main Menu > Reports > General Data Export > Get more help about Editorial Manager database tables and their contents

Database Content Help

Choose a TABLE from the drop-down list.

Choose Table:

- Action Locks
- Author Invitation Statistics
- Author List Changes
- Author Notification Saves
- Author Role Functions
- Author/Editor Interaction Records
- Authors**
- Authors Reviewer Preferences
- Automated Editor Summary Reminders Folders
- Automated Similarity Check Triggers
- Automated Summary Reminders
- Automatic Discussion Configurations
- Automatic Discussion Trigger Roles
- Available Custom Flags
- Available Transfer Targets
- Banner Menu Hyperlink URLs
- Batch Mail Data
- Bibliographic Searches Configuration for Role Type IDs
- Blinded Editors
- Cached PDF Files
- Calendar Attachment Trigger Points
- Check CIE File Traffic Log

Table:

Description:

Fields:

Locked A
The action

Action L
Uniquely identifies each record in the ACTION LOCKS table



Editorial Manager Database Field Definition - Google Chrome

editorialmanager.com/demoew/DBcontentHelp.asp

Choose Table:

Table: Authors [AUTHORS]
Description: Lists all Authors associated with each submission in the system.
Hints: Authors are listed for every revision of a submission. Therefore, if Alex Author submitted a manuscript that has been through 4 revisions, there will be 4 rows for Alex in this table for that particular submission.

Fields:

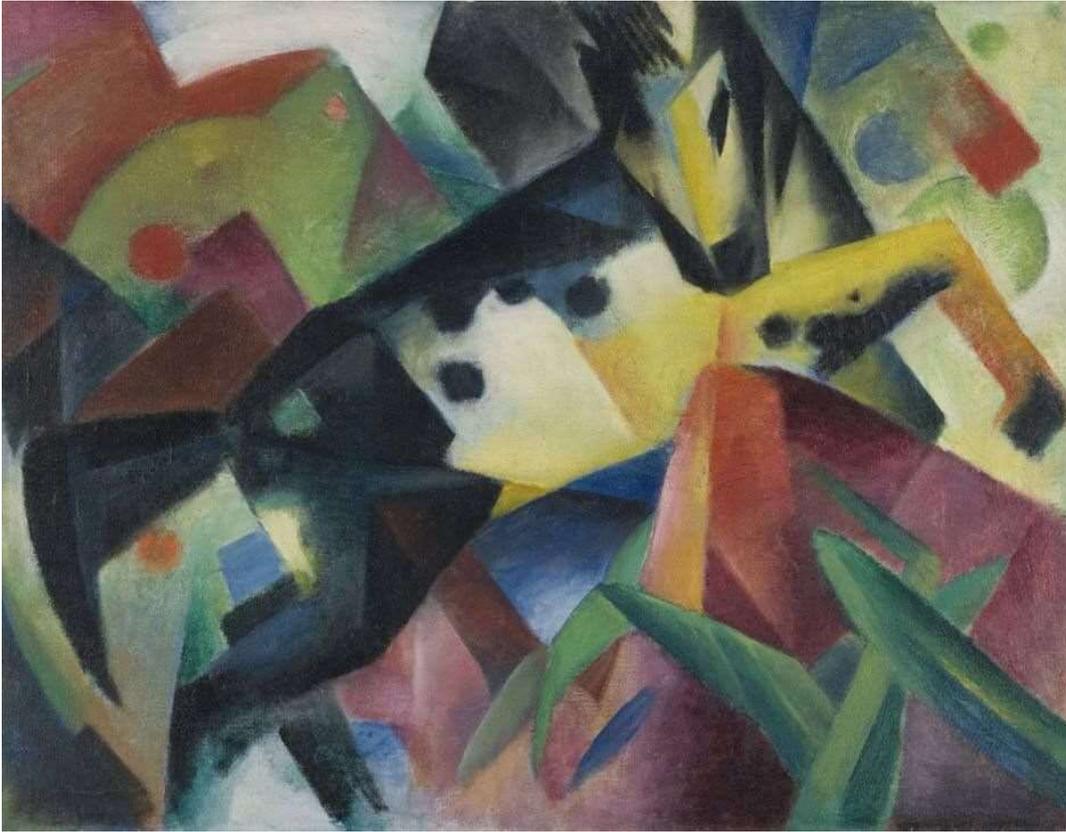
Unique Author ID [AUTHORS.AUTHID]
Unique identifier for each record in the Author table.
Hints: Each row is a unique Author/Submission/Revision # combination.

Author's First Name [AUTHORS.FIRSTNAME]
First name of the Author.

Author's Middle Name [AUTHORS.MIDDLENAME]
Middle name of the Author.

Author's Last Name [AUTHORS.LASTNAME]
Last name of the Author.
Hints: The same person will likely appear many times in this table, particularly if they have submitted more than one manuscript and/or each manuscript has gone through some phase of revision.





“Springendes Pferd” by [Franz Marc](#) is licensed under [CC BY-SA 4.0](#)

Fields

Required



Fields Tab

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print SQL SFTP

Records 1000

Field	Description	Sort	VG	A	Function	Format
Manuscript Number	Manuscript Number				...	...
Article Title	Article Title				...	...
Article Type	Article Type				...	...
Final Disposition Term	Final Disposition Te				...	...
...				

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

Report order

- Chart
- Gauges
- Summary
- Detail

X ⇌ ⇐ ⚙ ⇕

X ⇌ ⇐ ⚙ ⇕

- Fields tab allows selection of output fields.
- Fields are those available from selected Data Source(s).
- Fields selected here will appear on Detail Report.
- Quick add option.



Fields Tab – Quick Add

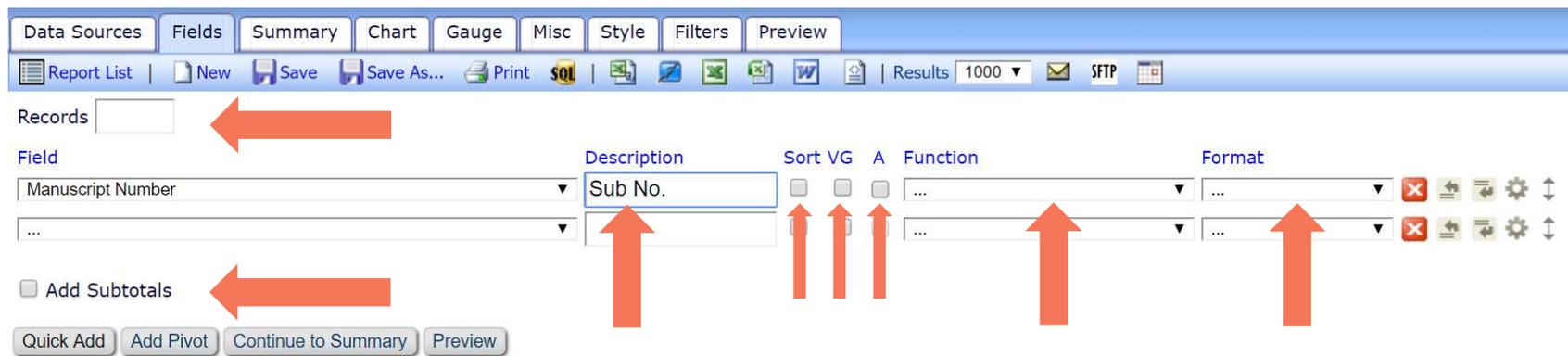
Please select the fields you'd like to add to your report.

Manuscript Status History View		Reviewers and Submissions View	
<input checked="" type="checkbox"/> Actual Online Publication Date	<input type="checkbox"/> Last Update Date	<input type="checkbox"/> Abstract	<input type="checkbox"/> Handling Editor's Description
<input type="checkbox"/> Article Title	<input type="checkbox"/> Manuscript Geographic Region of Origin	<input type="checkbox"/> Actual Online Publication Date	<input type="checkbox"/> Handling Editor's Role
<input type="checkbox"/> Article Type	<input type="checkbox"/> Manuscript Notes	<input type="checkbox"/> Address Line 1	<input type="checkbox"/> Initial Date Submitted
<input type="checkbox"/> Conference Name	<input type="checkbox"/> Manuscript Number	<input type="checkbox"/> Address Line 2	<input type="checkbox"/> Institution
<input type="checkbox"/> Conference Presentation Date	<input type="checkbox"/> MSP Full Name	<input type="checkbox"/> Address Line 3	<input type="checkbox"/> Institution ID
<input type="checkbox"/> Conference Presentation Sequence	<input type="checkbox"/> Original Publication Document ID	<input type="checkbox"/> Address Line 4	<input type="checkbox"/> Manuscript Geographic Region of Origin
<input type="checkbox"/> Conference Presentation Type	<input type="checkbox"/> Page Range	<input type="checkbox"/> Agree Date	<input type="checkbox"/> Manuscript Notes
<input type="checkbox"/> Conference Session	<input type="checkbox"/> Parent Manuscript Number	<input type="checkbox"/> All Authors	<input type="checkbox"/> Manuscript Number
<input type="checkbox"/> Conference Submission Book Title	<input type="checkbox"/> Preprint DOI	<input type="checkbox"/> Alternate Reviewer	<input type="checkbox"/> Manuscript Rating
<input type="checkbox"/> Date Final Disposition Set	<input type="checkbox"/> Print Pages of Article	<input type="checkbox"/> Alternate Reviewer Selection Date	<input type="checkbox"/> Number of days review was late

- All Fields shown from selected Data Source(s).
- Hovering on truncated descriptions shows full text.



Fields Tab



- Limit number of records returned.
- Enter your own description for fields.
- Functions are available e.g. average, count, convert dates to days old.
- Formats can be applied to fields e.g. convert numbers to percentages.
- Subtotals can be added to numerical fields.



Fields Tab – No Visual Grouping

Sub No.	Reviewer Last Name
DEMOEW-D-19-00001	Commentator
DEMOEW-D-19-00001	Appraiser
DEMOEW-D-19-00001	Analyst
DEMOEW-D-19-00005	Referee
DEMOEW-D-19-00005	Sturmig
DEMOEW-D-19-00005	Commentator
DEMOEW-D-19-00004	Referee
DEMOEW-D-19-00004	Critic
DEMOEW-D-19-00004	Sturmig
DEMOEW-D-19-00006	Referee
DEMOEW-D-19-00006	Sturmig
DEMOEW-D-19-00006	Commentator
DEMOEW-D-19-00006	Solicitor
DEMOEW-D-19-00006	Reviewer
DEMOEW-D-19-00002	Critic
DEMOEW-D-19-00002	Linguist
DEMOEW-D-19-00002	Referee
DEMOEW-D-19-00002	Commentator



Fields Tab – Visual Grouping

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print SQL | | | | | | | Results 1000 SFTP

Records

Field	Description	Sort	VG	A	Function	Format				
Manuscript Number	Sub No.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewer Last Name	Reviewer Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview



Fields Tab – Visual Grouping

Data Sources		Fields	Summary	Chart	Gauge	Misc	Style	Filters	Preview		
Report List	New	Save	Save As...	Print	SQL					Results 1000	SFTP
Analyst											
Sub No.											
DEMOEW-2019-000128											
DEMOEW-2019-000142											
DEMOEW-2019-000143											
DEMOEW-D-19-00001											
Appraiser											
Sub No.											
DEMOEW-2019-000132											
DEMOEW-2019-000143											
DEMOEW-D-19-00001											
DEQL-2019-000102											
Beesley											
Sub No.											
DEMOEW-2019-000139											
DEMOEW-2019-000143											
Braun											
Sub No.											
DEMOEW-2019-000128											
DEMOEW-2019-000130											



Summary Tab

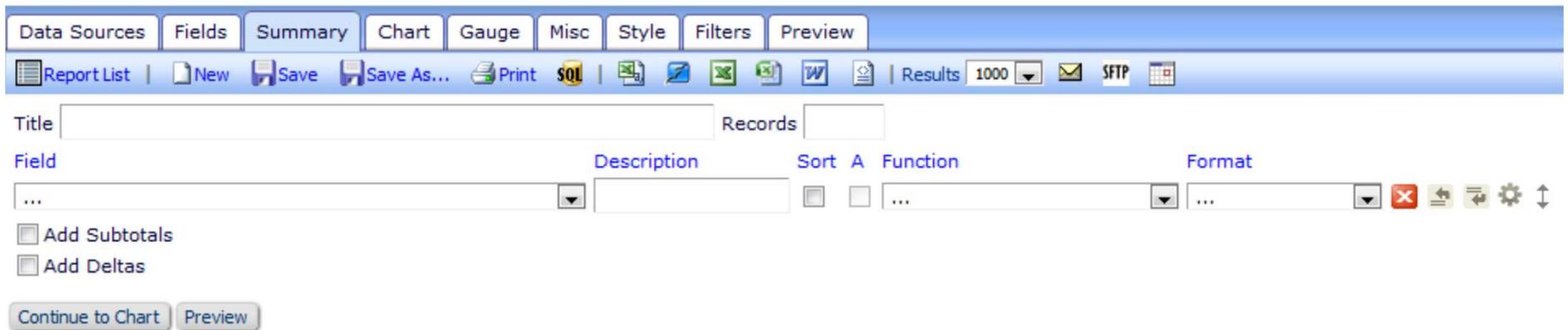
Optional



“[Der Flurplan](#)” by [Otto Keck](#) is licensed under [CC BY-SA 4.0](#)

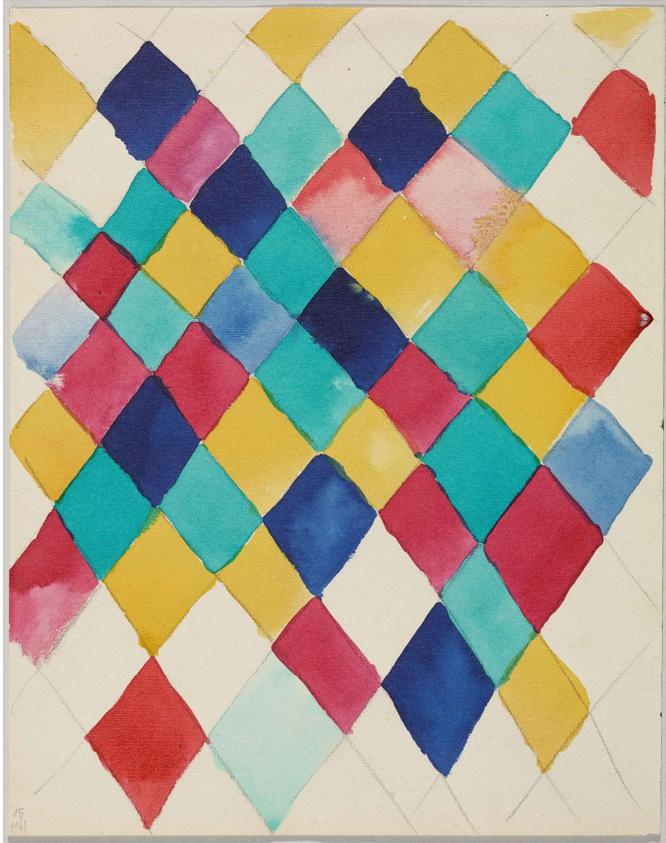


Summary Tab



- The Summary tab also shows all the fields available from the selected Data Source(s).
- Selecting a field here puts it on the Summary Report. 
- Can also use Description, Sort, Arithmetic, Functions, Formats, Subtotals and Advanced Field Settings.





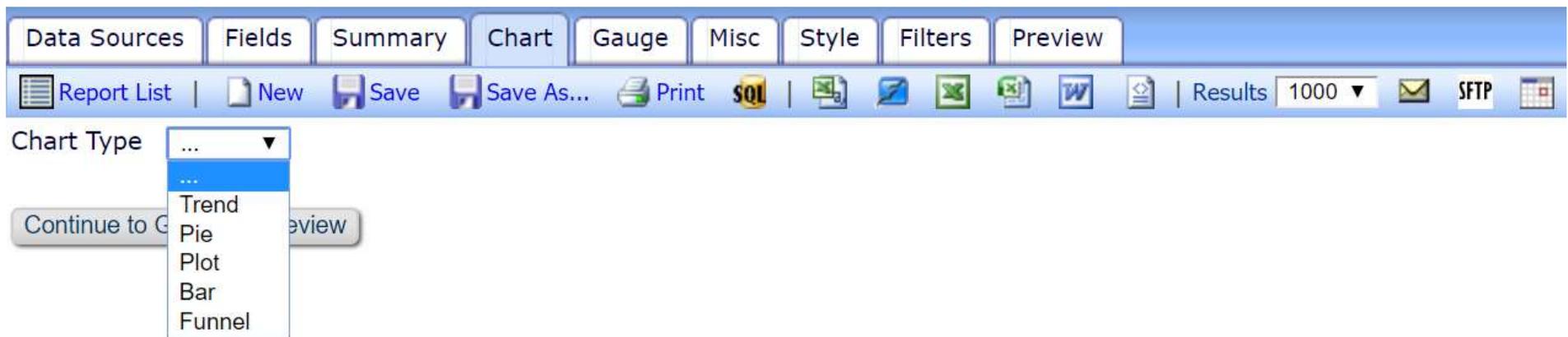
“Farbstudie mit Rauten” by [Wassily Kandinsky](#) is licensed under [CC BY-SA 4.0](#)

Charts and Gauges

Optional



Charts and Gauges



- The Chart tab allows selection of type of Chart (graph).
- Once selected, other options relevant to that type of Chart are displayed.
- Gauges tab allows inclusion of different graphical representation of data.
- Can be ordered alongside the detail and summary reports



Charts and Gauges

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print sql | | | | | Results 1000 SFTP

Chart Type Pie

Title Records

Label Days in Editorial Status Function Group Sort Sort (z-a)

Value Days in Editorial Status Function Count Sort Sort (z-a)

Separator ... Function ...

Show Legend

Show As 3D

Explode largest slice

Show Percentage

Show Value Labels

Show Slice Labels

Combine Bottom %

Chart Type Pie

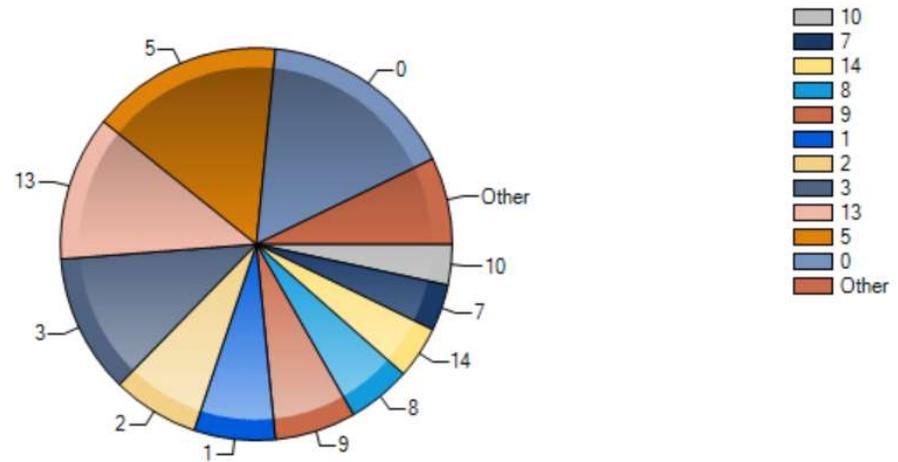
Target report ...

Advanced Properties 

Continue to Gauge Preview



Charts and Gauges



Analyst

	Sub No.
DEMOEW-2019-000128	
DEMOEW-2019-000142	
DEMOEW-2019-000143	
DEMOEW-D-19-00001	



Charts and Gauges

Data Sources Fields Summary Chart **Gauge** Misc Style Filters Preview

Report List | New Save Save As... Print SQL | | Results 1000 SFTP

Title Results 1

Name

Value Function

Sort Function Sort (z-a)

Minimum Maximum

Color

Gauge Style Radial Radial 2 Linear

Target report Effect

Continue to Misc Preview



Sharing Reports

Optional



"Salve" by [Alexander von Salzmann](#) is licensed under [CC BY-SA 4.0](#)



Sharing Reports

- Misc tab allows you to add a title, description and header and footer for your report.
- Set sharing rights for your reports.
- None – Not shared.
- Full Access – Can run edit, resave and save over your report.
- Read Only – Can run, edit and save own version.
- View Only – Can run (and change filters if set.)
- You can choose L(ef), R(ight), or M(iddle) to select where the Title etc. display

The screenshot shows a software interface for configuring a report. At the top, there is a menu bar with tabs: Data Sources, Fields, Summary, Chart, Gauge, Misc, Style, Filters, and Preview. Below the menu bar is a toolbar with icons for Report List, New, Save, Save As..., Print, SQL, and other functions. The main area contains several text input fields with justification options (L, R, M) to their right:

- Title:** "Decisions by Handling Editor" (Justification: M)
- Description:** "A handy guide to editor choices" (Justification: R)
- Header:** "Best Report" (Justification: L)
- Footer:** "Copyright 2020" (Justification: L)

Below these fields are two dropdown menus:

- Share With:** "Everyone"
- Rights:** A dropdown menu with options: Full Access, None (highlighted), Full Access, Read Only, View Only.

At the bottom, there are two buttons: "Continue to Style" and "Preview". To the right of the Rights dropdown is a "Drill-Down Key" dropdown menu.

A red arrow points from the 'M' justification icon next to the Title field to a separate box containing the letter 'L'.





“Hutladen” by [August Macke](#) is licensed under [CC BY-SA 4.0](#)

Styling Reports

Optional



Styling Reports

- The Style tab allows color selection and styling options.
- Options are available for PDF of report.
- Set order of appearance for the parts of your report
- Fill Zero Data Between Dates allows e.g. months to show with zero submissions, instead of omitting the month from report.

Report List | New | Save | Save As... | Print | SQL | Results 1000 | SFTP

Border color (Default) | Header color (Default) | Header foreground color (Default)

Item color (Default) | Item foreground color (Default) | Alternating item color (Default)

Restore Default

Number	Letter
1	A
2	B

Fill Zero Data Between Dates

Landscape printing

Show page number

Show date and time

Use pagination in web view

Add bookmark for each visual group

Page Break After Visual Groups

Minimize Grid Width

Visual Group Style: Comma Delimited

Items Per Page (In Viewer): 100

Report order

- Chart
- Gauges
- Summary
- Detail

Field|Value column pairs: 2

Show main report in Field | Value style

Show summary report in Field | Value style

Continue to Filters | Preview

Fill Zero Data Between Dates

Report order

- Chart
- Gauges
- Summary
- Detail



Filters

Optional, but advisable!



“Roter Fleck II” by [Wassily Kandinsky](#) is licensed under [CC BY-SA 4.0](#)



Filters

The screenshot displays the 'Filters' tab in a software application. The interface includes a menu bar with options like 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the menu bar is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', 'SQL', and others. The main area is divided into sections: 'Filter Field' (with a dropdown menu showing '1'), 'Operator' (with a dropdown menu showing '...'), and 'Value(s) Blank Param' (with a checked checkbox and a red 'X' icon). Below these are 'Require' and 'Parameters in Viewer' dropdowns, and a 'Filter Logic' text box containing the example logic 'Ex:(1 OR 2) AND (3 OR 4)'. A 'Preview' button is located at the bottom left. Three red arrows point to the 'Operator' dropdown, the 'Param' checkbox, and the 'Preview' button.

- The Filters tab allows filtering of results by any field from the data source(s). Multiple filters can be used. (Similar to Custom Report or General Data Export selection criteria pages).
- To have the filter appear on the results page so that others can use it when running the report, select the 'Param' checkbox.
- Can also add logic for filters.



Filters

- Various options for filtering.
- Field in one data source can be set to equal the same field from other data source e.g. second join on revision number.

The screenshot displays a software interface with a menu bar at the top containing 'Data Sources', 'Fields', 'Summary', 'Chart', 'Gauge', 'Misc', 'Style', 'Filters', and 'Preview'. Below the menu bar is a toolbar with icons for 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'SQL'. The main area is divided into three sections: 'Filter Field', 'Operator', and 'Value(s) Blank Param'. The 'Filter Field' section has a dropdown menu with '1' selected. The 'Operator' section has a dropdown menu with a list of operators including 'Blank', 'Isn't Blank', 'Use Previous OR', 'Boolean', 'Comparison', and 'Date & Time'. The 'Value(s) Blank Param' section has a dropdown menu with a list of operators including 'Equivalence', 'Field Comparison', and 'String'. The 'Filter Logic' field contains the text 'Ex:(1 OR 2) AND (3 OR 4)'. A 'Preview' button is located below the 'Filter Logic' field.

Filter Field	Operator	Value(s) Blank Param
1

Require ... Parameters in Viewer

Filter Logic Ex:(1 OR 2) AND (3 OR 4)

Preview

Operator List:

- Blank
- Isn't Blank
- Use Previous OR
- Boolean**
- True
- False
- Comparison**
- Is Less Than
- Is Greater Than
- Between
- Isn't Less Than
- Isn't Greater Than
- Isn't Between
- Date & Time**
- Between
- In Time Period
- Less Than Days Old
- Greater Than Days Old
- Equals Days Old

Value(s) Blank Param List:

- Equivalence**
- Equals
- Equals (List)
- Equals (Select)
- Equals (Multiple)
- Equals (Popup)
- Doesn't Equal
- Doesn't Equal (Select)
- Doesn't Equal (Multiple)
- Doesn't Equal (Popup)
- Field Comparison**
- Is Less Than (Field)
- Is Greater Than (Field)
- Equals (Field)
- Not Equals(Field)
- String**
- Like
- Begins With
- Ends With
- Isn't Like



“[Lovis Corinth an Carl Strathmann](#)” by [Lovis Corinth](#)
is licensed under [CC BY-SA 4.0](#)

Email and Scheduling Capabilities

Optional, but useful!



Email and Scheduling



Available from main menu or on toolbars

- Envelope icon – ad hoc one time email of chosen report.
- SFTP – Can deliver directly to your SFTP site.
- Calendar Icon – regular scheduled (email/sftp) delivery of report, permission restricted in Role Manager.
- Deliveries can be daily, weekly, monthly or quarterly.
- Letter configured in Policy Manager > Edit Letters.
- Email can contain deep link if sent to editors with permissions to run reports.
- Alternatively, delivery can include PDF/Excel/CSV/XML of chosen report.
- Merge Fields available for letter:
 - %REPORT_NAME%
 - %LIVE_REPORT_DEEP_LINK%
 - %SCHEDULE_DESCRIPTION%
 - %NUMBER_OF_REMAINING_DELIVERIES%



SFTP



Send Report over SFTP

Enter the information for the SFTP site to which you would like to transmit the report. Reports must be transmitted using SFTP.

SFTP Server Address (e.g. sftp.ariessys.com):	<input type="text"/>
Username:	<input type="text"/>
Password:	<input type="text"/>
Subdirectory:	<input type="text"/>
Email Address (for transmittal notification):	<input type="text"/>
<input type="checkbox"/> Include PDF of report	
<input type="checkbox"/> Include Excel file of report	
<input type="checkbox"/> Include CSV of report	
<input type="checkbox"/> Include XML of report	

- Delivery can include PDF/Excel/CSV/XML of chosen report.
- Customize recipient SFTP on the fly



Emailing Reports



Send Report by E-mail

The publication has pre-configured one or more letters which you may use as a starting point. Select a letter, then click 'Customize Letter' to open the letter, insert your comments, and send the letter.

Please choose a letter.

Cancel

Customize Letter

- Can configure multiple letters for different uses.
- Enterprise Analytics Reporting letter family.
- Option to customize both ad hoc and scheduled delivery letters.



Emailing Reports – Letter Options

- Editor recipient list.
- Hardcoded recipient/cc/bcc.
- Optional cc/bcc email address entry.
- Choice of attachment options:
 - PDF
 - Excel
 - CSV
 - XML

From: mary mary <trash1@ariessc.com>

To: Selected Editors:

ALL EDITORS
ASSIGNED EDITOR
COPY EDITOR
Celia CopyeDITOR
EDITOR IN CHIEF
Eddie Editor-in-Chief
EDITORIAL ASSISTANT
INVITED EDITOR
Eduardo Invited Editor
MANAGING EDITOR
Melanie Cotterell

hardcodedrecipient@office.com

Letter Subject: Publication Report

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:

Attach PDF of report to Letter
 Attach Excel file of report to Letter
 Attach CSV of report to Letter
 Attach XML of report to Letter

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

Dear %TITLE% %LAST_NAME%,

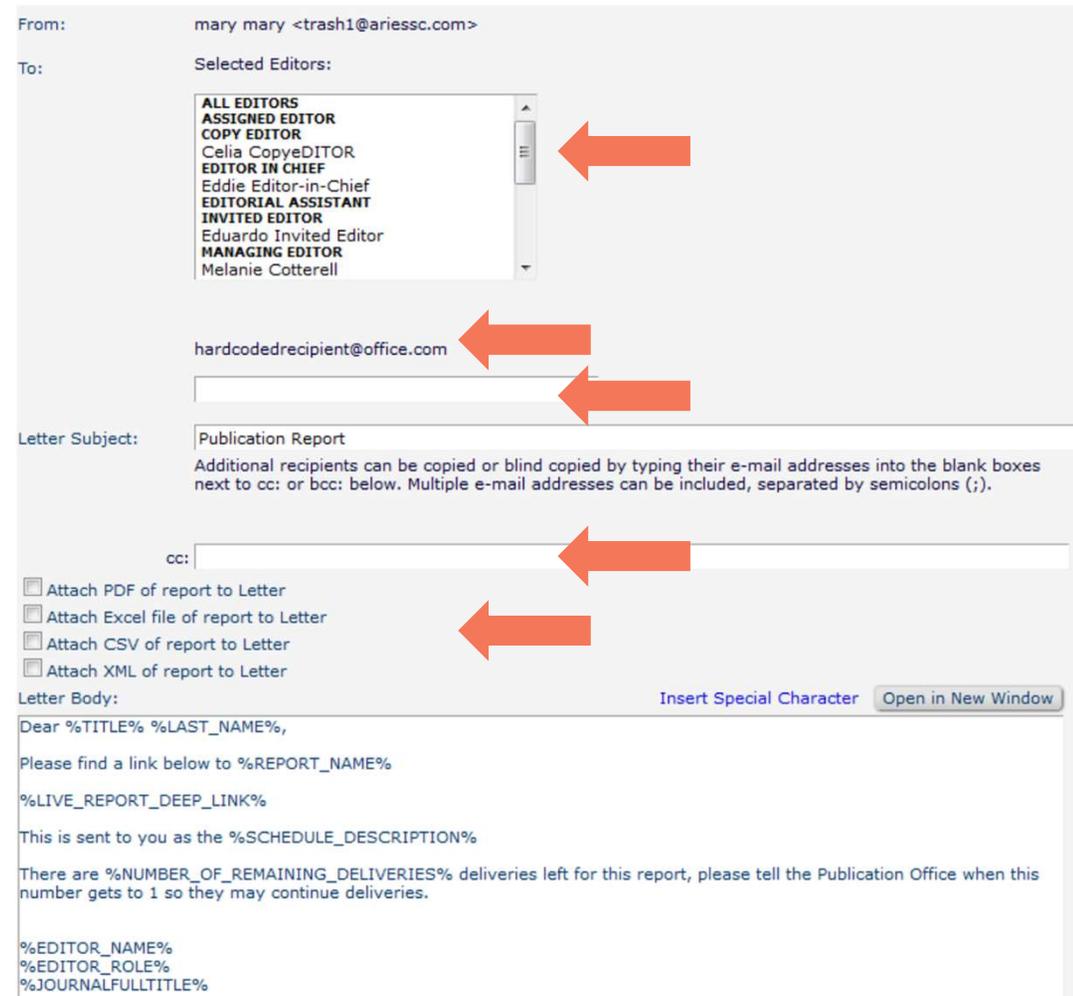
Please find a link below to %REPORT_NAME%

%LIVE_REPORT_DEEP_LINK%

This is sent to you as the %SCHEDULE_DESCRIPTION%

There are %NUMBER_OF_REMAINING_DELIVERIES% deliveries left for this report, please tell the Publication Office when this number gets to 1 so they may continue deliveries.

%EDITOR_NAME%
%EDITOR_ROLE%
%JOURNALFULLTITLE%



Scheduling



- Choose Email or SFTP.
- Select Letter and Customize.
- Daily schedule can be set to working or calendar days.
- Edit existing schedules to add more deliveries (max 500).

New Delivery Schedule for this report

Schedule Description:	Insert Special Character Maximum 200 characters
Delivery Frequency:	Weekly <input type="button" value="v"/>
First Delivery Date:	Date 12/03/2019 <input type="button" value="calendar"/> (mm/dd/yyyy)
Number of Deliveries:	End after: 5 <input type="button" value="v"/> total deliveries
Delivery Method:	<input checked="" type="radio"/> Email <input type="radio"/> SFTP
Letter:	Please Choose a Letter <input type="button" value="v"/> <input type="checkbox"/> Attach PDF of report to email <input type="checkbox"/> Attach Excel file of report to email <input type="checkbox"/> Attach CSV of report to email <input type="checkbox"/> Attach XML of report to email

Delivery Method:	<input type="radio"/> Email <input checked="" type="radio"/> SFTP
SFTP Options:	SFTP Server Address (e.g. reports.customer.net): <input type="text"/> Username: <input type="text"/> Password: <input type="text"/> Subdirectory: <input type="text"/> Email Address (for transmittal notification): <input type="text"/> <input type="checkbox"/> Include PDF of report <input type="checkbox"/> Include Excel file of report <input type="checkbox"/> Include CSV of report <input type="checkbox"/> Include XML of report

Saved Delivery Schedule and Letters for this Report

Click 'Remove' if you want to permanently remove this delivery schedule. Click 'Edit' to edit the criteria and letter saved for the delivery schedule.

Schedule Description	Frequency	Number of Remaining Deliveries	Most Recent Delivery Date	Next Scheduled Delivery Date	Delivery Method	Actions
EIC ORCID Report	Weekly	2	12/02/2019	12/09/2019	Email	Edit Remove



Scheduling

RoleManager > Administrative and Reporting Functions > Produce Reports

Administrative and Reporting Functions

System Administration Functions

Unrestricted Access

Restricted Access

Produce Reports

Schedule Reports

Run Cross-Publication Custom Reports

em Editorial Manager™
HOME • LOGIN • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS • PRIVACY
Not logged in.

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

Deep Link Error

Enterprise Reporting

Sorry, you cannot view this report. You do not have permission to view reports within the system. You may login to take other actions within the system.

[Login to Editorial Manager](#) [Send Login Details](#)

em Editorial Manager™
HOME • LOGIN • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS • PRIVACY
Not logged in.

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

Deep Link Error

Enterprise Reporting

Sorry, you cannot view this report. You do not have permission to view reports within the system. You may login to take other actions within the system.

[Login to Editorial Manager](#) [Send Login Details](#)



Quick Troubleshooting Tips

Dude, where's my data?



“[Der verlorene Handshuh](#)” by [Carl Strathman](#) is
licensed under [CC BY-SA 4.0](#)



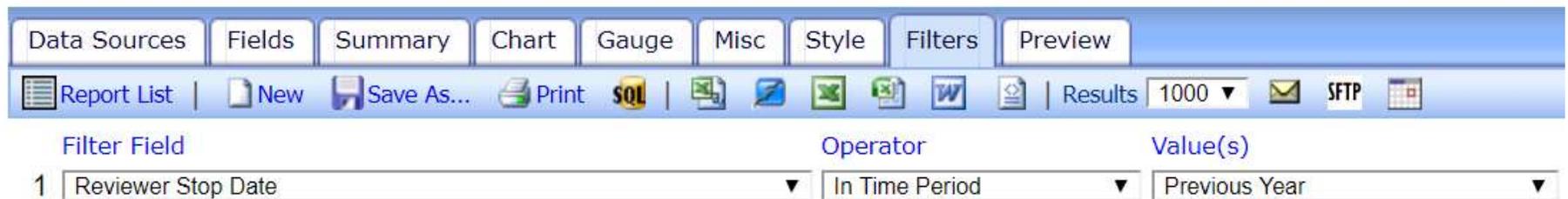
Troubleshooting

- Ever run a report and see this?

Reviewers completing the most reviews - top 25 Reviewers

No Results

- Check your filters!



The screenshot shows a report builder interface with a toolbar at the top containing tabs for Data Sources, Fields, Summary, Chart, Gauge, Misc, Style, Filters, and Preview. Below the toolbar is a row of icons for Report List, New, Save As..., Print, SQL, and other functions. The main area displays a filter configuration table with the following columns: Filter Field, Operator, and Value(s). The first row shows a filter for 'Reviewer Stop Date' using the 'In Time Period' operator with the value 'Previous Year'.

Filter Field	Operator	Value(s)
1 | Reviewer Stop Date	| In Time Period	| Previous Year



Troubleshooting

- Churning...

Field	Description	Sort	VG	A	Function	Format
Reviewer Last Name	Reviewer Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	▼ ...
Reviewer First Name	Reviewer First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	▼ ...
Reviewer People ID	Reviewer People ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	▼ ...
E-mail Address	E-mail Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	▼ ...
Review Complete	Sum(Review Comp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	▼ ...
Reviewer Declined Invitation	Sum(Reviewer Dec	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	▼ ...



Troubleshooting

- Rename your reports!

Shared Reports

Editorial Reports

- CHMT Monthly Report for Testing
- ORDE Test Report
- People and Classifications PLUS Title

EEMUG 2020

- Accept and Reject Decisions by Editor in selected timeframe
- Article Types (Current Year)
- Test Report

Standard Reports

Editorial Reports

- Accept and Reject Decisions by Editor in selected timeframe
- Accept and Reject Decisions in selected timeframe
- Average Days to Decision by Editor
- Completed Reviews Detail Report
- Editor Submission Counts - All editors by Role



Troubleshooting



The screenshot shows a software toolbar with several buttons: 'Data Sources', 'Fields', 'Summary', 'Chart', and 'G'. Below these are 'Report List', 'New', 'Save', and 'Save As...'. A red arrow points from the 'Report List' icon to a 'Records' input field. Another red arrow points from the 'Records' field to the 'Enterprise Analytics Reporting' section.

Enterprise Analytics Reporting

[Create Report](#)

[Get more help about database tables and their contents](#)

[Get more help about Views and their contents](#)

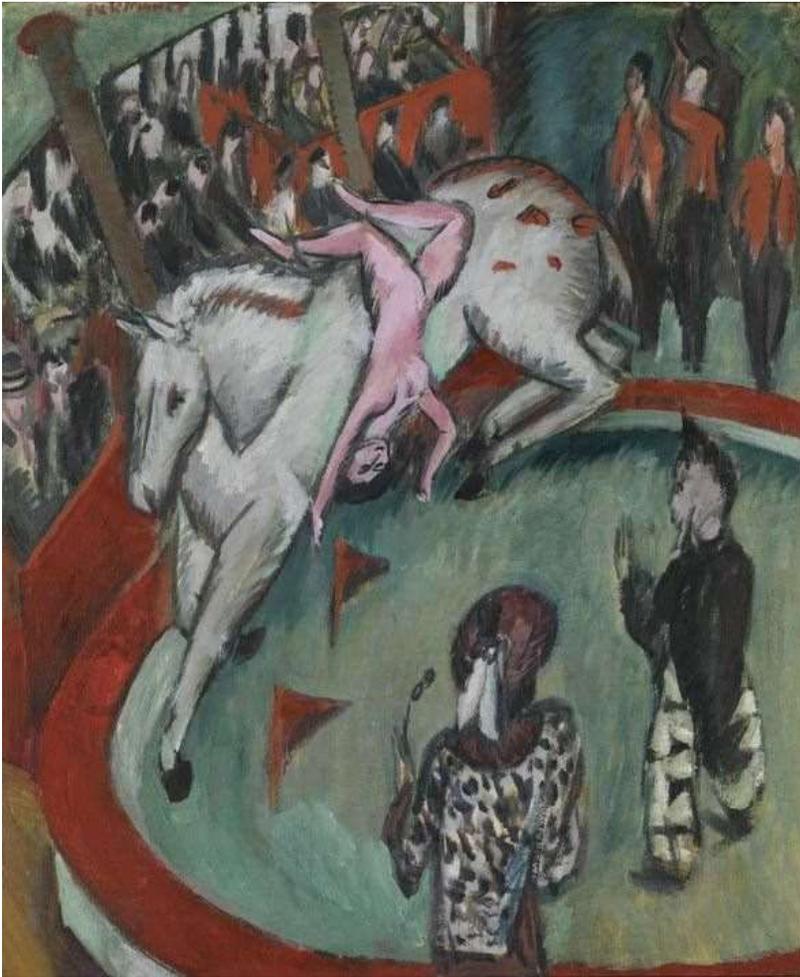
Shared Reports

- Editorial Reports**
 - [CHMT Monthly Report for Testing](#)
 - [ORDE Test Report](#)
 - [People and Classifications PLUS Title](#)
- My Reports**
 - [Test Report](#)

Standard Reports

- Editorial Reports**





“Zirkus (Zirkusreiterin)“ by [Ernst Ludwig Kirchner](#) is licensed under [CC BY-SA 4.0](#)

Live Demo



Resources

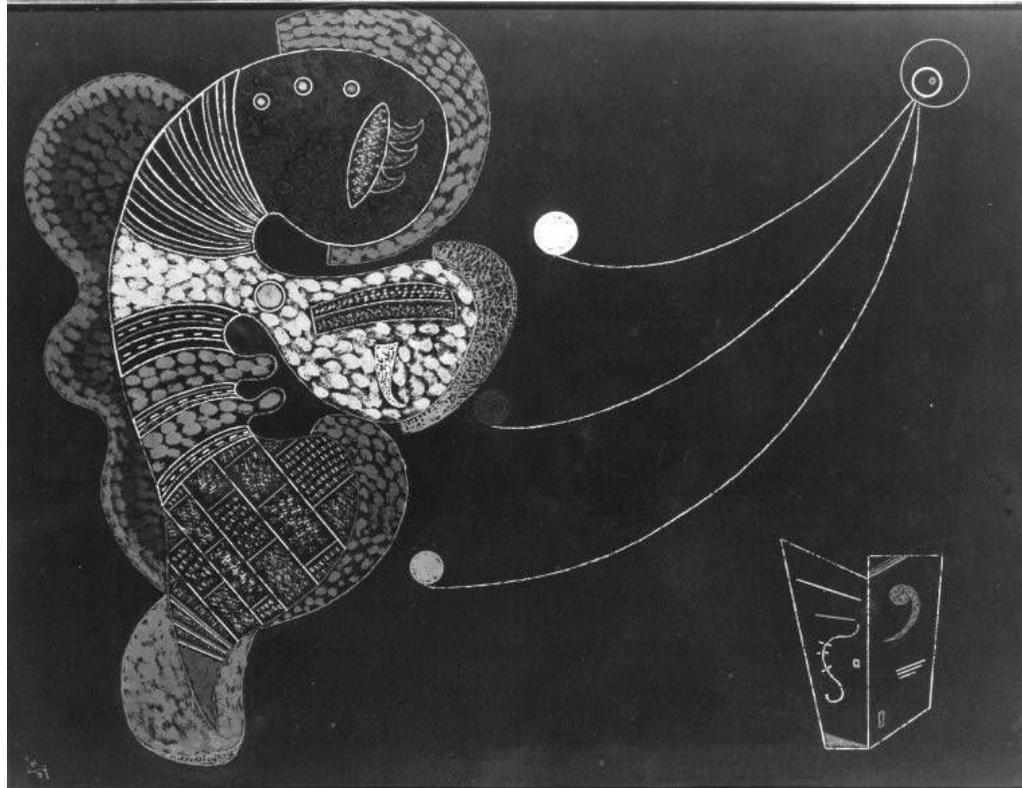
- EAR Webinars:
[ENTERPRISE ANALYTICS REPORTING \(EAR\) WEBINARS](#)
- EAR Videos:
[Enterprise Analytics Reporting \(EAR\) Series](#)
- Advanced EAR Sessions at EMUG and EEMUG
- Your Account Coordinator



“Der Geist im Hausgestühl: Stilleben mit Katze” by [August Macke](#) is licensed under [CC BY-SA 4.0](#)



Questions?



“Le Gros et le Mince” by [Wassily Kandinsky](#) is licensed under [CC BY-SA 4.0](#)



EEMUG 2020



#EEMUG2020

Thank you!

