Brief introduction to Editorial Manager (EM)

Essential information for editors

2020

Contents

Introduction

- This slide deck has been put together to assist you with the transition to Editorial Manager (EM).

- Please note that the deck is meant only as a brief introduction to EM and is not considered a replacement for training. Please do sign up for one of our invaluable training sessions as and when you can - further details can be found on slide nine.

- Some slides will contain a hyperlink to video guides relating to content of the slide. These short videos (3 - 4 minutes) cover only the specific topic mentioned in the slides and, as such, provide a useful resource.

- If you have any further questions relating to the content of this deck or the migration please contact your Publisher or Journal Manager.

But first…why are we upgrading to EM?

- EM is a long-established and best-in-class editorial submission and manuscript processing system, providing a strong performing and robust system for Elsevier's and our society partners' Editors, Authors and Reviewers.

- All key workflows are already supported and operating successfully for more than 7,000 journals across publishers on EM. Your journal will benefit from this critical functionality immediately, and we will be able to deliver enhancements and innovative solutions to you, and your community, sooner.

- EM is not new to Elsevier; Elsevier and Aries Systems, the creators of EM, have already worked closely for nearly 20 years, with a number of Elsevier journals using EM, and the Elsevier Editorial System (EES) being adapted from an early version of EM.

What benefits does EM offer?

Workflows e.g. Editor Chains and features e.g. Quick Search to help **save editors time**.

Features to **help all users keep on top of their work** e.g. Editor Signposting for editors.

Features that **support enhanced communication** e.g. Discussion Forum and Decision Phrases.

Research integrity features to support both editors e.g. duplicate submission check within the journal on title and abstract as well as author name, and authors e.g. co-author confirmation.

Enhanced submission workflows and features e.g. support for metadata extraction and reference linking from submitted Word files.

Existing integration with many third-party tools e.g. CrossCheck, with more being established all the time.

Important workflow differences between EM and EES & EVISE

Many of the EM features and the functionality are similar to the ones on EES; EM has more differences as compared with EVISE and the next few slides will highlight some workflow changes you need to be aware of

Important workflow differences in EM

Send back to author

- Submissions can only be "Sent back to author" at the start of the workflow. This option is intended to be used where submission requirements have not been met (e.g. abstract length or structure, missing highlights, etc.)

- A submission cannot be "Sent back to author" once it has been assigned to an Editor. This includes the case where an Editor uses "Assign to myself" in Direct-to-Editor workflows.

- A "Revise" decision will need to be made to send a submission back to the author post-assignment.

Revised submission assignment

- By default, revised submissions will follow the same assignment workflow as new submissions although, where a CRO exists, they may choose to assign these differently.

- There are two options that allow for semi-automation of this process:

  - Allow reassignment to previous Editors

  - Revisions are automatically directed to the First Assigned Editor of the previous version

Next steps for migration

Downtime whilst your journal migrates
We will be adding a banner to your current editorial site to advise of
a period of downtime whilst we migrate to EM.

Data migration
We will perform a full data migration which ensures a seamless transition.
Your journal configurations and settings, inflight submissions and historical editorial data, reviewer and author databases will <u>all</u> be migrated to your new EM site.

EM letters
If your journal migrates from EES, the EES letters will be migrated over to EM. If your journal migrates from EVISE, it will adopt the EM default letters. You can always discuss any customizations you wish to make to these letters with your Publisher.

Go live
- Once the migration is complete you will be able to start working exclusively in EM immediately.
- Upon go live, all users (editors, reviewers and authors) will be informed and provided with instructions on how to access the new site. Please look out for this email on the day of go live.
- Ensure to complete your registration ASAP so that you can continue your work.

Editorial Manager training

We offer the following types of training sessions:

- **1-to-1 session:** trainer will guide you through EM covering how to manage a new assignment to making a final decision.
The one-hour session is comprehensive and covers the main features needed to prepare you for 'day one' on the new site. We recommend booking this as close to go live as possible to enable you to start working in EM when your site goes live.

- We also provide **recorded sessions** for lower volume users. These are available from the [training calendar](#).

- **Q&A session:** a bespoke session to answer any questions you may have and a chance for further guidance using the system. This session can be booked anytime after go live, however we would advise this is done within a few weeks of the go live date.

- Trainers are available across a variety of time zones
- Select a suitable slot from our online [training calendar](#)
- Importantly, the training can be tailored to meet the needs of your journal, e.g. we can organise a session with multiple editors from your journal.
- When the trainer contacts you to arrange the session, do let them know if there are any particular topics you wish to discuss.

We found that editors who have attended a training session familiarise with EM quicker, and get more out of the new system. Here is what some editor had to say after the training:

"The training helped me raise new questions about the editorial process, in addition to clarifying how to navigate the system."

"I went from zero understanding of the system to confident in using it."

"Easy to follow and it will save me time compared to learning to use the new system on my own."

"The trainer understood my prior experience and did not go over aspects of the training that were unnecessary. My experience and time constraints were valued."

Editorial Manager support

- **Editor Quick Guide**, highlighting the Editor Key Tasks, is available from the Elsevier Support Center
- Further **FAQs** around performing activities in EM are also available on the Support Hub; you can search using keywords related to your query.
- **Videos**:
  - The Support Hub also hosts video guides in different languages
  - If you can't find the topic you are after, you can search for videos in the Aries Video Library.
- Researcher Support: you can contact support as follows:

Details available at the bottom of each support web page.
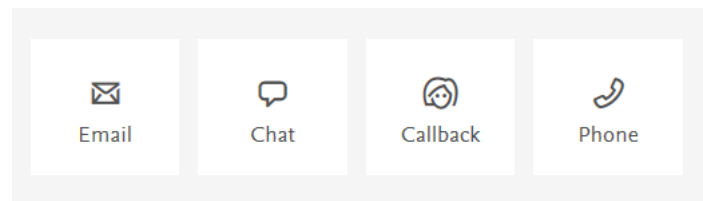
Editorial Manager **Video Guides**

Last updated on 06/02/2020 09.19 AM
Select the language below to see the **videos** available.

English

Discussion Forum in Editorial Manager 🔊

Invite New Reviewers in Editorial Manager 🔊

Making a Decision in Editorial Manager 🔊

Reviewer Invitation in Editorial Manager 🔊

Spanish

French

Email   Chat   Callback   Phone

Editorial Manager
Highlight Features

Editorial Manager Feature Highlights

1. Main Menu and Help
2. Submissions / Action Links
3. View Options / Power Grid
4. Duplicate Submission Check
5. Searching for Reviewers
   a. Alternative reviewers
   b. Reviewer reminders
6. Automatic Un-Assign Reviewer Settir
7. Re-open Review
8. Editor "Signposting"
9. Automated Summary Reminders
10. Discussion Forum
11. Quick Searches / Saving Searches
12. Author Interface

These features are covered on the next slides.

em **Editorial Manager**®

1. Main Menu and Help

- The "Help" link at the top will take you to EM's robust help documentation search
- Items needing your attention will be in your To-Do List

2. Submissions / Action Links

- Signposting carries through to each individual manuscript
- Clicking the "Action Links" brings up a menu of options, including downloading the files, reviewing the details, assigning to another editor, sending back to author, inviting reviewers, etc. (this menu will be different depending on your role within the journal)

3. View Options / Power Grid

- Columns are sortable.
- In several menus, you can also change the order of the columns by dragging and dropping them to a different location, or even turn certain columns off.

Power Grid

Power Grid is being rolled out across several different areas of Editorial Manager; primarily useful when Searching Submissions, as searches can be saved and results downloaded.

4. Duplicate Submission Check

submission. The EM Duplicate Score is the highest weighted average for any of the submissions displayed below.

Potential Duplicate Submissions

EM Duplicate Score: 14%

Manuscript/Submission Number	Initial Date Submitted	Revision	Current Status	Article Title	Authors	Article Title Similarity	Author Similarity	Abstract Similarity
RHISPH_2016_99 View Submission Details	07/12/2016 09:33:07	0	Completed - Reject	Assessment of Plant Growth Promoting Potential of Pseudomonas putida Isolated from Rice Rhizosphere of Old Alluvial Soil Zone	SHAMPA DUTTA;narayan mandal;Jayanta Datta	29%	0%	9%
RHISPH_2018_49 View Submission Details	05/01/2018 11:27:55	0	Completed - Reject	Plant probiotic rhizobacteria from various medicinal plants and its effect on enhancement of agricultural productivity	Reshma K R;Jimtha Joseph	17%	0%	24%
RHISPH_2020_1 View Submission Details	01/03/2020 04:33:12	0	Completed - Reject	Assessment of potential bacteria for enhancing plant nutrient uptake and growth of wheat	Qurban Ali Li Panhwar;MS Jamali;MS Sarki;Inayatullah Rajpar;N Depar	25%	0%	15%
RHISPH_2018_98 View Submission Details	08/21/2018 19:52:30	0	Completed - Withdrawn	Maize plant growth response to whole rhizosphere microbial communities in different mineral N and P fertilization scenarios	Dante Lopez-Carmona;Alejandro Alarcon;Esperanza Martínez-Romero;Juan Jose Peña Cabriales;John Larsen	25%	0%	13%
RHISPH_2018_151 View Submission Details	11/11/2018 20:08:47	0	Completed - Accept	Maize plant growth response to whole rhizosphere microbial communities in different mineral N and P fertilization scenarios	Dante Lopez-Carmona;Alejandro Alarcon;Esperana Martinez Romero;Juan Jose Peña Cabriales;John Larsen	25%	0%	10%
RHISPH_2019_89 View Submission Details	07/13/2019 15:13:29	0	Completed - Reject	Plant growth promoting potential of multifarious endophytic Pseudomonas	Rajat Maheshwari;Namita Bhutani;Pradeep Kumar;Pooja Suneja	25%	0%	11%

5. Searching for Reviewers - intro

There are various internal and external 'find reviewer' options; these will be covered on the next few slides.

- Use **Search My Publication** to search for reviewers in the journal database.
- Select **Search using - Reviewer Recommender** to get suggested reviewers from an algorithm using Scopus data combined with information on reviewers in the journal database.
- Access the **Standalone Find Reviewer Tool** to search Scopus using your own chosen keywords and then copy-paste the information back.

Pease visit our Support Hub for information on finding reviewers, or contact Support.
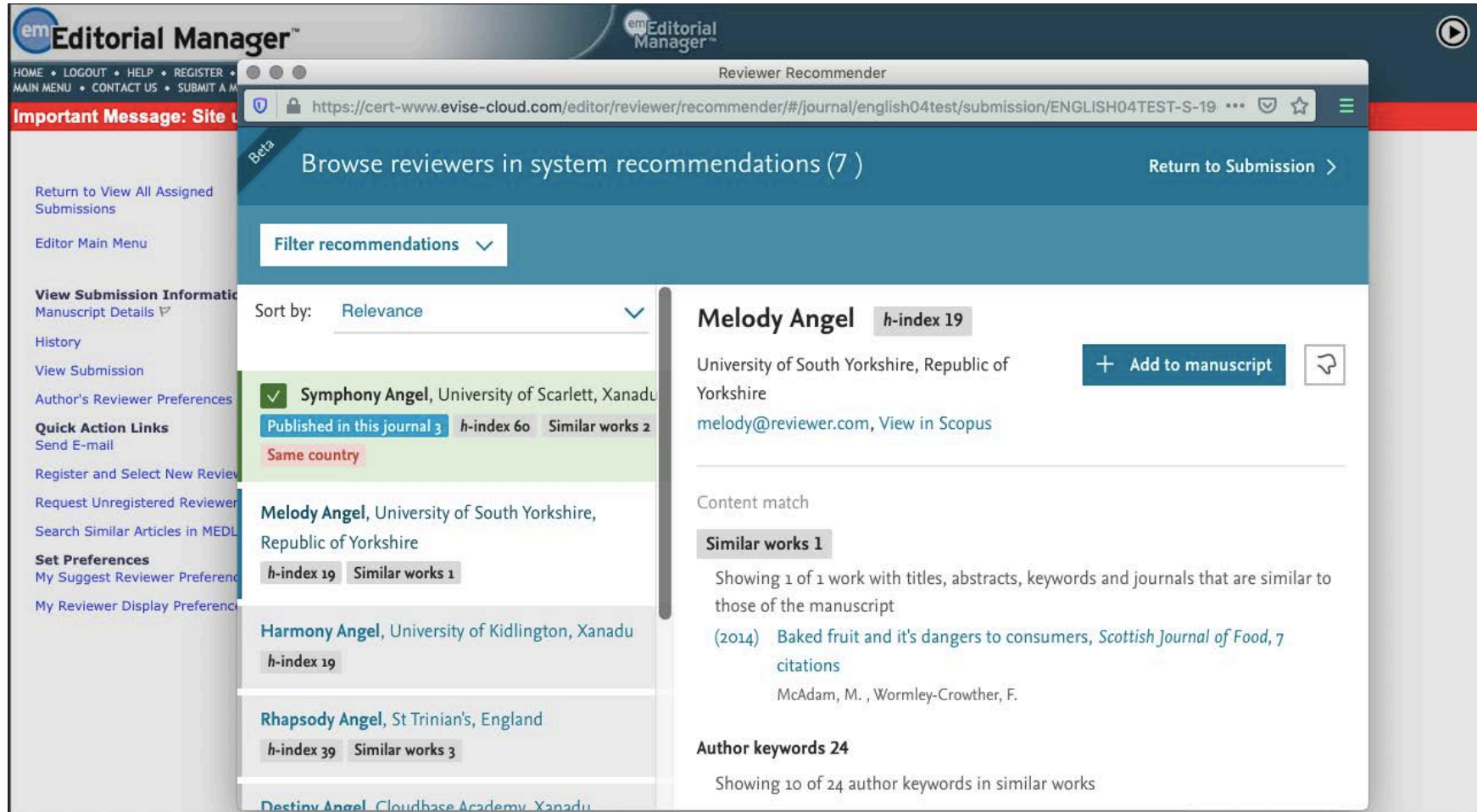
Reviewer Search

⦿ Search My Publication Search for Reviewers ▾ from All Reviewers ▾ Go

◯ Search using - Reviewer Recommender

Searching for Reviewers: Reviewer Recommender tool

- Search for reviewers external to the journal database using the Reviewer Recommender (RR) tool, which is similar to the EVISE Reviewer Recommender

- The RR only generates recommendations for manuscripts that have manuscript keywords associated to it

- Editors need to be logged in with their Elsevier Profile to be able to see more information about potential reviewers and their published articles in Scopus

- The RR uses submission meta-data to identify potential reviewer candidates, who are then ranked using a machine learning model. The (meta) data from EM is used to:

    - Select up to 1,000 researchers authoring similar papers

    - Filter out the researchers with potential conflicts of interest

    - Rank and display the top 100 candidate reviewers

    - Enrich the recommended candidate reviewers with additional information (e.g. publication history, reviewing history for the journal ,reviews in progress, etc.)

- The RR will start generating recommendations as soon as the author completes the submission process and those recommendations will be available in EM within 24 hours.

- A [video and Quick Guide](#) showing how to use the RR tool is available from the Support Hub

Reviewer Recommender

A video on the Reviewer Recommender tool can be watched here.

Searching for Reviewers: other sources

- Search the journal database by using the 'Search My Publication' box in EM. To assist editors in finding suitable reviewers, we have automatically added some personal keywords to the reviewers' profile based on their past publications available on Scopus.com and their activity within this journal.

- The Find Reviewer (FR) tool is available as a standalone tool. It can be used to search for reviewers by copying and pasting 'Keywords', 'Title', 'Classifications', 'Author names' etc. Details of reviewers you would like to invite need to be copied from the FR tool back into EM.

- Depending on the journal configuration, you can search for Similar Articles on Scopus (a keyword-based search), Scopus Author Search, Similar Articles in MEDLINE, and PubMed Title Search. These options are listed in the action menu on EM.

5a. Alternative Reviewers

- You can add alternate reviewers up-front to act as a replacement for any reviewers that decline or fail to respond. You can link a specific alternate to a reviewer, to ensure you have at least one particular reviewer in a particular domain

- The system automatically promotes the (linked) alternate if one of the invited reviewers declines an invitation

Alternates: part of the Reviewer Invitation video guide:
https://service.elsevier.com/app/answers/detail/a_id/29504/supporthub/publishing/

5b. Reviewer reminders

- Automatic reminders will not be automatically migrated to the new EM site

- These reminders will be set by your Journal Manager upon migration (after the site goes live in EM)

- If you did not have automatic reminders switched on previously, then you do not need to have these in EM, although they can be introduced should you wish to

- You can discuss with your JM the different deadlines for reminders and these can be adjusted at any time

6. Automatic un-assign review setting

- Reviewers who have already accepted the invitation to review a paper but do not submit their comments within a pre-defined time, can be automatically un-invited

Review Settings

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 2 [Change] review(s) have been completed.

Automatically un-invite Reviewers who do not respond to an invitation within 5 [Change] day(s). (more...)

Automatically un-assign Reviewers who do not complete a review within 0 [Change] day(s) of the review due date.
Set this number to 0 to turn off the automatic un-assign process for Reviewers who have accepted an invitation to review this submission. (less...)

7. Re-open Review

- In EM, you will have the ability to "re-open" a review. This option appears when viewing a completed reviewer report and allows the editor to return the report to the reviewer for editing.

- Once the review has been re-opened, the status for that report on the View Reviews and Comments screen will change to Partial Review Saved, and the Reviewer will see the assignment back on their Reviewer Main Menu for editing/re-submission in the My Pending Assignments folder.

8. Editor "Signposting"

- Color coded signposting indicates submissions in each section that are new (green), need attention (amber), or overdue (red)
- These thresholds are configurable, and can be changed after migration

Editor Signposting: https://vimeo.com/album/3537271/video/217036720

9. Automated Summary Reminders

- Reminder emails can be sent automatically to you at regular intervals.

- These reminders can include summaries from up to 11 assignment-related Editor Main Menu folders compiled in a single email.

- May be configured to include due-date threshold information (color-coded), allowing you a more informative quick view of your workload.

- Assignments that are on schedule are marked green, those requiring attention to keep them on schedule are marked amber, and those that are late are marked red.

- You will have the ability to configure these, but Journal Manager or Dedicated Support Agent can discuss any specific concerns.

Dear Sam,

Here's a summary of various folders from your Editor Main Menu. Folders marked with red or amber require attention.

Folder Summary as of March 3, 2017

New Invitations (2)
New Assignments (1)
Submissions with Rescinded Decision (1)
Submissions with Required Reviews Complete (7)
Submissions Requiring Additional Reviewers (4)
Submissions with One or More Late Reviews (2)
Reviewers Invited - No Response (11)
Submissions Under Review (14)
Group by Editors I Assigned (2)
Group by Editors with Current Responsibility (2)
Group by Manuscript Status (2)

You may click this link to log in and go to your Editor Main Menu: Editor Main Menu

Regards,
ACME Journal

10. Discussion Forum

- Discussion Forums allow you to invite other editors to view and discuss a manuscript, without having to assign it to them. Once the discussion is complete, the editors' access to the manuscript can be terminated.

- By default all you will have the ability to *initiate* a Discussion Forum and all editors will be eligible to be *invited* to participate. Discussion Forums have many options, and these can be amended as needed after go-live.

- Please note that when starting a discussion you are advised to sort the list of potential based on the number of 'Current Assignments' being handled by each user as per below. This is because the list will contain a large number of support users, this issue is being addressed and the solution will only be a temporary requirement.

Page: 1 of 35 (348 total candidates)   1 2

Select	Editor Role ▲▼	Editor Name ▲▼	Current Assignments ▲▼	View Reviews and Comments
✓	Receiving Ed/Office		91	
☐	Associate Editor		6	☐
☐	Editor		5	☐
☐	Associate Editor		3	☐
☐	Associate Editor		2	☐

My Pending Assignments (5)

  New Assignments (4)

  Submissions with Required Reviews Complete (1)

  Submissions Requiring Additional Reviewers (0)

  Submissions with One or More Late Reviews (0)

  Submissions with Active Discussions (1) ❶

Video tutorial: https://service.elsevier.com/app/answers/detail/a_id/29500/supporthub/publishing/

Discussion Forum - screenshot

11. Quick Searches

When you complete a search you can choose to save the search by clicking the floppy disk icon in the far left hand side of the search results screen. It will then appear as a link on your home page in the left hand side as shown below. This search is not static and will pull in additional papers with the search criteria chosen in the search if clicked on in the future.

12. Author Interface

- EM offers a user friendly author submission interface.
- If features the automatic extraction of data from a Title Page or Manuscript File (etc.) to auto-populate certain fields so authors can save time and there are clear warning signs for skipped mandatory items.
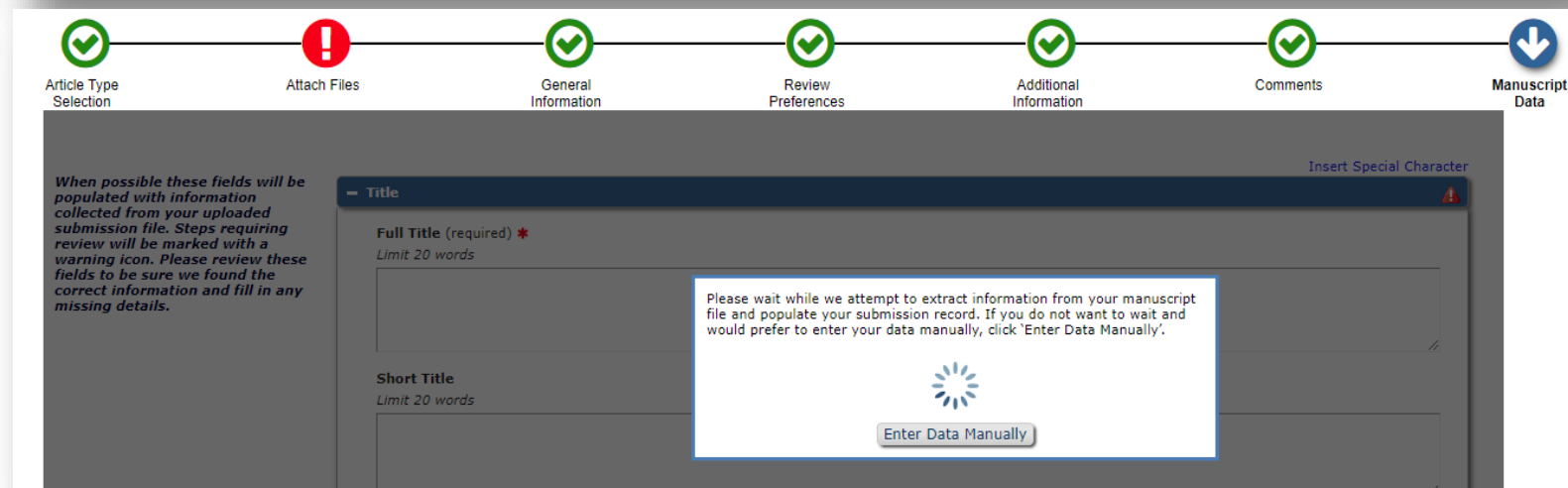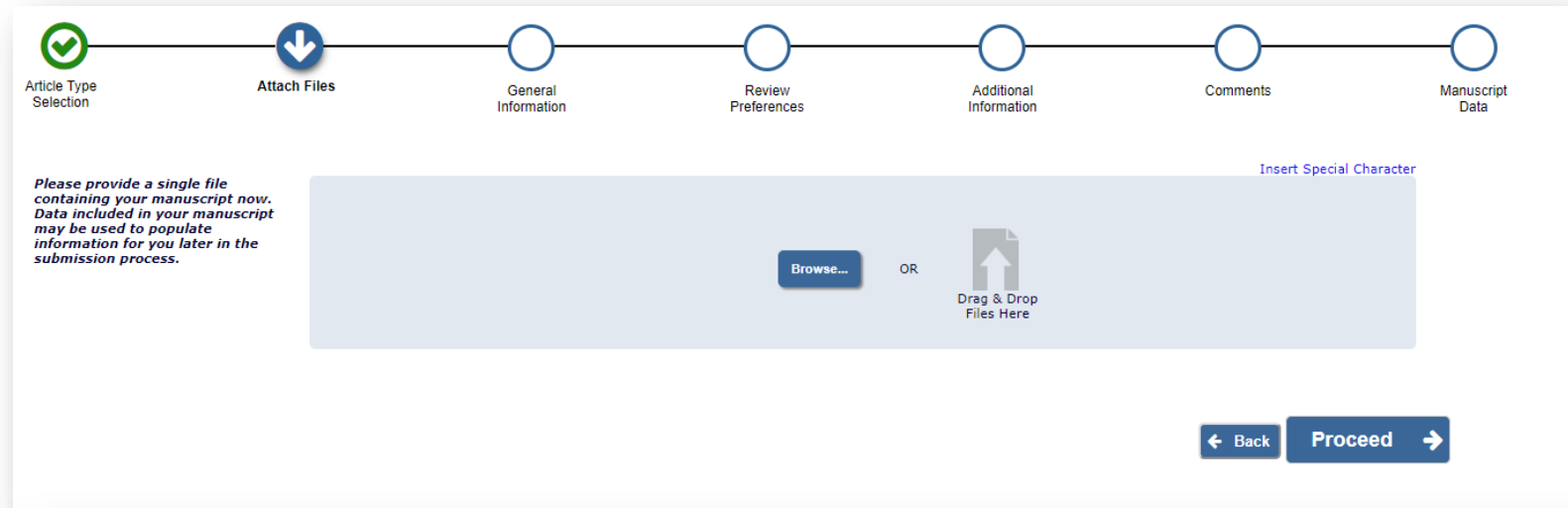
After care

Event	Time/trigger
JM begins the Go-Live Checklist	Within 24-48 hours of being copied on the Go-Live notice
JM sends first Aftercare communication to Main Editor(s)	Within 24-48 hours of being copied on the Go-Live notice
JM sends Check-ups to the Main Editor(s).	**EVISE -> EM** Every 2 weeks until aftercare is ended **EES->EM** Every 4 weeks until aftercare is ended
CSAT survey is sent to editors	4 weeks post Go-live 12 weeks post Go-live
JM sends proactive communications to additional editors	2 weeks post Go-Live 6 weeks post Go-Live 12 weeks post Go-Live
JM handles any editor Responses to Aftercare Communications	As responses are received from any proactive email
JM handles any Aftercare CSAT Survey responses	As responses are received from 4 week and 12 week surveys
JM closes aftercare	When all exit criteria are met, or after 16 weeks with TM agreement

Throughout the migration period, you are supported by the Journal Manager as per usual. The aftercare process runs for 16 weeks after go-live, during which the Journal Manager will be in touch with you during the aftercare events listed on the left.

Finally

- Make sure to book a [one-hour a training session](#)
- Use the [Editor Quick Guide](#)
- Contact your Journal Manager and Publisher if you have any post go-live configuration requests

Note that your journal site, including submission data and configuration, is transferred to EM via an automated data migration process. The Migration Lead does not configure it; therefore, it is likely that some adjustments may be needed once the site is live. This is the Journal Manager's responsibility. You are encouraged to flag-up any configuration tweaks that need to be made to the Journal Manager after go-live

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