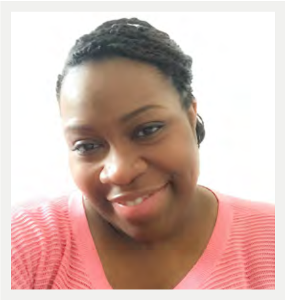
http://dx.doi.org/10.18243/eon/2017.10.3.2

Taming Technology: Underused Features in Editorial Manager



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Editorial Manager (EM) includes thousands of configuration points that can be leveraged to customize and streamline submission and peer-review workflows. However, many users are not aware of features that could represent substantial time savings and/or add value to their workflows. For this reason, at each of our biannual User Group Meetings, Aries Account Coordinators deliver sessions highlighting underused features. The goal of these sessions is to increase the value that publishers and editors receive from workflow deployments. This article focuses on some of the underused features discussed at the January 2017 User Group Meeting and provides links to the Aries Systems video library where available.

Make the Submission Interface Author Friendly: Customize the Author Main Menu

Usually, journals want to provide instructions to their authors—or even include additional links to copyright or competing interest forms. In this case, EM allows users to customize the author main menu. Users can opt for HTML to make the use of color and hyperlinks possible.

Choose the Information You Want to See When You Search and How It Is Displayed

Interactive PowerGrid

The best way to learn all about the PowerGrid (Figure 1) is to refer to our video, which demonstrates its capabilities. This feature offers a configurable grid interface. Users may resize, drag and drop, freeze, or hide irrelevant columns as well as deselect the function from the search criteria page or top of the folder if they prefer the old view. Any preferences changes made to the display of the PowerGrid are saved for the next time the Grid is accessed.

Saved Searches

It's also possible to save search criteria and re-run the same query whenever necessary from Search Submissions/Search Submissions (Production)/Search Proposals or Editor Main Menu > Search > Search Submissions.

The results page will show the infamous "floppy disc" icon that you can use to save the search. From here, decide whether it should show exclusively on the Editor Main Menu or choose to share the search with specific roles within the system by clicking "share search definition" from the Search Menu.

Tips and Tricks for Finding Reviewers

Reviewer Search Preferences

Editors are not always aware that it's possible with Reviewer Search Preferences to search a journal's entire reviewer database straight from the Reviewer Selection Summary page by selecting "from entire database" from the "Search

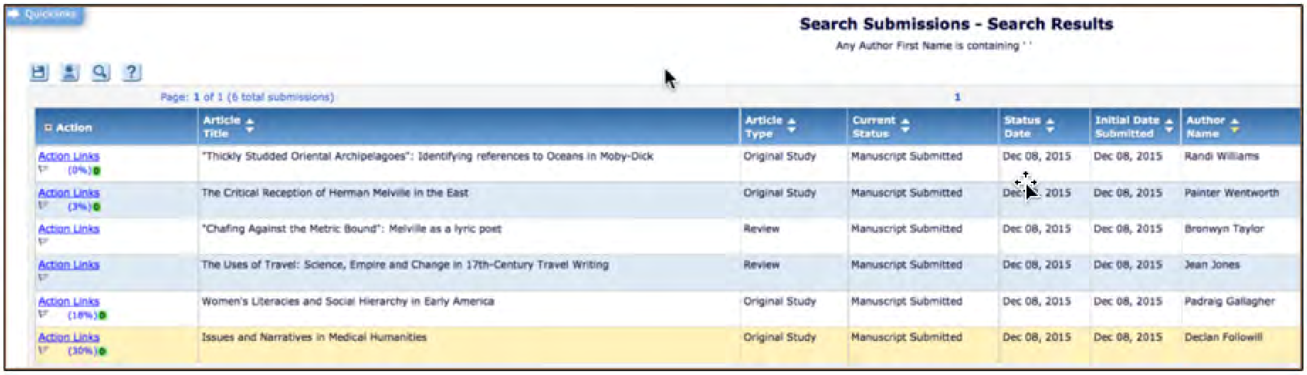

Figure 1

my publication" option bar. It's also possible to invite new reviewers right from this interface.

My Suggest Reviewer Preferences

EM can be configured to suggest qualified reviewers for invitation based on criteria set on an editor-by-editor basis. This is set up using the "My Suggest Reviewer" preference links available on the Reviewer selection summary page and the Suggest Reviewer results page.

Here, a user first identifies what kind of users should be excluded from the list of possible reviewers (based on criteria such as institution, city, or availability), and then defines the order in which those results should display, such as by board membership or the number of pending reviews.

My Reviewer Display Preferences

Editors can also customize the reviewer search for their own profile using My Reviewer Display Preferences. For example, an editor can specify that a reviewer's areas of expertise (classifications) should be displayed when viewing a list of potential reviewers on the "Select Reviewer" page.

This can also be configured via the reviewer selection summary or suggest reviewer results pages.

Classifications can be displayed to suppress classifications of reviewers, show the full list of classifications for each person (including highlighting matches with the manuscript), or to show only those matching with the manuscript.

On the second half of the page, users can define the "order" in which those reviewers should be displayed based on their review rating or number of matches to the manuscript.

Are You Confident That Your Double-Blind Peer-Review Process Is Working as It Should?

The Editor Access to the Reviewer PDF option (Figure 2) is primarily helpful for publications that operate using double-blind peer review or that require corresponding authors to attach confidential files to their submissions.

The PDF sent to the reviewer can be configured in Policy Manager to exclude specific manuscript components to make sure only the relevant files are displayed to the reviewer. This can be done by selecting "exclude from PDF" on the edit article types page.

In addition to this, a permission in RoleManager for editor roles—"view reviewer PDF"—will give editors the option to view the reviewer PDF via the "view submission" link from their normal action list, so they can be absolutely sure the reviewer's manuscript is fully anonymized.

Figure 2

An Easy Way to Manage Correspondence Sent Outside the EM System

The Email Ingest service (Figure 3) allows users to simply forward correspondence to an email address set up for this purpose, and EM will use a unique EMID code included in the subject line to add the email into the manuscript history of the relevant submission.

When this is configured, once the editorial offices ensure the EMID (a unique code appended to the subject line of an email) is intact, they may then forward it on to the journal's unique email address, prompting ingest.

Editorial Manager Functions That Could Save You Time and Money

Editor Discussion Forums and Reviewer Consultation

Editorial Manager has two functions, Editor Discussion Forums and Reviewer Consultation, that can be used to aid triage of an article or to request feedback from other editors or invited reviewers regarding a submission.

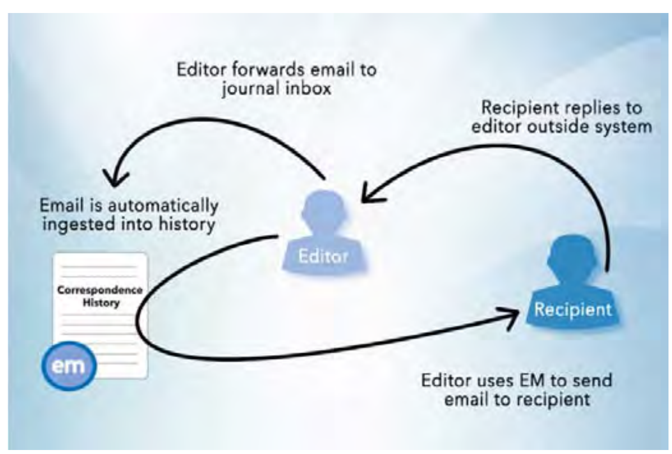

Figure 3

Once set up, an editor discussion forum can be initiated at any point in the workflow, adding no delay to the editorial or production process. Multiple discussion topics for editors can be created for each submission if needed.

Reviewer consultations are initiated automatically—with the manuscript's editors already added to it. Reviewers are then added when they agree to review—but are not able to access and comment as part of the consultation (via their "Completed Reviewer Assignments" folder) until after they've completed their review.

From here, reviewers can view other reviewers' comments (and names with the appropriate settings), adding their own comments to those associated with the consultation already.

Permissions are used to manage and initiate forums and, optionally, to invite additional specific editors to comment on individual manuscripts as needed (to both forums and consultations), allowing you to provide access to specific files, reviews, and information to editors who are not handling the manuscript.

Submission Item Metadata

Creating submission item metadata is a way to produce metadata/XML, which specifically tags information about specific submission items such as figures and tables. These fields are created to be associated with a specific Submission Item Family (such as the "Figure Number" field—which can be created and be associated with the "Figure" Submission Item Family).

These can be laid out in a specific order, can be set to be completed by the authors during submission (to capture things like a figure legend), and/or can be made editable on the transmittal form so that it can be amended before processing to production.

Set File Size Maximum

If you're trying to keep your site load times swift and manage your data/traffic charges, you can limit the file size that users are able to upload to the system.

Once a whole number (integer) limit is decided on, that should be applied on a per-file basis (whether or not the file is built into a PDF). Leave this field blank if not enforcing a limit.

This function is configured via the Policy Manager section of the System Administration. Simply go to "Submission Policies" and click on "Set Maximum Size of Uploaded File" to enforce a file size upload maximum.

You can still track usage by running a report found in Admin Manager entitled, "View File Upload/Download Statistics." This report shows the number and total size for all uploaded and downloaded files over a specified time period.

Dealing with Large Files or Data Sets

URL/URI – External Resource Submission Items

The External Resource Submission Item option allows authors to enter a URI/URL address or external resource location (*i.e.*, FTP) for accessing larger data sets (such as from institutional repositories often housed at universities and other scientific institutions) or other data (such as videos) accessible via the Internet.

Editorial offices will need to configure the "URL/URI/External Resource entry" setting to make entering this information optional or required for the submission item type in Policy Manager.

If an item is configured for the PDF Handling method "Build Hyperlink to the Item into the PDF," the name of the item is shown at the top of the page in the PDF, followed by the full URL of the item as a hyperlink on a new line.

Managing ZIP Files

Authors may well compress their files (into ZIP or archive format) for easy transfer from system to system. If an author uploads an archive file (*e.g.*, ZIP file) directly to the system, it will automatically unpack the files, number them, and give the author an opportunity to select the appropriate submission item type such as manuscript, figure, table, and description as needed.

But if you'd like the archive to be accessible via the PDF for review, you can hyperlink to it by editing that submission item to "Build hyperlink to the item into the PDF (Item not displayed in PDF)." With this setting, the system will include a link to the whole archive file, rather than attempting to unpack it.

This is also a way that editorial offices can process files that won't build into a PDF or allow reviewers and editors access without first downloading the programs needed to open these very important files.

I hope I've been able to provide you with some time-saving tips.

Where relevant, the links in this article lead to selections from Aries Systems' video library, which will give you an overview of each of these features. *For more information,* reach out to Aries.

This article was adapted from a presentation given at the 14th Annual European Editorial Manager User Group Meeting.