Visual Guide to Editorial Manager
The following is the step-by-step process for the submission and handling of manuscripts on this system.

I. How to log into Editorial Manager?

II. Editor Main Menu

III. Manuscript has been submitted

IV. Assign Editor

V. Invite Reviewers

VI. View Completed Reviews and Reviewer Attachments

VII. Make a Publishing Decision and Notify the Author

VIII. Reminders
I. How to log into Editorial Manager?

Enter Your Username and Password, click Editor Login.
II. Editor Main Menu

**Note:** For the purposes of this tutorial, the Editor role will be referred to as ‘Editor.’ If any of the features shown in this menu or tutorial are not visible to a particular role, the journal has not assigned that permission for the ‘Editor role’.

The Editor Main Menu is divided into sections.

**Overview of Editor Main Menu**

**Editor Main Menu**

**Search**
The Search Menu is split into two main areas – Search Submissions and Search People. It will be located on the Main Editor Menu as long as the Editor has the permission to access these features. There is a separate section within this Tutorial that specifically covers Search Submissions and Search People.

**View All Assigned**
yields a list of all manuscripts that have been assigned to all Editors for which the Editor has not yet made a decision.

<table>
<thead>
<tr>
<th>Submissions With:</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Reviews Complete</td>
</tr>
<tr>
<td>1 Review Complete</td>
</tr>
<tr>
<td>2 Reviews Complete</td>
</tr>
</tbody>
</table>

**Submissions With:**
This grid shows how many submissions have 1, 2, 3, or 4 reviews complete. By clicking on any of the hyperlinks the Editor is provided with a list of submissions based on the number of reviews that have been finished. Only submissions for which the Editor is the ‘Handling Editor’ are displayed. The grid only reflects submissions with at least one review complete that are in the Editor’s ‘To-Do’ List folders.

**Editor ‘To-Do’ List**
Listed within this section are a number of ‘folders’ or ‘links’ to different menus. EM will automatically move papers between these folders as the paper moves through the peer review process.

| View All Assigned Submissions (75) |
| View All Assigned Submissions Being Edited (30) |

| Subordinate Editor’s Pending Assignments (75) |
| Group by Editors I Assigned |
| Group by Editor with Current Responsibility |
| Group by Manuscript Status |
Most important part of the menu: The Editor-To-Do List

Editor 'To-Do' List

My Pending Assignments (53)
New Assignments (3)
- Submissions with Required Reviews Complete (20)
- Submissions Requiring Additional Reviewers (19)
- Submissions with One or More Late Reviews (11)

Reviews in Progress (11)
- Reviewers Invited - No Response (0)
- Submissions Under Review (11)

New Assignments
Here Editors will find manuscripts that have been assigned to them. Editors can assign subordinate Editors, invite Reviewers or make a decision on manuscripts from this folder.

Reviews in Progress

Reviewers Invited - No Response
Folders below this heading contain submissions that are waiting for Reviewer Action. These submissions need to have Reviewers agree/decline invitation, or submit recommendations.

Submissions Under Review
Any manuscript with assigned Reviewers can be found in the ‘Submissions Under Review’ folder. From here, Editors can invite additional Reviewers or submit an editorial decision without waiting for a delinquent Reviewer’s response.

Submissions with Required Reviews Complete
This folder contains any submission or revised submission that has had all required reviews submitted or on which a subordinate Editor has made a Decision recommendation, or the Editor began a Decision and saved it to submit later.

Submissions Requiring Additional Reviewers
This folder contains any submission that has fewer than the Required Number of Reviewers invited/assigned.

Submissions with One or More Late Reviews
This folder contains manuscripts with Reviewers assigned to them that accepted their invitation, but have yet submitted their review.

Note: Same paper might be available in one or more folders based on the status.
III. Manuscript has been submitted:

Editor Main Menu:

- Click “New Assignments”.

Revealing the Action Links:

- Next to the word “Action”, click the plus sign [+] to see the list of Action Links. Alternatively, you can hold your mouse over the “Action Links” button to reveal the list of Actions you can take for this manuscript.
See the ‘Action Links’ revealed below:

The EiC can either make an immediate decision on the manuscript (see VII) or select and invite reviewers (see V) or assign the manuscript to one of the associate editors (see IV).

Further actions: Viewing the Manuscript, Details and History, Send e-mails.

- Click "View Submission" to view the manuscript.
- Click "Details" to view author information, keywords, author comments, Editor information and reviewer information. Within "Details", you can also make notes about the manuscript, change reviewer and author due dates.
- Click "History" to view status history of the manuscript as well as the correspondence that has been sent out for that manuscript, through the system. You can also re-send letters through the correspondence.
- Send E-mail option in the Action Links: is also referred to as an 'Ad Hoc' e-mail and allows communication between people associated with the submission. Editors, Authors or Reviewers can send e-mail messages using this option, for example: to provide instructions, clarify a point, make a request, etc. ‘Ad Hoc’ e-mail feature includes ‘pre-configured’ letters that can be sent by specific roles, to specific individuals. Click on the down arrow to view the letters that have been configured for the Editor role.
Select the letter that best matches the enquiry, and click on the button labeled 'Customize Letter'. The text can be modified as required.

**Note** It is highly recommended to use the send email option for communication with any user (author/reviewer/editor) of a paper, as they get registered in the History of the manuscript and we could have a track of all the communications done with respect to the paper.
IV. Assigning/Inviting an Editor:

There are two ways in which Editors get assigned to submissions, depending upon the journals requirement and configurations:

**Assignment (Mode)** - Editors in EM can be assigned to papers, without being given the opportunity to Decline the assignment.

**Invitation (Mode)** - Editors are sent an e-mail invitation asking them to take on an assignment. The Editor must Agree or Decline to take the assignment.

To assigninvite an Editor click on the “Assign Editor” link, select an appropriate Editor from the list of subordinate editors and then click on the ‘Send Custom Letter’ to send a customized letter to the Inviting/Assigning editor.

Select an appropriate letter from the pull down menu. Click on the “Customize” link to view the assignment letter and to incorporate any specific comments for the editor regarding the paper.

Click on the “Confirm Selection and Send Letters” button to complete the assignment process.
If the journal follows an **Assignment Mode**, the new assignment will appear in the 'New Assignments' folder, for the subordinate Editor.

If the journal follows the **Invitation Mode**, the new assignment will appear in the 'New Invitations' folder and he will have the options: "**Yes I will take this Assignment**" and "**No I will not take this Assignment**" in the action links to either accept or decline the assignment. Only when the Editor agrees to the invitation, he becomes an Assigned Editor. The manuscript is then sent to the 'New Assignments' folder, and follows the usual path.
The Invite Reviewers link can be used throughout the peer review process for inviting reviewers, until a decision has been made on the paper and the author has been informed.

When an editor clicks on the 'Invite Reviewers' link, the 'Reviewer Selection Summary' window pops up.

Note: You will not be able to assign the paper to an alternate editor once reviewers are invited for the manuscript.

Step 1: Click "Invite Reviewers".

Step 2, optional: On the “Reviewer Selection Summary” screen, the number of required reviews, and days after Reviewer gets un-invited or un-assigned if late, are customizable.

Step 3: The different modes of reviewer search available while inviting reviewers:

- Search for Reviewers
- Search by Classification Matches
- Search by Personal Classifications
- Suggested by Author
- Suggest Reviewers
- Select from Previous Reviewers (Note: this is for revised submissions).

The default search option available in EM is the “Search for Reviewers”. The alternatives will be shown later.

Click “Go” to view the reviewers in the database.
The Editor may search for either a specific Reviewer role or All Reviewer roles or the Entire database:

In the "Value" box, type in the reviewer’s last name. Then click “Search”.

**Hint:** To see the complete list of available reviewers in alphabetical order, go to the first Value box insert one space. Then click “Search”.

**Step 4: Selecting reviewers:**

- Scroll down through your reviewer candidates. You can select as many reviewers as you wish, but remember, there is a minimum number of required reviews as indicated in Step 2 above.
- To invite a reviewer, click the Inv. box and for selecting alternate reviewers click Alt. to the left of the reviewer’s name.
- Scroll to the bottom and click Proceed.
If your candidate is not amongst the listed persons, you can easily register somebody new: see Register and Invite New Reviewer

**Reviewer Candidates**

Select a checkbox by each person you wish to select as a Reviewer (more...).

Page: 1 of 1 (1 total Reviewers)  Display 100 results per page.

<table>
<thead>
<tr>
<th>Select</th>
<th>Inv.</th>
<th>Inv. (=Invite)</th>
<th>Alt. (=Alternate)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Inv. (=Invite)** - By checking this box, the Reviewer will be immediately invited and sent an invitation letter. Once invited, Reviewers will appear in the Selected Reviewers section on the Reviewer Selection Summary menu.

- **Alt. (=Alternate)** - By checking this box, the Editor chooses Alternate reviewers who can be automatically promoted if an invited reviewer declines the invitation or if EM is set to automatically 'Un-invite' a reviewer who has not responded to an invitation.

**Step 5: Confirm reviewer selections, change the due date and send the letters.**

- Confirm your reviewer selections and the letter to be sent.
- **Please Note**: There are different letters for the **original version** and **revised version** of the manuscript. Click the drop down button to see your choices.
- If necessary, you can change the due date.
- To edit the invitation letter, click **Customize**.
- Click "Confirm Selections and Proceed" to send the invitation letters.
Alternative Reviewer Search Modes: Search by Classification Matches

If your journal is using the "Classifications" feature for manuscripts and for reviewers, in step 3, you can change the search mode to "Search by Classification Matches". Then click "Go".

Search Reviewers by Classification for Manuscript Number BLTRIAL-D-07-00031R1
"Risk analysis and injury surveillance"

The Editor may select one or more Classifications.
A list of Reviewers associated with the selected Classifications is displayed. The Manuscript Classifications are listed at the top of the page.

### Reviewer Candidates

Select a checkbox by each person you wish to select as a Reviewer (more...).

<table>
<thead>
<tr>
<th>Classification</th>
<th>Number of Reviewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amino acids</td>
<td>26</td>
</tr>
<tr>
<td>Diseases</td>
<td>27</td>
</tr>
<tr>
<td>Enzymes</td>
<td>25</td>
</tr>
</tbody>
</table>

Go ahead with Step 4 as described above.

**Alternative Reviewer Search Modes: Search by Personal Classification**

If your journal is using Classifications for Reviewers, you can pick the “Search by Personal Classification” mode. Then click “Search for Reviewers”.

### Search for Reviewers by Personal Classifications

On the left, below, is the complete list of Classification Terms currently assigned to people in this publication. Classification terms that are not assigned will not appear in the list. If you want to search for potential Reviewer candidates associated with particular Classifications, transfer classifications to the “Selected Classifications” list by checking them and using the “Select...” button. Then click “Search for Reviewers” to execute the search. A maximum of 5 Classifications may be selected in any given search.

Change Search Type

- Search My Publication
- Search by Personal Classifications
- From: All Reviewers
- Go

Help with Searching

The Classifications for this manuscript are:

- Amino acids
- Diseases
- Enzymes

[Search For Reviewers]
All the Classifications that are assigned to people in the system are displayed with a checkbox next to each term. The Editor can select the desired Classification Terms and then click on the 'Select' button to move them into the Selected Classifications section. A list of Reviewers associated with the selected Classifications is returned.

Go ahead with Step 4 as described above.

**Alternative Reviewer Search Modes: Search from Previous Reviewers**
Go ahead with Step 4 as described above.

**Alternative Reviewer Search Modes: Search for Reviewers Suggested by Author**

If the journal has the 'Suggest Reviewers' submission step, Authors may 'suggest' one or more Reviewers that they feel would be suitable to review the paper. The Editors may invite these reviewers using the search mode 'Suggested by Author'. This feature will be present on all Reviewer Search pages as long as the Author has suggested at least one Reviewer.

When this search mode is used, the system takes the E-mail Address(es), Last Name(s), and First Name(s) entered by the Author on the Suggest Reviewers submission step and executes a search to identify possible matches in the system.
A new 'Reviewers Suggested by Author' box is displayed, listing the Reviewer information.

Go ahead with Step 4 as described above.

If any Reviewers suggested by the Author are not registered in EM, a new section is displayed that lists each Reviewer with a 'Register and Select New Reviewer' link next to each person’s name, so that the editor can easily register the person and select them as a Reviewer for the submission.
If your search did not yield results: Make sure that the person is not in the database

Sometimes the search for a specific person did not yield results. In this case you can easily register and invite a new reviewer. However, first it should be made sure that this person is not in the database.

When a person’s name cannot be found, search for the e-mail address as an alternative:
Please also check whether the person is in the database, but without reviewer role. In this case you can easily assign the reviewer role and invite this person.

Change the search type to search not from “All reviewers”, but from “Entire Database”:

In the further invitation process you will be asked to assign the reviewer role to this person before actually inviting him/her.

**Assign Reviewer Role**

All Reviewer candidates must be assigned a Reviewer Role before being invited to review. Please assign a Reviewer Role to the people who do not yet have roles. You can also check ‘Do not use this Person’ if you decide not to invite them.

**Register and Invite New Reviewer**

If your search did not yield a result, you can add a new reviewer to the database and invite this person. You find the link "Register and Invite New Reviewer" on all reviewer search pages, partly in the top and the bottom again.
Type the reviewer’s first name, last name and email address and click “Submit”.

**Note:**

When proxy registering a reviewer, if the user is already registered with the journal the below error message pops up.

In this case, please perform the steps as described above under *If your search did not yield results: Make sure that the person is not in the database*

If the user is not in the database, the Proxy Registration Page will open. Select the “Reviewer Role” and “Country”. Then click “Register and Do NOT Send Letter”.

The new reviewer will be listed as reviewer candidate. Please go ahead with Step 4 in the reviewer invitation process.
VI. View Completed Reviews and Reviewer Attachments

Once an invitation has been sent and reviewer agreed, the reviewer will send his review back. The handling editor will receive a notification from the system once the reviews have been completed for a paper (depending on the number of required reviews which is set for a submission). After the Editor has received this message, he/she logs in, views the reviewer comments and submits his/her decision through EM.

Step 1: Locate the appropriate manuscript.

Step 2: View the reviewers’ comments: Click "View Reviews and Comments"

| Trial | Jona’s Experiments 2006 | Balance of Power | Maria Irene Aloha Cubillan, Ph.D. | 10/27/2006 | 02/19/200
|-------|--------------------------|------------------|---------------------------------|------------|--------|

Step 3: Click the Recommendation Term next to the reviewer’s name:

**View Reviews and Comments for Manuscript**
**TRIAL16-D-06-00069**
**“Balance of Power”**
**Revision 1**

<table>
<thead>
<tr>
<th>View Reviewer Attachments (1)</th>
<th>View Manuscript Rating Card</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revision 1</td>
<td>Original Submission</td>
</tr>
<tr>
<td>Katherine Varones Marcel, Bachelor’s/College degree, (Reviewer 1)</td>
<td>(None)</td>
</tr>
<tr>
<td>Charlie Bondoc, M. (None)</td>
<td>(None)</td>
</tr>
<tr>
<td>Christine de Leon Barroca</td>
<td>Reviewer Invited (None)</td>
</tr>
<tr>
<td>Jonathan Cristolo, M.D.</td>
<td>Reviewer Invited (None)</td>
</tr>
<tr>
<td>Jona Editor, A.</td>
<td>Reviewer Invited (None)</td>
</tr>
<tr>
<td>Jona Editor, A. (Editor-in-Chief)</td>
<td>No Decision</td>
</tr>
<tr>
<td>L. Deccuito, MD. (Jan07 EIC)</td>
<td>No Decision</td>
</tr>
<tr>
<td>Author Decision Letter</td>
<td></td>
</tr>
</tbody>
</table>

Step 4:
- View the confidential comments to the Editor.
- View the comments to the author.
Step 5: If a reviewer has attached a file, click “Attachments”.

View Reviews and Comments for Manuscript

Click the recommendation term to view the comments for the submission.

<table>
<thead>
<tr>
<th>Attachments (21)</th>
<th>View Manuscript Rating Card</th>
<th>View Review Question Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Reviewer 1)</td>
<td>Minor revisions</td>
<td></td>
</tr>
<tr>
<td>Editor in Chief</td>
<td>Reviewer Invited</td>
<td></td>
</tr>
<tr>
<td>(Author)</td>
<td>Reviewer Invited</td>
<td></td>
</tr>
</tbody>
</table>
Step 6:
- Click “Download” to view the file.
- Click “Allow Author Access” and/or “Allow Reviewer Access” to allow the author and other reviewer’s access to the attached file.

<table>
<thead>
<tr>
<th>Action</th>
<th>Uploaded By</th>
<th>Editor Who Uploaded</th>
<th>Description</th>
<th>File Name</th>
<th>File Size</th>
<th>Upload Date</th>
<th>Allow Author Access</th>
<th>Allow Reviewer Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original Submission</td>
<td>N/A</td>
<td>N/A</td>
<td>One One Lovely Attachment</td>
<td>Reviewer Attachment.doc</td>
<td>25.5 KB</td>
<td>Feb 6 2008 9:44AM</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Download Sanitized Copy</td>
<td>Joey Justin</td>
<td>N/A</td>
<td>Two Two Lovely Attachments</td>
<td>Reviewer Attachment.doc</td>
<td>25.5 KB</td>
<td>Feb 6 2008 9:44AM</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Upload Revised File</td>
<td>N/A</td>
<td>N/A</td>
<td>Two Attachments</td>
<td>Reviewer Attachment.doc</td>
<td>25.5 KB</td>
<td>Apr 16 2010 4:23PM</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Original Submission</td>
<td>N/A</td>
<td>N/A</td>
<td>Editor Attachment</td>
<td>Attachment 0.doc</td>
<td>21.5 KB</td>
<td>Apr 23 2010 3:20PM</td>
<td>☑</td>
<td>☑</td>
</tr>
</tbody>
</table>

Note:
When a Reviewer or Editor uploads an Attachment, a sanitized copy of the uploaded attachment is made with the personal information removed (e.g. author information in the document properties). Sanitization is done for Word, Excel and PowerPoint files and PDFs.
Editors submit their Decisions by clicking on the Action link called ‘Submit Editor’s Decision and Comments’. This allows an Editor to be able to make a decision at any stage of the peer review (also before reviewers have been invited).

**Step 1:** Click “Submit Editor’s Decision and Comments”:

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Article Type</th>
<th>Article Title</th>
<th>Author Name</th>
<th>Initial Date Submitted</th>
<th>Status Date</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Submission Details</td>
<td>TRIAL16-D-06-0000282</td>
<td>Fax</td>
<td>The Big Friendly Giant</td>
<td>Maria Lish Alosa Cubilan, Ph.D.</td>
<td>10/27/2006</td>
<td>02/20/2007</td>
<td>Received</td>
</tr>
</tbody>
</table>

**Note:** If there are outstanding Reviews or Reviewer Invitations then the following page will be displayed, where the editor can terminate the review assignments by sending a customized or default letter. After the reviewer assignments or invitations have been terminated, the process will go on as usual (Step 2).
Step 2: Select the appropriate decision from the drop-down box and click “Proceed”.

**Note:**

There are two boxes here which will be populated with the reviewers’ comments. The Editor will be able to edit the reviewers’ comments, if desired.

The comments appearing in the box ‘**Comments to Author**’ will be inserted in the decision letter. The Editor can either add their own comments in the box ‘**Comments to Author**’ or they can add it later in the decision letter if they have notify author option.
Step 3: Double-check your decision and click “Proceed”

Step 4: Notify the author of your decision:

- Subject line of the letter is editable
- Click the ‘cc’ box to send a copy of the letter to the Editor(s).
- Editor may also change the final Decision from the Notify Author page. A dropdown box labeled Modify Decision facilitates this. Changing the Decision Term will automatically insert the appropriate Decision letter in the editable box lower down on the page.
➢ To edit the decision letter, scroll through the “Letter Body” and type your comments directly into the letter. Comments to the Author from the reviewers will automatically appear at the end of the revision and rejection letters.

➢ Click “Send Now” to send the letter.
IX. Reminders:

Automatic Reviewer and Author Reminders have been enabled across almost all the journals.

Editors can also send reminders to the Reviewers or Authors manually.

Send Reminder Letters

Send Reminder Letters provides direct access to the many options available to Editors who may wish to send Reminder Letters to Authors and Reviewers.

Author Reminder Reports
- Author Revision Status Report
- Author Revision Reminder Report
- Automated Author Revision Reminder Report

Invited Author Reminder Reports
- Authors Invited - No Response
- Author Invitation Status Report

Editor Reminder Reports
- Assignment Status Report
- New Assignments Report
- Required Reviews Complete Report

Reviewer Reminder Reports
- Reviewer Invited - No Response Report
- Reviewer Reminder Report
- Automated Reviewer Reminder Report

Reviewer Reminder Reports:
The below are the two reports by which the editor can send reminder letters to the Reviewers.

1. The ‘Reviewer Invited - No Response Report’ generates the list of outstanding Reviewer invitations.

2. The ‘Reviewer Reminder Report’ generates the list of submissions that have been out for review for a specified number of days, exposing Reviewers whose due dates are approaching (‘Due Date’ is in the future) and/or Reviewers who are late (‘Due Date’ has passed). Editors can also enter an explicit date range, which exposes reviews due within the specified timeframe; this may include both reviews that are late and reviews that are not yet due.

**Author Reminder Reports:**

1. **Author Revision Status Report** – lists the Authors who have revisions out for more than a certain number of days.

2. **Author Revision Reminder Report** – (only relevant for journals using Author Revision Due Date functionality) this report lists the submissions that are late (Revision Due Date has passed) and/or submissions whose due date is approaching (Revision Due Date is in the future).

*We hope this visual guide was helpful to you in navigating through the Editorial Manager (EM) system. For any queries or concerns regarding EM, please feel free to write to the responsible JEO Assistant by clicking on the ‘Contact US’ button in the Navigation bar of the journal web site. Should there be any queries regarding a particular manuscript, kindly trigger an email using the ‘Send Email’ option to the intended recipient (author/reviewer/Editorial Office).*