



Welcome to the 16TH Annual **EMUG** **BOSTON**

#EMUG2018

 Editorial Manager®  ProduXion Manager®



Co-Author Workflows & Functionality

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- Co-Author Verification
- Journal Office Author Visibility
- Other Author Notifications
- Co-Authors on the Transmittal Form
- ORCID solicitation
- CRediT (w/Special Guest: Anne Tran - PLOS)

Agenda

Co-Author Verification

There are 3 options for Co-Author Verification:

1. Corresponding Author Only
2. Co-Authors verify upon new submission/revision
3. Co-Authors register and verify upon new submission/revision

1. Corresponding Author Only

- The Co-Author information is stored with other manuscript data, but there is no contact with the Co-Authors
- All communication is with the Corresponding Author only
- Not really a true “verification” of Co-Authors



2. Co-Authors verify upon new submission/revision



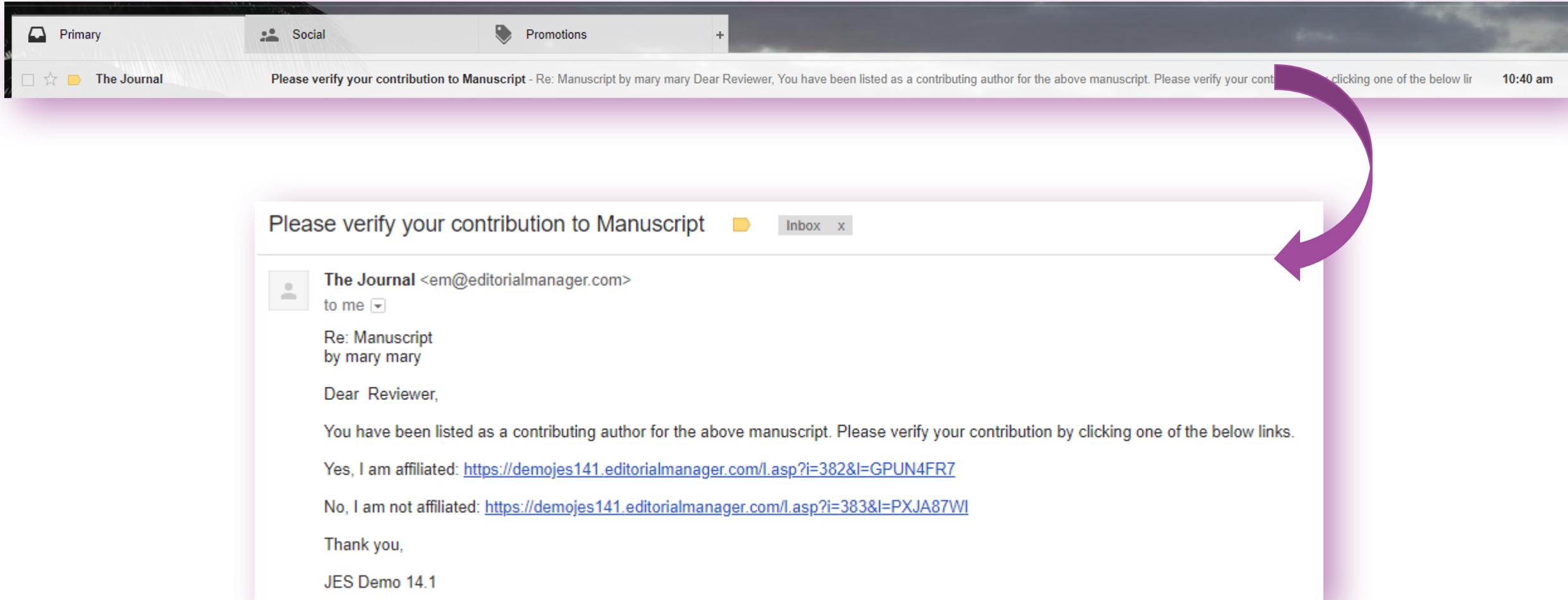
- Triggers a link that goes out in a letter to Co-Authors so that they can confirm their participation with the submission
- No login required

3. Co-Authors register and verify upon new submission/revision

- Required Co-Authors to *register* in EM to confirm their participation with the submission
- Login required
- Can be achieved via letter



Co-Author Verification Letter:



The screenshot shows an email client interface. At the top, there are tabs for 'Primary', 'Social', and 'Promotions'. Below the tabs, the email subject is 'Please verify your contribution to Manuscript - Re: Manuscript by mary mary'. The sender is 'The Journal' with the email address '<em@editorialmanager.com>'. The email content is as follows:

The Journal <em@editorialmanager.com>
to me ▾

Re: Manuscript
by mary mary

Dear Reviewer,

You have been listed as a contributing author for the above manuscript. Please verify your contribution by clicking one of the below links.

Yes, I am affiliated: <https://demojes141.editorialmanager.com/l.asp?i=382&I=GPUN4FR7>

No, I am not affiliated: <https://demojes141.editorialmanager.com/l.asp?i=383&I=PXJA87WI>

Thank you,

JES Demo 14.1

A purple arrow points from the subject line of the email to the main content area.

Co-Author Verification Configurations

- Article Type configuration: System Administrator Functions > PolicyManager > Edit Article Types > Select Article Type to edit > Co-Author Parameters:

Co-Author Parameters

Register/Verify Other Authors

Co-Authors verify on new submission

Corresponding Author only

Co-Authors verify on new submission

Co-Authors register and verify on new submission

Co-Authors verify on revision

Co-Authors register and verify on revision

Display Author Questionnaire to Co-Authors



This asks the author to retrieve their ORCID using a secure Authentication mechanism during Co-Author Verification.

Select this box to require Co-Authors to respond to the Author Questionnaire in order to confirm contributing authorship.

Journal Office Visibility on Co-Authors

Editorial Manager has many ways for the Journal Office to gain visibility on their Co-Authors:

- Reporting
- Author Status Page
- Author Questionnaire
- ORCID^s
- Contributor Roles



Chasing Co-Authors who have not verified

- Co-Author Reminder Report:

Co-Author Reminder Report

Content: All Co-Author verification requests that have been outstanding for 5 or more days.

Check the checkbox if you want to send a reminder to the Co-Author for that submission. You will have the opportunity to customize the individual reminder letters after clicking the 'Send Reminders' button.

Check All Clear All
Page: 2 of 2 (18 total submission records) |< << 1 :

Send Reminder	Manuscript Number	Article Type	Article Title	Editorial Status	Co-Author Name	Co-Author E-mail Address	First Assigned Editor	Handling Editor	Initial Date Submitted				
<input checked="" type="checkbox"/>	WEBDEM-D-16-00012 Details History	Original Study	demo	Revise	m c	c@trash.com	mary mary		Jun 13, 2016				
<input type="checkbox"/>	WEBDEM-D-16-00013 Details History	Original Study	EMUG demo	Manuscript Submitted	Jane Doe	doe@trash.com			Jun 14, 2016				
<input checked="" type="checkbox"/>	WEBDEM-D-16-00016 Details History	Original Study	EMUG 2016	Under Review	Melanie Cotterell	mcotterell@ariessys.com	Mary Smith	Mary Smith	Jun 16, 2016	Jun 16, 2016	701	0	
<input type="checkbox"/>	WEBDEM-D-16-00018 Details History	Original Study	EEMUG 2017	Required Reviews Completed	Melanie Cotterell	mcotterell2@ariessys.com	Mary Smith	Mary Smith	Dec 30, 2016	Dec 30, 2016	504	0	
<input checked="" type="checkbox"/>	WEBDEM-D-17-00001R1 Details History	Original Study	EEMUG other	Under Review	Lincoln Hawthorne	jenfleet@yahoo.com	Ellen Editor	Ellen Editor	Jan 04, 2017	Jan 04, 2017	Jan 04, 2017	499	0
<input checked="" type="checkbox"/>	WEBDEM-D-17-00001R1 Details History	Original Study	EEMUG other	Under Review	Brian Papa	bpapa@trash.com	Ellen Editor	Ellen Editor	Jan 04, 2017	Jan 04, 2017	Jan 04, 2017	499	0
<input type="checkbox"/>	WEBDEM-D-17-00002 Details History	Original Study	EEMUG 2017	Revise	Elizabeth Hopkins	bhopkins@ariessys.com	Dianne Gullo		Jan 12, 2017	Jan 12, 2017	491	0	
<input type="checkbox"/>	WEBDEM-D-17-00005 Details History	Original Study	Transfer co-author questionnaire	Submission Transferred	Victoria Scibilia	vscibilia@ariessys.com			Apr 11, 2017	Apr 11, 2017	402	0	

Co-Author Reminder Report

Display outstanding requests for verification sent or more days ago.

 Display outstanding requests for verification sent between and (mm/dd/yyyy)

First Assigned Editor:

 Handling Editor:

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, the 'Command' key is used while using the mouse to click the desired items.

Article Type:

[Select All](#)

[Clear All](#)

Section/Category:

[Select All](#)

[Clear All](#)



Co-Author Reminder Report Configurations

- Editor Main Menu > Reports > Author Reminder Reports:

The screenshot shows the Editor Main Menu interface with three main sections: 'Managing Editor Main Menu', 'Editor 'To-Do' List', and 'Administrative Functions'. A vertical arrow on the left points down from the menu header to the 'Administrative Functions' section. A horizontal arrow points from the 'Administrative Functions' section to the right, indicating the path to the Reports page.

Managing Editor Main Menu

Quick Searches:
With Ed Status
With Ed Status 2

Search
Search Submissions | Search People

Editor 'To-Do' List

My Pending Assignments (22)

- New Submissions (15)
- Revised Submissions (0)
- New Submissions Requiring Assignment (2)
- Revised Submissions Requiring Assignment (0)
- Submissions Sent Back to Author for Approval (1)
- New Assignments (0)
- Submissions with Required Reviews Complete (1)
- Submissions Requiring Additional Reviewers (0)
- Submissions with One or More Late Reviews (0)
- Submissions with Active Discussions (3)

Reviews in Progress (0)

- Reviewers Invited - No Response (0)
- Submissions Under Review (0)

Administrative Functions

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

The screenshot shows the Reports page with three main sections: 'Report Tools', 'Status Reports', and 'Author Reminder Reports'. A large curved arrow points from the 'Administrative Functions' section of the previous screenshot to the 'Reports' page. A horizontal arrow points from the right towards the 'Co-Author Reminder Report' link in the 'Author Reminder Reports' section.

Reports

Report Tools

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

Status Reports

- Accepted Manuscripts Without a Publication Date
- Current Status Report
- Publishing Pipeline Report
- Published Table of Contents Report
- Editor's To-Do List Report
- Current Role Designations Report

Author Reminder Reports

- Co-Author Reminder Report
- Author Revision Status Report
- Author Revision Reminder Report
- Automated Author Revision Reminder Report

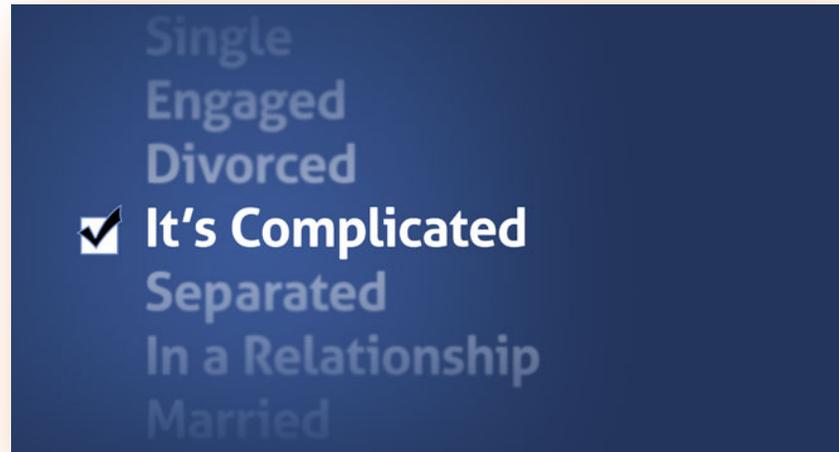
Co-Author Reporting

Helpful Co-Author Data to use in reports:

- Authors View (Enterprise Analytics Reporting or EAR)
- Authors and Personal Identifiers View (EAR)
- Authors and Submissions View (EAR)
- Contributor Information (EAR)
- Author Table (General Data Export or GDE)

Authors and Personal Identifiers View	
<input type="checkbox"/> Actual Online Publication Date	<input type="checkbox"/> Editorial Submission
<input type="checkbox"/> Article Title	<input type="checkbox"/> Equal Contribution Status
<input type="checkbox"/> Article Type	<input type="checkbox"/> Final Decision Date
<input type="checkbox"/> Author Type	<input type="checkbox"/> Final Disposition Term
<input type="checkbox"/> Author's Academic Degree	<input type="checkbox"/> ID of Editor who made Final Decision
<input type="checkbox"/> Author's Address Line 1	<input type="checkbox"/> Initial Date Submitted
<input type="checkbox"/> Author's Address Line 2	<input type="checkbox"/> ISNI
<input type="checkbox"/> Author's Address Line 3	<input type="checkbox"/> Manuscript Number
<input type="checkbox"/> Author's Address Line 4	<input type="checkbox"/> Old PeopleID
<input type="checkbox"/> Author's Affiliation	<input type="checkbox"/> Online Publication Date
<input type="checkbox"/> Author's City	<input type="checkbox"/> ORCID
<input type="checkbox"/> Author's Country	<input type="checkbox"/> ORCID Authenticated
<input type="checkbox"/> Author's Department	<input type="checkbox"/> ORCID Imported as Authenticated
<input type="checkbox"/> Author's E-mail address	<input type="checkbox"/> Other Author Verification Status
<input type="checkbox"/> Author's First Name	<input type="checkbox"/> Other Author Verification Status Date
<input type="checkbox"/> Author's Institution	<input type="checkbox"/> People ID
<input type="checkbox"/> Author's ISO Country Code	<input type="checkbox"/> Personal Identifier ID
<input type="checkbox"/> Author's Last Name	<input type="checkbox"/> Post-Publication Corresponding Author
<input type="checkbox"/> Author's Middle Name	<input type="checkbox"/> Preprint DOI
<input type="checkbox"/> Author's Order	<input type="checkbox"/> Production Status
<input type="checkbox"/> Author's Position	<input type="checkbox"/> Publication Date
<input type="checkbox"/> Author's State/Province	<input type="checkbox"/> PubMed Author ID
<input type="checkbox"/> Author's Title	<input type="checkbox"/> ResearcherID
<input type="checkbox"/> Author's Zip/Postal Code	<input type="checkbox"/> Revision Independent Author ID
<input type="checkbox"/> Contributor Roles	<input type="checkbox"/> Revision Number
<input type="checkbox"/> Date Final Disposition Set	<input type="checkbox"/> Scopus Author ID
<input type="checkbox"/> Date Production Was Completed	<input type="checkbox"/> Section/Category ID Number
<input type="checkbox"/> Date Production Was Initiated	<input type="checkbox"/> Short Title
<input type="checkbox"/> Deceased Status	<input type="checkbox"/> Submission Created Using Short Interface
<input type="checkbox"/> Document Type ID	<input type="checkbox"/> Submission Number
<input type="checkbox"/> DOI	<input type="checkbox"/> Target Online Publication Date
<input type="checkbox"/> Editorial Status Date	<input type="checkbox"/> Unique Author ID
<input type="checkbox"/> Editorial Status ID	<input type="checkbox"/> Unique Document ID

(Other) Author Status Page



Points of Visibility:

- Author changes between versions
- Contributor Roles
- ORCID Information
- Institution and Affiliation
- Author Participation Confirmation
- Re-send verification letter
- Questionnaire Responses
- Author Details

(Other) Author Status Page

Manuscript > "Details" link > Details Page > Author Status:

Details for Manuscript Number: DEMOJES141-D-18-00046

Abstract Manuscript Notes Production Notes Editors Reviewers Alternate Reviewers

Corresponding Author: mary mary [Proxy]
North Andover, MA UNITED STATES [Proxy]

Corresponding Author E-Mail: jsnapke@ariessys.com

Discussion Forum: Initiate Discussion

Author Comments:

Other Authors: Jessica Reviewer
Adam Author
Astrid Author
Angela Author

All Authors: mary mary [Proxy]
Jessica Reviewer
Adam Author
Astrid Author
Angela Author

Author Status [Proxy]

Short Title:

Article Type: Original Study [Author List has been modified]

File Inventory: File Inventory

Section/Category:

Keywords:

Classifications: First Major Term; Second Major Term

Requested Editor:

Technical Check: Technical Check Information

Initial Date Submitted: May 23 2018 10:38AM

Editorial Status Date: May 23 2018 11:08AM

Current Editorial Status: Revised Manuscript Submitted

Last Revision Number: 1

Date Last Revision Submitted: May 23 2018 11:08AM

Submission Target Publication Date: (mm/dd/yyyy)

Author Details for Manuscript Number: DEMOJES141-D-18-00046

Close

[View Author Questionnaire Summary](#)

Corresponding Author Status

Order	Author Name	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	mary mary	jsnapke@ariessys.com				View Author Details

Other Author Status

Order	Author Name	Added in Revision	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Institution	Confirmed?	Options
2	Jessica Reviewer	R0	jsnapke@gmail.com Edit					Yes May 23 2018 10:53 AM	Reset Confirmation Status View Author Details View Questionnaire Responses
3	Adam Author <i>New</i>	R1-mary mary	aaauthor@ariestrash.com Edit					No Response	Resend Letter View Author Details Questionnaire Not Completed
4	Astrid Author <i>New</i>	R1-mary mary	astridauth@ariestrash.com Edit					No Response	Resend Letter View Author Details Questionnaire Not Completed
5	Angela Author <i>New</i>	R1-mary mary	angauth@ariestrash.com Edit					No Response	Resend Letter View Author Details Questionnaire Not Completed

To update the Co-Author's e-mail address that is associated with the submission, please click on the 'Edit' link. To save your changes please click on the 'Save' link.

To resend letters to all Other Authors with a status of 'No Response' and send letters requesting verification to Other Authors who have never been notified, click the 'Send Letters' button. To send an individual letter, please use the link next to that Author's name.

[Send Letters](#)

Removed Authors

Close

www.editorialmanager.com/demojes141/default.aspx

Editorial Manager™

HOME • LOGOUT • HELP • REGISTER • UPDATE MY MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT

Important Message: Site under dev

Quicklinks

Page: 1 of 1 (1 total)

Action

- View Submission Details
- Initiate Discussion
- Duplicate Submission Check (...)
- History
- Technical Check
- File Inventory
- Edit Submission
- Send Back to Author
- Classifications
- Set Final Disposition
- Initiate Production
- View Reviews and Comments
- Send E-mail
- Linked Submissions

Editor Details - Google Chrome

www.editorialmanager.com/demojes141/EMDetails.aspx?docid=88&ms_num=DEMO

Details for Manuscript

Abstract Manuscript Notes Production Notes Editor

Corresponding Author: mary mary [Proxy]
North Andover, MA UNITED STATES [Proxy]

Corresponding Author E-Mail: jsnapke@ariessys.com

Discussion Forum: Initiate Discussion

Author Comments:

Other Authors: Jessica E Reviewer, MSLIS, Sparrow Hospital| Victoria Scibilia, Sparrow Hospital| Michigan S Ainsley Author, Sparrow Hospital| Michigan S Astrid Author, Sparrow Hospital| Michigan S

All Authors: mary mary [Proxy] Jessica E Reviewer, MSLIS, Sparrow Hospital| Victoria Scibilia, Sparrow Hospital| Michigan S Ainsley Author, Sparrow Hospital| Michigan S Astrid Author, Sparrow Hospital| Michigan S

Short Title:

Article Type: Original Study Author List has been modified

File Inventory: File Inventory

Section/Category:

Keywords:

Classifications: First Major Term; Second Major Term

Requested Editor:

Technical Check: Technical Check Information

Initial Date Submitted: May 31 2018 02:06PM

Editorial Status Date: May 31 2018 02:13PM

Current Editorial Status: Revised Manuscript Submitted

Last Revision Number: 1

Date Last Revision Submitted: May 31 2018 02:13PM

Submission Target Publication Date: (mm/dd/yyyy)

Submission Target Volume:

Submission Target Issue:

Transmittal Form: Link to Transmittal Form

Author Days To Revise: 14

Final Disposition Term:

Corresponding Editor: Ellen Editor, Editor [Proxy]

Author Status - Google Chrome

www.editorialmanager.com/demojes141/ContributingAuthorStatus.aspx?docID=88&msid={0DFDA8E1-B30B-4B0D-9AAD-C0572E27BAC9}&revision=1

Author Details for Manuscript Number: DEMOJES141-D-18-00047

Manuscript

Close

View Author Questionnaire Summary

Corresponding Author Status

Order	Author Name	Contributor Roles	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	mary mary		jsnapke@ariessys.com				View Author Details

Other Author Status

Order	Author Name	Added in Revision	Contributor Roles	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Institution	Confirmed?	Options
2	Jessica E Reviewer	R0	Conceptualization (Lead) Data curation (Supporting)	jsnapke@gmail.com Edit		MSLIS	Sparrow Hospital	Michigan State University	Yes May 31 2018 2:08 PM	Reset Confirmation Status View Author Details View Questionnaire Responses
3	Victoria Scibilia	R0	Formal analysis (Lead) Funding acquisition (Equal)	vscibilia@ariessys.com Edit	0000-0002-4950-9989		Sparrow Hospital	Michigan State University	Yes May 31 2018 2:07 PM	Reset Confirmation Status View Author Details View Questionnaire Responses
4	Ainsley Author	R0	Investigation (Supporting) Methodology (Supporting)	ainsauth@ariestrash.com Edit			Sparrow Hospital	Michigan State University	No Response	Resend Letter View Author Details Questionnaire Not Completed
5	Astrid Author	R0	Project administration (Supporting) Resources (Supporting)	astridauth@ariestrash.com Edit			Sparrow Hospital	Michigan State University	No Response	Resend Letter View Author Details Questionnaire Not Completed

To update the Co-Author's e-mail address that is associated with the submission, please click on the 'Edit' link. To save your changes please click on the 'Save' link.

To resend letters to all Other Authors with a status of 'No Response' and send letters requesting verification to Other Authors who have never been notified, click the 'Send Letters' button. To send an individual letter, please use the link next to that Author's name.

Send Letters

Removed Authors

Author Name	Removed in Revision	Contributor Roles	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Institution	Confirmed?
Albert Author	R1-mary mary	Writing - original draft (Equal) Writing - review & editing (Equal) Writing - original draft Writing - review & editing	alauth@ariestrash.com			Sparrow Hospital	Michigan State University	No Response

Options Column

Options
Reset Confirmation Status
View Author Details
View Questionnaire Responses
Reset Confirmation Status
View Author Details
View Questionnaire Responses
Resend Letter
View Author Details
Questionnaire Not Completed
Resend Letter
View Author Details
Questionnaire Not Completed



- Reset Co-Author's status with the paper from "Confirmed" to "No Response"



- View the Co-Author's responses to Co-Author Questionnaire



- View the Co-Author's Details on one page – name, degrees, institution, affiliation, ORCID, contributor roles



- Resend the Co-Author verification letter



- Informs that the Co-Author Questionnaire has not been completed

Configurations

- To configure: PolicyManager > Define Details Page Layouts > Edit > “Select Items To Display” > Select “Other Authors (List Excluding Corresponding Author)” > Submit

The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with the 'em Editorial Manager' logo on the left and the user's role and username ('Role: Managing Editor Username: mary') on the right. Below the navigation bar, there are links for 'ROLEMANAGER', 'ACTIONMANAGER', 'POLICYMANAGER', 'ADMINMANAGER', and 'ADMINISTRATION HELP'. The main heading of the page is 'Select Items to Display for Alternate Editorial Details Page'. Below the heading, there is a sub-heading 'Select the information to appear on the Details page' and a note: '* Items marked with an asterisk are subject to additional permissions, which may mean that some users will not be able to view them until you give them the additional permission to do so in RoleManager.' There are two buttons, 'Expand All' and 'Collapse All', in the center. Below these buttons, there is a section titled 'Information Submitted by Author' with a list of items and checkboxes. The item 'Other Authors (List excluding Corresponding Author)' is circled in red. The list of items includes: Article Type (checked), Full Title (unchecked), Secondary Full Title (unchecked), Short Title (checked), Secondary Short Title (unchecked), First Author (unchecked), Corresponding Author (First, Middle and Last Name, Institute, City, State, and Country) (checked), Corresponding Author E-Mail (checked), Other Authors (List excluding Corresponding Author) (checked and circled), All Authors (List including Corresponding Author) (checked), All Authors Secondary Information (List including Corresponding Author) (unchecked), Funding Information (unchecked), and Abstract (checked).

em Editorial Manager™

Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Select Items to Display for Alternate Editorial Details Page

Select the information to appear on the Details page

* Items marked with an asterisk are subject to additional permissions, which may mean that some users will not be able to view them until you give them the additional permission to do so in RoleManager.

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

Information Submitted by Author

- Article Type
- Full Title
- Secondary Full Title
- Short Title
- Secondary Short Title
- First Author
- Corresponding Author (First, Middle and Last Name, Institute, City, State, and Country)
- Corresponding Author E-Mail
- Other Authors (List excluding Corresponding Author)
- All Authors (List including Corresponding Author)
- All Authors Secondary Information (List including Corresponding Author)
- Funding Information
- Abstract

Institution AND Affiliation

- New feature in 14.1
 - Institution can now be displayed on Author Details Page
 - Previously only Affiliation was displayed
- New feature in 15.0 (or early adopters in 14.1)
 - Affiliation metadata is now extracted
- That's great! What's the difference?
 - In terms of EM:
 - Institution: Author's PRIMARY organization – single field dropdown (populated with RingGold institution list)
 - Affiliation: Author's OTHER organization(s) – text box for multiple entries



Author Questionnaire

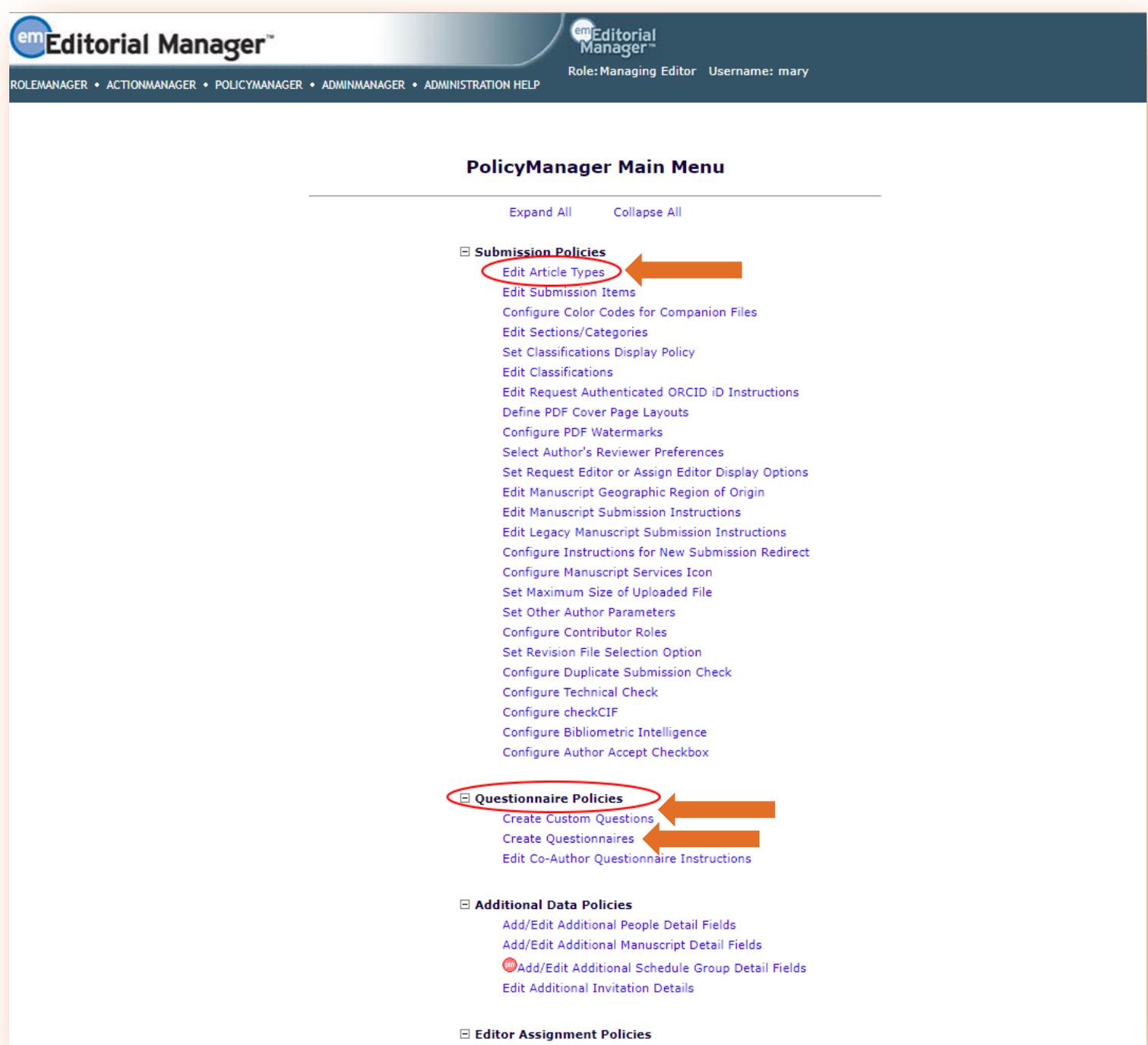
- Way to capture information you from Co-Authors that you may not want/need from Corresponding Authors
- Responses travel with the MS just like Submission Questionnaire responses
- Can be Required or Optional



Configurations

Identical process as
Submission Questions/
Questionnaires:

1. Create Question in Question Pool
2. Add to a Questionnaire
3. Tie Questionnaire to an Article Type



The screenshot shows the Editorial Manager interface. At the top, the logo 'em Editorial Manager™' is visible on the left, and the user's role 'Role: Managing Editor' and username 'Username: mary' are on the right. Below the header is a navigation bar with links: 'ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP'. The main content area is titled 'PolicyManager Main Menu'. It features two buttons: 'Expand All' and 'Collapse All'. The menu is organized into several sections, each with a square icon and a title. The 'Submission Policies' section is expanded, and its title is circled in red. An orange arrow points to the 'Edit Article Types' option within this section. The 'Questionnaire Policies' section is also expanded, with its title circled in red. Two orange arrows point to the 'Create Custom Questions' and 'Create Questionnaires' options. The 'Additional Data Policies' section is partially visible, showing options like 'Add/Edit Additional People Detail Fields' and 'Add/Edit Additional Manuscript Detail Fields'. The 'Editor Assignment Policies' section is also visible at the bottom.

PolicyManager Main Menu

Expand All Collapse All

- [-] **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
 - Configure Duplicate Submission Check
 - Configure Technical Check
 - Configure checkCIF
 - Configure Bibliometric Intelligence
 - Configure Author Accept Checkbox
- [-] **Questionnaire Policies**
 - Create Custom Questions
 - Create Questionnaires
 - Edit Co-Author Questionnaire Instructions
- [-] **Additional Data Policies**
 - Add/Edit Additional People Detail Fields
 - Add/Edit Additional Manuscript Detail Fields
 - Add/Edit Additional Schedule Group Detail Fields
 - Edit Additional Invitation Details
- [-] **Editor Assignment Policies**

1. Create Question in Question Pool/Library

- System Admin Functions > PolicyManager > Questionnaire Policies > Create Custom Questions > Add Question button

em Editorial Manager™

Role: Managing Editor Username: mary

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Listed below are the customized questions which may be displayed as part of a

[Add Question](#)

Actions	Description
Edit Copy Hide	Please confirm you have approval from all Co-authors to submit this
Edit Copy Hide	If you have submitted this manuscript to another publication please
Edit Copy Hide	Please enter the date you submitted the paper to another publica
Edit Copy Hide	Please enter the Word Count of your manuscript
Edit Copy Hide	§ Open Science Badges: Are you interested in applying for one or more of the following Op Data Badge, [2] Open Materials Badge, or [3] Preregistration Badge
Edit Copy	Are you a "Society A" member?

Add Custom Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented as part of submission, author verification or production task completion.

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

[Cancel](#) [Save and Close](#) [Save and Add Another Question](#) [Insert Special Characters](#)

Question text:
Are there other relationships or activities that readers could perceive to have influenced, or that give the appearance of potentially influencing, what you wrote in the submitted work?

Instructions for Author Response:

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: **Maximum Field Length (1-200):**

Default Value	Value	Flag
<input checked="" type="radio"/>	None	Associate with Flag
<input type="radio"/>	<input type="text"/>	Associate with Flag

[Insert Special Characters](#)

2. Add Question to Questionnaire

- System Admin Functions > PolicyManager > Questionnaire Policies > Create Questionnaire > Either edit existing or create new > Add Custom Questions

em Editorial Manager™
Role: Managing Editor Username: mary

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Create Questionnaire

Create a new Questionnaire by clicking the 'Add' button below.
Questionnaires displayed here may be configured for use with Article Types or Production Tasks.

Author Questionnaire	Remove	Edit
Sample Questionnaire	Remove	Edit

Add

em Editorial Manager™
Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Configure Questionnaire

Questionnaire Name: (50 characters maximum)

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

Question Display Order:
No Custom Questions have been added.

Order	Question	Custom Metadata ID	Required	Include in Merge Field	Actions
-------	----------	--------------------	----------	------------------------	---------

Add Custom Questions

Cancel **Save**

2. Add Question to Questionnaire

Configure Questionnaire

Enter a name for the Questionnaire in the 'Questionnaire Name' field. Custom Questions may be added to the Questionnaire by clicking the 'Add Custom Questions' button, selecting Custom Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save the Questionnaire and return to the Create Questionnaire page. Click the 'Remove' link to remove questions from the questionnaire.

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

The %AUTHOR_QUESTIONNAIRE_SUBSET% merge field pulls in all of the selected Questions and Responses for all Authors on the submission (including the Corresponding Author). To specify questions/responses for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all questions you want to include. Note the %AUTHOR_QUESTIONNAIRE% merge field continues to pull in all questions and responses for the questionnaire.

Questionnaire Name: (50 characters maximum)

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

Question Display Order:

Order	Question	Custom Metadata ID	Required	Include in Merge Field	Actions
1	§ Are there other relationships or activities that readers could perceive to have influenced, or that give the appearance of potentially influencing, what you wrote in the submitted work?		<input type="checkbox"/>	<input type="checkbox"/>	Remove

Select Custom Q

Custom Questions available for use in a Questionnaire are displayed below. Select the Custom Questions you wish to add, and click the 'Add to Questionnaire' button to add them to the Questionnaire. Questions displayed in gray text have already been added to the Questionnaire and cannot be selected again. For multi-part questions, only the Custom Metadata ID associated with the Initial Question is displayed.

Custom Questions:

Select Description

- Please confirm you have approval from all Co-authors to submit this manuscript?
- If you have submitted this manuscript to another publication please give details below
- Please enter the date you submitted the paper to another publication.
- Please enter the **Word Count** of your manuscript
- § **Open Science Badges:**

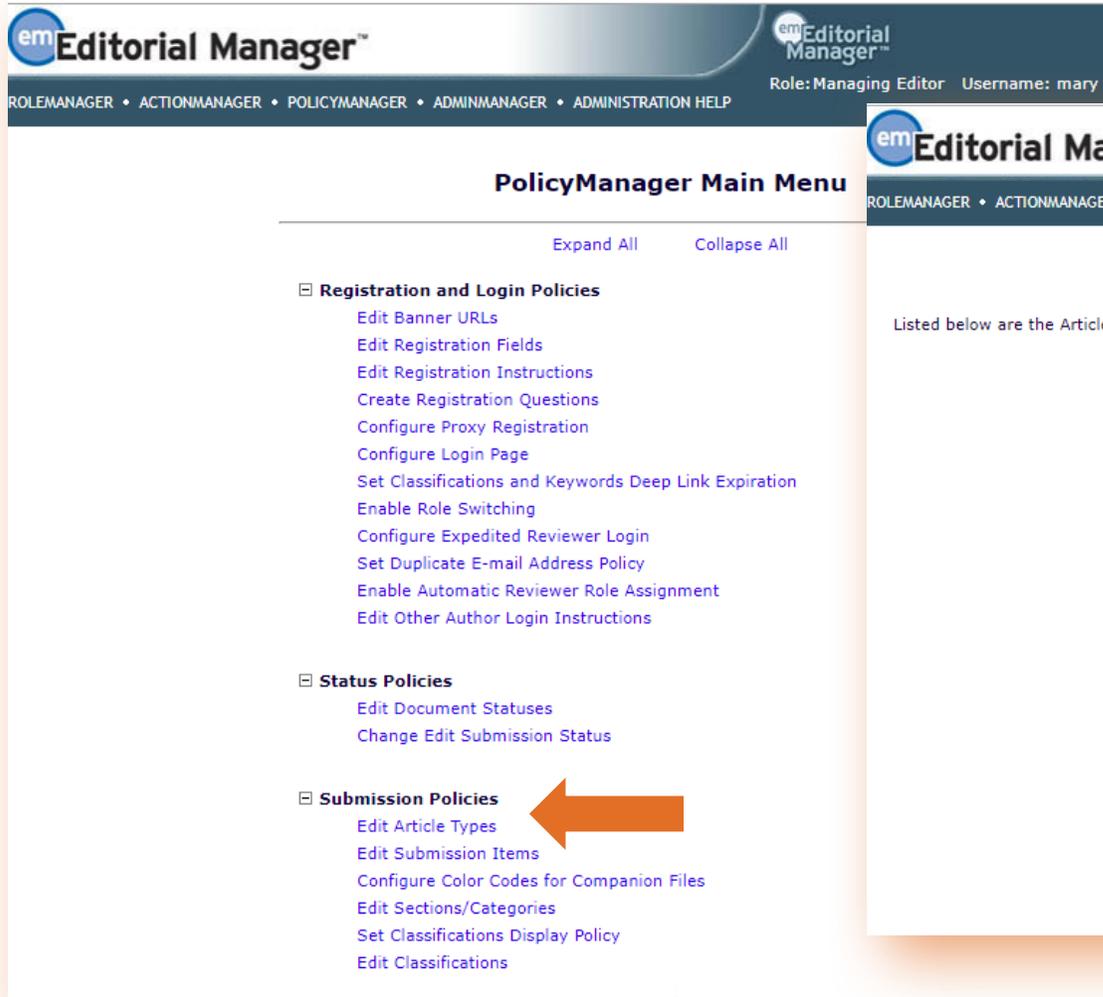
Are you interested in applying for one or more of the following Open Science Badges, to be awarded at the time of acceptance and displayed within your article? [1] Open Data Badge, [2] Open Materials Badge, or [3] Preregistration Badge

Please click [here](#) for more information.

- Are you a "Society A" member?
- Are you a "Society B" member?
- § Do you or your institution receive payments or services from a third party for any aspect of this work?
- § Are there other relationships or activities that readers could perceive to have influenced, or that give the appearance of potentially influencing, what you wrote in the submitted work?

3. Tie Questionnaire to an Article Type

- System Admin Functions > PolicyManager > Edit Article Types > Edit existing, copy existing, or create new > Article Type Parameters > ...



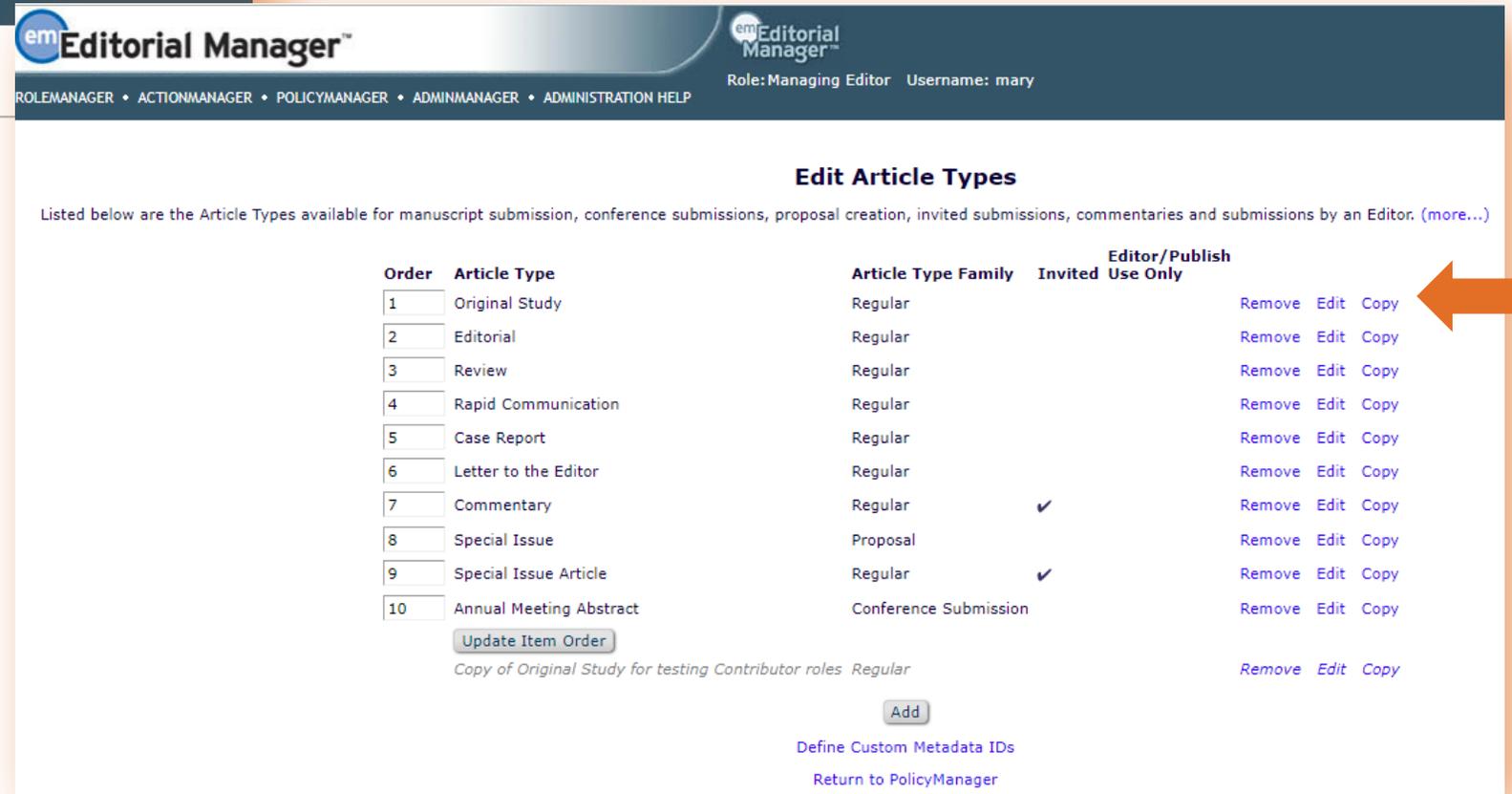
em Editorial Manager™
Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

PolicyManager Main Menu

Expand All Collapse All

- Registration and Login Policies
 - Edit Banner URLs
 - Edit Registration Fields
 - Edit Registration Instructions
 - Create Registration Questions
 - Configure Proxy Registration
 - Configure Login Page
 - Set Classifications and Keywords Deep Link Expiration
 - Enable Role Switching
 - Configure Expedited Reviewer Login
 - Set Duplicate E-mail Address Policy
 - Enable Automatic Reviewer Role Assignment
 - Edit Other Author Login Instructions
- Status Policies
 - Edit Document Statuses
 - Change Edit Submission Status
- Submission Policies
 - Edit Article Types
 - Edit Submission Items
 - Configure Color Codes for Companion Files
 - Edit Sections/Categories
 - Set Classifications Display Policy
 - Edit Classifications



em Editorial Manager™
Role: Managing Editor Username: mary

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Edit Article Types

Listed below are the Article Types available for manuscript submission, conference submissions, proposal creation, invited submissions, commentaries and submissions by an Editor. (more...)

Order	Article Type	Article Type Family	Editor/Publish Use Only		
			Invited	Remove	Edit Copy
1	Original Study	Regular		Remove	Edit Copy
2	Editorial	Regular		Remove	Edit Copy
3	Review	Regular		Remove	Edit Copy
4	Rapid Communication	Regular		Remove	Edit Copy
5	Case Report	Regular		Remove	Edit Copy
6	Letter to the Editor	Regular		Remove	Edit Copy
7	Commentary	Regular	✓	Remove	Edit Copy
8	Special Issue	Proposal		Remove	Edit Copy
9	Special Issue Article	Regular	✓	Remove	Edit Copy
10	Annual Meeting Abstract	Conference Submission		Remove	Edit Copy

Copy of Original Study for testing Contributor roles Regular Remove Edit Copy

Define Custom Metadata IDs
Return to PolicyManager

3. Tie Questionnaire to an Article Type

- Designate Author Questionnaire > Select Questionnaire from Dropdown

The screenshot shows the Editorial Manager interface for configuring Article Type Parameters. The page header includes the Editorial Manager logo, navigation links (ROLEMANAGER, ACTIONMANAGER, POLICYMANAGER, ADMINMANAGER, ADMINISTRATION HELP), and user information (Role: Managing Editor, Username: mary). The main content area is titled "Article Type Parameters" and is organized into two columns: "New Submission" and "Revised Submission". Each column contains a series of dropdown menus for various parameters. An orange arrow points to the "Designate Author Questionnaire" dropdown in the "New Submission" column, which is currently open, showing options: "Sample Questionnaire", "Author Questionnaire", "Hidden", "Author Questionnaire", "Sample Questionnaire", and "Co-Author Questionnaire". The "Author Questionnaire" option is highlighted in blue. To the right of the "Revised Submission" column, there is a note: "You may set Minimum and/or Maximum limits for the 'Number of Classifications' under Field Size Limitations below." At the bottom right, another note states: "You must configure an email address to receive waiver requests on the 'Configure Waiver Request' page in PolicyManager."

Parameter	New Submission	Revised Submission
Set Secondary "Full Title" Preferences:	Optional	Optional
Set "Short Title" Preferences:	Optional	Optional
Set Secondary "Short Title" Preferences:	Hidden	Hidden
Set "Funding Information" Preferences:	Hidden	Hidden
Set "Select Section/Category" Preferences:	Optional	Optional
Set "Submit Abstract" Preferences:	Required	Optional
Set Secondary "Submit Abstract" Preferences:	Hidden	Hidden
Set "Enter Keywords" Preferences:	Optional	Optional
Set "Enter Secondary Keywords" Preferences:	Hidden	Hidden
Set "Select Classifications" Preferences:	Required	Optional
Set "Additional Information" Preferences:		
Designate Submission Questionnaire:	Sample Questionnaire	Hidden
Designate Author Questionnaire:	Author Questionnaire	Hidden
Set "Enter Comments" Preferences:		Hidden
Set "Suggest Reviewers" Preferences:		Display
Set "Oppose Reviewers" Preferences:		Display
Set "Respond to Reviewers" Preferences:	Hidden	Optional
Set "Request Editor" Preferences:	Hidden	Hidden
Set "Select Region of Origin" Preferences:	Optional	Optional
Set "Waiver Request" Preferences:	Hidden	Hidden

Co-Author Questionnaire

em Editorial Manager™

HOME • LOGIN • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Not logged in.

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

Insert Special Character

Warning! You must submit this page to verify your contribution to the submission.

Print

Verify Contributing Authorship

If you are unable to complete your responses at this time, please click on the "Save for Later" button to save your work. To return to this page later, click on the Verify deep link in the email that you were sent regarding this submission, or save the following URL and enter it in your browser's address bar.

<http://www.editorialmanager.com/demojes141/l.asp?i=438&l=RQQLXUQE>

Please respond to the questions/statements below and click on the "Submit to Publication" button to complete your Co-Author verification for the submission.

If you do not submit your responses, your contribution will not be confirmed. If you click on the "Save for Later" button, your contributing authorship will not be confirmed, but you can return to this page later to complete your responses.

Are there other relationships or activities that readers could perceive to have influenced, or that give the appearance of potentially influencing, what you wrote in the submitted work?

Please select a response
 Yes
 No

Please detail the influence:

Character Count: 14
Other research|

Limit 20000 characters

Save for Later Submit to Publication

- Co-Author Questionnaire from Co-Author verification email deep link

Other Author Notifications



- EM allows Co-Authors to be automatically copied on Decision Letters or gives the Editor the option to copy all Co-Authors (on a per-letter basis)
- Configure letters to come from the Corresponding Author (rather than Editor)

Other Author Notifications

- EM allows Co-Authors to be automatically copied on Decision Letters or gives the Editor the option to copy all Co-Authors (on a per-letter basis)

Co-Author automatically copied:

The screenshot displays the Editorial Manager interface. On the left, a 'Notify Author Confirmation' box contains the text: 'The Author Notification Letter 'Your Submission' has been e-mailed to: mary mary jsnapke@ariessys.com'. Below this, a green arrow points to the email address. The main content area shows an email preview for 'Your Submission' sent on Mon 6/4/2018 3:57 PM. The email is from 'em.demojes141.0.5bad02.794d1ca7@editorialmanager.com on behalf of The Journal <em@editorialmanager.com>' to 'Jessica Snapke'. The 'Action Items' section lists the CC recipients: 'jsnapke@gmail.com, vscibilia@ariessys.com, ainsauth@ariestrash.com, astridauth@ariestrash.com', with a green arrow pointing to this list. The email body includes a reference number 'Ms. No. DEMOJES141-D-18-00047R1', a greeting 'Dear mary,', and a message from the Managing Editor stating that reviewers have commented and a revision is required by Jun 18 2018 11:59PM. The email concludes with 'Yours sincerely' and the signature 'mary mary, Managing Editor, JES Demo 14.1'.

Notify Author Confirmation

The Author Notification Letter 'Your Submission' has been e-mailed to:
mary mary jsnapke@ariessys.com

cc: Jessica E Reviewer
cc: Victoria Scibilia
cc: Ainsley Author
cc: Astrid Author

[Return to All Submissions with Editor's Decision](#)
[Return to Main Menu](#)

Mon 6/4/2018 3:57 PM
em.demojes141.0.5bad02.794d1ca7@editorialmanager.com on behalf of The Journal <em@editorialmanager.com>
Your Submission

To: Jessica Snapke

Action Items + Get more apps

CC: jsnapke@gmail.com, vscibilia@ariessys.com, ainsauth@ariestrash.com, astridauth@ariestrash.com

Ref.: Ms. No. DEMOJES141-D-18-00047R1
Manuscript
JES Demo 14.1

Dear mary,

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

For your guidance, reviewers' comments are appended below.

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

Your revision is due by Jun 18 2018 11:59PM.

To submit a revision, go to <https://demojes141.editorialmanager.com/> and log in as an Author. You will see a menu item call Submission Needing Revision. You will find your submission record there.

Yours sincerely

mary mary
Managing Editor
JES Demo 14.1

Reviewers' comments:

Other Author Notifications

- EM allows Co-Authors to be automatically copied on Decision Letters or gives the Editor the option to copy all Co-Authors (on a per-letter basis)

Editor has the option to copy all Co-Authors:

em Editorial Manager™

HOME • LOGOUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Go to: -- Search Page --
Role: Managing Editor Username: mary

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

Notify Author

Manuscript Number:
DEMOJES141-D-18-00047R2

Title: Manuscript

To notify the author of the Final Editor's Decision, use the 'Send Now' button.

If permitted, you may reject this decision and send the assignment back to the previous Editor, by using the Return to (Editor) link.

Date Revision Due: 06/18/2018 (mm/dd/yyyy)

Editor Decision: Revise

Modify Decision: Revise

Rescind Decision: [Return to Editor](#)

From: The Journal <trash1@ariessc.com>

To: mary mary

Letter Purpose: Editor Decision - Revise

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

Ellen Editor (Editor)

All Co-Authors with known e-mail addresses

cc: _____

bcc: _____

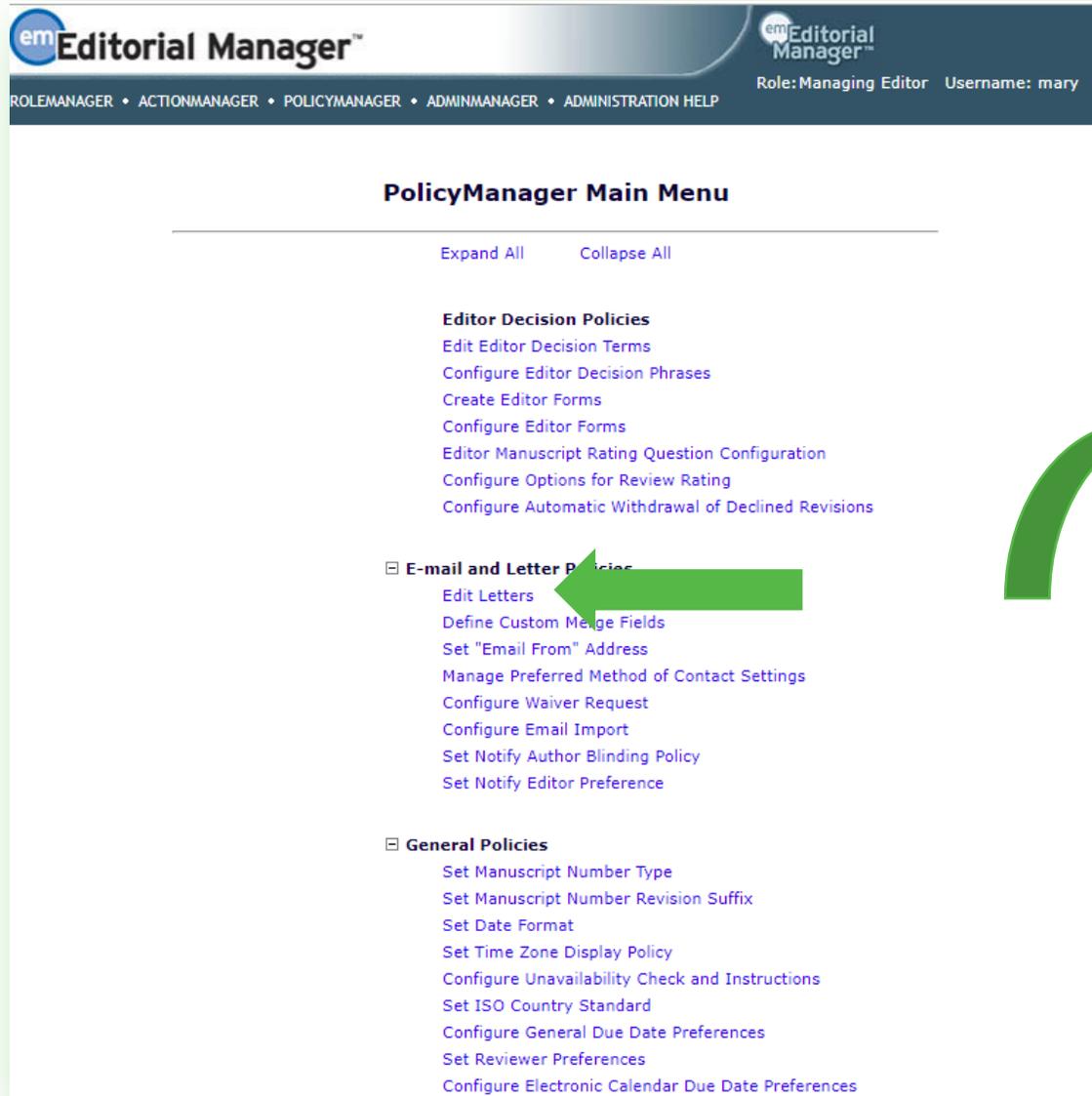
Letter Body: [Insert Special Character](#) [Open in New Window](#)

Ref.: Ms. No. DEMOJES141-D-18-00047R2
Manuscript
JES Demo 14.1

Dear %TITLE% %LAST_NAME%,

Other Author Notifications – Configuration

- System Admin Functions > PolicyManager > Edit Letters > Locate and Edit Decision Letters



em Editorial Manager™

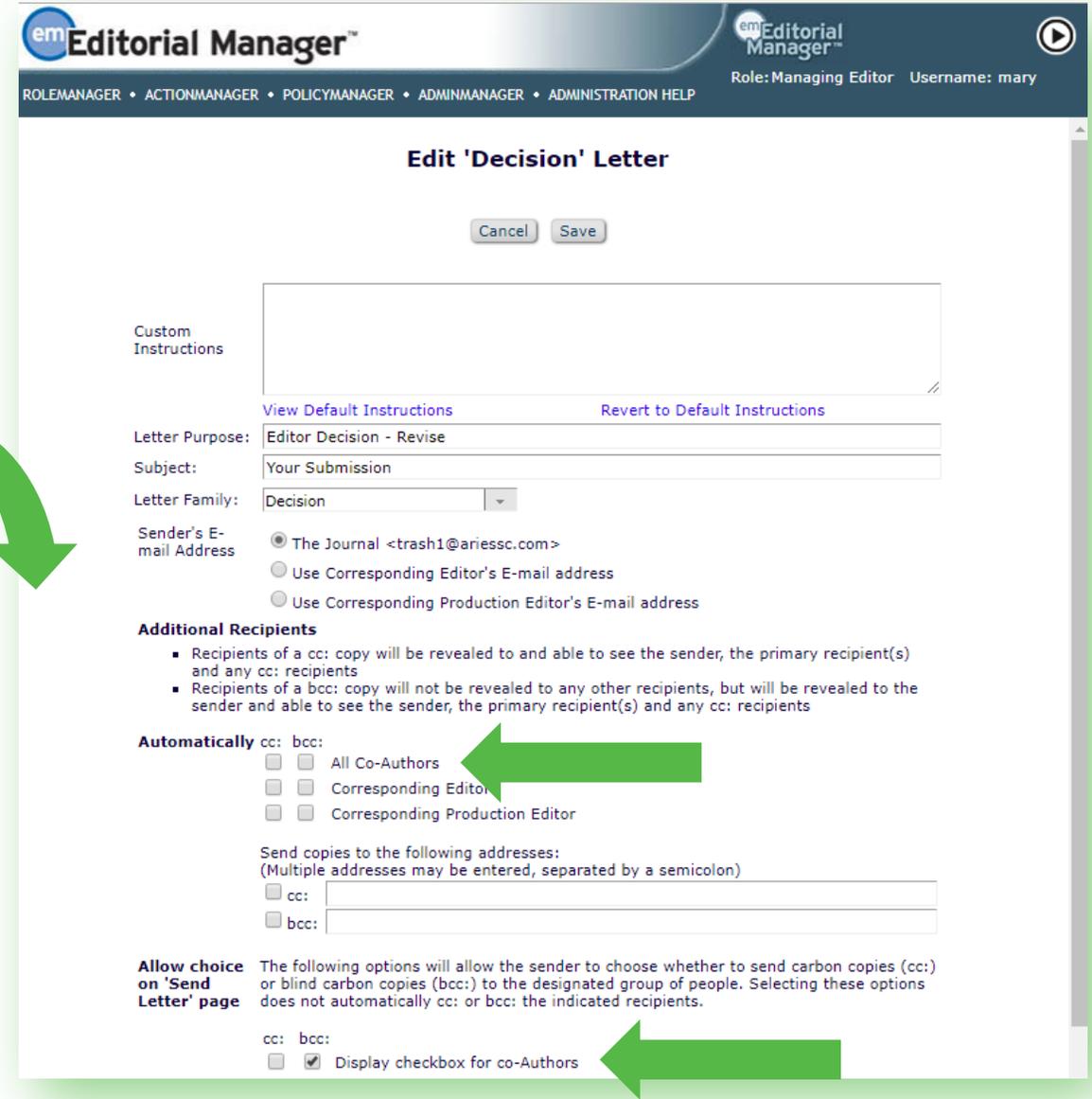
Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

PolicyManager Main Menu

Expand All Collapse All

- Editor Decision Policies**
 - Edit Editor Decision Terms
 - Configure Editor Decision Phrases
 - Create Editor Forms
 - Configure Editor Forms
 - Editor Manuscript Rating Question Configuration
 - Configure Options for Review Rating
 - Configure Automatic Withdrawal of Declined Revisions
- 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
- General Policies**
 - Set Manuscript Number Type
 - Set Manuscript Number Revision Suffix
 - Set Date Format
 - Set Time Zone Display Policy
 - Configure Unavailability Check and Instructions
 - Set ISO Country Standard
 - Configure General Due Date Preferences
 - Set Reviewer Preferences
 - Configure Electronic Calendar Due Date Preferences



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Role: Managing Editor Username: mary

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Edit 'Decision' Letter

Cancel Save

Custom Instructions

[View Default Instructions](#) [Revert to Default Instructions](#)

Letter Purpose: Editor Decision - Revise

Subject: Your Submission

Letter Family: Decision

Sender's E-mail Address

- The Journal <trash1@ariessc.com>
- Use Corresponding Editor's E-mail address
- Use Corresponding Production Editor's E-mail address

Additional Recipients

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

Automatically cc: bcc:

- All Co-Authors
- Corresponding Editor
- Corresponding Production Editor

Send copies to the following addresses:
(Multiple addresses may be entered, separated by a semicolon)

cc:

bcc:

Allow choice on 'Send Letter' page

The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:

- Display checkbox for co-Authors

Other Author Notifications

- Configure Other Author Notification Letters to come from the Corresponding Author (rather than Editor)
 - Bounced letters go to Corresponding Author to communicate with Co-Authors

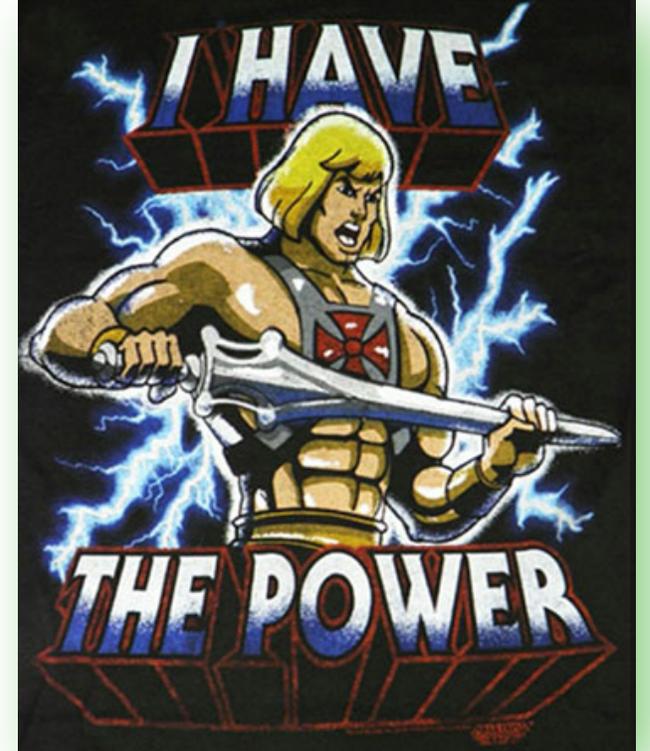


The screenshot shows the Editorial Manager interface for adding a 'Co-Author Communications' letter. The page title is 'Add 'Co-Author Communications' Letter'. Below the title is a paragraph of instructions: 'Please type (or paste) a text-formatted letter into the Letter Body box below. This default letter should not include HTML tags. To incorporate HTML tags, click 'Save' on this page to save the text-formatted letter and then select the 'HTML format' radio button from the 'Edit Letters' page and click the Edit link. HTML tags may then be added.' There are 'Cancel' and 'Save' buttons. Below this is a large text area for the letter body with instructions: 'Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.' There are links for 'View Default Instructions' and 'Revert to Default Instructions'. Below the text area are form fields for 'Letter Purpose:' (Co-Author Notification), 'Subject:' (Hello Co-Author), and 'Letter Family:' (Co-Author Communications). At the bottom, there are radio buttons for 'Sender's E-mail Address': 'The Journal <trash1@ariessc.com>' (selected), 'Use Corresponding Author's E-mail Address', 'Use Corresponding Editor's E-mail address', and 'Use Corresponding Production Editor's E-mail address'. Two green arrows point to the 'Letter Family' dropdown and the 'Use Corresponding Author's E-mail Address' radio button.

- Configuration: System Admin Functions > PolicyManager > Edit Letters > Edit existing/Create New Letter > Select “Co-Author Communication” Letter Family

Speaking of Corresponding Author permissions...

- EM allows the Editorial Office to give the Corresponding Author the power to manage what the Co-Authors can see and do
- This lifts the burden a bit for the Editorial Office/Staff



Speaking of Corresponding Author permissions...

em Editorial Manager™

em Editorial Manager™

Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Edit Role Definition

Role Name: Author

Check the functions that this role is permitted to perform.

- View Status Date
- View Current Status
- View Other Author Status
 - Manage Other Authors
 - Edit Other Author E-mail Address
- Allow Access to Reviewer Names and Reviews:
 - After Final Decision of Accept, Reject or Reject and Transfer
 - After First Decision
- Send Ad Hoc E-mail
- View Author Related Correspondence History
- View checkCIF Results
- View Bibliometric Intelligence Results

Transmittal Policies



- Yet another point of visibility:
Co-Author Metadata on MS
Transmittal Form

Transmittal Policies

- Transmittal Form:

Submission Metadata

Include metadata in release to production

Item Description	Value	
Manuscript Number	DEMOJES141-D-18-00050	Help
Revision Number	0	Help
Article Title	Authors, Co-Authors!	Help
Article Type	Original Study	Help
Initial Date Submitted	Jun 11 2018 1:50PM	Help
Date Revision Submitted		Help
Keyword		Help
Classification Description	First Major Term; Second Major Term;	Help
Section/Category Name		Help
All Authors	mary mary; Jessica Author; Ainsley Author; Aaron Author	Help
First Author First Name	mary	Help
First Author Middle Name		Help
First Author Last Name	mary	Help
First Author Degree		Help
Co-Author: Title		Help
Co-Author: First Name	Jessica	Help
Co-Author: Last Name	Author	Help
Co-Author: E-mail Address	jsnapke@gmail.com	Help
Co-Author: Institution	Michigan State University	Help
Co-Author: Author's Affiliation	Sparrow Hospital	Help
Co-Author: ORCID		Help
Co-Author: Contributor Information		Help
Co-Author: Equal Contribution Status		Help
Co-Author: Title		Help
Co-Author: First Name	Ainsley	Help
Co-Author: Last Name	Author	Help
Co-Author: E-mail Address	ainsauth@ariestrash.com	Help
Co-Author: Institution	Michigan State University	Help
Co-Author: Author's Affiliation	Sparrow Hospital	Help
Co-Author: ORCID		Help

Transmittal Policies – Configuration

- System Admin Functions > PolicyManager > “Transmittal Policies” section > Select Co-Author Metadata Fields > Edit Transmittal Form Layout (to order where metadata appears on form)

The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with the 'em Editorial Manager' logo on the left and a user profile 'Role: Managing Editor Username: mary' on the right. Below the navigation bar, a breadcrumb trail reads 'ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP'. The main heading is 'Select Co-Author Metadata Fields'. Below the heading are 'Cancel' and 'Save' buttons. A paragraph of text explains the purpose of the form: 'The following form contains the metadata information that Editorial Manager stores for the Co-Authors. Please select the information you would like transmitted to the production system. If a field is checked, it has been previously selected by your journal. If the field you are looking for is not in the list below, click the following link to [Add Author Metadata Fields](#).' Below this text are 'Check All' and 'Clear All' links. The main content is a table with three columns: 'Select Field', 'Field Name', and 'Help'. The table lists 15 metadata fields with checkboxes and help links.

Select Field	Field Name	Help
<input type="checkbox"/>	Co-Author: People Unique ID	Help
<input type="checkbox"/>	Co-Author: Author's Order	Help
<input checked="" type="checkbox"/>	Co-Author: Title	Help
<input checked="" type="checkbox"/>	Co-Author: First Name	Help
<input type="checkbox"/>	Co-Author: Middle Name	Help
<input checked="" type="checkbox"/>	Co-Author: Last Name	Help
<input type="checkbox"/>	Co-Author: Degree	Help
<input type="checkbox"/>	Co-Author: Nickname	Help
<input checked="" type="checkbox"/>	Co-Author: E-mail Address	Help
<input type="checkbox"/>	Co-Author: Position	Help
<input checked="" type="checkbox"/>	Co-Author: Institution	Help
<input type="checkbox"/>	Co-Author: Department	Help
<input checked="" type="checkbox"/>	Co-Author: Author's Affiliation	Help
<input type="checkbox"/>	Co-Author: Address Line 1	Help

ORCID Solicitation from Co-Authors:

Two ways to solicit ORCID^s from your Co-Authors:

1. During verification
2. “Fetch” functionality



1. Solicit ORCID during Co-Author Verification

- Co-Author Verification (after clicking deep link from letter):

em Editorial Manager™

HOME • LOGIN • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Not logged in.

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

[Insert Special Character](#)

Warning! You must submit this page to verify your contribution to the submission.

[Print](#)

Verify Contributing Authorship

If you are unable to complete your responses at this time, please click on the "Save for Later" button to save your work. To return to this page later, click on the Verify deep link in the email that you were sent regarding this submission, or save the following URL and enter it in your browser's address bar.

<http://www.editorialmanager.com/demojes141/l.asp?i=461&l=7HQ5YUWB>

This publication requests that Authors link to their ORCID record to retrieve an 'Authenticated' ORCID Identifier. This will support the correct attribution of this submission to you if accepted for publication. If you have not yet registered for an ORCID ID, you can also use the button below to register and authenticate a new one.

ORCID ID: (None)

[Link to ORCID Record](#) [What is ORCID?](#)

Please respond to the questions/statements below and click on the "Submit to Publication" button to complete your Co-Author verification for the submission.

If you do not submit your responses, your contribution will not be confirmed. If you click on the "Save for Later" button, your contributing authorship will not be confirmed, but you can return to this page later to complete your responses.

Are there other relationships or activities that readers could perceive to have influenced, or that give the appearance of potentially influencing, what you wrote in the submitted work?

Please select a response
 Yes
 No

[Save for Later](#) [Submit to Publication](#)

1. Solicit ORCID during Co-Author Verification - Configuration

- System Admin Functions > PolicyManager > Edit Article Types > Edit Existing/Add New > “Co-Author Parameters” section > Authenticated ORCID iD Request Dropdown

Co-Author Parameters

Register/Verify Other Authors

Co-Authors verify on new submission

Authenticated ORCID ID Request: 

Display Author Questionnaire to Co-Authors

This asks the author to retrieve their ORCID using a secure Authentication mechanism during Co-Author Verification.
Select this box to require Co-Authors to respond to the Author Questionnaire in order to confirm contributing authorship.

2. Solicit ORCID via “Fetch” during Submission

- Corresponding Author clicks “Fetch” when entering Co-Authors during the Submission process:

Enter Author Details

Given/First Name* Victoria
Middle Name
Family/Last Name* Scibilia
Academic Degree(s)
Affiliation
E-mail Address* vscibilia@ariessys.com
ORCID [Fetch](#)
[What is ORCID?](#)

ORCID Search

This page lists public ORCID identifiers which match the information entered above.

Click on Select to retrieve the ORCID identifier from that profile. Click on the identifier to view that profile on the ORCID site.

Start a new search by typing a name, institution, email address or any personal identifier into the supplied field and clicking Search.

[Go to the ORCID web site](#)

	Given Name	Family Name	Other Names	Institutions	ORCID
Select	Victoria	Scibilia			0000-0002-4950-9989

Showing Results 1-1 Display 10 results per page.

Close

2. "Fetch"- Configuration

- System Admin Functions > PolicyManager > Set Other Author Parameters > Edit Existing/Add New > "Co-Author Parameters" section > Authenticated ORCID iD Request Dropdown

em Editorial Manager™

Role: Managing Editor Username:

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Set Other Author Parameters

You may request additional information about Other Authors entered on the **Add/Edit/Remove Authors** manuscript submission step. Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'. If your Publication chooses to require Other Author verification or registration for any Article Type, you may want to select E-mail or other address fields as required for all Other Authors so that you will have a means of contacting Other Authors. ([more...](#))

Other Author Parameters		Include in Merge Field?
Set "Title" Text Entry Box Preference:	Hidden ▾	<input type="checkbox"/>
Given/First Name	Required	<input type="checkbox"/>
Set "Secondary Given/First Name" Text Entry Box Preference:	Hidden ▾	<input type="checkbox"/>
Set "Middle Name" Text Entry Box Preference:	Optional ▾	<input type="checkbox"/>
Family/Last Name	Required	<input type="checkbox"/>
Set "Secondary Family/Last Name" Text Entry Box Preference:	Hidden ▾	<input type="checkbox"/>
Set "Academic Degree(s)" Text Entry Box Preference:	Optional ▾	<input type="checkbox"/>
Set "Secondary Academic Degree(s)" Text Entry Box Preference:	Hidden ▾	<input type="checkbox"/>
Set "Affiliation" Text Entry Box Preference:	Optional ▾	<input type="checkbox"/>
Set "E-mail Address" Text Entry Box Preference:	Required ▾	<input type="checkbox"/>
<input checked="" type="checkbox"/> Require unique e-mail addresses for all authors of a submission		
Set "ISNI" Text Entry Box Preference:	Hidden ▾	<input type="checkbox"/>
Set "ORCID" Text Entry Box Preference:	Optional ▾	<input type="checkbox"/>

CRediT

What is CRediT?

- “CRediT is high-level taxonomy, including 14 roles, that can be used to represent the roles typically played by contributors to scientific scholarly output. The roles describe each contributor’s specific contribution to the scholarly output.” – <http://www.casrai.com/credit>
- Casrai partnered with Aries in 2016 to integrate CRediT into EM
- Viewed previously on MS Submission Steps and Author Details pages



CRedit - Configurations

- System Admin Functions > PolicyManager > Set Other Author Parameters > “Set ‘Contributor Roles’ Preference” > Set to “Display” **AND;** > Configure Contributor Roles (next to each other under “Submission Policies” section)



The screenshot shows the Editorial Manager interface. At the top, the "em Editorial Manager" logo is visible on the left, and the user's role, "Role: Managing Editor", is shown on the right. Below the logo, a navigation bar contains links for "ROLEMANAGER", "ACTIONMANAGER", "POLICYMANAGER", "ADMINMANAGER", and "ADMINISTRATION HELP". The main content area is titled "PolicyManager Main Menu" and includes "Expand All" and "Collapse All" options. A list of configuration options is displayed under the "Submission Policies" section. Two green arrows point to the "Set Other Author Parameters" and "Configure Contributor Roles" items in the list.

em Editorial Manager™

Role: Managing Editor

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

PolicyManager Main Menu

Expand All Collapse All

☐ 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
- Configure Duplicate Submission Check
- Configure Technical Check
- Configure checkCIF

CRediT - Configurations

Set Other Author Parameters:

em Editorial Manager™
Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Set Other Author Parameters

You may request additional information about Other Authors entered on the **Add/Edit/Remove Authors** manuscript submission step. Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'. If your Publication chooses to require Other Author verification or registration for any Article Type, you may want to select E-mail or other address fields as required for all Other Authors so that you will have a means of contacting Other Authors. ([more...](#))

Other Author Parameters	Include in Merge Field?
Set "Secondary Position" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Institution" Text Entry Box Preference:	Optional <input type="checkbox"/>
Set "Department" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Secondary Institution" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Secondary Department" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Street Address" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "City" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "State" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Secondary Street Address" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Secondary City" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Secondary State" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Zip or Postal Code" Text Entry Box Preference:	Hidden <input type="checkbox"/>
Set "Country or Region" Preference:	Hidden <input type="checkbox"/>
Set "Contributor Roles" Preference:	Display <input type="checkbox"/>
Set "Deceased Status" Checkbox Preference:	Hidden <input type="checkbox"/>
Set "Equal Contribution Status" Checkbox Preference:	Hidden <input type="checkbox"/>
Set "Post-Publication Corresponding Author" Checkbox Preference:	Hidden <input type="checkbox"/>

Configure Contributor Roles:

em Editorial Manager™
Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Configure Contributor Roles

Contributor Roles can be attributed to each Author of a submission. On this page, you may choose your version of the taxonomy, specify the metadata to be collected, and define the custom instructions to be displayed to users when attributing roles. Then on the *Set Other Author Parameters* page, you can specify whether to collect Contributor Roles for your publication (along with the other parameters for Authors). Then on the *Edit Article Type* page, you can specify whether Contributor Roles are Required or Optional for an Article Type.

For more information on Contributor Roles and Project CRediT, click here: <http://credit.casrai.org>

Set Taxonomy Version

Select a version of the CRediT Taxonomy's Contributor Roles from the dropdown menu.

Choose Taxonomy: [View Taxonomy](#)

Select Additional Metadata to be Collected

The following options allow you to specify whether to collect a Degree of Contribution for each Contributor Role assigned to an Author, and whether to display a text box to allow the Corresponding Author to enter a name or description of a role that is not in the taxonomy.

Collect 'Degrees of Contribution'
 Display 'Other' field for free-text entry of a role name

Edit Instructions

Enter any instructions that you would like to appear when a user clicks the 'Instructions' link while editing the Contributor Roles for an Author.

Area	Instructions
Contributor Roles Instructions	<p>Insert Special Character</p> <p>The roles listed are from the CRediT Taxonomy, a classification standard used to ensure that Authors are credited for their contributions toward published scholarly works. Please visit http://credit.casrai.org for more information.</p> <p>You may select one or more Contributor Roles for each Author of a submission.</p> <p>If Contributor Roles are required for your</p> <p>View Default Instructions Revert to Default Instructions</p>

CRedit and PLOS

- PLOS implemented CRedit onto all of their EM sites in the summer of 2017
- Here, to speak about PLOS's experience with CRedit and EM, is Anne Tran



CRedit and PLOS

Our implementation

- PLOS enabled the CRedit taxonomy in EM in June of 2017.
- Prior to that, we were collecting contribution information using custom submission questions.



Author Contribution: data curation
Management activities to annotate (produce metadata), scrub data and maintain research data (including software code, where it is necessary for interpreting the data itself) for initial use and later re-use.

Character Count: 2

AA

Limit 2000 characters

Author Contribution: writing original draft
Preparation, creation and/or presentation of the published work, specifically writing the initial draft (including substantive translation).

Character Count: 8

CC AH TC

Limit 2000 characters

Author Contribution: writing review & editing
Preparation, creation and/or presentation of the published work by those from the



State CA

Zip or Postal Code* 94111

Country or Region* UNITED STATES

Contributor Roles*   [Instructions](#)

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

 PLOS requires CRedit for all authors.

CRedit and PLOS

Sharing is caring

- CRediT data is included in all formats of the published article.

✓ Web

✓ PDF

✓ XML

[mTOR signaling regulates central and peripheral circadian clock function](#)

Ramanathan C, Kathale ND, Liu D, Lee C, Freeman DA, et al. (2018) mTOR signaling regulates central and peripheral circadian clock function. *PLOS Genetics* 14(5): e1007369. <https://doi.org/10.1371/journal.pgen.1007369>

mTOR signaling regulates central and peripheral circadian clock function

Chidambaram Ramanathan, Nimish D. Kathale, Dong Liu, Choogon Lee, David A. Freeman, John B. Hogenesch, Ruifeng Cao, Andrew C. Liu

Article	Authors	Metrics	Comments	Related Content
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About the Authors

Chidambaram Ramanathan

Roles: Conceptualization, Data curation, Formal analysis, Investigation, Methodology, Project administration, Validation, Visualization, Writing – original draft, Writing – review & editing

Affiliation: Department of Biological Sciences, University of Memphis, Memphis, Tennessee, United States of America

Nimish D. Kathale

Roles: Data curation, Methodology, Visualization, Writing – review & editing

Affiliation: Department of Biological Sciences, University of Memphis, Memphis, Tennessee, United States of America

CRedit and PLOS

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PLOS | GENETICS

mTOR regulates circadian clock function

Dr. David Kwiatkowski at Dana-Farber Cancer Institute for *Tsc2* deficient fibroblasts and the *Rheb* constructs, and Dr. Shin Yamazaki at University of Texas Southwestern Medical Center for providing mouse tails that allowed us to generate adult tail fibroblasts deficient in *Per1/2/3*.

Author Contributions

Conceptualization: Chidambaram Ramanathan, Ruifeng Cao, Andrew C. Liu.

Data curation: Chidambaram Ramanathan, Nimish D. Kathale, Dong Liu, Ruifeng Cao, Andrew C. Liu.

Formal analysis: Chidambaram Ramanathan, Dong Liu, Ruifeng Cao.

Funding acquisition: Choogon Lee, John B. Hogenesch, Ruifeng Cao, Andrew C. Liu.

CRedit and PLOS

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CRedit and PLOS

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CRedit and PLOS

What next?

- With a normalized set of contribution types, we can begin to explore all sorts of questions about **how and where each one makes an impact.**

Does the geographic distribution of co-authors affect author contributions?

Is there a correlation between author order and certain contribution types?

Are there research areas with less variation in the contributions?

Do any contribution types occur together more frequently?

In what disciplines does this contribution come up the most/least?

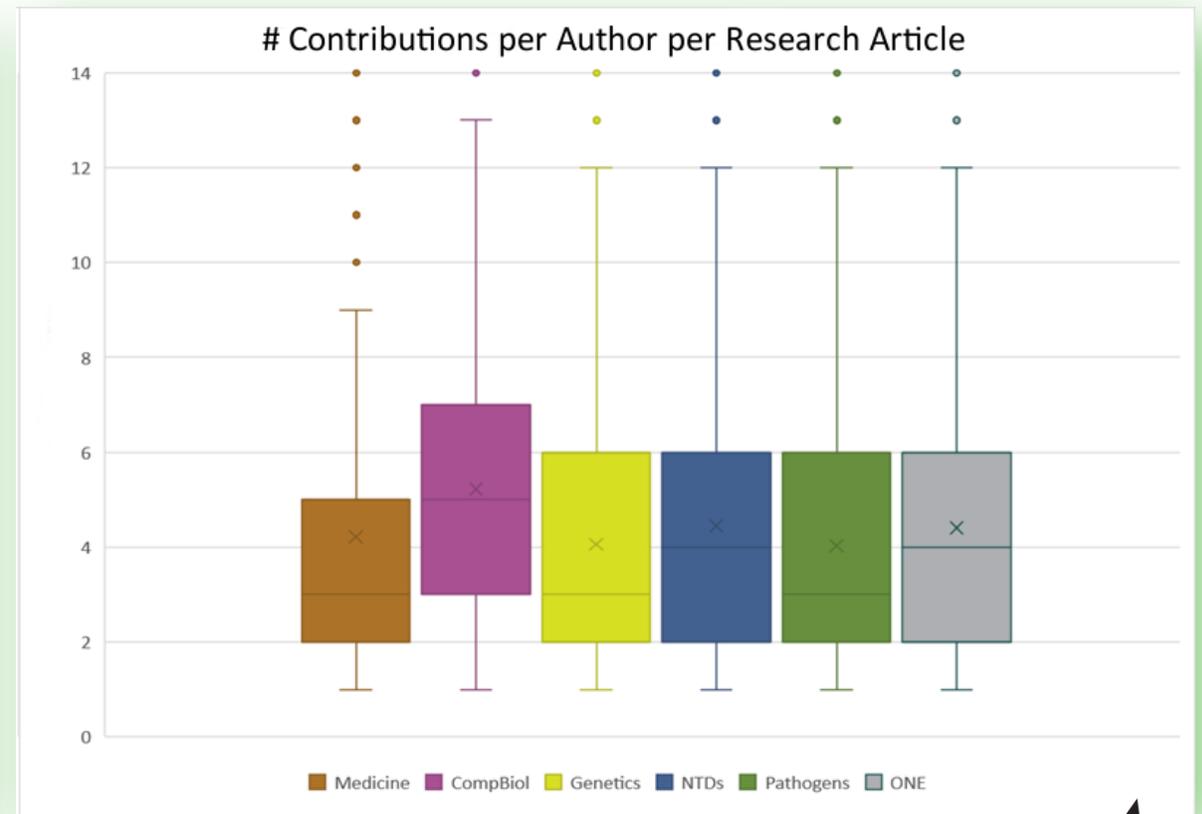
- We can also assess the **efficacy of the taxonomy itself.**

CRedit and PLOS

An initial look into the data

For articles (published btw Jun 15, 2017 & May 30, 2018)

- 18,828 articles
- 141,603 authors
- 622,609 contributions



CRedit and PLOS

An initial look into the data

In what disciplines does this contribution come up the most/least?

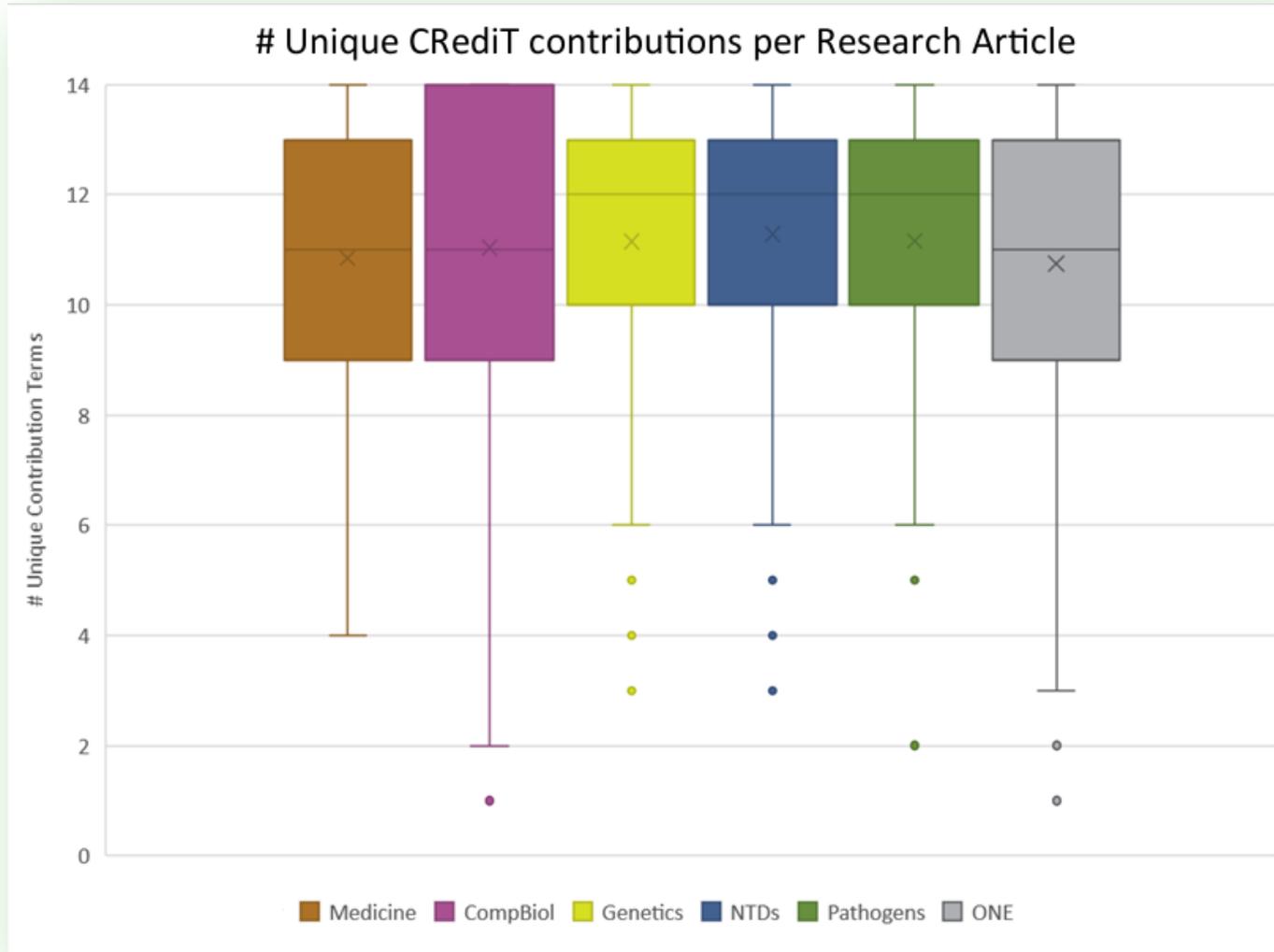
% of Research Articles where CRedit contribution X is used at least 1x

		Medicine	CompBiol	Genetics	NTDs	Pathogens	ONE	WAvg.
Traditional	Total Articles	149	468	479	727	510	16,495	18,828
	Investigation	82%	85%	96%	91%	96%	86%	89%
	Writing - Original Draft	99%	99%	100%	99%	99%	99%	99%
	Writing - Review & Editing	100%	97%	97%	98%	98%	97%	98%
	Conceptualization	100%	97%	98%	98%	99%	95%	98%
	Funding acquisition	77%	78%	92%	81%	92%	70%	82%
Non-Traditional	Methodology	95%	91%	84%	94%	88%	90%	90%
	Software	37%	75%	37%	36%	24%	40%	41%
	Validation	50%	61%	57%	62%	60%	57%	58%
	Formal analysis	98%	89%	92%	95%	93%	91%	93%
	Resources	54%	50%	62%	67%	70%	60%	60%
	Data curation	88%	62%	78%	80%	70%	80%	76%
	Visualization	46%	71%	59%	58%	58%	53%	58%
	Supervision	86%	85%	90%	91%	93%	84%	88%
Project administration	72%	63%	72%	78%	76%	72%	72%	



CRedit and PLOS

An initial look into the data



Are there research areas with less variation in the contributions?

CRedit and PLOS

An initial look into the data

% of DOIs where at least 2 authors chose the same CRedit contribution X

	Medicine	CompBiol	Genetics	NTDs	Pathogens	ONE	WAvg.
Total Articles	149	468	479	727	510	16,495	18,828
Investigation	74%	62%	86%	81%	90%	68%	77%
Writing - Original Draft	63%	74%	77%	69%	75%	60%	70%
Writing - Review & Editing	100%	92%	90%	93%	90%	85%	92%
Conceptualization	95%	85%	86%	88%	85%	78%	86%
Funding acquisition	60%	41%	56%	55%	55%	38%	51%

% of Research Articles where CRedit contribution X is used at least 1x

	Medicine	CompBiol	Genetics	NTDs	Pathogens	ONE	WAvg.
Total Articles	149	468	479	727	510	16,495	18,828
Investigation	82%	85%	96%	91%	96%	86%	89%
Writing - Original Draft	99%	99%	100%	99%	99%	99%	99%
Writing - Review & Editing	100%	97%	97%	98%	98%	97%	98%
Conceptualization	100%	97%	98%	98%	99%	95%	98%
Funding acquisition	77%	78%	92%	81%	92%	70%	82%





Any Questions?



And a VERY special thanks to Anne!