

eScholarship Journals Manual for Editors

This manual describes the submission management system for eScholarship Journals and details all the functionality that editors can utilize to manage the peer review and editing workflows for incoming manuscript submissions.

While the contents of this manual describe the full breadth of features available for journal editors, your workflow may differ depending on many factors. If you have questions about how to utilize the submission management system, or need further assistance, please [contact eScholarship Support](#).

A web-based version of this manual is also available, which includes high-resolution versions of the images and screenshots. To access the web version, go to: <https://submit.escholarship.org/help/journals/>

A. Accessing the submission management system

1. Start by going to your journal's eScholarship site. Click on the Administrator Login button located in the left sidebar.
2. Enter your email address and password, then click the Log in button.
3. You should then land on the Journal Home page, which will list the permissions you have for this journal as well as any queued manuscripts. If you arrive here, skip step 4 and move on to slide B.
4. If you instead see the My Account dashboard, locate your journal under Manage Existing Deposits (Tip: Journals are listed in **green text**) and click on its title. You will then see the Journal Home page mentioned above in step 3.

Unable to access your journal?

- Make sure you have permission. Ask your Journal Manager to add you as an Editor, Section Editor or Journal Manager (as appropriate).
- Make sure you are using the same email address that the Journal Manager used when adding permissions for you.
- If you're still having trouble, [contact eScholarship Support](#).

Make sure you are viewing a page similar to circle 3 before moving on to slide B.

B. The Journal Home screen

The Journal Home screen lists your permissions for the journal and gives an overview of pending manuscripts, separated into three queues (Unassigned, In Review, In Editing) and an Archive (which includes published and rejected items).

1. You can always return to this familiar starting point by clicking the Journal Home link in the navigation header.
2. Each permission (or role) assigned to your account is represented by a link, which will take you into a workflow specifically tailored to that role's task. These roles are:
 - **Configure Journal (Journal Manager role)** - The Journal Manager can make configuration changes to the journal, such as editing email templates, adding new users, or modifying the workflow.
 - **Manage All Submissions (Editor role)** - The Editor role has access to all manuscripts submitted to the journal, can register an editorial decision, and can publish issues.
 - **Manage Section (Section Editor role)** - The Section Editor role has access to only the manuscripts which have been assigned to them. By default, Section Editors can also register editorial decisions, however the Journal Manager can modify the journal's settings to prevent Section Editors from registering decisions (Setup step 4.5). Section Editors cannot publish issues.
 - **Submit or Revise Manuscript (Author role)** - Authors use this link to submit manuscripts for consideration, monitor the status of their submission, view peer review results, upload revisions and participate in other editorial activities.
 - **Respond to Review Request (Reviewer role)** - Reviewers use this link to respond to and complete request for peer review.
3. Next to each role listed on this page are shortcuts to the various manuscript queues, as well as some specialized shortcuts to functions such as Create Issue and New Submission. These same queues and links are represented by clicking on the role title (such as Manage All Submissions).

Click on the Manage All Submissions link before moving on to slide C.

MY JOURNALS DEMO HOME ABOUT CURRENT ARCHIVES ANNOUNCEMENTS

Demo Home

Demo Home

eScholarship Demonstration Journal

» Configure Journal					[QuickSubmit]
» Manage All Submissions	1 Unassigned	3 In Review	19 In Editing		[Create Issue] [Notify Users]
» Manage Section		1 In Review	9 In Editing		
» Submit or Revise Manuscript		13 Active	2 Archive		[New Submission]
» Respond to Review Request			5 Active		

My Account

- » [Show My Journals](#)
- » [Edit My Profile](#)
- » [Change My Password](#)
- » [Log Out](#)

C. Manage All Submissions (Editor Home)

Notice when you click on Manage All Submissions from the Journal Home screen, the same queues and links are listed on the Editor Home page.

1. The manuscript queues are listed under the heading Submissions:
 - **Unassigned** - Contains articles that have recently been submitted and have not yet been assigned to a particular Editor or Section Editor.
 - **In Review** - Contains articles that have been assigned to an Editor or Section Editor and are either ready to have Reviewers assigned, or are actively under review.
 - **In Editing** - Contains articles that have been accepted and are now either in the Copyediting, Layout or Proofreading stages.
 - **Archives** - Contains articles that have already been published, as well as articles that were rejected or declined.
2. The Editor also has access to links used to manage Issues:
 - **Create Issue** - Used to create new future issues, to which approved articles can then be assigned.
 - **Notify Users** - Can be used to notify users enrolled in your journal when a new issue has been published, however most Editors prefer to use a 3rd-party service (such as [MailChimp](#)) to send emails that can be highly customized.
 - **Future Issues** - Once an issue has been created, it will be listed under Future Issues until it has been published.
 - **Back Issues** - Once an issue has been published it will be listed under Back Issues. Note that journals which publish incrementally (i.e. as articles are ready for release, rather than an entire issue at once) will find their current issue under Back Issues after the first article has been published to the issue.
3. Remember: You can always use the Journal Home link in the navigation header to return to a familiar starting point.

Click on the Unassigned link before moving to slide D.

MY JOURNAL **3** DEMO HOME ABOUT CURRENT ARCHIVES ANNOUNCEMENTS

Journal Home > **Editor**

Editor Home

Submissions **1**

- » [Unassigned \(1\)](#)
- » [In Review \(3\)](#)
- » [In Editing \(19\)](#)
- » [Archives](#)

Title contains

Submitted between and

Issues **2**

- » [Create Issue](#)
- » [Notify Users](#)
- » [Future Issues](#)
- » [Back Issues](#)

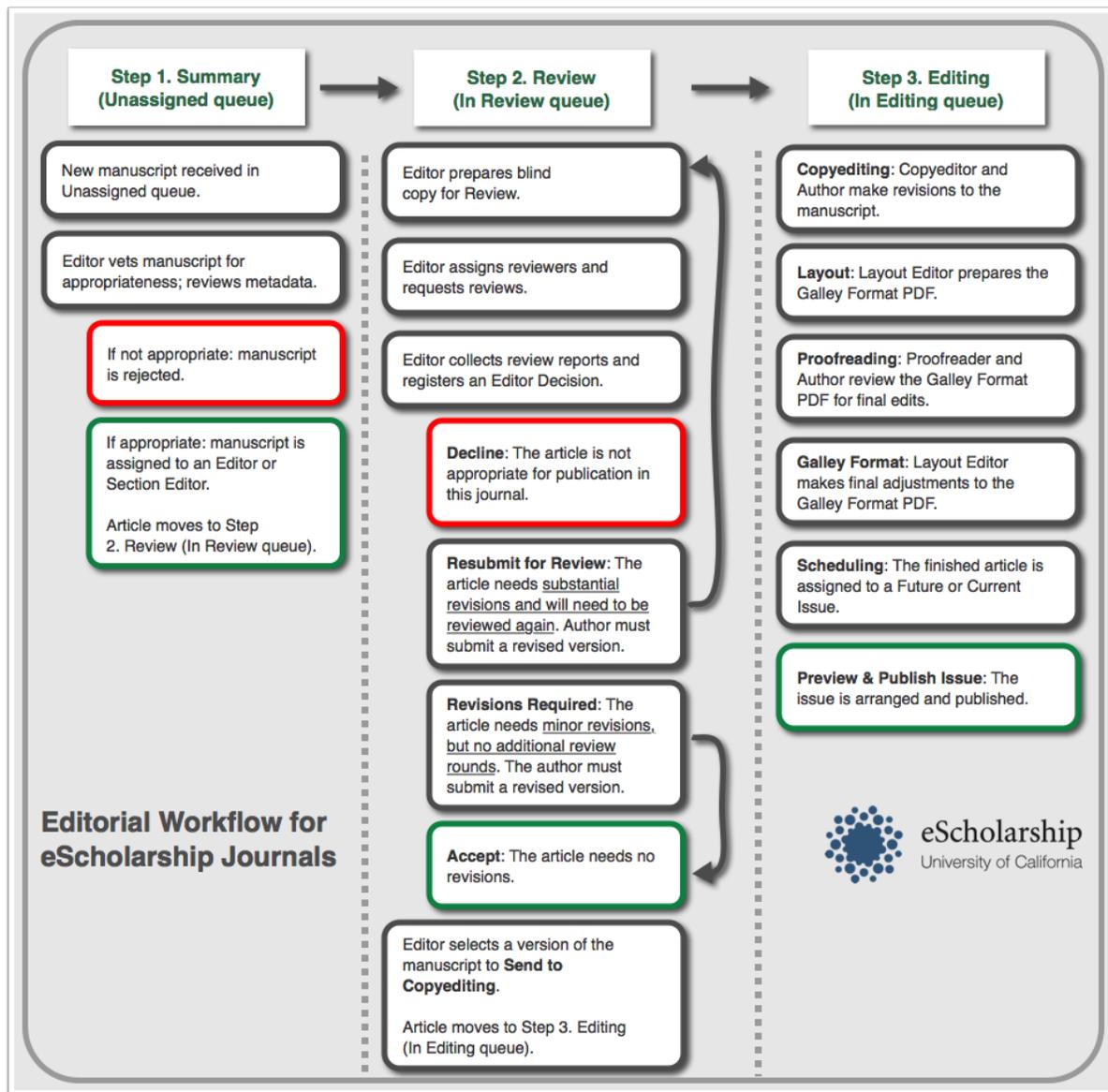
D. The editorial workflow

Before moving forward, it will be useful to gain a basic understanding of the suggested editorial workflow for which the submission management system was designed. Your own journal's editorial workflow may differ from what is represented in the diagram, and in many cases the system will be flexible enough to accommodate your specific needs. In the slides that follow, each of these steps will be covered in greater detail.

A high resolution version of this workflow diagram can be found at: <https://submit.escholarship.org/help/journals/>

Tip: If you are uploading back content, or if you manage editorial processes outside of the eScholarship system, you can bypass much of this complexity using the QuickSubmit tool, which allows you to upload camera-ready PDFs directly to an issue. The QuickSubmit tool is described in more detail in the video resource [Using the QuickSubmit Tool to Upload Complete Issues or Back Content](#).

Now continue to slide E for an overview of the Unassigned queue.



E. The Unassigned queue

The unassigned queue lists manuscripts that have been recently submitted, but which have not yet been assigned to an editor.

1. You can switch your view to one of the other queues using the tabs near the top of the page.
2. If you have many items in a queue, you can narrow in on a specific item using the search attributes.
3. If you're seeing fewer items in this queue than you'd expected, be sure to clear any search attributes and reset the Assigned To and In Section toggles.

Click on the title of one of your Unassigned manuscripts before moving to slide F.

Journal Home > Editor > Submissions > **Unassigned**

Unassigned

UNASSIGNED IN REVIEW IN EDITING ARCHIVES **1**

Assigned To: In Section:

Title contains
Submitted between and **2**

<u>ID</u>	<u>MM-DD SUBMIT</u>	<u>SEC</u>	<u>AUTHORS</u>	<u>TITLE</u>
20731	12-17	FCI	Support	TESTING THE COVER LETTER AREA
20889	01-06	FCI	Support, CoAuthor	EXAMPLE SUBMISSION TO AN ESCHOLARSHIP JOURNAL

3 2 of 2 Items

Tip: If you were expecting to see more submissions in this list, try clearing the Assigned To, In Section, and search criteria near the top of the page.

F. The Summary tab

Once you've clicked on the title of an unassigned manuscript, you'll arrive at the Summary tab for this particular manuscript.

1. Notice before moving forward that the editorial workflow steps from the diagram in slide D. are represented as numbered 'tabs' near the top of the page. It is possible to move between steps by clicking on these tabs, but in general it's best to work your way through the steps sequentially.
2. The editor should now vet this manuscript to see if it is appropriate for this journal. Download the Original file if you'd like to take a quick look at the submitted manuscript.
3. You may also want to download the supplemental files (if any were provided).
4. Review the Cover Letter (if the author provided one).
5. Review the metadata the author provided. If necessary, use the Edit Metadata link to make any changes.
6. If this submission is **not appropriate** for the journal: use the Reject and Archive Submission link to reject this article. You will be given an opportunity to send a rejection letter to the submitter.
7. If this submission **is appropriate** for the journal: verify that the article is assigned to the correct journal section. (Journal Managers can configure journal sections by going to Configure Journal > Journal Sections.)
8. Assign this article to at least one Editor or Section Editor. You can also quickly assign the article to yourself if you'd like.
9. Once you've assigned at least one Editor or Section Editor, the article will now move to the In Review queue. Click on the Review tab before moving to slide G.

Journal Home > Editor > Submissions > #20889 > Summary

#20889 Summary

1. SUMMARY 2. REVIEW 3. EDITING | HISTORY

Submission

Authors eScholarship Support, Sample CoAuthor

Title Example Submission to an eScholarship Journal

Original file 20889-75961-1-SM.DOC 2014-01-06 01:39 PM

Supp. files 20889-75962-1-SP.PNG 2014-01-06 01:40 PM [EDIT](#) [ADD A SUPPLEMENTARY FILE](#)
20889-75963-1-SP.JPG 2014-01-06 01:40 PM [EDIT](#)

Submitter eScholarship Support [CHANGE](#)

Note: The *submitter* is the only author who can interact with this manuscript. Click [here](#) for more information.

Note: This manuscript was submitted by an editor or journal manager. Use the [CHANGE](#) link to give author access to this submission.

Date submitted 2014-01-06 01:41 PM

Section Front Cover - Inside [Change to](#) [Record](#)

Cover letter 4 This is an example of a cover letter.
Here, an author may provide additional information that is useful to the editor.
Sincerely,
Sample Author

Editors

REVIEW EDITING REQUEST ACTION

[Record](#) [ADD SECTION EDITOR](#) [ADD EDITOR](#) [ADD SELF](#) 8 ^{None assigned}

Status

Status Awaiting assignment 6 [REJECT AND ARCHIVE SUBMISSION](#)

Initiated 2014-01-06 01:41 PM

Last modified 2014-01-06 01:41 PM

Submission Metadata

[EDIT METADATA](#) 5

Authors

Name eScholarship Support

Affiliation —

Country —

Bio statement —

Principal contact for editorial correspondence.

Name Sample CoAuthor

Affiliation —

Country —

Bio statement —

Title and Abstract

Title Example Submission to an eScholarship Journal

Abstract Here is where an abstract would go. Editors may want to edit the abstract before publishing the final article to an issue.

Indexing

Academic discipline(s) Arts and Humanities

Keywords some; keywords are; here

Language en

Acknowledgements

Acknowledgements Here is an example of where Acknowledgements can be recorded by the author.

G. The Review tab: Preparing the Review version

It's now time to prepare the manuscript for peer review and assign one or more reviewers.

1. The editor should again look at the file that was provided by the author to make sure that no information is included in the file that would compromise blind review.
2. If needed, download the file and remove any compromising information (such as a cover page with the author's name on it), then upload the revised Review version.
3. You'll also want to review the supplementary files. You can choose which of these files will be presented to reviewers. Be sure to click the Record button to save any changes made to supplementary file permissions.
4. Once everything is ready for review, click Select Reviewer to assign the first reviewer.

Journal Home > Editor > Submissions > #20889 > **Review**

#20889 Review

1. SUMMARY **2. REVIEW** 3. EDITING | HISTORY

Submission

Authors eScholarship Support, Sample CoAuthor 

Title Example Submission to an eScholarship Journal

Section Front Cover - Inside

Editor eScholarship Support 

Review Version **1** [20889-75964-1-RV.DOC](#) 2014-01-06 01:41 PM [ENSURING A BLIND REVIEW](#)
[Convert File to PDF](#) PDF file will be stripped of identifying metadata, i.e. author name.

Please note: Conversion may not work for .doc files created with an old version of Microsoft Word.
If the Generate PDF button doesn't work for you, try one of the following:

- Download the document and use 3rd-party software (such as Adobe Acrobat) to create a PDF, then upload the PDF.
- Download the document and re-save it with a newer version of Microsoft Word, then upload the newly saved document and try the Generate PDF button again.

Supp. files

2 Upload a revised Review Version [Browse...](#) No file selected. [Upload](#)

[20889-75962-1-SP.PNG](#) 2014-01-06 01:40 PM Present file to reviewers [Record](#)

[20889-75963-1-SP.JPG](#) 2014-01-06 01:40 PM Present file to reviewers [Record](#) **3**

Peer Review

Round 1 **4** [SELECT REVIEWER](#) [VIEW REGRETS, CANCELS, PREVIOUS ROUNDS](#)

Editor Decision

Record New Decision [Choose One](#) [Record Decision](#)

Decisions Recorded None

H. Select Reviewer

The Select Reviewer page lists all reviewers enrolled in your journal.

1. To add new reviewers, click Enroll New Reviewer.
2. The Reviewer table provides information that may be useful in selecting the right reviewer for this article, such as reviewer interest(s) and metrics on the reviewer's previous activity for this journal.
3. You can get more detailed information about a specific reviewer by clicking on their name.
4. To assign a reviewer to this article, click the Assign link next to the name of the reviewer you want to add.

Journal Home > Editor > Submissions > #20889 > Review > Reviewers

Reviewers

Select Reviewer

[A](#)
[B](#)
[C](#)
[D](#)
[E](#)
[F](#)
[G](#)
[H](#)
[I](#)
[J](#)
[K](#)
[L](#)
[M](#)
[N](#)
[O](#)
[P](#)
[Q](#)
[R](#)
[S](#)
[T](#)
[U](#)
[V](#)
[W](#)
[X](#)
[Y](#)
[Z](#)
[All](#)

[ENROLL NEW REVIEWER](#) **1**

<u>NAME</u>	<u>REVIEWING INTERESTS</u>	<u>RATING</u>	<u>DONE</u>	<u>WEEKS</u>	<u>LATEST</u>	<u>ACTIVE</u>	<u>ACTION</u>
LAUREN SCHIEBELHUT		N/A	2	0	2013-10-30 07:22 AM	0	ASSIGN
MS. LAUREN M. SCHIEBELHUT		N/A	2	0	2013-10-27 12:55 PM	0	ASSIGN
ESCHOLARSHIP SUPPORT	Psychology, Education Psychology	3.7	2	0	2013-10-04 12:37 PM	5	ASSIGN 4
MARCEL OURSON		N/A	1	0	2013-09-24 02:15 PM	1	ASSIGN
BRENDA ORTIZ 3		N/A	0	—	—	0	ASSIGN
BUJC ADMINISTRATOR	Classics, Latin, Greek	N/A	0	—	2013-03-16 12:10 PM	0	ASSIGN

I. The Review tab: Request Review

Important note: Assigning a reviewer simply builds a list of *possible* reviewers for this article. You have not yet actually requested a review from this reviewer.

1. If your journal is using customized Review Forms, select the form you'd like this reviewer to use. (Journal Managers can configure review forms by going to Configure Journal > Review Forms.)
2. Click the Request icon to send a review request email to this reviewer.
3. If you'd like to add more reviewers to this article, repeat this process by clicking the Select Reviewer link.

Upload a revised Review Version No file selected.

Supp. files

20889-75962-1-SP.PNG	2014-01-06 01:40 PM	Present file to reviewers <input checked="" type="checkbox"/>	<input type="button" value="Record"/>
20889-75963-1-SP.JPG	2014-01-06 01:40 PM	Present file to reviewers <input type="checkbox"/>	<input type="button" value="Record"/>

Peer Review **Round 1** 3 [SELECT REVIEWER](#) [VIEW REGRETS, CANCELS, PREVIOUS ROUNDS](#)

Reviewer A **eScholarship Support** [CLEAR REVIEWER](#)

Review Form None / Free Form Rev 1 [SELECT REVIEW FORM](#)

REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
2 <input type="button" value="Request"/>	—	2014-01-27 12:00 AM	<input type="button" value="Acknowledge"/>

Editor Decision

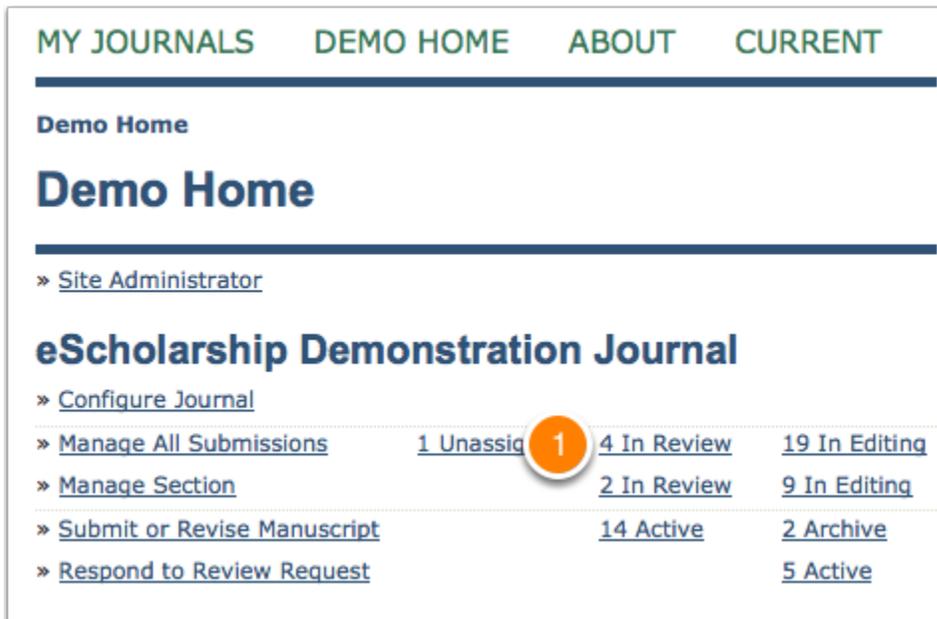
Record New Decision

Decisions Recorded None

J. Returning to the In Review queue

After you've assigned reviewers, you'll likely exit the submission management system while you await the reviewers' reports. The editor who requested the reviews should receive email notifications as the reviews are completed, however, some reviewers may miss the 'notify editor' step so it's a good idea to check the In Review queue periodically.

1. For a reminder of how to log into the system, see slides A. and B. Once you reach the Journal Home screen, click on the In Review queue.



The screenshot shows the 'Demo Home' page of the eScholarship system. At the top, there are navigation links: 'MY JOURNALS', 'DEMO HOME', 'ABOUT', and 'CURRENT'. Below this is a 'Demo Home' header. A link for 'Site Administrator' is visible. The main title is 'eScholarship Demonstration Journal'. Below the title are several management links: 'Configure Journal', 'Manage All Submissions', 'Manage Section', 'Submit or Revise Manuscript', and 'Respond to Review Request'. The 'Manage All Submissions' link is highlighted with a red circle containing the number '1'. To the right of this link, there are statistics: '1 Unassigned', '4 In Review', and '19 In Editing'. Below this, there are more statistics: '2 In Review' and '9 In Editing' for the 'Manage Section' link, and '14 Active' and '2 Archive' for the 'Submit or Revise Manuscript' link. Finally, '5 Active' is shown for the 'Respond to Review Request' link.

» Site Administrator			
eScholarship Demonstration Journal			
» Configure Journal			
» Manage All Submissions	1 Unassigned	4 In Review	19 In Editing
» Manage Section		2 In Review	9 In Editing
» Submit or Revise Manuscript		14 Active	2 Archive
» Respond to Review Request			5 Active

K. The In Review queue

On the In Review queue page Editors will see an overview of **all articles** that are either awaiting assignment to reviewer(s), or are currently under review. Section Editors will see an overview of **articles that have been assigned to them** and are awaiting assignment to reviewer(s) or are currently under review.

1. The In Review queue provides useful information to gauge which articles are in what stage of the review process. In the example below, the article with ID # 20889 was sent to a reviewer on 1-06, and the reviewer completed their report on the very same day.
2. Click on the title of a manuscript to view the reviewer's report.

Journal Home > Editor > Submissions > **Submissions in Review**

Submissions in Review

UNASSIGNED **IN REVIEW** IN EDITING ARCHIVES

Assigned To: In Section:

Title

Submitted and

ID	MM-DD SUBMITTED	SEC	AUTHORS	TITLE	PEER REVIEW		DONE	RULING	SE
					ASK	DUE			
18856	07-02	ART	Support	TESTING ARTICLE	—	—	—	—	eS
19245	08-12	ART	Meeker	TEST SUBMISSION 1				—	JZ
19763	09-24	ART	Meeker	FALL 2013 TEST SUBMISSION	09-24	-12	—	10-13	GP
20889	01-06	FCI	Support, CoAuthor	EXAMPLE SUBMISSION TO AN ESCHOLARSHIP...	01-06	—	01-06	—	eS

1 - 4 of 4 Items

Tip: If you were expecting to see more submissions in this list, try clearing the Assigned To, In Section, and search criteria near the top of the page.

L. The Review tab: Checking review reports

1. **Here we can see that Reviewer A completed their report.** You can see the reviewer's comments (as entered into the review form) by clicking the speech bubble icon.
2. If the reviewer uploaded a file as part of their review, you can download it by clicking on the file name.
3. If you'd like the author to be able to see the file the reviewer provided, check the Let author view file option.
4. You can give a subjective performance rating to this reviewer, which may help you gauge whether to utilize them again in the future. Reviewers cannot see this score.
5. Use the Acknowledge icon to send an acknowledgement email to the reviewer.
6. **Reviewer B has not yet completed their report.** You can view the due date for this reviewer and send them a reminder email. (Note: the system will automatically send reminders to the reviewer based on intervals configured by the Journal Manager in setup step 2.2.)
7. You can respond to the review request on behalf of the reviewer, or complete the review form for them. This is useful when a reviewer is not willing to use the system or provides you with a report via email or in physical format.
8. If you know this reviewer will not respond, or they've asked to stop receiving reminders, use the Cancel Request link.
9. **Some reviewers that you previously assigned to this article may no longer appear on the Review tab.** In such cases, the reviewer likely declined the review request. Click the View Regrets, Cancels, Previous Rounds link to see their reply.

Peer Review Round 1

[SELECT REVIEW](#) **9** [VIEW REGRETS, CANCELS, PREVIOUS ROUNDS](#)

Reviewer A eScholarship Support

Review Form: None / Free Form Review

REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
2014-01-06 02:21 PM	2014-01-06 02:22 PM	2014-01-27 12:00 AM	5

Recommendation Review: **1** Accept Submission 2014-01-06 02:23 PM
 2014-01-06 02:22 PM

Uploaded files: **2** [20889-75988-1-RV.DOC](#) 2014-01-06 02: **3** Let author view file [Record](#)

Reviewer rating: **4** 5 High [Record](#)

Reviewer B Marcel Ourson

[SELECT REVIEW FORM](#) **8** [CANCEL REQUEST](#)

Review Form: None / Free Form Review

REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
2014-01-06 02:37 PM 6		2014-01-27 12:00 AM	

Editor To Enter: **7** [WILL DO THE REVIEW](#) [UNABLE TO DO THE REVIEW](#)

Upload review: [Browse...](#) No file selected. [Upload](#)

Reviewer rating: 5 High [Record](#)

M. The Review tab: Register an Editor Decision

Once all the peer review reports are in, it's time to register an Editor Decision.

1. Select an Editor Decision, then click the Record Decision button.
2. Notify the author of the decision by clicking the envelope icon.

Important note: Pay special attention to the yellow information blocks that will appear when you click the envelope icon to send your decision letter to the author. These blocks contain important information about how to properly share the review reports with the author.

The steps that follow differ depending on the Editor Decision you select:

- **Accept Submission** - No further revisions necessary, proceed to slide N.
- **Revisions Required** - Author needs to make minor revisions. You should describe these in the email notification you send to the author. The author should then upload a revised version to the submission system. When the revisions are addressed, change the decision to Accept and notify the author of the new decision.
- **Resubmit for Review** - Author needs to make substantial revisions. Once the author has uploaded a revised version to the system, you will have the option to select the revised version as a new Review Version for a fresh round of peer review. Return to slide G. to assign and request new reviews.
- **Decline Submission** - The article is rejected and moved to the archive.

Editor Decision

Record New Decision 1

Decisions Recorded None

Notify Author 2

Email/Comments Record

Current article versions:

Review Version	20889-75964-1-RV.DOC	2014-01-06 01:41 PM
Editor Version	20889-75965-1-ED.DOC	2014-01-06 01:41 PM DELETE

Upload new Editor Version No file selected.

N. The Review tab: Send to Copyediting

Once the article has been accepted:

1. Select the version of the article that you'd like to send forward to the Copyediting stage.
2. Click the Send to Copyediting button.

Editor Decision

Record New Decision

Decisions Recorded 2014-01-06 02:56 PM Accept Submission

Notify Author Send email to author regarding editorial decision.

Email/Comments Record 2014-01-06 02:56 PM Last Email and/or Comment

Select an article version from below and Send to Copyediting:

Review Version 1 20889-75964-1-RV.DOC 2014-01-06 01:41 PM

Editor Version 20889-75965-1-ED.DOC 2014-01-06 01:41 PM [DELETE](#)

Upload new Editor Version No file selected.

2

O. Initial Copyedit

Once you click the Send to Copyediting button on the Review tab, you will automatically move to the Editing tab. If, however, you left the system and now need to return to the Editing tab, you can do so similar the way you returned to the Review tab in slide J; just click the In Editing link on the Journal Home screen.

The first Editing stage is Copyediting. The system will have automatically placed the version you selected to Send to Copyediting on the Initial Copyedit line.

Note: For journals that are configured to utilize a dedicated Copyeditor, an option to assign the Copyeditor will appear near the top of the Copyediting section.

1. The Editor or Copyeditor should click the Initiate (or Request) link to begin the first stage of Copyediting.
2. The Editor or Copyeditor should then download the Initial Copyedit file and make any necessary changes.
3. Once the Initial Copyedit is complete, the Editor or Copyeditor should **replace** the Initial Copyedit version by uploading the revised file to the Step 1 (Initial Copyedit line).
4. Click the Complete link on the Initial Copyedit line to mark this step as completed.
5. Now click the Request icon on the Author Copyedit line to ask the author to verify the initial copyediting.
6. More detailed copyediting instructions can be found near the bottom of the Copyediting section. (Journal Managers can customize the contents of these instructions to suit the journal's specific needs in setup step 4.6.)

Copyediting

[REVIEW METADATA](#)

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Initial Copyedit	1 INITIATE	N/A	4 COMPLETE	N/A
2 20889-76001-1-CE.DOC	2014-01-06 03:17 PM			
2. Author Copyedit	5 Request	—	COMPLETE	Request
File:				
3. Final Copyedit		N/A	COMPLETE	N/A
File:				

Upload file to Step 1, Step 2, or Step 3 [Browse...](#) **3** [File](#) selected. [Upload](#)

Copyedit Comments [No Comments](#) **6** [COPYEDIT INSTRUCTIONS](#)

P. Author Copyedit

1. Once the author has uploaded their copyedited version, the copyeditor can download the author's document.
2. Notice that in this case, the author forgot to mark their work as complete. Click the Complete link to mark this task as complete.
3. You may also wish to send the author an acknowledgement email.

Copyediting

REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Initial Copyedit File: 20889-76001-2-CE.DOC	2014-01-06 03:24 PM	N/A	2014-01-06 03:24 PM	N/A
2. Author Copyedit File: 20889-76002-1-CE.DOC	2014-01-06 03:34 PM	2014-01-06 03:34 PM	2 COMPLETE	3 ACKNOWLEDGE
3. Final Copyedit File:		N/A	COMPLETE	N/A

Upload file to Step 1, Step 2, or Step 3 No file selected.

Copyedit Comments [No Comments](#) [COPYEDIT INSTRUCTIONS](#)

Q. Final Copyedit

The copyeditor should review the author's copyedited version and make any final adjustments.

1. Upload the final copyedited file to Step 3 (Final Copyedit line).
2. Mark the final copyedit as complete.

Copyediting

REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Initial Copyedit File: 20889-76001-2-CE.DOC	2014-01-06 03:24 PM	N/A	2014-01-06 03:24 PM	N/A
2. Author Copyedit File: 20889-76002-1-CE.DOC	2014-01-06 03:34 PM	2014-01-06 03:34 PM	2014-01-06 03:39 PM	2014-01-06 03:39 PM
3. Final Copyedit File: 20889-76001-3-CE.DOC	2014-01-06 03:39 PM	N/A	2 COMPLETE	N/A

Upload file to Step 1, Step 2, or Step 3 No file selected.

Copyedit Comments [No Comments](#) [COPYEDIT INSTRUCTIONS](#)

R. Layout

Once the Final Copyedit step is marked as complete the final copyedited version of the manuscript will automatically appear as the Layout Version in the Layout section.

Note: For journals that are configured to utilize a dedicated Layout Editor, an option to assign the Layout Editor will appear near the top of the Layout section.

1. The Editor or Layout Editor should download the Layout version and make any required formatting adjustments.
2. Once the layout is complete, the Editor or Layout Editor should upload the formatted version (**in PDF format**) to the Galley Format line of the Layout section.
3. The Editor or Layout Editor should also verify that the Supplementary Files are ready for production.
4. Double-check that there is **only 1 file in the yellow-highlighted Galley Format line** of the Layout section, and that the file is in **PDF format**.
5. More detailed Layout instructions may be found near the bottom of the Layout section. (Journal Managers can customize the contents of these instructions to suit the journal's specific needs in setup step 4.7.)

Layout

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
Layout Version	N/A	N/A	N/A	N/A

File **1** [20889-76004-1-LE.DOC](#) 2014-01-06 03:43 PM

[Generate PDF](#) Generated PDF will be added as a Galley Format document & Layout marked complete.

Please note: Conversion may not work for .doc files created with an old version of Microsoft Word. If the Generate PDF button doesn't work for you, try one of the following:

- Download the document and use 3rd-party software (such as Adobe Acrobat) to create a PDF, then upload the PDF.
- Download the document and re-save it with a newer version of Microsoft Word, then upload the newly saved document and try the Generate PDF button again.

Galley Format	FILE	ORDER	ACTION
1. PDF VIEW PROOF 4	20889-76005-1-PB.PDF 2014-01-06 04:01 PM	↑ ↓	EDIT DELETE

Supplementary Files	FILE	ORDER	ACTION
1. Figure 1	20889-75962-1-SP.PNG 2014-01-06 01:40 PM	↑ ↓	EDIT DELETE
2. Data Set	20889-75963-1-SP.JPG 2014-01-06 01:40 PM	↑ ↓	EDIT DELETE

Upload file to Layout Version, **Galley**, Supp. files [Browse...](#) No file **2** ed. [Upload](#)

Layout Comments [No Comments](#) **5** [LAYOUT INSTRUCTIONS](#) [REFERENCE LINKING](#)

S. Proofreading (Part 1)

In the Proofreading stage, the Author and Editor (or Proofreader) review the Galley Format PDF for any minor errors. At this stage, no files are exchanged. Instead, the Author and Editor (or Proofreader) record any needed edits as comments and the Layout Editor applies those changes to a revised Galley Format PDF.

Note: For journals that are configured to utilize a dedicated Proofreader, an option to assign the Proofreader will appear near the top of the Proofreading section.

1. The Editor or Proofreader should first click the Request icon to request that the Author review the Galley Format PDF for any minor errors.
2. More detailed Proofreading instructions can be found near the bottom of the Proofreading section. (Journal Managers can customize the contents of these instructions to suit the journal's specific needs in setup step 4.8.)

Proofreading

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	  2014-01-06 03:57 PM	2014-01-06 03:57 PM	<u>COMPLETE</u>	
2. Proofreader	<u>INITIATE</u>	N/A	—	N/A
3. Layout Editor	<u>INITIATE</u>	N/A	—	N/A
Proofreading Corrections  No Comm	 <u>PROOFING INSTRUCTIONS</u>			

T. Proofreading (Part 2)

1. Once the Author has completed proofreading, the Editor or Proofreader should send an acknowledgement email to the Author.
2. The Editor or Proofreader should then click the Initiate link to begin their part of the proofreading process.
3. The Editor or Proofreader will then download the Galley Format PDF to check for any errors.
4. The Editor or Proofreader should record any needed changes by clicking on the speech bubble icon.
5. The Editor or Proofreader should then mark their work as complete.

Note: At this point, the Editor should also verify that the metadata (including author names, article abstract, etc.) are properly formatted. Slide F describes how to review and edit the metadata in more detail.

Galley Format	FILE	ORDER	ACTION
1. PDF VIEW PROOF 3	18023-64309-1-PB.PDF 2013-04-19 02:53 PM	↑ ↓	EDIT DELETE
Supplementary Files	FILE	ORDER	ACTION
None			

Upload file to Layout Version, Galley, Supp. files No file selected.

Layout Comments No Comments [LAYOUT INSTRUCTIONS](#) [REFERENCE LINKING](#)

Proofreading

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	2014-01-08 11:42 AM	2014-01-08 11:43 AM	2014-01-08 11:44 A	1
2. Proofreader	2 INITIATE	N/A	5	N/A
3. Layout Editor	INITIATE	N/A		N/A

Proofreading Corre 4 2014-01-08 11:43 AM [PROOFING INSTRUCTIONS](#)

U. Proofreading (Part 3)

1. The Layout Editor should click the Initiate link to begin their part of the Proofreading process.
2. The Layout Editor should click on the speech bubble icon to review the Author and Proofreader's comments.

Proofreading				
	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	 2014-01-06 03:57 PM	2014-01-06 03:57 PM	2014-01-07 01:05 PM	
2. Proofreader	2014-01-07 01:08 PM	N/A	2014-01-07 01:09 PM	N/A
3. Layout Editor	 1 INITIATE	N/A	—	N/A
Proofreading Corre	2  2014-01-07 01:09 PM	PROOFING INSTRUCTIONS		

V. Proofreading (Part 4)

1. The Layout Editor should revise the Galley Format PDF to incorporate the proofreading comments, then mark their part of the proofreading process as complete.
2. If any proofreading changes were made, the Layout Editor should delete the old Galley Format PDF.
3. The Layout Editor should then upload the revised Galley Format PDF in the same way they did on slide R.

Layout

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
Layout Version	N/A	N/A	N/A	N/A

File: [20889-76004-1-LE.DOC](#) 2014-01-06 03:43 PM

[Generate PDF](#) Generated PDF will be added as a Galley Format document & Layout marked complete.

Please note: Conversion may not work for .doc files created with an old version of Microsoft Word.
If the Generate PDF button doesn't work for you, try one of the following:

- Download the document and use 3rd-party software (such as Adobe Acrobat) to create a PDF, then upload the PDF.
- Download the document and re-save it with a newer version of Microsoft Word, then upload the newly saved document and try the Generate PDF button again.

Galley Format	FILE	ORDER	ACTION
1. PDF VIEW PROOF	20889-76005-1-PB.PDF 2014-01-06 04:01 PM	↑ ↓	EDIT DELETE 2

Supplementary Files	FILE	ORDER	ACTION
1. Figure 1	20889-75962-1-SP.PNG 2014-01-06 01:40 PM	↑ ↓	EDIT DELETE
2. Data Set	20889-75963-1-SP.JPG 2014-01-06 01:40 PM	↑ ↓	EDIT DELETE

Upload file to Layout Version Galley, Supp. files No file 3 ed.

Layout Comments [No Comments](#) [LAYOUT INSTRUCTIONS](#) [REFERENCE LINKING](#)

Proofreading

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	2014-01-06 03:57 PM	2014-01-06 03:57 PM	2014-01-07 01:05 PM	
2. Proofreader	2014-01-07 01:08 PM	N/A	2014-01-07 01:09 PM	N/A
3. Layout Editor	2014-01-07 01:12 PM	N/A	1 COMPLETE	N/A

Proofreading Corrections 2014-01-07 01:09 PM [PROOFING INSTRUCTIONS](#)

W. Scheduling

Do a final check to ensure that only a single document is present in the yellow-highlighted Galley Format line of the Layout section. Also ensure that the document is in PDF format.

Now that the article is ready for publication, it's time to add it to an issue. This is done in the Scheduling section of the Editing tab.

1. Select the issue that this article should appear in. (If the desired issue is not available, create a new one using the Issue tools shown on slide C.)
2. Click the Record button to save your issue assignment.
3. If this article should have its own publication date, you may set one here. Most journals, however, assign the publication date at the Issue level, which can be configured when creating a new issue.
4. The Preview & Publish Issue link provides a convenient shortcut to the issue's table of contents, where you can arrange your contents and publish the issue.

The screenshot shows the 'Scheduling' section of a web interface. It includes a label 'Schedule for publication in Published' on the left. The main area contains a dropdown menu for issue selection (labeled '1') with 'Vol 1, No 1 (2011)' selected, a 'Record' button (labeled '2'), and a 'PREVIEW & PUBLISH ISSUE' link (labeled '4'). Below this is a date selection area (labeled '3') with three dropdown menus for month ('January'), day ('07'), and year ('2014'), followed by another 'Record' button.

X. Arrange and Publish Issue

The Table of Contents page shows all the articles that have been assigned to this issue, and gives you options for changing the order of items and publishing the issue.

1. You can click on any article's title to review information and make any necessary changes (such as returning to the Summary tab to review and update metadata, or replacing the Galley Format PDF in the Layout section of the Editing tab).
2. Use the smaller arrow icons to change the order of articles within a section.
3. Use the larger arrow icons to change the order of entire sections within the issue.
4. You can safely use the Save button to save any changes you've made to the Table of Contents without publishing the issue.
5. When the issue is ready to publish, first acknowledge the Deposit Agreement.
6. Then click the Publish Issue button. The issue should appear on your journal's public-facing eScholarship page within about 10-30 minutes.

Once an issue has been published, you will be able to access it using the Back Issues link on the Manage All Submissions (Editor role) page, described in more detail on slide C.

CREATE ISSUE **FUTURE ISSUES** BACK ISSUES

Issue:

TABLE OF CONTENTS ISSUE DATA

Table of Contents

Articles **3**

AUTHORS	TITLE	PROOFED AND APPROVED BY AUTHOR
2 pdwin 1	DEMONSTRATION ARTICLE (PALEOBIOS)	<input type="checkbox"/>
Support	DEMONSTRATION SUBMISSION	<input type="checkbox"/>
Support	TESTING PROOFREADING INDICATOR ON PROD	<input type="checkbox"/>
Support	DEMO TITLE	<input type="checkbox"/>
Support	DEMO FOR CJB	<input type="checkbox"/>

Front Cover - Inside

AUTHORS	TITLE	PROOFED AND APPROVED BY AUTHOR
Support, CoAuthor	EXAMPLE SUBMISSION TO AN ESCHOLARSHIP JOURNAL	<input type="checkbox"/>

Deposit Agreement **5**

* I have received permission from at least one author of each article in this issue to publish the items listed above. For articles submitted by the author using eScholarship's submission management system, I understand that the submitter granted permission at the time of deposit. For all other items, I have received paper or electronic documentation that an author has agreed to the journal's author agreement. (If you have questions about this agreement, contact help@escholarship.org.)

Having trouble publishing this issue? [Click here for help.](#)

Additional resources

Video Tutorials

In addition to this manual, there are several video tutorial walk throughs available to guide you through the manuscript management system step-by-step.

Editors

1. [Submission Summary & Editor Assignment](#)
2. [Peer Review & Editor Decision](#)
3. [Copyediting](#)
4. [Layout Editing](#)
5. [Proofreading](#)
6. [Issue Arrangement & Publishing](#)

Authors

1. [Submit Your Manuscript](#)
2. [Revise and Monitor the Status of Your Manuscript](#)
3. [Access Reviews and Submit a Revision](#)
4. [Complete the Editing Process](#)

Reviewers

1. [Responding to a Review Request & Completing the Peer Review Process](#)
2. [Updating Your User Profile](#)

Specialized topics

- [Using the QuickSubmit Tool to Upload Complete Issues or Back Content](#)

Community Forum

The [eScholarship Community Forum](#) is another great resource for tracking new feature releases, suggesting new functionality, and communicating with fellow journal managers and editors regarding tips, tricks and best practices:

<https://groups.google.com/forum/#!forum/escholarship-forum>