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

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## #EMUG2018

 Editorial Manager®  ProduXion Manager®

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# Co-Author Workflows & Functionality

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Applications Systems Analyst

[atran@plos.org](mailto:atran@plos.org)

- 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



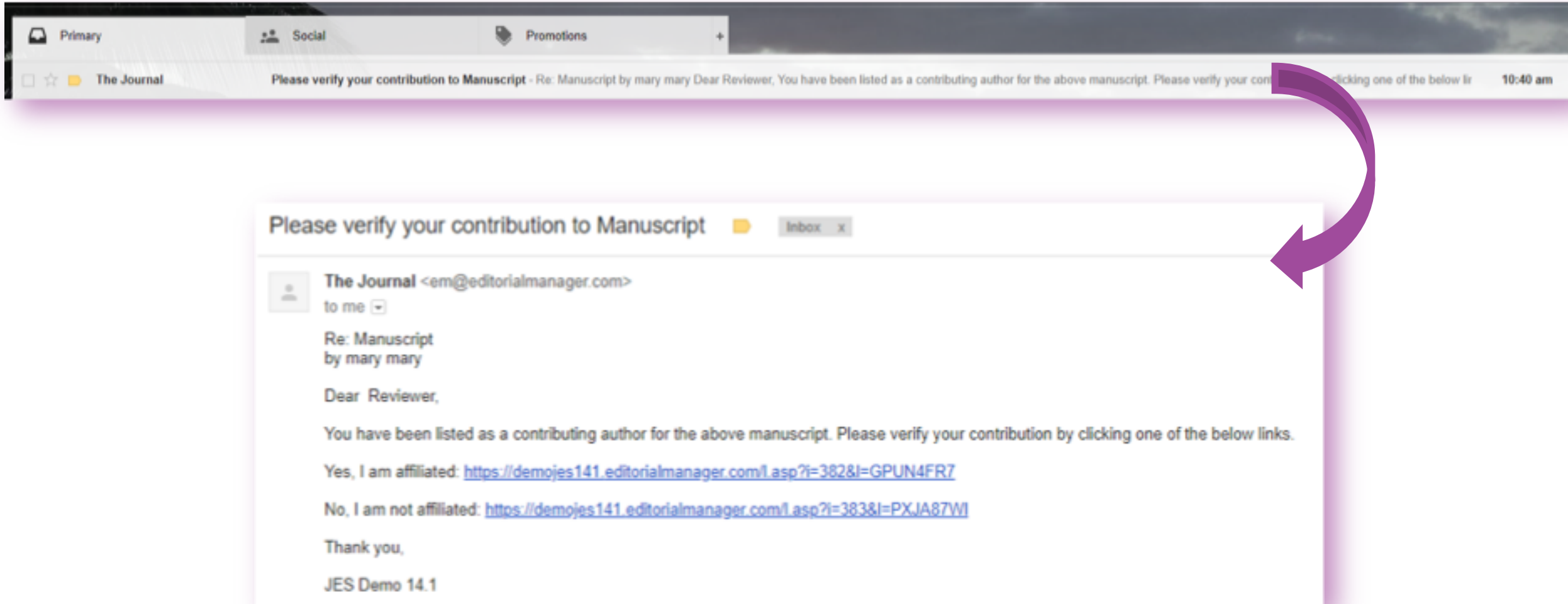
- Triggers a link that goes out in a letter to Co-Authors so that they can confirm their participation with the submission
- No login required

### 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:



# 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
- ORCIDs\*
- Contributor Roles\*



\*These will be mentioned briefly, but we will go over them in more detail later



# 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.											
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"/>	WEEDEN-D-16-00012 <a href="#">Details</a> <a href="#">History</a>	Original Study	demo	Revise	m c	c@trash.com	mary mary		Jun 13, 2014		
<input type="checkbox"/>	WEEDEN-D-16-00013 <a href="#">Details</a> <a href="#">History</a>	Original Study	EMUG demo	Manuscript Submitted	Jane Doe	doe@trash.com			Jun 14, 2014		
<input checked="" type="checkbox"/>	WEEDEN-D-16-00016 <a href="#">Details</a> <a href="#">History</a>	Original Study	EMUG 2016	Under Review	Melanie Cottrell	mcottrell@ariessys.com	Mary Smith	Mary Smith	Jun 16, 2016	Jun 16, 2016	701 0
<input type="checkbox"/>	WEEDEN-D-16-00018 <a href="#">Details</a> <a href="#">History</a>	Original Study	EEHUG 2017	Required Reviews Completed	Melanie Cottrell	mcottrell2@ariessys.com	Mary Smith	Mary Smith	Dec 30, 2016	Dec 30, 2016	504 0
<input checked="" type="checkbox"/>	WEEDEN-D-17-00001R1 <a href="#">Details</a> <a href="#">History</a>	Original Study	EEHUG other	Under Review	Lincoln Hawthorne	jenifleet@yahoo.com	Ellen Editor	Ellen Editor	Jan 04, 2017	Jan 04, 2017	Jan 04, 2017 499 0
<input checked="" type="checkbox"/>	WEEDEN-D-17-00001R1 <a href="#">Details</a> <a href="#">History</a>	Original Study	EEHUG 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"/>	WEEDEN-D-17-00002 <a href="#">Details</a> <a href="#">History</a>	Original Study	EEHUG 2017	Revise	Elizabeth Hopkins	bhopkins@ariessys.com	Dianne Gullo		Jan 12, 2017	Jan 12, 2017	491 0
<input type="checkbox"/>	WEEDEN-D-17-00005 <a href="#">Details</a> <a href="#">History</a>	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:





# 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)

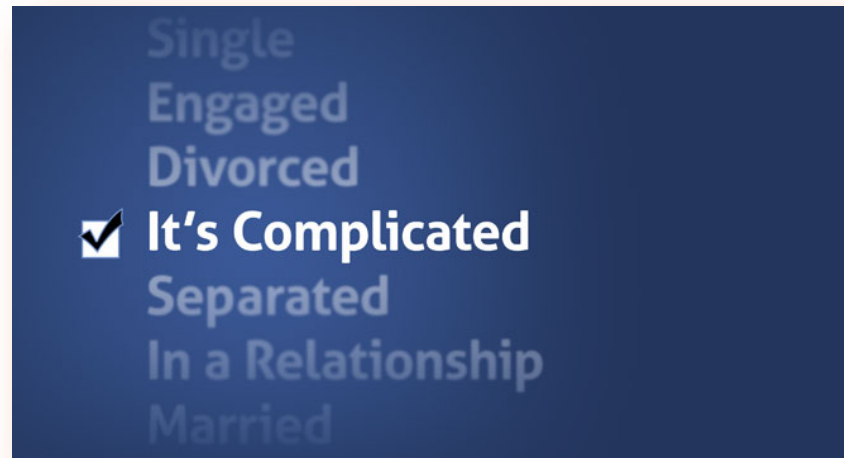
Authors and Personal Identifiers View	
<input type="checkbox"/> Actual Online Publication Date	<input type="checkbox"/> Editorial Submission
<input type="checkbox"/> Article Title	<input type="checkbox"/> Equal Contribution Status
<input type="checkbox"/> Article Type	<input type="checkbox"/> Final Decision 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

# Co-Author Reporting

- EAR Report using the “Authors and Personal Identifiers” View:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Manuscript Number	Article Title	Article Type	Revision Number	Author's First Name	Author's Last Name	Author's E-mail address	Author Type	Author's Academic Degree	Author's Institution	Author's Order	Contributor Roles	ORCID	Other Author Verification Status	Other Author Verification
152	DEMOJES141-D-18-0004	Manuscript	Original Study	1	Adam	Author	aauthor@ariestrash.com	off			3				0 5/23/2018
153	DEMOJES141-D-18-0004	Manuscript	Original Study	1	Angela	Author	angauth@ariestrash.com	off			5				0 5/23/2018
154	DEMOJES141-D-18-0004	Manuscript	Original Study	1	Astrid	Author	astridauth@ariestrash.com	off			4				0 5/23/2018
155	DEMOJES141-D-18-0004	Manuscript	Original Study	1	Jessica	Reviewer	jsnapke@gmail.com	off			2		0000-0003-1135		2 5/23/2018
156	DEMOJES141-D-18-0004	Manuscript	Original Study	1	mary	mary	jsnapke@ariessys.com	on			1				
157	DEMOJES141-D-18-0004	Manuscript	Original Study	2	Adam	Author	aauthor@ariestrash.com	off		Michigan State	3				0 5/23/2018
158	DEMOJES141-D-18-0004	Manuscript	Original Study	2	Ainsley	Author	ainsauth@ariestrash.com	off		Michigan State	5				0 5/23/2018
159	DEMOJES141-D-18-0004	Manuscript	Original Study	2	Astrid	Author	astridauth@ariestrash.com	off		Michigan State	4				0 5/23/2018
160	DEMOJES141-D-18-0004	Manuscript	Original Study	2	Jessica	Reviewer	jsnapke@gmail.com	off	MSUS	Michigan State	2		0000-0003-1135		2 5/23/2018
161	DEMOJES141-D-18-0004	Manuscript	Original Study	2	mary	mary	jsnapke@ariessys.com	on			1				
162	DEMOJES141-D-18-0004	Manuscript	Original Study	0	Ainsley	Author	ainsauth@ariestrash.com	off		Michigan State	4	Investigation:Supporting; Meth			0 5/31/2018
163	DEMOJES141-D-18-0004	Manuscript	Original Study	0	Albert	Author	alauth@ariestrash.com	off		Michigan State	6	Writing - Original Draft:Equal; V			0 5/31/2018
164	DEMOJES141-D-18-0004	Manuscript	Original Study	0	Astrid	Author	astridauth@ariestrash.com	off		Michigan State	5	Project administration:Support			0 5/31/2018
165	DEMOJES141-D-18-0004	Manuscript	Original Study	0	Jessica	Reviewer	jsnapke@gmail.com	off	MSUS		2	Conceptualization:Lead; Data ci			2 5/31/2018
166	DEMOJES141-D-18-0004	Manuscript	Original Study	0	mary	mary	jsnapke@ariessys.com	on			1				
167	DEMOJES141-D-18-0004	Manuscript	Original Study	0	Victoria	Scibilia	vscibilia@ariessys.com	off		Michigan State	3	Formal analysis:0000-0002-495C			2 5/31/2018
168	DEMOJES141-D-18-0004	Manuscript	Original Study	1	Ainsley	Author	ainsauth@ariestrash.com	off		Michigan State	4	Investigation:Supporting; Meth			0 5/31/2018
169	DEMOJES141-D-18-0004	Manuscript	Original Study	1	Astrid	Author	astridauth@ariestrash.com	off		Michigan State	5	Project administration:Support			0 5/31/2018
170	DEMOJES141-D-18-0004	Manuscript	Original Study	1	Jessica	Reviewer	jsnapke@gmail.com	off	MSUS	Michigan State	2	Conceptualization:Lead; Data ci			2 5/31/2018
171	DEMOJES141-D-18-0004	Manuscript	Original Study	1	mary	mary	jsnapke@ariessys.com	on			1				
172	DEMOJES141-D-18-0004	Manuscript	Original Study	1	Victoria	Scibilia	vscibilia@ariessys.com	off		Michigan State	3	Formal analysis:0000-0002-495C			2 5/31/2018
173	DEMOJES141-D-18-0004	Manuscript	Original Study	2	Ainsley	Author	ainsauth@ariestrash.com	off		Michigan State	4	Investigation:Supporting; Meth			0 5/31/2018
174	DEMOJES141-D-18-0004	Manuscript	Original Study	2	Astrid	Author	astridauth@ariestrash.com	off		Michigan State	5	Project administration:Support			0 5/31/2018
175	DEMOJES141-D-18-0004	Manuscript	Original Study	2	Jessica	Reviewer	jsnapke@gmail.com	off	MSUS	Michigan State	2	Conceptualization:Lead; Data ci			2 5/31/2018
176	DEMOJES141-D-18-0004	Manuscript	Original Study	2	mary	mary	jsnapke@ariessys.com	on			1				
177	DEMOJES141-D-18-0004	Manuscript	Original Study	2	Victoria	Scibilia	vscibilia@ariessys.com	off		Michigan State	3	Formal analysis:0000-0002-495C			2 5/31/2018
178	DEMOJES141-D-18-0004	Manuscript	Original Study	0	Jessica	Reviewer	jsnapke@gmail.com	off			2	Conceptualization:Lead			2 6/4/2018
179	DEMOJES141-D-18-0004	Manuscript	Original Study	0	mary	mary	jsnapke@ariessys.com	on			1				
180	DEMOJES141-D-18-0004	Title	Original Study	0	Jessica	Reviewer	jsnapke@gmail.com	off			3				2 6/5/2018
181	DEMOJES141-D-18-0004	Title	Original Study	0	mary	mary	jsnapke@ariessys.com	on			1				
182	DEMOJES141-D-18-0004	Title	Original Study	0	Victoria	Scibilia	vscibilia@ariessys.com	off			2		0000-0002-495C		0 6/5/2018
183	DEMOJES141-D-18-0005	Authors, Co-Authors!	Original Study	0	Aaron	Author	aaronauth@ariestrash.com	off		Michigan State	4				0 6/11/2018
184	DEMOJES141-D-18-0005	Authors, Co-Authors!	Original Study	0	Ainsley	Author	ainsauth@ariestrash.com	off		Michigan State	3				0 6/11/2018
185	DEMOJES141-D-18-0005	Authors, Co-Authors!	Original Study	0	Jessica	Author	jsnapke@gmail.com	off		Michigan State	2				0 6/11/2018
186	DEMOJES141-D-18-0005	Authors, Co-Authors!	Original Study	0	mary	mary	jsnapke@ariessys.com	on			1				
187															

# (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**

Corresponding Author: mary mary VP  
Corresponding Author E-Mail: jsnapke@ariesys.com  
Initiate Discussion

**All Authors:**

- mary mary VP
- Jessica Reviewer
- Adam Author
- Astrid Author
- Angela Author
- Author Status**

**Author Status - Google Chrome**

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

Corresponding Author Status

Order	Author Name	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	mary mary	jsnapke@ariesys.com				<a href="#">View Author Details</a>

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					Yes May 23 2018 10:53 AM	<a href="#">Reset Confirmation Status</a> <a href="#">View Author Details</a> <a href="#">View Questionnaire Responses</a>
3	Adam Author <b>New</b>	R1-mary mary	aauthor@ariestrash.com					No Response	<a href="#">Resend Letter</a> <a href="#">View Author Details</a> <a href="#">Questionnaire Not Completed</a>
4	Astrid Author <b>New</b>	R1-mary mary	astridauth@ariestrash.com					No Response	<a href="#">Resend Letter</a> <a href="#">View Author Details</a> <a href="#">Questionnaire Not Completed</a>
5	Angela Author <b>New</b>	R1-mary mary	angauth@ariestrash.com					No Response	<a href="#">Resend Letter</a> <a href="#">View Author Details</a> <a href="#">Questionnaire Not Completed</a>

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



www.editorialmanager.com/demojes141/default.aspx

Apps Bookmarks

Editorial Manager™

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

Important Message: Site under development

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 M North Andover MA UNITED STATES [Preview]

Corresponding Author E-Mail: jsnapke@ariesys.com

Discussion Forum: Initiate Discussion

Author Comments:

Other Authors:

All Authors:

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 Review: 14

Final Disposition Term: Communication Editor

Author Status - Google Chrome

www.editorialmanager.com/demojes141/ContributingAuthorStatus.aspx?docID=88&msid=[00FDA8E1-830B-480D-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	Institution	Confirmed?	Options
1	mary mary		jsnapke@ariesys.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 2:06 PM	Reset Confirmation Status View Author Details View Questionnaire Responses
3	Victoria Scibila	R0	Formal analysis (Lead) Funding acquisition (Equal)	vschila@ariesys.com [Edit]	0000-0002-4950-9969		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

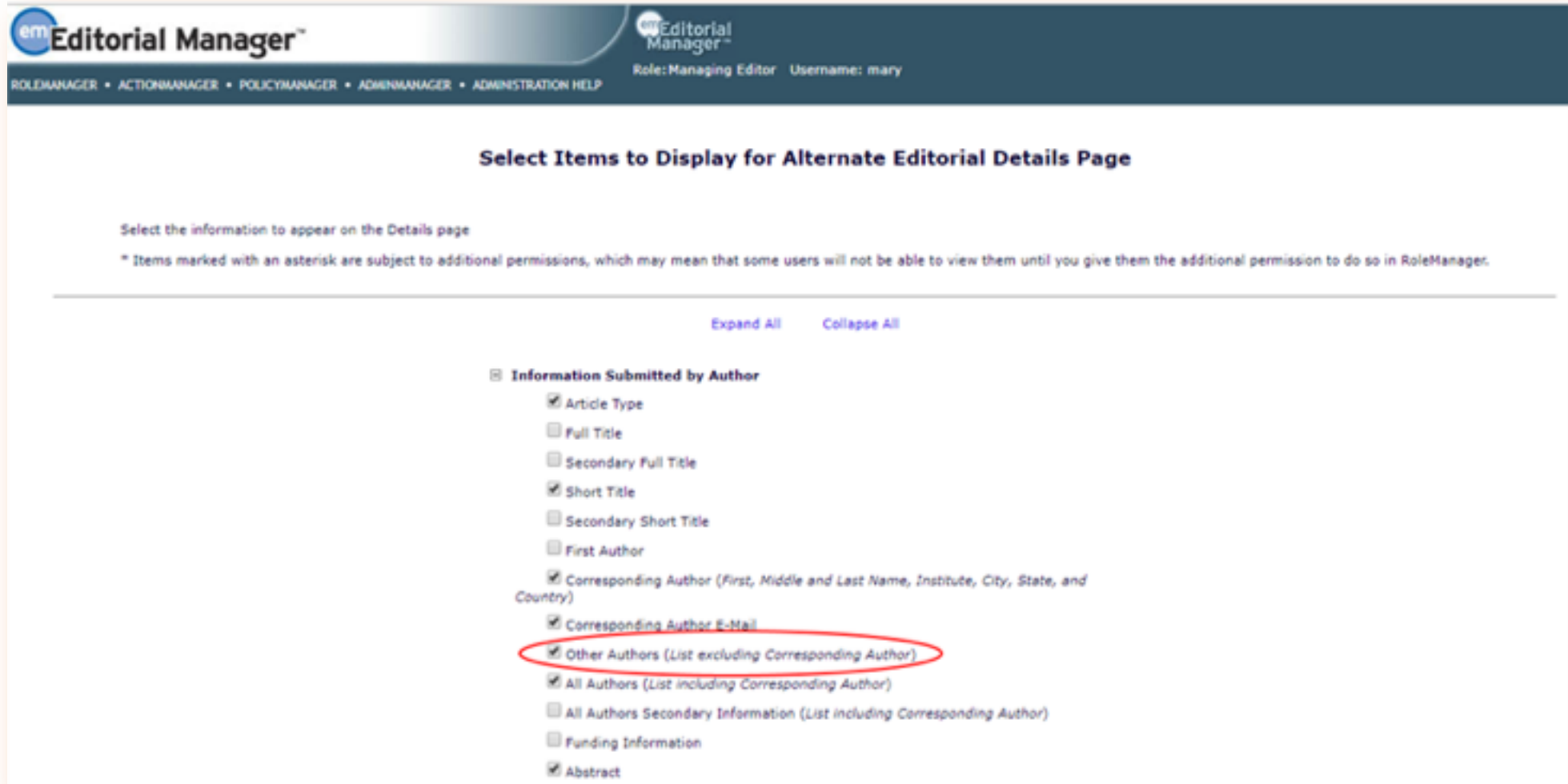
Options
Reset Confirmation Status
View Author Details
View Questionnaire Responses
Reset Confirmation Status
View Author Details
View Questionnaire Responses
Resend Letter
View Author Details
Questionnaire Not Completed
Resend Letter
View Author Details
Questionnaire Not Completed



- 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



**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 Status Page
  - Previously only Affiliation was displayed
- New feature in 15.0
  - 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 Author
- 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

em Editorial Manager™

Role: Managing Editor Username: mary

ROLEDMANAGER • 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
  - 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

Editorial Manager™

Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

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

[Add Question](#)

Actions	Description
<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Hide</a>	Please confirm you have approval from all Co-authors to submit the
<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Hide</a>	If you have submitted this manuscript to another publication please
<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Hide</a>	Please enter the date you submitted the paper to another publicat
<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Hide</a>	Please enter the <b>Word Count</b> of your manuscript
<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Hide</a>	<b>Open Science Badges:</b> Are you interested in applying for one or more of the following Op Data Badge, [2] Open Materials Badge, or [3] Preregistration Badge Please click <a href="#">here</a> for more information.
<a href="#">Edit</a> <a href="#">Copy</a>	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	<a href="#">Associate with Flag</a>
<input type="radio"/>	<input type="text"/>	<a href="#">Associate with Flag</a>

[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

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

### 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
<b>Add Custom Questions</b>					

**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 checked="" type="checkbox"/>	<a href="#">Remove</a>

**Select Custom Questions**

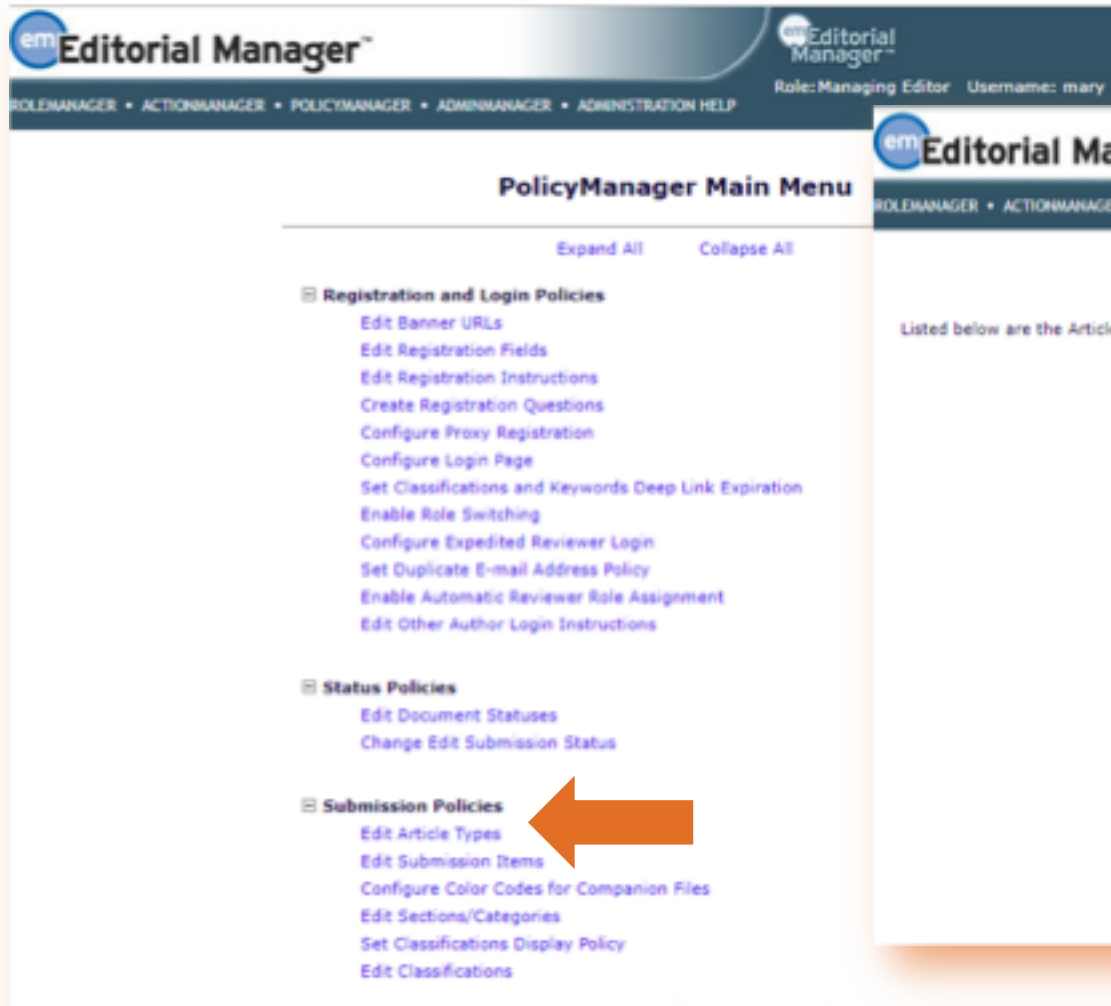
Custom Questions available for use in a Questionnaire are displayed below. Select the Custom Questions you wish to add, and click the 'Add to Questionnaire' button to add them to the Questionnaire. Questions displayed in gray text have already been added to the Questionnaire and cannot be selected again.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

Custom Questions:

Select	Description	Custom Metadata ID
<input type="checkbox"/>	Please confirm you have approval from all Co-authors to submit this manuscript?	
<input type="checkbox"/>	If you have submitted this manuscript to another publication please give details below	
<input type="checkbox"/>	Please enter the date you submitted the paper to another publication.	
<input type="checkbox"/>	Please enter the Word Count of your manuscript	
<input type="checkbox"/>	§ 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 <a href="#">here</a> for more information.	
<input type="checkbox"/>	Are you a "Society A" member?	
<input type="checkbox"/>	Are you a "Society B" member?	
<input type="checkbox"/>	§ Do you or your institution receive payments or services from a third party for any aspect of this work?	
<input checked="" type="checkbox"/>	§ 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 > ...

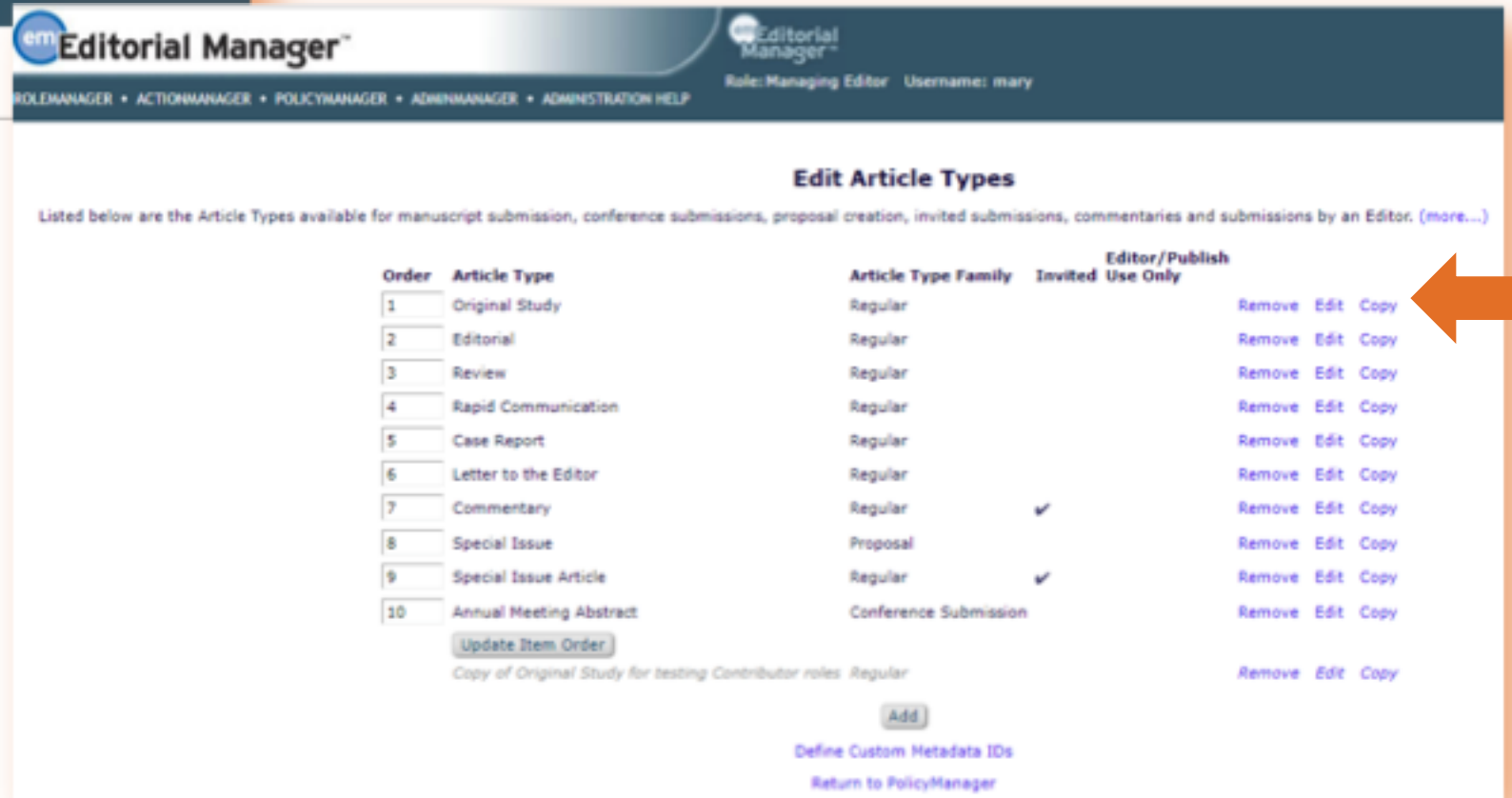


The screenshot shows the Editorial Manager interface. The top navigation bar includes links for ROLEMANAGER, ACTIONMANAGER, POLICYMANAGER, ADMINMANAGER, and ADMINISTRATION HELP. The user is logged in as 'mary' with the role of 'Managing Editor'. The main menu is titled 'PolicyManager Main Menu' and has two buttons: 'Expand All' and 'Collapse All'. The menu is organized into three sections: 'Registration and Login Policies', 'Status Policies', and 'Submission Policies'. The 'Submission Policies' section is highlighted with an orange arrow pointing to 'Edit Article Types'.

**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



The screenshot shows the 'Edit Article Types' page in Editorial Manager. The top navigation bar is the same as the previous screenshot. The page title is 'Edit Article Types'. Below the title, there is a note: 'Listed below are the Article Types available for manuscript submission, conference submissions, proposal creation, invited submissions, commentaries and submissions by an Editor. (more...)'. The main content is a table with columns: Order, Article Type, Article Type Family, Invited, Editor/Publish Use Only, and a set of actions (Remove, Edit, Copy). The table lists 10 article types. The 'Invited' column has checkmarks for 'Commentary' and 'Special Issue Article'. The 'Editor/Publish Use Only' column has checkmarks for 'Commentary' and 'Special Issue Article'. An orange arrow points to the 'Copy' link for the first row (Original Study). Below the table, there is a button 'Update Item Order' and a note 'Copy of Original Study for testing Contributor roles: Regular'. At the bottom, there are links for 'Add', 'Define Custom Metadata IDs', and 'Return to PolicyManager'.

**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	Invited	Editor/Publish Use Only	
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

[Update Item Order](#)

Copy of Original Study for testing Contributor roles: Regular

[Add](#)

[Define Custom Metadata IDs](#)

[Return to PolicyManager](#)



# 3. Tie Questionnaire to an Article Type

- Designate Author Questionnaire > Select Questionnaire from Dropdown

**Editorial Manager™**

Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

### Article Type Parameters

	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 ▾

You may set Minimum and/or Maximum limits for the 'Number of Classifications' under Field Size Limitations below.

You must configure an email address to receive waiver requests on the 'Configure Waiver Request' page in PolicyManager.

# Co-Author Questionnaire

The screenshot shows the Editorial Manager website interface. At the top, there's a navigation bar with links like HOME, LOGIN, HELP, REGISTER, etc. A red banner below the navigation bar states: "Important Message: Site under development. Do not use for live manuscript submission." The main content area is titled "Verify Contributing Authorship". It contains a warning message on the left: "Warning! You must submit this page to verify your contribution to the submission." Below this is a "Print" button. The main text area explains the purpose of the questionnaire and provides a deep link to return to the page later: <http://www.editorialmanager.com/demojes141/l.asp?i=438&l=RQOLXUQE>. The questionnaire itself asks: "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?" with radio button options for "Please select a response", "Yes", and "No". Below this is a text box for "Please detail the influence:" with a character count of 14 and a limit of 20000 characters. At the bottom are "Save for Later" and "Submit to Publication" buttons.

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=RQOLXUQE>

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



- Decision Letters:
  - 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 Communications Letter Family:
  - 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 web interface. On the left, a sidebar titled 'Notify Author Confirmation' shows a message: 'The Author Notification Letter "Your Submission" has been e-mailed to: mary mary jnapke@ariesys.com'. A green arrow points from this message to the email preview on the right. The email preview shows the header 'em.demojes141.0.5bad02.794d1ca7@editorialmanager.com on behalf of The Journal <em@editorialmanager.com>' and the subject 'Your Submission'. The email body includes a reference number 'Ref.: Ms. No. DEMOJES141-D-18-00047R1', a greeting 'Dear mary,', and a decision letter stating that reviewers have commented and the author is advised to revise the manuscript. A green arrow points from the email body to the 'Action Items' section, which lists the email addresses of the reviewers and authors: 'CC: jnapke@gmail.com, vscibilia@ariesys.com, ainsauth@ariestrash.com, astridauth@ariestrash.com'.

Editorial Manager™

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MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Go to: Search Page —  
Rules: Managing Editor — View

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

**Notify Author Confirmation**

The Author Notification Letter "Your Submission" has been e-mailed to:  
mary mary jnapke@ariesys.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: [jnapke@gmail.com](mailto:jnapke@gmail.com), [vscibilia@ariesys.com](mailto:vscibilia@ariesys.com), [ainsauth@ariestrash.com](mailto:ainsauth@ariestrash.com), [astridauth@ariestrash.com](mailto: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

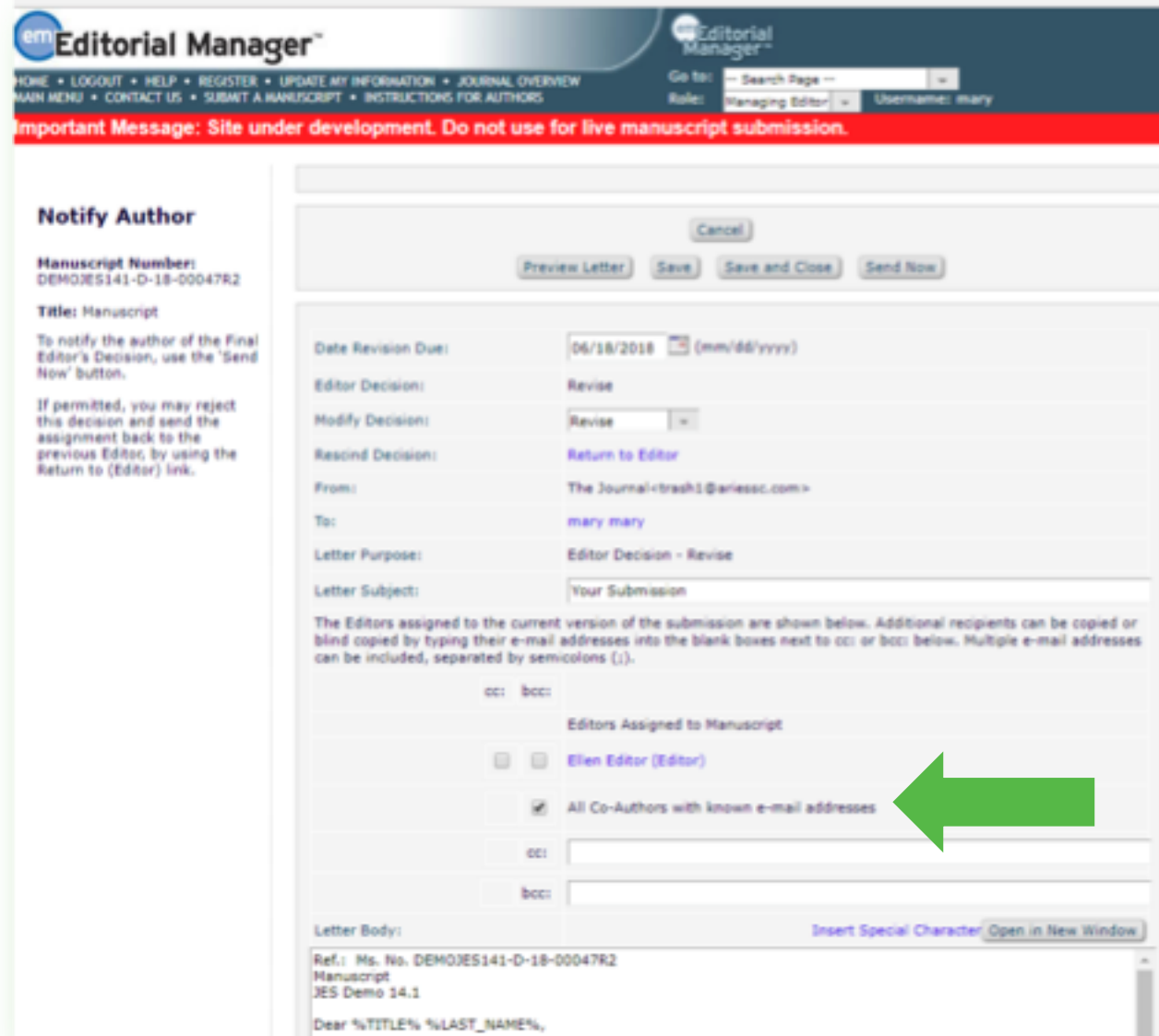
mary mary  
Managing Editor  
JES Demo 14.1

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:** 04/18/2018 (mm/dd/yyyy)

**Editor Decision:** Revise

**Modify Decision:** Revise

**Rescind Decision:** Return to Editor

**From:** The Journal <trash1@ariescc.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:

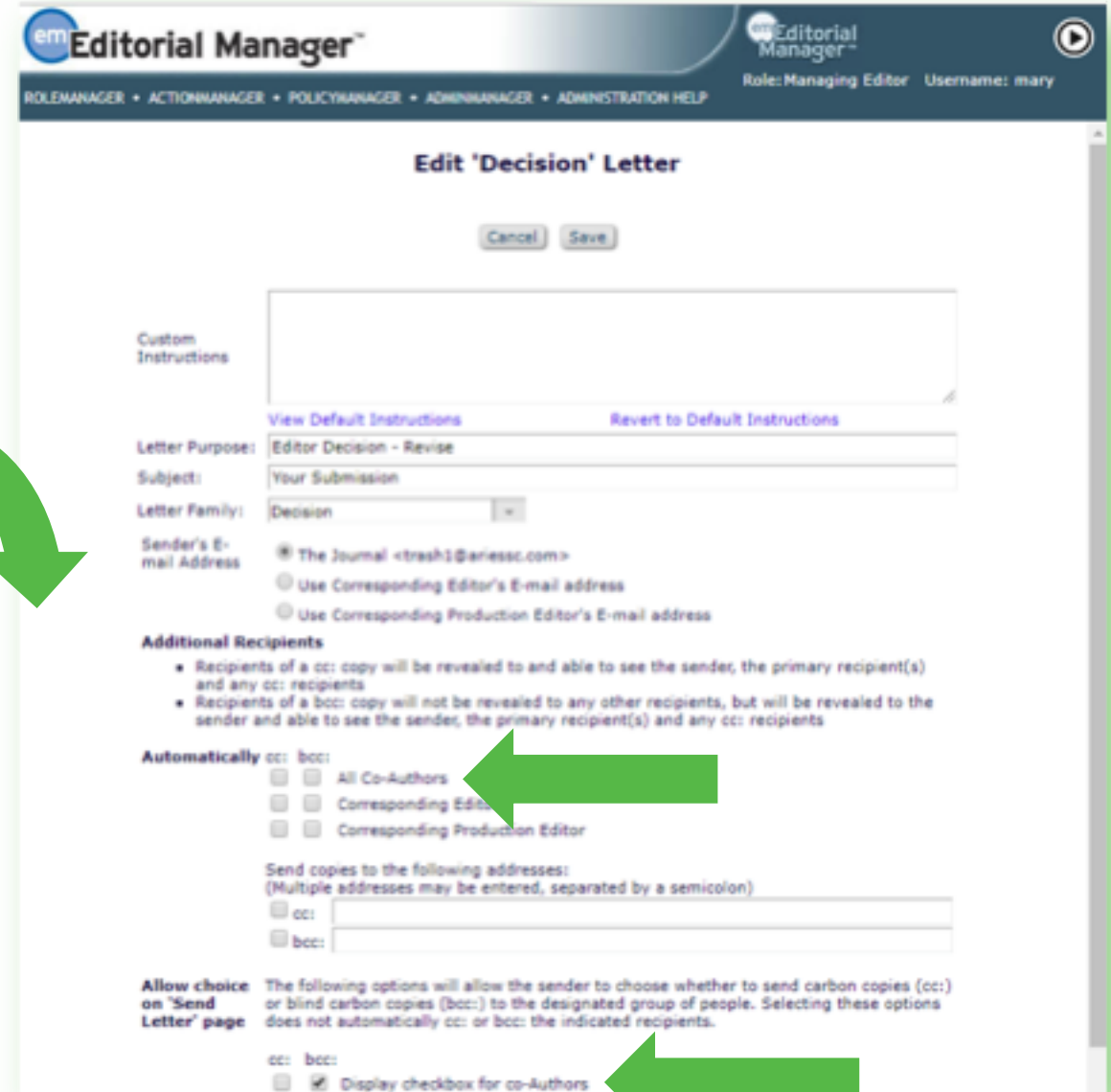
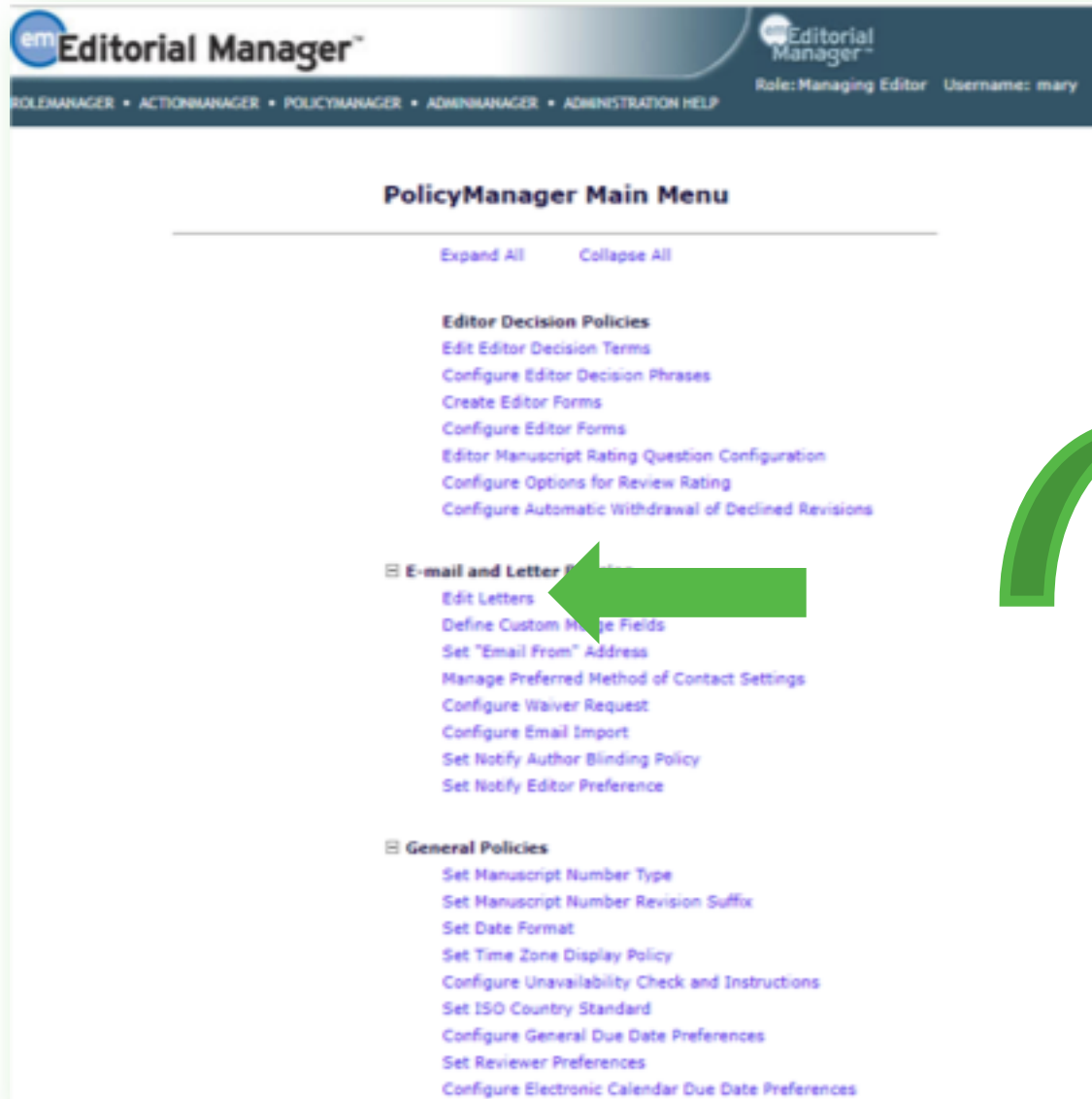
bcc:

**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



# 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

**em Editorial Manager™**

Role: Managing Editor Username: mary

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

### Add 'Co-Author Communications' Letter

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.

[Cancel](#) [Save](#)

**Custom 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.

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

Letter Purpose: Co-Author Notification

Subject: Hello Co-Author

Letter Family: Co-Author Communications

Sender's E-mail Address

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

- 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™**

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

- System Admin Functions > RoleManager > Author Role > Edit

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

# 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 web interface. The top navigation bar includes the 'em Editorial Manager' logo, a breadcrumb trail (ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP), and user information (Role: Managing Editor Username: mary). The main heading is 'Select Co-Author Metadata Fields'. Below the heading are 'Cancel' and 'Save' buttons. A paragraph explains that the form contains metadata information stored for Co-Authors and provides instructions on selecting fields for transmission to the production system. It also includes links for 'Check All', 'Clear All', and 'Add Author Metadata Fields'. The main content area is a table with three columns: 'Select Field' (checkboxes), 'Field Name', and 'Help' (links).

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

# ORCID Solicitation from Co-Authors:

Two ways to solicit ORCIDs 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 ▾

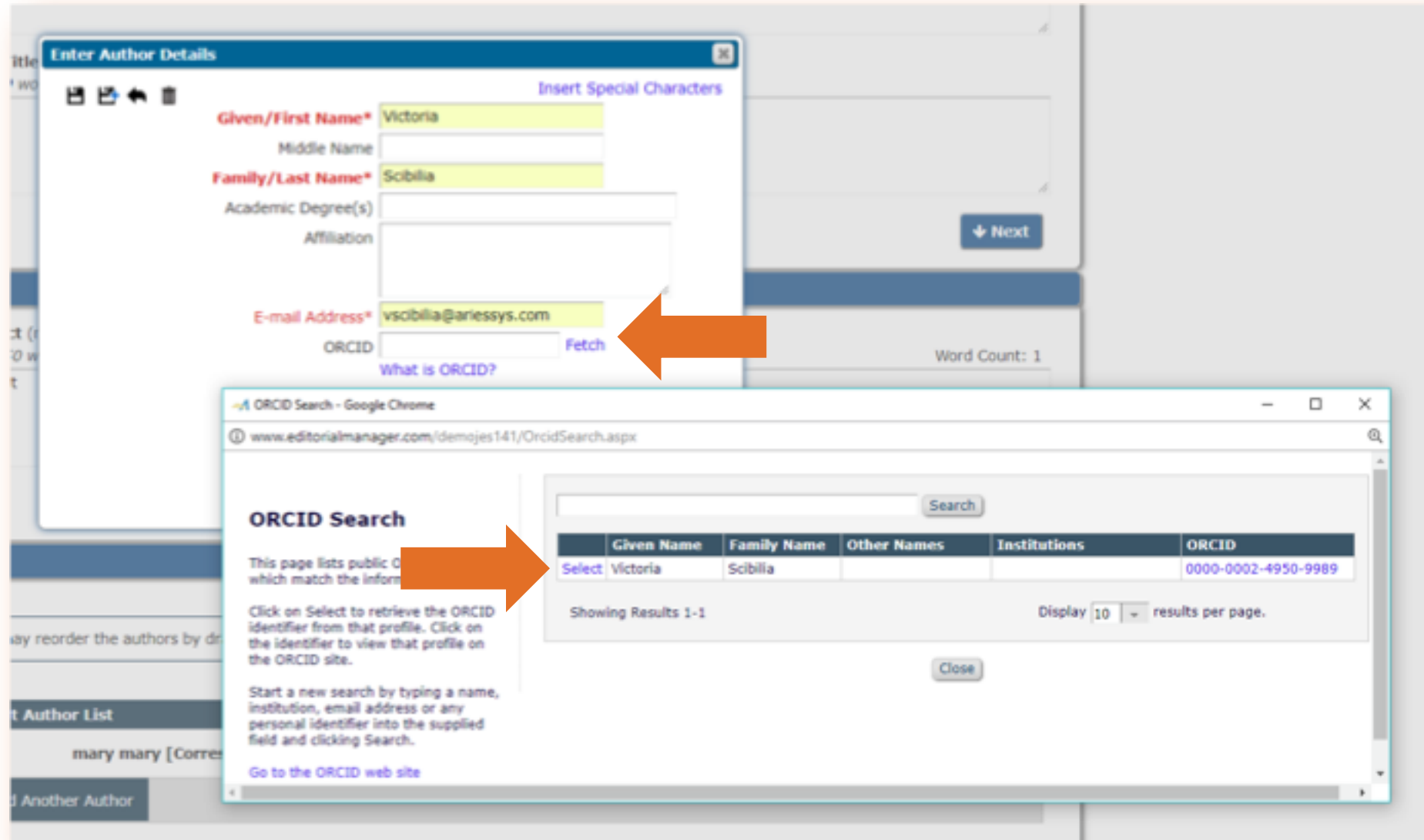
Authenticated ORCID ID Request: Optional ▾ 

☒ 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:





## 2. “Fetch”- Configuration

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

**Editorial Manager™**

Role: Managing Editor Username:

ROLEDMANAGER • 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"/>

# CReditT

## What is CReditT?

- “CReditT 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 CReditT into EM
- Viewed previously on MS Submission Steps and Author Status page



# 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)



# CRedit - Configurations

## Set Other Author Parameters:

**em Editorial Manager™**  
Role: Managing Editor Username: mary

ROLES MANAGER • ACTION MANAGER • POLICY MANAGER • ADMIN MANAGER • 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:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Institution" Text Entry Box Preference:	<input type="text" value="Optional"/> <input type="checkbox"/>
Set "Department" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Secondary Institution" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Secondary Department" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Street Address" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "City" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "State" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Secondary Street Address" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Secondary City" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Secondary State" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Zip or Postal Code" Text Entry Box Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Country or Region" Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Contributor Roles" Preference:	<input type="text" value="Display"/> <input type="checkbox"/>
Set "Deceased Status" Checkbox Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Equal Contribution Status" Checkbox Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>
Set "Post-Publication Corresponding Author" Checkbox Preference:	<input type="text" value="Hidden"/> <input type="checkbox"/>

## Configure Contributor Roles:

**em Editorial Manager™**  
Role: Managing Editor Username: mary

ROLES MANAGER • ACTION MANAGER • POLICY MANAGER • ADMIN MANAGER • 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><a href="#">Insert Special Character</a></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 <a href="http://credit.casrai.org" target="_blank">http://credit.casrai.org</a> for more information.</p> <p><b>&lt;br /&gt;</b> You may select one or more Contributor Roles for each Author of a submission.</p> <p><b>&lt;br /&gt;</b> If Contributor Roles are required for your</p> <p><a href="#">View Default Instructions</a> <a href="#">Revert to Default Instructions</a></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 – pre-CRedit

- PLOS has always collected author contributions in some form.
- Before the CRediT taxonomy was created, we collected these contribution types:

- ✓ Conceived and designed the experiments
- ✓ Performed the experiments
- ✓ Analyzed the data
- ✓ Contributed reagents/materials/analysis tools
- ✓ Wrote the manuscript
- ✓ Other



# CRedit and PLOS

## Our implementation – post-CRedit

- When CRedit came out, we used custom submission questions to collect author contributions.



**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

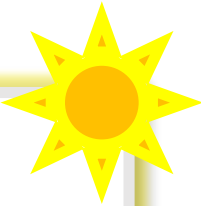
CC AH TC

Limit 2000 characters

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



- In June 2017, we enabled the CRedit taxonomy in EM.



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](https://doi.org/10.1371/journal.pgen.1007369)

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
	⌵			

## 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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</contrib>
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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?

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

Are there research areas with less variation in the contributions?

Do any contribution types occur together more frequently?

- We can also assess the **adequacy 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?

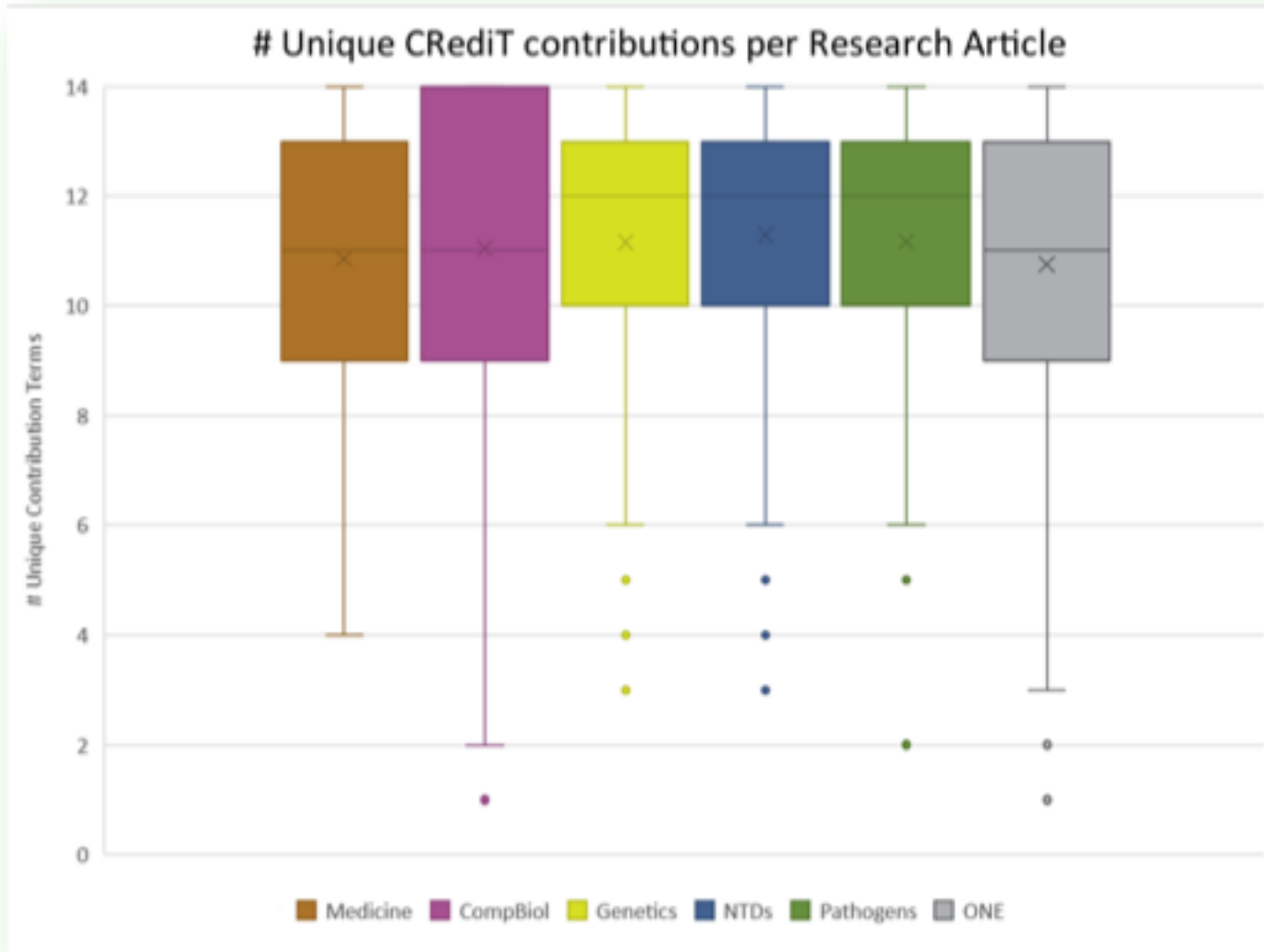
% of Research Articles where CRedit contribution X is used at least 1x

		Medicine	CompBiol	Genetics	NTDs	Pathogens	ONE	WAvg.
Traditional	<b>Total Articles</b>	<b>149</b>	<b>468</b>	<b>479</b>	<b>727</b>	<b>510</b>	<b>16,495</b>	<b>18,828</b>
	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



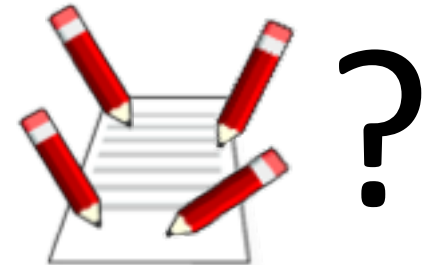
Are there research areas with less variation in the contributions?

# 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.
<b>Total Articles</b>	<b>149</b>	<b>468</b>	<b>479</b>	<b>727</b>	<b>510</b>	<b>16,495</b>	<b>18,828</b>
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.
<b>Total Articles</b>	<b>149</b>	<b>468</b>	<b>479</b>	<b>727</b>	<b>510</b>	<b>16,495</b>	<b>18,828</b>
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%



# CReditT and PLOS



Anne Tran  
PLOS  
[atran@plos.org](mailto:atran@plos.org)



Any Questions?





And a VERY special thanks to Anne!