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Appendix I. Overview and Meaning of the Various Submission Statuses
Introduction

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

You may also find the Editor’s FAQ and our online support page helpful: the latter contains additional information, such as instruction videos and FAQs, for editors as well as for authors and reviewers. Please note that depending on your journal’s workflow, not all options may currently be available to you. Should you have any questions or wish to activate new features for your journal, please contact our EM Support Team at Support-EM@brill.com.

Publication Ethics

The publication of a manuscript in a peer-reviewed work is expected to follow standards of ethical behavior for all parties involved in the act of publishing: authors, editors, and reviewers. Authors, editors, and reviewers should thoroughly acquaint themselves with Brill’s publication ethics, which may be downloaded here.

1. Getting Started

1.1 System Access: Login

Go to your journal’s Editorial Manager website, enter your username and password in the login box and click on ‘Editor Login’. Once logged in, you will see your editor’s main menu (see section 3), from where you can take action as and when necessary.

1.1.1 Retrieving and Resending Access Codes

Should you have forgotten your username and/or password, click on Send Login Details in the login box. On the next page, enter your email address and click on ‘Send Login Details’. You will then receive an email with your username and a link through which you can create a new password. Please note that passwords should contain min. 8 characters and should be alphanumeric. If you are unable to log in, please contact Support-EM@brill.com.

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

1.1.2 Login via ORCID

ORCID provides a unique personal identifier that links your name unequivocally to your publications. More and more publishers are including these unique identifying codes in the final publications and thereby help you get credit for your work. You can for instance set your ORCID record to be updated automatically with all publications that contain your ORCID iD and share your publications list with your institute and/or funders. You can also use your ORCID access codes to log in to Editorial Manager websites and possibly other systems like publisher platforms. For more information about ORCID, see https://orcid.org. Brill expects to be able to include ORCID iDs (in so far available) in online publications in the course of 2018. If you need help getting your ORCID profile set up, please check the ORCID knowledgebase or contact ORCID Support directly at support@orcid.org.
You can choose to log into EM using your ORCID access codes by clicking on the green ORCID ‘iD’ symbol in the login box.

If you do not have an ORCID iD yet: Create an ORCID iD via the Register Now link on the ORCID page, fill out the required fields, confirm you are not a robot and click on ‘Register’. Then click on ‘Authorize on the following page.

If you already have an ORCID iD: simply sign into ORCID and authorize Editorial Manager.
Once you have authorized EM on the ORCID page, you will automatically go back to Editorial Manager, where you should then log in with your Editorial Manager login codes (in order to connect your ORCID iD with your Editorial Manager account). This only needs to be set up once. Next time you log in, simply click on the ORCID iD symbol, fill out your ORCID access codes and sign into ORCID – this will automatically log you into your EM main menu.

NOTES:

➢ If you are logged in as an Author by default, click on Update My Information at the very top of the EM page, select your editorial role from the ‘Default Login Role’ drop down menu and click on ‘Submit’ at the bottom of the page. Next time, the system will log you in as an editor.

➢ To switch to your editorial main menu without logging out and logging in anew, open the ‘Role’ drop down menu to the right of the Journal title at the very top of the page and select your editorial role.

1.2 Menu Bar and Navigation

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

- **Home:** This leads to the EM homepage where you usually log into the system and there you can for instance access this Editor’s Manual.

- **Login/Logout:** Logout allows you to exit the system. When you are in proxy mode (see section 2.2.2), click on this link once to exit proxy mode and return to your own account. Login leads to the login page.

- **Help:** This opens an extensive Help feature in a new window. Here you can find detailed instructions on how to perform all possible actions in the system. The EM homepage also includes direct links to BRILL’s EM resources (a.o., this editor’s manual).

- **Register:** Register is intended for new users who wish to create an account. Registration need only be done once. Editors can disregard this link. Should you wish to add someone to the database, use Register New User instead (see section 1.3).

- **Update My Information:** After login, this is where you can make changes to your own account (update your contact information, change your username/password, etc.).

- **Journal Overview:** This opens the Publisher’s homepage of the journal.

- **Contact Us:** This opens a new email to the editor(s).

- **Submit a Manuscript:** Please disregard this link.

- **Instructions for Authors:** This link opens the Instructions to Authors as published on the Brill website.

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1 Label changes depending on whether or not you are logged in.
Register New User: Adding People to the Database

1.3 Register New User is available at the very bottom of your Editor Main Menu and allows you to add new people to the database. Click on the link, enter the requested information (Email Address, Given/First Name, Family/Last Name, Title and Country). If you wish to enter more contact details, click on the ‘+’ symbol in front of ‘Enter More Contact Information’. When ready, click on ‘Register User and Send Letter’. You can edit the accompanying letter before it goes out. The user will then receive an email with their access codes. Registering new users can also be done via Search People (see section 2.2) and when you are inviting referees (see section 3.3.4).

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

1.4 System Emails

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

2. Search Functions

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

2.1 Search Submissions: Searching for Manuscripts & Adding Quick Search Links

Via Search Submissions you can look up all the manuscripts that are in the system based on a variety of search criteria. By default, the system searches on manuscript number. You can, however, also conduct manuscript searches on authors’ names, article titles, article types, etc. All you need to do is change the ‘criterion’ in the drop down menu (opens a drop down list in EM) on the left before executing your search. In the value field (on the right) you can fill in

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4 All authors and reviewers (as well as editors) who need to do something (e.g., submit a manuscript, submit a review, etc.) will need an account in EM. This account will only need to be created once.

5 Only if you are the editor who receives these directly from the author.
the exact information to be searched (e.g., the actual author's name). Make sure that the type of information you enter as 'Value' matches the type you selected as 'Criterion' (e.g., to look up a paper by the author's last name, make sure to select for instance, ‘Any Author Last Name’ from the drop down menu). Execute the search by pressing ‘Search’ or use the ‘Enter’ key on your keyboard. You will then get a list with all manuscripts in the system that meet your search criteria.

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

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

NOTES:
➢ For a list with all manuscripts in the system, set the search criterion to ‘Corresponding Author Last Name’, enter a single space into the ‘Value’ field and execute the search.
➢ If the search value you entered may or may not contain special characters (e.g., ‘ì’, ‘é’, ‘â’), please replace those ‘potential special characters’ with a percentage sign (‘%’; e.g., ‘Garc%a’); the system will then list all possible variations in the search results.
➢ Not all editors are allowed to search all submissions in EM. If you only have permission to view manuscripts that were actually assigned to you, those will be the only manuscripts you can find via Search Submissions.

2.2 Search People: Access to Information about Authors, Reviewers, Editors & Proxy Option

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

2.2.1 Access to Contact Information, Notes, etc.
All personal names in the search results are in fact clickable hyperlinks. Click on a link to access that person’s database record. You can then view and, if needed, send that person their login codes, or update the information about that person, e.g., contact details, reviewer access (reviewer role drop down menu at the top), and any confidential editorial notes about that person ('People Notes' at the bottom). Anything entered into the 'People Notes' text box at the bottom of this page will also be visible when inviting referees (see section 3.3.1). Click on 'Submit' at the bottom of the page to save any changes.

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

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

If any of the role names on the right are highlighted in yellow (as shown in the screenshot above), this means that you can 'proxy' for that person in that particular role: Click on the relevant role (e.g., 'Reviewer') to enter the system for that particular person in that particular role. For instance, by clicking on someone's reviewer role, you will enter that person's reviewer menu and can then see and do exactly what that person can if he were to log on him-/herself. This proxy mode can be very helpful when you need to help someone, e.g., submit a review for a reviewer. While in proxy...
mode you see a yellow banner at the top of the page, specifying for whom you are proxying. To exit proxy mode and return to your own account, click once on log out at the very top of the page (directly underneath the journal title).

**NOTES:**
- You can also proxy via the Details action link of any manuscript, in which case simply click on the 'Proxy' text next to the name of the person you want to proxy for (author, editor, reviewer).
- If you first need to create an account (e.g., you need to upload a ms on behalf of a new author), you can enter proxy mode immediately after registration of the new user (see also section 1.3).

### 2.2.3 Merging Duplicate Accounts

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

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

#### 2.2.4 People Flags

The system provides so-called ‘people flags’ which are symbols that can be triggered for display next to someone’s name. These flags can be used for a variety of purposes, for instance to indicate that someone is a star reviewer. To (de)activate a flag for a user, simply click on the flag symbol (✓) next to someone’s name and in the flag overview, (un)tick the boxes as appropriate and ‘Submit’.

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[9]  
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3. Editor’s Main Menu (General Structure, Action Folders and Action Links)

Your Editor’s Main Menu allows you to keep track of all papers under consideration for your journal and will indicate whether and what type of further action may be required. Your menu consists of several sections, each listing a number of action/status folders (the most important of these are described in the sections to follow and highlighted in the screenshot below).

If there are manuscripts for which the status described in the main menu applies (e.g., New Assignments, Submissions Requiring Additional Reviewers), the folder name will become a hyperlink and the number at the end will show how many manuscripts the folder contains. Click on the link to see the manuscripts, get access to more detailed manuscript information and take action where necessary. The main menu is color-coded: traffic light colors show whether or not the manuscripts in specific folders may be problematic (green = no problem; orange = needs attention; red = late). The colors change if a manuscript is set at a status for more than an x number of days: by default, after 10 days in that same status, the color changes from green to orange, and 10 days later it changes to red. Of course, as the editor, you are the one to decide whether or not a manuscript indeed needs further action. Should you wish to finetune the number of days for these color changes, please contact EM Support. We can update this at the editor's request.

You will also receive automated editor reminders that use the same color coding as described above. These emails are sent once every two weeks and only if the folders included in the reminders contain manuscripts requiring action from you. For these reminders as well, please contact EM Support if you wish to change the frequency, or wish to have these turned off completely. They are intended to help you with your editorial tasks, so if they rather annoy than help, please do not hesitate to get in touch.

Throughout EM, the manuscripts (‘submissions’) are shown in a table (one manuscript per row; the various columns give more information about the individual manuscripts). On the left hand side, each manuscript has an ‘Action’ column. The ‘action’ links give you access to more detailed information about the manuscript (e.g., Details, History, View Submission) and/or allow you to take specific action on the manuscript (e.g., Assign Editor, Invite Reviewers, Submit Editor’s Decision and Comments, Set Final Disposition). The most important action folders and action links are described in more detail in the sections below.
You can change the look and sorting order of any manuscript table at any time and as often as needed. Click on one of the triangles in any column header to have the manuscripts sorted by the information displayed in that particular column (e.g., by status date in ascending/descending order).

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

On more and more pages, the overview table may look slightly different than you were used to before. This new page style allows you to customize the overview even further: The settings symbol ( ); above the manuscript table on the right) allows you to make changes to the various columns that are displayed on the page (add/delete columns): simply tick/untick checkboxes as appropriate and click on ‘Submit’ to save your changes.

You can also change the order of the columns: hover with your mouse over the column header you want to relocate until you see a drag-and-drop symbol ( ). Then press and hold your mouse button, and simultaneously move your mouse sideways to move that column to another location in the overview. Whilst you are pressing the mouse button, the name of the column you are relocating will be shown in a yellow popup and arrows indicate where the column will be inserted if you would release your mouse button at that point. If you prefer the old-style overview, click on the toggle symbol ( ) at the top left.

NOTES:
➢ Depending on your journal's workflow, you may not have all of the links described in the sections to follow.
➢ The available action links and status columns may vary per status folder.
3.1 New Submissions Requiring Assignment / Direct-to-Editor New Submissions

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

3.1.1 Spotting Potential Ethical Issues: Duplicate Submission Check, Author Details, Green ‘D’, iThenticate Similarity Check

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

3.1.1.2 Green ‘D’ and Author Details
If you see a green ‘D’ (D) displayed behind the author’s name in the manuscript table, this indicates that the author has submitted one or more other papers via your journal’s EM site within the last 365 days. Clicking on the author’s name will open a new window providing a short overview of the author’s details, any editorial notes about that person as well as a list with all papers submitted by this person with this account.

3.1.1.3 iThenticate Similarity Check (Plagiarism Check against the CrossRef Database)
For a large set of Brill’s journals, we have activated the iThenticate Similarity Check. This will automatically check the Reviewer PDF of all newly submitted papers against a large set of already published papers made available by a variety of publishers as well as a number of online sources and will make a report available to you within EM so that you can assess whether there may be problems with the manuscript in terms of plagiarized text, images, or data.

If the feature is active on your EM site, you will find an action link called Similarity Check / iThenticate Results through which you can access the report: in the pop up window, when the report is ready, it will show as Completed in the ‘Report Status’ column and you can click on Completed to access the report.

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4 If for your journal papers are divided automatically between two or more editors, the link is called Direct-to-Editor New Submissions.

5 If you have an assistant or Managing Editor who usually does this initial check and only sends you the manuscripts after the check, (s)he will be the one with the New Submissions link in his/her main menu.
For detailed guidance on how to interpret a similarity check report, please contact your journal’s Acquisitions Editor.

For submissions that were already in the system before this feature was activated, you can still choose to trigger this similarity check manually as follows: Click on the File Inventory action link at the top of the page and click either of the two similarity check buttons at the top of the page to have the files of your choosing checked (if you want to use the option where it sends in selected files, you first need to tick the boxes in front of the files you want to send in and then press ‘Similarity Check: Selected Files’).

If the feature is not yet active for your journal, and you wish to have this activated, please contact your Acquisitions Editor. If you encounter any actual ethical problems with a paper and need further guidance, you may also wish to consult Brill’s publication ethics and/or contact publicationethics@brill.com for more detailed advice.

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

The Reviewer PDF is the version that the reviewers get to see and tends to include less information than the Author/Editor version (e.g., the latter may include a cover letter that is excluded from the Reviewer PDF). Please check whether all required elements are there and in case your journal has double-blinded peer review, whether the reviewer’s PDF is properly anonymized. Note that the Editor’s PDF will often contain more information as for instance a cover letter or separate title page is usually excluded from the Reviewer PDF. If anything is missing or if the author needs to attend to other technical points, you can return the submission to the author’s main menu via Send Back to Author (see section 3.1.7 below).

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

3.1.3 Manuscript Details: General Manuscript Information and Status
Click on Details for an overview of all sorts of information about that particular paper, including an option to store confidential editorial notes, current status of reviewers and editors associated with the ms as well as the option to proxy for authors/reviewers/editors connected to that ms.

3.1.3.1 Editorial Notes and Submission Flags
Use the ‘Manuscript Notes’ text box (about halfway down the Details page of the manuscript) to insert important editorial notes about the manuscript (e.g., extensions granted to reviewers). Adding your initials and date at the end
of your comment between brackets (e.g., '[MJ, 8 MAY 2013]') will allow you to easily reconstruct afterwards who made the comment and when and determine whether it is still relevant. Before saving the changes, tick the 'Display Manuscript Notes Flag' check box directly above the text box. Click on 'Save and Close' at the bottom or top of the page to save your changes.

There will be a red triangle ('flag') shown next to the Details action link signifying that there are editorial notes saved for the ms. When the notes are no longer relevant, untick the 'Display Manuscript Notes' checkbox and save the changes. The red triangle will then disappear. Notes can be used for all kinds of purposes, e.g., suggesting referees to another editor, a note to yourself to ask the author to fix their references when you send it back for revision, a note that there may be ethical concerns, etc. These notes are only visible to editors.

When you are ready to accept a manuscript and have notes for the Production/Desk Editor at Brill, please enter these into the 'Production Notes' text box. This text box is available on the Details page of the manuscript (below Manuscript Notes), on the page where you submit your decision (see section 3.3.3) and on the Transmittal Form (see section 3.3.3.3).

In addition to the default red triangular flag, there are a number of additional, special purpose ('custom') flags available that can be used to quickly flag a manuscript for a specific purpose (e.g., 'Copyediting in progress') without having to make detailed comments.

To display a custom flag, click on the grey flag symbol (✔️) next to Details, tick the box(es) in front of the flag(s) you wish to display and click on 'Submit'. These flag(s) will then be displayed next to the Details link. To remove flags from the manuscript, simply untick the boxes and 'Submit'. If you hover over a custom flag with your mouse, a mouse-over text will indicate what the flag stands for. If you want new (currently unavailable) flags activated for your journal, please contact EM Support.

3.1.3.2 Co-Author Verification
EM automatically sends a request to any co-authors listed as soon as a manuscript is submitted to the editor. Through a link in the email, the co-author(s) can confirm or deny their contribution to the manuscript and if desired, connect their ORCID id to the submission. This verification step does not interfere with the workflow in Editorial Manager, so should not cause any delays. You can always proceed with the manuscript without the co-authors having confirmed their co-authorship. To view the confirmation status and/or resend the request to the co-authors, click on the Details link of the manuscript and then on Author Status in the 'Other Authors' section.

This opens up a new page where you can see whether the co-authors have responded and if so, what their response was ('Yes' means that they confirmed being a co-author; 'No' that they denied co-authorship). Resend Letter allows you to resend the email requesting their confirmation of authorship to an individual reviewer. Via the 'Send Letters' button you can resend the email to all co-authors who have not yet responded in one go. If a co-author made the wrong
choice and asks you to correct it, you can use Reset Confirmation Status next to their name and then Resend Letter so that they can update their choice online.

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

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

3.1.5 File Inventory: Access to Manuscript Source Files and Companion Files
File Inventory gives you access to the source files (e.g., Word files) provided by the author. The labels shown in the ‘Item’ column determine whether or not that particular file will be shared with the referees. Item types ‘Biographical Note’, ‘Title Page’, ‘Cover Letter’ and ‘Supplemental’ are generally not included in the reviewer’s version of the PDF. All
other item types are visible for the referees. The PDF generated and visible for the editors always contains all source files. The ‘Description’ column shows the labels as included in the PDF file for the related contents.

If your journal uses double-blind peer review, please check this page carefully to ensure that the various files have been uploaded with the correct item type and that the contents of the files that will be shared with referees do not include any clues regarding the identity of the authors.

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

NOTES:

➢ Edit Submission is only available while the manuscript is in the hands of the editor, not when the manuscript is in the hands of the author for revision, or once a final decision (accept/reject) has been submitted.

➢ [For journals with double-blind review]: When you are at the end of the process and wish to upload a final edited version of the manuscript that should be used for typesetting, you are welcome to upload a complete, non-anonymized version of the manuscript (referees no longer have access to the manuscript PDF after submission of their review). In such cases, use the ‘Manuscript (Anonymized)’ item label and retain the separate ‘Title Page’ document.

➢ When you make changes to the source files of the manuscript, please remove the original versions of those files in order to avoid confusion.

➢ Any Incomplete Submissions or Waiting for Approval links in your main menu are related to the Edit Submission process and contain manuscripts that require further action. If you do not know why the manuscript was edited in the first place, choose Revert Submission. This reinstates the PDF that was available in the system before you started the Edit Submission process. Edit Submission allows you to go back in and finish the changes. Approve Submission releases the updated PDF version and permanently overwrites the previous version.

3.1.6.1 Edit the Submission Data Only: Updating General Manuscript Information
This is the quickest option as you will not need to rebuild the PDF of the submission. Here you can make changes to the general manuscript information (metadata/submission data) that is displayed directly on the website, for instance in the manuscript table or on Details (e.g., article title, authors’ names, keywords, abstract, etc.). The buttons on the left hand side allow for quick navigation: Click on the name of the section you wish update and make the required changes. To save your changes, first click on ‘Attach Files’ on the left and then on ‘Submit’ at the bottom of the ‘Attach Files’ page.

NOTE:

➢ Changing the Article Type may affect the answers given by the author in the ‘Additional Information’ section. It is therefore advisable to make a copy of the original author’s answers before changing the article type.
3.1.6.2 Edit the Submission (and Rebuild the PDF)

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

Scroll down: Download those source files that need to be updated (note: if you do not want to make immediate changes to the submission in EM, it is better to download source files through the File Inventory action link; see section 3.1.5). Edit the file(s) where necessary and save them to your desktop.

![Image of file management interface]

Then first remove the original files from the submission: tick the ‘Select’ checkbox(es) for the corresponding files and click on ‘Remove’. You will then need to upload the edited versions: For each file, select the appropriate ‘item’ type (e.g., manuscript, title page, figure, etc.) from the drop down menu and change the description if necessary. Via ‘Choose Files’ you can select the appropriate file and attach it either by double clicking on the file name or dragging it to the ‘Drag and Drop Files Here’ area on the ‘Attach Files’ page. The file will then appear in the list with attached items at the bottom. When all replacement files have been uploaded, rebuild the PDF by clicking on ‘Next’, ‘Next’ and ‘Build PDF for my Approval’. The manuscript can now be found in Submissions Needing Approval by Editor in your main menu.

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

3.1.7 Send Back to Author: Asking the Author for Technical/Stylistic Edits

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

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

NOTES:
➢ Send Back to Author is only available while the submission is in (Direct-to-Editor) New /Revised Submissions Requiring Assignment.
➢ If you want the author to revise the content of the manuscript and you want to compare the revised version with the previous version, you will need to submit a formal decision (Assign to yourself and Submit Editor’s Decision and Comments (see sections 3.1.9 and 3.3.3) instead of using Send Back to Author.
3.1.8 Remove Submission

While in (Direct-to-Editor) New Submissions Requiring Assignment you can remove the submission from the system. This option need only be used in rare cases (e.g., the same paper submitted multiple times). Once assigned to an editor, you can no longer remove the submission. When you need to deactivate a manuscript at a later stage, set the final disposition to ‘withdrawn’ instead (see section 3.3.3).

NOTE:
➢ If you want to formally reject a manuscript, do not remove the submission but instead first assign the paper to yourself (see section 3.1.9) and then submit an official decision (see section 3.3.3).

3.1.9 Assign Editor/Assign to Myself

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

NOTES:
➢ For workflows with multiple editors where new submissions are divided automatically between the various editors, you will always need to assign the manuscript to yourself first (Assign to Myself). After that you can send the paper on to another editor for further processing via the Assign Editor link. See also section 3.1.9.3 on redirecting a paper to another editor.
➢ For workflows with multiple editors: If some or all decisions of subordinate editors (e.g., Associate Editors) need to be formally approved by another editor (e.g., Editor-in-Chief) and that other editor needs to submit a formal decision him-/herself at the end of the process, all new papers should first be assigned to that editor. After that the paper can be assigned on to another editor if desired. The last assigned editor will be the Handling Editor who will send the paper for review. When ready, the Handling Editor submits a decision. Depending on whether that type of decision needs to be ‘approved’, the Handling Editor should notify the author himself OR the manuscript will be returned to the other editor, who should then submit his/her own decision and notify the author (see section 3.3.3 on submitting decisions).

3.1.9.1 Assign Editor in Batches

If you have multiple papers that you want to assign to the same editor, you can do so by use of the ‘Batch Assign to Editor’ button in the top left corner of the main menu folders New Submissions Requiring Assignment, Revised Submissions Requiring Assignment, and New Assignments. This will allow you to assign all of the selected papers to that editor in one go:

1. Click on ‘Batch Assign to Editor’

2. Tick the boxes for those papers that you wish to assign and then click ‘Proceed’. 
3. Select the editor you want to assign and click on either ‘Send Custom Letter’ (if you want to edit the letter to the editor before sending) or ‘Send Default Letter’ (if you just want to send the template letter). The latter option will immediately send the standard letter – the custom option will allow you to first view and/or edit the letter and then send out the edited version.

3.1.9.2 Unassign Editor: Cancelling Editorial Assignments and/or Replacing Handling Editor

Use Unassign Editor to cancel an editorial assignment, change the handling editor of a manuscript or make changes to the editors involved in the ‘Editor Chain’ of the manuscript. With the rubbish bin (trash) symbol you can delete an editor from the list of assigned editors (the bottom editor is the handling editor). To replace one editor with another, use the ‘role’ and ‘new editor’ drop down menus. The ‘New Editor’ menu shows the available editors that have the editorial role shown under the ‘Role’ drop down menu. If the editor you want to assign it to is not listed under ‘New Editors’, you will need to change the role selection in the ‘Role’ menu to match the role of the editor who you want to reassign the paper to. If you have no rubbish bin, the manuscript is likely under review and you cannot delete the editor assignment. You will then need to replace the editor with another editor.

To execute the changes either click on ‘Confirm Selections and Send Default Letters’ or ‘Confirm Selections and Send Custom Letters’. These buttons are greyed out until you have made actual changes to the editor’s list. The first option
sends standard letters to editors that have been removed and added to the ‘Editor Chain’. Use the other (‘custom’) option if you want to edit the associated letters (or want to avoid sending any of the letters).

3.1.9.3 Transfer Pending Assignments to Other Editor in Batches
If you need to redirect a paper from one editor to another, you can of course use the Unassign Editor option as described in section 3.1.9.2 above. However, if you have multiple papers that you need to transfer to another editor you can also use the option to transfer pending assignments. Note that you can only assign papers from one editor to the other in this way if both editors have the same editorial role in the system. Should you need further assistance with rerouting assignments from one editor to the other, please do not hesitate to contact EM Support.

To transfer papers:

1. Go to Search People and look up the editor from whom you wish to transfer the papers.
2. Click on the Editor's name in the search results on the left.
3. On the next page, in the ‘User Information’ section at the top of the page, click on ‘Transfer Editor Assignments’.
4. Tick the boxes for the papers that you wish to transfer to the other editor and then click on ‘Proceed’.
5. On the next page, select the editor you wish to transfer the papers to from the drop down menu in the ‘New Editor’ section (the box will appear blank until you have actually selected an editor). If you want to edit either of the letters, click customize next to the appropriate letter, edit and click ‘Submit’ to save your changes and return to the screen shown in step 4. If you wish to do the transfer without sending the connected letter(s) click the ‘Do Not Send’ box next to the letter that you do NOT want to send. Should you have selected a long list of papers and discover during this step that one or more of these should actually NOT be redirected, tick the ‘Do Not Assign’ box for those assignments in the overview at the bottom – those papers will then NOT be reassigned when you confirm the transfer.

6. Once you have set up everything as desired, click the ‘Proceed’ button at the bottom of the page to confirm. This should then lead you to a statement confirming that the transfer was successful and you can navigate back to your main menu from there.
3.1.10 Redirect to Other Editor

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

**NOTE:**

➢ This option is not available after a paper has been assigned to an editor and is only available if you find the manuscript under **Direct-to-Editor New Submissions** or **Direct-to-Editor Revised Submissions**.

3.1.11 Sending Ad Hoc Emails

**Send Email** allows you to send ad hoc emails that are not connected to any specific action in EM, for instance a query to an author. You can attach files to these ad hoc emails, which will then be sent as regular email attachments. These can be files already stored in EM (e.g., manuscript source file), or files from your pc. Click on **Send Email**, select the appropriate letter from the drop down menu, fill in an email address (if necessary) and make changes to the letter where appropriate. EM now has an auto-fill option for the ad hoc letters, similar to what is available in MS Outlook, so if you regularly send ad hoc emails to the same person, and manually add the email address, at one point, EM remembers the email address and will suggest it when you start typing it in. To attach files, click on ‘Add/Change Attachments’ and on the next page select the files that you wish to attach.

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

**NOTES:**

➢ If no files are visible below ‘Add Files from Submission Inventory’, click on the ‘+’ in front of the section header. This will then change to a ‘-’ and you can then see and select the various files available in EM.

➢ When selecting files for attachment make sure that the total file size of the attachments is no larger than 4-5 MBs. Otherwise, you run the risk of the email not being delivered to the recipient.

➢ Should the file attachment option be missing, please contact **EM Support**.

➢ These ad hoc emails are comparable to emails that you would send via your own email program: they do not interfere with the workflow in EM, and do not formally count as action taken (e.g., if you send a decision letter via **Send Email**, EM does not recognize this as a formal decision [decisions should rather be submitted using **Submit Editor’s Decision and Comments**]). As sent via EM, a copy of these emails is automatically saved into the correspondence archive under **History**.
3.1.12 Linked Submissions: Creating Groups of Manuscripts

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

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

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

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

NOTE:
➢ If you need to approve of some or all decisions of other editors, you always need to assign the manuscript to yourself first. Then, if need be, you can assign it on to another editor for further handling. If you forget to assign the manuscript to yourself first, the papers will still be returned to you for approval (and author notification), but you will then find them in another folder in your main menu (All Submissions with Editor’s Decision instead of All Submissions with Required Reviews Complete) and you will not need to take a separate decision yourself. Instead, you will need to Notify Author and will still have full control over what goes to the author: before actually sending the letter, you can still change the decision type and edit its contents if needed.

3.2.1 Authorship Changes Alert
While the manuscript is still in (Direct-to-Editor) Revised Submissions Requiring Assignment, the system shows an alert symbol (▲) next to the Details action link of the manuscript if there have been any changes in authorship compared to the previous version of the manuscript. To see more details about exactly how authorship has changed, click on Details, and in the ‘Other Authors’ section on Author Status. The Author Status page shows you whether authors were added, removed, now appear in a different sequence, etc.
3.3 New Assignments

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

NOTES:
➢ Access to the Assign Editor option depends on your journal’s workflow and your editorial role.
➢ Once you have assigned a paper to another editor it disappears from your ‘Editor ‘To-Do’ List’. Should you need to ‘approve’ the other editor’s decision (i.e. submit your own decision and/or notify the author), the manuscript will appear in either Submissions with Required Reviews Complete (see section 3.4) or All Submissions with Editor’s Decision (see section 3.12) as soon as the other editor has submitted a decision.
➢ If a paper that has already been sent for review is redirected to you for further handling, the manuscript will not turn up in New Assignments, but will instead pop up in whichever status folder applies for the manuscript. If you are having trouble locating a specific manuscript in your main menu, you should always be able to find it via Search Submissions.

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

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

Click on the Invite Reviewers action link of a manuscript to go to the ‘Reviewer Selection Summary’ page. Any reviewers already associated with the manuscript are shown on this page in the ‘Selected Reviewers’ section. A current status is displayed next to each reviewer (e.g., ‘invited’, ‘agreed’, etc.). For reviewers with an invited/agreed status you will also have an Un-invite or Un-assign option that allows you to cancel the assignment (see also section 3.3.1.2). If no reviewers have been invited to date, the ‘Selected Reviewers’ section will not show any reviewer names.

The ‘Review Settings’ section shows how many reviews are required for this particular article. You can change the number of required reviews at any time by clicking on Change; simply change the number and click on ‘Save and Close’. This number determines when the manuscript pops up in your main menu as requiring action: Submissions with Required Reviews Complete (= take decision or invite more reviewers if necessary); Submissions Requiring Additional Reviewers (= invite more reviewers or change the number in the Review Settings to reflect the correct number of required reviews).
To invite reviewers, click on ‘Go’ in the ‘Reviewer Search’ section. If necessary, change the search criteria in the drop down menus before clicking on ‘Go’. You can for instance search for classification matches, for reviewers suggested by the author, or search the entire people database, rather than only the reviewer database.

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

If the person you searched for does not show up in the search results, you can register and invite them via Register and Select New Reviewer (available both at the top and the bottom of the page). In that case, you first need to register the person and send the connected registration letter. After that, the newly registered reviewer is shown in the search results, and you can proceed with inviting them as explained below.

In the search results, tick the ‘Inv’ box for those people you wish to invite immediately and the ‘Alt’ box for those you want to use as alternate reviewers. Scroll down and click on ‘Proceed’.

On the next page, (if desired) you can select a different invitation letter from the drop down menu, customize (i.e. view and/or edit) the individual letters and/or amend the number of days the reviewer gets to review the paper. Click on ‘Confirm Selections and Proceed’ to send out the invitation letters and add those reviewers selected as ‘Alternate Reviewers’ to the ‘Alternate Reviewers’ section. The default invitation letter is ‘REVIEWER: Invitation to Review’, but you have two other letters available as well, both intended for revised manuscripts: In case of a revised manuscript, it usually avoids confusion if you alert the reviewer that this is a revised version of a manuscript they may or may not have reviewed before.
NOTE:
➢ Depending on your workflow you may or may not be able to invite reviewers.
➢ You cannot invite reviewers if the manuscript has not yet been assigned to an editor.
➢ All reviews and editorial decisions (if any) can be accessed via the View Reviews and Comments action link.
➢ Book Reviewers are considered authors in EM because they submit a book review, which is intended for publication in the journal. EM sees reviewers (or referees) as people who are asked to advise the editor as to whether or not a paper is suitable for publication in the journal. This advice is not published in the journal. For more information on how to solicit book reviews, see section 4.
➢ For changes to template letters, or adding new letter variations, please contact EM Support.
➢ Do not use the Solicit Commentary action link for soliciting reviews; this link is intended to obtain a commentary (from an expert in the field) on a manuscript eventually to be published together.

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

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

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

3.3.1.2 Changing Review Deadlines
For each review assignment, the system will automatically calculate a deadline. There are default deadlines in the system and these may differ per article type. Review deadlines are calculated from the moment the reviewer actually agrees to review. As an editor, you have full control over these deadlines, and can amend them at any time:

- Before you send the actual review invitation, you can change the number of days to review that is shown for each reviewer you selected (simply type in the number of days you would like to give this reviewer):
- If you do not want to update the system deadline (for instance, so that the system will continue to show it in the reminder reports for the time being), you can choose to simply make an internal editorial note that you have granted an extension to Reviewer X until date Y. Such notes can be added via the details action link of the manuscript, in the field ‘Manuscript Notes’ that you find about halfway down the page. For more details on adding notes, see section 3.1.3.1.

- When the reviewer has already been invited, and perhaps has already agreed, you can also change the deadline via the details action link for the manuscript. If you scroll down to the bottom half of the details page, you will see all reviewers associated with the submission and can simply overwrite their deadlines. If the status is still invited, you can change the number of days the reviewer will get upon agreement. If the reviewer has already agreed, you can change the actual due date. Please do not forget to save your changes when done.

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

3.3.1.4 Editing Completed Reviews
If a reviewer indicates that further changes are needed to their review after completion (or if you need to edit a completed review yourself), you can look up the manuscript and then via View Reviews and Comments access the review that needs editing (click on the short review recommendation next to the reviewer’s name). At the top of the individual review page, click on Edit Reviewer Comments and ‘OK’. You can then make any changes that are needed and save these by clicking on ‘Save and Close’.
You can also choose to return the review to the reviewer so that the reviewer can edit the review themselves and resubmit when done. This option is not available for all journals; if you would like to have this option switched on, please contact EM Support.

Once activated, only the Handling Editor and the editor who did the initial editor assignment will have the option to ‘Re-open Review’ if they open the individual review via View Reviews and Comments. Note that reviews can no longer be reopened once a decision has been started or submitted.

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

Via Attachments you can upload extra files for a paper, for your own or other editor's reference, or to share with the author. This link can be accessed in various locations:

- Via the Details action link (top half of the page):

- Via the View Reviews and Comments action link:
All of these links lead to the ‘Attachments’ page. Here you can upload your own file(s), make changes to any review attachments and indicate which attachments should be shared with the author. Attachments will NOT be shared with authors unless you actively grant them access (tick the ‘Allow Author Access’ checkbox to the right of an attachment to grant the author access) and will then not be accessible to the author until after you have sent the decision letter.

Click on ‘Upload Attachments’ to add new files. This will open a new window. Here you enter a description for the file you want to upload. Select the relevant file from your desktop via ‘Browse’; click on ‘Open’ to confirm your selection. Then (if you wish to share the file with the author) tick the ‘Allow Author Access’ checkbox and click on ‘Attach This File’.

A new section will appear at the bottom of the page, entitled ‘Attachments’.
To upload multiple files, repeat the steps above until all relevant files have been uploaded. When ready, click on ‘Proceed’ at the bottom of the page. This leads you back to the main ‘Attachments’ page. This should now contain an overview of all attachments uploaded for the manuscript. Click on ‘Save and Close’ to close the page.

If the file attachment you want to share with authors and/or reviewers should be anonymous (e.g., files supplied by referees), please make sure that the document properties of the file do not contain any clues as to the document author’s identity and that the name is not included in the text of the document or in the file name. If needed, you can upload a new anonymized version using the Upload Revised File link and then choose to share that version with the author instead of the original. EM automatically anonymizes the document properties of PDF and MS Office files, but not for other file types. This cleansed version is available as ‘Sanitized Copy’ and that is the version that (if shared) will be accessible to the author. Note that the ‘Description’ and ‘File Name’ are also visible to authors and reviewers (if granted access to the attachment). If an attachment was uploaded by a reviewer, authors and reviewers will only be able to see ‘Reviewer 1’, etc. in the ‘Uploaded by’ column.

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

Any attachments uploaded by editors and/or reviewers can be accessed via the Attachments link (see also section 3.3.2). On the ‘Attachments’ page, you can indicate which attachments (if any) should be made accessible to the author and/or reviewers and you can also upload attachments of your own.

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

NOTES:
➢ Should you have made a decision in error, the decision can be undone through the Rescind Decision action link (see section 3.3.3.2).
➢ For accepted manuscripts you also need to Set the Final Disposition to ‘Accept’ to finalize the process and send the manuscript over to production at Brill (see section 3.3.3.3). You can only do this after having sent the decision letter to the author.
➢ Any copyediting needs to be taken care of before you submit the final accept decision in EM and send the accompanying decision letter. The ‘Accept’ decision label means that neither the author nor the editors need to make any further changes.
3.3.3.1 Notify Author: Sending the Decision Letter to the Author

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

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

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

When ready, click on ‘Send Now’ – the letter will be sent immediately.
NOTES:
➢ If the formal decision letter has not been sent, you will find the paper in All Submissions with Editor Decisions (bottom half of main menu; see also section 3.12). The submission will have a new action link: Notify Author, through which you can (and should) send the decision letter as shown above.
➢ The decision letter must be sent as otherwise, the next step cannot be taken: The author will not be able to upload a revised version; or, if accepted, you cannot set the final disposition (see also section 3.3.3). The latter is crucial as this is how you send the accepted paper to the Production Editor.
➢ Any copyediting needs to be taken care of before you send the official accept decision letter. The ‘Accept’ decision label means that neither the author nor the editors need to make any further changes.
➢ If desired, we can also activate the option to notify reviewers about one or more decision types. When activated, this involves an extra step that is automatically triggered as soon as you have sent the decision letter to the author. At that point, you can still edit the notification to the reviewer and even decide not to send it at all. For more information and implementation, please contact EM Support.

3.3.3.2 Rescinding a Decision
As soon as a decision has been taken, a new action link will become available: Rescind Decision. This link allows you to undo your decision if it was taken in error. If you rescind a decision before having notified the authors, choose ‘Rescind without Sending Letter’. If you have already notified the author about your decision, however, please rescind your decision using ‘Send Custom Letter’ (to view/edit the letter) or ‘Send Default Letter’ instead: this informs the author that the decision they received was taken in error and should be disregarded.

NOTES:
➢ Not all editors have permission to rescind their decision. In such cases, please contact the Editor-in-Chief or Editorial Office, or contact EM Support to have your decision rescinded.
➢ Once you have set the final disposition to ‘Accept’, it is no longer possible to rescind your decision in EM. Please contact your Desk Editor at Brill as soon as possible to put the manuscript on hold on their end.

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

This leads you into the Transmittal Form. This Transmittal Form contains manuscript information that will be emailed to the Production Editor at Brill, so please check whether the information is correct and make changes where necessary. Comments for the Production Editor should be inserted into the ‘Production Notes’ field. When ready, click on ‘Proceed’ at the bottom of the page.
The page will then refresh; scroll down and click on ‘Confirm Accept and Proceed’ at the bottom.

You will then see an overview of the letters to be sent, usually this will be at the very least the notification letter for the production editor, but there may well be one or more additional letters listed here. You can edit these letters by clicking on the letter's name (then view/edit and save your changes). When ready, complete the final disposition by clicking on 'Send' and then on 'OK'.

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

NOTES:
➢ The system requires a formal accept decision to be taken and the accompanying decision letter sent (see sections 3.3.3 and 3.3.3.1) before you can set an Accept final disposition.
➢ It is crucial that you set the final disposition to ‘accept’ after communicating acceptance to the author as this is the point where you send both the final files and general manuscript data needed for publication and content enrichment through to Brill. If the final disposition is not set to ‘Accept’ this will cause unnecessary delays and problems in the post-acceptance publication process.

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

This folder contains submissions for which the required number of reviews as indicated in the 'Review Settings' on the Invite Reviewers page (see section 3.3.1) have been submitted, theoretically making the paper ready for an editorial decision. Depending on whether you find these reviews sufficient, you can either submit a decision (see section 3.3.3) or invite more referees. If you invite an additional referee and do not wish to keep the paper in Submissions with Required Reviews Complete, simply increase the number of required reviews in the 'Review Settings' to account for the additional referee. If the number of required reviews for the submission remains unaltered, the manuscript will remain in Submissions with Required Reviews Complete and may serve as an extra reminder for you to keep an eye on the manuscript. All reviews and editorial decisions (if any) can be viewed via the View Reviews and Comments action link of the manuscript: click on the recommendation (e.g., 'Major Revision') to view the contents of the review/decision.

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

3.5 Submissions Requiring Additional Reviewers

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

3.6 Submissions with One or More Late Reviews

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

3.7 Submissions with Active Discussions

This folder contains all papers with current forum discussions and is only visible in case of pending discussions. A forum discussion can be used to discuss a manuscript amongst two or more editors. For some journals (advisory) board members can also be contacted through the discussion forum for quick advice on for instance suitable reviewers for a manuscript. If you are not yet able to contact your (advisory) board members via the discussion forum, but would like to have this option, please contact EM Support.

3.7.1 Initiate Discussion: Starting Up a Forum Discussion

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

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

Please do not use the ‘Start Discussion without Sending Letters’ option: the people you want to ask for advice will not receive any notification about this and hence are unlikely to respond! When ready, instead click on ‘Proceed to Customize Letters’. Select the appropriate letter from the ‘Letter’ drop down menu. To view and/or edit the letter's contents use Customize. Click on ‘Confirm Selections and Send Letters' to actually send the letter(s).
Then click on 'Set Flag', tick the checkbox in front of 'Discussion initiated' (☑), click on 'Submit' and then on 'Close'. When the page refreshes, you will see the 'Discussion initiated' flag (☑) displayed next to the Details link of the manuscript, which serves as a visual reminder of a pending discussion. You have now successfully initiated a forum discussion and you as well as the other participants will be notified via email as soon as any new comments are posted.

The forum can be accessed via: Submissions with Active Discussions in your main menu; Discussions action link; or via the Discussions link on the Details page. See section 3.7.2 below on how to post comments on the forum. You can start up multiple discussion threads for a manuscript if need be. Click on Discussions and then on 'Start New Topic' to create a new thread (steps are the same as when initiating a new discussion, see above).

NOTES:
➢ If desired, we can add more letters to the letter drop down menu or edit the contents of the current letters so that you can use your own version by default. Please contact EM Support if you wish to make changes.
➢ When the discussion is finished, you need to formally close it in EM in order to remove it from Submissions with Active Discussions (see section 3).

3.7.2 Participating in a Forum Discussion
If an editor needs your advice on a manuscript, you will receive an email with a direct link to the discussion forum (where you can then post your comments). Alternatively, you can access the forum via Submissions with Active Discussions in your main menu: click on the Discussion action link and then on the View link of the discussion thread you wish to open. View Submission at the top of the next page (see screenshot below) gives you access to the pdf of the submission. If granted access, you will also find links there to the File Inventory (access to source files) and View Reviews and Comments (access to reviews and editorial decisions). Enter your comments into the text box on the left and click on 'Post'. This will add them to the comments list on the right hand side, which is visible to all editors participating in the discussion. Click on 'Save and Close' to save your changes. All participants are automatically notified via email whenever new comments are posted. If you are the discussion initiator, posting additional comments works the same way.
3.7.3 Concluding a Forum Discussion
When the discussion is finished, you need to formally close it in EM in order to remove it from Submissions with Active Discussions. You can do so by first accessing the discussion (see section 3.7.2 above) and then clicking on ‘Conclude Discussion’ at the bottom of the discussion forum page. Then click on ‘Set Flag’, tick the box for ‘Discussion closed’ (☒), untick the box for ‘Discussion initiated’, click on ‘Submit’ and then ‘Close’.

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

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

3.9 View All Assigned Submissions

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

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

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

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

3.11 Submissions out for Revision

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

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

If the author asks you to extend the revision deadline, you can do so by updating the ‘Author Revision Due Date’ that is logged on the top half of the Details page (please do not forget to save your changes when done):

You can also choose to simply add an editorial note that you have granted an extension for the revision until date Y. Such notes can be added via the details action link of the manuscript, in the field ‘Manuscript Notes’ that you find about halfway down the page. For more details on adding notes, see section 3.1.3.1.

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

All Submissions with Editor’s Decision is an action folder that contains:

1. Manuscripts that still need to be sent to Brill for typesetting (required action: Set Final Disposition; status: ‘accept’; see section 3.3.3.3) and
2. Manuscripts for which the formal decision letter still needs to be sent (required action: Notify Author; status: ‘decision in process’; see section 3.3.3.1).

NOTES:
- Set Final Disposition ‘Accept’ means ‘send to production at Brill’. If this step is skipped, the manuscript will encounter all sorts of unnecessary delays and problems during the final publication process.
- If you do not send the official decision letter, the author will not be notified about the decision and will be unable to submit a revised version online: as far as the system is concerned, the paper is still in the hands of the editor and thus the author cannot make any changes to the submission. For accepted papers, you will also be unable to set the final disposition.
- This option is only available for editors with permission to view ALL manuscripts in the system.

3.13 All Submissions with Final Disposition

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

3.14 My Assignments with Decision

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

3.15 Linked Submission Groups

As indicated in section 3.1.12, you can make groups of papers (‘Linked Submission Groups’). Available Linked Submission Groups can also be accessed via Active Linked Submission Groups near the bottom of your main menu. Via Edit and View Linked Group you can view all submissions connected to that group, edit the group name, remove and add papers. The group overview also contains current status and access to general manuscript information.
3.15.1 Removing Papers from a Linked Submission Group
To remove papers from a Linked Submission Group click on the Remove from Group link(s) for the paper(s) concerned and then on ‘Submit’.

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

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

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

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

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

NOTES:
➢ The reports are by default run for all manuscripts regardless of who the Handling Editor is. If you only want to see the results for your own submissions, make sure to select your own name as Handling Editor in the drop down menu at the top of the parameter page. If you only have access to your own assignments in the system, the reports will always limit the results to your own assignments.
➢ When editing the parameters it is best to choose the option that will result in a list with all people who are X days past the deadline, rather than an option that will show everyone within a certain date range (e.g., within 30 days of their deadline).
➢ Each time you run a report, you can only send one type of reminder letter. If you want to send out multiple letter types (e.g., some authors or reviewers should get a 1st reminder, others a 2nd reminder, etc.), it is best to first run the reminder report for those reminders that make up the majority of the report and make notes of which type of other reminders there are (e.g. ms XXX, ref. XXX: 2nd reminder). Running the report for the other reminder type(s) is then much easier and quicker.
3.16.1 Author Reminders

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

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

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

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

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

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

3.16.1.3 Authors Invited – No Response Report
You can invite authors to submit a manuscript through EM (see section 4 on inviting authors) and keep track of pending invitations via Authors Invited – No Response Report on the Send Reminder Letters page. Amend the criteria as you deem fit, and click on ‘Submit’ to run the report.

You will get an overview of all invitations that meet those criteria. If the manuscript notes flag (acaktır) is shown for a paper, please check the manuscript notes via Details (see section 3.1.3.1) before proceeding: you may find relevant editorial comments in there (for instance a note about an extension). To send reminders tick the relevant checkboxes and then click on ‘Send Reminders’. After that, select the ‘AUTHOR: Invitation Reminder’ letter from the drop down menu, click on ‘Send Reminders’ and ‘Send Reminders Now’. To customize any of the letters, first click on ‘Customize Letter’ instead of on ‘Send Reminders’.

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

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

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

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

3.16.2 Reviewer Reminders

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

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

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

On the next page, select the appropriate letter from the drop down menu: ‘REVIEWER: Reminder (Before Due Date)’ (for reviewers whose review is due soon, but not yet overdue); ‘REVIEWER: 1st Reminder’; ‘REVIEWER: 2nd Reminder’. Customize the letter(s) if necessary and then click on 'Send Reminders' and on 'Send Reminder Letters Now'.

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

3.16.3 Editor Reminders

3.16.3.1 Assignment Status Report

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

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

**NOTES:**
- The status may be based upon the date when the last reviewer agreed/submitted a review/was invited, so it may very well be that some of the review deadlines are not even expired yet.
- The following papers are excluded from this overview: new and revised submissions that have not yet been assigned, papers out for revision and rejected/accepted papers that still need to have the final disposition set.
- Only the journal’s main editor and/or editorial office will generally have access to these editor reminders.

### 3.16.3.2 New Assignments Report

Overview of editors who have been assigned to a manuscript but have not taken further action since. This report allows you to narrow down the results so that they only include papers that were assigned more than X days ago.

Go to **Send Reminder Letters** in your main menu and in the ‘Editor Reminders’ section click on **New Assignments Report**. Tick and untick the checkboxes for the editors as appropriate (Check All will automatically tick all boxes; Clear All will uncheck all of them). Enter a number of days into ‘Show all submissions with more than X elapsed days since the Editor was assigned or invited’ and click on ‘Submit’. ‘X’ is what you consider a reasonable amount of time for an editor to take action on a manuscript. If you do not fill in a number, the overview will include all mss for which an editor has been assigned but has not taken action yet.

You can decide for yourself whether any of the papers are problematic (check details and history). As some editors may have multiple problematic papers, you may rather want to make a list of the problematic manuscript numbers and then send that to the editor(s) concerned outside of EM. You can always make a note about having reminded the editor in the manuscript notes of the papers concerned (see section 3.1.3.1).

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

Overview of all papers for which the reviews are complete but for which the editor still needs to take a decision. Go to Send Reminder Letters in your main menu and in the 'Editor Reminders' section click on Required Reviews Complete Report.

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

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

4. Proposal Menu: Inviting Authors

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

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

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

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

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

NOTE:
➢ Book Reviewers are considered AUTHORS: soliciting Book Reviews has to be done through the Proposals menu and the book reviewers need to log on as authors and submit their review as a new (or in case of later versions, revised) submission.
➢ When finished, you will need to close off the proposal by setting the final disposition to either ‘Completed’ or ‘Withdrawn’. If you cannot do so because there are still authors with an ‘Agreed’ or ‘Invited’ status, please go to the Invite Authors page and Unassign / Uninvite these authors. Once you have done so, you should be able to set the final disposition.
5. Troubleshooting

Our EM Support page contains videos as well as an extensive FAQ document, that you may find helpful. The EM Support page includes resources for authors and reviewers as well, so please feel free to refer authors and reviewers to this page. If you have any questions regarding the system, please do not hesitate to contact our EM Support Team at Support-EM@brill.com.

Appendix I. Overview and Meaning of the Various Submission Statuses

Please note that in some cases, the status shown to authors is set to a more general 'under review' as in our experience, it can cause quite some unrest with authors if they see every single status change of their ms and we know that not all reviewers respond in a timely fashion, some agree, but don’t deliver their review, etc. By showing the status as 'under review' this tends to make things clearer and in case of questions, the author can always contact the editor for a more detailed status update, at which time you can decide what information to share with the author and how.

<table>
<thead>
<tr>
<th>Editorial Status</th>
<th>Status shown to authors if different from Editorial Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept</td>
<td>Ms has been accepted, decision letter has been sent. Final disposition has not yet been set, so ms not yet forwarded to Brill via EM.</td>
<td></td>
</tr>
<tr>
<td>Accepted on Submission</td>
<td>Final disposition = Accept on submission (probably rare as this final disposition option is only available while a ms is still in New Submissions Requiring Assignment)</td>
<td></td>
</tr>
<tr>
<td>Author Declines to Revise</td>
<td>Author has declined to revise online; if you do not expect the revision to come in anymore, you can set final disposition to withdrawn to clean up the folder with mss out for revision</td>
<td></td>
</tr>
<tr>
<td>Completed Accept</td>
<td>Final disposition has been set to Accept</td>
<td></td>
</tr>
<tr>
<td>Completed Reject</td>
<td>Final disposition has been set to reject (nowadays this is automatically done as soon as you send the rejection decision letter)</td>
<td></td>
</tr>
<tr>
<td>Completed Withdrawn</td>
<td>Final disposition has been set to withdrawn</td>
<td></td>
</tr>
<tr>
<td>Decision in Process</td>
<td>Under Review</td>
<td>An editor has taken a decision, but this decision still needs to be formally approved by another editor and/or the decision letter still needs to be sent</td>
</tr>
<tr>
<td>Decision Rescinded</td>
<td>Under Review</td>
<td>Editor has cancelled a decision that was taken previously – ms is back with the editor and the editor will be expected to submit a new, replacement decision when ready.</td>
</tr>
<tr>
<td>Error with Editor</td>
<td>Under Review</td>
<td>Editor has tried to edit submission and rebuild the submission PDF, but that PDF has not been rebuilt properly (hence the error)</td>
</tr>
<tr>
<td>Incomplete</td>
<td>Author has created/edited a submission, but not finished the process and hence the ms has not been sent over to the editor. This need not necessarily be a problem as sometimes authors create multiple (duplicate) submissions for the same paper. As long as one submission for that paper came through to the editor, that is fine. If nothing similar was submitted, you may wish to reach out to the author.</td>
<td></td>
</tr>
<tr>
<td>Incomplete with Editor</td>
<td>Under Review</td>
<td>Editor has tried to edit submission but has not finished the process. Ms will be in Incomplete Submissions of the editor who pressed edit submission. To save changes already made, go back into Edit Submission mode and finish the process (which involves rebuilding and then approving the new submission PDF). Otherwise, use Revert Submission to reinstate the PDF version that was in the system previously.</td>
</tr>
<tr>
<td>Needs Approval</td>
<td>Author has created a new submission, and the system has built a PDF, but the author still needs to check and formally approve this in order to send it on to the editor.</td>
<td></td>
</tr>
<tr>
<td>PDF Needs Editor Approval</td>
<td>Editor has edited submission and created a new PDF for the submission, but still needs to approve this new version. Until the new version has been approved, you may encounter some technical issues with the ms when sending for review/taking a decision and the system may continue to use the former instead of the latest editor’s version of the submission PDF.</td>
<td></td>
</tr>
<tr>
<td>Rebuttal</td>
<td>Ms was rejected/withdrawn, but editors initiated a rebuttal to allow the author to send in a revision. Author to take action.</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Reject</td>
<td>Ms has been rejected and decision letter was sent, final disposition still needs to be set to reject (should be rare as for rejections, final disposition is nowadays set automatically)</td>
<td></td>
</tr>
<tr>
<td>Removed by Author</td>
<td>Author removed submission (this can only be done for new mss that have not yet been submitted to the editor or that have been sent back to author)</td>
<td></td>
</tr>
<tr>
<td>Removed by Editor</td>
<td>Submission was removed by the editor (only possible to do so when ms is still in New Submissions Requiring Assignment – most likely reason this was done was because of a submission being submitted multiple times – by keeping one and removing the duplicates you can make sure you only have one version left in the system)</td>
<td></td>
</tr>
<tr>
<td>Required Reviews</td>
<td>Editor has changed the nr of required reviews for a ms (e.g., from 2 to 3)</td>
<td></td>
</tr>
<tr>
<td>Required Reviews</td>
<td>The number of reviews required as shown on the Invite Reviewers page is now in and the ms will appear in the Submissions with All Required Reviews complete folder of the handling editor – up to that editor to decide whether the ms is indeed ready for a decision, or whether further reviews are needed.</td>
<td></td>
</tr>
<tr>
<td>Completed</td>
<td>The number of reviews required as shown on the Invite Reviewers page is now in and the ms will appear in the Submissions with All Required Reviews complete folder of the handling editor – up to that editor to decide whether the ms is indeed ready for a decision, or whether further reviews are needed.</td>
<td></td>
</tr>
<tr>
<td>Reviewer invited</td>
<td>Reviewer has been invited, but not yet agreed/declined/submitted a review</td>
<td></td>
</tr>
<tr>
<td>Revise</td>
<td>Author has been asked to revise, but has not yet sent in revision</td>
<td></td>
</tr>
<tr>
<td>Revised PDF Needs</td>
<td>Editor has edited submission for a revised submission, and created a new PDF for that submission, but still needs to approve this new version. Until the new version has been approved, you may encounter some technical issues with the ms when sending for review/taking a decision and the system may continue to use the former instead of the latest editor's version of the submission PDF.</td>
<td></td>
</tr>
<tr>
<td>Editor Approval</td>
<td>Revised submission has been received and will be in Revised Submissions Required Assignment</td>
<td></td>
</tr>
<tr>
<td>Revision Needs</td>
<td>Author has created a revised submission, but still has to check and formally approve the revised submission in order to send it to the editor</td>
<td></td>
</tr>
<tr>
<td>Approval</td>
<td>Revised submission has been received and will be in Revised Submissions Required Assignment</td>
<td></td>
</tr>
<tr>
<td>Revision</td>
<td>Editor has received submission, but found some technical issues (e.g., incomplete/not properly anonymized, etc.) and therefore returned the ms to the author using Send Back To Author. Author should fix the problem and edit submission to update the files. When the PDF has been rebuilt, author should check and approve in order to send back to editor.</td>
<td></td>
</tr>
<tr>
<td>Submitted to Journal</td>
<td>New submission has been sent to the author – this will be in New Submissions Requiring Assignment.</td>
<td></td>
</tr>
<tr>
<td>Sent Back to Author</td>
<td>Handling Editor has been unassigned.</td>
<td></td>
</tr>
<tr>
<td>Submitted to Journal</td>
<td>Ms has been sent for review, one or more reviewers agreed/sent in review</td>
<td></td>
</tr>
<tr>
<td>Unassign Editor</td>
<td>Editor has been assigned and needs to take action.</td>
<td></td>
</tr>
</tbody>
</table>