Admin Guide

ScholarOne Manuscripts
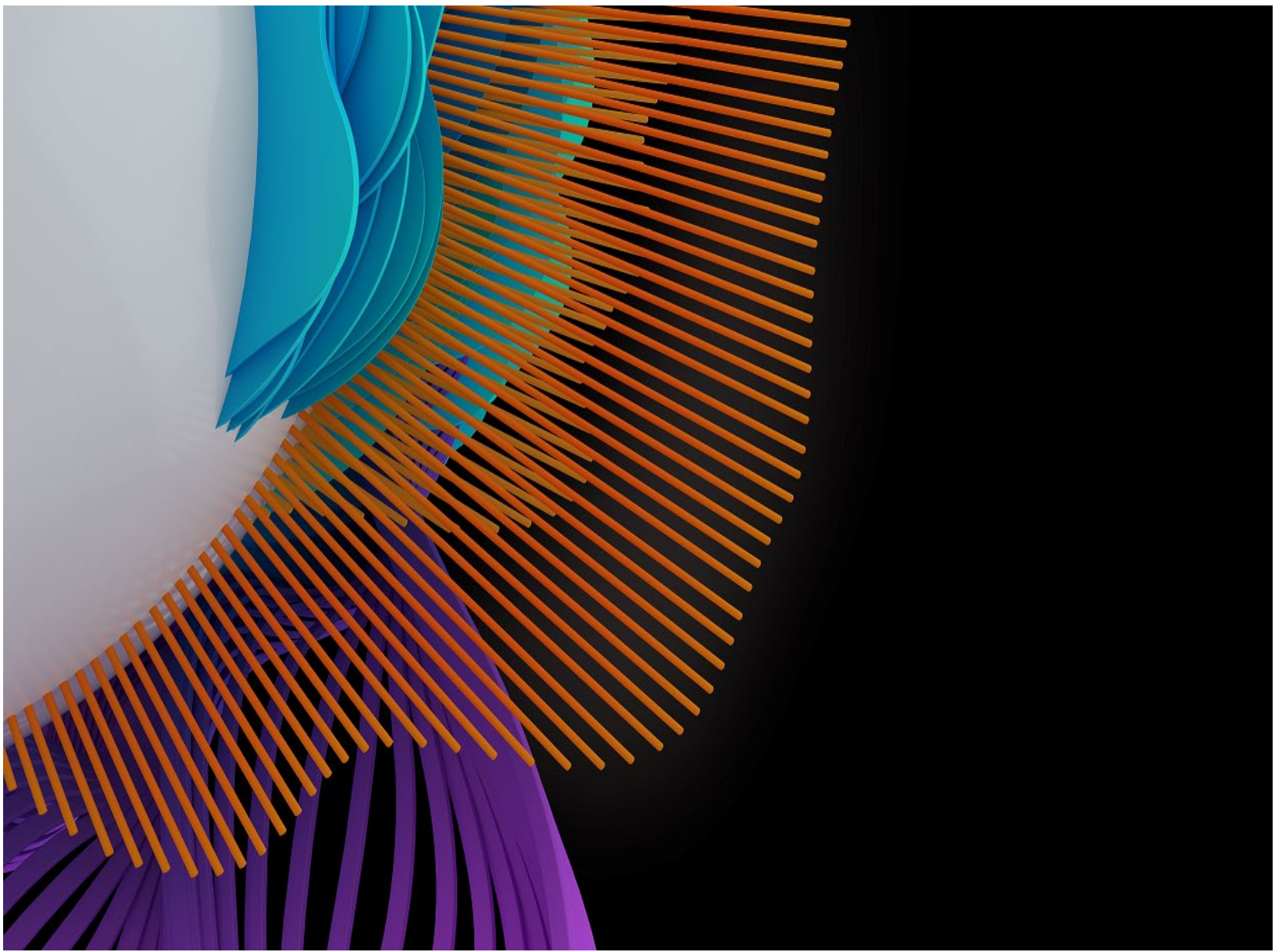
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Introduction

USE SCHOLARONE SUPPORT & FAQS

As a *ScholarOne Manuscripts* Admin, one of your greatest help tools is ScholarOne's Frequently Asked Questions tab on our help site, *ScholarOne Manuscripts* Support. Our FAQs provide immediate answers to common user questions.

In addition, the site offers downloadable guides (such as this one), video tutorials, and the ability to create a case to get assistance from our Support team. We recommend that you bookmark our help site and consult it often.

SITE CONFIGURATION AND THIS DOCUMENT

ScholarOne Manuscripts is configured for your specific site based on the needs of the journal or publisher. The role names and fields used in this document may differ from your site. The essential functions will be the same; however, you may not have some of the configurable options available to you.

SCHOLARONE MANUSCRIPTS OVERVIEW

SAMPLE REVIEW PROCESS

The *ScholarOne Manuscripts* system can be configured in many ways to suit the needs of a journal. For the purposes of this guide, the sample review process shown below has been used to demonstrate the tasks and features of the system.
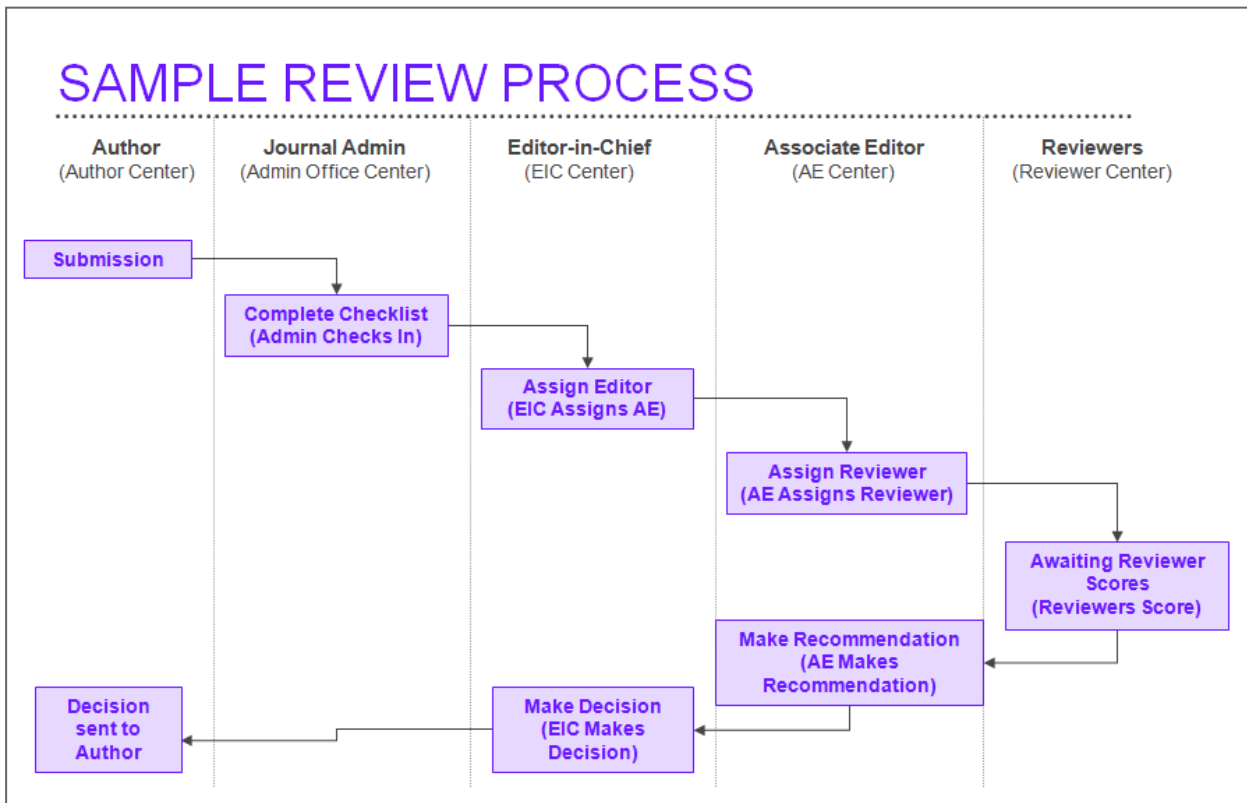
REVISED AND RESUBMITTED MANUSCRIPTS

A manuscript may go through several versions while in the peer review process. *ScholarOne Manuscripts* has workflow options for revised and resubmitted papers.

Manuscript Version	Definition
Original	The first time the author submits the manuscript
Revised	Author is asked to make changes to the paper The Manuscript ID is appended with an ".R1" The revised submission is linked with the original in the version history
Resubmission (if configured for your site)	Author is sent a decision of Revise and Resubmit The paper will receive a new Manuscript ID when resubmitted The resubmission is linked with the original in the version history

USER ROLES AND FUNCTIONS

A *ScholarOne Manuscripts* site is organized around **Centers**, each one a logical destination for peer review participants. *ScholarOne Manuscripts* accommodates all possible user role types in the peer review process including Authors, Editors-in-Chief, Associate Editors, Reviewers, Administrative Staff and Boards of Editors.

Note: Roles are configured specifically for your journal; role names may be different, and you may have more or fewer roles than shown in the example here.

Administrative Center

The Administrative Center allows the journal's administrative staff to check-in submitted manuscripts and to monitor the full review process. This is also where you perform your *ScholarOne Manuscripts* administrative tasks such as setting up user accounts, and creating e-mail templates, etc.

Key features of the Admin Center include:

- Peer Review Process Functions

    o Quick links and summaries to all submitted manuscripts

    o Proxy function with 'Logged in as' user display

    o Advanced search capability including the ability to save frequently used searches

    o Ability to edit all author-submitted manuscript data

- Administrative Tools and Functions:

    o Audit trail of all letters and actions by manuscript

    o Unique set of email templates for each manuscript status workflow and task

    o Generation of broadcast emails

    o Journal-specific instructional text on each page

    o Selection and merge capability for duplicate user accounts

    o Management of all files associated with a manuscript

    o Generate and create reports on manuscript and user activity

Associate Editor Center

The Associate Editor Center is used to invite and assign reviewers as well as make recommendations or final decisions. The Associate Editor center displays only manuscripts assigned to the specific AE.

Key features of the Associate Editor Center include:

- Workflow configuration allows the tasks of reviewer selection, invitation, and assignment to be completed by a single Associate Editor, or to be divided among a combination of users

- Selection of reviewers by Quick Search, Advanced Search, Related Papers or Keyword Matching

- Ability to add reviewers "on-the-fly" to journal database with e-mail notification to potential reviewer and enforcement of journal-required fields for account creation

- Ability to grant reviewer deadline extensions

- Sending final e-mail commits decision (workflow dependent)

- Ability to make recommendations to EIC (workflow dependent)

Author Center

The Author Center is used for submitting manuscripts and tracking manuscript status. The Author center displays only manuscripts submitted by the specific author.

Key features of the Author Center include:

- Quick links and summaries for all manuscripts submitted

- Display of recent manuscript-related correspondence

- Prompts for creating revision and resubmission manuscripts

- Check status and progress of submitted manuscripts

- Check for existing co-authored manuscripts

- Easy manuscript upload with multiple files and upload progress indicators

- Validation of complete submission process

Editor-in-Chief Center

The Editor-in-Chief Center is used for receiving and reviewing manuscripts, assigning Editors, and making decisions.

Key features of the Editor-in-Chief Center include:

- At-a-Glance statistics display for journal site

- Select Associate Editor by dropdown selection list or search field

- Tabs for viewing manuscript information, audit trail, and file management

- Immediate decision capability

- Make final decisions based on AE and/or reviewer recommendations" (workflow dependent)

Reviewer Center

Reviewers access manuscripts for review through their Reviewer Center.

Key features of the Reviewer Center include:

- Newly added reviewers are required to complete and update their User Profile before proceeding

- Pan and zoom capabilities on HTML- embedded figures and images

- Links to specified database targets like PubMed for automated referencing

- Manuscript status and final decision can be displayed on completed reviews

Production Center

ScholarOne Manuscripts also provides you with the capability to include a Production Center for accepted manuscripts.

As specified by the journal, Production Editors are allowed to:

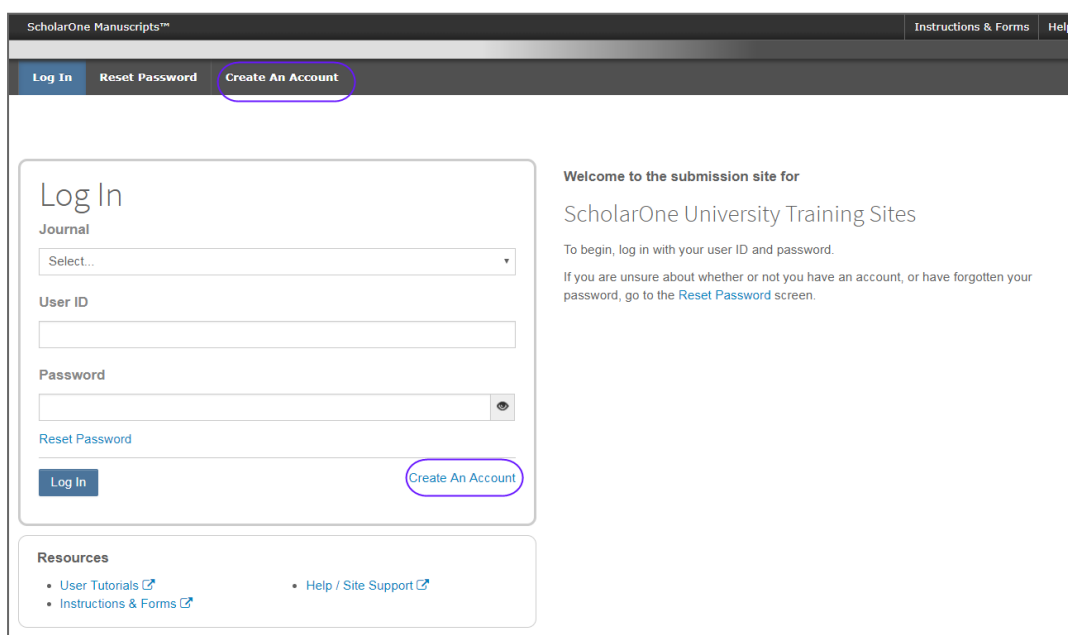- Send the Author a web-ready PDF of the manuscript for final approval (First Look™), if configured

- Track and approve electronic copyright and disclosure forms, if configured

- Review accepted manuscripts for adherence to a production checklist

- Create manual or automated batches for export

- Assign accepted manuscripts to a batch for exporting

- Create and manage journal volumes and issues

ACCESSING SCHOLARONE MANUSCRIPTS

CREATING YOUR USER ACCOUNT

As an admin, you will need to create your user account and then ScholarOne Implementation or Customer Care teams will need to add the administrative role to your account. Alternately, the journal may create your account in advance and you will edit your account to complete the details.

Each journal's site has a unique web address that is sent to you by email. To access the site, click the link within the email or enter the web address (URL) in the address field of your browser. If the journal has not already created an account for you, you can create your user account. To begin, click the **Create An Account** link on the journal's Log In screen.
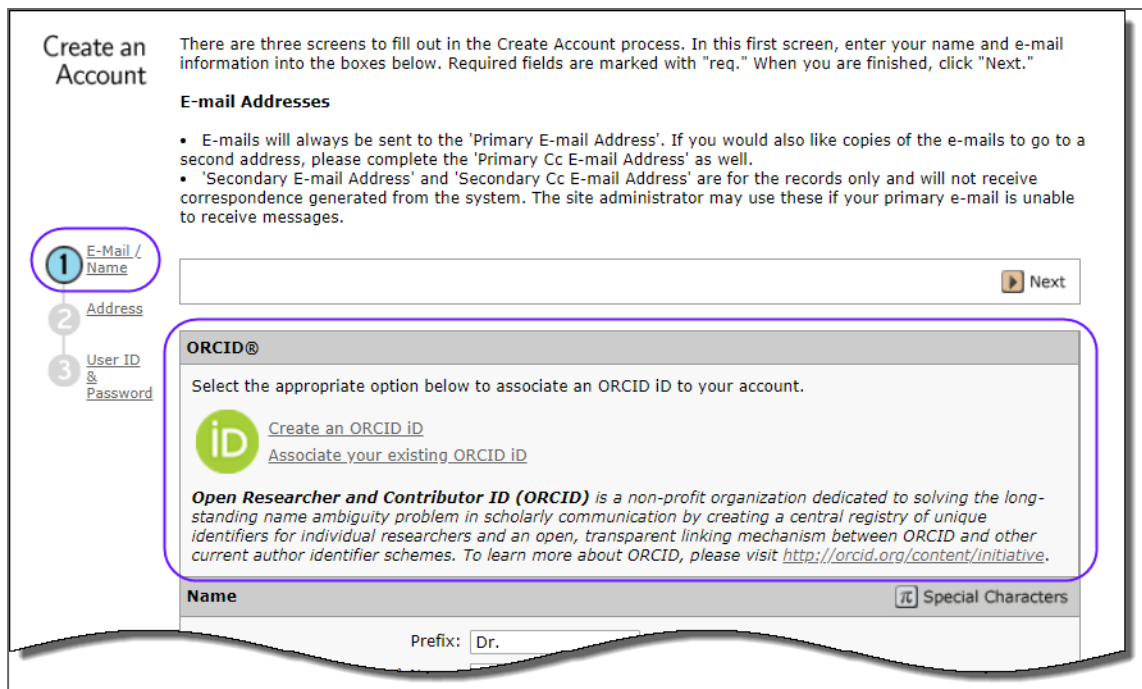
▶ **Create your Account**

1. E-Mail / Name Screen

   During account creation, new users will be given the option to associate an ORCID iD with their account by either registering for a new ORCID iD or associating and existing ORCID iD. Each of these options will be presented to the user as links in the first step of the account creation process. In prior versions, new users entered their ORCID as text in the third step of account creation and it was not validated by ORCID.

   When the user selects one of the options to associate an ORCID iD with their account, a new browser window will open a registration page on the ORCID website.

The user must sign in using their existing ORCID credentials or register for a new ORICID iD. Once the user has validated an ORCID iD using one of the options, they will be asked to either authorize or deny the journal's *ScholarOne Manuscripts* site access to their limited data.

Web of Science Group

ORCID
Connecting Research
and Researchers

CONNECTING
ScholarOne Manuscripts
WITH YOUR ORCID RECORD

ScholarOne Manuscripts

has asked for the following access to your ORCID Record

Confirm who you are, to log you in to their system

Add an external identifier to your ORCID Record

Read limited info from your biography

This application will not be able to see your ORCID password, or
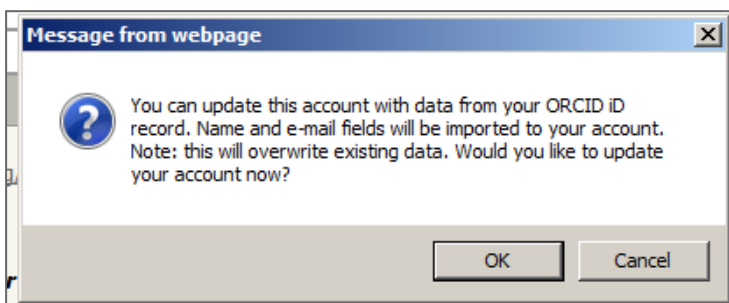other private info in your ORCID Record

Deny   Authorize

ScholarOne Manuscripts

ScholarOne, a Thomson Reuters company, provides online tools to
help many of the world's leading scholarly publishers manage their
submission and peer review processes. A journal on the ScholarOne
Manuscripts platform has requested authorization. Your ORCID iD
and profile data marked "limited" will only be shared with journals and
publishers you authorize.

Note: Journals will be required to use their own ORCID member credentials to utilize
this function. The journal name will be displayed in the screen above where you
see ScholarOne Manuscripts.

If the user clicks **Authorize**, they will be redirected back to their journal's *ScholarOne Manuscripts* site with a validated ORCID iD.

As part of the redirect process they will have an opportunity to update their account registration form with data from their ORCID profile.

Message from webpage

You can update this account with data from your ORCID iD
record. Name and e-mail fields will be imported to your account.
Note: this will overwrite existing data. Would you like to update
your account now?

OK   Cancel

Click **OK** to update the journal's *ScholarOne Manuscripts* site. Click **Cancel** to return to *ScholarOne Manuscripts* without updating the data.

Create an Account

There are three screens to fill out in the Create Account process. In this first screen, enter your name and e-mail information into the boxes below. Required fields are marked with "req." When you are finished, click "Next."

1. E-Mail / Name
2. Address
3. User ID & Password

▶ Next

ORCID®

Select the appropriate option below to associate an ORCID iD to your account.

To register for a new ORCID iD, click here.

To associate this account with your existing ORCID iD, click here.

Open Researcher and Contributor ID (ORCID) *is a non-profit organization dedicated to solving the long-standing name ambiguity problem in scholarly communication by creating a central registry of unique identifiers for individual researchers and an open, transparent linking mechanism between ORCID and other current author identifier schemes. To learn more about ORCID, please visit* http://orcid.org/content/initiative.

Name   π Special Characters

Prefix:	Dr. ▼
First (Given) Name:	req
Middle Name:	
Last (Family) Name:	req
Degree:	
Primary E-Mail Address:	req
Primary E-Mail Address (again):	req
Primary Cc E-Mail Address:	
Secondary E-Mail Address:	
Secondary E-Mail Address (again):	
Secondary Cc E-Mail Address:	

▶ Next

Note: *Required information is denoted by the required symbol (req) beside the field.*

- Enter your name and email information. As needed, click the Special Characters icon to insert characters in your first, middle, or last name.

- Click the **Next** button.
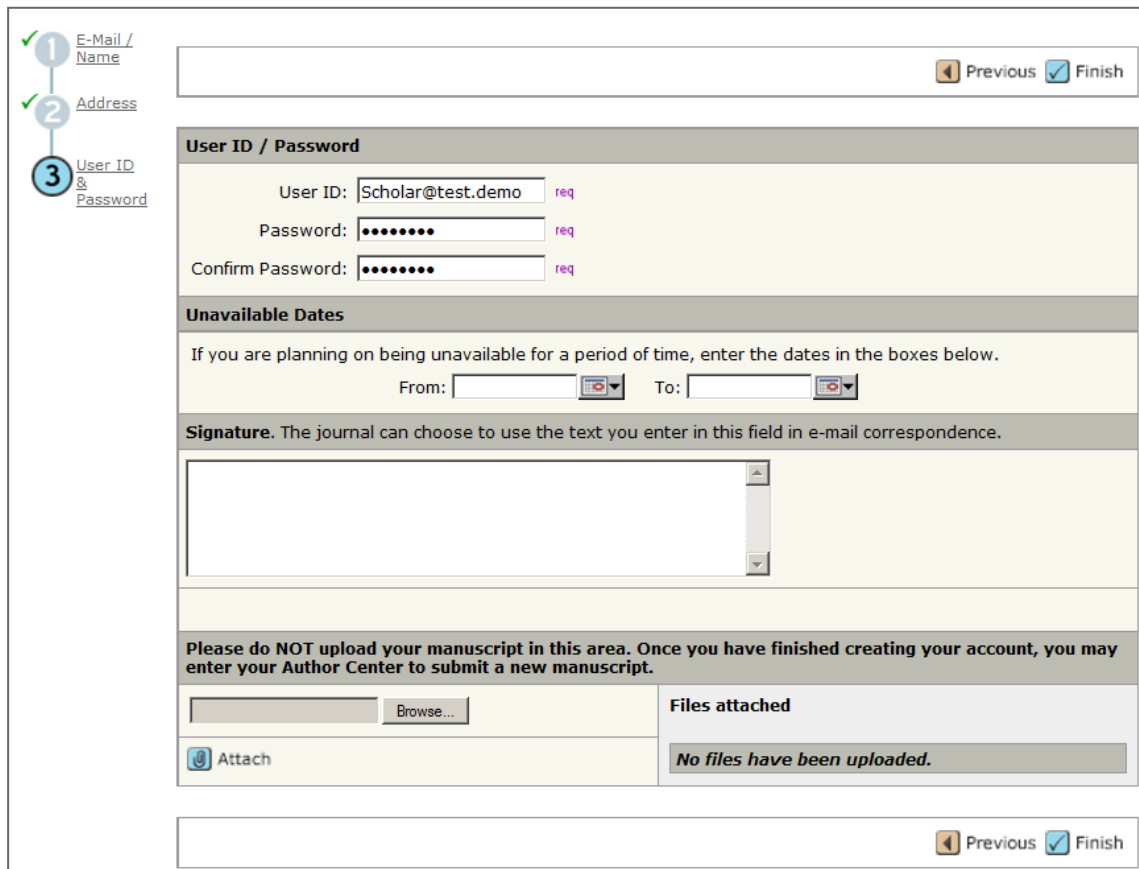
2. Address Screen

- Enter your address information.

Note: The Institution field utilizes the Ringgold Identify database to standardize institution names. Type a minimum of three characters and matches from the database are displayed. Select a match, or if no match is found, enter the institution name manually.
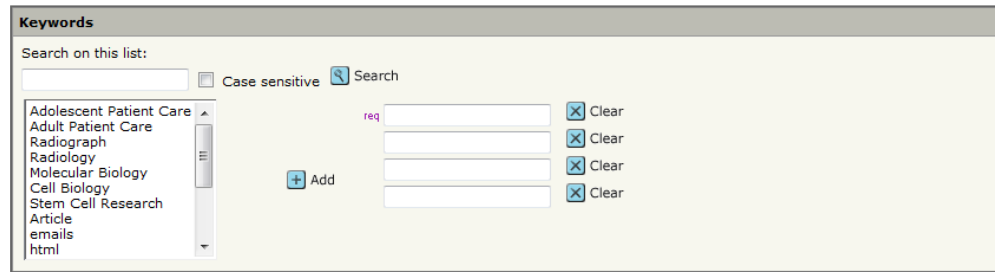
If you see warning symbol ⚠ next to the institution name, it means that the institution is not a Ringgold connected institution. Please be sure to check again to see if you can find the correct institution in the database.

- Optionally, you can enter secondary address information.

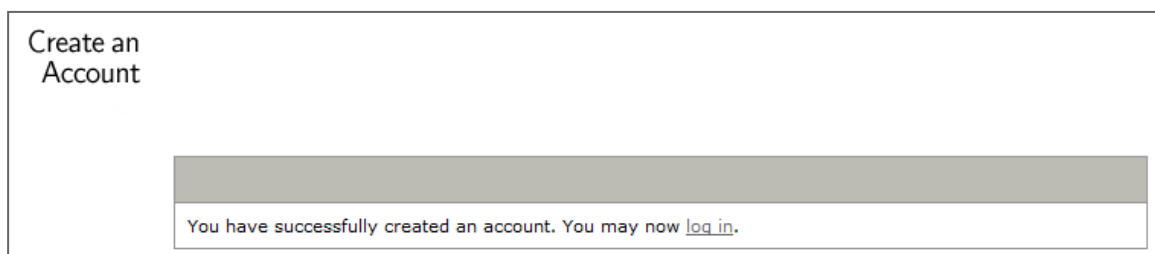- Click the **Next** button.

3. User ID & Password Screen

- The **User ID** field defaults to the email address you entered in Step 1. You can change your User ID here if you wish. For example, you can use make your User Id a single word for ease of login. We do not recommend entering a different email address than that used in Step 1 in the User ID field.

- Enter your password in the **Password** field then again in the **Confirm Password** field. For security reasons, you may not copy and paste.

- Complete additional fields as appropriate:

- **Keywords**: Many journals require keywords be associated with their users. This allows journals to keep track of specialty areas for each user. Add keywords to your account by selecting a word from the left column and clicking the **Add** button. The keyword is added to the column on the right. If your journal does not have pre-defined keywords, you may be able to type in keywords.

- o **Unavailable Dates:** Enter calendar dates that you are unavailable as needed. The journal may also display a field to enter reason for unavailability.

- o **Signature:** If you enter a personalized signature here the journal may choose to use the text in email correspondence.

- o **File Attachments:** *ScholarOne Manuscripts* gives you the option of attaching files to your user account. The journal may have specific requests, or you may include documents you deem relevant such as a Curriculum Vitae. This feature may not be configured on your site.

  Note: This is **NOT** the area you use to attach a manuscript.

- • After completing all applicable fields, click the **Finish** button.

4. When your account setup is complete, you will see the following message.

5. When you log in you will have only the Author and Reviewer roles (or the default roles for your journal). Contact ScholarOne Implementation to have your administrative rights activated.
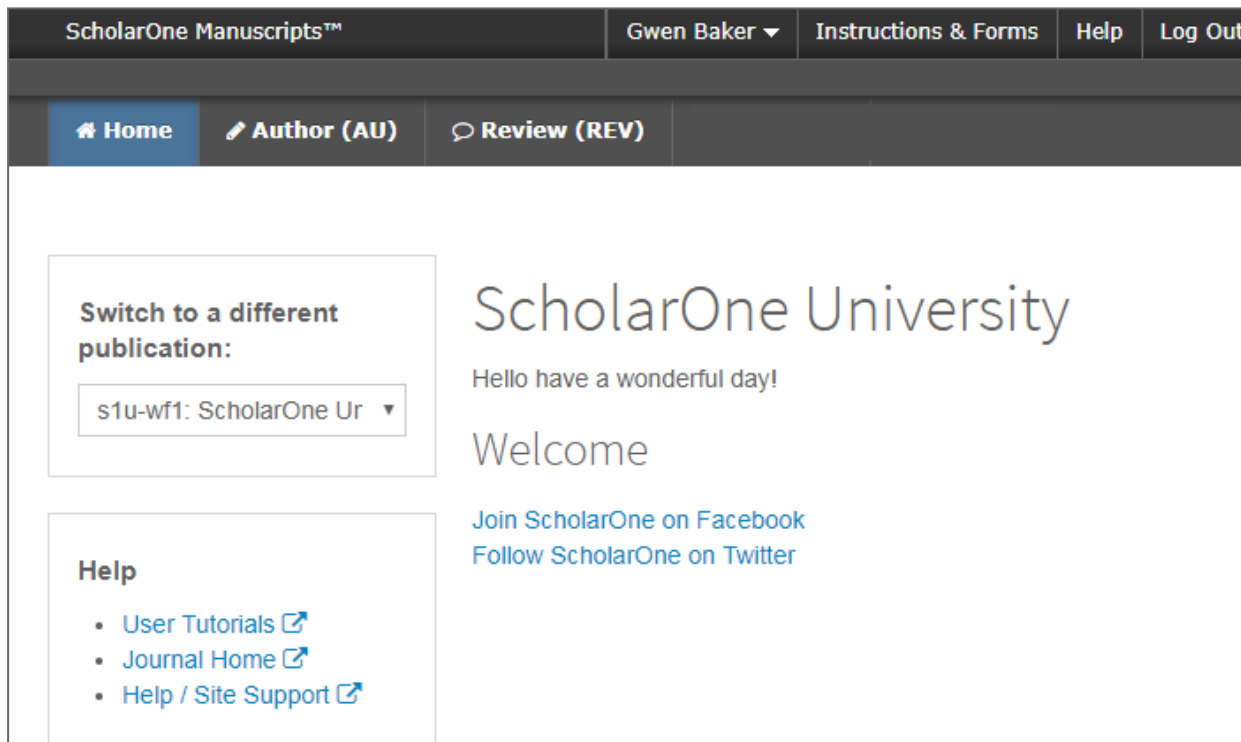
CHANGING YOUR USER ACCOUNT INFORMATION

Your email address, phone number, or address may change over time. To edit your own account information, click on your name in the upper right corner of the journal pages. Then select the area of information you need to edit.
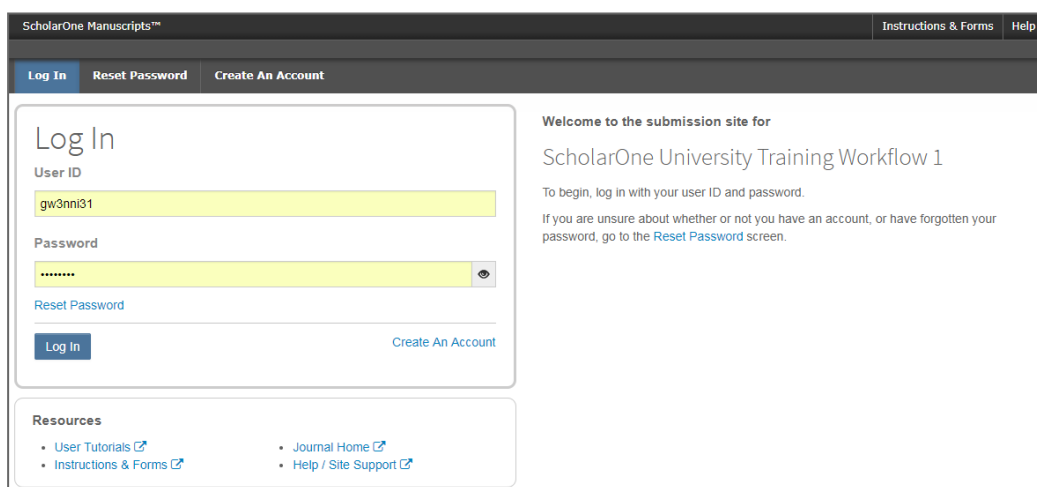
Edit My Account pages contain the information you entered when creating your account, in editable form. Edit information as needed including changing your user ID and password.
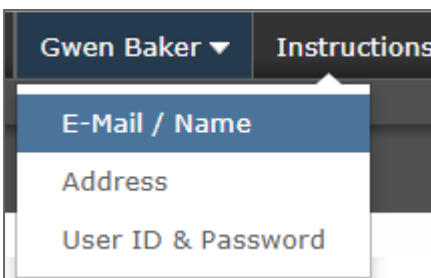
LOGGING IN/OUT

▶ Log In

1. Each journal's site has a unique Web address that is sent to you by email. To access the site, click the link within the email or enter the web address (URL) in the address field of your browser. The journal's Log In page opens.

2. Enter your **User ID** and **Password.**

3. Click the **Log In** button.

▶ ORCID Log In

The journal site may be configured to use ORCID Login. Select the **Log In with ORCID iD** button at the bottom of the Log In box.

You will then log in to ORCID ID or register an ORCID account.
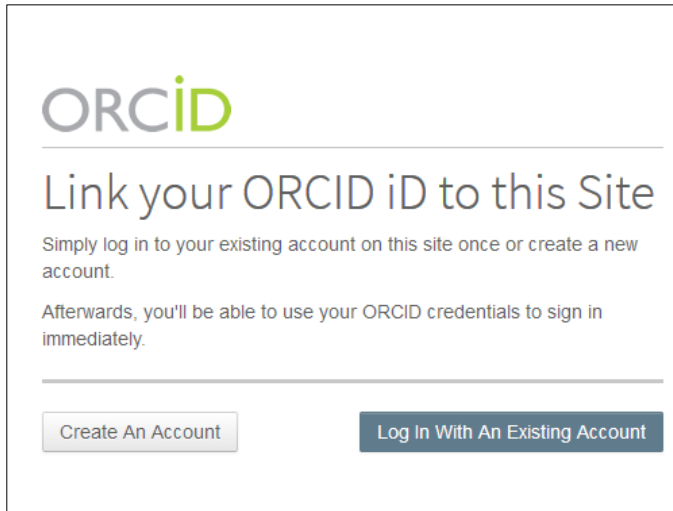
If the you have used this login process before or have already linked your ORCID iD to your ScholarOne profile, you will automatically be logged in to the ScholarOne site.

If this is their first time linking your ORCID and ScholarOne accounts together, you will be asked to authorize the publisher or journal to get their ORCID iD and to read limited-access information such as their name and address. Reading limited-access information will make it easier for new users who do not have a ScholarOne account to pre-fill their profile information when creating an account.

Next, you will link your ORCID account to the ScholarOne site. You will see the option of creating a new account or logging in with your existing site credentials.


If you already have an account on the ScholarOne site, you will only need to provide your ScholarOne login credentials once. Afterwards, you can use either the ScholarOne or ORCID credentials to log into the participating site.

▶ **Log Out**

4. You can log out at any time by clicking **Log Out** at the top right corner of the page you are on.

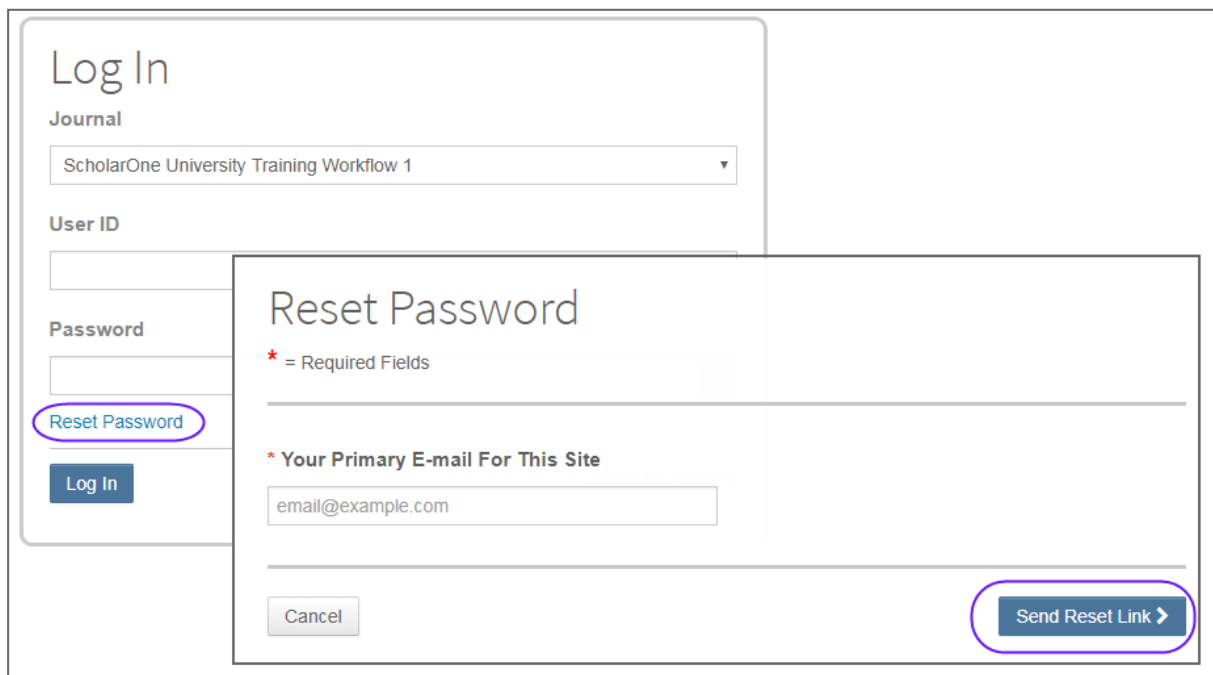| Gwen Baker ▼ | Instructions & Forms | Help | Log Out |
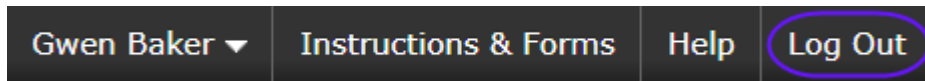
5. You will be returned to the Log In page.

Note: After 3 hours of inactivity you will be automatically logged out and returned to the Log In page.

FORGOT YOUR PASSWORD?
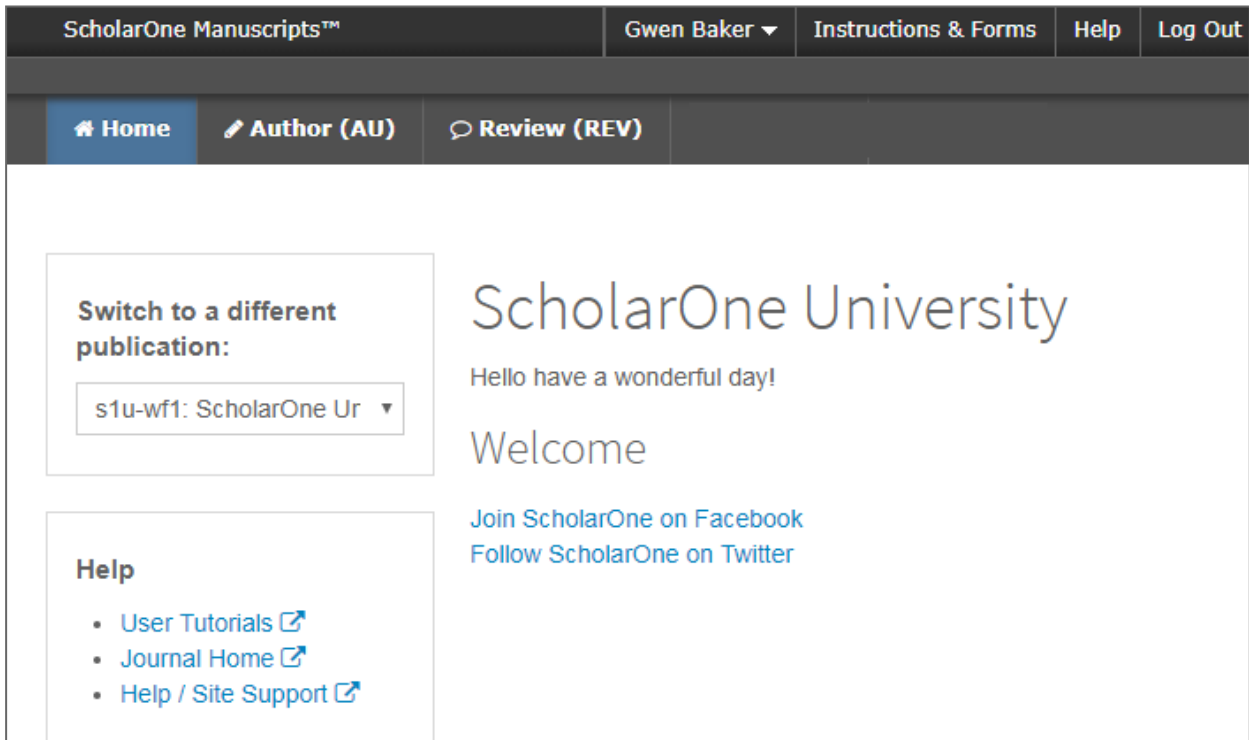
Select the **Reset** Password link.

Log In

Journal

ScholarOne University Training Workflow 1 ▾

User ID

Password

Reset Password

Log In

Reset Password

* = Required Fields

* Your Primary E-mail For This Site

email@example.com

Cancel   Send Reset Link ❯

Enter your email address and click Send Reset Link. You will be sent a link to reset your password.

NAVIGATION OVERVIEW

HOME PAGE

The Home Page contains top-level navigation based upon roles. You will only see the roles you for which you have permissions. It also contains side navigation to your different publications (if applicable).

The Home page contains many convenient navigation features as well as site-specific information and images.

Header

**Quick Links:** Access the following functions:

- Your user name – click to edit your account
- Instructions & Forms– journal-specific instructions for users and any journal-specific forms required for the peer review process; Admins see the screens for editing the page
- Help – links you to various help functions
- Log Out

Journal Logo

Top-Level Menu: Access the role-specific centers and functions through this menu. Users see only centers they have access to. Some centers, such as Admin and Editor, are grouped together under a heading with a drop-down list. This menu is displayed wherever you are working in the system to allow you to easily move between functions.

Left menu: Access options to switch to another journal (if configured) and links to help and documentation.

The Breadcrumb Trail: The menu path you have followed to arrive at the current page. You can click a link to navigate back to a previous page.
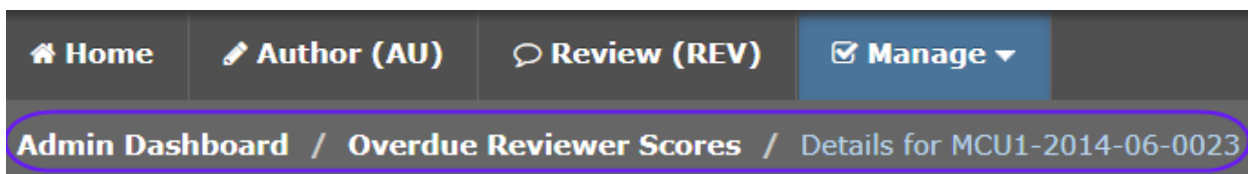

Simple Search: This feature displays in the header for the Admin, Associate Editor, EIC, and Production Editor Dashboards. You may perform a wildcard search by placing an asterisk (*) at the beginning and/or end of your search text.
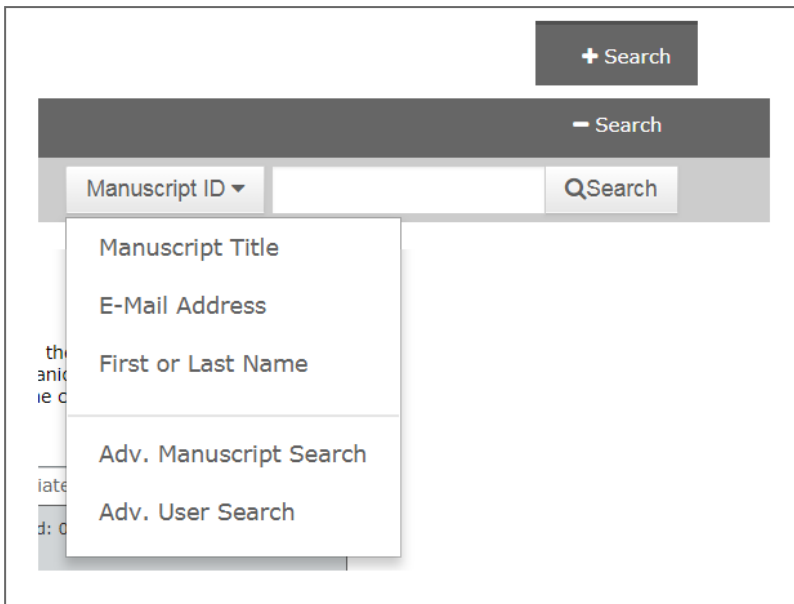
Note: Users with Admin privileges can also use this function to search for a person's account by email address and first and last name.

FOOTER FEATURES
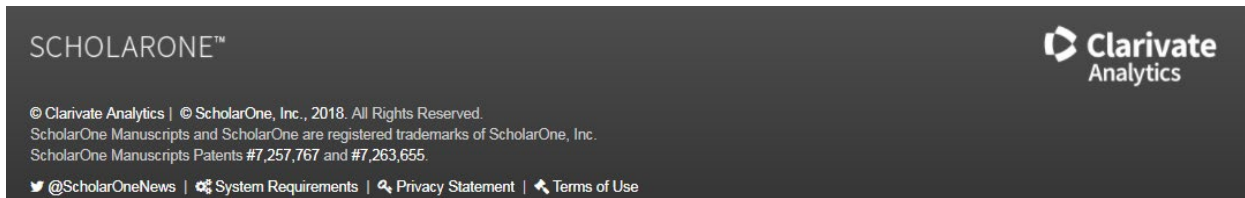
In addition to Copyright and Trademark Information, the footer contains:

- Link to ScholarOneNews

- Link to System Requirements

- Link to Privacy Statement
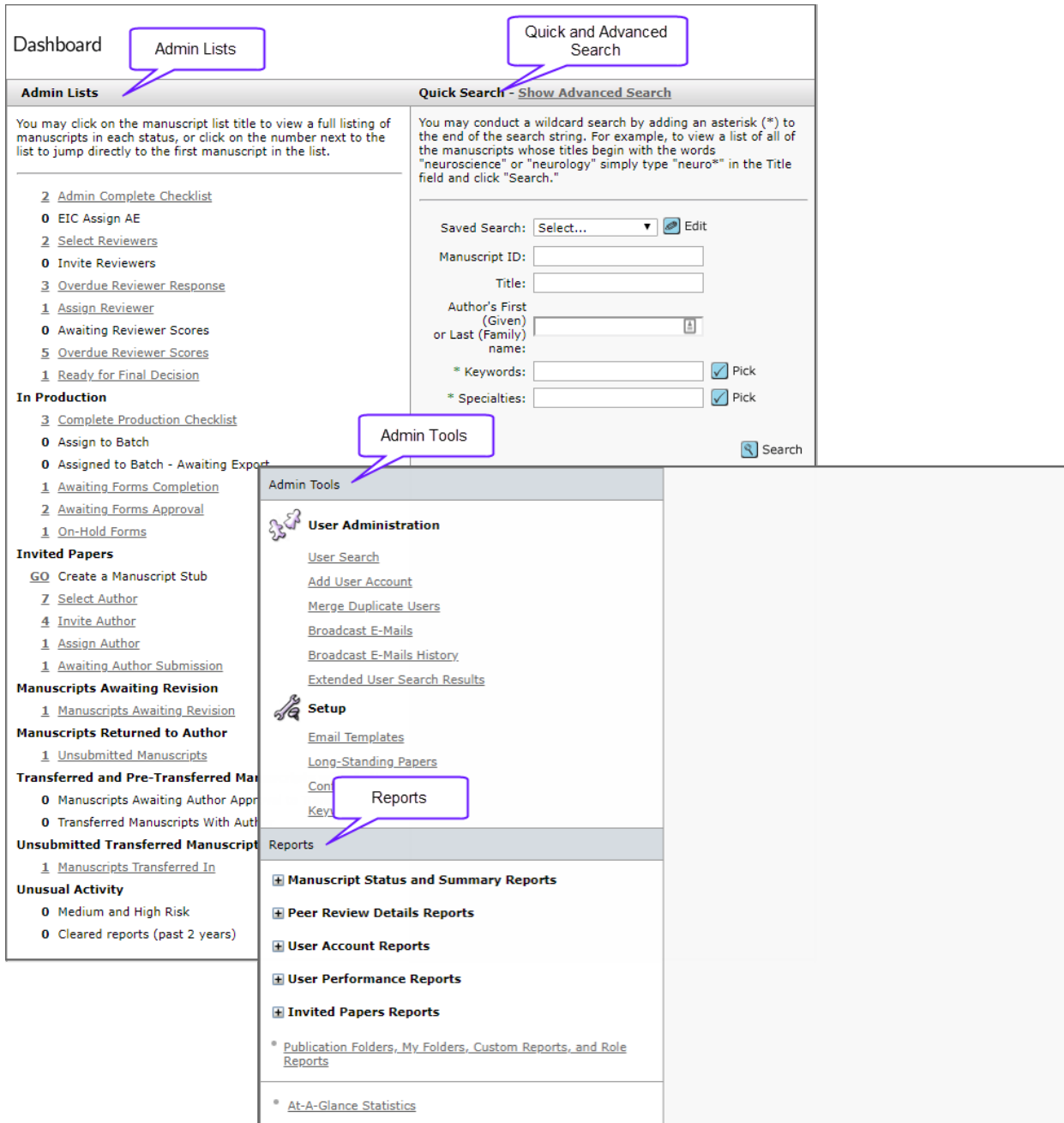
- Link to Terms of Use

LANGUAGE TOGGLE

Language toggle allows you to switch the display from the default language of English to another language. If configured for your site, you will find the language toggle located on the header at the top of the screen.
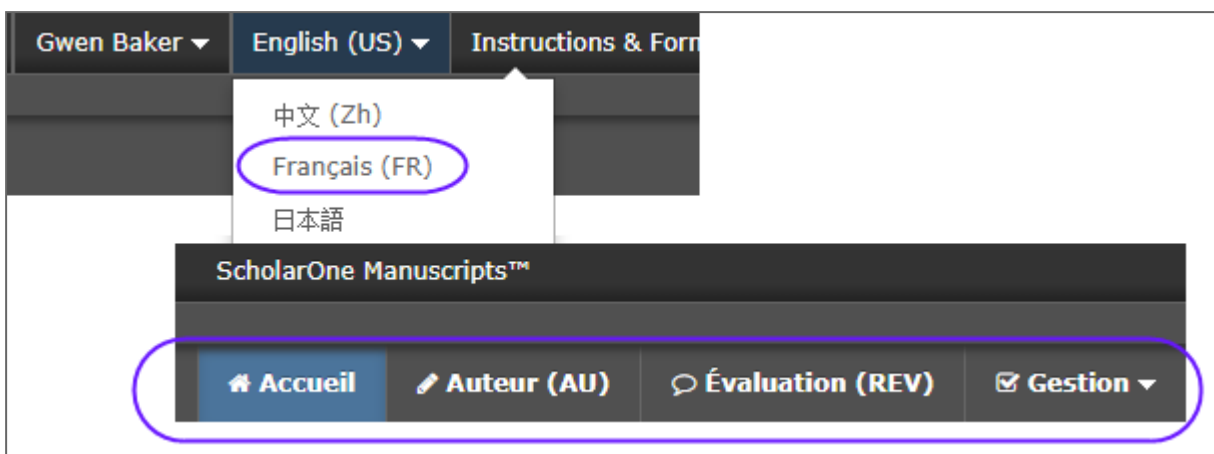
Note: All uploaded documents and end-user supplied text will not toggle and will be displayed in the language entered by the user.

ADMIN CENTER OVERVIEW

The Admin role is considered the "Super User" of the system. The Admin Dashboard allows you to manage submitted manuscripts and monitor them through the full review process. This is also where you perform administrative tasks such as setting up user accounts, creating reports, and editing email templates.

- **Admin Lists**: Admin Lists displays the number of manuscripts in any given status. The Admin Lists section of your dashboard is key to navigating to manuscripts in the peer review process. Clicking the number opens the first manuscript in that status. Clicking the status name link opens a list of manuscripts in the status.

- **Admin Tools**: This section and its functionality appear only on the Admin dashboard. Manage the journal's configuration and functionality through this section.

- **Reports**: The Admin has a robust reporting section available to them for creating standard and custom reports.

- **Quick and Advanced Manuscript Searches**: Except for Author and Reviewer roles, each center's dashboard contains a manuscript search section. You can search using the quick or advanced search functions to find single or multiple manuscripts. See below for examples of how to use these search functions.

ACCESS MANUSCRIPTS VIA THE ADMIN LISTS

To view manuscript information, you may also select any active hyperlink in the Admin Lists section of your dashboard.

▶ Access Manuscripts via the Admin Lists

6. From the Admin dashboard, select any active link in the Admin Lists.

Admin Lists

You may click on the manuscript list title to view a full listing of manuscripts in each status, or click on the number next to the list to jump directly to the first manuscript in the list.

2	Admin Complete Checklist
0	EIC Assign AE
3	Select Reviewers
0	Invite Reviewers
2	Overdue Reviewer Response
1	Assign Reviewer
2	Awaiting Reviewer Scores
4	Overdue Reviewer Scores
1	Ready for Final Decision

7. The View Manuscripts page displays a table containing any manuscripts in the selected status category. For example, if you selected the link for **Admin Complete Checklist** task, the table will display the Admin Complete Checklist header and all manuscripts listed are in a status where the next step is to complete the Admin Checklist.

Web of Science Group

Awaiting Admin Checklist				Manuscripts 1-2 of 2
Manuscript ID ↑ / Manuscript Type	Manuscript Title / Submitting Author	Date Submitted ↓	Status	Take Action
WRK1-2018-03-0001	Surgical Compared with Nonoperative Treatment for Lumbar Degenerative SpondylolisthesisFour-Year Results in the Spine Patient Outcomes Research Trial (SPORT) Randomized and Observational Cohorts [View Submission]	13-Mar-2018	AE: Not Assigned EIC: Not Assigned ADM: Not Assigned ● Complete Checklist (Due 12-Apr-2018)	Select... ▼
Original Article	Norell, Michelle (proxy)			

8. Each manuscript listing displays the following:

- **Manuscript ID**: A system-generated ID unique to the manuscript
- **Manuscript Type**: Category of manuscript
- **Manuscript Title**: The title of the manuscript and a link to view the submission
- **Submitting Author**: Name of the submitting author, a button to view author details, and a hyperlink to send the author an email
- **Date Submitted**: Date of submission (or revision if viewing a revision)
- **Status**: Status of the submission in the peer review process and the editorial staff assignments
- **Take Action**: drop-down list or button indicating the next action to be taken on the submission

9. You can sort the list by clicking on a (linked) column header.

10. Select an action from the **Take Action** drop-down list to access the Manuscript Details.

Awaiting Admin Checklist				Manuscripts 1-2 of 2
Manuscript ID ↑ Manuscript Type	Manuscript Title Submitting Author	Date Submitted ↓	Status	Take Action
WRK1-2018-03-0001 Original Article	Surgical Compared with Nonoperative Treatment for Lumbar Degenerative SpondylolisthesisFour-Year Results in the Spine Patient Outcomes Research Trial (SPORT) Randomized and Observational Cohorts [View Submission] Norell, Michelle (proxy)	13-Mar-2018	AE: Not Assigned EIC: Not Assigned ADM: Not Assigned • Complete Checklist (Due 12-Apr-2018)	Select... ▼ Select... View Details View Manuscript Files View Audit Trail Admin Checklist

Note: For speed, the Admin and Production Editor views allow selection of an action (including **View Details**) from the dropdown list.

SEARCHING FOR MANUSCRIPTS

Except for Author and Reviewer roles, each center's dashboard contains multiple ways to search manuscript information. You can search using the simple, quick or advanced search functions.

Searches are dependent on your role:

- Administrators can search on all search fields listed in any of the search methods, including both user and manuscript information.

- Editors can search on manuscript data but may not search on user data.

Search Tips

- The asterisk (*) allows for wild card searches in many places in ScholarOne Manuscripts. These are helpful for locating manuscripts, authors, and reviewers.

   E.g., if you enter **John*** in a Last Name field, you will find people with the name **John**, **Johnson,** and **Johnston.**

- Use at least four (4) characters or numbers in the search string and the results will be returned more quickly.

- Press the **Enter** key to start your search. This saves time by avoiding scrolling down the screen to find the Search button.

▶ Use the Simple Search

11. The Simple Search is located on the right side of the screen.
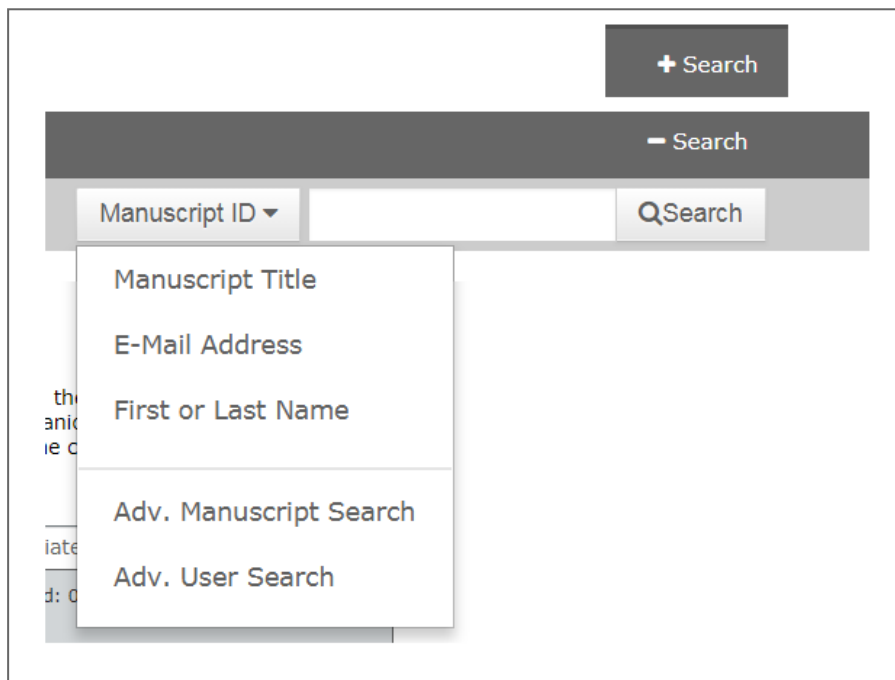
12. Enter the search criteria in the search field. If needed, use the asterisk (*) as a wild card.

13. Select the type of search from the drop-down list.

14. Click the **Search** button.

15. The Search Results screen displays any manuscripts meeting the search criteria.

16. Select an action from the **Take Action** drop-down list to access the Manuscript Details.

▶ **Use the Quick Search**

17. The Quick Search appears on the role dashboard. It allows you to find a manuscript by number, title, author, or keyword.

18. Enter search criteria in any of the fields. If needed, use the asterisk (*) as a wild card.

19. (Note that there is a Saved Search option. You will see in the Used the Advanced Search section how to save a search.)

20. Click the **Search** button.

21. The search results appear showing all manuscripts that met your search criteria.

22. Select an action from the **Take Action** drop-down list to access the Manuscript Details.

Search Results				

5 Blinded				Manuscripts 1-6 of 6
Search Criteria: All				
Manuscript ID ↑ / Manuscript Type	Manuscript Title / Authors	Date Submitted ⬇	Status	Take Action
MCU1-2013-05-0004 / Original Article	Dogwood Flowering Patterns in Virginia [View Submission] / 🔍 Author, Alan (contact)	06-May-2013	AE: Editor, Eddie (proxy) EIC: Not Assigned ADM: Cooney, Jane • Make a Decision (Due 13-Jun-2013)	Select... ▼
MCU1-2013-04-	The amazing world of Education [View Submission]		AE: Editor, Eddie (proxy) EIC: Not Assigned	

▶ Use the Advanced Search

23. The Advanced Search can be accessed by clicking the **Advanced Search** link in the Quick Search pane of your dashboard. The advanced search allows you to find groups of manuscripts by workflow or status or assigned person and other criteria.

Web of
Science
Group

Advanced Search

Search Fields Related to the Manuscript

Manuscript ID:

Previous Manuscript ID:

DOI:

Tracking Number:

Title:

Running Head:

Country of Submitting Author:
Any
Afghanistan
Aland Islands
Albania

Workflow / Status:
Any
Unsubmitted / Not Yet Submitted
In Revised Workflow / Partially Submitted Revisions
In Original Workflow

Decision:
Any
Accept (ORIG - Final Decision)
Accept (RES - Final Decision)
Accept (REV - AE Decision)

Keywords:

☑ Pick AND ▾

☑ Pick AND ▾

☑ Pick AND ▾

☑ Pick AND ▾

☑ Pick

Manuscript Type: Select... ▾

Search Fields Related to People Who Have Performed Actions on the Manuscript

Author First (Given) Name:

Reviewer First (Given) Name:

24. You are presented with a variety of search fields, filter options, and date options. You can select any combination of criteria for your search. For example, you can find all manuscripts accepted last month.

25. If you want to save your search criteria for future use, select the **Save this Search, called:** checkbox and name your search before clicking the Search button. (The saved search can be accessed from the Quick Search.)

☐ Save this search, called: 🔍 Search

26. Click the **Search** button.

27. The search results display allowing you access to the manuscript.

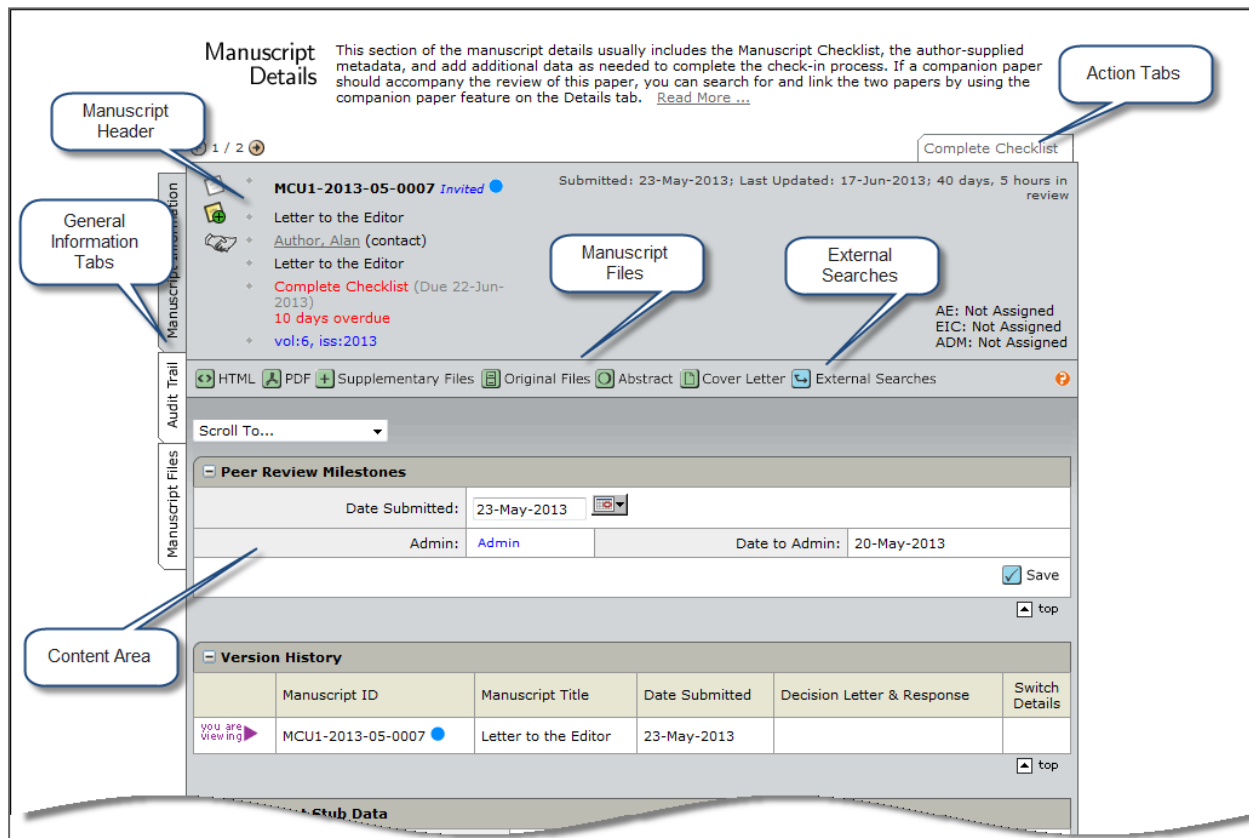28. Select an action from the **Take Action** drop-down list to access the Manuscript Details.

MANUSCRIPT DETAILS OVERVIEW

Your role's view of manuscript details contains any information and action tabs you will need in order to move a manuscript to the next stage in the peer review process.

Access this page by clicking in the **Take Action** button of the View Manuscripts page, or, in Admin or Production Editor view, select **View Details** from the drop-down list.

- **Manuscript Header:** The Manuscript Header displays a summary of information about the manuscript including the unique manuscript ID number, title, author, and other basic information about the manuscript. This header remains at the top of page throughout the workflow.

- **Manuscript Files:** Click on any of the links to access the manuscript files. There are PDF and HTML versions of the manuscript files, and other supporting files for the manuscript (if applicable to the specific manuscript.) Because these files are in the header, they will display on all Manuscripts screens.

- **External Searches:** *ScholarOne Manuscripts* makes it easy for editors and reviewers to find a variety of information online. Clicking the External Searches button displays the following popup box:
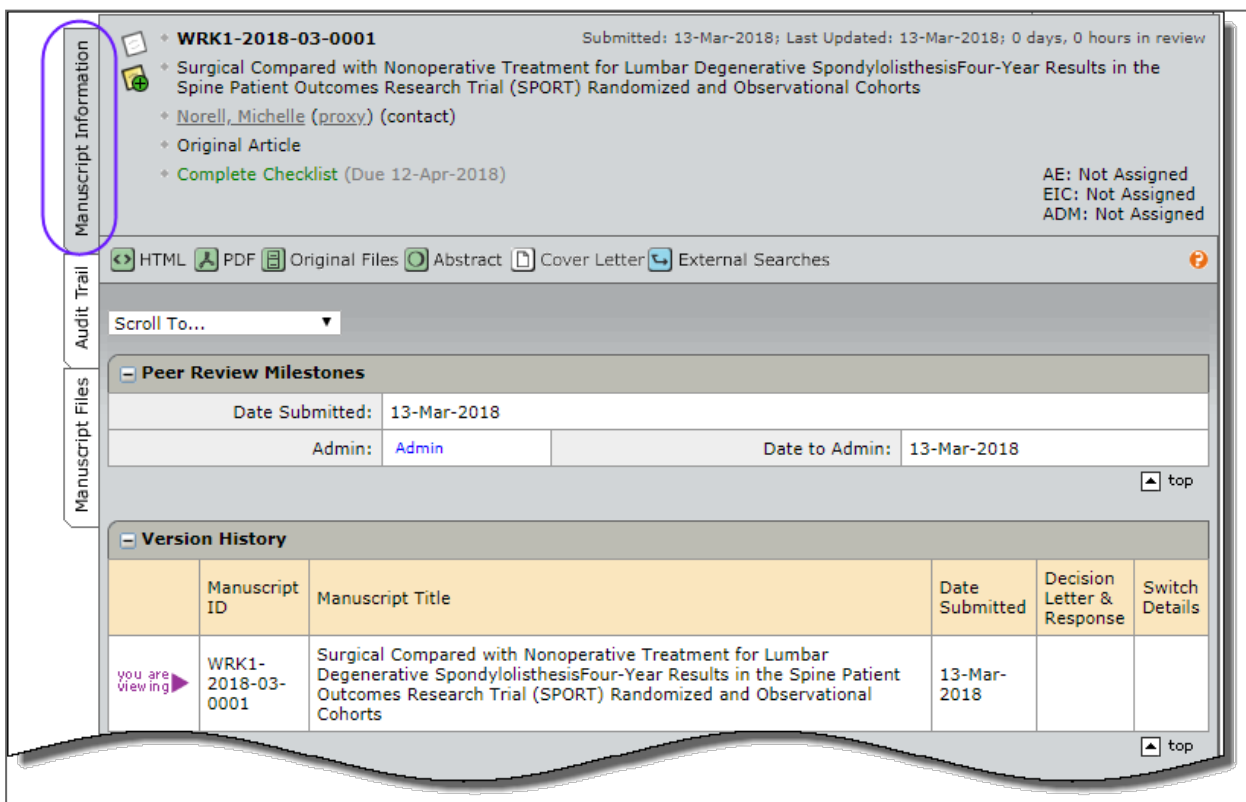
Select checkboxes in the Search On section. You can enter your own criteria in the **Other** field. Then choose from the Search Across search engine links.

- **Action Tabs:** A tab displays at the top right of the screen for the next action to be taken. The action displayed is dependent upon the status of the manuscript in the workflow and the user's role in the workflow.

- **General Information Tabs:** Each of these three tabs contains detailed information and functions for the Admin. They are summarized here, and specific instructions can be found in later sections of this document.

    o **Manuscript Information:** This tab is displayed by default when you access Manuscript Details. It contains information such as the manuscript summary, peer review milestones, version history, author-supplied data, and companion paper information.

    o **Audit Trail:** A description of time and date-stamped events and changes. The most recent action is displayed first in the list. If more than 10 events associated with the manuscript have taken place, access them from the Events dropdown. To view only the e-mail correspondence, click the letters only link. Clicking the envelope icon allows you to view and forward the e-mail.

- o **Manuscript Files:** Within this tab, you (typically the Administrator) have the ability to manage manuscript files, perform exports, and unsubmit or withdraw the manuscript.

- **Content Area:** The main body of the screen displays the content of the General Information tab (Manuscript Information, Audit Trail, or Manuscript Files) selected on the left of the screen. In the example above, the contents of the Manuscript Information tab are displayed.

THE MANUSCRIPT INFORMATION TAB

The Manuscript Information tab displays by default when you access the Manuscript Details page. It can be accessed through the tab at the left side of the Manuscript Details page as well.
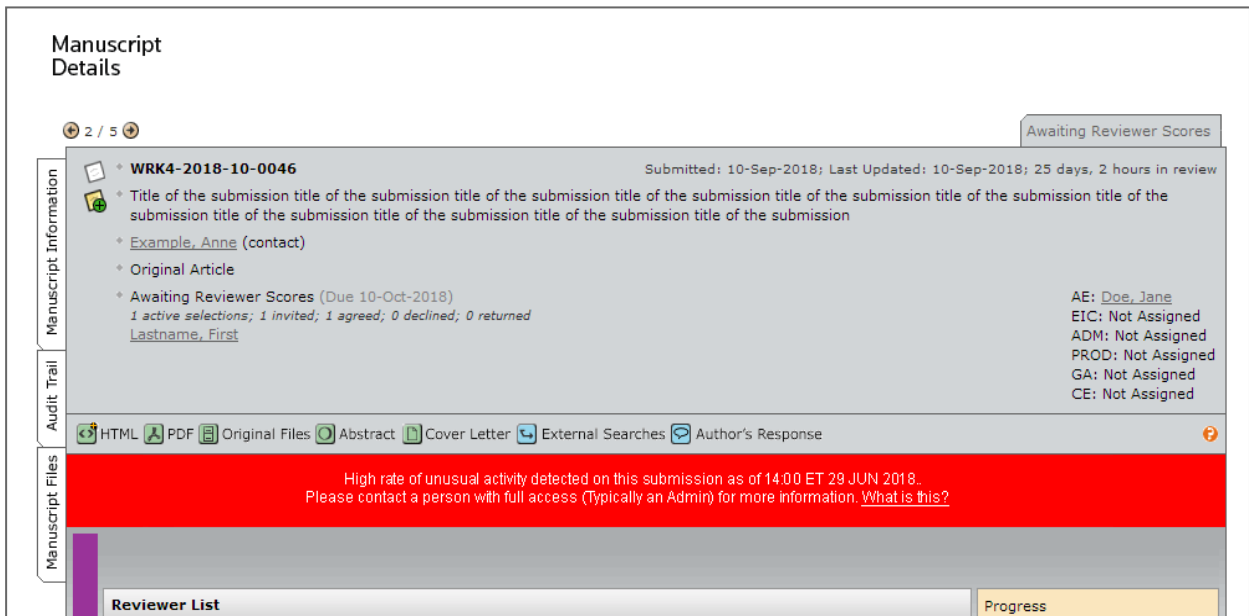
Your journal's Manuscript Information tab contains some/all of the following sections:

- Manuscript header

- Peer review milestones

- Version history

- Author-supplied data

- Companion paper information

- Information related to all previous actions performed on the manuscript (if configured)

- Flag Manuscripts

- Notes (Notes display at the bottom of all General Information tabs)

Manuscript Header

Manuscript Details contain a summary section at the top. This header remains at the top of pages throughout the peer review process.

The header may list the following:

- Manuscript ID – may include a revision number,"Invited", or "Resubmission"

- Notes link – if applicable, appears to the left of the manuscript ID.

- Title

- Companion Paper link – if applicable, appears to the left of the manuscript ID.

- Author (and any co-authors) – author's name is hyperlinked for email correspondence

- Status – appears green if OK, red for overdue

- Dates – submitted, last updated, total time in review

- Names and roles of people assigned to the manuscript. Names are hyperlinked for email correspondence. If you have administrative permissions, you also see proxy links.

- Author Due – Date for Revised Paper

- Proofs and files – links to the HTML and PDF proofs of the submission as well as other associate files and the Author's response (on revisions and resubmissions only)

- Unusual Activity Indicators (if configured) – A red or yellow status indicator will appear when unusual activity has been detected. For more information please go to the Unusual Activity Indicators of this guide.

Scroll To…

To jump directly to a section of the Manuscript Details page, select from the **Scroll To…** dropdown list.
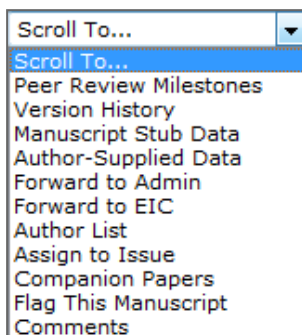
Viewing Proofs

View proofs by clicking the links in the header. See the *Viewing Manuscript Proofs and Files* section of this document for more details.

Peer Review Milestones

This section provides a quick look at a manuscript's current progress through the peer review process, by role and date. You may also email a person by clicking the named link. Those viewing this section using admin permissions can perform actions as another person by clicking the proxy link.

Version History

You have access to all versions of a manuscript. Revisions are indicated by a revision number appended to the Manuscript ID. (E.g., R1 or R2.)

- Click the links in the **Decision Letter & Response** column to view decision-related correspondence regarding a previous version.

- Click on the **Switch Details** button to view the Manuscript Details page for a previous version.

## Additional Version Information

To help you keep track of which version you are currently viewing, a colored bar displays along the left of the page indicating a revision.

- Original submission: no colored bar

- Revision: purple bar

- Resubmitted Manuscript: blue bar

- Invited Manuscript: yellow bar
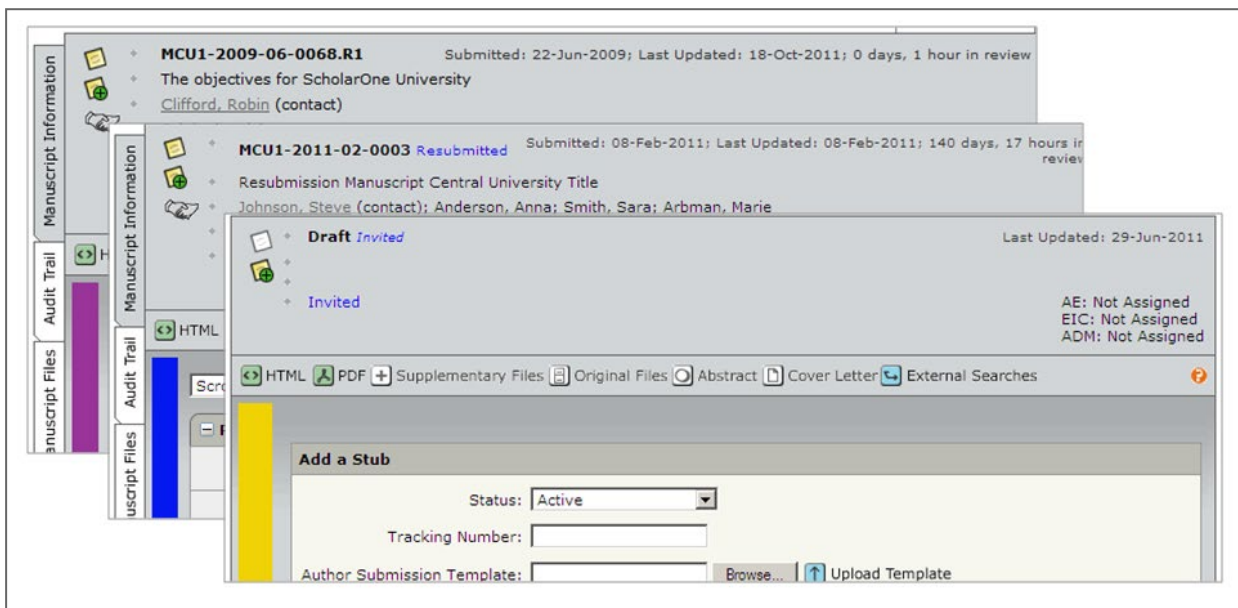
Revised and resubmitted files will also include a link to the Author's response on the header.
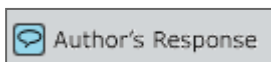
Author-Supplied Data

This section lists all the information entered by the author during the manuscript submission process (excluding uploaded files). The Admin may review to ensure the author-supplied data is correct and edit if necessary.

Note: The checkmark after the ORCID iD indicates that the iD has been validated through ORCID. The checkmark after the institution name indicates it has been selected from the Ringgold Identify database and has been validated by Ringgold.

Components of the Author-Supplied Data section may include the following:

- Manuscript type

- Title

- Manuscript ID

- Funding Institution – Name of funding institution and grant number using the FundRef taxonomy

- Submitting author: Name of the submitting author, a button to view author details, and a hyperlink to send the author an email

- Authors and institutions: Name(s) of the submitting and additional authors, a button to view author details, and a hyperlink to send the author an email, and a link to their ORCID iD if configured

    o Author contribution using CASRAI's CRediT taxonomy

- Contact author: The Contact Author defaults to Submitting Author or the Corresponding Author (if your site is configured to have Corresponding Author). Depending on role permissions, this field can be edited

- Running head

- Any keyword attributes entered by the author

- The Author's preferred and non-preferred reviewers and editors

- Cover letter text

- Custom questions: Click **Show** to view any custom questions asked by the journal during the manuscript submission process

Those viewing this section using Admin permissions can perform additional functions:

- Change the Submitting Author. If there are multiple authors on the manuscript, you may select a different author from the **Submitting Author** drop down list. Changing the submitting author will change the author who has the access to make the revision, if needed, on a paper.

- Change the Contact Author. If there are multiple authors on the manuscript, you may select a different author from the **Contact Author** list. Updating the contact author changes what author receives the correspondence from the journal.

▶ **Editing Author-Supplied Data**

29. Locate the Author-Supplied Data section.

> **Tip**: By default, the Author who submits the paper is listed as both the contact and submitting author unless they contact the Admin to make a change.

30. Click the **Edit This Information** button.

Author-Supplied Data

Manuscript Type:	Original Article
Title:	Surgical Compared with Nonoperative Treatment for Lumbar Degenerative SpondylolisthesisFour-Year Results in the Spine Patient Outcomes Research Trial (SPORT) Randomized and Observational Cohorts
Manuscript ID:	WRK1-2018-03-0001
Submitting Author:	Norell, Michelle ▾ ☑ Save Norell, Michelle (proxy) • *primary affiliation* 78 Baker Street Belmont 02478 United States
Authors & Institutions:	Norell, Michelle proxy • 78 Baker Street , Belmont 02478 United States Griffin, Carla proxy • Grand Junction VA Medical Center ✓ Grand Junction, Colorado United States
Contact Author (populates the ##PROLE_AUTHOR_..## e-mail tags):	Norell, Michelle ▾ ☑ Save Current Contact Author: Norell, Michelle (proxy)
Running Head:	Spine Patient Outcomes
Keywords:	
Author's Cover Letter:	
Custom Questions:	Show
	Edit This Information ☑ Save

31. The submission opens to the Review & Submit page of the submission. A message appears indicating that you are editing Author-Supplied data.

32. Edit the author's data. Any of the data may be updated by the Admin by clicking the **Edit** link located next to each section.

* Verify Step Information

✔ Step 1: Type, Title, & Abstract   [✎ Edit]

FIELD	RESPONSE
Manuscript Type	Original Article
Title	Surgical Compared with Nonoperative Treatment for Lumbar Degenerative SpondylolisthesisFour-Year Results in the Spine Patient Outcomes Research Trial (SPORT) Randomized and Observational Cohorts
Running Head	Spine Patient Outcomes
Abstract	Background: The management of degenerative spondylolisthesis associated with spinal stenosis remains controversial. Surgery is widely used and has recently been shown to be more effective than nonoperative treatment when the results were followed ove More...

33. Click **Save and Return** when finished editing Author-Supplied Data. You will return to the submission in the Admin center.

[« Save & Return]
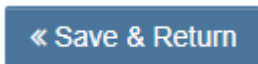
Assign to Issue

If you are using the Issue Management tool in the Production Center, you can pre-assign a manuscript to an issue. (For more information on the Issue Management tool, see the *ScholarOne Manuscripts* Production Center Guide.)

⊟ **Assign to Issue**	
Assign To:	Volume 6 , Issue 2013
Assign to:	Volume 8 - Issue 2013 Volume 7 - Issue 2013 Volume 6 - Issue 2013
	☑ Assign
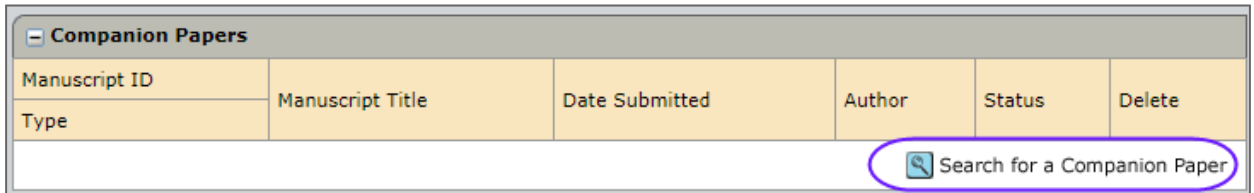
To assign to an issue, simply select the issue from the list then click the **Assign** button. To unassign from an issue, you do the same thing; select the issue in the list and click the **Assign** button. It will be unassigned.

Companion Papers

You can link the current manuscript with another manuscript for many reasons. An Admin may want to keep track of which papers are going to be in the same special issue. An Editor may want to compare an older paper with similar subject matter to a paper they have currently been assigned.

▶ **Assigning Companion Papers**

34. Click the **Search for a Companion Paper** button.

35. The Manuscript Search screen displays. Enter search criteria then click the **Search** button.

36. When you locate the desired manuscript, click **Use This Paper (+)** button.

Manuscript ID	Manuscript Title	Date Submitted	Status	Editor	Use This Paper
Manuscript Type	Submitting Author				
WRK1-2012-06-0012 🔵🟢	test paper [View Submission]	21-Jun-2012	AE: Ning, Ning EIC: Ning, Ning ADM: Garrison, Faith • Awaiting Reviewer Scores (Due 26-May-2016) *1 active selections; 1 invited; 1 agreed; 0 declined; 0 returned* Reviewer, Mere 656 days overdue	Not Assigned / Ning, Ning	⊞
Original Article	Smith, Matt				
WRK1-2014-10-0007 🔵	This is a manuscript [View Submission]	07-Oct-2014	AE: Potter, Ian EIC: Potter, Ian ADM: Potter, Ian • Accept (07-Oct-2014) • Track Copyright Form *0 of 1 completed* • Assign to Batch (Due 06-Nov-2014) 1223 days overdue	Not Assigned / Potter, Ian	⊞
Original Article	Author, Alex				
WRK1-2014-11-0010 🔵	Maximising Editorial Office Efficiency with ScholarOne Manuscripts [View Submission]	06-Nov-2014	AE: Potter, Ian EIC: Not Assigned ADM: Potter, Ian • Make a Decision (Due 04-Mar-2015) 1105 days overdue	Potter, Ian	⊞
Original Article	Author, Annie				

3 Records Found.

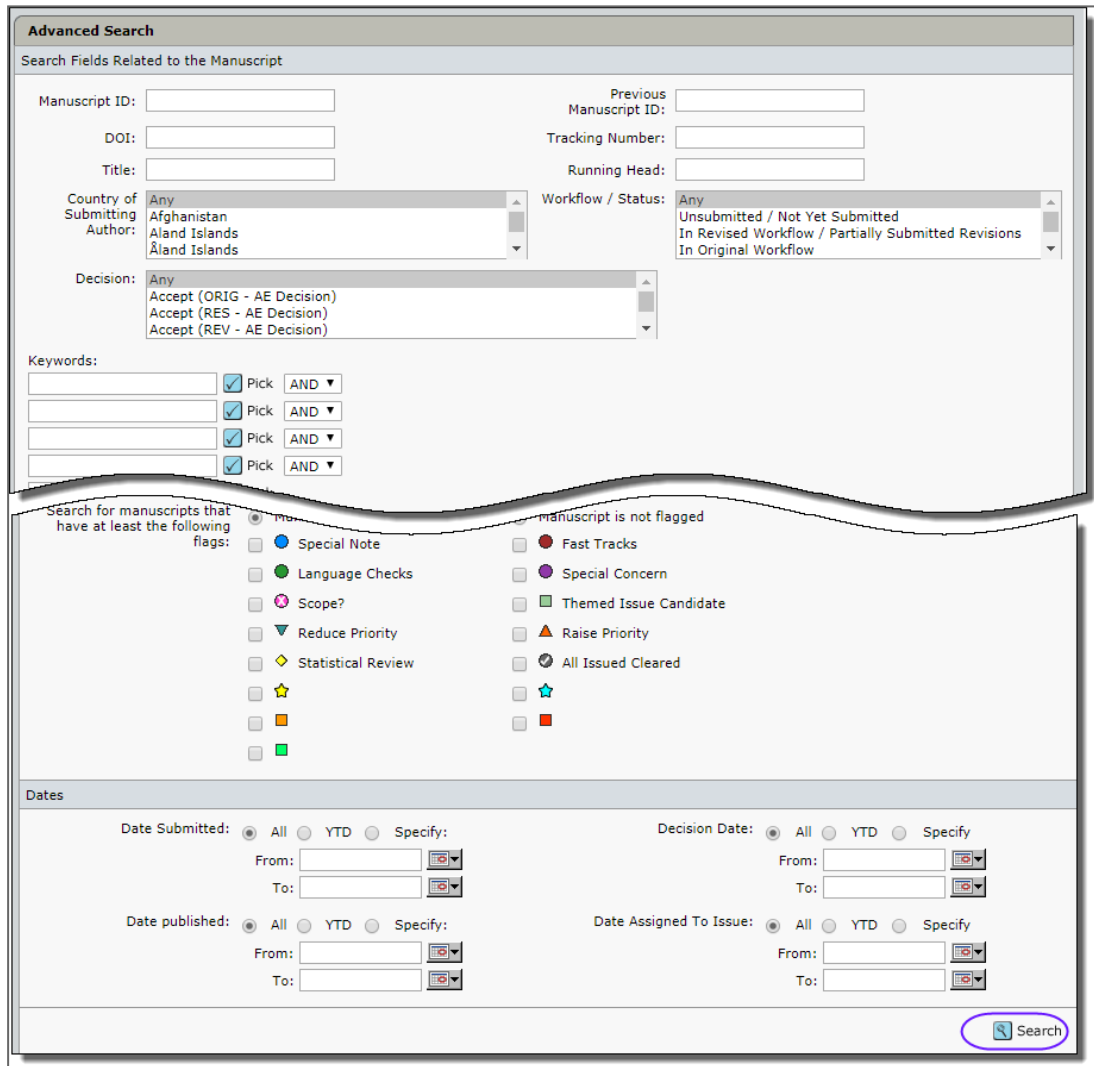*Search Criteria: Search for manuscripts that have at least the following flags = 🔵*

1-3 of 3

37. The companion paper information will now be viewable in the Companion Papers section with links to View the Submission and View Details.

⊟ Companion Papers

Manuscript ID	Manuscript Title	Date Submitted	Author	Status	Delete
Type					
MCU1-2013-04-0003	The amazing world of Education [View Submission] [View Details]	26-Apr-2013	Author, Alan	AE: Editor, Eddie (proxy) EIC: Not Assigned ADM: Baker, Gwen	✕
Original Article					

🔍 Search for a Companion Paper

38. A handshake icon will also appear on the Manuscript Header and is a direct link to the companion papers section.

39. If you no longer need the papers linked together, you can delete the paper from the list.

Note: Designating a companion paper is reciprocal - both papers will be linked to each other.

Flag this Manuscript

ScholarOne Manuscripts provides 10 color flags that can be used to mean special information regarding a manuscript. For example, a blue dot may mean the paper was submitted by a non-society member. You can use multiple flags by selecting more than one from the checklist.
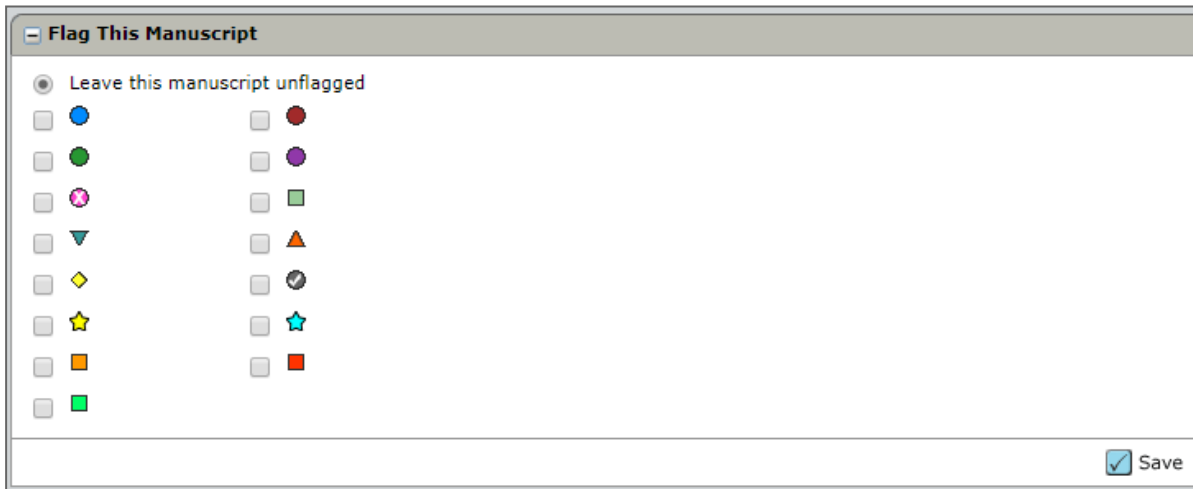
The colored flags appear after the Manuscript ID number. You can also create custom reports based on the colored flags.
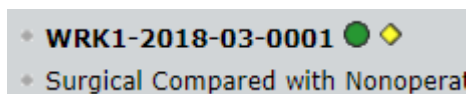
Note: You can have the flag labels configured with specific names meaningful to your site by the Client Solutions team. Be advised that a later change to these flag labels would change the label in all papers, including historical papers.

Adding & Viewing Notes

Notes are only viewable to the Admin and Editor roles. Authors and Reviewers will not see the notes section. Notes appear at the bottom of each tab. They can be configured to have the ability to attach files to this section, as well as the ability to carry over from the original submission to the revised submission.
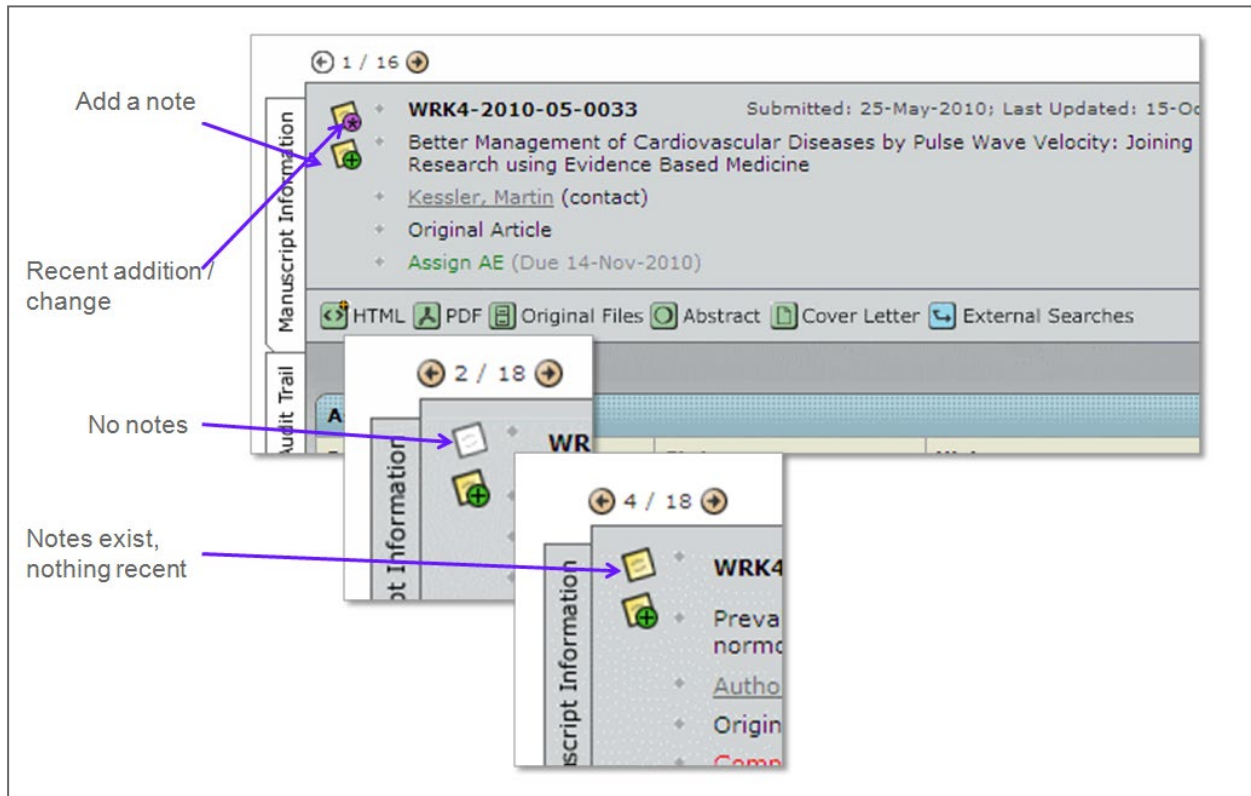
▶ Adding a Note

40. Click the **Add a Note** icon in the manuscript header.

41. The Add a Note screen displays.

42. Enter the **Title** and **Note** text.

43. Click the **Save** button.

44. Notes appear at the bottom of the Manuscript Details screen. You may add, edit, or delete notes from this section.
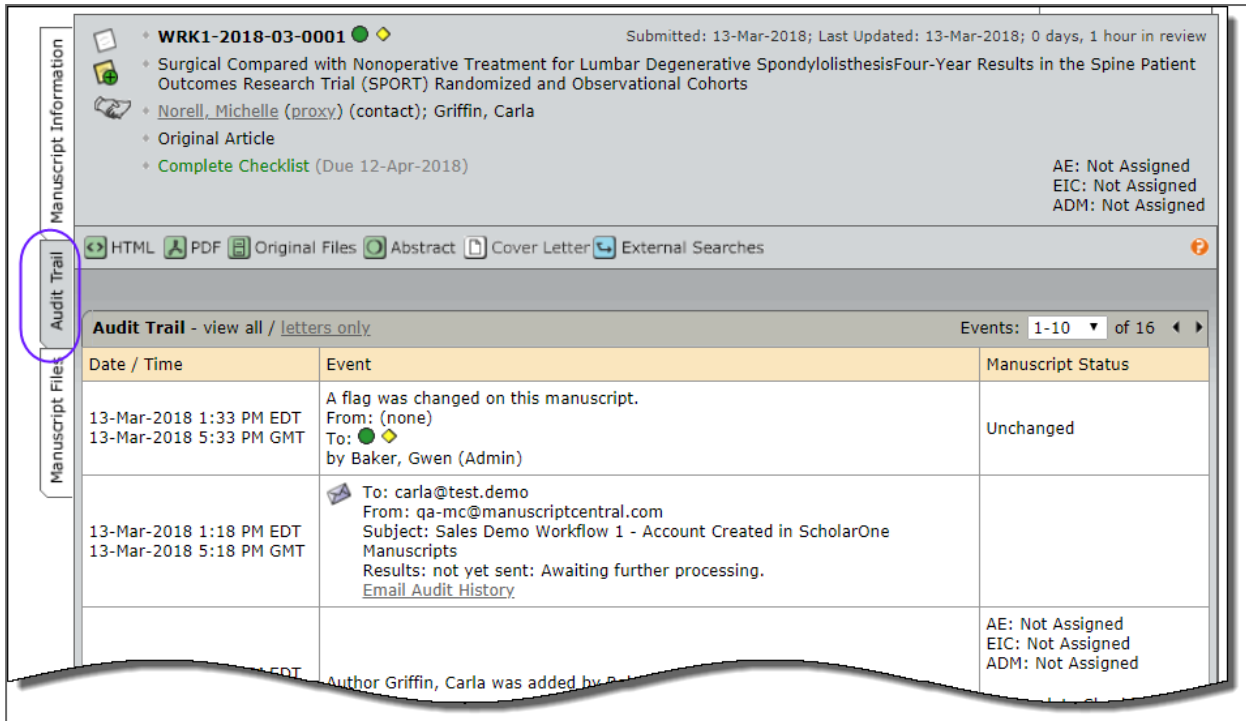

TIP: Notes can be configured to have the ability to carry over to revisions and to attach files.

THE AUDIT TRAIL TAB

The Audit Trail page contains a chronological listing of events, communications, and changes to a manuscript's history in the system. The audit trail page lists the time/date, event description,

and status of the actions, letters, and changes that occur. This page also displays the manuscript details Notes section.

Note: The Audit Trail tab displays for the Admin role and may also be configured for the EIC or AE.

The following events are tracked in the Audit Trail.

- **Actions**: If the event in the list was an action, the list displays the date of the action, the name of the action, who performed the action and their role, the date and time that the action was performed, and the status of the manuscript at the time the action was performed.

- **Changes**: If the event that occurred was a change, the list displays the date of the change, what general aspect of the manuscript was changed (manuscript metadata, custom questions, checklist), what specific aspect of the manuscript was changed (plus a link to view the previous value), the person and role who changed the aspect, the

date and time the change was performed, and the status of the manuscript at the time
the change was made.

- **E-mails**: If the event that occurred was the sending of a letter (any e-mail, including
  decision e-mails, automatic reminder e-mails, invitation e-mails, etc.), the list displays
  the date the letter was sent, the name of the letter, who sent the letter, and the date
  and time the letter was sent.

Tip: Clicking the **Envelope** icon opens a popup box with the text of the e-mail that was sent.
You have the option to re-send, forward, and edit from the popup box.

- **Revisions and Resubmissions**: If a revision or resubmission is created, it is indicated in
  the last audit trail entry. If the screen shows the details for a revised/resubmitted
  manuscript, the first entry in the audit trail indicates that a revision/resubmission was
  created and displays the original Manuscript ID.

- **File Management Activity**: The audit trail also displays file management activity. If a
  manuscript file is deleted, uploaded, or re-categorized (from the Manuscript Files tab),
  the activity is recorded and displayed in the audit trail.

Tip: You can view only correspondence by clicking the **Letters Only** link in the Audit Trail
pane title bar.

Uploading Correspondence

The audit trail allows users to enter correspondence sent or received outside of the system.
This allows you to include that correspondence as part of the manuscript record. A section at
the bottom of the audit trail allows you to save the information about the correspondence.

▶ **Upload Correspondence**

45. Complete the fields with information regarding the correspondence.

    a. Be sure to include both the date and time

    b. You may upload a file attachment with the correspondence or paste the text into the body field

46. Click the **Save** button. This correspondence is saved in the audit trail. It includes Last Updated information and a link to edit the entry.

THE MANUSCRIPT FILES TAB

Based on role permissions (typically Admin), your journal's Manuscript Files tab allows you to perform the following:

- Manage manuscript files

- Upload files

- Export files

- Change the manuscript's status
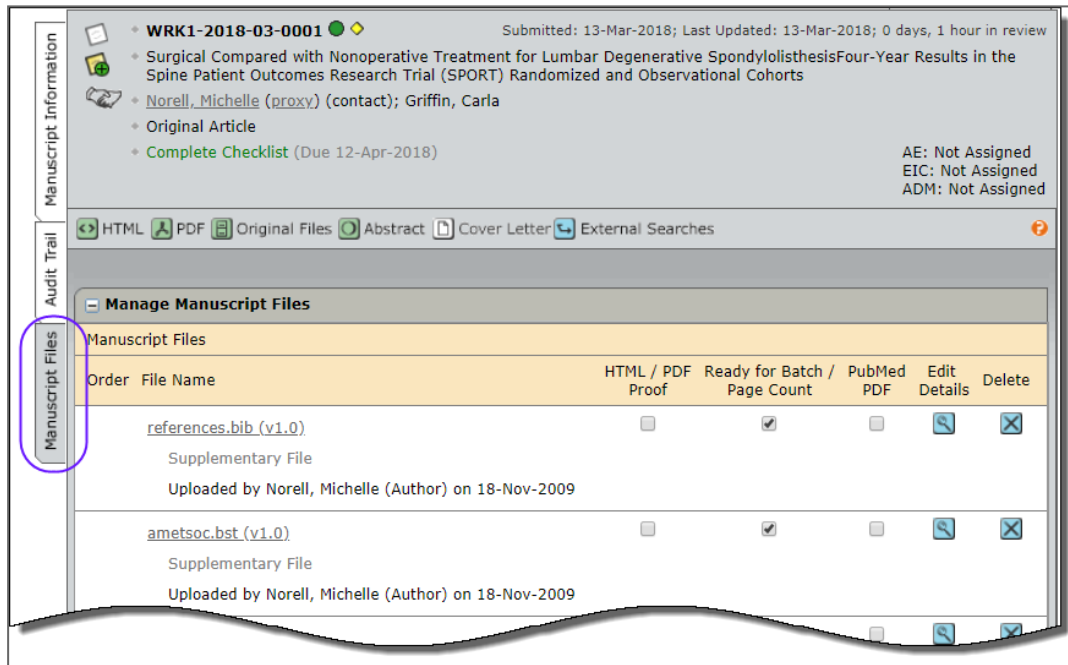
Note: You may access the Manuscript Files tab as shown above or select it directly from the Take Action drop-down list on the View Manuscripts screen.

Manage Manuscript Files

The Manage Manuscript Files section displays all files associated with a submission. It may include Manuscript, Review, Recommendation, and Decision files as well as file sent in offline. In addition to the displayed files, you may also upload files from this section.
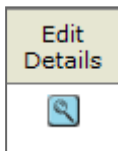
For each file, the following elements are displayed.

- **Order:** Change the display order of the files by selecting from the drop-down list

- **File Name:** Select the hyperlink to download the file

- **File Designation**: The type of file, e.g., "Main Document"

- **Uploaded By:** The name of the person who uploaded the file

- **Upload Date:** The date the file was uploaded

- **HTML/PDF Proof:** The checkbox will be checked if the file was included in the proof for review. You may deselect the checkbox if you wish to remove the file from the proof

- **Ready for Batch/Page Count:** This will usually be checked automatically and indicates that the file will be included in the export for production. You may deselect the checkbox if you wish to exclude the file from export

- **Edit Details:** Click the Edit Details button to edit the details including changing the file designation, uploading a later version

- **Delete:** We recommend you do not delete any files as you will lose historical data in the system. If you choose to delete a file, click the Delete button.

Edit Details

Click the **Edit Details** button to change the file designation, upload a later version of the file, and, in the case of images, edit the proof caption and/or file tags. The File Details page opens.

Here you can perform a variety of actions on the file, including:

- **Change the file designation**: Select from the drop-down list; see the *About File Designations* section of this document for additional information

- **Upload a new version of an existing file**: Click Browse to locate the updated file and click Upload. You can choose to designate the uploaded file as a minor or major version. We also recommend that you type notes in the Comments field.

- **Edit the Caption / Legend of a figure file**

- **View Version History**: When you upload a new version of a file, previous versions are stored in Version History. To avoid confusion, these versions are only viewable from File Details.

When finished making changes on the Edit Details page, please click the **Save** button to save and close the window.
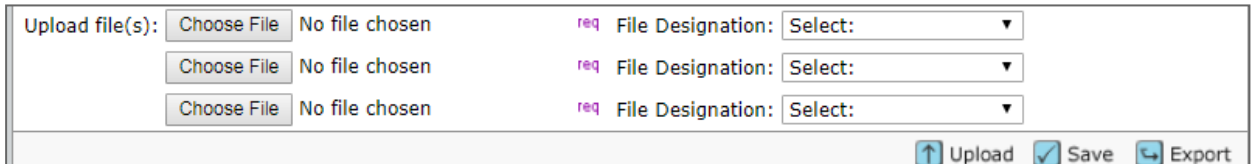
Uploading Files

As needed, you can upload new or additional files for a manuscript. When you upload files, the system automatically re-concatenates the manuscript PDF Proof.

Note: If you are uploading files for authors or reviewers while the manuscript is in their centers, then you should not use this. Instead, proxy as the author or reviewer and upload from the Author or Reviewer Centers.

Note: If your journal is using the Overleaf integration, see the *Uploading Overleaf Files* section below.

▶ **Upload Files**

47. Select the **Choose File** button in the Manage Manuscript files section. Browse to the file you wish to upload.
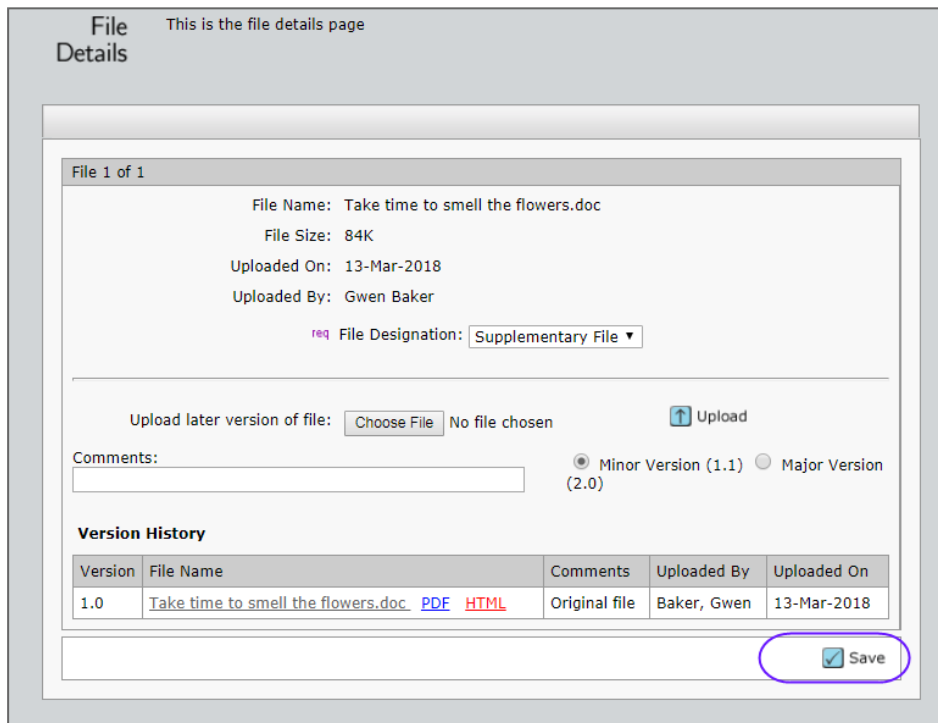

48. Select a **File Designation** from the drop-down list.

49. You may upload three files at a time.

50. Click the **Upload** button.

51. When the upload is complete, the File Details page displays. Review the information, enter a comment if needed, and click the **Save** button.

About File Designations

When uploading files, you must pick an appropriate file designation for each. Here is a brief description of file types that may be available. Your journal may have different items or different names.

- **Main Document**: The main content of a manuscript

- **Figure**: An image file that depicts a graph or chart

- **Image**: An image file that shows a drawing or photograph

- **Supplementary Files Not for Review**: Files intended for reference or background information, but not suitable for peer review

- **Supplementary Review Files**: Files that provide valuable background or reference information for peer review

- **Table**: An image or other format document that contains a table

- **Table Data**: The data used to create a table

- **TeX/LaTeX Suppl File**: Any file that is part of a TeX/LaTeX document

Additional Tex/LaTex Upload Information

When uploading a TeX/LaTeX main document, the system analyzes the file to determine what additional resource files (such as image files and bibliographic files) are necessary to complete the document. The system will not allow submission until the author has completed the full TeX/LaTeX document upload, including all necessary resource files. The system will also not allow submission of the manuscript if a file is designated as a TeX/LaTeX Suppl File but is not referenced by any TeX/LaTeX files uploaded to the system.

When you view the HTML proof of a manuscript, a link to the TeX/LaTeX document opens the PDF proof. This is necessary to ensure all formulas, and other special formatting, are rendered correctly.
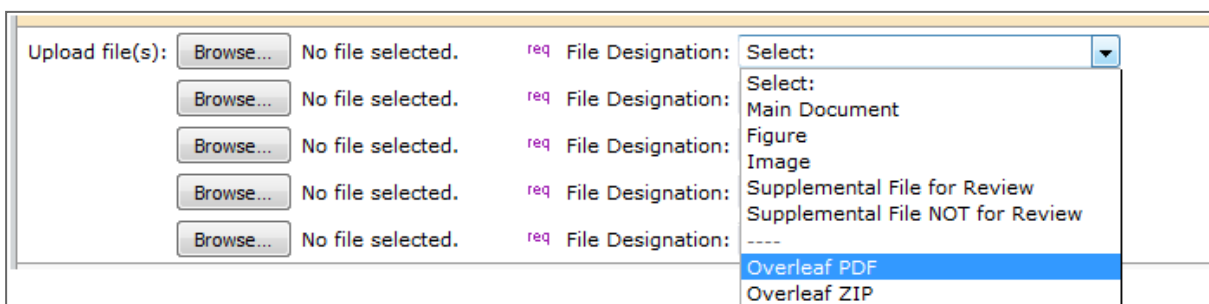
Files uploaded as TeX/LaTeX Suppl Files will not be viewable as individual files in the HTML proof and will not be rendered independently of the entire TeX/LaTeX document. Therefore, images and other content will show up in the PDF proof at the location specified in the

TeX/LaTeX document. In addition, captions for images displayed within a TeX/LaTeX proof must be created in the TeX/LaTeX document, since image proofs cannot be created separately.

Uploading Overleaf Files

Overleaf files are uploaded directly to ScholarOne Manuscripts through the integration. Authors create and edit the files in Overleaf. Refer to the Author Guide for details. The instructions below detail how an Admin may upload Overleaf files.

If an Author or Admin removes the Overleaf files from a submission, the Admin can upload Overleaf files if they are provided to them by the Author. Two new designations have been created to ensure the system reads the files correctly, Overleaf PDF and Overleaf ZIP.

Once an Overleaf file is uploaded, it will marked by the Overleaf logo.
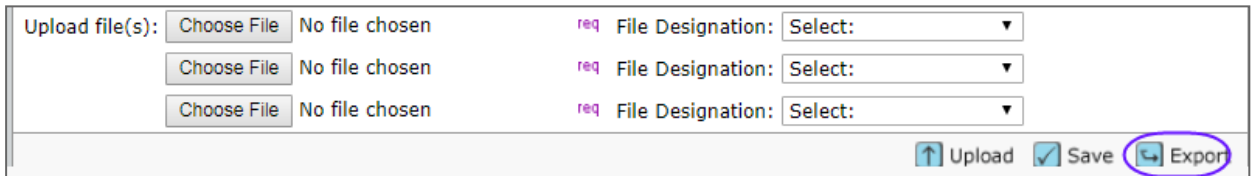
Exporting files

You may export a manuscript directly from the Manuscript Files tab. All files with "Ready for Batch / Page Count" checkbox selected will export.
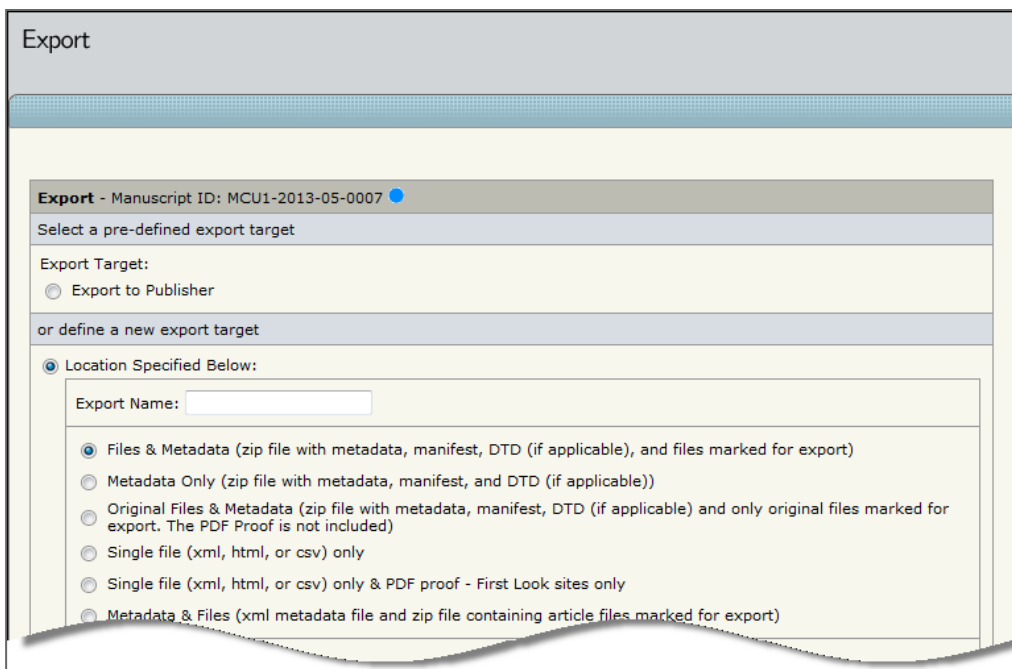
▶ Export Files

52. Click the **Export** button.

53. The Export window displays.

54. Choose one of the following two options:

    a. Select a pre-defined export target, or

    b. Define a new export target and format

        i.   Enter the **Export Name**, optional

        ii.   Select a radio button for the types of files you want to export

        iii.   Specify the **Location**
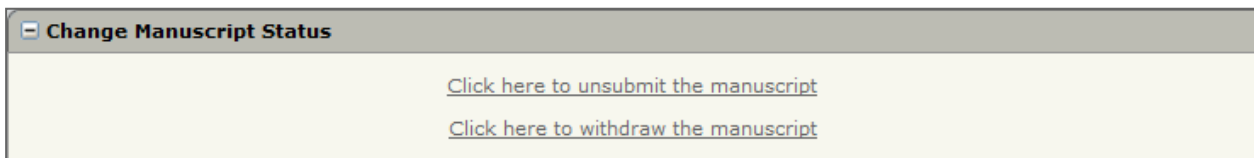
        iv.   Select a **Format**

v.   Select when it will be available

55. Click the **Export** button.

56. The Export History section lists all exports that have been performed for this manuscript.

Note: See Batch Configuration in the Production Center Guide for detailed information.

Changing the Status of a Manuscript

If the author has made an error in their manuscript submission and wishes to edit it, or if the journal would like to withdraw the submission from peer review, the Admin may either unsubmit or withdraw the manuscript by clicking the appropriate link. Perform these actions from within the manuscript's Manuscript Files tab.

Unsubmitting a Manuscript

You should only unsubmit a manuscript that has not yet begun the peer review process because it will remove all history of work on the manuscript so far by the editorial office. Often, unsubmitting a manuscript is used when an author has additions or removals to make to the manuscript files. Clicking this link places the manuscript in the author's Unsubmitted Manuscripts list. The manuscript retains its Manuscript ID number and the author may edit it and re-submit.

Note: Do not unsubmit a manuscript that has a decision.

Withdrawing a Manuscript

This action takes the manuscript out of the peer review process and places it back in the author's dashboard, in the Withdrawn Manuscripts list. Withdrawing a manuscript makes it unavailable to resubmit. (Use Advanced Search if you need to locate a manuscript that has been withdrawn.) The manuscript ID number is no longer used by the system.

Note: If you need to withdraw a manuscript that has already begun the review process, first remove all reviewers.
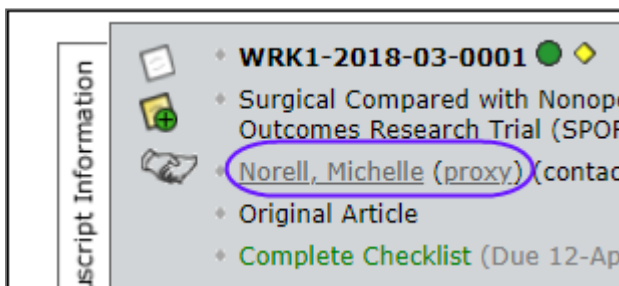
PROXY

As the Journal Administrator, you have the unique ability to proxy (log in) as another user, which means that you may perform tasks in the system as that user. This is helpful when you need to push papers through the review process or assist a user with any of their tasks in the system.

The upper right of the page indicates when you are proxied in as another person. *ScholarOne Manuscripts* logs all actions you perform while you are proxied as another user. This information is tracked in the Audit Trail tab.

Key Points

- You may proxy as another user whenever you see a **proxy** link near a user's name.

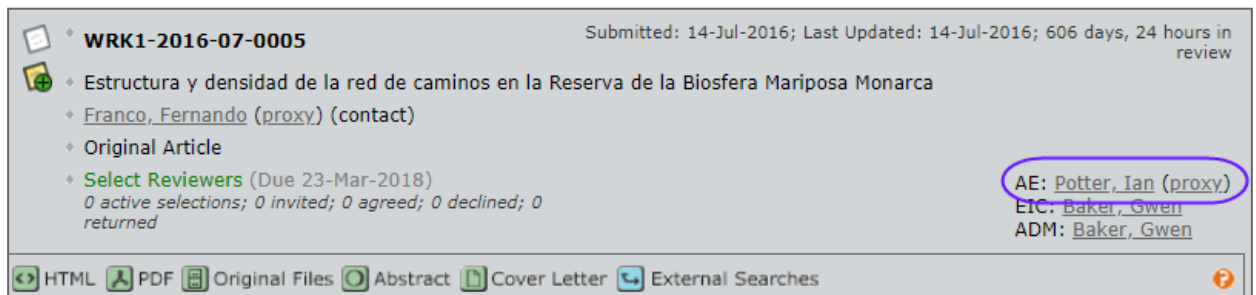- You can return to your account using the **End Proxy** link in the header.
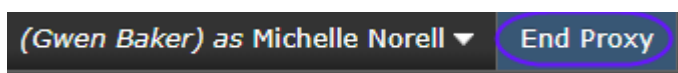
- You cannot "double-proxy" (proxy as another user when you have already proxied). You must first select **End Proxy**. E.g., if you are proxied as the Associate Editor, you may not then click the Proxy link to proxy as the Reviewer.

There are several ways to access this capability. Two methods are described below.
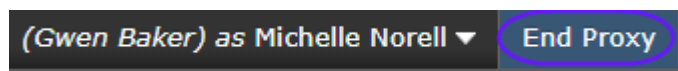
▶ Proxy as another User via Manuscript Details

57. Select a hyperlink in the **Admin Lists** section of the Dashboard.

58. The View Manuscripts page displays. Select the **View Details** link in the Take Action column.

59. The Manuscript Information page displays. All users associated with the manuscript appear in the header with a **proxy** link next to their names.
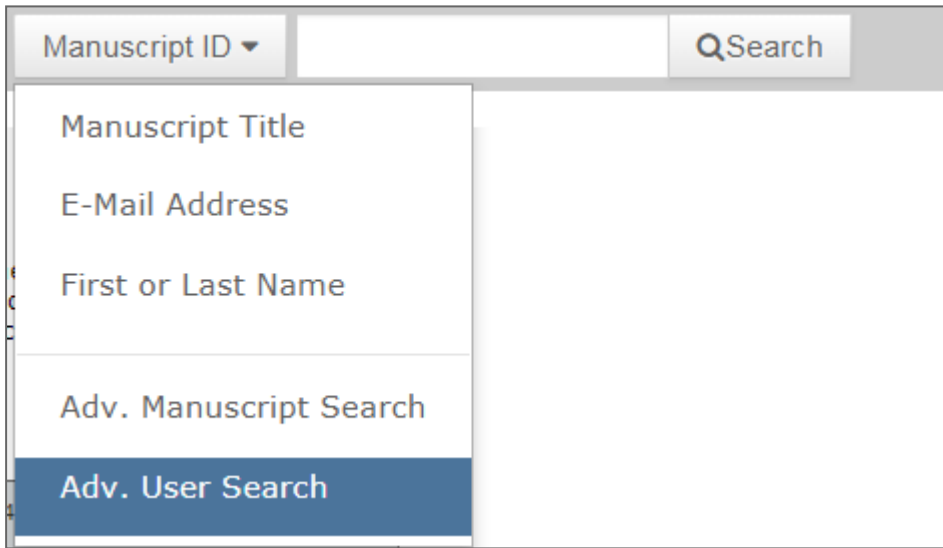

60. Select the **proxy** link.

61. When you are proxied in as another user, you will see a note in the upper right corner. It will have your name and the user's name you are proxied as.
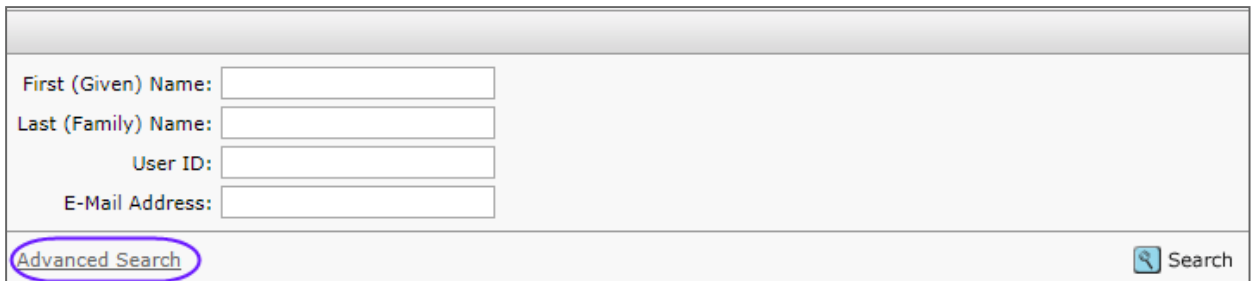

▶ Proxy as another User via User Search

62. Search for users using either the **Adv. User Search** in the Quick Link area on the top right of pages or **through Admin Tools > User Administration** area of your dashboard. (See the *User Search* section of this guide for detailed instructions.)
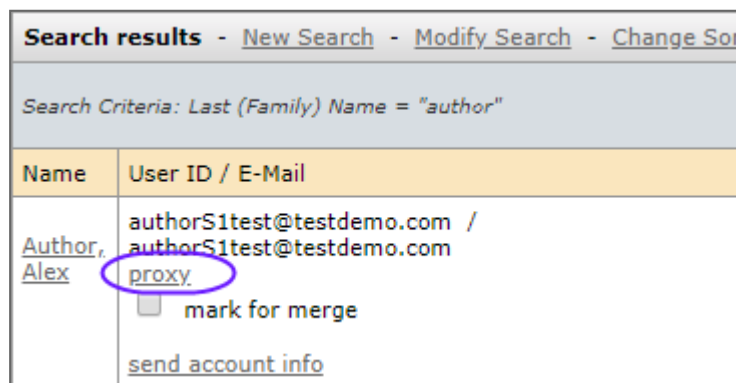
OR

63. When you have located the person, click the **Proxy** link.

64. When you are proxied in as another user, you will see a note in the upper right corner. It will have your name and the user's name you are proxied as.

(Gwen Baker) *as* Michelle Norell ▼

▶ **Return to Your Role**

65. To return to your role, you simply click the **End Proxy** link in the upper right corner of the screen.

(Gwen Baker) *as* Michelle Norell ▼   End Proxy

66. The proxy will be removed and you will see "Logged in as" your name in the upper right.

Note: You cannot "double proxy" (proxy as another user when already proxied). To proxy in as another user, first click **End Proxy**, then proxy as the next user.

JOURNAL ADMINISTRATOR CENTER PEER REVIEW TASKS

In the following section you will learn about the tasks that the Journal Administrator is responsible for, as well as any other times during the peer review process that you might need to assist another user with a function. We recommend that you review the user guides for the Authors, Editors, and Reviewers to fully understand the functions they perform in the system.

In this section, we will follow the Sample Review Process shown below, referring to additional user guides where appropriate.

Sample Review Process:

Author Submits
      Admin Checks and Passes to Editor-in-Chief
            Editor-in-Chief Assigns to Associate Editor
                  Associate Editor Invites and/or Assigns Reviewer(s)
                  Reviewers Score
                        Associate Editor Recommends Decision
                            Editor-in-Chief Makes Final Decision

As Journal Administrator, you have specific tasks to perform on manuscripts as part of the review process. This work begins in the **Admin Lists** section of your dashboard. Here you view the number of manuscripts that are in each status category or queue. As the Admin, you will see all status categories or queues and the number of manuscripts in each of those queues for the entire journal. Other roles, such as Editors and Associate Editors, will view only those manuscripts assigned to that role or user.

If a queue has an active hyperlink, there are manuscripts in that stage of the peer review process. Clicking any of the links opens the View Manuscripts page for that task. The number of manuscripts in that stage appears to the left of the link.

Admin Lists

You may click on the manuscript list title to view a full listing of manuscripts in each status, or click on the number next to the list to jump directly to the first manuscript in the list.

- 0 Admin Complete Checklist
- 0 EIC Assign AE
- 0 Select Reviewers
- 0 Invite Reviewers
- 1 Overdue Rev
- 1 Assign Revie
- 0 Awaiting Rev
- 0 Overdue Rev
- 1 Ready for Fin

In Production

- 0 Complete Pro
- 0 Assign to Bat
- 0 Assigned to E
- 0 Awaiting Forr
- 0 Awaiting Forr
- 0 On-Hold Forr

Invited Papers

- GO Create a Mar
- 0 Select Autho
- 0 Invite Author
- Assign Autho

Editor-in-Chief Lists

You may click on the manuscript list title to view a full listing of manuscripts in each status, or click on the number next to the list to jump directly to the first manuscript in the list.

- 0 EIC Assign AE
- 0 Select Reviewers
- 0 Invite Reviewers
- 1 Assign Reviewer
- 0 Awaiting Reviewer Scores
- 0 Overdue Reviewer Scores
- 1 Ready for Final Decision

Reports

- ⊞ **Manuscript**
- ⊞ **Peer Revie**
- ⊞ **User Perfo**
- Publication F Reports

Associate Editor Lists

You may click on the manuscript list title to view a full listing of manuscripts in each status, or click on the number next to the list to jump directly to the first manuscript in the list.

- 0 Select Reviewers
- 0 Invite Reviewers
- 0 Overdue Reviewer Response
- 0 Assign Reviewer
- 0 Awaiting Reviewer Scores
- 0 Overdue Reviewer Scores
- 0 Ready for Final Decision

Note: Journal list configurations vary widely among journals and roles.

WORKFLOW STEP: AUTHOR SUBMITS MANUSCRIPT

The first step in the peer review process is for an Author to submit a manuscript. The Admin may need to assist the author in the steps for submitting the manuscript. The Admin may proxy as the Author. Please review the *Author Guide* below.

[*ScholarOne Manuscripts* Author Guide](#)

Additionally, the Admin may need to assist the Author with account setup. Please see the *Adding User Accounts* section of this guide.
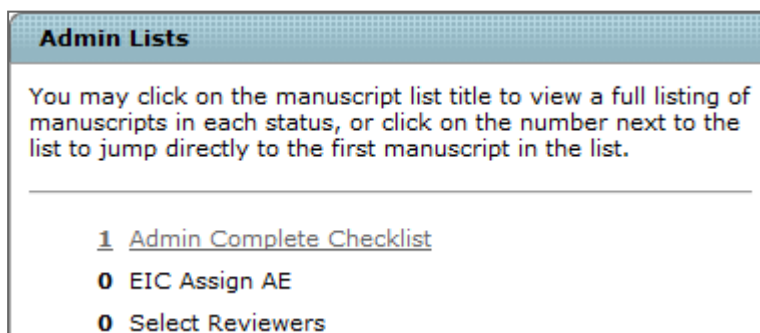
WORKFLOW STEP: ADMIN COMPLETES CHECKLIST

The admin reviews the submission to ensure it is complete and follows journal submission requirements before sending it into the peer review process.

Access the Manuscript

▶ Access Manuscript for Check-In

67. From the Admin Dashboard, click the **Admin Complete Checklist** link.

Admin Lists

You may click on the manuscript list title to view a full listing of manuscripts in each status, or click on the number next to the list to jump directly to the first manuscript in the list.

1 Admin Complete Checklist
0 EIC Assign AE
0 Select Reviewers

68. The View Manuscripts page displays a list of all manuscripts awaiting check-in.

69. In the Take Action drop-down list, choose **Admin Checklist**. (Alternately, you can select View Details and from there click the Complete Checklist tab.)

Web of Science Group

- **Unsubmit** allows the admin to move the paper back to the Author

- **Approve** moves the paper to the next step in the process

- **Reject** will create a reject decision and letter to the Author

- **Reject and Transfer** will allow the admin to transfer the paper to another journal

- **Save** will save all changes you make in the checklist

Viewing Manuscript Proofs and Files

Viewing manuscript proofs is generally the first action the Admin will take for any manuscript. From the Manuscript Details page, view manuscript files using the icons contained in the header. Depending on your journal's preference, you may view some or all of the following options.

▶ Viewing HTML Proofs and Files

70. On the Manuscript Details page header, click the **HTML** button.

71. The HTML Proof displays in your browser and may contain:

- Links to figures called out in the text

- References link to Web of Science or PubMed (if properly formatted and configured by your journal)

72. All of the submission files display separately in the column to the left of the main document. Click the links to view the individual files.

▶ Viewing PDF Proofs and Files

73. From the Manuscript Details page, click the **PDF** button.

74. The concatenated manuscript files display in Adobe Acrobat. By default, the first page of the proof is the cover and metadata. The PDF will contain all files submitted by the author that have the HTML / PDF Proof checkbox selected on the manuscripts files tab. If something is missing, check which files are checked.
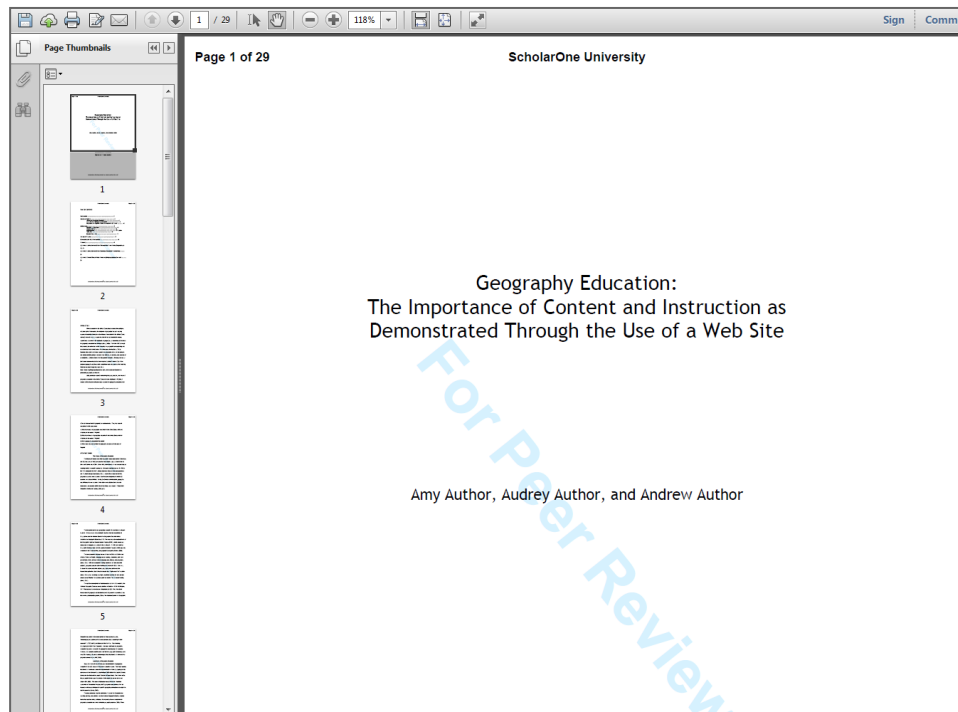
▶ Viewing Supplementary Files

75. From the Manuscript Details page, click the **Supplementary Files** button.

[+] Supplementary Files

76. The Supp. Files for Review page displays. These are files sent in by the author with the manuscript. Your journal may be configured to designate file types that automatically separate files into "For Review" and "Not For Review."
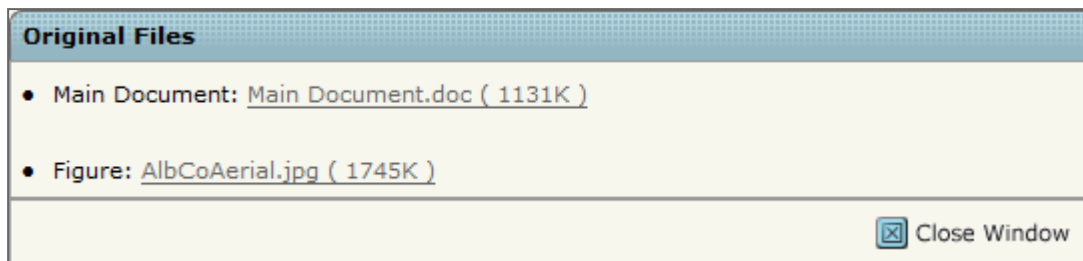
Supp. Files for Review

• Supplementary File for review: cactus.jpg (301K)

[X] Close Window
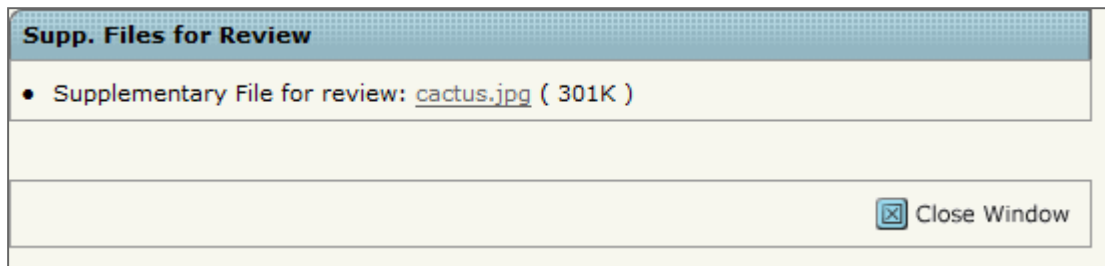
77. Click the **File Name** link to view a file.

▶ Viewing Original Files

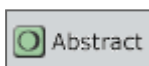78. From the Manuscript Details page, click the **Original Files** button.

[目] Original Files

79. The Original Files page displays the original submission files (e.g., .DOC, .JPEG, etc.). Select a link to open a file.
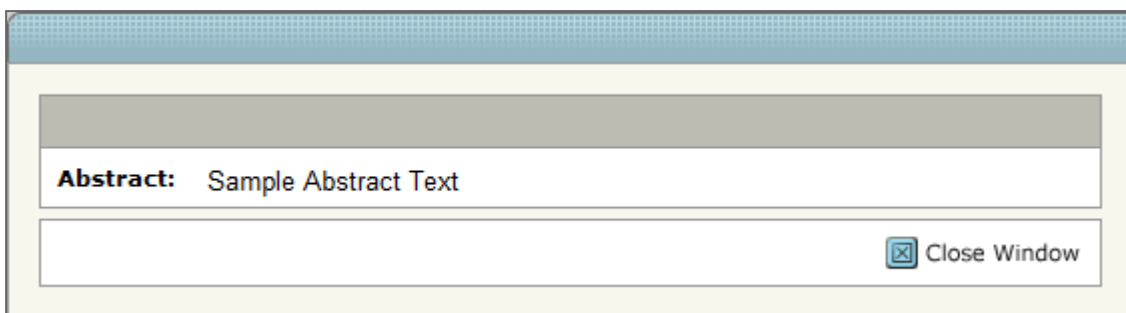
Original Files

• Main Document: Main Document.doc (1131K)

• Figure: AlbCoAerial.jpg (1745K)

[X] Close Window

▶ **Viewing the Abstract**

80. From the Manuscript Details page, click the **Abstract** button.

Ⓞ Abstract

81. The Abstract page displays the abstract as submitted with the manuscript.

Abstract: Sample Abstract Text	
	☒ Close Window

Completing the Admin Checklist

Many review processes include a step where manuscript files and details are reviewed prior to sending the manuscript out for peer review. If your journal has configured this step into the review process, the first step in the Admin Lists section of the dashboard will be to complete the Admin Checklist.

▶ **Admin Complete Checklist**

82. Tasks to complete the Admin checklist may vary by journal, but in most cases, you will be required to review the manuscript and supporting files. To do so, use the **HTML** or **PDF** links in the header, and any other appropriate file links. (See previous section for details.)

83. Complete all tasks listed in the Admin Checklist, checking the boxes when complete. Complete any additional fields as required.

84. Click the **Approve** (or Checklist Complete) button to move the manuscript to the next step in the peer review process.

85. Click the **Reject** button to reject the manuscript immediately. The system requires you to confirm this choice. Some journals give you the option to reject a manuscript immediately.

86. Click the **Save** button to save your work without moving the manuscript to the next step in the peer review process.

Note: There is also the option to send the manuscript back to the author using the Unsubmit a Manuscript on the manuscript files page. See the Changing the Status of a Manuscript section of this manual.

Tip: If the Admin does not have the ability to **Reject** a manuscript, a **Checklist Complete** button is displayed in place of the **Approve** button.

WORKFLOW STEP: EDITOR-IN-CHIEF ASSIGNS TO ASSOCIATE EDITOR

The next step in the peer review process is for the Editor-in-Chief to assign the manuscript to an Associate Editor. The Admin may be required to assist the EIC in this process. Please review the *Editor Guide* below.

ScholarOne Manuscripts Editor Guide

Additionally, the Admin may need to assist the EIC with account setup. Please see the *Adding User Accounts* section of this document.

WORKFLOW STEP: ASSOCIATE EDITOR INVITES AND/OR ASSIGNS REVIEWER(S)

The Associate Editor assigns the manuscript to a Reviewer. The Admin may be required to assist the AE in the process. Please review the *Editor Guide* below.

ScholarOne Manuscripts Editor Guide

Reviewer Locator

Some site will have a search option for Associate Editors called the **Reviewer Locator**. Reviewer Locator analyzes manuscript metadata and abstracts, linking key entities and topics to create a manuscript "fingerprint." This fingerprint is then compared to the fingerprints of other papers indexed in the **Web of Science**, finding relevant research in the same field and thus, qualified reviewers.

When Reviewer Locator is configured, results from the Reviewer Locator service display on the **Select Reviewers** tab just below the **Author's Preferred/ Non-Preferred Reviewers**.

Search requests are generated automatically for each manuscript when it reaches the Select Reviewers task so results are waiting for the editor as soon as they enter the site.

Note: Only submissions with an abstract will return Reviewer Locator results.

Each potential reviewer found in the Web of Science is returned with a set of biographic and bibliographic data designed to help the AE assess the potential reviewer's suitability for the submitted manuscript. In addition to the reviewer's name, their email address and institutional affiliation will be provided, when available. Their ORCID iD will be provided as a link to their ORCID record (if configured for the site).
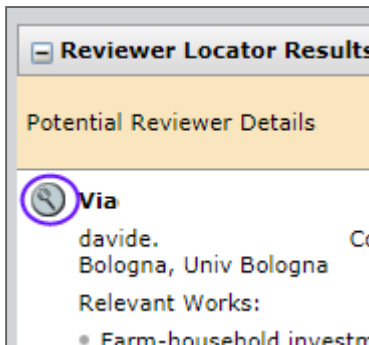
In addition, up to three papers published by the potential reviewer will be listed in order of relevance to the submitted manuscript. Each listed publication will have a **View Details** link which, when selected, will bring up more information about the paper. In addition to authors, journal name and publication year, both the DOI and Web of Science record are provided as links for quick access to additional information.

When new Reviewer Locator results are received by a ScholarOne site we attempt to match these potential reviewers to user accounts already in the system. We use both email address and ORCID iD to generate matches. For example, if a new reviewer is received and this person shares an email address with an account already on the site, we link them together. This helps prevent the creation of duplicate accounts when an AE wants to add a new account based on a

Reviewer Locator results. It also allows the AE to view not only information from Web of Science when making their reviewer selections but also current reviewer statistics from the site such as current reviews, days since last review, average R-score, etc. Review Locator results matched to an existing account will appear with a magnifying glass logo next to their name. This logo will link to their Person Details Pop-up page.
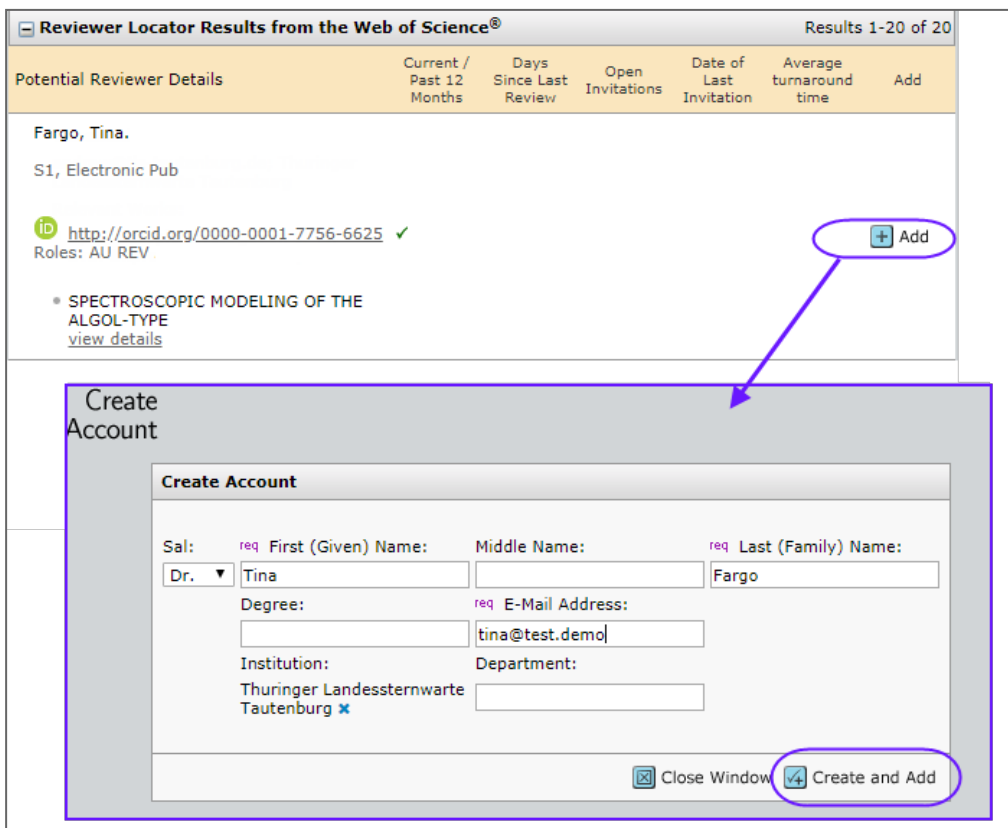
When adding a reviewer from Reviewer Locator, the EA clicks the **Add** button. A new window will appear to create an account for the reviewer and add them into the reviewer list for invitation.

Additionally, the Admin may need to assist the AE with account setup. Please see the *Adding User Accounts* section of this document.

WORKFLOW STEP: REVIEWERS SCORE

The Reviewer will review and score the manuscript. The Admin may be required to assist the Reviewer in this process. The Admin may proxy as the Author. Please review the *Reviewer Guide* below.

ScholarOne Manuscripts Reviewer Guide

Additionally, the Admin may need to assist the Reviewer with the following functions:

- Account Setup. Please see the *Adding User Accounts* section of this document

- Granting Extensions to Reviewers. Please see the *Using the Person Details Page* section of this document.

- Editing a completed review. Please see the *Editing a Completed Review or Recommendation* section of this document.

Editing a Completed Review or Recommendation

Administrators have the ability to edit completed review or recommendation forms without rescinding them. This may be useful if there is a comment to the author that is not appropriate or if there is anything else that needs to be edited. Exercise caution in editing; if edited, there is no way to get the original review back.

▶ Edit a Completed Review or Recommendation

87. To access the completed review form, select the appropriate link from the **Admin Lists** section of the Admin Dashboard. Alternately, use **Quick Search** to locate the manuscript.

88. From the View Manuscripts page, select from the **Take Action** drop-down list. You may access the completed review from the **View Details** page or from one of the actions such as **Assign Reviewer**s or **Make Decision**.
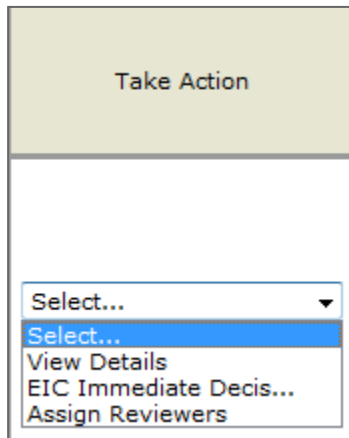
89. You will find the **View Review** link either in the Status column or in the Reviews section on the right.

90. The Completed Review form displays. Click the **Edit** button at the bottom of the screen. The form opens in editable mode.

91. Make changes as needed and then click the **Save** button. Any changes made to these forms are tracked in the Audit Trail.

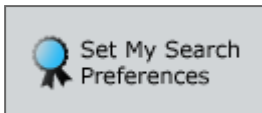## Setting Search Preferences for Reviewer Search

Editors and Admins may set search preferences for how they search for reviewers. The Admin may also proxy in as the Editor and set these preferences on their behalf.

▶ Set Search Preferences

92. Access the **Assign Reviewers** tab for a manuscript requiring reviewers to be assigned.

Assign Reviewers
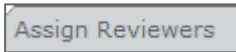
93. Select the **Set My Search Preferences** button on the right side of the screen.

Set My Search
Preferences

94. The **Set My Preferences** screen displays with options for reviewer search and sort order. Select the options you wish to use.

When I am searching for Reviewers, I would like the search options displayed as follows:

	Expanded	Collapsed
Author's Recommended / Opposed	●	○
Reviewer Locator Results from the Web of Science	●	○
Quick Search	○	●
Related Papers Search	○	●
Reviewer Auto-Suggest	○	●
Advanced Search	○	●

When I am searching for Reviewers, I would like the following information populated by default:

Reviewer Activity Information

# Current Assignments	Min:	Max:
# Assignments in Past 12 Months	Min:	Max:
# Days Since Last Review Submitted	Min:	Max:
# Invitations Declined in Past 12 Months	Min:	Max:
R-Score	Min:	Max:

In the Reviewer Search Results and Preferred/Non-Preferred Reviewers area, I would like the following fields displayed (select a maximum of five fields) :

Reviewer Search Results

- ☑ # Current Assignments / # Assignments in Past 12 Months
- ☑ Days Since Last Review
- ☐ Average R-Score
- ☑ # Open Invitations
- ☑ Date of Last Invitation
- ☑ Average turnaround time

Number of search results per page: 30 ▼
☐ Exclude unavailable reviewers

Sort Order

Quick Search
Primary Sort: Name (Last, First) ▼ Ascending ▼
Secondary Sort: Number of Current Assignments ▼ Descending ▼

Related Papers Person Search
Primary Sort: Name (Last, First) ▼ Ascending ▼
Secondary Sort: Number of Current Assignments ▼ Descending ▼

Auto-Suggest
Primary Sort: Name (Last, First) ▼ Ascending ▼
Secondary Sort: Number of Current Assignments ▼ Descending ▼

Advanced Search
Primary Sort: Name (Last, First) ▼ Ascending ▼
Secondary Sort: Number of Current Assignments ▼ Descending ▼

Close Window ✓ Save

95. Click the **Save** button.

WORKFLOW STEP: ASSOCIATE EDITOR RECOMMENDS DECISION

The Associate Editor will recommend a decision on the manuscript. The Admin may be required to assist the AE in this process. Please review the Editor Guide below.

ScholarOne Manuscripts Editor Guide

WORKFLOW STEP: EDITOR-IN-CHIEF MAKES DECISION

The Editor-in-Chief will make a final decision on the manuscript. The Admin may be required to assist the EIC in this process. Revisions may be required of the Author before a final decision is made or a final decision may be made at this point. Please review the Editor Guide below.

ScholarOne Manuscripts Editor Guide

WORKFLOW STEP: PRODUCTION CENTER

Some sites utilize the Production Center to prepare accepted manuscripts for publication. The Production Center is also a place that can be used to export submissions to a depository such as an FTP site or email address. It may also be used for in-house exports for independent publishers or journals.

The Admin or a Production Editor role may perform the Production Center tasks. Please review the Production Center Guide below.

ScholarOne Manuscripts Production Center Guide

INVITED PAPERS

Invited Papers is a method of formally inviting an author to submit a manuscript to your Journal. This can be useful to invite specific authors to submit a manuscript, or you can determine a topic and match to authors in the system based on keywords. Once submitted, an invited paper follows the same peer review process as all other manuscript submissions.

The basic steps in the process are as follows:

- Create an Invited Paper (Manuscript Stub)

- Select an Author

- Invite the Author

- Author Submits and Invited Paper

CREATE AN INVITED PAPER (MANUSCRIPT STUB)

The process to create an invited paper starts with the creation of the Manuscript Stub or draft. This is the start of the submission process and acts as a placeholder in the system for the paper. The Admin creates the stub by completing some basic information. Much of the information will be left blank to be completed by the Author during submission.

▶ Create a Manuscript Stub

96. In the **Invited Papers** section of the Admin Lists, select the **Go** link.

Invited Papers

GO Create a Manuscript Stub
7 Select Author
3 Invite Author
2 Assign Author
0 Awaiting Author Submission
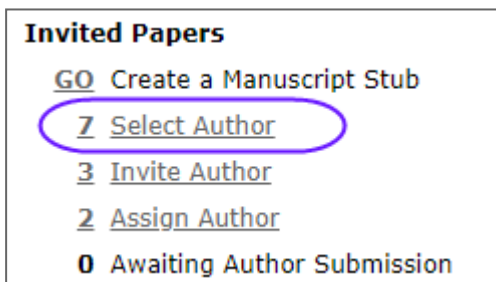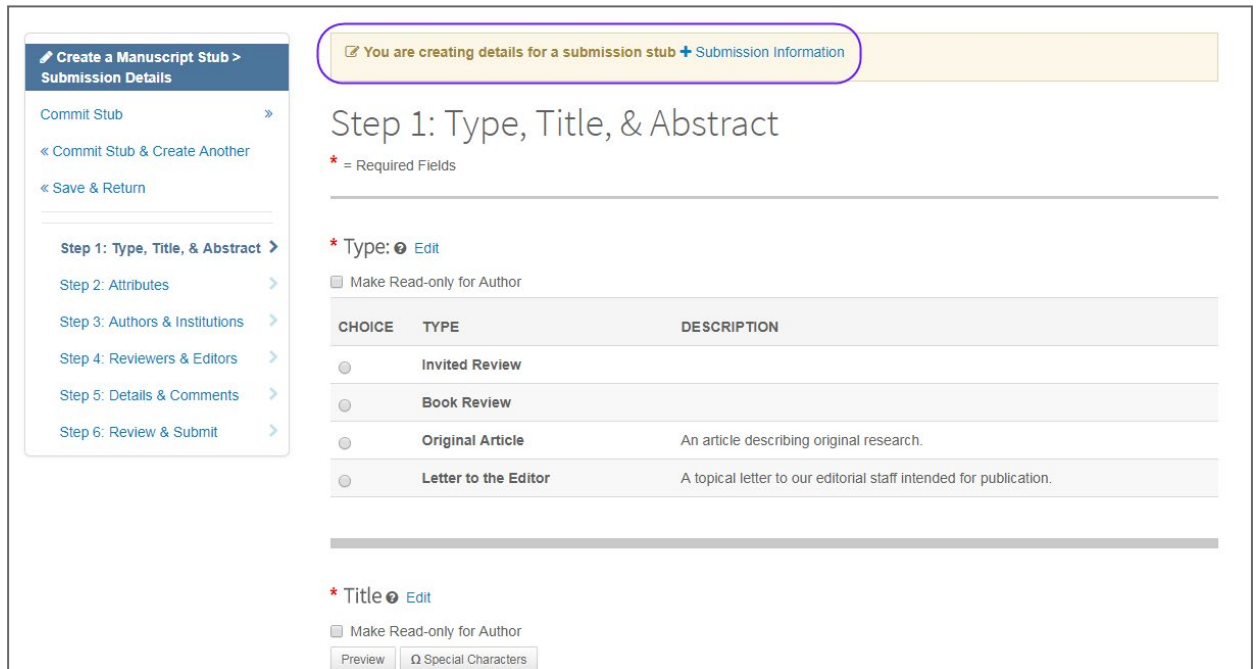
97. The **Manuscript Details** screen displays. The header says **Draft** *Invited* and a yellow ribbon on the left side of the screen.

98. **Add a Stub**: Complete fields on the **Add a Stub** section as needed. You may leave all fields blank or with default values and still create the stub, however there may be some fields you wish to use.

   a. **Status**: Should always be set to **Active.** The other options that appear in the dropdown list are for Books and Encyclopaedia sites.

   b. **Tracking Number:** You may enter your own tracking number. Your site may be configured so that the tracking number becomes the Manuscript ID number. You can also create reports on the tracking number.

   c. **Author Submission Template:** If needed, you can upload a template for the Author to follow. This may be a submission format for a specific type of document, like a book review.

   d. **Assign to Issue:** If your site is using Issue Management in the Production Center, you can pre-assign the invited paper to an issue.

99. Click the Add Stub Submission Details button.

Add Stub Submission Details >

100. **Type**: You may select the manuscript type from a list. You have the option to make this read-only so that the author cannot change the manuscript type later in the submission process.
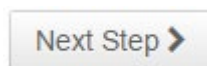
101. Click the **Next Step** button.

102. **All Other Fields**: We recommend you leave all other fields at the default values or blank. The Author will complete them as appropriate during the submission process.

Tip: Do not enter the Author in the stub.

103. Click the **Commit Stub** button.

Commit Stub »

SELECT AN AUTHOR

The process of selecting the Author is same process a selecting a Reviewer.
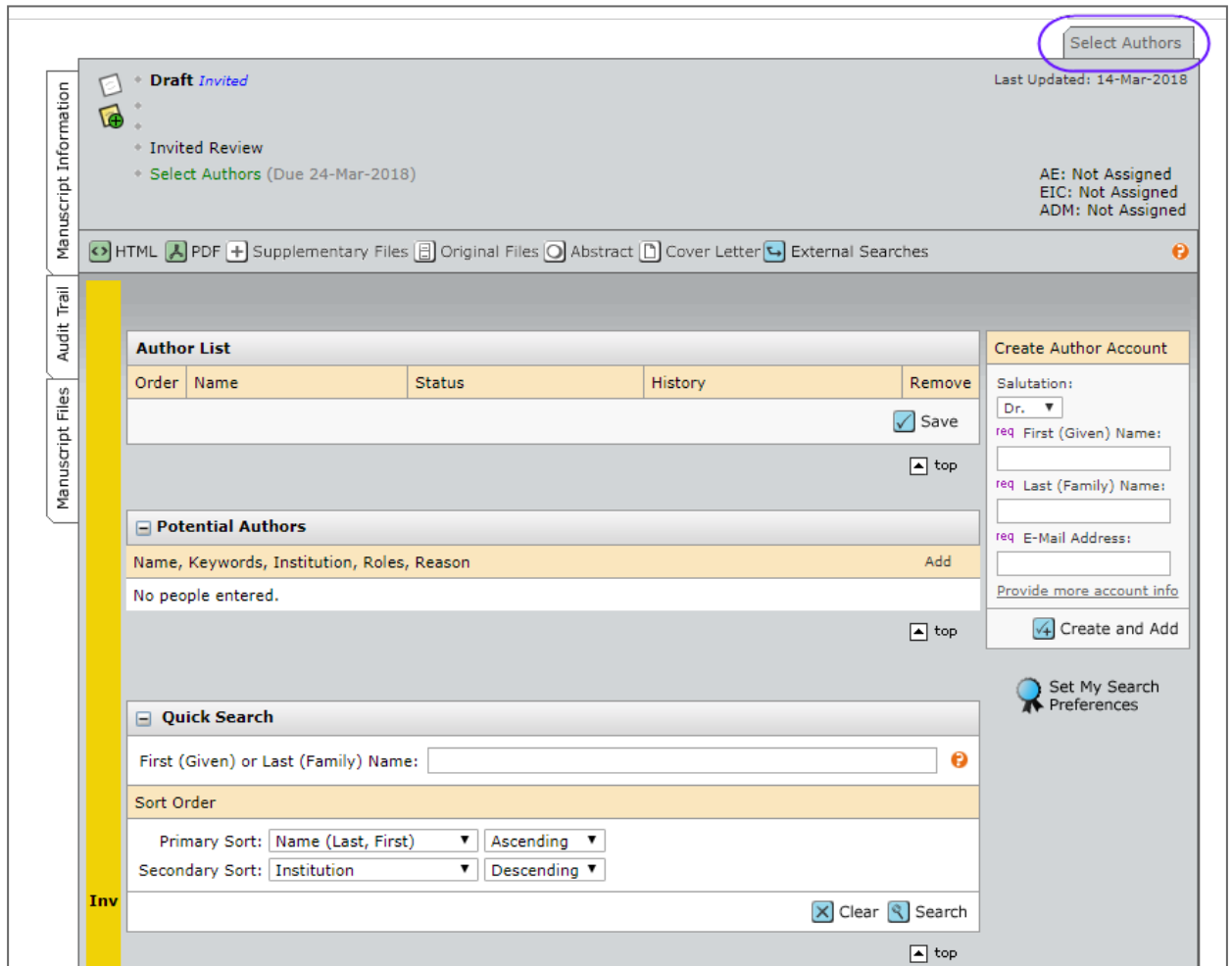
Use one of the search options to search the user database:

- Quick Search

- Related Papers Search

- Auto-Suggest

- Advanced Search

Or the Create Author Account option on the right-side of the screen. We recommend you always search the database for an author before creating a new account.

▶ Select an Author

104.   After you commit the stub, the Manuscript Details page displays the **Select Authors** tab.

105.   Search for an author.

    a. **Search for the Author by Name:** If you know the author you wish to invite, use either the Quick Search or Advanced Search to search for the author.

    b. **Search for the Author by Keywords:** If you would like to identify an author by topic or keyword, use the Related Papers Search or Auto-Suggest features to search for an author.

106.   Select the Author from **Search Results** by ticking the **Add** checkbox and clicking the **Add** button.

107.   If you could not find the author in the system, you may create an account for the author using the Create Author Account box on the right side of the screen.

- Enter **First Name**, **Last Name**, and **E-Mail Address**.

- Click the **Create and Add** button.

108.   Once selected, the Author appears in the **Author List**.

INVITE THE AUTHOR

The next step is to invite the author. This formally invites the Author via email and provides the Author a method to respond to the invitation.

▶ Invite the Author

109.   On the Author List, click the **Invite** button.

110.   An invitation email displays.

111. The invitation email is editable before sending, so you can add additional information for the Author if needed. You may create more than one invitation letter template if you wish.

112. The invitation can be configured to include the automatic response links of Agreed and Decline. (Refer to the Email Templates user guide for details.)

113. You may attach files if needed. Any files attached when you created the stub will be included automatically.

114. Click **Save and Send** to send the invitation email.

115. The email is sent to the Author.

From:	onbehalfof+gwen.baker+test.demo@manuscriptcentral.com on behalf of gwen.baker@test.demo	Sent:	Fri 7/12/2013 1:25
To:	Cooney, Jane (IP&Science)		
Cc:			
Subject:	FW: Invitation to Submit to the ScholarOne University Training Workflow 1		

Dear Dr. Author:

I would like to receive a manuscript entitled "" to be considered for publication in the ScholarOne University Training Workflow 1.

I invite you to submit this manuscript. Please let me know as soon as possible if you will be able to accept my invitation. If you are unable to submit at this time, I would appreciate you recommending another expert author. You may e-mail me with your reply or click the appropriate link at the bottom of the page to automatically register your reply with our online manuscript submission and review system.

Once you accept my invitation to submit this manuscript, you will be notified via e-mail about how to access Manuscript Central, our online manuscript submission and review system. You will then have access to the manuscript and instructions in your Author Center.

I realize that our solicited papers greatly contribute to the high standards of the Journal, and I thank you for your present and/or future participation.

Sincerely,
Gwen Baker
ScholarOne University Training Workflow 1 Editorial Office gwen.baker@test.demo

Agreed: http://mc.manuscriptcentral.com/s1u-wf1?URL_MASK=qS9RCnkbJrnb6dKBk7yT

Declined: http://mc.manuscriptcentral.com/s1u-wf1?URL_MASK=FNm5kscGZj5MTbTGbdxf

ASSIGN THE AUTHOR

The Author may accept or decline the invitation using the **Agreed** and **Declined** hyperlinks in the email. However, there may be times when you want to update the status manually. For example, an Author may verbally agree to submit a paper or may have already agreed offline before you created the stub in the system.

▶ **Assign the Author**

116.　　　Select **Assign Author** in the Invited Papers section of the Admin Lists. (If you are assigning an Author immediately after inviting the Author, you will already be at the correct screen and may skip this step.)

117.　　　The Invited Paper Stubs screen displays. Select **Assign Author** in the Take Action column.

118.   The Manuscript Details page displays. Select an option from the **Response** drop-down list.
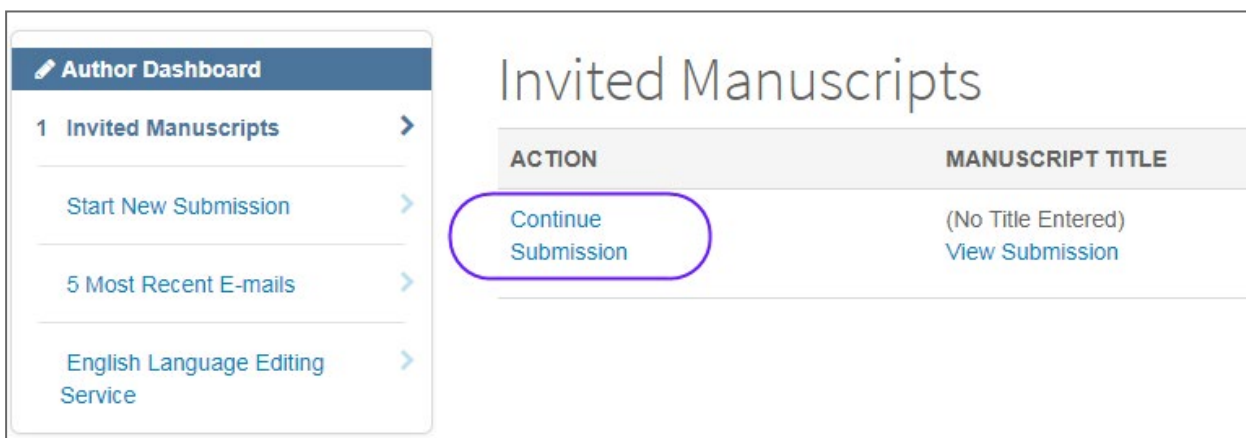
119.   Click the **Save** button.

120.   ScholarOne Manuscripts will send an email to the Author confirming that they have agreed to submit a paper. It will contain a link for them to access their Author Center on your site.

AUTHOR SUBMITS THE INVITED PAPER

For the Author to complete the invited paper, they will select **Invited Manuscripts.**
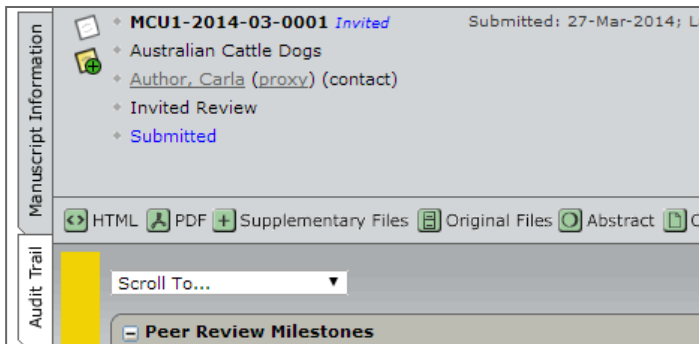
THE COMPLETED SUBMISSION

Once the author submits, the word Invited will appear after the manuscript ID number.

The yellow ribbon will remain after the invited paper is submitted.

DELETING AN INVITED PAPER

If the author does not submit the paper, it will still be in the queue of Awaiting Author Submission.

▶ Delete an Invited Paper

121. Select **Awaiting Author Submission** in the Invited Papers section of the Admin Lists.
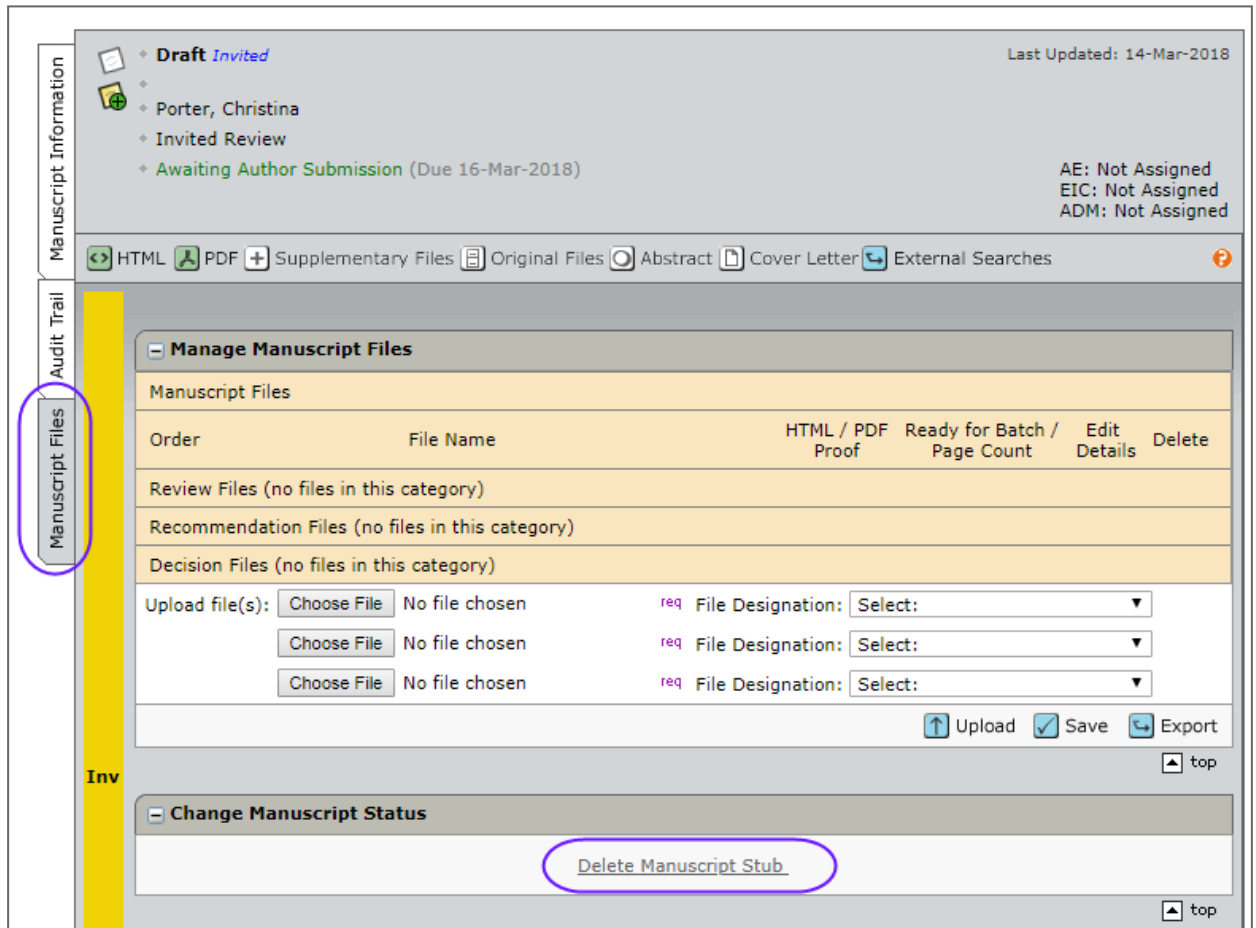
Invited Papers

GO Create a Manuscript Stub

7 Select Author

4 Invite Author

1 Assign Author

1 Awaiting Author Submission

122.   The Invited Paper Stubs screen displays. Select **View Manuscript Files** from the Take Action list.

Invited Paper Stubs				Stubs 1-1 of 1
Search Criteria: Status="Awaiting Author Submission"				
			Status: Awaiting Author Submission ▾	
Tracking Number Manuscript ID	Title / Author	Assigned Users	Status / Due Date	Take Action / Select All ☐
none	none	AE: Not Assigned EIC: Not Assigned ADM: Not Assigned	• Awaiting Author Submission (Due 16-Mar-2018)	Select... ▾
	🔍 Porter, Christina (proxy)		16-Mar-2018	Select... View Details View Manuscript Files View Audit Trail
⤵ Export to CSV ↺ Inactivate ✕ Delete				Stubs 1-1 of 1 Display 10 ▾ records per page

123.   The Manuscript Details screen displays. Select **the Manuscript Files** tab. Select **Delete Manuscript Stub** in the Change Manuscript Status section.

124.   Click **OK** to delete the manuscript stub.

UNUSUAL ACTIVITY DETECTION

Unsusual activity detection identifies unusual activity by users during submission and review. Journals will see a risk indicator on the manuscript header. The risk indicator is derived from using proprietary algorithms based on existing web traffic and server data such as when Reviewers are suggested by the Author and when Reviewers use a non-institutional email address.

Visibility to the use of and report from this feature is limited to the publisher, Editor role types, and Admin role types. The public, Authors, and Reviewers will not know it is in place unless you decide to announce its use by your organization.

UNUSUAL ACTIVITY INDICATORS

Standard Access (Editor roles by Default)

A red or yellow status indicator will appear on the manuscript header when unusual activity has been detected. Editor and Admin roles with standard access will see the indicator while users with full access will have a link to a report. By default, Editors will have standard access.

Example of High Risk Alert, shown on Manuscript Details

Example of Medium Risk Alert

Full Access (Admins by Default)

A red or yellow status indicator will appear on the manuscript header when unusual activity has been detected. Users with full access will see the indicator with a link to the report. By default, Admin roles will have full access.

Example of High Risk Alert

Example of Medium Risk Alert

CLEARING THE FLAGGED SUBMISSION

Once the activity report has been reviewed and a decision has been made, the flag may be cleared by a user with full access using the report page.

Clear This Submission?

☐ **I have reviewed this report and clear the submission to proceed and understand that this will be logged for future use.**

My Reason and Notes

🖨 Print   Clear Submission

Once it has been cleared, a message will appear at the top of the form:

✔ **Cleared on 14 AUG 2018 by Firstname Lastname**
Notes: We did research on the author and Reviewer yarrow ricebean rutabaga endive cauliflower sea lettuce kohlrabi amaranth water spinach avocado daikon napa cabbage asparagus winter purslane kale. Celery potato scallion desert raisin horseradish spinach carrot soko.

Also, the unusual activity indicators will turn green:

Standard Access view

This submission was cleared of unusual activity by Firstname Lastname on 14:00 ET 14 AUG 2018.
Please contact a person with full access (Typically an Admin) for more information. What is this?
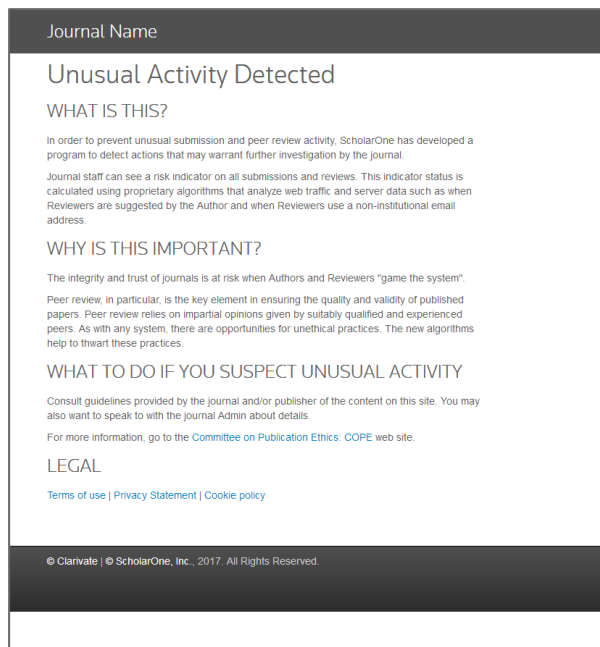
Full Access view

This submission was cleared of unusual activity by Firstname Lastname on 14:00 ET 14 AUG 2018. What is this?   📄 Report

SUBMISSION "WHAT IS THIS?" INFORMATIONAL POP-UP

All of the unusual activity indicators will have a link to the informational pop-up via the hyperlink, "What is this?" This pop-up will provide the following:

- Information and explanation of the feature

- Why it is important to the industry

- Next steps for the journal when they suspect unusual activity

- Legal disclosures

> ### Journal Name
>
> ## Unusual Activity Detected
>
> **WHAT IS THIS?**
>
> In order to prevent unusual submission and peer review activity, ScholarOne has developed a program to detect actions that may warrant further investigation by the journal.
>
> Journal staff can see a risk indicator on all submissions and reviews. This indicator status is calculated using proprietary algorithms that analyze web traffic and server data such as when Reviewers are suggested by the Author and when Reviewers use a non-institutional email address.
>
> **WHY IS THIS IMPORTANT?**
>
> The integrity and trust of journals is at risk when Authors and Reviewers "game the system".
>
> Peer review, in particular, is the key element in ensuring the quality and validity of published papers. Peer review relies on impartial opinions given by suitably qualified and experienced peers. As with any system, there are opportunities for unethical practices. The new algorithms help to thwart these practices.
>
> **WHAT TO DO IF YOU SUSPECT UNUSUAL ACTIVITY**
>
> Consult guidelines provided by the journal and/or publisher of the content on this site. You may also want to speak to with the journal Admin about details.
>
> For more information, go to the Committee on Publication Ethics. COPE web site.
>
> **LEGAL**
>
> Terms of use | Privacy Statement | Cookie policy
>
> © Clarivate | © ScholarOne, Inc., 2017. All Rights Reserved.
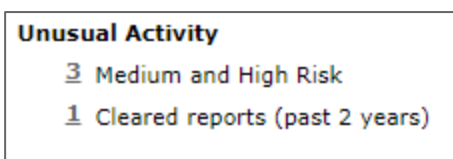
ADMIN DASHBOARD

Administrators have the ability to see all of the currently flagged submissions in a queue called Unusual Activity. There is also a queue that will show all cleared reports in the past 2 years.

> **Unusual Activity**
> 3   Medium and High Risk
> 1   Cleared reports (past 2 years)

REPORT

Users with full access will be able to view a popup with a detailed report of the actions which elevated the risk level of the submission.

Journal Name

✔ **Cleared on 14 AUG 2018 by Firstname Lastname**
Notes: We did research on the author and Reviewer yarrow ricebean rutabaga endive cauliflower sea lettuce kohlrabi amaranth water spinach avocado daikon napa cabbage asparagus winter purslane kale. Celery potato scallion desert raisin horseradish spinach carrot soko.

Unusual Activity Report

The following submission should be evaluated by the journal staff due to unusual activity.

Report Date
HH:MM MMM DD YYYY
Manuscript ID
ABC-004563-2018
Title
"Powered application passive inertia fuzzy development fragmentation element plasma transistorized embedded dynamic bypass engineered inertia super with reverberated microscopic key developer internet equipment timer signal services sampling record scan proxy dynamic bypass engineered inertia super with reverberated microscopic key developer internet equipment timer signal services sampling record scan proxy"

🖨 Print

Review turnaround time was unusally short ❓

1. Reviewer, Firstname Lastname (0 days, 2 hours)
2. Reviewer, Firstname Lastname (1 days, 3 hours)
3. Reviewer, Firstname Lastname (2 days, 8 hours)
4. Reviewer, Firstname Lastnamee (1 days, 5 hours)

TRANSFER OF MANUSCRIPTS BETWEEN JOURNALS

Manuscripts are often submitted to one journal when they are better suited for another journal. To address this, your site and one or more partnering journal sites can be configured by ScholarOne to transfer manuscripts.

Transfers can be made through a manual process or through a Reject with Transfer decision type.

Transfers are recorded in the manuscript's Audit Trail on both the sending and receiving sites.
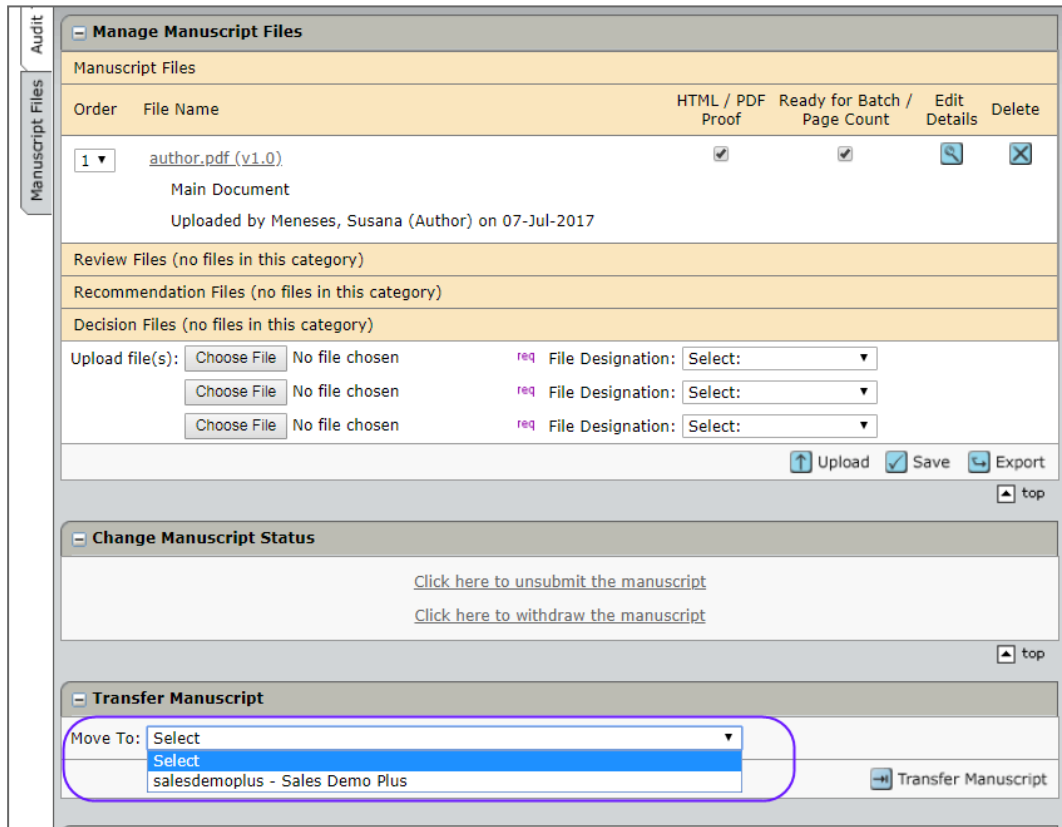
MANUAL MANUSCRIPT TRANSFER

The manual transfer functionality allows key journal users to transfer a manuscript from their journal site to another journal site to which it's better suited. The transfer is easily initiated from the **Manuscript Files** page. Once the transfer is complete, the manuscript on the sending site will no longer be in the workflow. The receiving site will show the manuscript in an **Unsubmitted Transferred Manuscripts** queue on the Admin Dashboard. The Admin on the receiving site will check the manuscript in, and then the manuscript will enter the first task in the Submitted Workflow.
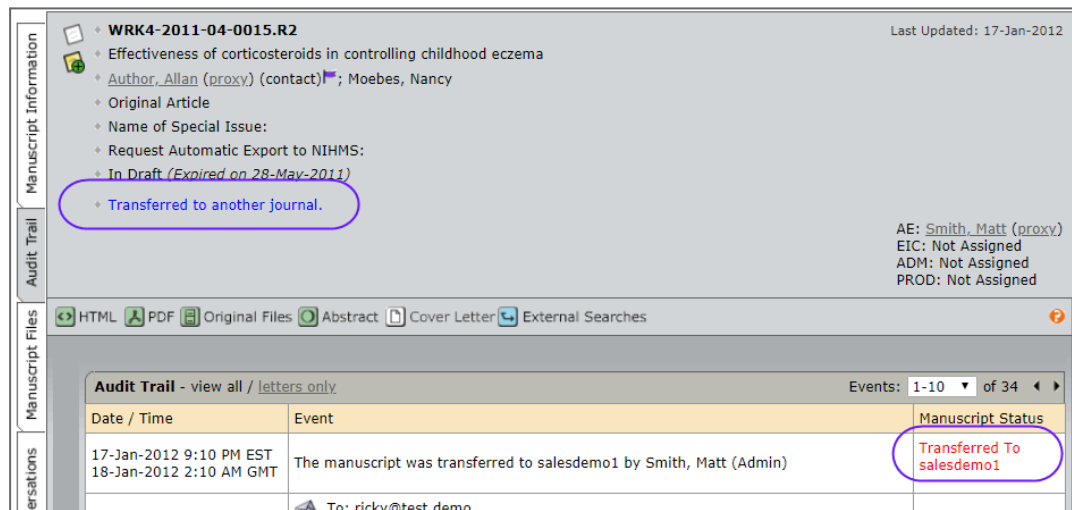
Manual Transfer

▶ Manually Transfer the Manuscript

125. From the **Manuscript Files** tab of the manuscript to be transferred, locate the **Transfer Manuscript** section.

126. In the **Move To** field, select a journal from the dropdown list

127. Click the **Transfer Manuscript** button.

128. Optionally, click the **Audit Trail** tab to confirm the transfer. It will be reflected in the header and the Manuscript Status.

Receipt of Manually Transferred Manuscript

▶ Receipt of Manuscript in the Receiving Journal

129.   Once transferred, the manuscript will appear in the **Manuscripts Transferred In** queue under the **Unsubmitted Transferred Manuscripts** heading in the receiving journal's Admin Center.

130.   Click the **Manuscripts Transferred In** link then **View Details** to access the file and go to the Manuscript Details screen.

131.   Check for an error message at the bottom of the **Author-Supplied Data** section.
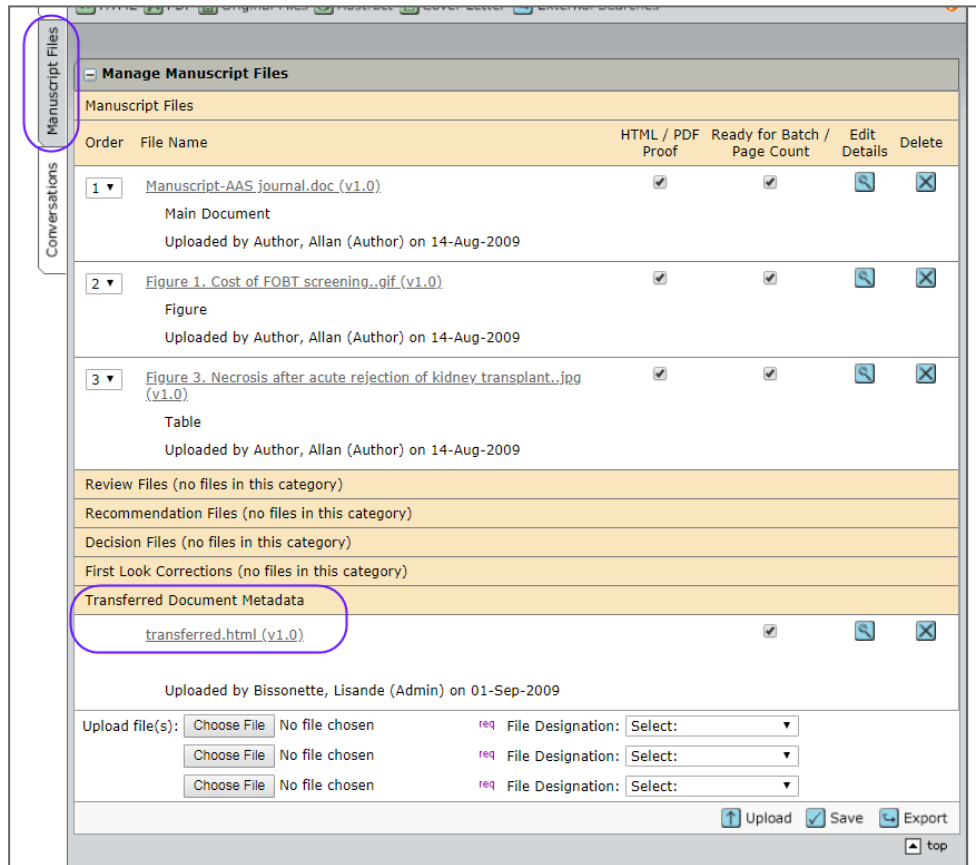
- **This document has errors**: Errors occur if the required fields during the original submission are incomplete, or the required fields in the sending and receiving journals are not an exact match. The Author-supplied data must be edited (see below).

- **This document may be submitted**: There are no errors.

132. Click the **This document has errors** message to see a screen listing the errors.

133. Click **OK**.

134. Correct the errors or ask the Author to do so.

- **The Admin corrects the errors**: Click the **Edit this Information** button. Make necessary changes then click the **Save & Check for Errors** button.

A resource for the Admin to make appropriate changes can be found on the **Manuscript Files tab**. In the Managed Manuscript Files section, you will see the Transferred Document Metadata. Click the link to view a listing of the manuscript metadata exactly as it was entered on the sending site.

- **The Author corrects the errors:** The Admin must unsubmit the manuscript so it returns to the Author Center and the Author may then update and resubmit the manuscript.

135. Once all fields have been corrected, the Admin will click the **This document can be submitted** link at the bottom of the Author Supplied Data section.

136. Click **OK** to place the manuscript in the first task in the journal workflow, typically the Complete Admin Checklist task.

Note: The sending journal can still find the manuscript for historical purposes by selecting the **Transferred to Another Journal** option in the **Workflow/Status** area of the **Advanced Manuscript** search. Once a manuscript is transferred out of a journal, the manuscript details are inaccessible.

E-mail Templates for Manual Manuscript Transfer

To support the manual transfer functionality, a **System E-Mail** called **Transfer Manuscript is received** will need to be made active for the site.

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The email tags that can be used for the email are:

- ##TARGET_JOURNAL## (the receiving journal)

- ##TARGET_JOURNAL_ADMIN_CONTACT_EMAIL## (the e-mail address of the Admin Center Contact for the receiving journal)

- ##TARGET_JOURNAL_ADMIN_CONTACT_NAME## (the full name of the Admin Center Contact for the receiving journal).

Additionally, there is an email template that may be configured to send a reminder if the author does not respond to the transfer request within a configured time. It is located in **Misc. Event-Driven E-Mails** and is named **Request to transfer your manuscript**.

> **Tip:** You may want to configure two emails, one to go to the receiving site's admin as a notification, and one to go to the Author letting him/her know about the transfer. It is a good idea to notify the Author once the manuscript has been transferred and checked in so the Author knows his/her manuscript's status and the new manuscript ID.

TRANSFER BY DECISION

The **Reject with Transfer** decision type allows the sending journal to render the Reject with Transfer decision and commit the transfer at the same time. This decision type will be recorded as a hard reject decision where applicable in the application, and is available in any place a traditional Reject decision can be made, including the Admin Checklist.

Selecting a Reject with Transfer decision allows the user to select the journal they'd like to transfer the paper to. Rendering the decision automatically records both the Reject decision and transfers the manuscript into the selected site. There is an option for the Author to approve the transfer. The manuscript and associated metadata are transferred to the Author or Admin on the new journal. An example transfer process is depicted below.
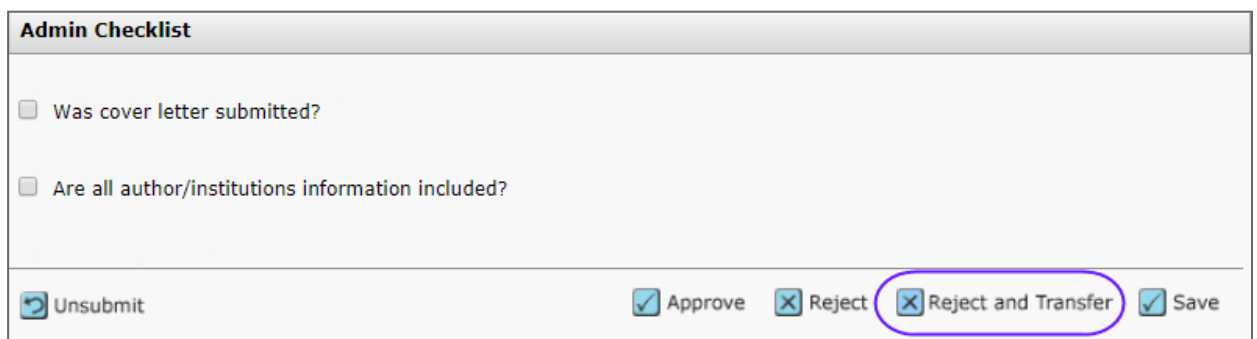
If configured, journals may also utilize the Transfer Choice for Authors functionality. This allows journals to give the author a choice of multiple journals to choose from. In this case, may select one of the offered transfer options or decline the transfer. Declining the transfer renders the reject decision.

Making the Reject with Transfer Decision from the Admin Checklist

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The Admin can make the Reject with Transfer decision directly from the Admin Checklist. Do not use this method if your site uses the optional feature for the Author to approve before a transfer. (See below for details.)

▶ **Reject and Transfer from the Admin Checklist**

137.   Access the **Manuscript Details** page for the manuscript to reject and transfer.

138.   From the Admin Checklist you can click the **Reject and Transfer** button.
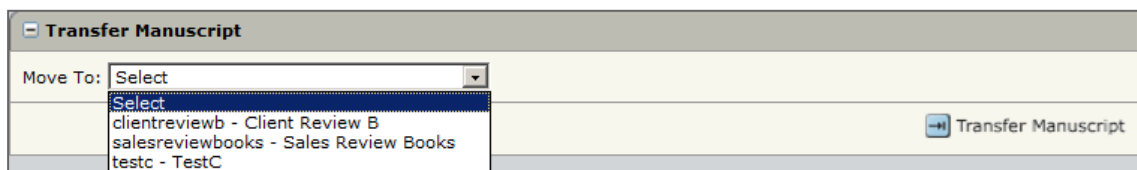
139.   Click the **OK** button to confirm.

140.   In the **Move To** field, select a journal to transfer the manuscript to.
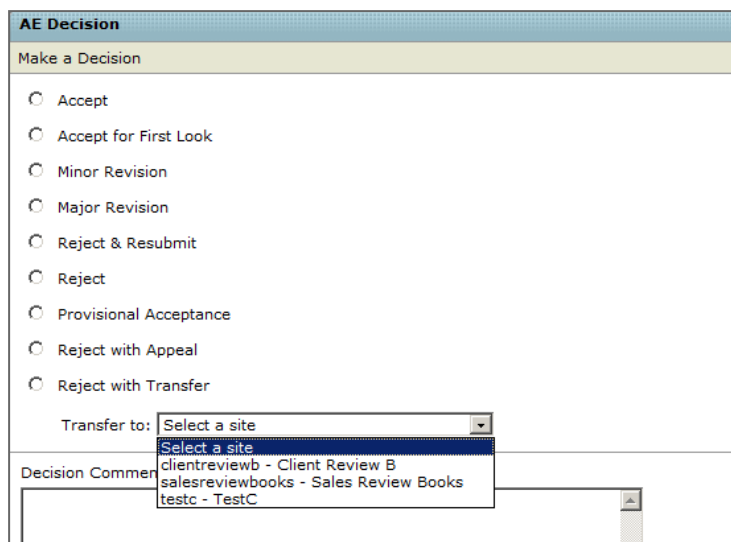
Making the Reject with Transfer Final Decision by the Editor

▶ **Reject and Transfer as a Final Decision**

141.   Access the **Manuscript Details** page for the manuscript to reject and transfer.

142.   Select the decision to **Reject with Transfer.**

143.   Select the journal site you would like to transfer the manuscript to

   a. Single journal option:

   b. Transfer Choice for Authors option:
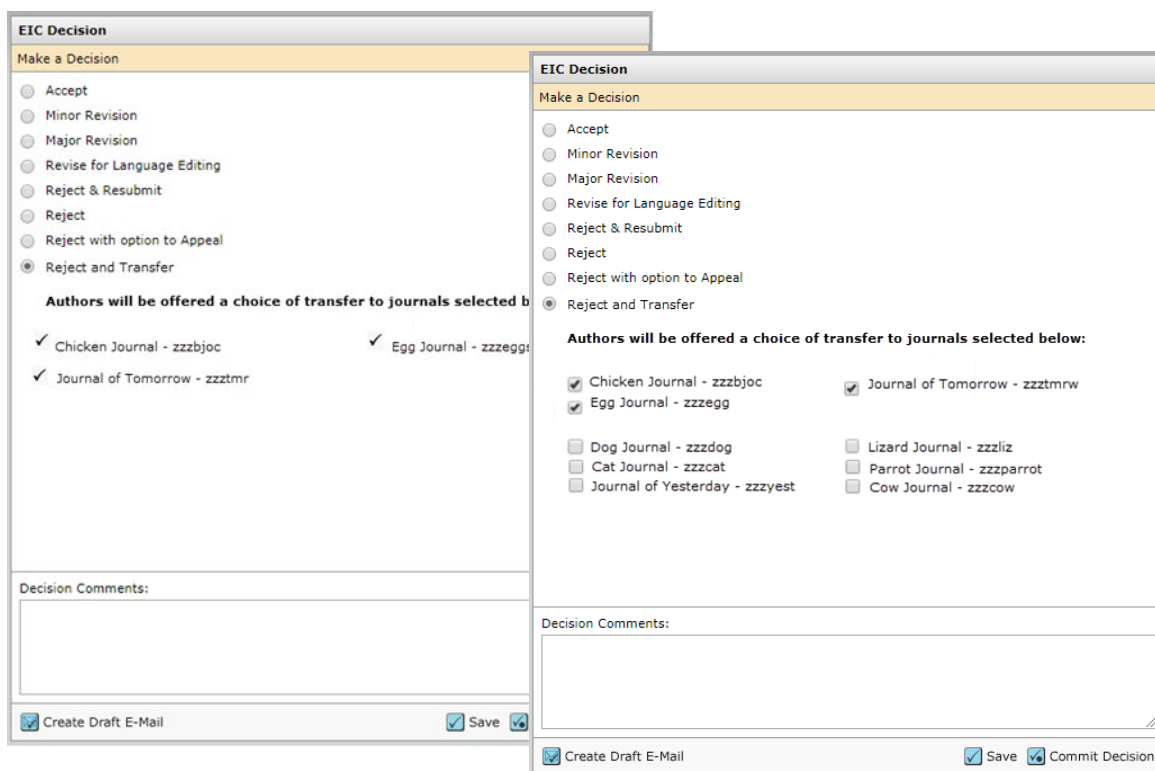
144. Click the **Commit Decision** button.
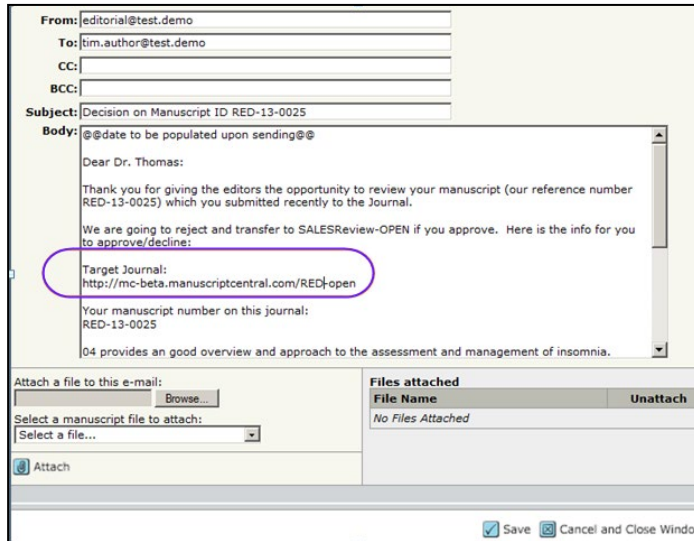
Author Approval Prior to Transfer

Many journals prefer to obtain author permission before transferring their manuscript prior to actually transferring it. To support this process, an Approval step can be added. Once a Reject with Transfer decision is rendered on the sending site, the submitting author will be able to approve or reject the transfer request either from their Author Center or an e-mail.
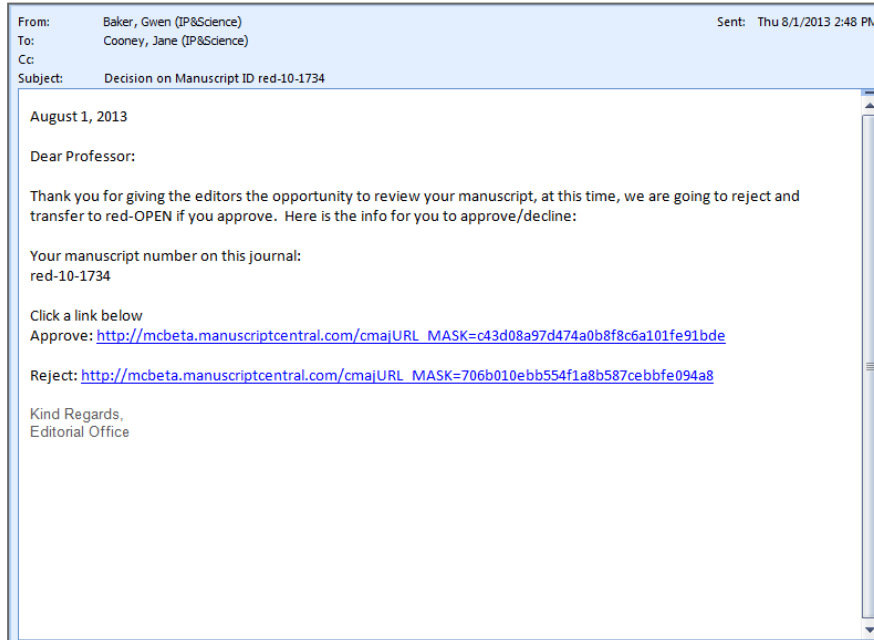
> **TIP:** There are two "deep link" email tags titled ##APPROVAL_TRANSFER_AUTHOR## and ##REJECT_TRANSFER_AUTHOR## that, when clicked, will register the Author's approval or rejection of the transfer.

▶ Author Approval Prior to Transfer – Via E-Mail

145. If configured, an e-mail template will display. This email will be sent to the Author with links to the target journal, as well as links to directly accept or reject from the email.

146. Click **Save** to send.

Note: If the author has a choice of journals, the email will contain a link which opens a page offering the choices. The author does not need to log in, but can choose a journal or reject the transfer from that screen.

---

147. The author clicks either the **Approve** or **Reject** links.

▶ **Author Approval Prior to Transfer – Via the Author Center**

148. The Author selects the **Manuscripts Awaiting Approval to Transfer** queue in the Author Center.

    a. Single journal option: Click **Approve** or **Reject**.

    b. Transfer Choice for Authors options: Click **View Transfer Options** and choose a destination. Declining the transfer renders a reject decision.

Receipt of Transfer by Decision Manuscript

Once a manuscript is transferred into a receiving journal, it may be placed directly in the **Manuscripts Transferred In** queue in the Administrator Center.

Unsubmitted Transferred Manuscripts

   1 Manuscripts Transferred In

If the site receiving the transferred manuscript needs to await author approval, the admin will see the manuscript in a queue awaiting author approval.

Transferred and Pre-Transferred Manuscripts with Author

   1 Manuscripts Awaiting Author Approval to Transfer

   0 Transferred Manuscripts With Author

Note: If there are custom questions that need to be completed or additional files required on the receiving site, the administrator must unsubmit the manuscript to return it to the author.

In order to expedite processing of transferred manuscripts, journals have the ability to configure their sites so that manuscripts can be automatically sent to the author on the receiving site. The **Transferred Unsubmitted Manuscripts** queue houses these transferred manuscripts in the Author Center.
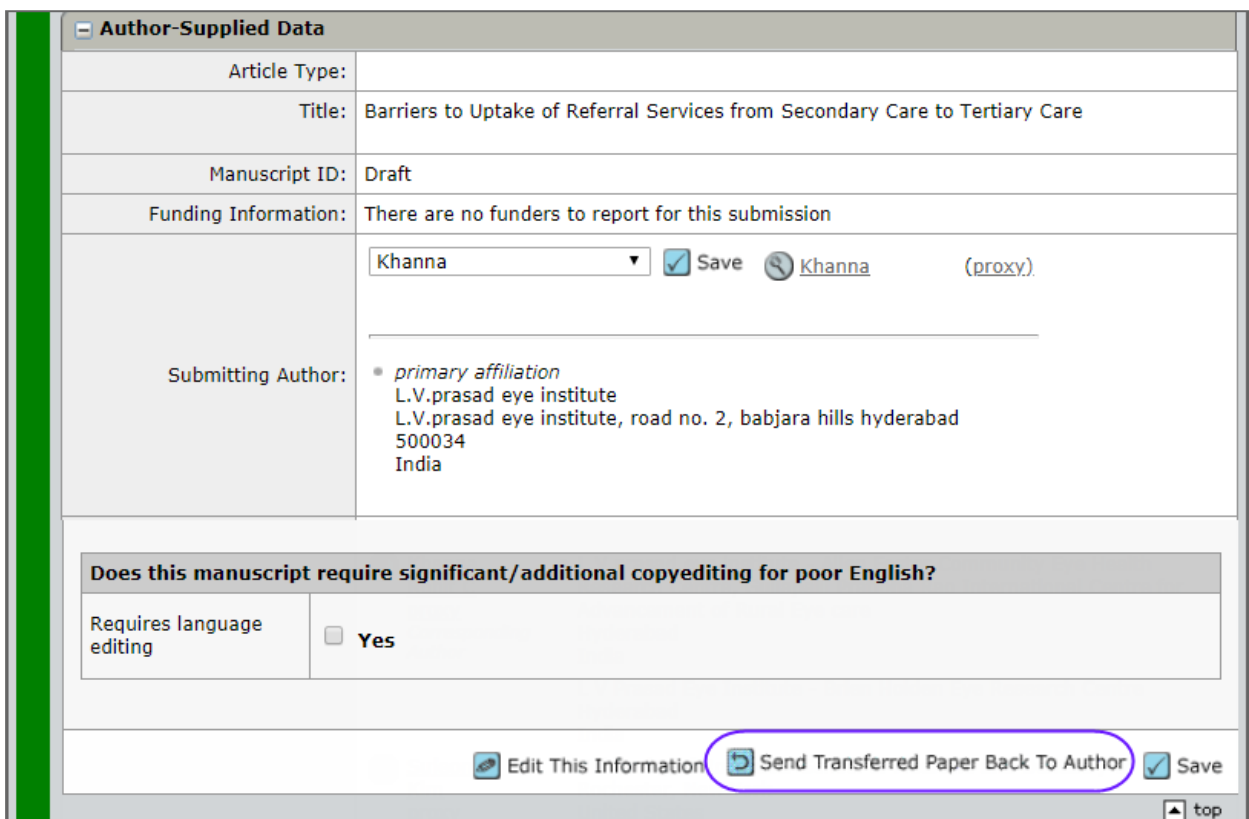
If the transferred paper is present in the Admin Center, and the Admin wishes to send it back to the Author, clicking the **Send Transferred Paper Back to Author** button will move the manuscript directly to the **Transferred Unsubmitted Manuscripts** in the Author Center.

DISPLAY OF TRANSFER DETAILS ON BOTH THE SENDING AND RECEIVING SITES

When a manuscript is transferred from one journal to another, it is important that critical data be displayed on both the sending and the receiving sites. Access to this data helps prevent possible delay in the peer review process and assists journal staff in data collection and reporting. Information is displayed in the following areas:

- **Version History:** The receiving site can view details about a transferred manuscript in the Version History section on the Manuscript Details page. A link to the Review Details of the transferred manuscript is also available (if configured) on the Audit Trail tab.

- **Manuscript Notes:** When a manuscript is transferred, the notes associated with the manuscript prior to transfer are transferred to the receiving site.

- **Person Details:** When a manuscript is transferred, information about the transfer is displayed in the History column of the Person Details pop-up screen.

ADMIN TOOLS MENU FUNCTIONS

USER ADMINISTRATION

User Search

Simple User Search

Use the Simple Search function in the upper right corner to quickly search for users.
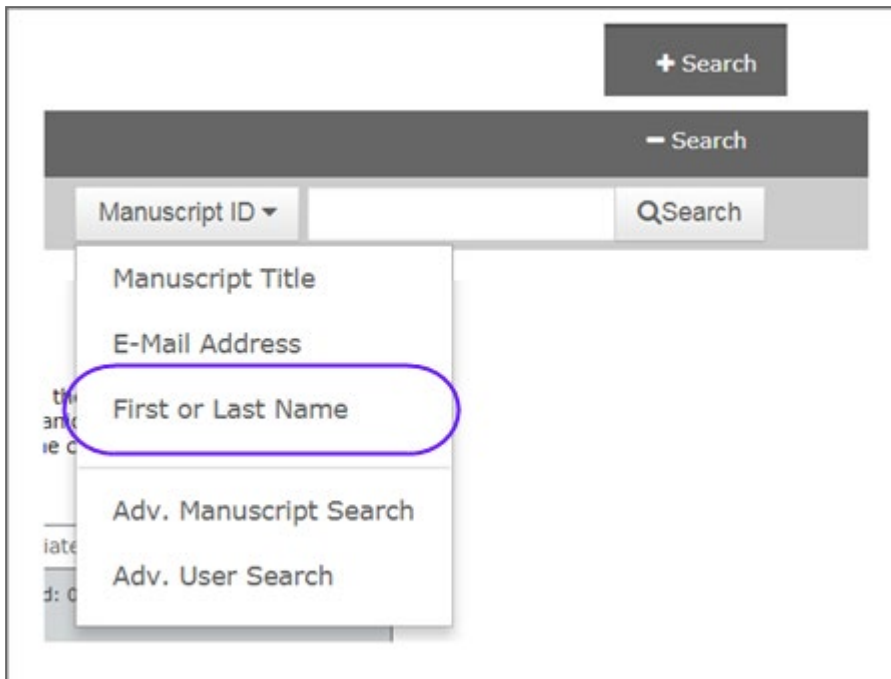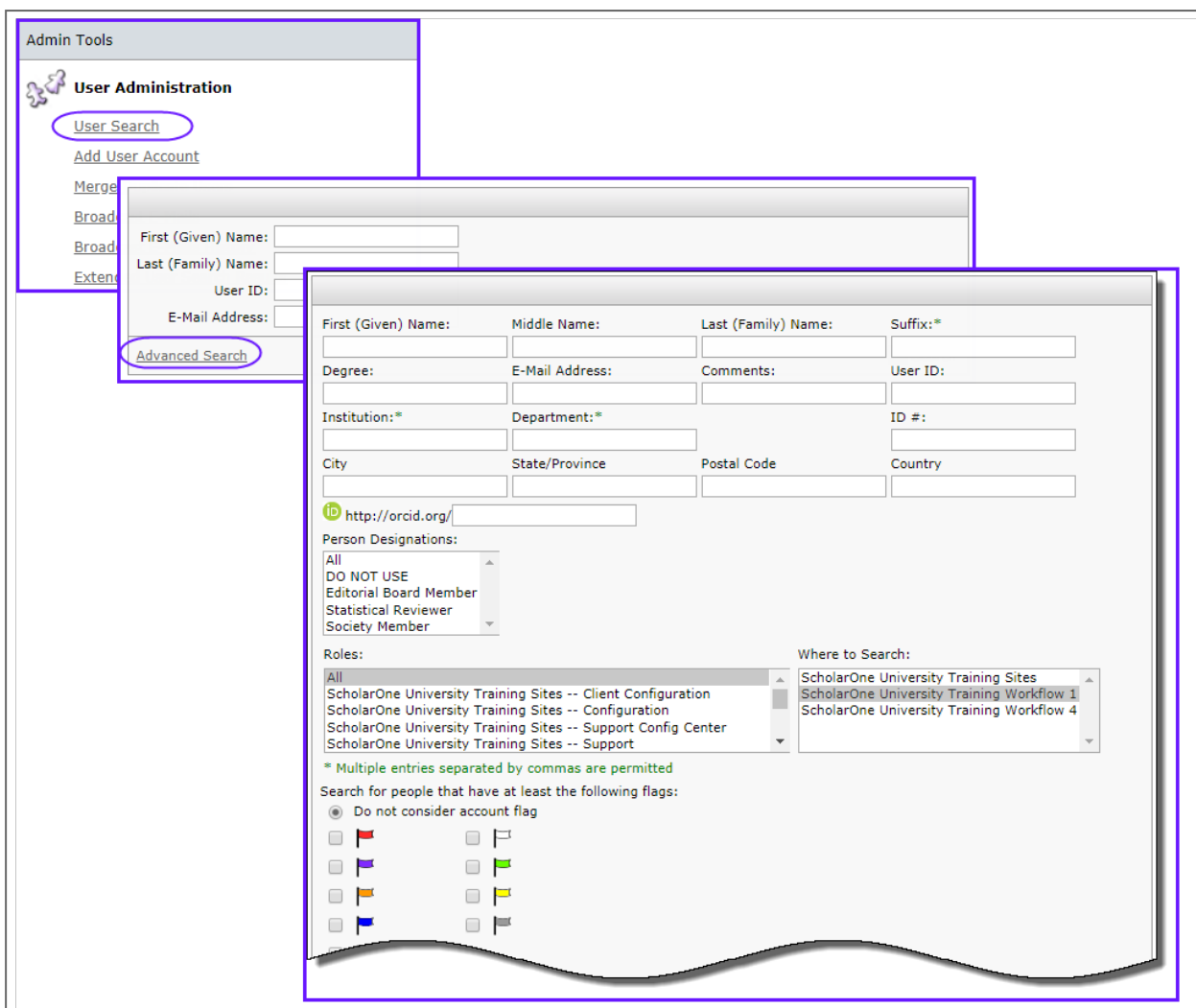
▶ **Use the Simple Search**

149.   Enter the name text in the box.

150.   Select an appropriate option from the drop-down list.

151.   Click the **Search** button.

Quick and Advanced User Search

As the Journal Administrator, you have significant user search capabilities. User search can find any system user including Authors, Reviewers, and Editors. The User Search link is in the **Admin Tools**, **User Administration** area of your dashboard. The Quick Search page allows you to search for a user based on their First Name, Last Name, User ID, and/or Email Address. Advanced Search provides more search options for such as keywords and flags. You may use an asterisk (*) as a wildcard in your search.

▶ **Use the Quick Search**

152.   Select **User Search** from the Admin Tools.

153.   Enter the search criteria.

154.   Click **Search**.

155.   The system displays any user that matches the criteria.

▶ **Use the Advanced Search**

156.   Select **User Search** from the Admin Tools.

157.   Click the **Advanced Search** link.

158.   Enter the search criteria in any of the fields or combinations of fields.

159.   Click **Search**.

160.   The system displays any user that matches the criteria.

Search Results

Regardless of how you searched, the Search Results Screen displays any user who meets the search criteria. For each user found, you will see the Name, User ID / E-Mail address and Journals and Roles.

Search Results
- Click the "proxy" link under a user's name to proxy as that user.
- Select the "Details" icon to view the user's account information. You can then send their username/password information, view their information via the PubMed database, or send the user an e-mail.
- Select the "Edit" icon edit the user's account information and change their permissions.

Search results - New Search - Modify Search - Change Sort				People 1-1 of 1
Search Criteria: First (Given) Name = "jane"				
Name	User ID / E-Mail	Journals & Roles	Details	Edit
Cooney, Jane	janecooney / jane.cooney@thomsonreuters.com proxy ☐ mark for merge send account info	Last Modified: 19-Apr-2013 ScholarOne University Training Workflow 1 [Last in: 22-Apr-2013 10:21 AM] Author Reviewer	🔍	✏️
⬅ New Search 🔍 Modify Search		Ⅰ Go To Merge ↪ Export to CSV		People 1-1 of 1

You can perform some basic functions from the results screen. Examples include:

- Click the **Name** link to create an email to the user.

- Click the **Proxy** link in the User ID/ E-Mail section to proxy in to the system as the user.

- Click the **Send Account Info** link to send the user their User ID and Password information.

- Click **Details** to view more user details. You may re-send emails from the Details screen. You may remove a person from the system in Details>Administration Options.

Administration Options:

Click here to send person login information.

Remove this person (GDPR)
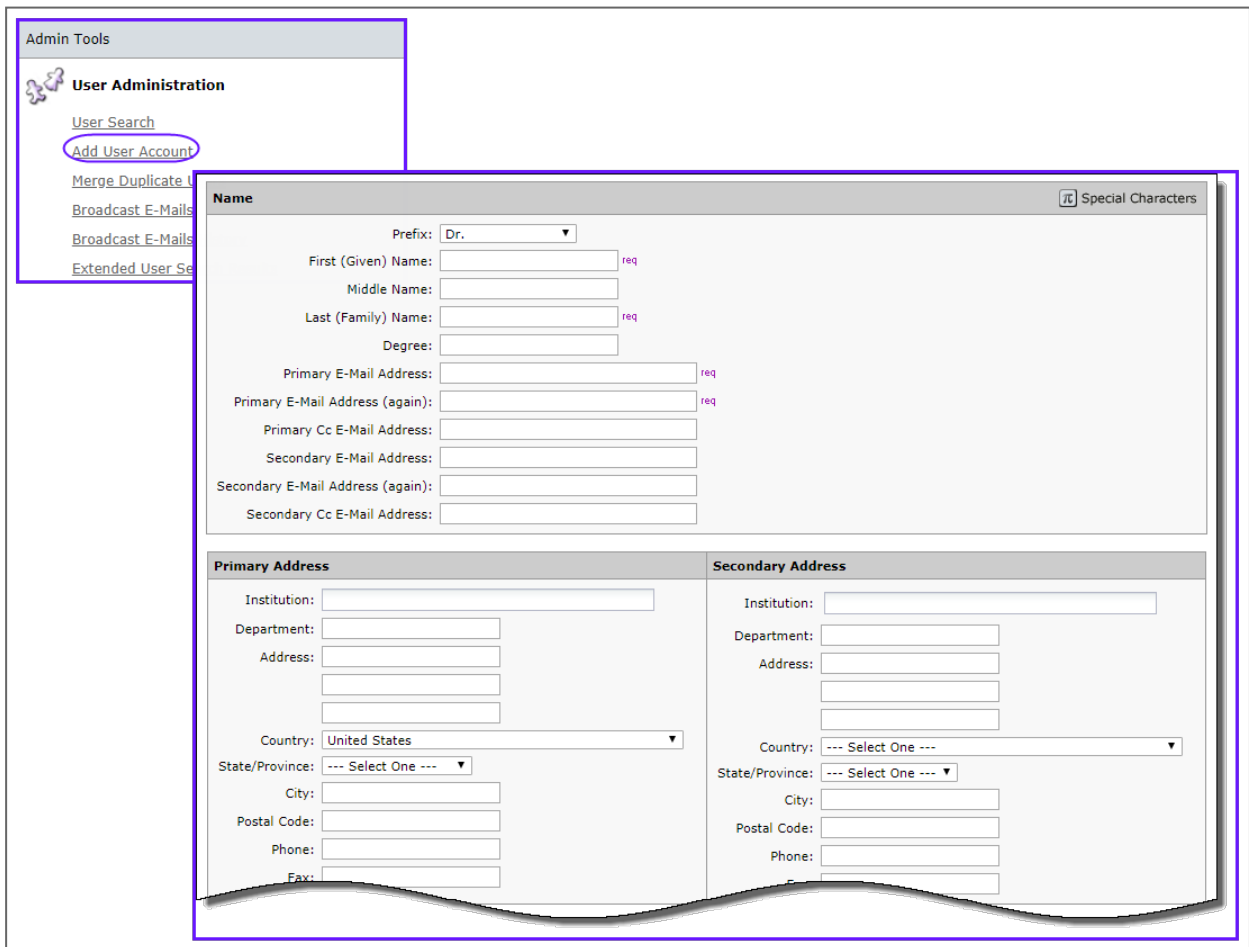
- Click **Edit** to update user account information.

- Click **New Search** to return to the search criteria screen and enter new criteria.

- Click **Modify Search** to return to the search criteria screen with you existing criteria pre-filled.

- **Go To Merge** allows merging user accounts. This function will be described later in this manual.

- **Export to CSV** exports search results to a file that can be accessed in spreadsheets and other programs.

Adding and Managing User Accounts

One of the tasks of the Journal Administrator is to create user accounts. Adding a new user is a process accessed from the Admin Tools section of the dashboard.

Adding User Accounts

Tip: Always search for the user before adding a new user to avoid creating duplicate accounts.

▶ **Add User Account**

In each of the following sections, complete the fields listed below.

161.   **Name** (Required for Account Setup)

Enter name and email address information.

162.   **Primary Address** (Required for Account Setup)

Enter primary and (optional) secondary address information.

163.   **User ID** (Required for Account Setup)

The User ID defaults to the primary email address. An email with a temporary password is sent to the user when you finish adding the account.

Note: The temporary password allows users to log in and set their own password (they can also change their User ID). Our best practice is to avoid sending permanent passwords via email.

164.   **Keywords** (Optional, may be required by your journal)

If your journal uses keywords to further define a user, add those keywords here.

If the list is hierarchical or allows for multiple selections, highlight a word (or multiple words) and click the **Add** button.

If keywords are configured as a dropdown list, select from the list. If not, you may enter keyword text.

165.   **Unavailable Dates and Email Exemptions** *(Optional)*

You can enter dates that a user is not available for assignments or contact. You can further designate what happens to any task-related email reminders during the user's absence.

Enter unavailable dates in mm/dd/yyyy format or click to select from a calendar. Your journal may also display a field for entering the reason for unavailability.

Next, select a radio button for email activity during the user's absence. The three choices are:

- Any reminder emails will still sent by the system - default

- No reminder emails will be sent

- Only email reminders for the role of reviewer will not be sent

If choosing one of the two exemptions, you have the option to enter exemption start and end dates that are different than the unavailable dates (e.g., start sending reviewer reminder emails three days before the unavailable end date).

166. **Person Designations** *(Optional)*

Your journal may include this configured section. Person designations flag users as specialized, e.g., Editorial Board Member, and may be useful when searching for reviewers.

Person Designations	
Select the person designations for this user:	
☐ Do Not Use (DNU)	☐ Editorial Board Member (EBM)
☐ Statistical Reviewer (STAT)	☐ Society Member (SOM)
Comments	

167. **Comments** (Optional)

Enter comments as appropriate. These comments are visible only to the Admin, Editor-in-Chief, and Associate Editor roles.

Comments

168. **Signature** (Optional)

Users can enter a signature as part of their user profile. Your journal can then choose to use that signature by entering a specific Signature e-mail tag in templates.

Signature. The journal can choose to use the text you enter in this field in e-mail correspondence.

169. **Attach File(s)** *(Optional)*

Attach files as needed by browsing to the file and clicking the **Attach** button. Attachments can be managed from the right side of the section. The journal may have specific requests or you may include documents you deem relevant such as a Curriculum Vitae. This feature may not be configured on your site.

Please do NOT upload your manuscript in this area. Once you have finished creating your account, you may enter your Author Center to submit a new manuscript.

	Files attached
Browse...	
📎 Attach	*No files have been uploaded.*

Note: Do not upload manuscripts in this area. Manuscripts are uploaded through the Author Center's Submit a New Manuscript function.

170. **Roles & Permissions** (Required for Account Setup)

In the final step, set user roles and permissions.

Note: The Admin may assign any role to a user except the Administrator role. This role may only be added or modified by ScholarOne Customer Support.

Roles & Permissions

Site Name	Member Status	Roles	Permissions	Edit
ScholarOne University Training Sites	Active Member		Default	✏️
ScholarOne University Training Workflow 1	Active Member	AU, REV, AE, EIC, ADM, PROD	Support	✏️
ScholarOne University Training Workflow 4	Active Member	AU, REV, AE, ADM, EIC, PROD	Support	✏️

For each of the sites listed, click the **Edit** button to edit the default roles and permissions. The user Permissions & Roles dialog box displays.

Edit roles and permissions by selecting choices from the configured dropdown lists and using the checkboxes. You can give a user any combination of roles by selecting the checkbox for multiple role names.

- **Member Status on [Site Name]**: Select from the drop-down list whether the person is active, inactive or staff.

- **Permissions on [Site Name]**: Select Default or Admin permissions. Default should be used for all roles other than the Admin role

- **Reviewer Status**: Indicate whether the user is eligible to review manuscripts, see the Excluding Reviewers section for more details

- **Role Checkbox**: Select a checkbox to grant a role to a user

  Note: Once a user has been assigned a role, you cannot deselect the checkbox next to the role. See Inactivating User Roles for details.

- **Start Date**: Enter the date the role will become active for the user

- **Soft End Date**: A soft end date is used when a user will be ending a role but has existing work to complete. For example, enter the date an Associate Editor will no longer be accepting new assignments. The user will still have access to complete existing assignments.

- **Hard End Date**: Enter the date the user will no longer have access to this role.

- Click the **Save** button at the bottom of the dialog box.

171.	To save and create the account, click the **Save** button at the bottom of the Add User screen.

Editing a User Account

You can edit a user's account to update or change any of the account information.

First, perform a user search in order to display their account. Click the **Edit** button on Search Results to view account screens. Move through the editable pages and click **Save** when you have completed your changes.

User may also edit their own account. See the Account Owner Modify Account section below.

Inactivating User Roles

Use the Soft End Date and Hard End Date fields to inactivate a user's role. You cannot remove a user role by deselecting the checkbox next to the role.

Instead, use the Start Date and Soft End Date and Hard End Date fields to inactivate the role by calendar date. When a Soft End Date is entered for a role, the user will have the privileges of that role only for papers they were already working on, but will not be able to be assigned any new papers under that role. This function is particularly useful for editors who will be leaving their role, but, need to complete work on manuscripts assigned during their tenure. When the Hard End Date passes, the user will no longer have privileges for that role.

If a journal is using the feature to automatically assign the editorial staff member who worked on a manuscript to later revisions, those revisions may be automatically assigned to them during the period between the Soft End Date and Hard End Date, even though they would not otherwise receive new assignments during that period.

Account Owner Edit Account

A useful feature is the user's ability to edit their own account. Please encourage your users to use the Edit Account tab to update their contact information.
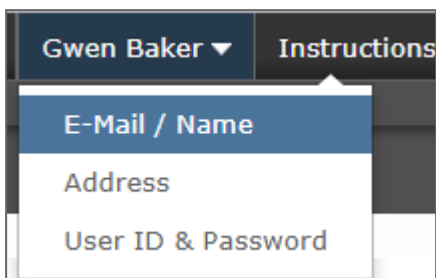
The Edit Account link displays on all Manuscript pages after log in. Users do not have access to change roles & permissions. Otherwise, they can change all information including their User ID (which they will want to do if their User ID is an old email address) and password. The User ID does not have to be their email address.

Also, please remind users that they must click the **Finish** button in order for their changes to be saved.

Excluding Reviewers

There are a variety of reasons why a journal may wish to have a reviewer in the system but to exclude them from selection in the peer review process. You can designate a Reviewer as "Excluded" on their User Permissions & Roles page.

When you designate a Reviewer Status of Excluded:

- That reviewer can still to log in and access their Reviewer Center.
- Their name does not appear in a selection dropdown list of reviewers.
- If an Editor or Admin tries to create an account for an excluded reviewer, they are notified that this person already exists in the system and is not eligible to review the manuscript.

Note: Reviewers marked as 'excluded' are not provided with any indication of this setting.

Account Badges

Account Badging functionality allows journals/publishers to create custom badges within the system to assign to user accounts. Similar to account flags, these badges can mark users accounts for any number of practical reasons. Badges serve as an intuitive visual indicator of important account characteristics.

Badges may be set on the Edit User screen.
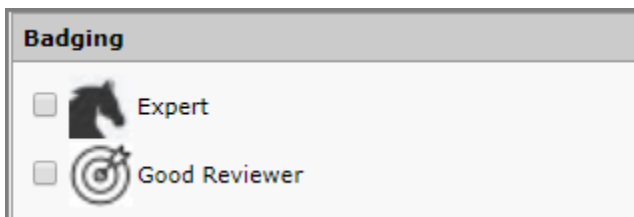
Badges may also be set in any location you can view or edit user account data. For example, when viewing the author information for a manuscript.

Badges may be used by Associate Editor roles to search for reviewers in the Select Reviewers task.

For Internal Use Only Person Attributes

Journals have the ability to designate a Person Attribute that is for internal use only. These attributes allow a publication to pre-define the attribute and a list of designations they can use to classify people. These attributes are invisible to Authors and Reviewers, but are visible to other roles.

The Admin can add the attributes to a person's account from the Edit User page.

In the example above, the Reviewer Ranking attribute has been created with the values listed on the left. Click on a value then click the **Add** button.

The Person Attributes may be used by Editors to search for Reviewers. When selecting a reviewer, the person attributed is available in the Advanced Search panel.

Advanced Search

Reviewer Account Information

Salutation:	First (Given) Name:	Middle Name:	Last (Family) Name:
Any ▼			

Degree:	E-Mail Address:	Comments:	

Institution:	Department:

City:	State/Province:	Postal Code:	Country:

ORCID iD

iD http://orcid.org/ [ ]

Person Designations:

```
All
DO NOT USE
Editorial Board Member
Statistical Reviewer
Society Member
```

Roles:

```
All
ScholarOne University Trainin... -- Client Configuration
ScholarOne University Trainin... -- Author
ScholarOne University Trainin... -- Reviewer
ScholarOne University Trainin... -- Associate Editor
```

Where to Search:

```
ScholarOne University Training Sites
ScholarOne University Training Workflow 1
ScholarOne University Training Workflow 4
```

Exclude Institution*:	Exclude Postal Code*:

*Multiple entries separated by commas are permitted

Keywords:			Specialties:	
	✓ Pick	AND ▼		AND ▼
	✓ Pick	AND ▼		AND ▼
	✓ Pick	AND ▼		AND ▼
	✓ Pick	AND ▼		AND ▼
	✓ Pick			

Reviewer Activity Information

	Min:	Max:
# Current Assignments		
# Assignments in Past 12 Months		
# Days Since Last Review Submitted		
# Invitations Declined in Past 12 Months		
R-Score		

Sort Order

Primary Sort:	Name (Last, First) ▼	Ascending ▼
Secondary Sort:	Number of Current Assignments ▼	Descending ▼

☒ Clear 🔍 Search

In the example above, the Reviewer Ranking attribute displays in the Advanced Search panel. Click the **Pick** button to select from the pre-defined values.

The search results show all reviewers with that attribute value. Click the **Person Details** button to view the attribute on the user's account information.

On the **Account Information Tab**, the Person Attribute will be shown in the **Attributes** section.

Merging Duplicate Users

Administrators should routinely check for duplicate user accounts. Duplicate accounts can prevent user from logging in, from getting their password when using the Password Help function, from locating a manuscript for review, and even from locating a manuscript that has received a decision. Thus, it benefits the journal Administrator to keep these duplicates to a minimum.

Multiple accounts can result from a user who has been entered into the system more than once, from Editors adding Reviewers "on-the-fly", from authors adding coauthors, and from users creating a second account. To correct such multiple accounts the solution is to merge them.

Considerations when Merging Duplicate Users

 Merging cannot be undone and should be done with caution. Before merging any account, it is important that you first consider the following.

- Confirm that the two (or more) accounts are for the same person before merging. You can generally do this by carefully examining the account details, but occasionally you may need contact the user to confirm.

- Determine which account should be the primary account.

- Only select accounts for a single person at a time. When selecting accounts to merge, if you see two accounts for John Smith and two accounts for Jane Smith, only select the accounts for a single user and perform the merge. Return later to merge the accounts for the second user. If you selected all 4 accounts, they would all merge, combining information for both John Smith and Jane Smith in the same user account.

- What is merged?

  - Historical manuscript data
  - Correspondence
  - Tasks to be completed.

- What is not merged?

  - Account information (address, password, etc.)
  - Keywords
  - Comments
  - "Has pending reminders for"

- Admins may not merge accounts for other Admins

If this confirmation window shows pending reminders, consider merging the accounts the other way. If you merge away an account with pending reminders the system will send the review reminder letters even after the user has submitted the review.

There are 2 ways to access the Merge Users page: from the user Search Results page and from the Merge Duplicate Users link located in the Tools section of the Admin dashboard. Instructions for each are detailed below.

Merge Users Method 1: User Search Results

If you notice duplicate user accounts when you have performed a user search, you can easily merge duplicate accounts from User Search results.

▶ **Merge User Accounts via Search Results**

172. Check the box to **mark for merge** each duplicate account and click the **Go to Merge** button.

173.   The Merge Users page opens, with the selected accounts displayed in the Search Results.

174.   Review the information to confirm that the accounts actually belong to the same person. You may need to contact the account holder to verify and determine the primary account. Remember to select only accounts for one user when merging.

175.   Select one radio button to designate an account as **Primary Account**. The other account information will merge into this one.

176.   Click the **Merge** button. (The Merge button can be found at both the top and bottom of the Search Results, for your convenience.)

177.   The system asks for confirmation before the merge is completed. A record of the merge is written into the primary account's Comments field. Click the **OK** button.

From mc-beta.manuscriptcentral.com

This will merge 2 accounts into one Primary account. Are you sure?

OK   Cancel
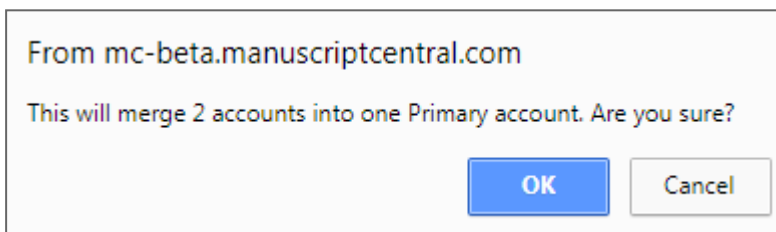
178.   When the merge is complete, you are returned to the search results. The accounts you merged are removed from the results. You may continue merging users from these results if desired.

Merge Users Method 2: Merge Duplicate Users Function

▶ Merge User Accounts via Merge Duplicate Users

179.   Select **Merge Duplicate Users** from the User Administration area of the Admin Tools dashboard.

User Administration

User Search
Add User Account
Merge Duplicate Users
Broadcast E-Mails
Broadcast E-Mails History
Extended User Search Results
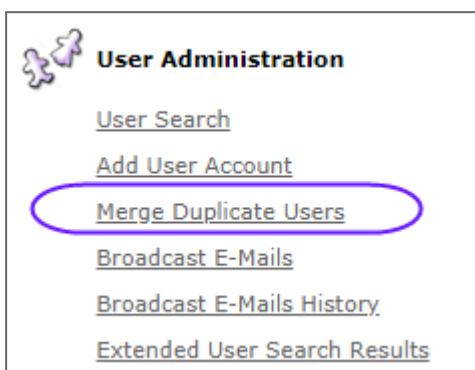
180.   The Merge Users screen displays. Select the radio for the search option you'd like to use. By clicking the radio button next to "Perform the search below," you can search for a specific user.

Merge Users

To merge potential duplicate users, search for the duplicate accounts by using the predefined searches below or search fields provided. From the search results designate the primary account and check the "Mark for Merge" box for the accounts that you wish to merge into the primary account. You can only designate one primary account for each set of search results.

Duplicate User Search

○ Search for users with inverted first and last names (Thomas Rose and Rose Thomas)

○ Search for users with the same last name and first initial

○ Search for users with the same ORCID iD

◉ Search for users with the same first and last name

○ Perform the search below (use wildcards (*) where necessary):

First (Given) Name: [   ]   User ID: [   ]

Last (Family) Name: [   ]   E-Mail Address: [   ]

(iD) http://orcid.org/ [   ]

Where to Search:
ScholarOne University Training Sites
ScholarOne University Training Workflow 1
ScholarOne University Training Workflow 4

Search

181.	Click the **Search** button to display the results in the lower half of the page.

182.   The grid format allows you to review the information to confirm that the accounts actually belong to the same person. You may need to contact the account holder to verify and determine the primary account. Remember to select only accounts for one user when merging. To make reviewing easier, you can set a filter and expand the results to be full screen. You can also customize your columns of information.
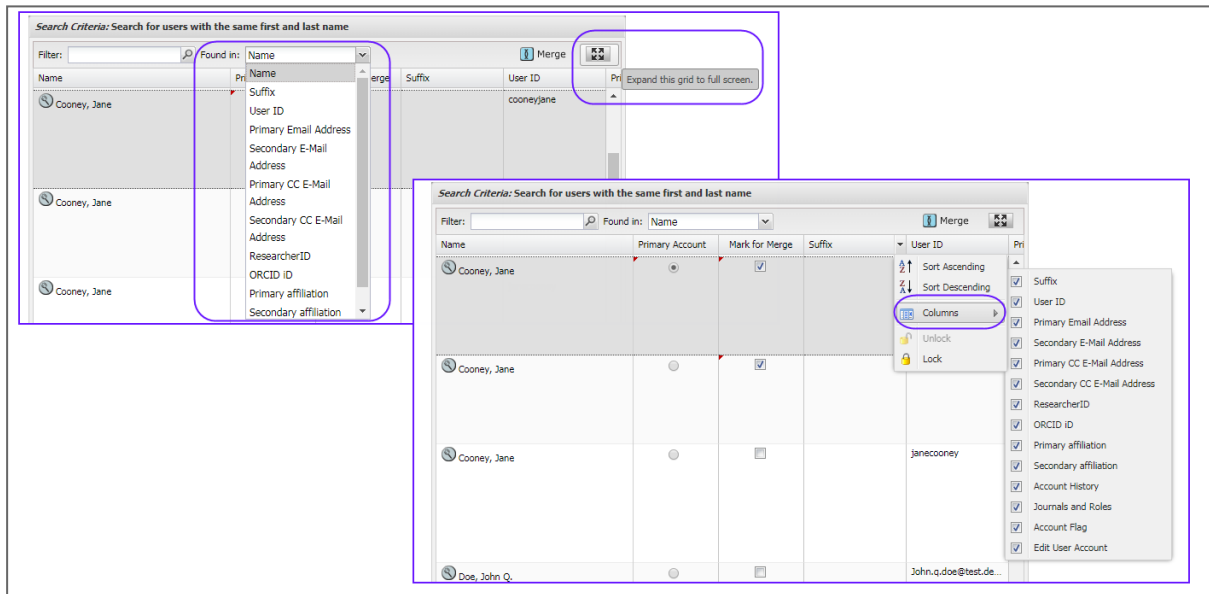
183. Select one radio button to designate an account as **Primary Account**. The other account information will merge into this one.

184. Click the **Merge** button.

185. The system asks for confirmation before the merge is completed. A record of the merge is written into the primary account's Comments field. Click the **OK** button.
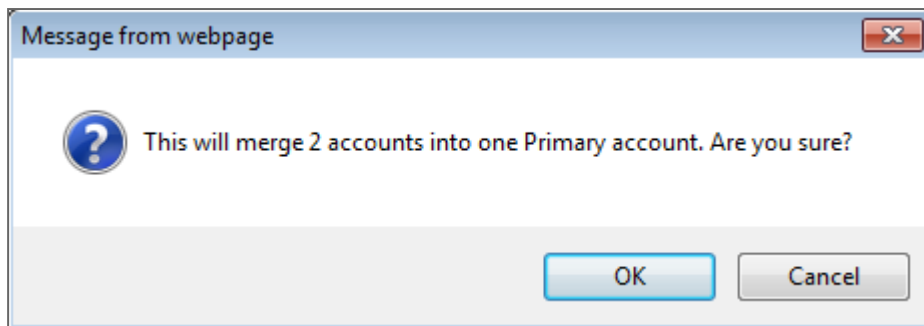
186. When the merge is complete, you are returned to the search results. The accounts you merged are removed from the results. You may continue merging users from these results if desired.

Web of Science Group

Broadcast Emails

The Broadcast Email feature allows the Journal Administrator to create and send an email message, independent of tasks or documents, to a large group of users. For example, you could use this feature to send a thank you to all reviewers at the end of the year.

All broadcast e-mails sent are captured in Broadcast E-Mails History.

▶ Create Broadcast E-Mail

187.   The first step in sending a broadcast email is to create the e-mail template you wish to send. Do this in the **System E-mails > Misc. Event-Driven E-Mails** section of your E-mail Templates.

Refer to **ScholarOne Manuscripts Email Template User Guide** linked here for instructions.

Note: When creating a new broadcast email, it is important to use the Person tag (instead of the PRole tag) in the **To**: field. Also, be sure to mark the new template as Active.

---

188.   Select **Broadcast E-Mails** from the User Administration area of the Admin Tools dashboard.
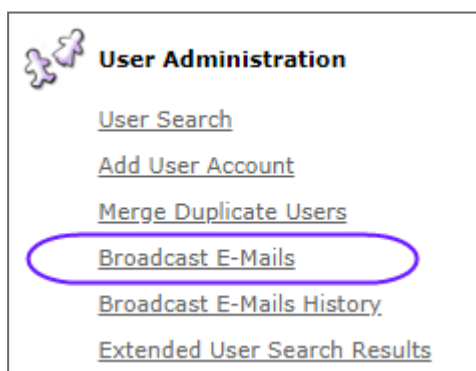
189.   The Broadcast E-Mails page displays.

190.   Run the user search. You may use a combination of any of the following selection criteria to perform your search.

- User Account Information – Search for a specific user, or use Keywords associate with the user account to select users
- Filter Options – use pre-defined filter criteria based on role and other criteria

191.   Select the e-mail template you created for this broadcast email from the dropdown list of selections.

192.   Click **Schedule Search**.

193.   The following page displays.

Depending on the size of the search, results may take up to 30 minutes to display. You can click the **refresh** link on this page, or you may leave the Broadcast E-Mail feature to perform other tasks. You will be notified by email when the search is completed.

At any time before the search results are available, you may cancel the search by clicking the **Start a New Search** button. This action returns you to the main Broadcast E-Mails page.

194.   When the search is completed, the results display in sets of 10. Use the **Results** dropdown list or the arrows to move through pages.

195.   By default, all users in the search results are selected. You may exclude users from the e-mail by deselecting their **Include in E-Mail** checkbox.

If the results do not include the expected users you may wish to abandon the search results.   Click the **Start a New Search** button. This action returns you to the main Broadcast E-Mails page. Otherwise, search results remain available for 7 days. After 7 days, the main Broadcast E-Mails page re-displays.

196.   Click the **Send Test E-Mail** button to send a test to yourself to verify the email.

197.   Perform a final review of the broadcast e-mail sent to your email inbox. When the test e-mail is sent, the Confirm E-Mail window displays.

Confirm E-Mail

You have indicated that you would like to send a broadcast e-mail to **114** users. If you are sure you would like to send this e-mail, click the "Send E-Mail Now" button below. Once you have clicked the Send button, this email cannot be stopped. Please note that it may take up to 24 hours for the emails to be sent. Thank you for your patience.

↺ Start a New Search   ✉ Send E-Mail Now

198.   Click the **Send E-Mail Now** button to send the mail to all broadcast recipients.

Note: E-mails will be sent in batches of 200 at a time. If you are sending more than 200 emails, you will be prompted to send each batch.

Tip: Do not use the CC field when sending a Broadcast E-mail. The email address in the CC field would receive a copy of each of the emails sent.

Broadcast E-mails History

Once the e-mails are scheduled for sending they are recorded in Broadcast History. View the list of broadcast e-mails sent by clicking the **Broadcast E-Mail History** link in the User Administration section of Admin Tools. A table lists the broadcast emails sent from your journal site. You can click the **view search criteria** link. Clicking displays the details of the send and gives you the opportunity to view the e-mail.

E-Mail ID	Template Name Sent by Date Sent Time Sent	To Cc Bcc From	# Successes # Failures # Pending	Details
20531	##JOURNAL_NAME## Cooney, Jane 25-Apr-2013 2:39 PM	To ##PERSON_EMAIL## Cc BCC: From: ##USER_EMAIL## view search criteria	14 0 0	🔍

Using the Person Details Page

The Person Details page provides you with a summary of the user account information and role information for a person.

▶ Viewing the Person Details Page

199.   You can access a user's Person Details page in several ways. Two common ways are detailed below, however, any time you see the magnifying glass next to a person's name, you can click to access the Person Details page.

  a. From the **View Manuscripts** page when performing any of the Admin Lists tasks including assigning Editors and selecting Reviewers. Click the **Details** (magnifying glass) button.

Admin Complete Checklist 1 Blinded				Manuscripts 1-1 of 1
Manuscript ID ↑ Manuscript Type	Manuscript Title Submitting Author	Date Submitted ↓	Status	Take Action
MCU1-201803-0002-OA Original Article	Original Research Article in Biology [View Submission] 🔍 King, Sally (contact) (proxy)	13-Mar-2018	AE: Not Assigned EIC: Not Assigned ADM: Not Assigned • Complete Checklist (Due 12-Apr-2018)	Select... ▼
↳ Export to CSV				Manuscripts 1-1 of 1

  b. When performing a User Search, click the **Details** button in the search results.

200. The Person Details popup allows you to view valuable user information. Information will vary depending upon how you access the Person Details tab and what roles the person has in the system. In the example below, you see the Account information tab and two role history tabs, AU History and REV History.

201. **Account Information Tab**: The list below contains all the possible information that will be displayed. Not all items will be displayed for all users. For example, if you are viewing someone with only the Author role, you will not see a "Send a Reminder E-Mail to this Reviewer" item.

a. **Account Information**

- User information including name, user ID, primary email address, and roles.

- Hyperlinked name will open an editable email addressed to that person.

- You may apply a flag to the user. Only available if configured for your site and role.

- External Links section allows you to view author information in PubMed.

b. **Attributes** may vary by site and can be used to identify a user's area of expertise, member status, or other identifying information. This aids in identifying appropriate reviewers for a manuscript. In the example below, a pink asterisk indicates free-text keywords. No asterisk indicates keywords are selected from a pre-defined list.

Attributes	
Key Words:	
Please choose up to 5 keywords from the list:	language processing, Stuttering, diffusion tensor, white matter fiber pathways, Motor control
Specialty/Area of Expertise:	Diffusion Tensor Imaging *, Language *, Stuttering *

c. **Comments** are used by the Admin and customer support at ScholarOne to make notes on an account for items such as merging duplicate accounts.

d. **Administration Options** allow the Admin to send an email with a link to the password reset process to the user or to delete the user account (if configured). Do not delete an account if it is tied to any submission, as you will lose historic data about that user on the submission.

e. **Send a Reminder E-Mail to this Reviewer** allows you to send an email directly to the reviewer from their Person Details screen.

f. **Correspondence** contains a link which expands the correspondence history of the user. You may resend email from here.

g. **Password History** contains a link which documents the password history.

202. Role History Tab: There will be one or multiple role history tabs, based on the roles granted to the user. Each tab contains the following:

a. **History Analysis** by Role (including details) for the person.

b. **Manuscript History Statistics** include recommendations and decisions by that person for manuscripts.

c. **Change reminder dates** to Authors for submitting their revised paper.

Revision / Resubmission / First Look Update Reminders

MCU1-2013-04-0003
The amazing world of Education
☑ 26-Jun-2013   📅▾   Reminder: ScholarOne University Training Workflow 1

MCU1-2013-05-0006.R1
Monday training
☑ 29-Jun-2013   📅▾   Reminder: ScholarOne University Training Workflow 1

d. **Grant an Extension** to a reviewer to allow more review time. Enter an extended due date. You may also consider sending a manual reminder email.

Reviewer List

Order	Name	Status	History	Remove
1 ▾	Griffin, Carla 🔍 Grand Junction Regional Center, Science proxy Grant an Extension	Agreed	Invited: 12-Mar-2018 Agreed : 12-Mar-2018 Due Date: 11-Apr-2018 Review Last Saved: 12-Mar-2018 Time in Review: 3 Days. view full history edit reminders	☒

Alternates

Grant an Extension:

Due date for Reviewers Score: 11-Apr-2018   📅▾

↻ Go
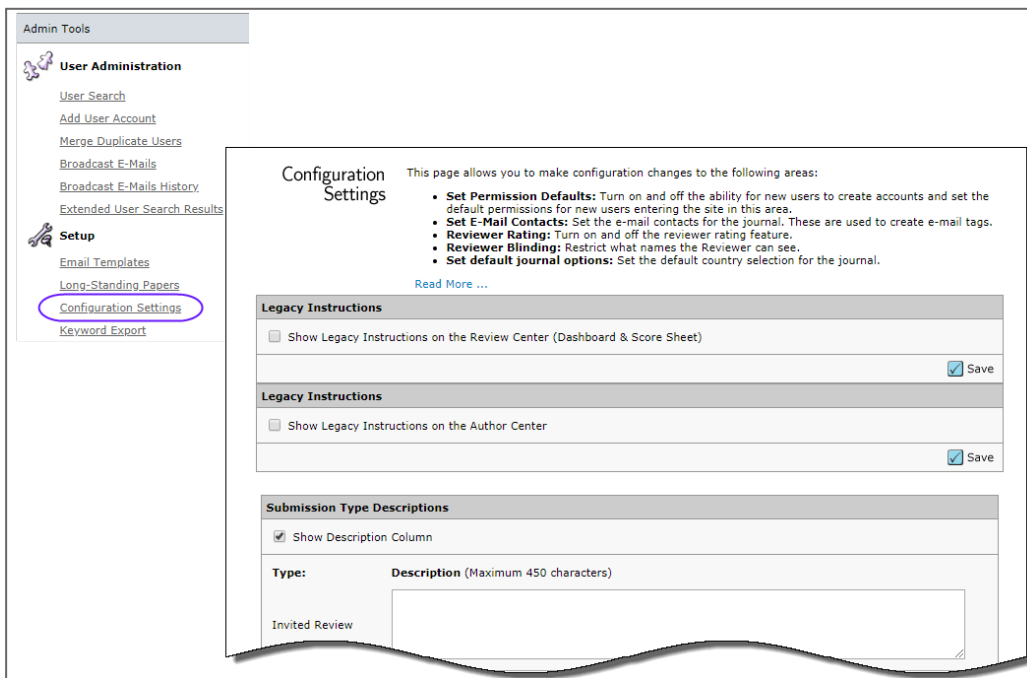
SETUP TOOLS

Email Templates (link to Guide)

Email Templates are used to send pre-defined emails to users when certain actions occur. These templates may be customized to your journal's specific needs. Please see the *ScholarOne Manuscripts* Email Template User Guide for details.

Configuration Settings

ScholarOne configures these settings for your site prior to going live. You have access to this information, but we highly recommend that you do not change some of the settings. See below for a table of the settings and our recommendations of whether you should change them.

The Configuration Settings page allows you to view and edit key configuration values:

Feature	Recommendation
Turn reviewer rating feature on or off	Do not change without consulting ScholarOne You will lose historical data if you turn off this feature
Reviewer and Reviewer Center configuration options	OK to change
Set invited author invitation reminders	OK to change
Set permissions defaults - the roles automatically assigned to all users when their accounts are created. –	Do not change without consulting ScholarOne Will limit users ability to access the system and will affect historical data
Set email contacts	OK to change
Setting Default Journal Options	OK to change

▶ Activating/Deactivating Reviewer Rating

Reviewer rating allows Editors to rate the reviewers. We recommend that you do NOT change this without consulting ScholarOne.

203.　　Select **Configuration Settings** from the Admin Tools.

204.　　Select or deselect this check box to turn the Reviewer Rating feature on or off.

205.　　Click **Save**.

▶ **Configuring Reviewers and the Review Center**

206.　　Select **Configuration Settings** from the Admin Tools.

Reviewers and the Reviewer Center
The Reviewer can see the following people's names on the Details Tab in their Manuscript Details
☐ Associate Editor
☐ Editor-in-Chief
Reviewer Invitation Reminders
When a Reviewer has been invited to review, but has not responded to the invitation, you may send them up to two reminders. Enter the number of days that should elapse from the time they are invited until the time the reminder is sent. The reminder letters can be configured in the System E-Mails section - they are called "Reviewer Invitation Reminder 1" and "Reviewer Invitation Reminder 2."
3　Reviewer Invitation Reminder 1
5　Reviewer Invitation Reminder 2
Overdue Reviewer Response
How many days after a reviewer has been invited is their response to the invitation considered "overdue"?
5　days
☑ Save

207.　　Select the checkboxes if you wish the Reviewer to see the listed people's names on the Details Tab in their Manuscript Details. This is a blinding feature. Editor names will only be displayed to the Reviewer in the Manuscript Details screens if they are checked here.

208.　　You can send up to two invitation reminders to a reviewer. Enter the number of days from invitation to reminder. To send no reminders, leave the fields blank.

Note:　Be sure to set up Reviewer Invitation Reminders in the journal's System E-mail templates.

209.　　**Overdue Reviewer Response** – This setting indicates the number of days until a reviewer response to **invitation** becomes overdue. This setting flags overdue reviewer responses in red, in both the appropriate manuscript lists and in the header of the manuscript.

210.　　Click the **Save** button.

▶ **Setting Invited Author Invitation Reminders**

211.   Select **Configuration Settings** from the Admin Tools.

Invited Authors

Author Invitation Reminders

When an author has been invited to submit but has not responded to the invitation, you may send up to two reminders. Enter the number of days that should elapse from when the author is invited until the reminder is sent. The reminder letters, named "Author Invitation Reminder 1" and "Author Invitation Reminder 2", can be configured in the "System E-Mails" selection area of the E-mail Templates section.

[3]   Author Invitation Reminder 1

[5]   Author Invitation Reminder 2

Overdue Author Response

How many days after an author has been invited is their response to the invitation considered 'overdue'?

[0]   days

☑ Save

212.   If your journal has an invitation or MRW workflow, you can send up to two invitation reminders to an invited author. Enter the number of days from invitation to reminder. To send no reminders, leave the fields blank.

Note: Be sure to set up Author Invitation Reminders 1 and 2 in the journal's System E-mail templates.

213.   Click the **Save** button.

▶ **Setting Permission Defaults**

We recommend that you **do NOT** change this without consulting ScholarOne.

214.   Select **Configuration Settings** from the Admin Tools.

Set Permission Defaults

☑ Allow users to create accounts?

☑ Author
☑ Reviewer

☑ Save

215. You can remove the ability for users to create their own accounts by deselecting the **Allow users to create accounts?** checkbox.

216. Check the boxes corresponding to role names to assign permission defaults for your system. Each new user will automatically be granted the permissions for the checked roles. (We suggest author only or author and reviewer).

217. Click the **Save** button.

▶ Set E-mail Contacts

218. Select **Configuration Settings** from the Admin Tools.

219. This section allows you to configure the names and contact information for the Journal Administrator and the Editor in Chief. Fields using email tags for these people will populate with this information. ScholarOne uses this information to contact the journal.

220. Enter a default email address to use for users who do not have an email address listed in their account. Typically, these emails will go to the Journal Admin. Be sure to check this email box often for emails. This feature alerts you to user accounts that no longer have a valid email address.

221. Enter a description of your journal if needed.

222.   Enter an E-Mail address to send errors to. Typically, these emails will go to the Journal Admin.

223.   Click the **Save** button.

▶ Setting Default Journal Options

Default Journal Options are used as part of the export information for accepted papers.

224.   Select **Configuration Settings** from the Admin Tools.

Set default journal options		
Default Country:	United States ▼	
Print ISSN:		
Digital ISSN:	N	
Journal abbreviation:	S1U	
		☑ Save

225.   You can set a number of defaults including country, print and digital ISSNs, and your journal name abbreviation. This information becomes part of the manifest that is sent out when exporting files for publication.

226.   Click the **Save** button.

▶ Ringgold Alerts

This option allows journals to deactivate alerts by unchecking the box.

Ringgold Alerts	
☑ Activate alert to indicate accounts not connect to Ringgold? (Recommended)	
	☑ Save
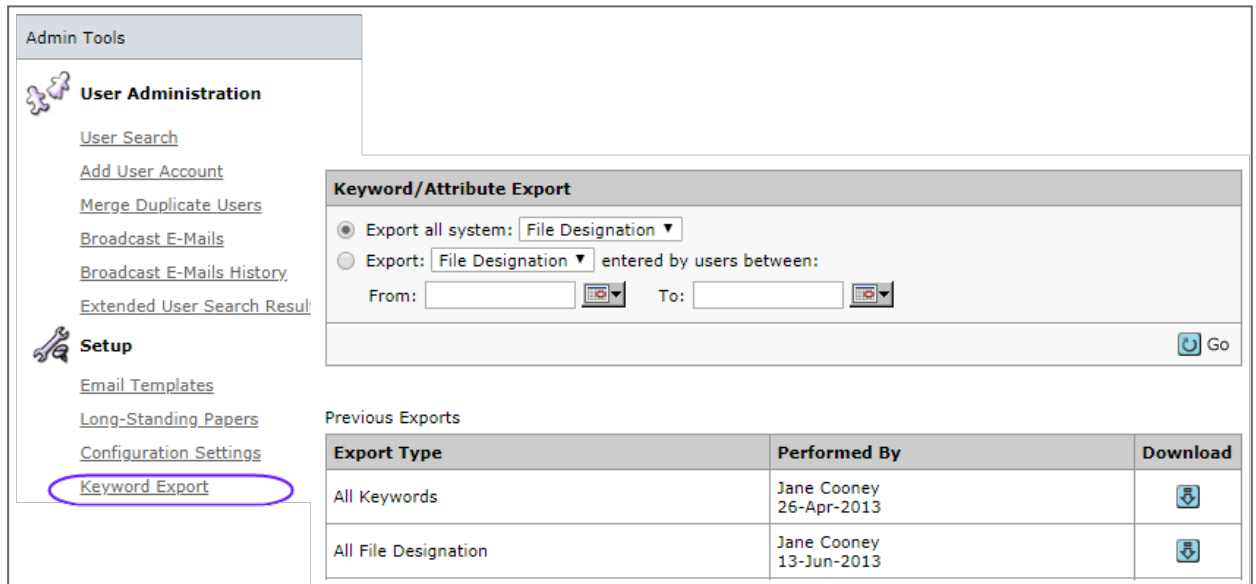
Exporting Keywords Lists

The keyword export feature allows you to export your journal's list of attributes/keywords as a CSV (comma separated values) file. The list will show all keywords, whether active or inactive. This may be particularly useful for a journal with no pre-defined list of keywords, allowing users to enter any keywords in a text box.

Tip: Alternately, you can use Cognos reports to create a report that includes the keyword list as well as additional information such as the percentage of manuscripts submitted that have selected specific keywords from the pre-defined list or which authors and reviewers have certain keywords.

▶ **Export Keywords**

227. Select **Keyword Export** from the Admin Tools.

228. Choose what you want to export by selecting one of two radio buttons:

- Export all system: choose from the dropdown list. – Select Keywords.
- Export [choose from dropdown list] entered by users between: select **From:** and **To:** calendar dates. – Select Keywords and enter the date range.

229. Click the **Go** button. You are prompted to save the file to your local drive. You can then open the file in Excel.

The export includes:

- A: Keyword's unique identifier

- B: Keyword

- C: The Keyword's parent identifier in a multi-tiered hierarchical list. For alphabetical lists, and top tier entries in a hierarchical list, this number will be 0.

230.   Performing an export will refresh the page and add the export to the Previous Exports table. This table lists the type of export performed, who performed the export, when it was performed, and the option to download the file produced.

Tip: For best results, sort the downloaded spreadsheet by the first column for a hierarchical list and the second column for a flat alphabetical listing.

ADDITIONAL ADMINISTRATIVE FUNCTIONS

CONFIGURING CONTEXTUAL INSTRUCTIONS
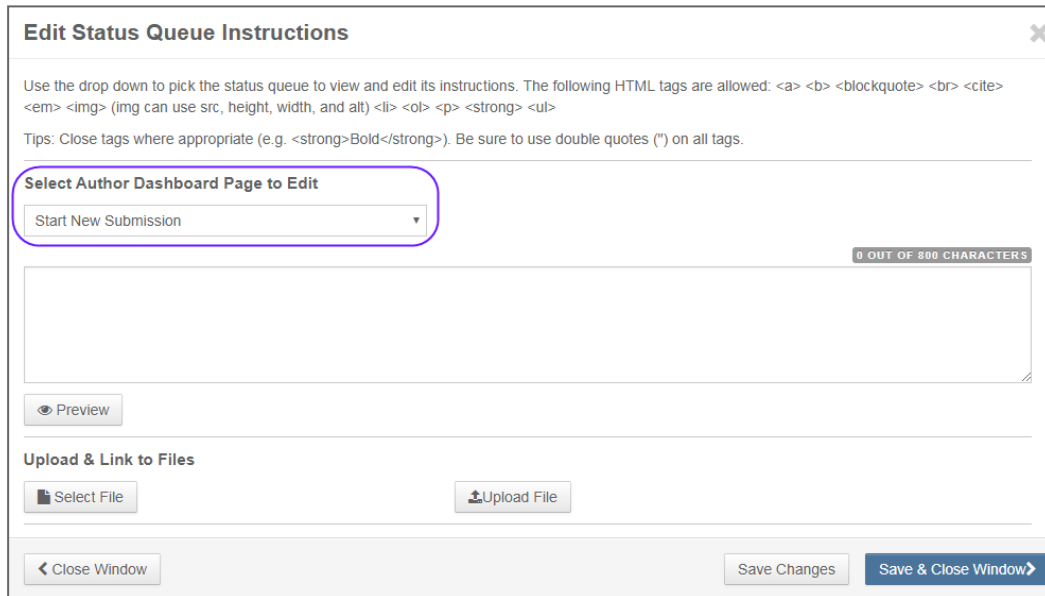
Contextual instructions appear near each field in the Submission process and are denoted by a question mark icon. These instructions provide information about the associated field. These instructions may be customized by the journal administrator.

▶ Configuring Contextual Instruction for the Author Dashboard
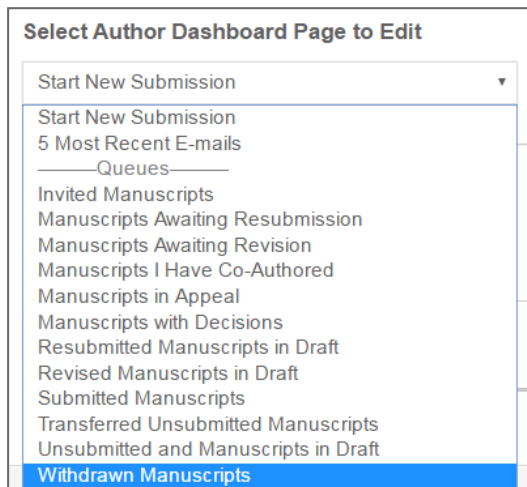
231.   Select the **Configure Instructions** link at the bottom of a page.
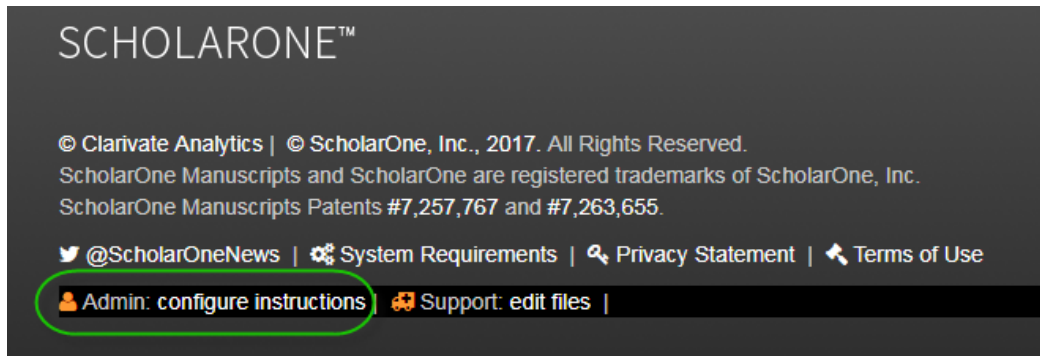
232.   The Instructions dialog box opens. Here you can add, instructions, files and links and YouTube videos for your Dashboard Queues.

233. Dashboard Queues are the different the types of submission and author may need to submit or view.

234. For security and usability reasons, the following HTML tags are *allowed*:

  a. <a> (Creates hyperlinks)

  b. <b> and (Bolding)

  c. <blockqoute>

  d. <p> and
 (Paragraphs and breaks)

  e. <cite> and <em> (Creates emphasis)

f.   <img> and <src> (Images and their source)

g.   , <ul>, <li> (Lists)

Note: Close tags to ensure instructions render correctly *(e.g. text)*.

▶ Configuring Contextual Instruction for the Author Submission pages

235.   Open the Author Center and click the link Begin Submission.

236.   Each field will contain a question mark icon with the word Edit next to it. (Note: The Edit function is only visible to Administrators).

237.   Click the **Edit** link. The Edit Tooltip Text dialog box opens.
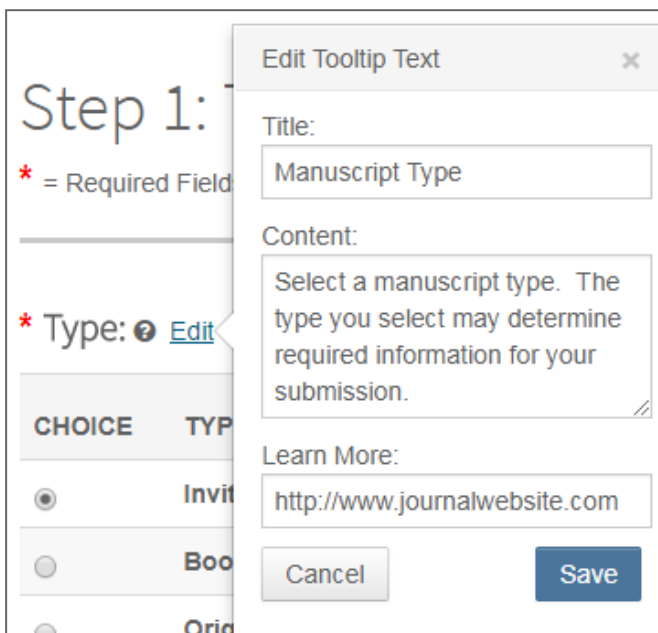
238.   Enter a title, the content of the contextual help, and in Learn More, you may put a link to an external web site for further information.

239.   Click the **Save** button.

240.   Click the **question mark** icon to view the completed instructions.
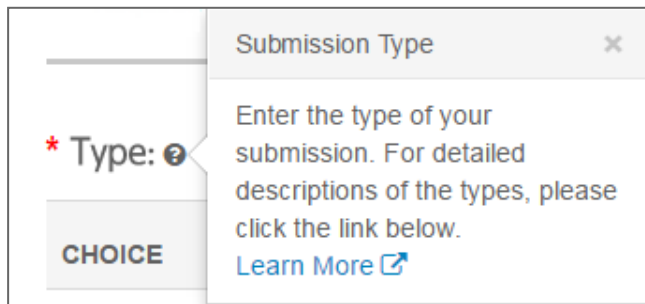
Note: The question mark icon will only display to users if instructions have been configured. The question mark icon and help link will always display to administrators.

CONFIGURING JOURNAL-SPECIFIC INSTRUCTIONS FOR USERS

Instructions & Forms
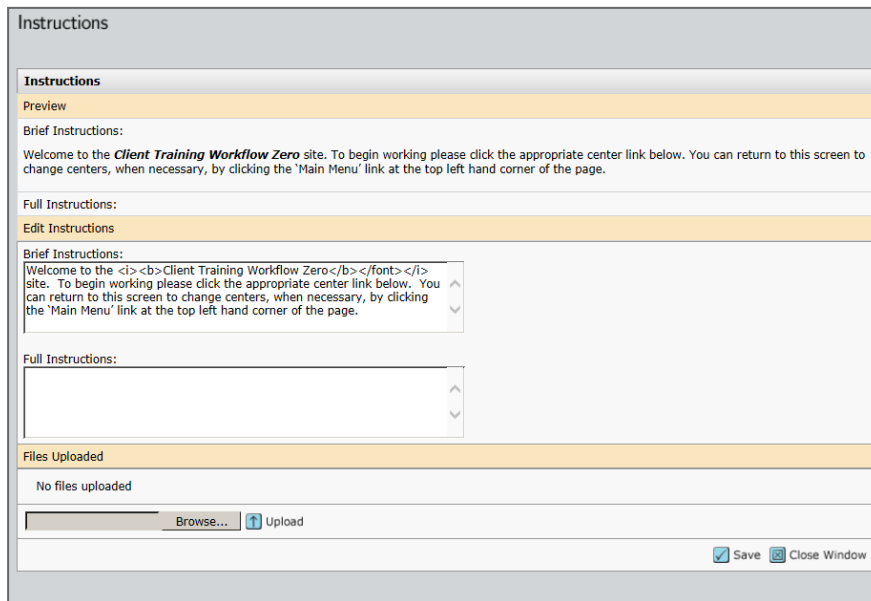
As the journal administrator, you may have been granted the permissions to customize all page instructions. This is particularly helpful for ensuring that your journal's processes are followed for every role.

▶ **Configuring Instructions**

241.   Select the **Configure Instructions** link at the bottom of a page.
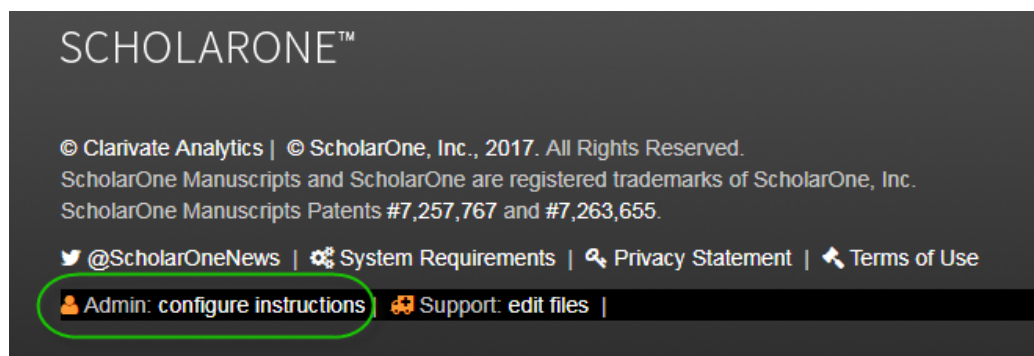
242.   The Instructions dialog box opens. Here you can add, edit or delete the brief and full instructions and insert links to files.

243.   The **Preview** section displays the instructions as they currently appear on the page. This section will update with any changes you make after you click the Save button at the bottom of the screen.

244.   Enter instruction text in **Edit Instructions** section.

Tips: You may copy and paste from a basic text editor, such as Notepad. Do not copy and paste from Word.
You may use HTML to format your text. Please test HTML formatting on mc-impl before applying to your live site. See the *Formatting Tips* section below.

- **Brief Instructions** display at the top of the page. We typically recommend this be no more than 3 or 4 lines.
- **Full Instructions** will display by a clicking a link at the end of the brief instructions. Use this section for more detailed information.

245.   To include a link to a file, first upload the file to the system by clicking **Browse**. Locate and double-click the file, then click **Upload**. The page refreshes to show the file has successfully uploaded to the site.

Files Uploaded

- S1M Author Guide_GB.docx
  Link to this file: `<A HREF="/societyimages/s1u-wf1/S1M Author Guide_GB.docx" target="_new">S1M Author Guide_GB.docx</a>`
  Uploaded on 02-May-2013 - [delete]

246.   Now create a link to the uploaded file by copying the full HTML "**A HREF**" tag and pasting it where you want the link to go in either the Brief Instructions or Full Instructions.

247.   Click the **Save** button.

Formatting Tips

We strongly recommend that you use formatting sparingly and with purpose when creating instructions.

You may use HTML to format the text of your instructions. It is best practice to use formatting and color sparingly. Too much makes your text difficult to read and loses impact. See some examples below.

Example 1: Poor Formatting

In this example:

- Everything is bold which means that no additional emphasis is added to any particular text through the bold format

- There is only one bullet with multiple instructions under it. Use bullets to distinguish like items.

- Blue is used for the heading as well as the first part of the bullet. These two things have different purposes so they should not have the same formatting.

- Red color was used for "Save and Continue", but red should be reserved for warnings.

Example 2: Improved Formatting

Be sure to read all instructions completely!

To enter your manuscript attributes/keywords, you may do it in two different ways:
- Search the journal's list of keywords, by typing in a term and clicking **Search**, or
- Select your keywords from the list (Control-Click to select multiple words), and click **Add**.

When you are finished, click **Save and Continue.**

Please only enter serious keywords for scholarly work.   Read More ...

- Blue is now used only for the heading, to call the reader's attention to the instructions.

- Bold is only used to highlight certain parts of the instructional text.

- Using bold to highlight the button names (Search, Add, Save and Continue) allows us to remove the quotation marks, providing a cleaner look.

- Save and Continue is no longer red, as it is not a warning.

Basic HTML Codes for Formatting

To format text in HTML, you must put a code before and after the text. Examples are below

Formatting	Start Code	End Code
Bold		
Italic	<i>	</i>
Bullet		
Color		

	Note: you may change the color name to another color such as red or green.	
Paragraph	<p>	</p>
Line Break	 	

ABOUT ATTRIBUTES (KEYWORDS)

Attributes (keywords), are characteristics associated with a user or a submission. Combination attributes are characteristics used to describe both. File designations are also a type of attribute.

Keywords may be a pre-defined list of keywords specific to your journal to allow it to be specific to your field of study or industry. It may only be changed by ScholarOne. Keywords may also be a free-text field depending on journal configuration.

User Attributes

User attributes are selected by the user when creating or modifying their account. You may have multiple user attributes as shown in the example below.
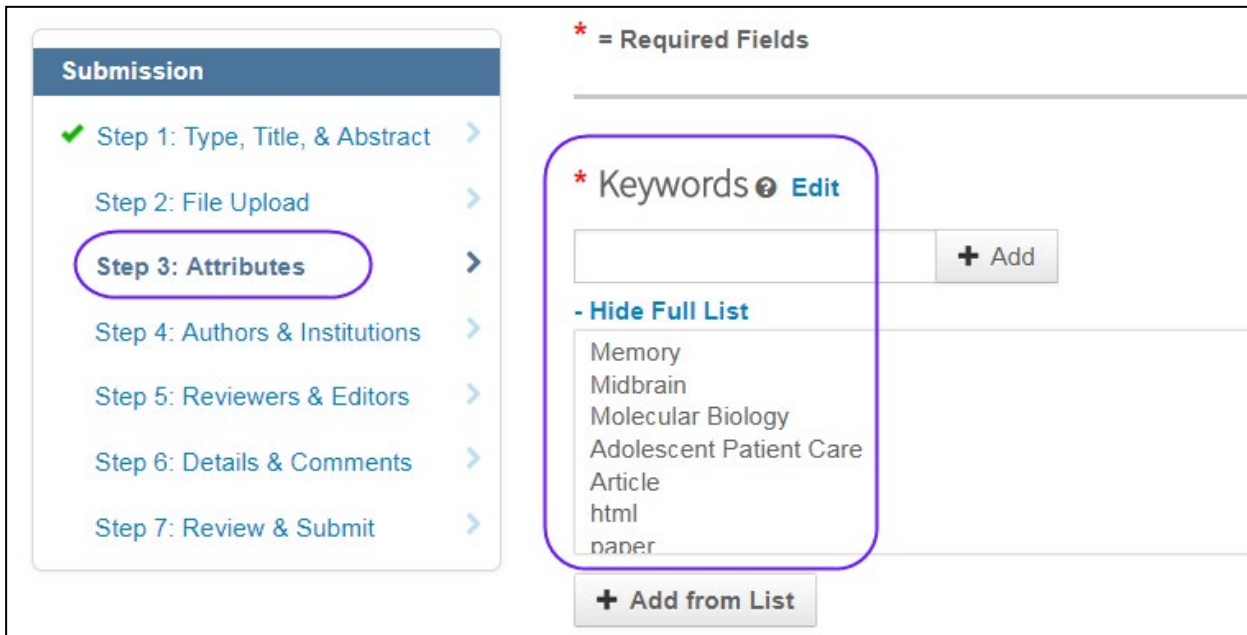
Examples of the attributes used to describe a person:

- Areas of expertise

- Specialties

- Membership status

Submission Attributes

Submission attributes or keywords are selected when submitting the manuscript and describe the content of the manuscript.

Examples of the attributes of a manuscript submission:

- Subject categories

- Keywords

- Classifications

Combination Attributes

Use combination attributes when you are trying to match submissions to users. This requires that the keyword list for people added to the system and for document submission be the same.
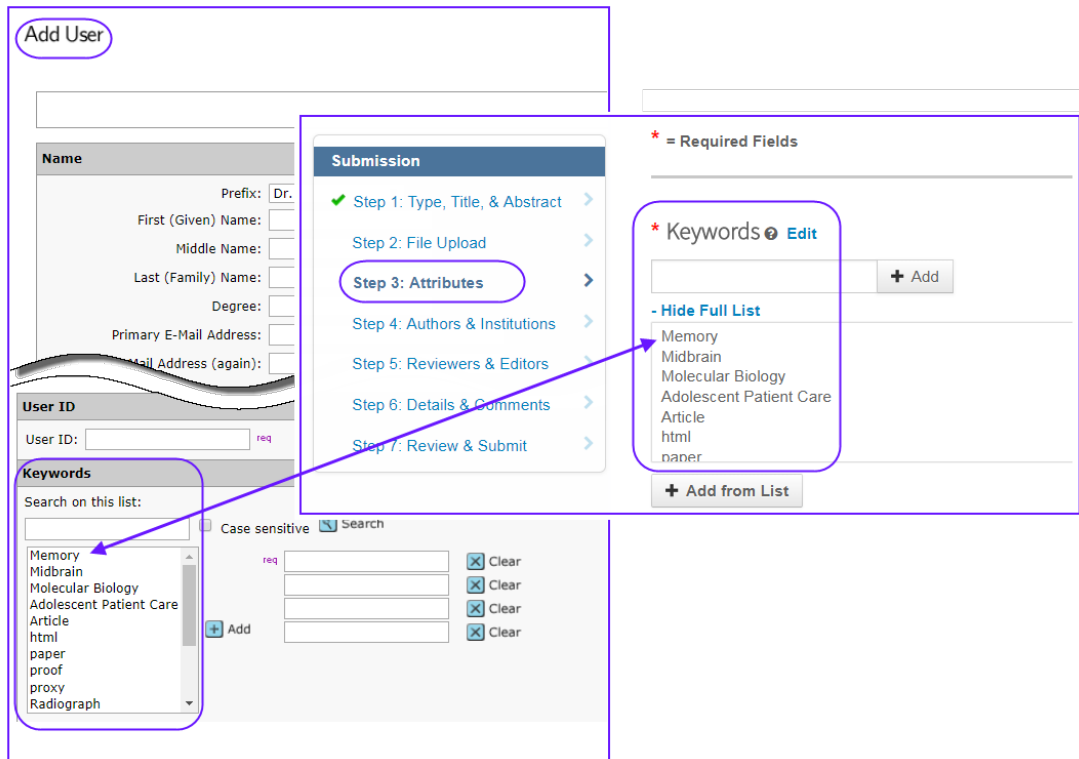
Auto-Suggest feature

This feature uses the combination attribute in finding matches. It matches the attribute on the manuscript information with the corresponding attribute on the within user accounts. The most common search type is for reviewer selection and assignment.

File Designations

Manuscripts are composed of file and their file designations, which are another kind of attribute. File designations describes the content of a file included in the submission. File designations are used to determine what is included or excluded in the PDF proof used for peer review.

Common file designations include those seen here:

GRANTING EXTENSIONS TO AUTHORS

Depending on how your site is configured, the ability to grant an extension to the author for a revision is usually an Admin task, but can also be configured that the role that made the final decision can also grant an extension.

Granting extensions is useful to prevent authors from submitting a revision as a new submission. When the due date has passed, the link to create the revision/resubmission goes away in the Author Center, leaving only the option to submit a new submission. Extending the due date allow the submission of the revision on the original manuscript, preserving the connection between versions and maintaining the integrity of your statistics.

▶ Grant Extension to an Author

248.   If configured, the **Due On** field will appear in the Peer Review Milestones section of Manuscript Details.   (If a revision is in progress, the Due On field will appear on the latest manuscript version's Manuscript Details page.)

249.   Select a new due date from the drop-down list.

250.   Click the **Save** button.
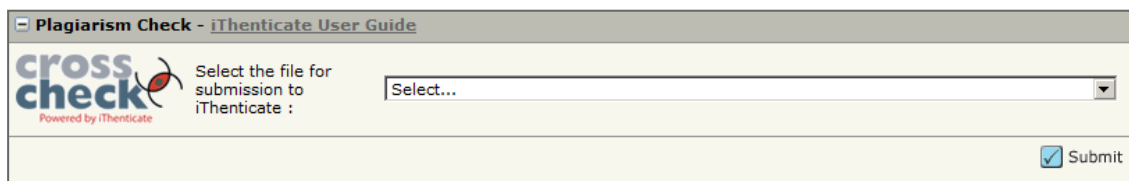
PLAIGIARISM CHECKING

Plagiarism checking is accomplished by a third-party provider, but is fully integrated within *ScholarOne Manuscripts*. Prior to configuring plagiarism checking within a journal site, clients must establish an account with the CrossRef and iThenticate services.

More information about signing up for CrossRef and iThenticate can be found at http://www.crossref.org/crosscheck.html.

▶ Using iThenticate Plagiarism Checking

251.　　Access the iThenticate feature on the Manuscript Information tab.

252.　　Select the file to submit for submission to iThenticate from the drop-down list then click the **Submit** button.

253.　　You will receive a message stating that the file was submitted. When complete, select the link to **View the Originality Report**.

254.　　The Report displays.

Note: On revisions, you may view the originality report run on a previous version. It will appear as a link in the Plagiarism Check section shown above.

ORCID INTEGRATION

Open Researcher and Contributor ID (ORCID) is a non-profit organization dedicated to solving the name ambiguity problem in scholarly communication by creating a central registry of unique identifiers for individual researchers and an open, transparent linking mechanism between ORCID and other current author identifier schemes. To learn more about ORCID, please visit https://orcid.org/content/initiative. Journals or publishers must have their member credentials established with ORCID before integrating with ScholarOne Manuscripts.

If your site is configured to collect ORCID iDs, authors will be able to create or link to an existing ORCID iD during the account creation and submission processes.

Authors, co-authors, reviewers, and other users may be prompted to link an ORCID iD to their account via an email. Admins can create an email template using the ##PERSON_ORCID_UPDATE## email tag. The email will contain a link to a dedicated page to update the ORCID iD. They will not be required to log in.

COPYRIGHT CLEARANCE CENTER RIGHTSLINK® FOR OPEN ACCESS INTEGRATION

As a stand-alone feature, or in combination with the RightsLink integration for collecting Article Processing Charges, journals have the ability to collect the publication model as a document property. Journals have a standard, Article Type-driven option for determining the publication path for a submission. Once submitted, the document property can support downstream workflows within *ScholarOne Manuscripts* and will provide a common interface for maintaining your internal or partner system workflows.

For journals or article types strictly published under the Open Access Model (pure OA), a checkbox allowing the Authors to acknowledge the article's publication under Open Access will appear.

For journals or article types that allow the Author to choose whether they wish to publish under the Open Access Model (hybrid), the Author can indicate their choice prior to submitting the manuscript.

For journals with a blend of publication models (hybrid, pure OA, or none), the ability to configure the Author Workflow by Article Type is available. In addition, the instructional text

and labels for the required Open Access and author choice models are customizable to your journal's specifications.

In collaboration with Copyright Clearance Center, *ScholarOne Manuscripts* now integrates with the RightsLink® for Open Access workflow to support the unification of complex editorial and Open Access payment model workflows. There are two primary and highly configurable integration points available within the ScholarOne Manuscripts workflow. In both the author estimate and payment integration cases, *ScholarOne Manuscripts* provides RightsLink® for Open Access with the configurable sourced article metadata needed to drive complex payment models.

Pre-submission: The Author submission workflow provides the ability to view an estimate of post-acceptance charges prior to submitting their paper for peer review.

Post-acceptance: Using a workflow task in *ScholarOne Manuscripts*, journals have highly flexible options for initiating the payment workflow in RightsLink and proficiently maintaining, tracking and collecting Article Processing Charges and other publication fees.

Journal administrators and production staff have the ability to track the payment status and details across the *ScholarOne Manuscripts* and RightsLink applications.

In addition, journal administrators and production staff have several tools for tracking payment information and maintaining the editorial and payment workflows from within *ScholarOne Manuscripts*. Journal administrators and production staff have the:

- Ability to link to the RightsLink application for additional payment details

- Ability to complete the payment task, advancing the ScholarOne Manuscripts workflow without impacting or closing the payment collection workflow in the RightsLink application

- Ability to send a meta-data update to support article changes after the payment workflow is initiated in the RightsLink application

Finally, when the payment workflow is complete in the RightsLink application, the payment task closes and the author dashboard updates to display a link for viewing the payment information in the RightsLink application.

Learn more about [Copyright Clearance Center](#)

Learn more about [RightsLink® for Open Access](#)
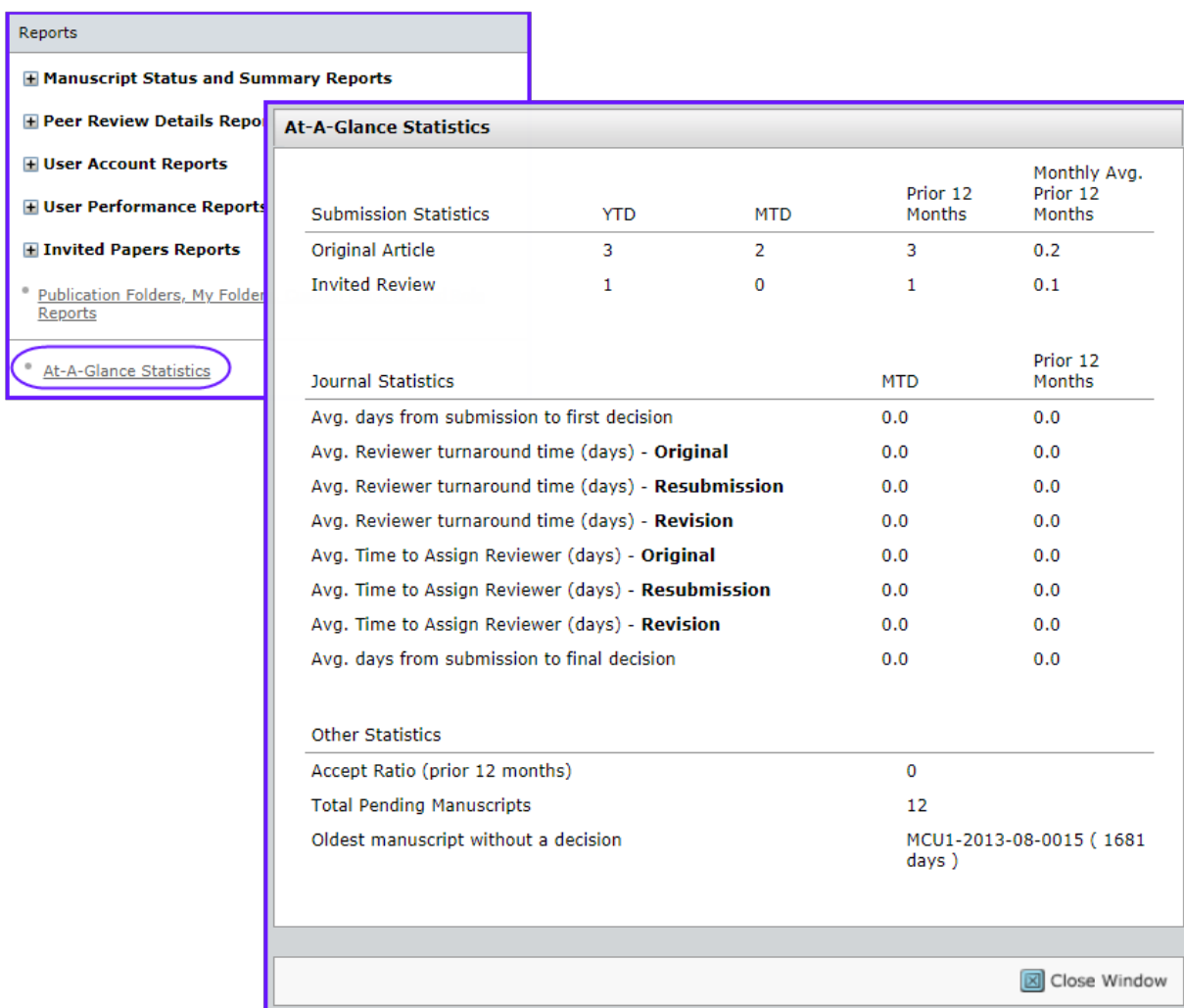
REPORTING

At-A-Glance Statistics

The At-A-Glance Statistics report is available by journal permission on your dashboard. Usually, the Administrator and Editor in Chief role dashboards have a link to view general statistics regarding your site.

▶ Access At-A-Glance Statistics

255. Click the **At-A-Glance Statistics** link at the bottom of the Admin Dashboard.

256.   The At-A-Glance Statistics window displays the following items:

a.   **Submission Statistics**: This section displays submission totals by manuscript type for original and resubmitted manuscripts. Withdrawn manuscripts are included in these totals and un-submitted manuscripts are not included. The Admin will see statistics for the entire journal. Editors-in-Chief (or Associate Editors, if configured) will see statistics for only those manuscripts assigned to them.

b.   **Journal Statistics**:

i.   **Average days from submission to first decision** will display average number of days from submission to first decision for all original and resubmitted manuscript. Withdrawn manuscripts will be included if the decision task is completed prior to the withdrawal. Un-submitted manuscripts and manuscripts with rescinded decision tasks are not included.

ii.   **Average Reviewer turnaround** time will measure the average time from the point a reviewer or referee agrees to review to the date the reviewer returns their review. Reviewer/referee turnaround times will be calculated and displayed separately for original, resubmitted and revised submission. Withdrawn manuscripts are included in these totals and un-submitted manuscripts are not included.

iii.   **Time to Assign Reviewers** will measure the average time from editor assignment to the time the first reviewer or referee is assigned or referee agrees to review to the date the reviewer returns their review. Time to Assign Reviewers will be calculated and displayed separately for original, resubmitted and revised submission. Withdrawn manuscripts are included in these totals and un-submitted manuscripts are not included.

iv.   **Average days from submission to final decision** will display the average number of days from submission to final decision for all unique submissions. The original submission and subsequent revisions for any given manuscript will be counted once. Withdrawn manuscripts will be included if the decision task is completed prior to the withdrawal. Un-submitted manuscripts and manuscripts with rescinded decision tasks are not included.

    c. **Other Statistics:**

       i. **Accept Ratio** will display unique submissions with a final decision of accept divided by the number of unique submissions with a final decision. The original submission and subsequent revisions for any given manuscript will be counted once. Withdrawn manuscripts will be included if the Accept Decision task is completed prior to the withdrawal. Un-submitted manuscripts and manuscripts with rescinded decision tasks are not included.

       ii. **Total Pending Manuscripts** will display a lifetime statistic for the total number of unique submissions without a decision.

       iii. **Oldest manuscript without a decision** will display the manuscript number and number of days from submission to the present date for the oldest manuscript without a decision.

Cognos Reporting

ScholarOne Manuscripts utilizes a powerful reporting tool, Cognos reporting to allow you to run pre-defined and ad-hoc reports. Please see the guide below.

[*ScholarOne Manuscripts* Cognos Reporting Guide](#)

Publisher-Level Reporting

ScholarOne Manuscripts offers publisher-level reporting which allows clients with multiple sites to create reports which analyze data across those sites. This reporting allows the creation of classifications and custom values that can be used in the organization of submission reporting. Please review the guide below.

[*ScholarOne Manuscripts* Publisher-Level Reporting Guide](#)

APPENDIX – ADDITIONAL REFERENCE GUIDES

The following additional user guides were referenced in this user guide.

ScholarOne Manuscripts Author Guide

ScholarOne Manuscripts Editor Guide

ScholarOne Manuscripts Reviewer Guide

ScholarOne Manuscripts Email Template User Guide

ScholarOne Manuscripts Production Center Guide

ScholarOne Manuscripts Cognos Reporting Guide

ScholarOne Manuscripts Publisher-Level Reporting Guide