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Introduction
This manual is intended for journal editors. It contains step-by-step instructions, illustrated with screenshots where necessary. You need not necessarily read this manual front to back: By clicking on an entry in the Table of Contents you go straight to that section. Cross-references to other relevant sections have been included throughout the text in yellow highlights; click on the section number in these cross-references to go to the corresponding section. You can also do free-text searches in this PDF (CTRL + F in Windows; Cmd + F in Mac).

Please note that depending on your journal’s workflow, not all options may currently be available to you. Should you have any questions or wish to activate new features for your journal, please contact our EM Support Team at EM@brill.com. Please also have a look at our dedicated online support page, which contains additional information, such as instruction videos and a Frequently Asked Questions document.

1. Getting Started

1.1 System Access: Login

Go to your journal’s Editorial Manager website, enter your username and password into the appropriate fields in the login section and click on ‘Editor Login’. The first time you log in you will be prompted to change your password (for security reasons). After having done so, you will see your editor’s main menu, from where you can take action as and when necessary. Please note that editorial passwords should contain min. 8 characters and should be alphanumeric.

1.1.1 Retrieving and Resending Access Codes
Should you have forgotten your username and/or password, click on Send Login Details in the login box. On the next page, enter your first name, last name and email address and click on ‘Send Username and Reset Password’. You will then receive an email with temporary access codes. Every time your password has been reset, you will be prompted to change your password upon first login. Please note that editorial passwords should contain min. 8 characters and should be alphanumeric.

Should an author or reviewer ask you to resend his/her access codes, you can look up the person through Search People in your main menu (‘Search’ section at top of the page; see section 2.2), click on the person’s name in the search results and then press the ‘Send Login Details’ button on the left.

1.1.2 Login via ORCID
ORCID (Open Researcher and Contributor ID) is an initiative that allows researchers to obtain a unique personal identifier code that can be used to link their publications unequivocally to their person. This way, you can avoid confusion as to whether or not a publication is indeed yours or someone else’s. For more information on ORCID, see http://orcid.org/.

If you wish, you can log into EM using your ORCID access codes. To do so, click on the green ORCID ‘iD’ symbol in the login box.
If you do not have an ORCID iD yet: Create an ORCID iD via the Register link on the ORCID page. On the next page, enter the requested information and click on 'Authorize':

If you already have an ORCID iD: Enter your ORCID access codes and click on 'Authorize':

After authorization on the ORCID page, you will be led back to Editorial Manager, where you should then log in with your Editorial Manager login codes (in order to connect your ORCID iD with your Editorial Manager account):
NOTES:

- This only needs to be set up once. Next time you log in, simply click on the ORCID iD symbol, fill out your ORCID access codes and 'Authorize' to access EM.
- If you are logged in as an Author by default, click on Update My Information at the very top of the EM page, select your editorial role from the 'Default Login Role' drop down menu and click on 'Submit' at the bottom of the page. Next time, the system will log you in as an editor.
- To switch to your editorial main menu without logging out and logging in anew, open the 'Role' drop down menu to the right of the Journal Title at the very top of the page and select your editorial role.

1.2 Menu Bar and Navigation

The dark blue navigation bar at the very top of the page (directly below the journal’s title) is always visible in EM. The most useful option here is Main Menu: this always leads you back to your editorial main menu (see section 3). The other links are as follows:

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>This leads to the EM homepage where you usually log into the system.</td>
</tr>
<tr>
<td>Log In/Log Out</td>
<td>Log Out allows you to exit the system. When you are in proxy mode (see section 2.2.2), click on this link once to exit proxy mode and return to your own account. Log In leads to a separate login page where you can log into the system.</td>
</tr>
<tr>
<td>Help</td>
<td>This opens an extensive Help feature in a new window. Here you can find detailed instructions on how to perform all possible actions in the system. The EM homepage also includes direct links to BRILL’s EM resources (e.g., this manual).</td>
</tr>
<tr>
<td>Register</td>
<td>Register is intended for new users who wish to create an account. Registration need only be done once. Editors can disregard this link. Should you wish to add someone to the database, use Register New User instead (see section 1.3).</td>
</tr>
<tr>
<td>Update My Information</td>
<td>After login, this is where you can make changes to your own account (update your contact information, change your username/password, etc.).</td>
</tr>
<tr>
<td>Journal Overview</td>
<td>This opens the Publisher’s homepage of the journal.</td>
</tr>
<tr>
<td>Contact Us</td>
<td>This opens a new email to the editor(s).</td>
</tr>
<tr>
<td>Submit a Manuscript</td>
<td>Please disregard this link.</td>
</tr>
<tr>
<td>Instructions for Authors</td>
<td>This link opens the Instructions to Authors as published on the Brill website.</td>
</tr>
</tbody>
</table>

1.3 Register New User: Adding People to the Database

Register New User is available at the very bottom of your Editor Main Menu and allows you to add new people to the database:¹ Click on the link, enter the requested information (Email address, Given/First Name, Family/Last Name, Title and Country). If you wish to enter more contact details, click on the ‘+’ symbol in front of ‘Enter More Contact Information’. When ready, click on ‘Register User and Send Letter’ or on ‘Register User and Do NOT Send Letter’. The former option entails that the user receives an (editable) notification that (s)he has been registered in the system with his/her access codes. With the latter option, the user is registered in the system, but will not receive separate notification about this. Registering new users can also be done via Search People (see section 2.2) and when you are inviting referees (see section 3.3.1).

If you wish to submit an article on an author’s behalf, you can do so via the proxy option (see also section 2.2.2). When you need to register the author first because (s)he did not yet have a user account, you will be able to enter proxy mode immediately after having registered the author (click on the ‘Author’ text).

¹ Label changes depending on whether or not you are logged in.
² All authors and reviewers (as well as editors) who need to do something (e.g., submit a manuscript, submit a review, etc.) will need an account in EM. This account will only need to be created once.

Last revised: 30 May 2017
1.4 System Emails

EM sends email notifications whenever something happens in the system. The Editor will for instance receive an email alert whenever an author submits a new or revised manuscript, whenever a reviewer agrees or declines to review, submits a review, etc. The system also sends automated confirmations of receipt to authors (for new and revised submissions) and reviewers (for agreeing/declining to review, and for submission of the review). Whenever you take action as editor, e.g., submit a decision, invite reviewers, there will generally be an email communication connected to this action. When taking action in EM, keep an eye out for the ‘Customize’ / ‘Send Custom Letter’ options: these will allow you to view and edit the letter before it is sent. If you want to make permanent changes to (some of) the default letters (rather than making changes on a case-by-case basis), please contact EM Support.

2. Search Functions

In EM you can either search for submissions (manuscripts), or for people (authors, reviewers, editors). Both options are available at the top of your main menu page in the form of clickable hyperlinks.

2.1 Search Submissions: Searching for Manuscripts

Via Search Submissions you can look up all the manuscripts that are in the system based on a variety of search criteria. By default, the system searches on manuscript number.

You can, however, also conduct manuscript searches on authors’ names, article titles, article types, etc. All you need to do is change the ‘criterion’ in the drop down menu ( signifies and opens a drop down list in EM) on the left before executing your search. In the value field (on the right) you can fill in the exact information to be searched (e.g., the actual author's name). Make sure that the type of information you enter as ‘Value’ matches the type you selected as ‘Criterion’ (e.g., to look up a paper by the author's last name, make sure to select for instance, ‘Any Author Last Name’ from the drop down menu). Execute the search by pressing ‘Search’ or use the ‘Enter’ key on your keyboard. You will then get a list with all manuscripts in the system that meet your search criteria.

3 Only if you are the editor who receives these directly from the author.
You can do combined searches by using multiple search criteria (e.g., all manuscripts written by ‘Smith’ and accepted after date x): Use the ‘add’ button on the right to add extra search fields. You can add as many additional search lines as necessary. Use the OR/AND drop down at the right to indicate how the search options should be combined.

| Criteria                  | Any Text Containing | Selector | Score | Value | | |
|---------------------------|---------------------|----------|-------|-------|------|
| Any Author Last Name      | [ ]                 | [ ]      | [ ]   | [ ]   | | |
| Journal Title             | [ ]                 | [ ]      | [ ]   | [ ]   | | |
| General Meta Date         | [ ]                 | [ ]      | [ ]   | [ ]   | | |

Search results are shown in a table overview. For a new search, click on the looking glass symbol (🔍) left above the table.

To do the same type of search more often and create a direct search link in your main menu click on the Save icon (▲) in the search results (left above the manuscript table), type in a short name for your search into the ‘Search Criteria Name’ field, tick the ‘Show this search in Main Menus’ box and click on ‘Submit’. The short name you filled out will show up as a quick search link on the left in your main menu and will give you real time search results.

NOTES:

➢ For a list with all manuscripts in the system, set the search criterion to ‘Corresponding Author Last Name’, enter a single space into the ‘Value’ field and execute the search.

➢ If the search value you entered may or may not contain special characters (e.g., ‘ì’, ‘é’, ‘à’), please replace those ‘possible special character’ letters with a percentage sign (%; e.g., ‘Garc%a’); the system will then list all possible variations in the search results.

➢ It may well be that you have only been given access to the submissions that were sent to you for processing. In that case, any submissions that have not been assigned to you cannot be found through this search option.

2.2 Search People: Searching for Information about Authors, Reviewers, Editors

Search People in your main menu gives you access to the people database of the journal. You can do all sorts of searches, the default one is by last name. Simply enter a name (or other information that matches the criterion you have selected from the drop down menu on the left) and click on ‘Search’ (or use the Enter key on your keyboard). The system will then show all people that meet the criteria you have searched for directly below the search grid. The search results allow you to do various things, such as viewing and updating someone's contact information, taking action someone else's behalf or merging duplicate records, all of which are explained below in more detail. Should the person you were looking for not have an account in the system, you can create a new account through Register New User at the top right (above the ‘User Role’ drop down menu).
NOTES:
- For a list with all people in the system, set the search criterion to ‘Author Last Name’, enter a space into the ‘Value’ field and execute the search.
- If the search value you entered may or may not contain special characters (e.g., ‘í’, ‘é’, ‘â’), please replace those ‘possible special character’ letters with a percentage sign (‘%’; e.g., ‘Garc%aa’); the system will then list all possible variations in the search results.

2.2.1 Access to Contact Information, Notes, etc.
All personal names in the search results are in fact clickable hyperlinks.

![Search Results Table]

Click on a link to access that person's database record. You can then view and, if desired, change the information about that person, e.g., contact details, reviewer access (reviewer role drop down menu at the top), and any confidential editorial notes about that person (‘People Notes’ at the bottom). Anything entered into the ‘People Notes’ text box at the bottom of this page will also be visible when inviting referees (see section 3.3.1). Click on ‘Submit’ at the bottom of the page to save any changes.

NOTES:
- In general, letters sent via EM use the information as stored in this people database (e.g., title, last name). It is thus very important that people are registered correctly. At the very least, the database fields ‘Title’, ‘First Name’ and ‘Last Name’ should be correct as these are commonly used in both the address and signatures of the letters.
- Whenever you see a personal name in the system that is hyperlinked, clicking on the name will give you quick access to the people notes as well as a variety of other details regarding that person.

2.2.2 Proxy Mode: Taking Action on Someone Else’s Behalf
In EM, there are four different role types: Author, Reviewer, Editor and Publisher. Per role type, it is possible to have multiple roles (e.g. within the ‘Editor’ type you may have roles such as ‘Managing Editor’, ‘Associate Editor’, ‘Co-Editor’, etc.). Permissions may vary per role. All people in EM by default get an ‘Author’ role; depending on what they need to do in the system (only be able to submit articles [Author], or act as a reviewer or editor as well), they may be given more roles. In the search results on the Search People page, you can see which role(s) someone has.

![Proxy Mode Table]

If any of the role names on the right are highlighted in yellow (as shown in the screenshot above), this means that you can ‘proxy’ for that person in that particular role: Click on the relevant role name (e.g., ‘Reviewer’) to enter the system for that particular person in that particular role. For instance, by clicking on someone's reviewer role, you will enter that person's reviewer menu and can then see and do exactly what that person can if he were to log on himself/herself. This proxy mode can be very helpful when you need to help someone; think for instance of a reviewer who has problems submitting his review. If you have the review comments, you can use the proxy mode to submit the review on the reviewer's behalf. While in proxy mode you will see a yellow banner at the top of the page, specifying for whom you are proxying. To exit proxy mode and return to your own account, click once on log out in the blue navigation bar at the very top of the page.
NOTES:
- You can also proxy via the Details action link of any manuscript, in which case simply click on the ‘Proxy’ text (highlighted in yellow) next to the name of the person you want to proxy for (author, editor, reviewer).
- If you first need to create an account (e.g., you need to upload a ms on behalf of a new author), you can enter proxy mode immediately after registration of the new user (see also section 1.3).

2.2.3 Merging Duplicate Accounts
When a person has multiple accounts in the system, you can merge these into one to avoid unnecessary confusion:
In the search results on the Search People page, simply tick the boxes in front of the records you wish to merge (max. 2 at a time) and click on ‘Merge People Records’ at the bottom of the page. This will lead you to the ‘Merge Duplicate Users – Verify Data’ page.

![Merge Duplicate Users - Verify Data](image)

Here you choose which record to keep by clicking on the appropriate ‘Combine and Keep this Record’ button. This might for instance be the record with the most recent address. When you merge accounts, the history and pending assignments of all records will be retained in the surviving account. After clicking on ‘Combine and Keep this Record’, you will first need to confirm your choice (click on ‘OK’) and then send the accompanying letter to the user (press ‘Send’; if you wish, you can edit the letter before sending).

3. Editor’s Main Menu (General Structure, Action Folders and Action Links)
Your Editor’s Main Menu (see screenshot above) will allow you to keep track of all papers under consideration for your journal and will indicate whether and what type of further action may be required. Your menu consists of several sections, each listing a number of action/status folders (the most important of these are described in the sections to follow and highlighted in the screenshot below).
If there are manuscripts for which the status described in the main menu applies (e.g., New Assignments, Submissions Requiring Additional Reviewers), the folder name will become a hyperlink and the number at the end indicates the number of manuscripts in the folder. Click on the link to see the manuscripts, get access to more detailed manuscript information and take action where necessary.
Throughout EM, the manuscripts (‘submissions’) are shown in a table format (one manuscript per row; the various columns give more information about the individual manuscripts). On the left hand side, each manuscript has an ‘Action’ column. The ‘action’ links give you access to more detailed information about the manuscript (e.g., Details, History, View Submission) and/or allow you to take specific action on the manuscript (e.g., Assign Editor, Invite Reviewers, Submit Editor’s Decision and Comments). The most important action folders and action links are described in more detail in the sections below.

You can change the look and sorting order of any manuscript table at any time and as often as needed. Click on one of the triangles in any column header to have the manuscripts sorted by the information displayed in that particular column (e.g., by status date in ascending/descending order).

Click on the ‘-’ or ‘+’ symbol in the ‘Action’ column to either collapse or expand the action links. If collapsed, instead of the full display of all links (as above) you will only see one link (Action Links) and you will need to hover over this link with your mouse to gain access to the individual links through a pop up:

On more and more pages, the overview table may look slightly different than you were used to before. This new page style allows you to customize the overview even further: The settings symbol ( above the manuscript table on the right) allows you to make changes to the various columns that are displayed on the page (add/delete columns): simply tick/untick checkboxes as appropriate and click on ‘Submit’ to save your changes.
You can also change the order of the columns: hover with your mouse over the column header you want to relocate until you see a drag-and-drop symbol (). Then press and hold your mouse button, and simultaneously move your mouse sideways to move that column to another location in the overview. Whilst you are pressing the mouse button, the name of the column you are relocating will be shown in a yellow popup and arrows indicate where the column will be inserted if you would release your mouse button at that point.

If you prefer the old-style overview, simply click on the toggle symbol (↔) at the top left.

NOTES:

➢ Depending on your journal’s workflow, you may have all or only some of the links described in the sections to follow.
➢ The available action links and status columns may vary per status folder.

3.1 New Submissions Requiring Assignment / Direct-to-Editor New Submissions

These are all new manuscripts that have just been received from the author and require further action from you:⁴ At this stage, the receiving editor generally does a quick check for a number of general and journal-specific technical requirements (e.g., check for conversion errors, completeness, proper anonymization, conformation to the journal’s Guidelines, etc.).⁵ The action links that are available for manuscripts in this folder are described below. Note that even if you are the only editor for the journal, the manuscript has to be formally ‘assigned’ to you before you can either send a manuscript for review, or submit a formal editorial decision (see section 3.1.9).

3.1.1 Duplicate Submission Check, Author Details and Green ‘D’ behind the Author’s Name

The system compares newly received papers with other manuscripts submitted via the journal’s EM site (within the last 365 days). This comparison is based upon article title, all authors’ names and abstract and results in the Duplicate Submission Check score: Next to the Duplicate Submission Check action link you get to see an overall score (e.g., 30%). If higher than 50%, this overall score will be displayed in red. Click on the link to access a detailed list with potential duplicates in the system, each showing the percentage of similarity in terms of authorship, article title and abstract. For those parts scoring more than 50% the score bar and percentage will be shown in red. It is of course up to you to decide whether there is indeed a problem (e.g., the same author submitting two entirely different papers would result in a 100% Author Similarity score so would not be a problem, while 80% similarity in abstracts may well be worrisome).

⁴ If for your journal papers are divided automatically between two or more editors, the link is called Direct-to-Editor New Submissions.
⁵ If you have an assistant or Managing Editor who usually does this initial check and only sends you the manuscripts after the check, (s)he will be the one with the New Submissions link in his/her main menu.
If you see a green ‘D’ (-dollar sign) displayed behind the author’s name in the manuscript table, this indicates that the author has submitted one or more other papers within the last 365 days. Clicking on the author’s name will open a new window providing a short overview of the author’s details, any editorial notes about that person as well as a list with all papers submitted by this person with this account.

3.1.2 View Submission: Access to PDF Version of the Manuscript

View Submission always opens a PDF version of the manuscript. The system has two different PDFs available: an Author/Editor PDF and a Reviewer PDF. When you click on View Submission you can choose which version to view.

The Reviewer PDF is the version that the reviewers get to see and tends to include less information than the Author/Editor version (e.g., the latter may include a cover letter that is excluded from the Reviewer PDF).

Please check whether all required elements are there and whether they have the correct label: Any parts labeled ‘Title Page’, ‘Cover Letter’ or ‘Supplementary Material’ in the Editorial PDF will not be visible in the referee’s copy; anything with ‘(Revised) Manuscript (anonymized)’, ‘Table’, ‘Figure’, ‘Response to Reviews’ labels will be included in the Reviewer PDF so these parts should not contain authors’ names or other clues to their identity (see also section 3.1.5). If anything is missing or if the author needs to attend to other technical points, you can return the submission to the author’s main menu via Send Back to Author (see section 3.1.7 below).

NOTE:
➢ To view the source files of the manuscript (e.g., Word file), use File Inventory (see section 3.1.5).

3.1.3 Manuscript Details: General Manuscript Information and Status

Click on Details for an overview of all sorts of information about that particular paper, including an option to store confidential editorial notes.

3.1.3.1 Editorial Notes and Submission Flags

Use the ‘Manuscript Notes’ text box (about halfway down the Details page of the manuscript) to insert important editorial notes about the manuscript (e.g., extensions granted to reviewers). Adding your initials and date at the end of your comment between brackets (e.g., ‘[MJ, 8 MAY 2013]’) will allow you to easily reconstruct afterwards who made the comment and when and determine whether it is still relevant. Before saving the changes, tick the ‘Display Manuscript Notes Flag’ check box directly above the text box. Click on ‘Save and Close’ at the bottom or top of the page to save your changes. There will be a red triangular symbol (‘flag’) next to the Details action link signifying that there are important editorial notes available. When the notes are no longer relevant, untick the ‘Display Manuscript Notes’ checkbox and save the changes. The red triangular flag will then disappear. Notes can be used for all kinds of purposes, e.g., suggesting referees to another editor, a note to yourself to ask the author to fix their references when you send it back for revision, a note that there may be ethical concerns, etc. These notes are only visible to editors.

When you are ready to accept a manuscript and have notes for the Production/Desk Editor at Brill, you can enter these into the ‘Production Notes’ text box. This text box is available on the Details page of the manuscript (below Manuscript Notes), on the page where you submit your decision (see section 3.3.3) and on the Transmittal Form (see section 3.3.3.3).
In addition to the default red triangular flag, there are a number of additional, special purpose ('custom') flags available that can be used to quickly flag a manuscript for a specific purpose (e.g. 'Copyediting in progress') without having to make detailed comments.

To display a custom flag, click on the empty flag symbol (.githubusercontent.com) next to Details, tick the box(es) in front of the flag(s) you wish to display and click on ‘Submit’. These flag(s) will then be displayed next to the Details link. Follow the same steps but instead untick the boxes to remove flags from the manuscript. If you hover over a custom flag with your mouse, a hover text will indicate what the flag stands for. If you want new (currently unavailable) flags activated for your journal, please contact the EM Support Department.

3.1.3.2 Co-Author Verification

As of June 2017, EM will automatically send a request to any co-authors listed as soon as a manuscript is submitted to the editor. Through a link in the email, the co-author(s) can then confirm or deny their contribution to the manuscript. This verification step does not interfere with the workflow in Editorial Manager, so should not cause any delays. You can always proceed with the manuscript without the co-authors having confirmed their co-authorship. Should you wish to view the confirmation status and/or resend the request to the co-authors, please open the Details page of the manuscript and click on the Author Status link in the ‘Other Authors’ section:

This opens up a new page where you can see whether the co-authors have responded and if so, what their response was (‘Yes’ means that they confirmed being a co-author; ‘No’ that they denied co-authorship). Resend Letter allows you to resend the email requesting their confirmation of authorship to an individual reviewer. Via the ‘Send Letters’ button you can resend the email to all co-authors who have not yet responded in one go.

Please note that if you see that the manuscript has more than one author in the manuscript file, but do not see any co-authors listed on the Details page, the request for confirmation of co-authorship will not have been sent. To be displayed on the Details page, you can either send the manuscript back to the corresponding author, asking them to edit the submission and add all co-authors at the ‘Add/Edit/Remove Authors’ step or you can click on Edit Submission yourself (choose the option to edit the submission data only), and add the co-authors on ‘Add/Edit/Remove Authors’ (click on ‘Submit’ and again on ‘Submit’ to confirm the changes; see also section 3.1.6.1 below). After that, you will see the co-authors listed on the Details page as well, and can choose to send them the request to confirm authorship.
3.1.4 Manuscript History: Status History and Correspondence Archive

Via History you can see what has happened with the manuscript so far and view all correspondence sent via EM. The actual letters can be viewed by clicking on the description in the ‘Letter’ column in the ‘Correspondence History’ section. Once you have opened a letter, you can choose to resend it (use ‘Resend’ to resend as is or ‘Edit and Resend’ if you wish to make changes first). Through ‘Add Editorial Correspondence’ in the ‘Correspondence History’ you can insert copies of relevant emails that were received or sent outside EM.

3.1.5 File Inventory: Access to Manuscript Source Files and Companion Files

File Inventory gives you access to the source files (e.g., Word files) uploaded by the author. The labels shown in the ‘Item’ column determine whether or not that particular file will be shared with the referees. Item Types ‘Biographical Note’, ‘Title Page’, ‘Cover Letter’ and ‘Supplemental’ are generally not included in the reviewer’s version of the PDF. All other item types are visible for the referees. The PDF generated and visible for the editors always contains all source files. The ‘Description’ column shows the labels as included in the PDF file for the related contents. If your journal uses double-blind peer review, please check this page carefully to ensure that the various files have been uploaded with the correct item type and that the contents of the files that will be shared with referees do not include any clues regarding the identity of the authors.

3.1.6 Edit Submission: Making Changes to the Manuscript PDF and/or Information

You can make changes to a submission whenever necessary via Edit Submission. When you click on this action link, you have two options, both of which are explained in more detail below: Edit the Submission Data Only and Edit the Submission (and Rebuild the PDF).
NOTES:

- **Edit Submission** is only available while the manuscript is in the hands of the editor, not when the manuscript is in the hands of the author for revision, or once a final decision (accept/reject) has been submitted.
- [For journals with double-blind review]: When you are at the end of the process and wish to upload a final edited version of the manuscript that should be used for typesetting, you are welcome upload a complete, non-anonymized version of the manuscript (referees no longer have access to the manuscript PDF after submission of their review). In such cases, use the ‘Manuscript (Anonymized)’ item label and retain the separate ‘Title Page’ document.
- When you make changes to the source files of the manuscript, it is advisable to remove the original versions of those files in order to avoid confusion. If you do leave the originals in, change the ‘Description’ of those files to ‘DO NOT USE’.
- Any Incomplete Submissions or Waiting for Approval links in your main menu are related to the Edit Submission process and contain manuscripts that require further action. If you do not know why the manuscript was edited in the first place, choose Revert Submission. This reinstates the PDF that was available in the system before you started the Edit Submission process. Edit Submission allows you to go back in and finish the changes. Approve Submission releases the updated PDF version and permanently overwrites the previous version.

3.1.6.1  Edit the Submission Data Only: Updating General Manuscript Information

This is the quickest option as you will not need to rebuild the PDF of the submission. Here you can make changes to the general manuscript information (metadata/submission data) as supplied by the author. This is the general information that is displayed directly on the website, for instance in the manuscript table or on Details (e.g., article title, authors’ names, keywords, abstract, etc.).

The buttons on the left hand side allow for quick navigation: Simply click on the button of the element you wish update and make the required changes. To save your changes, first click on ‘Attach Files’ on the left and then on ‘Submit’ at the bottom of the ‘Attach Files’ page.

NOTE:

- Changing the Article Type may affect the answers given by the author in the ‘Additional Information’ section. It is therefore advisable to make a copy of the original author’s answers before changing the article type.

3.1.6.2  Edit the Submission (and Rebuild the PDF)

This option allows you to update both the general manuscript information (metadata) *and* the manuscript PDF. The buttons on the left allow for quick navigation. Simply click on the element you wish to update and make the required changes. If you only want to change the source files of the submission, go straight to ‘Attach Files’.

Scroll down: Download those source files that need to be updated (note: if you do not want to make immediate changes to the submission in EM, it is better to download source files through the File Inventory action link; see section 3.1.5). Edit the file(s) where necessary and save them to your desktop.
Then first remove the original files from the submission: tick the ‘Select’ checkbox(es) for the corresponding files and click on ‘Remove’. You will then need to upload the edited versions: For each file, select the appropriate ‘item’ type (e.g., manuscript, title page, figure, etc.) from the drop down menu and change the description if necessary. Via ‘Choose Files’ you can select the appropriate file and attach it either by double clicking on the file name or dragging it to the ‘Drag and Drop Files Here’ area on the ‘Attach Files’ page. The file will then appear in the list with attached items at the bottom. When all replacement files have been uploaded, rebuild the PDF by clicking on ‘Next’, ‘Next’ and ‘Build PDF for my Approval’. The manuscript can now be found in the Submissions Needing Approval by Editor action folder in your main menu.

Once the updated PDF is available, the action links will appear and you can view the edited version via View Submission. Please check the PDF carefully to ensure that all is the way it should be. If necessary, you can edit the submission again until the PDF is satisfactory. To undo the changes you have made and restore the version as originally available, click on Revert Submission. If the PDF is okay, click on Approve Submission and ‘OK’. This will release the edited version into the system (the updated PDF will be used instead of the original from that point on).

3.1.7   Send Back to Author: Asking the Author for Technical/Stylistic Edits
If you want the author to make changes (in case of missing items or other technical problems with the submission), you can return the submission to the author for further editing via Send Back to Author. This link will lead you to the ‘Send Back to Author – Select Letter’ page. Here the ‘AUTHOR: Please Edit Submission’ letter should be selected in the drop down menu. Click on Customize at the right hand side of the page so that you can edit the letter to the author before sending.
The letter to the author is fully editable; at the very least you will need to let the author know exactly what changes need to be made (the form letter includes a section where you can simply insert your comments). If helpful, feel free to attach files to this email using the ‘Add/Change Attachments button’: on the ‘Select Files’ page use the ‘Choose files’ button to select the relevant file(s) from your computer. Press ‘Proceed’ to return to the letter page. Click on ‘Send Now’ to actually send the letter and return the manuscript to the Author’s Menu.

Once the author has edited the submission and returned it to you, it will reappear in your (Direct-to-Editor) New /Revised Submissions Requiring Assignment folder.

NOTES:

- **Send Back to Author** is only available while the submission is in (Direct-to-Editor) New /Revised Submissions Requiring Assignment.
- If you want the author to revise the content of the manuscript and you want to be able to compare the revised version with the previous version, you will need to submit a formal decision (Assign to yourself and Submit Editor's Decision and Comments (see sections 3.1.9 and 3.3.3) instead of using Send Back to Author.
3.1.8 Remove Submission
As long as a manuscript is in (Direct-to-Editor) New Submissions Requiring Assignment you can remove the submission from the system. This option need only be used in rare cases (e.g., the same paper submitted multiple times). Once a manuscript has been assigned to an editor, removal is no longer possible. When you need to deactivate a manuscript at a later stage, set the final disposition to ‘withdrawn’ instead (see section 3.3.3.3).

NOTE:
➢ If you want to formally reject a manuscript, do not remove the submission but instead first assign the paper to yourself (see section 3.1.8) and then submit an official decision (see section 3.3.3).

3.1.9 Assign Editor/Assign to Myself
As explained above, incoming new and revised manuscripts are generally checked first for a number of technical points. After this initial check, you will always need to formally assign the manuscript to an editor before you can proceed with sending it out for review or taking a decision. The editor that you assign here can be yourself (for instance if you are the only editor for the journal) or another editor whom you want to handle the paper. Manuscripts that are assigned to you will appear in New Assignments and will remain there until you have either invited reviewers or submitted a decision (see below).

NOTES:
➢ For workflows with multiple editors where new submissions are divided automatically between the various editors, you will always need to assign the manuscript to yourself first (Assign to Myself). After that you can send the paper on to another editor for further processing via the Assign Editor link. See also section 3.1.10 on redirecting a paper to another editor.
➢ For workflows with multiple editors: If some or all decisions of subordinate editors (e.g., Associate Editors) need to be formally approved by an overseeing editor (e.g., Editor-in-Chief) and the overseeing editor needs to submit a formal decision him-/herself at the end of the process, all new papers should first be assigned to the overseeing editor. After that the overseeing editor can assign the paper on to another editor if desired. The last assigned editor will be the Handling Editor who will send the paper for review. When ready, the Handling Editor submits a decision. Depending on whether that type of decision needs to be ‘approved’, the Handling Editor should notify the author himself OR the manuscript will be returned to the overseeing editor, who should then submit his/her own decision and notify the author (see section 3.3.3 on submitting decisions).

3.1.9.1 Unassign Editor: Cancelling Editorial Assignments and/or Replacing Handling Editor
Use Unassign Editor to cancel an editorial assignment, change the handling editor of a manuscript or make changes to the editors involved in the ‘Editor Chain’ of the manuscript. Click on the rubbish bin (Trash symbol) to delete an editor from the list of assigned editors (the one listed at the bottom is the handling editor). To replace an editor with another, use the ‘role’ and ‘new editor’ drop down menus. The ‘New Editor’ menu shows the available editors that have the editorial role shown under the ‘Role’ drop down menu.

To execute the changes either click on ‘Confirm Selections and Send Default Letters’ or ‘Confirm Selections and Send Custom Letters’. These buttons are greyed out until you have made actual changes to the editor’s list. The first option sends standard letters to editors that have been removed and added to the ‘Editor Chain’. Use the other (‘custom’) option if you want to edit the associated letters (or want to avoid sending any of the letters altogether).
NOTE:
- If you see no rubbish bin, the manuscript is likely under review, in which case you cannot delete the editor assignment and need to replace the editor with another editor instead.

3.1.10 Redirect to Other Editor
If incoming manuscripts are automatically divided between you and (an)other editor(s), you can reroute the paper to one of the other receiving editors via the Redirect to Other Editor action link. You will then no longer be involved in the online editorial process for that paper.

NOTE:
- This option is not available after a paper has been assigned to an editor.

3.1.11 Sending Ad Hoc Emails
Send Email allows you to send ad hoc emails that are not connected to any specific action in EM, for instance a query to an author. You can attach files to these ad hoc emails, which will then be sent as regular email attachments. These can be files already stored in EM (e.g., manuscript source file), or files from your PC. Click on Send Email, select the appropriate letter from the drop down menu, fill in an email address (if necessary) and make changes to the letter where appropriate.

To attach files, click on ‘Add/Change Attachments’ and on the next page select the files that you wish to attach:
Via ‘Choose Files’ you can select files from your computer (double-click on the file or click ‘Open’ to confirm file attachment). In the ‘Add Files from Submission Inventory’ Section you can select a ‘System PDF’ (= the file that is available under View Submission; editor's or reviewer's version) and/or one or more ‘Submission Files’ (= manuscript source files). When ready click on ‘Proceed’. This will return you to the letter. Click ‘Preview and Send’ and then ‘Send Email’ and ‘Close’ to send the letter.

NOTES:

- If no files are visible below ‘Add Files from Submission Inventory’, click on the ‘+’ symbol in front of the section header. This will then change to a ‘-’ symbol and you can then see and select the various files available in EM.
- Make sure when you select files for attachment that the total file size of the attachments is no larger than 4-5 MBs. Otherwise, you run the risk of the email not being delivered to the recipient.
- Should the file attachment option be missing, please contact EM Support.

3.1.12 Linked Submissions: Creating Groups of Manuscripts

In EM you can make groups of papers, e.g., a separate group for each journal issue, for a Special Issue, or you may have a number of papers that you want to publish together (or keep track of together), but may not yet have decided in which issue they should be published. You can make as many groups as you want, and can add and remove manuscripts from a group at any time. Creating groups of manuscripts (and editing their contents) can be done via Linked Submissions. For each submission, you will find Linked Submissions at the bottom of the Action links. Click on the link to add the manuscript to an existing group, or to create a new group and add the paper to this new group.

Clicking on Linked Submissions will lead you to the following page as shown in the screenshot below. To add the paper to an existing group, select the appropriate group from the drop down menu, click on ‘Add to Group’ and then on ‘OK’. To create a new group, first click on ‘Create a New Group’, fill in a name and click on ‘Submit’. This will take you back to the ‘Add to/Create Linked Submissions Group’ page: Here, the newly created group will automatically be selected in the drop down menu and all you need to do then is click on ‘Add to Group’. The page will then refresh and show you to which group you have added the paper as well as all papers currently associated with that group (including a.o. their current status).
When you return to the submission, there will be a little green icon next to the Linked Submissions action link. This symbol indicates that the paper is part of a group. When the symbol is shown, simply click on the link to see the group overview page. You can also access the Linked Submission Groups via your main menu (see section 3.15; that section also includes more information on adding and removing papers).

3.2 Revised Submissions Requiring Assignments / Direct-to-Editor Revised Submissions

This action folder contains all manuscripts for which the author has just submitted a revised version. Same as with new submissions, you would start with a quick technical check to ensure that the revised versions are in order before assigning them to an editor for further handling (see section 3.1.9). For more information on processing newly received submissions, see section 3.1. Processing revisions works basically the same as processing new manuscripts: you have the same options throughout the process. The only difference is that via View Submissions you get to choose which version of the manuscript you wish to view (the latest revision or a previous version); the PDF of the revision should include a 'Response to Reviews' wherein the author explains which changes have been made compared to the previous version (for double-blinded journals this document should be anonymized!); and you can access reviews and decisions made on previous versions (View Reviews and Comments).

NOTE:

- If you need to approve of some or all decisions of other editors, you always need to assign the manuscript to yourself first. Then, if need be, you can assign it on to another editor for further handling. If you forget to assign the manuscript to yourself first, the papers will still be returned to you for approval (and author notification), but you will then find them in another folder in your main menu (All Submissions with Editor’s Decision instead of All Submissions with Required Reviews Complete) and you will not need to take a separate decision yourself. You still have full control over what goes to the author as you will be the one to send the decision letter and can make changes to its contents where required.
3.2.1 Authorship Changes Alert

While the manuscript is still located in a Revised Submissions folder, the system shows an alert symbol (▲) next to the Details action link of the manuscript if there have been any changes in authorship compared to the previous version of the manuscript.

To see more details about exactly how authorship has changed, click on Details, and in the ‘Other Authors’ section on Author Status. The Author Status shows you whether authors were added, removed, now appear in a different sequence, etc.

3.3 New Assignments

Papers assigned to you for handling will appear in your New Assignments action folder. Should you wish any of these to be handled by another editor, you can assign it to that editor (see section 3.1.9). You can also choose to Invite Reviewers (see section 3.3.1), or submit a decision (see section 3.3.3) instead. Once you have taken an official action
on the manuscript (invite reviewers, submit decision or assign editor), the manuscript will disappear from New Assignments and move to the appropriate link in your Editorial Menu.

NOTES:

- Access to the Assign Editor option depends on your journal's workflow and your editorial role.
- Once you have assigned a paper to another editor it disappears from your ‘Editor To-Do’ List. Should you need to ‘approve’ the other editors decision (i.e. submit your own decision and/or notify the author), the manuscript will appear in either Submissions with Required Reviews Complete (see section 3.4) or All Submissions with Editor’s Decision (see section 3.12) as soon as the other editor has submitted a decision.

3.3.1 Inviting Reviewers
Editorial Manager allows you to connect 2 types of reviewers to a submission:

- Invited Reviewers: These reviewers are invited immediately.
- Alternate Reviewers: These are queued for invitation, meaning that as soon as one of the invited reviewers declines to review or is taken off the manuscript by an editor ('un-invited'/'un-assigned'), one of the alternate reviewers will be invited automatically; this way, the process can continue without your having to invite a new referee every time someone declines to review.

Click on the Invite Reviewers action link of a manuscript to go to the ‘Reviewer Selection Summary’ page. Any reviewers already associated with the manuscript are shown on this page in the ‘Selected Reviewers’ section. A current status is displayed next to each reviewer (e.g., ‘invited’, ‘agreed’, etc.). For reviewers with an invited/agreed status you will also have an Un-invite or Un-assign option that allows you to cancel the assignment (see also section 3.3.1.2).

If no reviewers have been invited to date, the ‘Selected Reviewers’ section will not show any reviewer names.

The ‘Review Settings’ section shows how many reviews are required for this particular article. You can change the number of required reviews at any time by clicking on Change; simply change the number and click on ‘Save and Close’. This number determines when the manuscript pops up in your main menu as requiring action: Submissions with Required Reviews Complete (= take decision or invite more reviewers if necessary); Submissions Requiring Additional Reviewers (= invite more reviewers or change the number in the Review Settings to reflect the correct number of required reviews).

To invite reviewers, click on ‘Go’ in the ‘Reviewer Search’ section. If necessary, change the search criteria in the drop down menus before clicking on ‘Go’. You can for instance search for classification matches, for reviewers suggested by the author, or search the entire people database, rather than only the reviewer database.

On the next page, enter the last name of the person you wish to invite into the ‘Value’ field. Searching by last name is the default option, but you can also search for a reviewer using a different search criterion (e.g., first name, email address, personal keywords, etc.) in which case you simply change the search criterion in the drop down menu on the left. You can look up more than 1 person at a time by filling in more value fields. Execute the search by clicking on ‘Search’ (or the Enter key on your keyboard). Any search results will be displayed underneath the search
grid. These include an overview of journal specific statistics that may be relevant for an editor when deciding whether or not to invite someone, a.o. how many times that person has reviewed before, whether (s)he has any other reviews pending for the journal, how long (s)he generally takes to review, whether (s)he is a board member, etc. If the person you searched for does not show up in the search results, you can register and invite them via Register and Select New Reviewer (available both at the top and the bottom of the page).

If the person(s) you want to contact does appear in the search results, tick the ‘Inv’ box in front of that person to invite them immediately and the ‘Alt’ box in front of those people you want to use as alternate reviewers. Scroll down and click on ‘Proceed’.

On the next page if you want, you can select another invitation letter from the drop down menu, customize (i.e. view and/or edit) the individual letters and/or amend the number of days the reviewer gets to review the paper. Click on ‘Confirm Selections and Proceed’ to send out the invitation letters and add those reviewers selected as ‘Alternate Reviewers’ to the ‘Alternate Reviewers’ section. The default invitation letter is ‘REVIEWER: Invitation to Review’, but you have two other letters available as well, both intended for revised manuscripts: In case of a revised manuscript, it usually avoids confusion if you alert the reviewer that this is a revised version of which he has or has not reviewed the previous version.

NOTES:
➢ Depending on your workflow you may or may not be able to invite reviewers.
➢ You cannot invite reviewers if the manuscript has not yet been assigned to an editor.
All reviews and editorial decisions (if any) can be accessed via the View Reviews and Comments action link.

Book Reviewers are considered authors in EM because they submit a book review, which is intended for publication in the journal. EM sees reviewers (or referees) as people who are asked to advise the editor as to whether or not a paper submitted to the journal is suitable for final publication. Their review (= advice) is not published in the journal. For more information on how to solicit book reviews, see section 4.

Do not use the Solicit Commentary action link for soliciting reviews; this link is intended to obtain a commentary (from an expert in the field) on a manuscript. This commentary is then intended to be published together with the manuscript.

3.3.1 Inviting Reviewers for Revised Manuscript

Inviting reviewers for a revised manuscript works basically the same as inviting reviewers for a new submission (see above). Please note that on the ‘Reviewer Selection Summary’ page for revised manuscripts (if previously reviewed), the ‘Reviewer Search’ section looks slightly different as it will then by default search for the previous reviewers of the manuscript.

If you click on ‘Go’ without changing the drop down selection, the next page will automatically show you the previous reviewers in the Search Results and you can simply select those reviewers that you want to check the revised version. If the revision is to be sent to a completely new reviewer (for a ‘fresh set of eyes’), please change the drop down selection from ‘Select from Previous Reviewers’ to ‘Search for Reviewers’ before clicking on ‘Go’. This will lead you to the search page where you can do a free text search (same as for new submissions).

The invitation letters that are selected by default for revisions are slightly different as these include a reference that the manuscript is actually a revised version that (s)he has reviewed before or that has been previously reviewed by other referees. For new reviewers, you will see the letter ‘REVIEWER: Invitation to Review Revision (new ref)’ selected; for the original reviewers, the system will automatically select the letter ‘REVIEWER: Invitation to Review Revision (orig. ref)’. You can view and edit the contents of a letter via the Customize link. If you wish to select a different invitation letter, please feel free to change the invitation letter selection on the ‘Confirm Selection and Customize Letters’ page.

3.3.2 Un-invite/Un-assign Reviewers: Cancelling Review Invitations and Assignments

To cancel a review or review invitation, look up the manuscript, click on Invite Reviewers and then on Un-assign/Un-invite next to the name of the reviewer that you wish to take off the manuscript. You will then need to send out the accompanying letter to the reviewer – as usual, you can view and edit the letter by clicking on ‘Send Custom Letter’; otherwise you use ‘Send Default Letter’.

3.3.2 Attaching Additional Files to the Submission (e.g., Marked Manuscript for Author)

Via Attachments you can upload extra files for a paper, for your own or other editor's reference, or to share with the author. This link can be accessed in various locations:
- Via the Details action link (top half of the page):

<table>
<thead>
<tr>
<th>Editorial Status Date:</th>
<th>Oct 27, 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Editorial Status:</td>
<td>Under Review</td>
</tr>
<tr>
<td>Attachments:</td>
<td>[ ]</td>
</tr>
<tr>
<td>Transmittal Form:</td>
<td>Letter of Transmittal Form</td>
</tr>
<tr>
<td>Discussion Forum:</td>
<td>Initiate Discussion</td>
</tr>
<tr>
<td>Author Days To Review:</td>
<td>20</td>
</tr>
<tr>
<td>Final Disposition Term:</td>
<td></td>
</tr>
<tr>
<td>Corresponding Editor:</td>
<td>Brian Fisher, Editor-in-Chief</td>
</tr>
<tr>
<td>Abstract:</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

- Via the View Reviews and Comments action link:

- On the Submit Editor's Decision and Comments page:

  All of these links lead to the ‘Attachments’ page. Here you can upload your own file(s), make changes to any review attachments and indicate which attachments should be shared with the author. Attachments will NOT be shared with authors unless you actively grant them access (tick the ‘Allow Author Access’ checkbox to the right of an attachment to grant the author access).

  ![Attachments](image)

  Click on ‘Upload Attachments’ to add new files. This will open a new window. Here you enter a description for the file you want to upload. Select the relevant file from your desktop via ‘Browse’; click on ‘Open’ to confirm your selection. Then (if you wish to share the file with the author) tick the ‘Allow Author Access’ checkbox and click on ‘Attach This File’.
A new section will appear at the bottom of the page, entitled ‘Attachments’. To upload multiple files, repeat the steps above until all relevant files have been uploaded. When ready, click on ‘Proceed’ at the bottom of the page. This leads you back to the main ‘Attachments’ page. This should now contain an overview of all attachments uploaded for the manuscript. Click on ‘Save and Close’ to close the page.

NOTE:
- If the file attachment you want to share with authors and/or reviewers should be anonymous (e.g., files supplied by referees), please make sure that the document properties of the file do not contain any clues as to the document author's identity and that the name is not included in the text of the document nor in the file name. EM automatically anonymizes the document properties of PDF and MS Office files, but not for other file types. This cleansed version is available as ‘Sanitized Copy’ and is the version that (if shared) will be accessible to the author. Note that the ‘Description’ and ‘File Name’ are also visible to authors and reviewers (if granted access to the attachment). If an attachment was uploaded by a reviewer, authors and reviewers will only be able to see ‘Reviewer 1’, etc. in the ‘Uploaded by’ column.

3.3.3 Submitting Your Decision
When you are ready to take a decision, click on the Submit Editor’s Decision and Comments action link of the manuscript. Select a decision type from the drop down menu at the top of the page (e.g., ‘Minor Revision’, ‘Reject’, etc.). If the manuscript has been reviewed, the ‘Confidential Comments to Editor’ and ‘Comments to Author’ text boxes will be prepopulated with the review comments, otherwise these fields will be blank. You can simply insert your own comments above the reviewer comments, into the same text boxes and edit the review comments where necessary. All comments inserted into the ‘Comments to Author’ box are automatically pasted into the decision letter that will be sent to the author (letter can be edited before sending). This means that you will need to ensure that any comments that are relevant for the author are included in the ‘Comments to Author’ text box and that any reviewer names are deleted from this field to ensure that the reviewers’ identities remain confidential.
Any attachments uploaded by editors and/or reviewers can be accessed via the Attachments link (see also section 3.3.2). On the ‘Attachments’ page, you can indicate which attachments (if any) should be made accessible to the author and/or reviewers and you can also upload attachments of your own.

When all is in order and you are ready to submit your final decision, click on ‘Proceed’ and then again on ‘Proceed’. If another Editor needs to formally approve your decision, the second button will be called ‘Submit’ instead of ‘Proceed’ and by clicking on ‘Submit’, you send the paper to the overseeing editor for further handling. Otherwise, the second ‘Proceed’ button will automatically lead you into the decision letter in which case you will also need to notify the author of your decision (see section 3.3.3.1 for more information).

NOTES:

- Should you have made a decision in error, the decision can be undone through the Rescind Decision action link (see section 3.3.3.2).
- For any reject and accept decisions you also need to Set the Final Disposition to finalize the process (see section 3.3.3.3). Setting it to ‘Accept’ notifies the production editor. You can only do this after having sent the decision letter to the author.

3.3.3.1 Notify Author: Sending the Decision Letter to the Author

Once you have submitted a decision, someone (either you, an overseeing editor or editorial office) will need to notify the author of this decision. If you have permission to send the decision letter, you will be led into the decision letter immediately after having submitted your decision.

Before sending the letter, you can still make the following changes:

- Rewrite the letter and make changes to the editorial and review comments (shown at the very bottom of the letter). The contents of the letter text box are fully editable. Any data shown in between percentage (%) signs (e.g., %LAST_NAME%) will automatically be inserted by the database before the letter is sent. Click on ‘Preview Letter’ to see the final letter.
- Change the revision deadline at the top of the page (except when you accept or reject a ms).
- Change the subject line of the email.
- Copy someone in on the decision letter by using the bcc and/or cc checkboxes and email fields.
- Modify the decision type (e.g., change from ‘Accept’ to ‘Minor Revision’).
- Grant the author access to any of the attachments and/or upload a new attachment and make this available to the author.
- Insert comments for the Production Editor into the Production Notes field (when accepting the manuscript).

When ready, click on ‘Send Now’ – the letter will be sent immediately.
NOTES:

- If the formal decision letter has not been sent, you will find the paper in All Submissions with Decisions (bottom half of main menu). The submission will have a new action link: Notify Author. This will lead you to the ‘Notify Author’ page (see above).

- The decision letter must be sent as otherwise, the next step cannot be taken: The author will not be able to upload a revised version; or, if accepted/rejected, you cannot set the final disposition (see also section 3.3.3.3). The latter is crucial as this is when you send the accepted paper to the Production Editor.

- If desired, we can also activate the option to notify reviewers about one or more decision types. When activated, this involves an extra step that is automatically triggered as soon as you have sent the decision letter to the author. At that point, you can still edit the notification to the reviewer and even decide not to send it at all. For more information and implementation, please contact EM Support.
3.3.3.2 Rescinding a Decision
As soon as a decision has been taken, a new action link will become available: Rescind Decision. This link allows you to undo your decision if it was taken in error.

If you rescind a decision before having notified the authors, choose 'Rescind without Sending Letter'. If you have already notified the author about your decision, however, please rescind your decision using 'Send Custom Letter' (to view/edit the letter) or 'Send Default Letter' instead: this informs the author that the decision they received was taken in error and should be disregarded.

NOTES:
- Not all editors have permission to rescind their decision. In such cases, please contact your overseeing editor or contact EM Support to have your decision rescinded.
- If you had already set the final disposition to 'Accept', please also ask your Desk Editor at Brill to put the manuscript on hold.

3.3.3.3 Set Final Disposition: Send Accepted Mss to Production Editor and Withdrawing Mss
For all accepted papers, you must set the final disposition in order to send these manuscripts to the Production Editor at BRILL. Set Final Disposition is one of the default action links displayed for a manuscript and opens a new window. Select the 'Accept' final disposition from the drop down menu and click on 'Proceed':

This leads you into the Transmittal Form. This Transmittal Form contains manuscript information that will be emailed to the Production Editor at BRILL, so please check whether the information is correct and make changes where necessary. Comments for the Production Editor should be inserted into the 'Production Notes' field. When ready, click on 'Proceed' at the bottom of the page.
You will then see an overview of the letters to be sent, usually this will be at the very least the notification letter for the production editor, but there may well be one or more additional letters listed here. You can edit these letters by clicking on the letter's name (then view/edit and save your changes). When ready, complete the final disposition by clicking on 'Send' and then on 'OK'.

The 'Withdrawn' final disposition option is available throughout the editorial process and can be used to deactivate a manuscript, for instance because the author has withdrawn the article. Setting the final disposition to 'Withdrawn' is a lot quicker than setting it to 'Accept': Click on Set Final Disposition, select 'Withdrawn' from the drop down menu, click on 'Proceed' and then on 'Close'.

NOTES:
- The system requires a formal accept/reject decision to be taken and the accompanying decision letter sent (see sections 3.3.3 and 3.3.3.1) before you can set a final disposition other than withdrawn.
- It is crucial that you set the final disposition to 'accept' after communicating acceptance to the author as otherwise, the production editor will not receive notification that a paper has been accepted for publication and hence the paper will not be typeset.
- For rejected manuscripts for which you have sent the decision letter after 24 February 2016, the final disposition will automatically be set to 'Reject'. For accepted manuscripts you will still need to set the final disposition manually.

3.3.3.4 Initiate Rebuttal: Allowing Revision for a Rejected or Withdrawn Manuscript

Sometimes when you have rejected a paper or set its status to 'withdrawn' in Editorial Manager, the author may ask you to reconsider your decision. In many cases, you may not be persuaded to do this, but in some, you may find that the author has valid arguments and decide to give him another chance. In such cases, you can look up the manuscript and reopen the revision option by clicking on Initiate Rebuttal. This will reactivate the manuscript and will allow the author to submit a revised version of his manuscript. This way, all relevant manuscript versions, reviews and decisions will be kept under the same manuscript number. If you rather prefer to process the revised version as a wholly new paper, you can ask the author to upload the revision as a new manuscript instead, with a reference to the old manuscript number (in that case, do not initiate rebuttal for the original manuscript).

3.4 Submissions with Required Reviews Complete

This folder contains submissions for which the required number of reviews as indicated in the 'Review Settings' on the Invite Reviewers page (see section 3.3.4) have been submitted, theoretically making the paper ready for an editorial decision. Depending on whether you find these reviews sufficient, you can either submit a decision (see section 3.3.3) or invite more referees. If you invite an additional referee and do not wish to keep the paper in Submissions with Required Reviews Complete, simply increase the number of required reviews in the 'Review Settings' to account for the additional referee. If the number of required reviews for the submission remains unaltered, the manuscript will remain in Submissions with Required Reviews Complete and may serve as an extra reminder for you to keep an eye on the manuscript. All reviews and editorial decisions (if any) can be viewed via the
View Reviews and Comments action link of the manuscript: click on the recommendation (e.g., ‘Major Revision’) to view the contents of the review/decision.

NOTE:

- Papers for which you need to formally approve other editors’ decisions are shown in this folder as well (status: ‘Decision in Process’). For these, submit your own decision via Submit Editor’s Decision and Comments, edit the comments where necessary and send the decision letter to the authors. Your decision is the one that is final. Note that papers for which you need to approve decisions and for which you have not assigned yourself previously will end up in All Submissions with Editor’s Decision for approval instead. In that case, you will not need to submit a formal decision of your own, but instead have to notify the author. You can still edit the decision letter where necessary (decision type, letter contents) and in that way have full control as to what is communicated to the author.

3.5 Submissions Requiring Additional Reviewers

This folder contains papers for which the number of active reviewers (invited/agreed/review completed) is less than the required number of reviews as entered in the ‘Review Settings’ on the Invite Reviewers page (see section 3.3.1). If the number of referees currently associated with the manuscript is sufficient, update the number of required reviews in the system so that the submission will disappear from Submissions Requiring Additional Reviewers.

3.6 Submissions with One or More Late Reviews

These are papers for which one or more reviewers have agreed to review, but have not submitted a review within the deadline. To get a good overview of which reviews are overdue, send reminders and check whether other action may be necessary, please check the reminder reports regularly (see section 3.16 on reminding reviewers and authors).

3.7 Submissions with Active Discussions

This folder contains all papers with current forum discussions and is only visible in case of pending discussions. A forum discussion can be used to discuss a manuscript amongst two or more editors. For some journals (advisory) board members can also be contacted through the discussion forum for quick advice on for instance suitable reviewers for a manuscript.

3.7.1 Initiate Discussion: Starting Up a Forum Discussion

Any editor can start a forum discussion (if they have permission to do so) at any point in the editorial process by clicking on Initiate Discussion (available as action link and as a separate link on the manuscript Details page):
Here you should:

- Insert a short description as 'Topic' at the top of the page;
- Insert a more detailed question into the 'Initial Comments' text box at the top of the page;
- Tick the 'select' checkboxes on the left for those editor(s) and/or board member(s) that you want to contact;
- Indicate for each participant whether the discussion forum should grant him/her access to the reviews and any previous editorial decisions submitted for the paper ('View Reviews and Comments' check box) and/or to the submission source files ('Download Files' check box).

Please do not use the 'Start Discussion without Sending Letters' option: the people you want to ask for advice will not receive any notification about this and hence are unlikely to respond! When ready, instead click on 'Proceed to Customize Letters'. Select the appropriate letter from the 'Letter' drop down menu. To view and/or edit the letter's contents use Customize. Click on 'Confirm Selections and Send Letters' to actually send the letter(s).

Then click on 'Set Flag', tick the checkbox in front of 'Discussion initiated' (☑), click on 'Submit' and then on 'Close'. When the page refreshes, you will see the ‘Discussion initiated’ flag (☑) displayed next to the Details link of the manuscript, which serves as a visual reminder of a pending discussion. You have now successfully initiated a forum discussion and you as well as the other participants will be notified via email as soon as any new comments are posted.
The forum can be accessed via: Submissions with Active Discussions in your main menu; Discussions action link; or via the Discussions link on the Details page. See section 3.7.2 below on how to post comments on the forum. You can start up multiple discussion threads for a manuscript if need be. Click on Discussions and then on ‘Start New Topic’ to create a new thread (steps are the same as when initiating a new discussion, see above).

NOTES:
➢ If desired, we can add more letters to the letter drop down menu or edit the contents of the current letters so that you can use your own version by default. Please contact EM Support if you wish to make changes.
➢ When the discussion is finished, you need to formally close it in EM in order to remove it from Submissions with Active Discussions (see section 3.7.3).

3.7.2 Participating in a Forum Discussion
If an editor needs your advice on a manuscript, you will receive an email with a direct link to the discussion forum (where you can then post your comments). Alternatively, you can access the forum via Submissions with Active Discussions in your main menu: click on the Discussion action link and then on the View link of the discussion thread you wish to open. View Submission at the top of the next page (see screenshot below) gives you access to the pdf of the submission. If granted access, you will also find links there to the File Inventory (access to source files) and View Reviews and Comments (access to reviews and editorial decisions). Enter your comments into the text box on the left and click on ‘Post’. This will add them to the comments list on the right hand side, which is visible to all editors participating in the discussion. Click on ‘Save and Close’ to save your changes. All participants are automatically notified via email whenever new comments are posted. If you are the discussion initiator, posting comments works the same way.

3.7.3 Concluding a Forum Discussion
When the discussion is finished, you need to formally close it in EM in order to remove it from Submissions with Active Discussions. You can do this by first accessing the discussion (see section 3.7.2 above) and then clicking on ‘Conclude Discussion’ at the bottom of the discussion forum page. Then click on ‘Set Flag’, tick the box for ‘Discussion closed’ (☒), untick the box for ‘Discussion initiated’, click on ‘Submit’ and then ‘Close’. 
3.7.4 Accessing Comments on a Closed Forum and Reopening a Discussion

You can still view the comments of closed discussions via the Discussions action link. To reopen a closed discussion thread, click on ‘Re-open Discussion’. You can then initiate a discussion in exactly the same way as you would initiate a wholly new discussion (see section 3.7.1). Once re-opened, the comments of the original discussion remain visible.

3.8 Reviewers Invited – No Response

These are papers for which one or more reviewers have not yet responded to the invitation to review. These papers need not be problematic: As soon as you invite a referee, the associated paper will be transferred to Reviewers Invited - No Response and will remain there until all reviewers have either agreed or declined (or have been un-invited by the editor). To get a good overview of which reviewers are actually slow in responding, send reminders and check whether other action may be necessary, please check the reminder reports regularly (see section 3.16 on reminding reviewers and authors).

3.9 View All Assigned Submissions

View All Assigned Submissions is a tracking folder: it shows you all papers currently being processed by the various editors of the journal. It does not include manuscripts out for revision (see section 3.11), submissions for which a decision has been taken but the author still needs to be notified, accepted and rejected submissions (for both see section 3.12), nor any new and revised submissions that have just come in (see sections 3.1 and 3.2).

NOTES:
- This folder is for information purposes only; it does not include all possible action links. To take action on a manuscript (e.g., submit a decision), it is better to either look it up through Search Submissions or approach it through one of the action folders in the Editor ‘To-Do’ List section in your main menu.
- This option is only available for editors with permission to view ALL manuscripts in the system.

3.10 View All Assigned Submissions Being Edited

This is an overview of all submissions for which the Edit Submission process was started but never finished (see section 3.1.6). Please contact the editor listed as ‘Person Editing the Submission’ and ask him to finish the process.

NOTES:
- This option is only available for editors with permission to view ALL manuscripts in the system.
It is important to resolve ‘Waiting for Approval’ or ‘Incomplete’ statuses (both connected to unfinished ‘Edit Submission’ processes) as quickly as possible: if left as is, these can cause technical problems when you try to submit a decision or invite reviewers.

### 3.11 Submissions out for Revision

Submissions out for Revision shows all papers returned to the author for revision for which you have not yet received the revised manuscript. If the ‘Current Status’ is ‘Author Declines to Revise’, the author has indicated online that (s)he does not intend to submit a revision. ‘Incomplete’ or ‘Waiting for Approval’ statuses indicate that the author started to upload a revised version, but has yet to finish the process (and hence you have not yet received the revision). To clean up the folder, you can set the final disposition to ‘Withdrawn’ for revisions that you no longer expect to come in for instance because the author has declined to revise (see section 3.3.3.3).

By running the reminder reports regularly, you can easily check which authors are late in submitting a revised version and send reminders where necessary (see section 3.16 on sending reminders).

**NOTE:**

- This option is only available for editors with permission to view ALL manuscripts in the system.
- For manuscripts for which the author has declined to revise in EM after 12 May 2016, the final disposition will automatically be set to ‘withdrawn’ 30 days later.

### 3.12 All Submissions with Editor’s Decision

These are either submissions with a final decision (‘accept’/’reject’) for which the final disposition still needs to be set (status: ‘accept’/’reject’; see section 3.3.3.3) OR papers for which a decision has been taken, but the decision letter still has to be sent to the author (status: ‘decision in process’). To send the decision letter, click on Notify Author, edit the letter where necessary and click on ‘Send Now’ (see section 3.3.3.1).

**NOTES:**

- This option is only available for editors with permission to view ALL manuscripts in the system.
- If you do not send the official decision letter, the author will not be notified about the decision and will be unable to submit a revised version online: as far as the system is concerned, the paper is still in the hands of the editor and thus the author cannot make any changes to the submission. For accepted and rejected papers, you will also be unable to set the final disposition.
- For rejected manuscripts for which you have sent the decision letter before 24 February 2016, you will still need to set the final disposition. For rejections after that date the system will automatically set the final disposition to ‘Reject’.
- By Setting the Final Disposition to ‘Accept’ you send the accepted manuscripts to the production editor, so if this step is skipped, BRILL does not receive the manuscript for final publication. The Accept Final Disposition cannot be set automatically.

### 3.13 All Submissions with Final Disposition

This folder is for information purposes only: it shows all papers for which the editorial process is finished in Editorial Manager (papers have been accepted, rejected or withdrawn). The subfolders show these manuscripts per category (Accepted, Rejected, Withdrawn). Anything in Accepted has been sent to BRILL for typesetting.

### 3.14 My Assignments with Decision

My Assignments with Decision contains submissions for which you have taken a decision and for which either the revision has not yet been submitted, the final disposition still needs to be set or the decision letter has yet to be sent to the author. If the official decision letter is not sent, the author will not be notified about the decision and will be unable to submit a revised version online. To send the letter, click on Notify Author, edit the letter where necessary
and click on ‘Send Now’ (see section 3.3.3.1). Depending on the workflow, you may not have permission to send the decision letter yourself. If your decisions still need to be confirmed by an overseeing editor, that editor is the one who should send the letter. As soon as the ‘Decision Term’ at the far right becomes a hyperlink, the letter has been sent and can be viewed via the link.

3.15 Linked Submission Groups

As indicated in section 3.1.12, you can make groups of papers (‘Linked Submission Groups’). Available Linked Submission Groups can also be accessed via Active Linked Submission Groups near the bottom of your main menu. Via Edit and View Linked Group you can view all submissions connected to that group, edit the group name, remove and add papers. The group overview also contains current status and access to general manuscript information.

3.15.1 Removing Papers from a Linked Submission Group
To remove papers from a Linked Submission Group click on the Remove from Group link(s) for the paper(s) concerned and then on ‘Submit’.

3.15.2 Adding Papers to a Linked Submission Group
Add papers to a group by clicking on ‘Add Submissions’ at the top of the page. This will lead you to the search submissions page. Make sure to change the search criterion so that it will search for manuscript number, author, or article title and look up the paper(s) you want to add: Enter your search term into the ‘Value’ field and execute the search. All papers in the search results will have a checkbox in front of them. Tick the boxes for the papers you want to add to the group and click on ‘Add to Group’ at the bottom of the page. This will return you to the ‘Edit Linked Submission Group’ page; the papers selected have been added to the group. Click on ‘Submit’ to save your changes.

NOTE:
➢ Adding multiple papers to a Linked Submission Group as described in this section can only be done via Active Linked Submission Groups. You can of course add an individual paper to a group via the Linked Submissions action link for that specific manuscript (see section 3.1.12).

3.15.3 Deactivating a Linked Submission Group
To deactivate a Linked Submission Group (e.g., because the papers in that group have meanwhile been published) click on Active Linked Submission Groups in your main menu. Click on Set Inactive Status for the group to be deactivated and then on ‘OK’. The group will move to Inactive Linked Submission Groups in your main menu. The View Linked Group action link still shows which papers were associated with the group.

3.15.4 Reactivating an Inactive Linked Submission Group
Should you wish to reactivate an inactive Linked Submission Group, click on Inactive Linked Submission Groups and then on Set Active Status of the group you want to reactivate. Click on ‘OK’ to confirm and move the paper back to Active Linked Submission Groups.
3.16 Send Reminder Letters

Send Reminder Letters at the very bottom of your main menu gives you access to various reminder reports (see also sections below for more detailed information). These provide an overview of late revisions, reviews, and editorial assignments and allow you to send reminders to authors, reviewers and editors where necessary. They all work in more or less the same way: simply click on the report link, amend the parameters in so far necessary and click on ‘Submit’. Sending reminders is then a matter of ticking the relevant checkboxes in the overview and clicking on ‘Send Reminders’. Choose a letter that applies and then either customize the letters or send out the default letters. In the report results you have access to the manuscript details and history (see sections 3.1.3 and 3.1.4). If the manuscript notes flag ( yayı) is shown for a paper, please check the manuscript notes via Details (see section 3.1.3.1) before proceeding: you may find relevant editorial comments in there (for instance a request for extension).

NOTES:

➢ The reports are by default run for all manuscripts regardless of who the Handling Editor is. If you only want to see the results for your own submissions, make sure to select your own name as Handling Editor in the drop down menu at the top of the parameter page. If you only have access to your own assignments in the system, the reports will always limit the results to your own assignments.

➢ In general, only Editors-in-Chief or Editorial Offices have access to all reminder reports, so you may not have access to all of these reports, and/or may only be able to send reminders for your own assignments.

➢ When editing the parameters it is best to choose the option that will result in a list with all people who are X days past the deadline, rather than an option that will show everyone within a certain date range (e.g., within 30 days of their deadline).

➢ Each time you run a report, you can only send one type of reminder letter. If you want to send out multiple letter types (e.g., some authors or reviewers should get a 1st reminder, others a 2nd reminder, etc.), it is best to first run the reminder report for those reminders that make up the majority of the report and make notes of which type of other reminders there are (e.g. ms XXX, ref. XXX: 2nd reminder). Running the report for the other reminder type(s) is then much easier and quicker.

3.16.1 Author Reminders

3.16.1.1 Author Revision Status Report

Overview of all manuscripts out for revision. This does not take into account the actual deadline of the revision. It rather lists all manuscripts where the author was asked to revise more than X days ago, ‘X’ being the amount of time you consider normal for a revision plus extra time you normally would allow out of courtesy before sending a reminder. So, if you would normally give an author 1 month to revise and would not send a reminder until a week after the deadline, set ‘X’ as 37 days. To run the report click on Send Reminder Letters in your main menu and then on Author Revision Status Report. Fill in the minimum number of days that the papers should be out for revision (in our example, X = 37), amend the other criteria as you deem necessary, and click on ‘Submit’.

![Author Revision Status Report](image)

The system will then list all papers that meet your criteria: you can view the decision at the far right, view the manuscript Details and History, and view all sorts of other data, such as decision date and number of reminders sent.
to date. If the manuscript notes flag (♀) is shown for a paper, please check the manuscript notes via Details (see section 3.1.3.1) before proceeding; you may find relevant editorial comments in there (for instance a request for extension). Check the tick boxes for those papers for which you want to send reminders and click on ‘Send Reminders’ at the bottom of the page.

Select the appropriate letter from the drop down menu: ‘AUTHOR: 1st Revision Reminder’; ‘AUTHOR: 2nd Revision Reminder’; ‘AUTHOR: Final Revision Reminder’. Use ‘Customize Letter’ to view and/or edit any of the letters. Otherwise, click on ‘Send Reminders’ and ‘Send Reminder Letters Now’.

NOTE:
➢ If at any point, you no longer want to wait for a revision, you can set the paper's final disposition to ‘withdrawn’ (see section 3.3.3.3). Before doing so, however, we recommend that you first notify the author about this.

3.16.1.2 Author Revision Reminder Report
Overview of all revisions that have not been submitted within the revision deadline. Click on Send Reminder Letters in your main menu and then on Author Revision Reminder Report, select the middle radio button (‘Show all submissions that are X days past the revision due date’), change the number of days and the other criteria as you deem fit, and click on ‘Submit’. So, if we were to use the same example as in section 3.16.1.1, ‘X’ would be ‘7’ days, because ‘X’ in this report is the number of days calculated from the moment the revision was due. You then get the same type of overview as you would when running the Author Revision Status Report. Sending the reminders to the authors also works exactly the same (see also section 3.16.1.1 above).

NOTE:
➢ This report is run based on the revision due date as entered in Editorial Manager. If you are not using these revision due dates, this report will not work properly and you will have to run the Author Revision Status Report instead (see section 3.16.1.1).

3.16.1.3 Authors Invited – No Response Report
You can invite authors to submit a manuscript through EM (see section 4 on inviting authors) and keep track of pending invitations via Authors Invited – No Response Report on the Send Reminder Letters page. Amend the criteria as you deem fit, and click on ‘Submit’ to run the report.
You will get an overview of all invitations that meet those criteria. If the manuscript notes flag (◆) is shown for a paper, please check the manuscript notes via Details (see section 3.1.3.1) before proceeding: you may find relevant editorial comments in there (for instance a request for extension). To send reminders tick the relevant checkboxes and then click on ‘Send Reminders’. After that, select the ‘AUTHOR: Invitation Reminder’ letter from the drop down menu, click on ‘Send Reminders’ and ‘Send Reminders Now’. To customize any of the letters, first click on ‘Customize Letter’ instead of on ‘Send Reminders’.

NOTE:
➢ Papers for which the ‘Invitation Response Due Date’ is not entered in EM will not appear in the report overview.

3.16.1.4 Author Invitation Status Report
This report is also intended to keep track of invited manuscripts prior to actual submission. It checks for invited manuscripts where the author has accepted the invitation, but has not yet submitted the manuscript. Click on Send Reminder Letters in your main menu and then on Author Invitation Status Report. Select and amend the criteria where necessary and click on ‘Submit’ to run the report.

Here as well, you will get an overview of all authors meeting your criteria. If the manuscript notes flag (◆) is shown for a paper, please check the manuscript notes via Details (see section 3.1.3.1) before proceeding: you may find relevant editorial comments in there (for instance a request for extension). Check the relevant tick boxes and click on ‘Send Reminders’ to send reminders to these authors. This works in exactly the same way as the other author reminders. The letter to be selected for this report is ‘AUTHOR: Reminder (invited submission)’.

NOTE:
➢ Papers for which the ‘Submission Due Date’ and/or ‘Target Publication Date’ is not entered in EM may not appear in the report overview.

3.16.2 Reviewer Reminders
3.16.2.1 Reviewer Invited – No Response Report
Overview of all reviewers who still need to agree or decline to review: Go to Send Reminder Letters in your main menu and click on Reviewer Invited – No Response Report. By default, the report will generate a list with all
reviewers who have not responded more than X days after receiving the review request. Amend the parameters where necessary and click on 'Submit' to run the report.

The report shows which reviewers meet the criteria (e.g., no response after > 5 days), how many reminders were sent to date, etc. If the manuscript notes flag (şı) is shown for a paper, please check the manuscript notes via Details (see section 3.1.3.1) before proceeding; you may find relevant editorial comments in there (for instance a request for extension). Select the reviewers that need to be reminded by ticking the corresponding checkboxes and make a note of manuscript number and reviewer name for papers where you wish to cancel a specific review assignment and/or invite additional reviewers (you can take care of this via Search Submissions in your main menu after having sent any reminders for the other papers; see also sections 2.1, 3.3.1 and 3.3.1.2). Click on 'Send Reminders' at the bottom of the page to send the actual reminders.

On the next page, select the REVIEWER: Invitation Reminder letter, customize the letters if necessary and then click on 'Send Reminders' and 'Send Reminder Letters Now'.

3.16.2.2 Reviewer Reminder Report
Overview of reviewers who agreed to review, but have not submitted a review to date. As with all reminder reports, first go to Send Reminder Letters at the very bottom of your main menu. Then click on Reviewer Reminder Report, select the criteria you deem relevant and click on 'Submit'. The report will give you an overview of all reviewers who meet your criteria, how many reminders they have had to date, etc. If the manuscript notes flag (şı) is shown for a paper, please check the manuscript notes via Details (see section 3.1.3.1) before proceeding; you may find relevant editorial comments in there (for instance a request for extension). Select the reviewers that need to be reminded by ticking the corresponding checkboxes and make a note of manuscript number and reviewer name for papers where you wish to cancel a specific review assignment and/or invite additional reviewers (you can take care of this via Search Submissions in your main menu after having sent any reminders for the other papers; see also sections 2.1, 3.3.1 and 3.3.1.2). Click on 'Send Reminders' at the bottom of the page to send the actual reminders.
On the next page, select the appropriate letter from the drop down menu: ‘REVIEWER: Reminder (Before Due Date)’ (for reviewers whose review is due soon, but not yet overdue); ‘REVIEWER: 1st Reminder’; ‘REVIEWER: 2nd Reminder’. Customize the letter(s) if necessary and then click on ‘Send Reminders’ and on ‘Send Reminder Letters Now’.

NOTE:
- You can only send one type of reminder letter at a time when running a report. To send out multiple letter types (e.g., some reviewers should get a 1st reminder, others a 2nd reminder, etc.), it is best to first run the report for those reminders that make up the majority of the report and make notes of which type of other reminders there are (e.g. ms XXX, ref. XXX: 2nd reminder). Then repeat the report run for the other reminder type(s).

3.16.3 Editor Reminders

3.16.3.1 Assignment Status Report

Overview of all mss in the pipeline that are currently in the hands of an editor from the moment when an editor has been assigned until the point where a decision has been taken and the author has been notified of the decision. To run the report, go to Send Reminder Letters and then Assignment Status Report (in ‘Editor Reports’ section). Simply select ‘All Editors’ from the Handling Editor drop down menu at the top and click on ‘Submit’.

The little triangles in the various column headers in the report results allow you to sort the data in the report on that particular column (in ascending/descending order). We suggest to sort the report by Document Status Date (3rd column from the right). You can decide for yourself whether any of the papers are problematic (check details and history). As some editors may have multiple problematic papers, you may rather want to make a list of the problematic manuscript numbers and then send that to the editor(s) concerned outside of EM. You can always make a note about having reminded the editor in the manuscript notes of the papers concerned (see section 3.1.3.1).

NOTES:
- The status may be based upon the date when the last reviewer agreed/submitted a review/was invited, so it may very well be that some of the review deadlines are not even expired yet.
- The following papers are excluded from this overview: new and revised submissions that have not yet been assigned, papers out for revision and rejected/accepted papers that still need to have the final disposition set.
- Only the journal's main editor and/or editorial office will generally have access to these editor reminders.
3.16.3.2 New Assignments Report
Overview of editors who have been assigned to a manuscript but have not taken further action since. This report allows you to narrow down the results so that they only include papers that were assigned more than X days ago.

Go to Send Reminder Letters in your main menu and in the 'Editor Reminders' section click on New Assignments Report. Tick and untick the checkboxes for the editors as appropriate (Check All will automatically tick all boxes; Clear All will uncheck all of them). Enter a number of days into 'Show All Submissions with more than X elapsed days since the Editor was assigned or invited' and click on 'Submit'. 'X' is what you consider a reasonable amount of time for an editor to take action on a manuscript. If you do not fill in a number, the overview will include all mss for which an editor has been assigned but has not taken action yet. You can decide for yourself whether any of the papers are problematic (check details and history). As some editors may have multiple problematic papers, you may rather want to make a list of the problematic manuscript numbers and then send that to the editor(s) concerned outside of EM. You can always make a note about having reminded the editor in the manuscript notes of the papers concerned (see section 3.1.3.1).

NOTES:
- Revisions may easily end up in this report if they need not be sent for further review; the editor may of course need time to evaluate them himself in detail before taking a decision.
- Only the journal's main editor and/or editorial office will generally have access to these editor reminders.

3.16.3.3 Required Reviews Complete Report
Overview of all papers for which the reviews are complete but for which the editor still needs to take a decision. Go to Send Reminder Letters in your main menu and in the 'Editor Reminders' section click on Required Reviews Complete Report.
Tick and untick the checkboxes for the editors as appropriate (Check All will automatically tick all boxes; Clear All will uncheck all of them). Enter a number of days into 'Show all assignments where the required number of reviews have been complete for more than X day(s)' and click on 'Submit'. X is what you consider a reasonable amount of time for an editor to take action on a manuscript once all reviews are in. If you do not fill in a number, the overview will include all papers for which the reviews are in. You can decide for yourself whether any of the papers are problematic (check details and history). As some editors may have multiple problematic papers, you may rather want to make a list of the problematic manuscript numbers and then send that to the editor(s) concerned outside of EM. You can always make a note about having reminded the editor in the manuscript notes of the papers concerned (see section 3.1.3.1).

NOTES:
- Check the Details: in some cases, the number of required reviews may be complete, but there may be other pending reviews (e.g., additional review requested in case of initial conflicting reviews).
- Only the journal's main editor and/or editorial office will generally have access to these editor reminders.

4. Proposal Menu: Inviting Authors
If you want, you can solicit manuscripts via EM: You can invite authors to submit for instance, a book review, a special issue paper, or any other type of commissioned paper you can think of. Inviting authors works very similar to inviting reviewers: You have two tabs at the top of your main menu: the 'Editorial' tab, which is shown by default after you have logged in, and the 'Proposal Menu' tab.

Inviting authors is always done via the 'Proposal Menu' tab. The label 'Proposal' is used to describe the subject you wish to invite an author for, e.g., a Special Issue. Say, you are organizing a Special Issue on a particular subject, then the Special Issue would be the 'proposal' for which you solicit papers. To create a new proposal, click on Initiate Proposal in your Proposal Menu. Then choose the appropriate type of proposal (e.g., 'Special Issue', 'Invited Submission') from the drop down menu. Once selected, the page will refresh.
On the next page, preselect the article type that the author should use for submission from the second drop down menu. Then fill in a (short) ‘Title’ of the Special Issue you are soliciting papers for. You will also need to enter a target publication date (‘author response due’ and ‘author submission due’ dates are calculated backwards from this date). Both the author response due and submission due dates are used in the various letters associated with author invitations so without a target publication date, there will be blank spaces in your letters instead of actual due dates. These due dates can still be amended before you send the invitation letters. Click on ‘Assign to Myself and Invite Authors’ and on the Author Selection Summary page click on ‘Go’ to invite one or more authors.

Fill in the last name of the person you wish to invite and click on ‘Search’ (if you do not get search results, use Register and Invite New Author). In the search results, tick the checkbox in front of the person you wish to invite, scroll down and click on ‘Proceed’. Select the appropriate letter from the drop down menu; click on Customize if you want to edit the letter (then click on ‘Save’ to save your changes and return to the previous page). Before sending the invitation letters, check and if necessary amend the ‘Invited Author Response Due Date’ and ‘Author Submission Due Date’. If desired, you can already suggest a title for the article to be used by the author by filling in a ‘Full Title’. If you require the author to use your suggested title, tick the ‘Lock Title(s) for Author’ check box. When ready click on ‘Submit’ to send the author invitation letters.
The ‘Author Selection Summary’ page now gives an overview of the author(s) you have invited.

To add alternate authors (who will be invited automatically as soon as an invited author declines online), change the ‘Search for Authors’ selection in the drop down menu on the ‘Author Search’ section to ‘Search for Alternate Authors’ and repeat the steps as described above. When an invited author eventually submits a manuscript, this will pop up in New Submissions Requiring Assignment in your Editorial Main Menu, same as any other new papers. You can keep track of outstanding author invitations via the reminder reports described in sections 3.16.1.3 and 3.16.1.4.

To cancel outstanding invitations or author assignments, click on Un-invite or Un-assign next to the person’s name on the Invite Authors (=Author Selection Summary) page. To invite additional authors for an existing proposal, look up the proposal and click on the Invite Authors action link.

NOTE:
- Book Reviewers are considered AUTHORS, soliciting Book Reviews has to be done through the Proposals menu and the book reviewers need to log on as authors and submit their review as a new (or in case of later versions, revised) submission.