Episciences guidelines
- Editorial team -

We describe the principal tasks performed by the editorial team. They range from managing users to organising the reviewing process.

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1. Getting started with Episciences

To perform all the actions listed below, an account on the Episciences platform is needed. This account must be validated after clicking on the link that is sent via e-mail.

To create your own account, please see section “Managing Users” where you will find the corresponding instructions.

1.1. Main steps

- Creating user accounts: creation or migration of existing accounts that are already known by the HAL system (a CAS - Central Authentication Service - is available for HAL, Episciences and SciencesConf)
- Adding the roles associated to an account: editor, reviewer, editorial secretary
- Editing the website: adding a specific style, displaying your logo, organizing menus and menu items, choosing languages
- Implementing your editorial policy: displaying the policy of your journal in a dedicated page, creating your future volumes, defining your rating grid(s)
- Informing your team of the Episciences policy and requirements

1.2. Episciences policy and requirements

- Until now, Episciences has not distinguished between acceptance and publication steps, this means:
  - An “accepted” article is immediately “published”
  - The paper cannot be moved to another volume after having been published

<table>
<thead>
<tr>
<th>Good to know:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1/</strong> create your empty volume as a <strong>“shell”</strong></td>
</tr>
<tr>
<td><strong>2/</strong> add the <strong>ad hoc volume to the article</strong> before clicking on the “accept” button</td>
</tr>
<tr>
<td><strong>3/</strong> note that you can arrange the <strong>position</strong> of the article in the volume before or after clicking on the “accept” button</td>
</tr>
<tr>
<td><strong>4/</strong> the belonging of an article to a volume or a section MUST be defined before clicking on the “accept” button</td>
</tr>
</tbody>
</table>

- Episciences is based on Open Access contents, this means:
  - The submitted articles (as well as subsequent versions) have first to be deposited in an open archive (and be openly accessible\(^1\)) before they are pushed into the Episciences system
  - Your authors have to agree with the policy that their article is visible **before** the publication by the journal

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\(^1\) *Documents under embargo cannot be seen by the Episciences system*
2. General overview

2.1. Metadata associated to journals and articles

Whereas menus in the Journal layout can be freely organized, the metadata of the articles are provided by the original archive (HAL, ArXiv, CWI, ProdInra...) via the OAI-PMH format at submission time. This comprises in particular: title, authors, abstract, ID of the document in the source archive, keywords, access to the pdf of the article and a link to the article webpage.

The metadata provided by the archive may differ: for example, ArXiv does not provide keywords as opposed to HAL.

Additional metadata are generated by Episciences: volume, section, and submission/publication information e.g.:

In addition to the metadata, Episciences provides:

- Export facilities: BibTex, XML-TEI, Dublin-Core
- The provision of a DOI for each article
- Sharing information with social networks: Facebook, Twitter, etc.
Good to know: When files are recovered from ArXiv, they are associated to the most recent version of their metadata.

2.2. Overall ergonomics

To facilitate the management of the articles, Episciences displays the following information on the webpage of the article:

Information available to the Journal's Editorial Board:

- Volume or/and section that the article belongs to
- Depending on the Journal policy, the ratings of the article can be hidden or displayed on the article web page
- Review progress and reviewers management
- Assigned editors with the possibility to contact them directly from this page
- Details of the ratings and previous review reports (if there are several versions)
- History a detailed log of what is happening on the article (Who? What? When?) and for each available version (one tab per version) ; a different color for each type of action ; possibility to search by content or date

- Article status
- Article versions beside the title of the article, access to previous versions
2.3. Dashboard

The dashboard gives an overview of the tasks you can perform. The journal management box (only accessible to the chief editor and editors) lists all articles of the platform, organised by status.

Check easily which action you have to do
1/ Invite reviewers
2/ Follow the review process
3/ Make a decision on an article

More precisely, the “assigned articles” box displays your assigned articles. This implies that an action is expected (inviting reviewers, take a decision on an article, ask for revision...)

---

**Journal management**

- **36** articles without any reviewers
- **7** articles waiting for reviewing
- **2** articles being reviewed
- **16** reviewed articles
- **8** articles waiting for minor revision
- **1** article waiting for major revision
- **20** published articles
- **3** refused articles

**Total: 93 articles**

- Administerate articles
- Administer volumes
- Rating Grids
- Journal settings

**Assigned articles**

- **2** articles without any reviewers
- **1** article being reviewed
- **4** reviewed articles
- **2** articles waiting for minor revision
- **1** article waiting for major revision
- **10** published articles
- **1** refused article

**Total: 21 articles**
The “My submissions” section lists the articles that the user has submitted to the journal. Since editorial board members or reviewers may also be authors and want to publish in the journal, all users have their own submission section.

**Good to know:**
If an editor wants to submit an article as “author” the system is able to hide the confidential information about his submission. This way he/she cannot see any information about the status of the article, the name of the reviewers and the evaluation reports.

The “My reviewing” section lists the articles that the user has reviewed or need to review. This list is also organised by status. Since members of the editorial board may also be reviewers of some papers, all users with a reviewer role have their own reviewing section.

The “My account” section summarizes the user’s rights and gives access to the user profile where settings can be changed (add a picture, a phone number, add a link to a CV or webpage...)

Update 2016-03-04 (Inria, CCSD)
3. Customising the journal settings (Journal management > Review > Settings)

Several journal parameters can be managed from this page. The **global parameters** list the relevant scholarly domains for the journal. More than one domain can be associated to a given journal, and are determined when the journal is being set up. The topics will be useful for the future, to classify all Episciences journals in a dedicated portal.

The **ISSN** of the journal and a **description** are also available here. For the moment, that information is not displayed in the journal description.

### 3.1. Submission parameters
The submission parameters list the authorized online repositories where pre-prints can be deposited by authors before being peer reviewed. The editorial board can set up here the repositories that will link to their journal. Several of them may be selected. To select one repository, simply click on it.

Good to know:
To select several archives, hold “Ctrl” and click all corresponding fields.

3.2. Withdraw an article
A submitter can withdraw a submitted article only if the review has not started.

3.3. Other parameters associated to the review process
Other parameters can be activated or deactivated:
• The capacity for authors to suggest reviewers or editors (if this box is ticked, the author will have the possibility, when submitting his/her paper, to enter in a text box the name of a reviewer for his/her paper – this information will simply be provided to the editor, the paper will of course not be automatically assigned to the suggested reviewer)
• Or, on the contrary, specify unwanted reviewers.

The Editor-in-Chief can choose among those parameters the journal policy about the editor choice by the authors when they deposit their contributions

3.4. Communication, rating reports on article webpage
A parameter can be defined to allow (or not), the communication between reviewers and authors during the evaluation process of the paper and to display (or not) the ratings on the article webpage.

Good to know:
1/ The decision to display the reports on the article web page can be taken individually for each volume if a specific rating grid exists for this volume, with the criteria available to the “public”
2/ The anonymity of the reviewers is ensured
3/ To allow this feature, at least one criteria of the rating grid must have been set to “public” status
3.5. Invitations

The “delay before invitation expires” denotes the time for which the invitation is active. After this delay, the invitation is disabled, but the editor of the article may renew it.

3.6. Rating settings

A rating delay can be settled to define the time necessary to review an article. A choice is possible between days, weeks or months. This step is necessary if the editorial team wishes to set up automatic reminders. The delay defined here will be useful to start the reminding process.
3.7. Editors settings and privileges

Settings are available to define:

- How many reviews are needed before taking a decision about an article (0, *)
- Editors’ encapsulation, i.e. if editors are only allowed to see articles assigned to them
- If the journal allow editors to take final decision about articles. Watch out that by allowing this, the editors in chief will not be able to cancel the publication.
- And if editors can edit the mail templates for the journal
3.8. Special Issues

What is a Special Issue?
Special issues contain collections of papers on a specific topic. They are managed by an editor who is responsible for the selection of contributions to the special issue. Note that all special issue papers can also be found as ordinary contributions. Typically, a set of paper is accepted for publication at a conference that is associated with a specific journal. An “Editor”, or sometimes a “Guest Editor” invites a selection of author to submit a paper after the conference in a Special Issue of the journal.

The special issues settings offers:

- **Access code**: a specific code is generated to restricting the submission of papers in a specific special issue (to prevent people from submitting to a special issue by accident). When an author enters the code, his paper will automatically be submitted to the special issue.
- **Encapsulated reviewers**: reviewers of a paper are only visible for the editors and the Editor-in-Chief. An editor cannot see reviewers (past or present) of other editors. This means that reviewers invited on an article of a special issue will only be available in this special issue (except if they already have been invited on a "classic" paper).
- **Editor reassignment**: an editor can re-attribute an article to another editor of the same special issue, if the option is activated.

3.9. Automatic reminders

Automatic reminders are intended to reduce the monitoring overhead of the editorial workflow.
Let the system relaunch late reviewers that either did not answer to an invitation or did not provide their review

The menu to configure the reminder is:
**Journal Management > Mail > Automatic reminders**

The automatic reminders is based on two principles:
Update 2016-03-04 (Inria, CCSD)

- Define a rating delay (see above Journal Management > Review > Settings)
- Configure the reminders

There are six types of automatic reminders:

- **Unanswered reviewer invitation**: a reminder to alert the reviewer who did not answer to a review invitation. This reminder can also be used to inform the editor who sent the invitation.
- **Reminder before reviewing deadlines**: a courtesy reminder to alert the reviewers (who has already accepted the review), some days before the deadline. This reminder can also be sent to the article editor.
- **Reminder after reviewing deadlines**: a reminder to send a notice to a reviewer (who has already accepted the review, but happens to be late in delivering), after the deadline. This reminder can also be sent to the article editor.
- **Reminder before revision deadlines**: a courtesy reminder to inform the author or the editor, that the revision deadline (after a revision request has been submitted) is coming close.
- **Reminder after revision deadlines**: a reminder to alert the author or the editor that the revision deadline (after a revision request has been submitted) is past.
- **Insufficient number of reviewers**: a reminder to alert the article editor that there is not enough invited reviewers. The number of required reviewer invitations is defined by the “Minimum ratings count” parameter, in the “Journal Settings”.

To configure the reminder, click on the button “Add a reminder”

![Add a new reminder](image)

Then, a new window will open with a list of parameters to define the type of reminder you need (between the three types available from the drop-down menu).

The **delay box** is a mandatory field and must be expressed in a number of days. The event linked to the delay field depends upon the reminder type.

The “recipient” field allows one to choose who will receive the reminder. Available choices depend on the selected type of reminder.

The “repetition” field allows one to choose if the reminder has to be sent only once, or on a regular basis (every day, every week, every two weeks, or every months).

There is no limit to the number of reminders, which allows the managers of a journal to define several levels of notices.
**Automatic reminders**

- unanswered reviewer invitation - reviewer copy (7 days)
- unanswered reviewer invitation - editor copy (7 days)
- Unanswered reviewer invitation - reviewer copy (14 days)
- Unanswered reviewer invitation - editor copy (14 days)
- Reminder before reviewing deadline - reviewer copy (1 day)
- Reminder after reviewing deadline - reviewer copy (1 day)
- Reminder after reviewing deadline - reviewer copy (2 days)
- Reminder after reviewing deadline - reviewer copy (3 days)
- Reminder after reviewing deadline - editor copy (7 days)
- Reminder before revision deadline - editor copy (2 days)
- Not enough reviewers - editor copy (1 day)

Add a new reminder

**For example:**

- An automatic reminder for an unanswered review invitation can be send 7 days after the invitation
- A reminder before reviewing deadline can be sent 1 day before the review deadline. The default review deadline is calculated on the base of the default review delay, which has to be set in the “Journal Settings.”
- A **first reminder** after reviewing deadline can be sent 1 days after the review deadline
- A **second reminder** after reviewing deadline can be sent 2 days after the review deadline

A default template is provided but a customisation of reminders is always possible by clicking the menu. Click on submit to save your reminders.
Good to know:
If your Journal has a multilingual setting, make sure that there is a template for each available language. Episciences users can select their preferred language, which will be used in the system for choosing the correct template to be used.

Important:
Note that the sending of the reminders is done at 00:00 MEST every day.
All messages are visible in: Journal Management > Mail > History
4. Managing users (Journal management > Users)

To invite new users (authors, reviewers or editors), the editor-in-chief can:

Select them from the user database:

Or create an account for them:

To create an account, the required fields are:

- a valid email address,
- a username and
- a password (please note that the username can not be modified after the account is created)

As both a password and a username are required, it is strongly recommended that users create their account themselves. The editorial team will then be able to retrieve them in the user base.
Users already enrolled in the journal can be given additional roles. By default they are “members” of the journal, whose only right is to submit an article.

To enrol a user into an additional role, click the arrow in the “rights” column and select further roles.

4.1. Dynamic display of the editorial staff members

A specific webpage is available to for editorial staff members listing. This page displays the members who have the following status: Editor in Chief, Editor, and Editorial secretary.

To set up this specific page: Website > Menu > add a page “Editorial Staff Member”

Update 2016-03-04 (Inria, CCSD)
4.2. Specific case: invite a reviewer without an account

To facilitate the management of the reviews, it is possible to invite a new user without a prior Episciences account.

To do this, click on the box “invite a reviewer” by going to the article management page:

According to the case, select the right option between “known reviewers” and “new reviewer”:

News reviewer > New User:
Complete the form and click on “next” to display the e-mail invitation, which can be modified if necessary:
After this step, the invitation appears as a « pending invitation » with all details: name, account status, dates of the important steps such as rating date.

By clicking on the arrow more details are available:

From this block, it is possible to directly send an e-mail to the reviewer, or to change the deadline of the review, or to remove the reviewer.
Once an invitation has been sent, the user receives an email:

```
Dear Anna Lite,

You have been invited to review the following article: "#59 - Free-ocean CO 2 enrichment (FOCE) systems: present status and future developments".
Please tell us if you accept or not, by going to this page:
http://epijinfo.episciences.org/reviews/invitation/id/323/lang/en/tmp/139aa7a7e867a4d80335cb41252b156b4

If you accept to review this article, you will have to sign up on Revue preprod en Info before going any further. It will only take a few minutes to create your account.

Without any answer from you within 1 month, we will consider that you were not interested. In case you accept this Invitation, your rating will be due before the 2016-04-10.

Sincerely yours,
--
Episciences.org

As a reminder, your login is : undefined
```

By clicking on the link, the user is redirected to a page where he has to tell if he agrees to review the article or not.
By clicking to the button “I agree to review this article”, the new reviewer is invited to complete a subscription form:
After submitting, the user becomes a reviewer, and is redirected to his dashboard with an access to the article that is to review:
5. Managing volumes (Journal management > Review > Volumes)

5.1. Volumes operating rules

Volumes consist of the following components: a name, a description and a status (open/closed).
To create a volume, the name is the only mandatory field.

- Several volumes may be active at the same time: current Issues, special Issues...
- Authors can submit articles to any of the open volumes: be careful of which rating grid you are using for each volume
- Articles can be shifted from one volume to another during the peer-review process by the editor-in-chief (but not after publication).
- Articles cannot be submitted to a volume whose status is closed, but it is still possible for editors to move an article (before its publication) to a closed volume.
- There can be as many (open or closed) volumes as necessary.
- Once an article is published into a volume, it is not allowed to change the volume.
- The list of the volumes can be sorted by drag and drop.
- There is no possibility to distinguish between “volume” and “issue”. The syntax includes the two component such as “Volume 1, Issue 1” or “Volume 1, Issue2” etc.

![Volumes Table]

- Display 10 lines

<table>
<thead>
<tr>
<th>Title</th>
<th>Editors</th>
<th>Special</th>
<th>Current</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special EpIJAM issue (access code: 56286ea3a7e2c)</td>
<td>3 editors</td>
<td>Yes</td>
<td>Yes</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>LMCS Special issue test (access code: 563ba8bc41a1f)</td>
<td>4 editors</td>
<td>Yes</td>
<td>Yes</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>Special Issue on Scientific Information Knowledge (access code: 569750a001a2)</td>
<td>2 editors</td>
<td>Yes</td>
<td>Yes</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>Special Issue on Lexical data modeling</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>test volume</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Open</td>
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<tr>
<td>test volume</td>
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<td>-</td>
<td>-</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>LMCS Test Volume</td>
<td>-</td>
<td>Yes</td>
<td>-</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>volume 3/1</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>Vol. 3, No 1</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>

Lines 1 to 10, of 16
Attributes of the volume:
- Editors (0,*): the number of editor is displayed ; a pop up is available to see their name

Options available for each volume:
- Status (open, closed)
- Current volume (yes, no): used to display “Browse by current issues”
- Special Issue (yes, no): if ‘yes’ is chosen, an access code is generated
- Add a metadata (file, name, content)

When you have finished editing a field, do not forget to save its content by clicking on the + sign. Then go to the next field.
To create the new volume, click on the submit button.

Please note: The language specified next to the + sign is the one of the version you are currently working on. If needed, the website can be multilingual.

For the moment, the descriptive text for the volume is not displayed on the website, but this could change in the future.
5.2. Dynamic display of the articles

Only accepted articles can be displayed through the dynamic display provided by Episciences. Specific types of dynamic webpage are available to organise the display of the available articles of the Journal:

- Latest article: display the 5 latest articles
- Browse by author (alphabetical list of the authors)
- Browse by volume
- Browse by section
- Browse current issue for volume which have the status of “current”

5.3. RSS feed

This specific webpage generates a RSS feed. A link to this webpage can be created from any other page without having to create this page.

- In the editing part of a web page, insert an icon or a text for the link to the RSS
- Select it, click on the “toolbar” insert link
- In the URL field enter: “/rss/papers”
- Validate and submit
• By default, the feed is fetching the 20 latest elements. If you need to fetch a custom number of results, it is possible to add a parameter:

/rss/papers?max=50 or /rss/papers/max/50

6. Managing sections (Journal management > Review > Sections)

Several journal sections may be open at the same time. Authors can submit articles to any of the open sections. Articles can be shifted from one section to another during the peer-review process by the editor-in-chief (but not after publication). Articles cannot be submitted to a section whose status is closed. There can be as many sections as needed.

Please note:
Articles belonging to one section can be part of one or several volumes and the articles of a volume may belong to different sections.
Sections consist of three components: a name, a description, a status and a board of editors in charge.

Similarly to volumes, the name of a section is the only mandatory field. For the moment, the descriptive text for a section is not displayed on the website but this could change in the future.
7. Building a rating grid (Journal management > Review > Rating grids)

7.1. Setting up the rating grid

Before any reviewing can be performed, a rating grid has to be defined. This includes a variety of pre-set points to guide your reviewers and collect consistent feedback.

There is a default grid, which the editorial board must set up prior to any reviewing activities. Additional ratings grids can be added, targeting specific section needs or distinguishing between normal volumes and conference proceedings.

When creating a new rating grid, it is possible to copy the default grid and modify it or to start the grid from scratch. The different criteria can be sorted manually by drag and drop.

A grid consists of as many criteria as needed. It is also possible to add separators, which will allow to sort criterion in labelled sections.

To define a criterion, a name must be provided, (e.g. scientific relevance) as well as a description (some guidelines that help reviewers understand what is expected from them – this is optional). Further settings can also be defined/

Each criterion has several attributes:
- Name
- Description
- Visibility (public, contributor, editors)
- Evaluation type (qualitative, quantitative, free rating)
- Coefficient
- Comment (yes, no)
• File upload (yes, no)

Depending on the chosen evaluation type, there are many be others attributes:
• Coefficient
• Rating type (standard, customized)

The visibility criterion is important to prevent or to allow the display of evaluation reports to the author, to the editors only or to the public.
If criteria are not considered equally important, a coefficient can be set up. Higher coefficients have a higher weight. The different weight will determine the final grade.

A general comment function is available when the reviewer sends out his review, but it might be relevant to have comments about a specific criterion.
File upload can also be activated or de-activated. If you wish the reviewer to be able to comment on the original text and include the annotated version in his/her review, this option should be selected.

At last, if the criterion type is “quantitative rating” or “qualitative rating”, the rating type has to be set up. You can choose between default or custom rating types. Customized rating
allows to enter an unlimited number of personalised rating values. Customized rating values can be labelled (not mandatory) and can be sorted by drag and drop.

- Quantitative rating: grading on a scale (0-10) ; (0-5) ; (customized rating)
- Qualitative rating: (yes, no, maybe) ; (customized rating)
- Customized rating: add comments or/ and file upload

Once all fields have been filled, click the submit button to create the new criterion.

7.2. Specific case if any rating grid is expected?

Some generic criteria can be set up such as “outcome” with a customized rating such as: reject, accept, and revise...
8. Managing articles (Journal management -> Article management)

After having set up the reviewing parameters, the peer review process can take place. The editorial board must assign papers to editors and reviewers and follow up after they have provided a feedback.

**Good to know:**
Once the review process begins, an author can’t remove his submission. An author can remove his article if no review has started yet.

By default, the article management section lists all articles submitted to the journal, regardless of their status. However they can be filtered by status, volume and/or section; clicking on the desired criterion will filter the results.

Clicking on the title gives access to the summary page of a paper. The abstract and basic information can be found on this page and following actions can be performed: assign reviewers or editors, move the paper to a volume and/or section, access the review history and (as the editor-in-chief) accept, reject or send a request for modifications.
Before the article’s acceptation, it is possible to change the volume or the section of the article.

The reviewer section displays all useful information about the status of the review with all details.
The ratings section displays, after clicking on a reviewer’s name, the result of the evaluation.
The history section shows logs of every event that occurred concerning the article. Soon, there will also be access to the content of the sent mails from this journal logs.

The article status section allows the editor to take a decision about the article: accept, reject, or ask for revision (minor or major).

At this step, some decision can be taken for the article.

**Note:** after a “ask for revision” the author must upload a new version of the article. This implies that the author, first, deposits a new version of the article in the corresponding archive.
8.1. Assigning an article to reviewers/editors

Reviewers can be selected from the reviewer database by clicking on the “invite a reviewer” button.

A pop-up window opens and users with the appropriate role will appear on the drop-down menu.
If you can’t find the person you are looking for, go to the user management page and verify he/she has an account on the platform and is enrolled as a reviewer (another reason could be that an invitation has already been sent to this reviewer for this article).
The invitation message can be sent as shown in the template or can be customized by changing the e-mail type.

**Good to know:**
In the template, fields starting with %% will automatically be completed by the system. The list of the variable of the templates is available in the Annex.

The language of the email automatically matches the settings selected by the reviewer.

### 8.2. What if the reviewer does not exist in the database?

**Important:** See the “Specific case: invite a reviewer without account” section of this documentation to invite reviewer who does not have an account.

### 8.3. Editors

The same procedure applies to the selection of editors in charge of an article.

By default, if a paper is submitted to a specific section of the journal, it will be assigned to the editors in charge of that section.

When an author submits a paper, if he has chosen one or several editors, these editors will be automatically assigned to the paper.

If he didn’t choose any editors, but submitted his paper in a specific section, editors in charge of this section will be assigned to the paper.

Otherwise, the Editor-in-Chief will be assigned to the paper.
8.4. Article reassignment

For the Special Issues only, a feature allows an editor to reassign the management of an article to another editor by clicking on the red button. This is useful in case of overwork.

This option must be activated in “Special Issues Settings” > Editors can reassign handled articles to another editor.
Once reviewers have sent their review, the editor in charge of the paper is notified. Depending on the journal settings, the editor will be able to take a decision, or suggest a decision (accepting, refusing or sending a request for modifications).

8.5. Making a decision
E-mail is prepared and editable for customization: revision deadline, subject, content, “tag” additions etc. The “To”, “From”, and “Reply to” fields are displayed only for information purpose and cannot be edited.
Update 2016-03-04 (Inria, CCSD)

Invite a reviewer

From: Gaëlle Rivièreux <gaëlle.rivièreux@inria.fr>
Recipient: Lite Anna <gaelle.rivièreux@yahoo.fr>
Rating due date: 2016-05-04
Subject: epijinfo #105 - You’ve been invited to review an article
Message:

Lite Anna,
You have been invited to review an article called "Higher-Order Recursion Schemes". Please tell us if you accept or not within 30 days.

If you accept to review this article, you will be informed about your participation in your CCSD services, such as HAL, Epinorm, etc.

Without any answer from you within 30 days, we will consider that you were not interested. In case you accept this invitation, the rating due date will be 05-04.

Sincerely yours,
--
EpiSciences.org

As a reminder, your login is : anna:5fth

Available tags:

- Invitation answer maximum delay
- Invitation answer form URL
- Journal code
- Journal name
- Paper id
- Article title
- Recipient full name
- Recipient e-mail address
- Recipient identifier
If the editor cannot take a decision and make a suggestion, the Editor-in-Chief can make a decision based on his feedback: accept the article, as it is, reject it, or ask for a new version. In all cases the author will be automatically notified.

**8.6. Asking for a revision of the paper**

After clicking “ask for a revision” button, a text box appears where the Editor-in-Chief can give his feedback and provide further instructions to the author.

Then, the author is notified:

---

**Member Text,**
The editorial board requests you to bring some minor modifications to your article (#113 - Formal Proof of Soundness for an RL Prover), submitted the January 14, 2016.

Please find the reports below.

Sincerely yours,
...
Episciences.org

As a reminder, your login is: username

---

After this notification the author can access his article by going to his dashboard:

---

25 pending articles
1 article waiting for minor revision
7 accepted articles

Total: 40 submitted articles

- List all my submissions
- Submit an article

---

He accesses his article by clicking on its title.

The “revision request” section displays the report and offers the possibility to answer, to send a temporary version only visible in the Episciences system or to upload a new version from an archive repository.
8.7. How answer after “ask for revision” notification

After the author receives an “ask for revision” notification he has three ways to answer it.

**Answer without any modifications:**
This choice opens an editable block to ask for clarifications.
Send a temporary version:
A file upload is available with a comment field. This will generate a temporary version only visible in Episciences.

Upload a new version:
A new version can be sent after a deposit in the original archive. Then, the author has to complete the form with the document identifier, the Nr. of the version and the repository.

A new reviewing round of the paper will be initiated when the revision request is sent. The paper status will become “pending modifications” and the author will be notified.

When they upload a new version, the paper’s status will return to “under review” and the editors and reviewers will be informed that a new version is available. By default, the same editors and reviewers are selected, but others can also be added.

The next round of the review can take place.
8.8. Accept / Reject a paper

The Editor-in-Chief can accept an article by clicking the “accept paper” button.

Once the article has been accepted, the author, the Editor-in-Chief and the Editors will be notified and the pre-print on the online repository will be upgraded to a journal article. The bibliographical information stored on the online repository is automatically updated with the journal name, publication date, etc.

The Editor-in-Chief can reject an article by clicking the “reject this article” button. Again he has the possibility to add a message to the author that will be added to the notification email.

8.9. After the publication: Update of the archive

Once an article has been published, some metadata are automatically sent.

On ArXiv, the “Journal reference” field is added, containing the bibliographic citation (see this page for example).

On HAL, it is not implemented yet.

9. Mailing tool (Journal management > Mail > Mailing)

9.1. Mail

A mailing tool is available on the platform to contact users.
You can either send a message to a specific user or send a collective email to a group of recipients by selecting their role in the journal.
The available fields allow:

- to change the information in the fields “from” and “reply to”
- to select a slot of recipient by clicking to the “To” label, then a new window is open. All contacts or just a selection (by name, by role) can be selected for the mailing. After the selection of the recipient, click on “submit” and close the window.
- The labels CC and BCC allow to add recipients too

9.2. Templates
Templates

Paper - comments
- Reviewer's comment about a paper (author copy)
- Reviewer's comment about a paper (editors copy)
- Author's answer to a reviewer's comment (reviewer copy)
- Author's answer to a reviewer's comment (editors copy)

Paper - editors assignment
- Unassign an editor
- Assign an editor

Paper - editor suggestions
- Article monitoring: acceptance proposal
- Article monitoring: refusal proposal
- Article monitoring: revision request proposal

Paper - final decision
- Accepted article
- Refused article
- custom_paper_accepted_tmp_version_tpl_name

Paper - reviewing
- Unassign a reviewer
- Completed rating (reviewer copy)
- Completed rating (editors copy)
- Reviewer assignment to a new version of an article
- Reviewer assignment to a temporary version
- Accepted reviewer invitation (reviewer copy)
- Invite a user to review an article - user does not have an account yet
- Invite a user to review an article - existing reviewer
- Refused reviewer invitation (reviewer copy)
- Refused reviewer invitation (editors copy)
- Accepted reviewer invitation (editors copy)
- Updated rating deadline
- Invite a user to review an article - existing user
- Reviewer removal
- paper_reviewer_invitation_tpl_name

Automatic reminders
- Reminder before reviewing deadline
- Not enough reviewers
- Reminder after revision deadline (editor copy)
- Reminder before revision deadline (editor copy)
- Reminder after revision deadline (author copy)

All templates can be modified to better fit the needs of the editorial board. To do so, click on the "edit" icon on the right hand side. The variables used by the template are available in the Annex of this document.
The name, subject and content of the message can be customized. You can refer to the variables listed in the Annex at the end of this guideline to change the “tags” used by the mailing module.

9.3. Mail history

The mail history section lists all messages (automatic notifications and emails) sent via the platform.
Subject, paper identifier, and recipients can filter the list.

It is possible to show or hide columns, for better visibility:
10. Annex

Variables to insert in mail templates

User account

User registration (user_registration)
Recipient: User who’s just created an account
Tags :
%%REVIEW_CODE%% => Journal code (Ex : JDMDH)
%%REVIEW_NAME%% => Journal name (Ex : Journal of Data Mining and Digital Humanities)
%%USERNAME%% => Recipient ID (Ex : gaëlle_riverieux)
%%SCREEN_NAME%% => Recipient Screen Name (Ex : Gaëlle R.)
%%FULL_NAME%% => Recipient First Name and Last Name (Ex : Gaëlle Rivérieux)
%%TOKEN_VALIDATION_LINK%% => Account activation link

Lost password (user_lost_password)
Recipient : user who forgot his password
Tags :
%%REVIEW_CODE%% => Journal code
%%REVIEW_NAME%% => Journal name
%%USERNAME%% => Recipient ID
%%SCREEN_NAME%% => Recipient Screen Name
%%FULL_NAME%% => First Name and Last Name
%%TOKEN_VALIDATION_LINK%% => Token validation link

User lost login (user_lost_login)
Recipient : user who forgot his password
Tags :
%%REVIEW_CODE%% => Journal Code
%%REVIEW_NAME%% => Journal Name
%%MAIL_ACCOUNT_USERNAME_LIST%% => Account User List

Article - Submission

New article – Author’s copy (paper_submission_author_copy)
Description : Article’s submission confirmation
Recipient : Article’s tenderer
Tags :
%%REVIEW_CODE%% => Journal Code
%%REVIEW_NAME%% => Journal Name
%%USERNAME%% => Recipient ID
%%SCREEN_NAME%% => Recipient Screen Name
%%FULL_NAME%% => First Name and Last Name
%%ARTICLE_ID%% => Article ID
%%ARTICLE_TITLE%% => Article title

New article – Editor’s copy (paper_submission_editor_copy)
Description : Notification informing the editors that a new article has been submitted
Recipients : all article’s editors
Tags :
%%REVIEW_CODE%% => Journal Code
%%REVIEW_NAME%% => Journal Name
%%USERNAME%% => Recipient ID
%%SCREEN_NAME%% => Recipient Screen Name
Deleted article – Author’s copy (paper_deleted_author_copy)

Description: Confirmation of removal of an article by its author
Recipient: Article’s author
Tags:

%%REVIEW_CODE%% => Journal Code
%%REVIEW_NAME%% => Journal Name
%%USERNAME%% => Recipient ID
%%SCREEN_NAME%% => Recipient Screen Name
%%FULL_NAME%% => First Name and Last Name
%%ARTICLE_ID%% => Article ID
%%ARTICLE_TITLE%% => Article title
%%SUBMISSION_DATE%% => Article’s submission date

Deleted article – Editor’s copy (paper_deleted_editor_copy)

Description: Notification informing the editors that an author has deleted his article
Recipients: all articles editors
Tags:

%%SUBMITTER_NAME%% => Author’s Last Name and First Name
%%REVIEW_CODE%% => Journal Code
%%REVIEW_NAME%% => Journal Name
%%USERNAME%% => Recipient ID
%%SCREEN_NAME%% => Recipient Screen Name
%%FULL_NAME%% => First Name and Last Name
%%ARTICLE_ID%% => Article ID
%%ARTICLE_TITLE%% => Article title
%%SUBMISSION_DATE%% => Article’s submission date

Deleted article – Reviewers copy (paper_deleted_reviewer_copy)

Description: Notification informing the editors that an author has deleted his article
Recipients: all articles editors
Tags:

%%SUBMITTER_NAME%% => Author’s Last Name and First Name
%%REVIEW_CODE%% => Journal Code
%%REVIEW_NAME%% => Journal Name
%%USERNAME%% => Recipient ID
%%SCREEN_NAME%% => Recipient Screen Name
%%FULL_NAME%% => First Name and Last Name
%%ARTICLE_ID%% => Article ID
%%ARTICLE_TITLE%% => Article title
%%SUBMISSION_DATE%% => Article’s submission date

Article – Editor assignation

Editor assignation (paper_editor_assign)

Description: Alert informing the editor that has been assigned to an article
Recipient: editor assigned to the article
Tags:

%%REVIEW_CODE%% => Journal Code
%%REVIEW_NAME%% => Journal Name
%%USERNAME%% => Recipient ID
%%SCREEN_NAME%% => Recipient Screen Name
%%FULL_NAME%% => First Name and Last Name
Editor assignment deletion (paper_editor_unassign)

**Description** : Alert informing the editor that his assignment to an item has been removed

**Recipient** : the writer whose assignment was deleted

**Tags** :

- %REVIEW_CODE%% => Journal Code
- %REVIEW_NAME%% => Journal Name
- %USERNAME%% => Recipient ID
- %SCREEN_NAME%% => Recipient Screen Name
- %FULL_NAME%% => First Name and Last Name
- %ARTICLE_ID%% => Article ID
- %ARTICLE_TITLE%% => Article title
- %SUBMISSION_DATE%% => Article’s submission date
- %PAPER_URL%% => Link to article management

Article - Review

Invite a user to review an article (paper_reviewer_invitation)

**Tags** :

- %REVIEW_CODE%% => Journal Code
- %REVIEW_NAME%% => Journal Name
- %USERNAME%% => Recipient ID
- %SCREEN_NAME%% => Recipient Screen Name
- %FULL_NAME%% => First Name and Last Name
- %ARTICLE_ID%% => Article ID
- %ARTICLE_TITLE%% => Article Title to review
- %URL%% => Invitation reply form url

Completed review – Reviewers copy (paper_reviewed_reviewer_copy)

**Description** : Message of thanks to the reviewer, following a complete review

**Recipient** : reviewer

**Tags** :

- %REVIEW_CODE%% => Journal Code
- %REVIEW_NAME%% => Journal Name
- %USERNAME%% => Recipient ID
- %SCREEN_NAME%% => Recipient Screen Name
- %FULL_NAME%% => First Name and Last Name
- %ARTICLE_ID%% => Article ID
- %ARTICLE_TITLE%% => Article title
- %SUBMISSION_DATE%% => Article’s submission date
- %PAPER_URL%% => Link to article management

Completed review – Editors copy (paper_reviewed_editor_copy)

**Description** : Notification warning editors a reviewer has completed its review

**Recipients** : all articles editors

**Tags** :

- %REVIEWER_FULLNAME%% => Nom complet du relecteur
- %PAPER_RATING%% => Relecture de l’article
- %REVIEW_CODE%% => Journal Code
- %REVIEW_NAME%% => Journal Name
- %USERNAME%% => Recipient ID
- %SCREEN_NAME%% => Recipient Screen Name
- %FULL_NAME%% => First Name and Last Name
- %ARTICLE_ID%% => Article ID
Reassignment of a reviewer following a new version of an article (paper_new_version_reviewer_reassign)
Recipients: all articles editors
Tags:

- %REVIEW_CODE% => Journal Code
- %REVIEW_NAME% => Journal Name
- %USERNAME% => Recipient ID
- %SCREEN_NAME% => Recipient Screen Name
- %FULL_NAME% => First Name and Last Name
- %ARTICLE_ID% => Article ID
- %ARTICLE_TITLE% => Article title
- %NEW_VERSION_SUBMISSION_DATE% => Article’s submission date d’origine
- %NEW_VERSION_URL% => Link to article (original version)
- %NEW_VERSION_SUBMISSION_DATE% => New version submission date
- %NEW_VERSION_URL% => Link to article’s new version

Reassignment of a reviewer to a temporary version (paper_tmp_version_reviewer_reassign)
Recipients: All articles editors
Tags:

- %REVIEW_CODE% => Journal Code
- %REVIEW_NAME% => Journal Name
- %USERNAME% => Recipient ID
- %SCREEN_NAME% => Recipient Screen Name
- %FULL_NAME% => First Name and Last Name
- %ARTICLE_ID% => Article ID
- %ARTICLE_TITLE% => Article title
- %PAPER_SUBMISSION_DATE% => Article’s submission date
- %TMP_PAPER_SUBMISSION_DATE% => Submission date of the temporary version
- %PAPER_URL% => Link to article
- %TMP_PAPER_URL% => Link to the review page of the temporary version

Reviewer comments about an article – copy to author (paper_comment_author_copy)
Recipient: Article’s author
Tags:

- %REVIEW_CODE% => Journal Code
- %REVIEW_NAME% => Journal Name
- %USERNAME% => Recipient ID
- %SCREEN_NAME% => Recipient Screen Name
- %FULL_NAME% => First Name and Last Name
- %ARTICLE_ID% => Article ID
- %ARTICLE_TITLE% => Article title
- %SUBMISSION_DATE% => Article’s submission date
- %COMMENT% => Reviewer comments
- %PAPER_URL% => Link to article webpage

Reviewer comments on an article – editor copy (paper_comment_editor_copy) not used for the moment

Author’s answer to reviewers comments – Reviewer copy (paper_comment_answer_reviewer_copy)
Recipients: All articles editors
**Update 2016-03-04 (Inria, CCSD)**

**Tags :**

- %REVIEW_CODE%% => Journal Code
- %REVIEW_NAME%% => Journal Name
- %USERNAME%% => Recipient ID
- %SCREEN_NAME%% => Recipient Screen Name
- %FULL_NAME%% => First Name and Last Name
- %ARTICLE_ID%% => Article ID
- %ARTICLE_TITLE%% => Article title
- %SUBMISSION_DATE%% => Article’s submission date
- %COMMENT%% => Reviewer comments
- %COMMENT_DATE%% => Reviewer comments date
- %ANSWER%% => Author’s answer
- %PAPER_URL%% => Link to article webpage

Author’s answer to reviewers comments – Editor copy (paper_comment_answer_editor_copy)
Not used for the moment

**Article – Editor suggestions**

**Article monitoring : acceptance suggestion** (paper_suggest_acceptation) /
**Article monitoring : rejections suggestion** (paper_suggest_refusal) /
**Article monitoring : pending modifications suggestions** (paper_suggest_new_version)

Recipients : all editors

**Tags :**

- %REVIEW_CODE%% => Journal Code
- %REVIEW_NAME%% => Journal Name
- %USERNAME%% => Recipient ID
- %SCREEN_NAME%% => Recipient Screen Name
- %FULL_NAME%% => First Name and Last Name
- %EDITOR_NAME%% => Editor which suggests a new article status
- %ARTICLE_ID%% => Article ID
- %ARTICLE_TITLE%% => Article title
- %SUBMISSION_DATE%% => Article’s submission date
- %COMMENT%% => Comments of the editor which suggests a new status
- %PAPER_URL%% => Link to article management

**Article – Pending modifications**

**Ask for revision** (paper_revision_request)

Recipient : Article’s author

**Tags :**

- %REVIEW_CODE%% => Journal Code
- %REVIEW_NAME%% => Journal Name
- %USERNAME%% => Recipient ID
- %SCREEN_NAME%% => Recipient Screen Name
- %FULL_NAME%% => First Name and Last Name
- %ARTICLE_ID%% => Article ID
- %ARTICLE_TITLE%% => Article title
- %SUBMISSION_DATE%% => Article’s submission date
- %REQUEST_DETAILS%% => Pending modification details
- %PAPER_URL%% => Link to article management

**Answer to a pending modification – comments** (paper_revision_answer)

Description : author reply to a request for modifications issued by an editor: the author does not make any changes.

Recipients : all editors

**Tags :**
Reply to a pending modification – temporary version (paper_tmp_version_submitted)

**Description**: author reply to a request for modifications issued by an editor: the author suggest a temporary version

**Recipients**: all editor in chief

**Tags**: %REVIEW_CODE%% => Journal Code
%REVIEW_NAME%% => Journal Name
%USERNAME%% => Recipient ID
%SCREEN_NAME%% => Recipient Screen Name
%FULL_NAME%% => First Name and Last Name
%ARTICLE_ID%% => Article ID
%ARTICLE_TITLE%% => Article title
%REQUEST_DATE%% => Pending modification date
%REQUEST_MESSAGE%% => Pending modification request (text)
%REQUEST_ANSWER%% => Author answer
%PAPER_URL%% => Link to article management

Reply to a pending modification – new version (paper_new_version_submitted)

**Description**: author reply to a request for modifications issued by an editor in chief: the author suggest a new version

**Recipients**: all article editor

**Tags**: %REVIEW_CODE%% => Journal Code
%REVIEW_NAME%% => Journal Name
%USERNAME%% => Recipient ID
%SCREEN_NAME%% => Recipient Screen Name
%FULL_NAME%% => First Name and Last Name
%ARTICLE_ID%% => Article ID
%ARTICLE_TITLE%% => Article title
%NEW_VERSION_SUBMISSION_DATE%% => Article’s submission date d’origine
%NEW_VERSION_SUBMISSION_DATE%% => New version submission date
%REQUEST_DATE%% => Pending modification date
%REQUEST_MESSAGE%% => Pending modification request (text)
%PAPER_URL%% => Link to article management

**Article – Final decision**

**Accepted article (paper_accepted)**

**Recipient**: Article’s author

**Tags**: %REVIEW_CODE%% => Journal Code
%REVIEW_NAME%% => Journal Name
%USERNAME%% => Recipient ID
%SCREEN_NAME%% => Recipient Screen Name
%FULL_NAME%% => First Name and Last Name
Accepted article in a temporary version (paper_accepted_tmp_version)
Recipient : Article's author
Tags :

Accepted article in a temporary version (paper_accepted_tmp_version)
Recipient : Article's author
Tags :

Refused article (paper_refused)
Recipient : Article's author
Tags :

Refused article (paper_refused)
Recipient : Article's author
Tags :