emerald PUBLISHING

The start of your publishing journey

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Welcome to Emerald Submit

A user guide for library and consortia R&P agreement administrators

To support you in the management of your transformative agreement with Emerald, you have access to Emerald Submit, a platform developed by our partners, ChronosHub, that supports the needs of authors, institutions, consortia, and funders in driving open research.

Emerald Submit enhances the author experience through the automatic recognition and allocation of eligibility for vouchers. Customers managing open access agreements benefit from a dashboard and real time reporting, making it easy to track and report on publishing activity, easing the administrative burden.

Emerald Submit provides the managers of transformative agreements to:

- Track voucher usage in real time
- See who is using the vouchers and where they are being used
- View voucher acceptance and rejection data
- Download reports on the publishing outputs relating to your agreement
- Approve the use of a voucher by corresponding authors (if required)
- Agree the use of vouchers retrospectively, in the event a transformative agreement is signed after the start of the year.

What is Emerald Submit?

Emerald Submit is a system that supports your authors and organisation in managing the voucher and reporting process. In time, it will also support authors to:

- Search for the right venue for their work
- Check which publications are compliant with their funding sources
- Submit their work
- Manage their submissions across all Emerald journals in one place
- Find out if they are eligible for open access vouchers and waivers.

This functionality is not yet live, but we are working with our partners to bring this as soon as possible. Emerald Submit currently informs authors of their eligibility to publish openly within a transformative agreement upon acceptance.

Available now is clear and visual overviews, one-click reporting, taking the pain out of administrating organisational or consortia level submissions management.

The included Journal Finder allows you to provide current information to your authors on what agreements are in place for Emerald, giving them all the tools they need to select the best journal to publish in.

Logging In

To log in to your Emerald Submit administrator dashboard, simply use your Emerald Insight username and password.

Figure 1: log-in page

You can access Emerald Submit at the following link to login. You should have already been set-up with an admin account: https://submit.emerald.com/

Should you have any problems logging in, please contact support@emerald.com and we will resolve the issue for you as swiftly as possible.
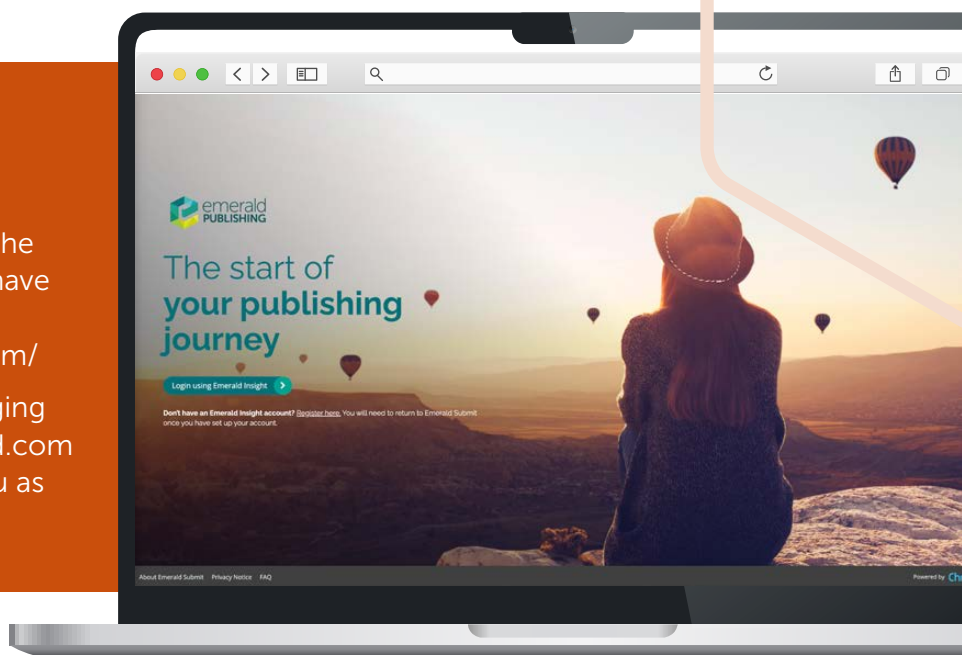
Overview

Once logged in to Emerald Submit you will see your Dashboard. From here you can access your reporting tools as well as getting an immediate overview of your consortia or organisation's publishing

Your dashboard will provide you with all the information relating to your agreement. Consortia customers can view and track the publishing activity across all the institutions within their agreement. Individual organisations will be able to see the activity relating to their institution.

Organisation / Consortia View

If you are logging in from an individual organisation, the content you see will include all the information about your own organisation's publishing and agreements.

Anyone logging in through a consortia view will be able to access overviews for the whole agreement as well as individual organisation level data. This makes Emerald Submit a flexible tool for everyone from author to consortia to use to manage their open access journey.
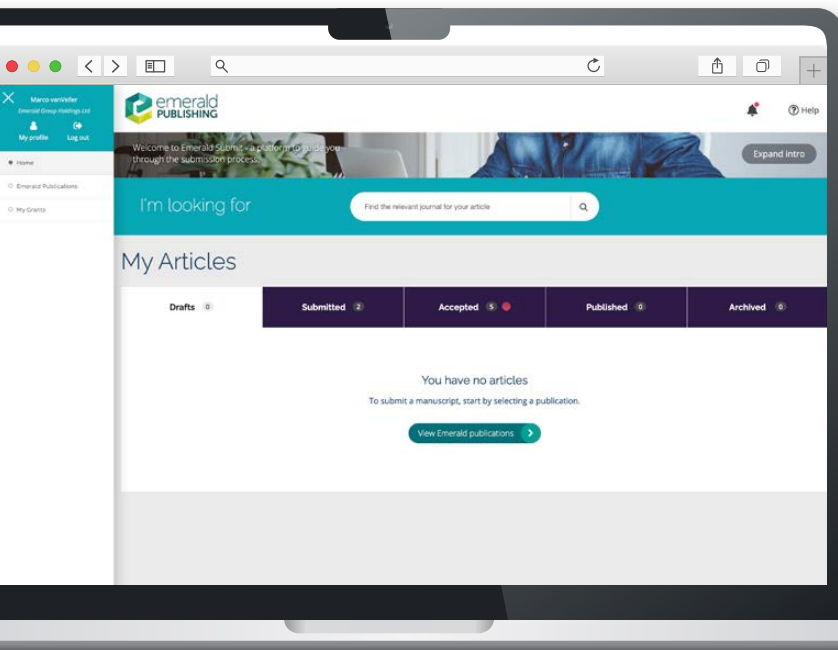
Figure 2: Dashboard

The menu on the left can be used to navigate throughout the tools available to administrators and can be temporarily hidden by using the white cross on the top left.

If you wish to see this menu again at any time, simple click the top left menu button as shown below.

Your information and reports

The lefthand menu can be used to navigate through the information and reports available to you. Here's how to use them:

Articles

You can view all articles submitted from your institution/s and see where they are in the publishing process, from accepted to published. Eventually, this will also include submitted manuscripts. This list includes articles from all Emerald journals and will include articles that are not eligible for a voucher, allowing you to see a full view of your authorship and its eligibility for OA under our agreement.

Figure 3: articles

Convenient filters allow you to search by author, or where articles are in the process and the data can be downloaded to an Excel file for easy filtering.
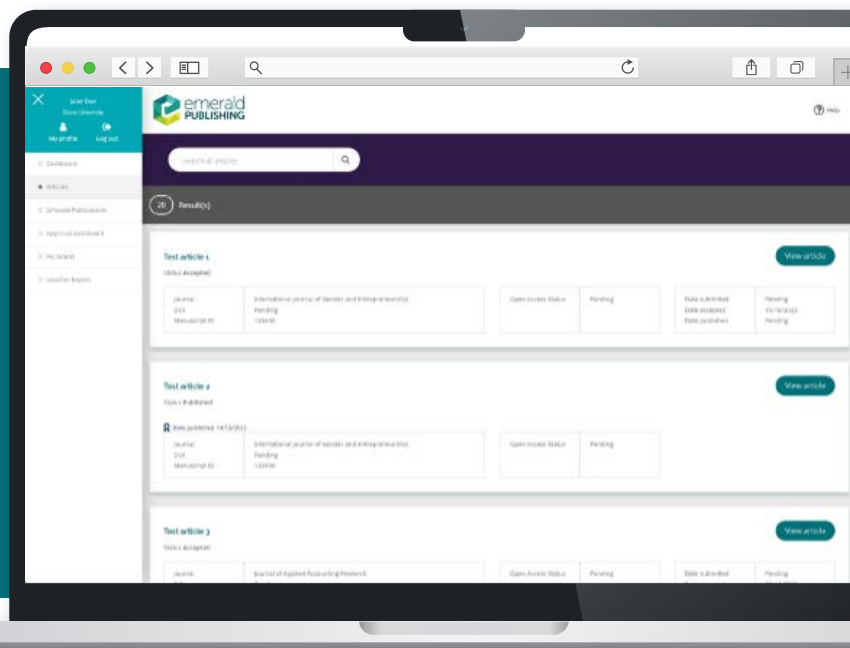
Emerald Publications

Our journal finder allows you to view a list of all Emerald publications and filter by subject areas and journal lists.

How to select your funding body

You can also check compliance with funding bodies through the 'Select Funder' function. Click on the green search box to add in a funding body, such as Wellcome Trust. Select the correct funding body from the list and save to see all compliant publications. You can also add in more than one funder. This can help you support authors who may come to your with queries about our agreement and where they can publish.

Click on the green search box to select the relevant funding body. You can input more than one funding body at a time.

Make sure once you have selected the correct funding body to save and continue your search.
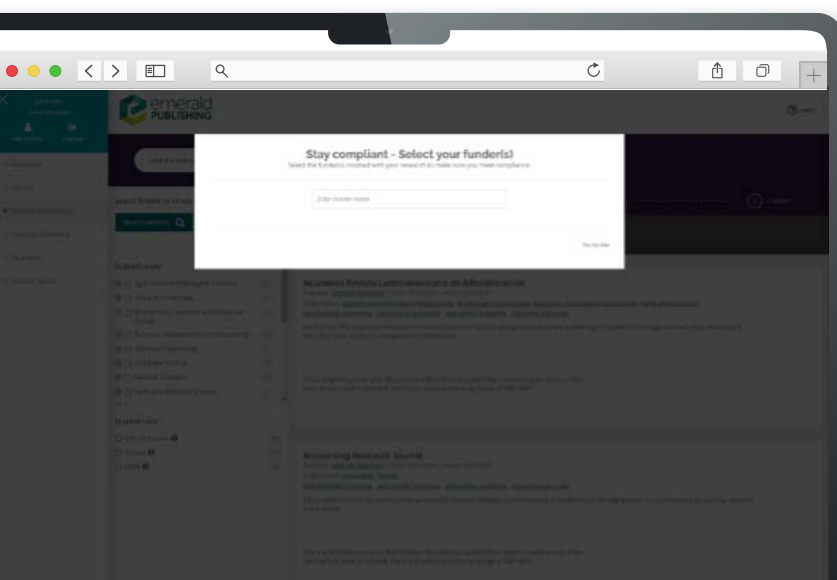

Figure 4: Emerald publications - select funder

Once you have selected your funding body, you can further narrow down your search either by using the broad subject areas from the menu on the left, or using the + buttons to narrow this down by sub topic.

Identifying publications compliant with your funding body

The purple "Compliant" banner gives you the information you need quickly.

Figure 5: Emerald publications - narrow search
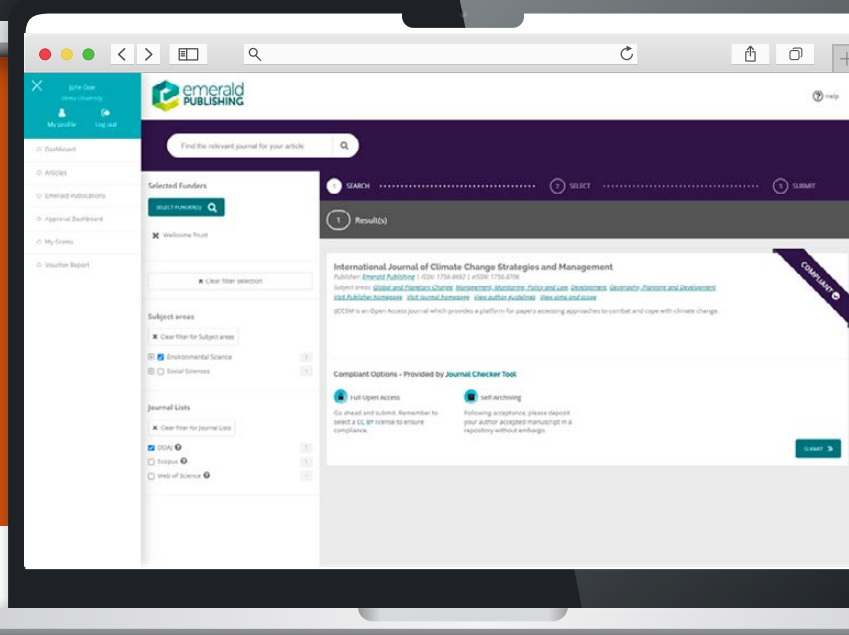
Approvals Dashboard

The Approvals Dashboard is only available where a consortium has specifically requested members can approve the use of vouchers within an agreement. Many consortia do not feel this is a necessary step. For those that do, the Approvals Dashboard allows administrators to see all the submitted papers for their organisation. Expanding the information on an article enables the administrator to see the author and paper details, leave notes and approve or reject papers for voucher allocation.

Approvals Dashboard – Administrator View

Administrators can search by title, author and journal, as well as see an overview of papers already approved or rejected from this page.

Figure 6: Approval dashboard

To approve or reject an article use the "choose action" drop down menu on the right and select approve or reject then click the green "Confirm" button
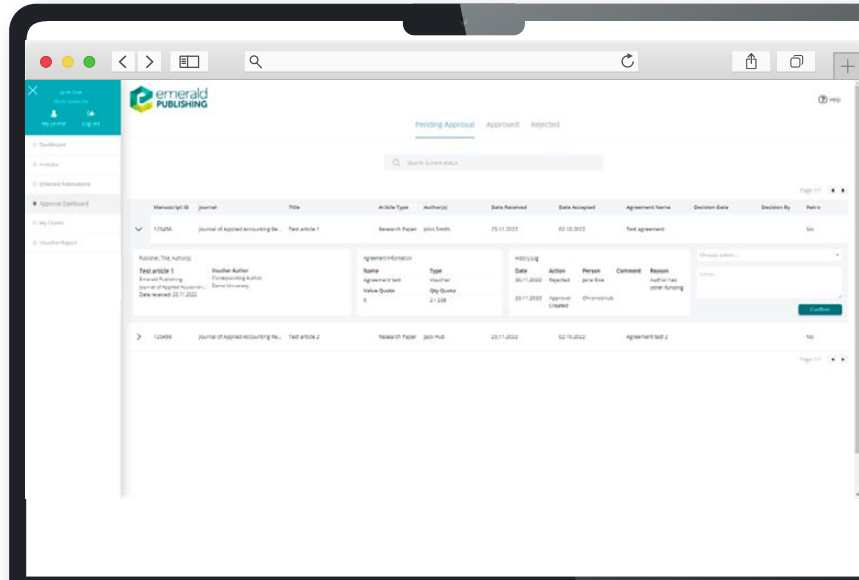

Figure 7: Approval dashboard

You can also search by title, author and journal, as well as see an overview of papers already approved or rejected from this page.
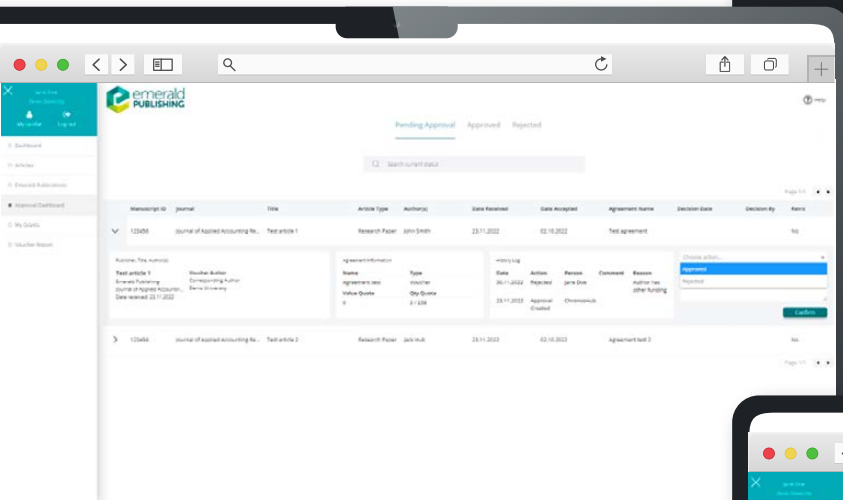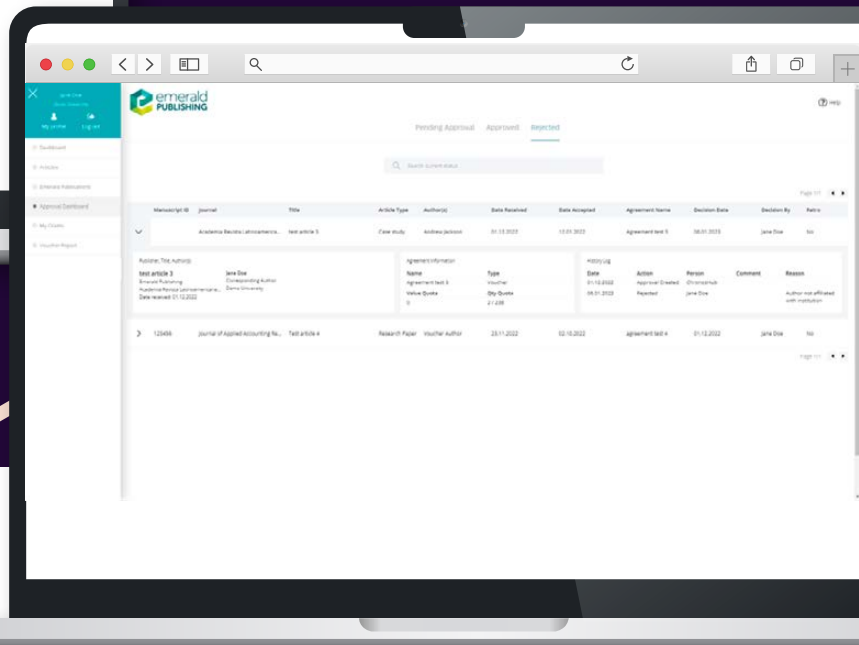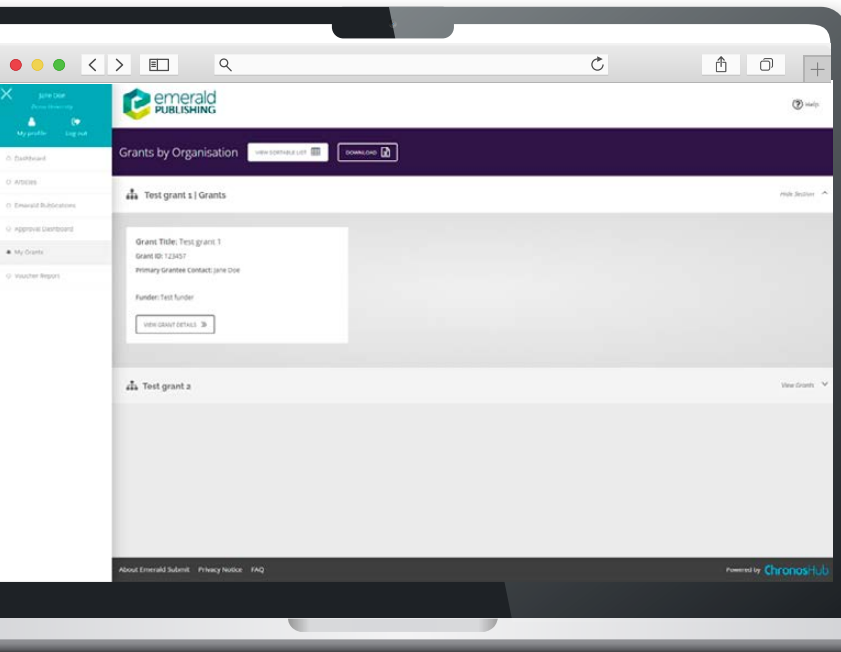
Figure 8: Approval dashboard - rejected articles

My Grants

On the grant page you can see an overview of all grants you have added to articles in ScholarOne. You can also click on a specific grant and see more detailed information.

Figure 9: My grants

Voucher reports

The voucher reports area of the dashboard allows you to see a high-level overview of the vouchers within our agreement and your voucher usage as well as the ability to drill down into the publishing activity within your institution/s.

Within the voucher reports, you can see a visual overview of the agreement appropriate to your level of access (e.g. institutional or consortia view). This includes details of the total vouchers in our agreement, vouchers remaining and vouchers used. In addition, it will tell you how many OA articles have been published, and how many vouchers have been accepted or rejected by authors.

Figure 10: Voucher report

You can click on the plus signs below the dashboard expand the agreement details and see this same information at a more granular level. For example if you are consortia, you can see details for each institution. At every level, you can export the data into excel.
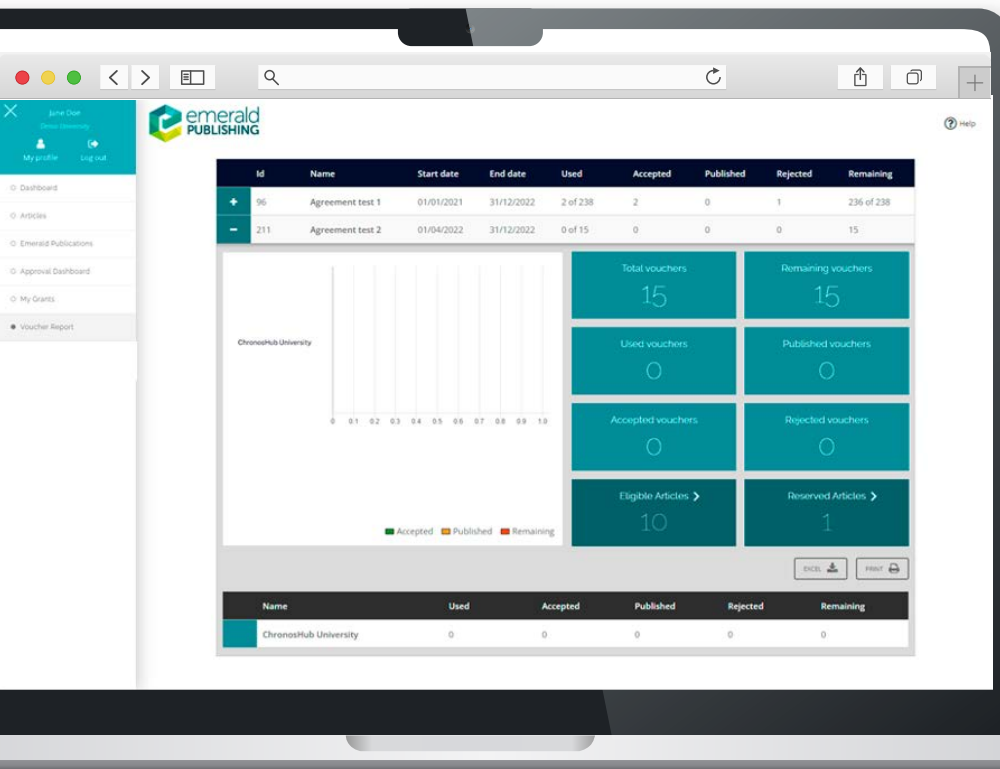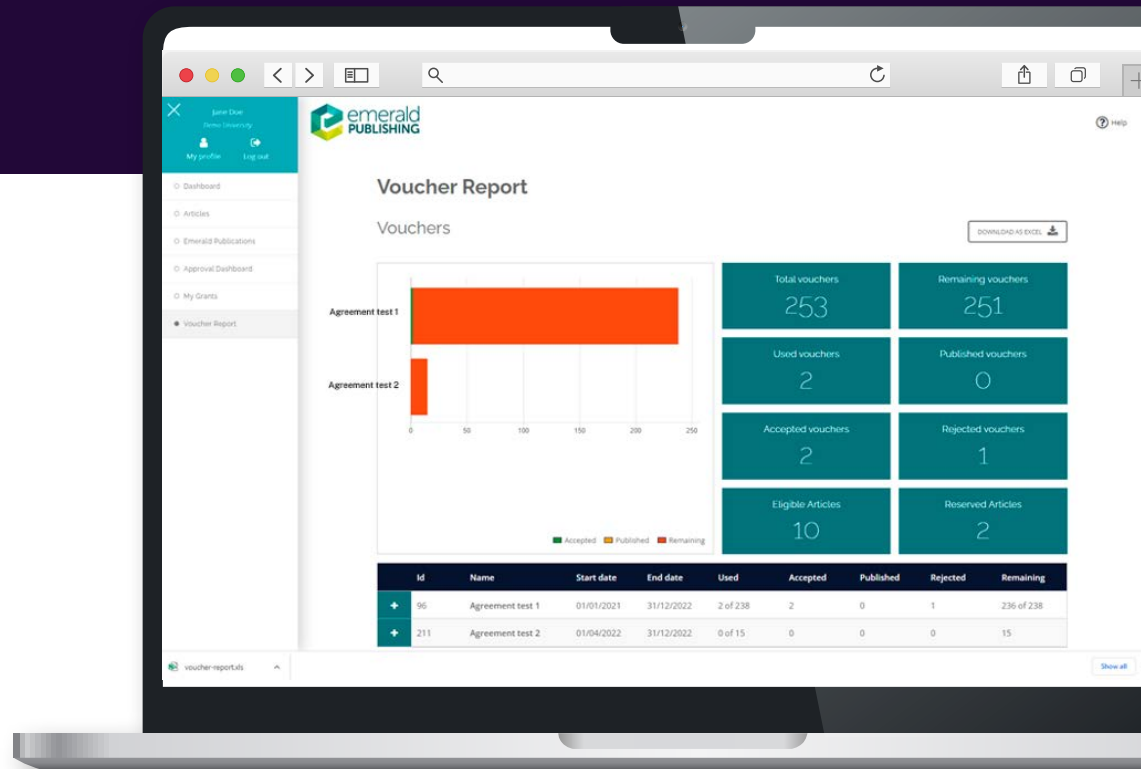
7
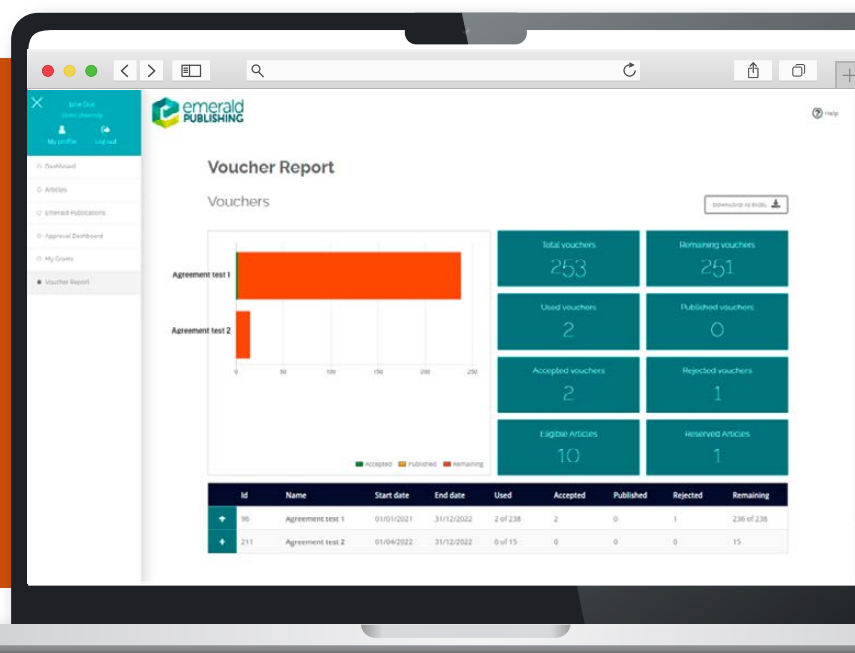
Figure 11: Voucher report – details

Figure 12: Voucher report – download

Retrospective OA

It is a much better author experience if we can sign our agreements before the start of the year, but if our agreement has been signed late in the year, then the system will automatically identify articles that have been paywalled during the term of the agreement. Institutions will be able to see these articles.
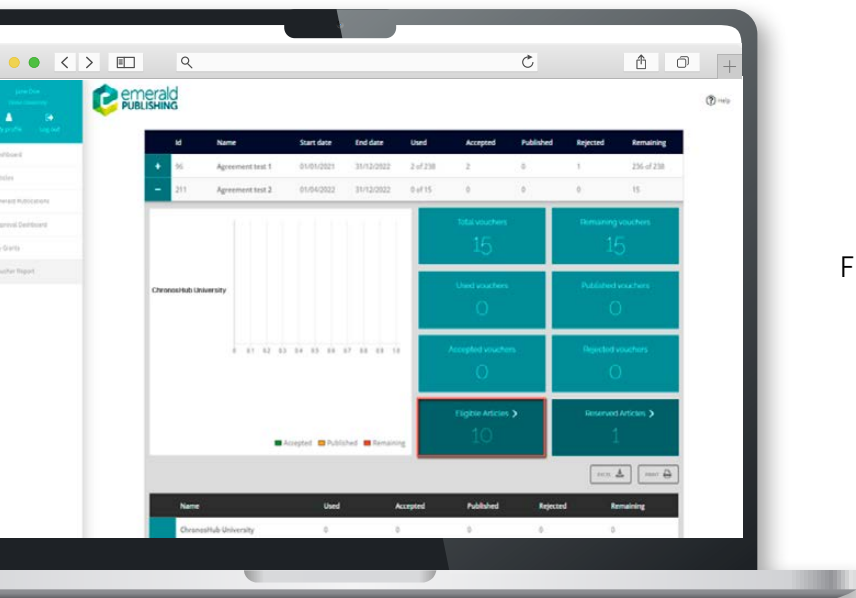

Figure 13: Retrospective OA- eligible articles

Find eligible articles for retrospective OA, you need to access the voucher report. In the example below you can see the two lower tiles called eligible articles and reserved articles for a quick overview in numbers. If you click on a specific agreement below like agreement test 1, the agreement expands, and you can see how many articles are eligible and reserved for that agreement.

If you click on the eligible articles button you can see an overview of all articles eligible for a voucher retrospectively. Here you can active the voucher by inviting the author to re-sign the license.

Figure 14: Retrospective OA – invite

Active invite means that the article has already been invited to use a voucher retrospectively - it is not clickable.

Invite means that the user can invite the authors to accept a voucher retrospectively. When the invite button is clicked it will create a voucher approval (voucher approval flow).
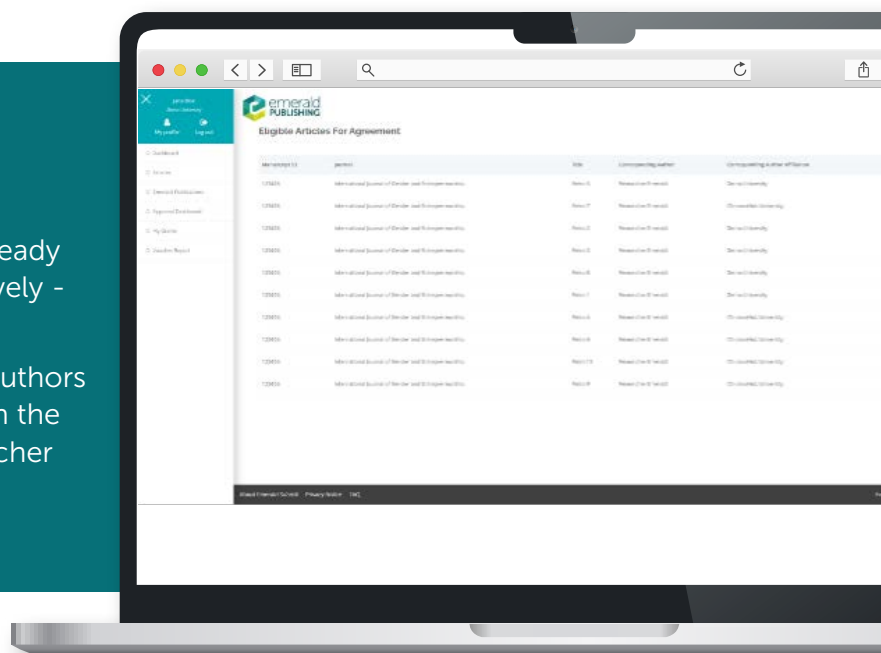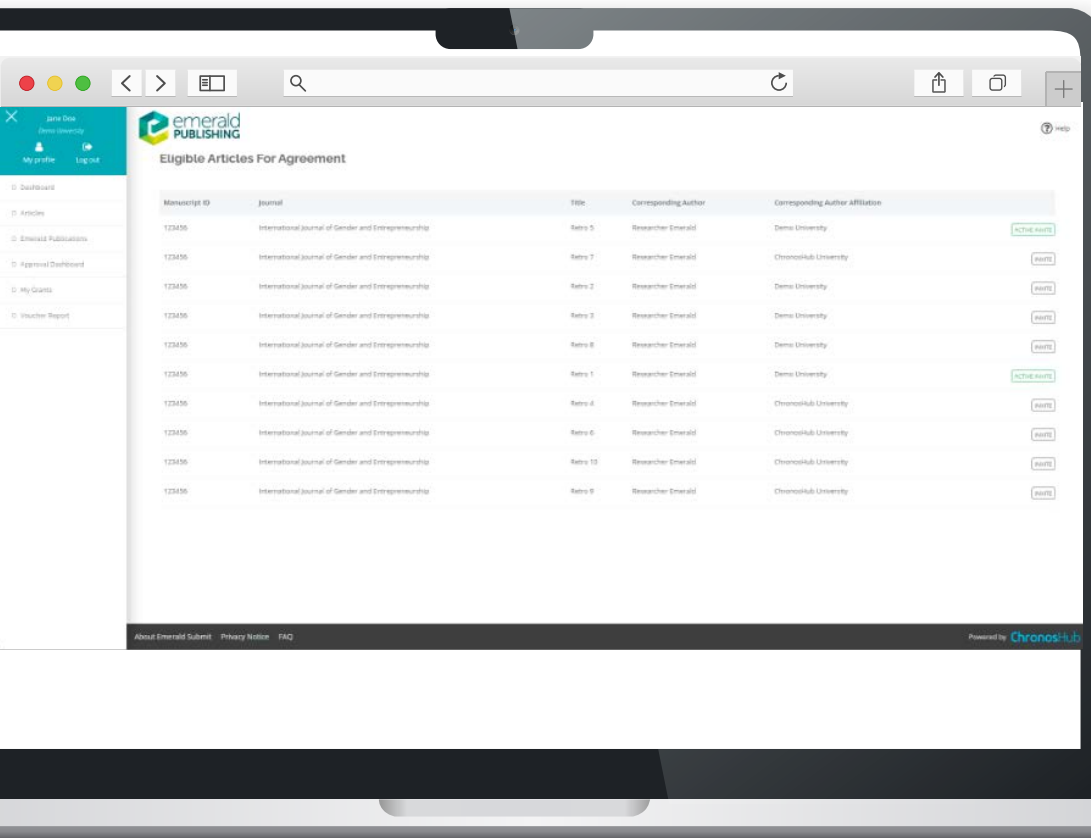
Figure 15: Retrospective OA - active invite

To confirm the use of a voucher by an author, an administrator of the agreement must go to the approval dashboard and approve the use of a voucher. Once approval is confirmed, a voucher for the agreement is reserved for that publication for 10 days and the corresponding author will be notified. They can then login to accept the voucher and sign their CC-BY license for their publication. If after 10 days, no action has been taken by the author, the voucher goes back to the pool and is no longer reserved. However, if there are vouchers left within the agreement when they do take action, one will be provided in keeping with our first come, first served policy.

FAQ

Q *"I have forgotten my log in details. Where can I find them?"*

A The username and password will be the same as the details that you use to log in to Emerald Insight profiles and admin portals. If you don't have a profile, please create one using the following guide. Email support@ emerald.com to confirm and we can then link your profile to your organisation to enable admin access. Alternatively use the forgotten password option during login.

Q *I have an Emerald profile, but cannot log in to the admin portal for Emerald Submit.*

A Emerald profiles must be linked with your organisation and be authorised as an administrator. Once you have registered for a profile please email Suport@Emerald.com to request that these are linked and that the correct permissions are included.

Q *I have an author who cannot log in.*

A All users must have an Emerald Insight profile to be able to log in to Emerald submit. Please ask the author to follow the guide on how to create a profile.

Q *A researcher at my organisation has questions about the user journey / how to use Emerald Submit to submit a paper.*

A Emerald offers an Author support site including short videos on how to navigate Emerald Submit. These can be found here.

Q *Would Emerald be able to offer training for authors on publishing and the submission process?*

A Please contact your local Emerald Sales rep. We can offer webinars and on-site training on a variety of topics, including getting published and the submission process. These are offered subject to availability.

Glossary

Term	Definition
Accepted for publication	An article that has been through the submission and peer review process and has been accepted. Vouchers for Gold Open Access publishing are allocated on acceptance of an article.
Approvals	Where applicable, if your organisation requires accepted papers to be approved before an Open Access voucher can be allocated, Submit allows administrators to approve or reject on each article.
Consortia View	This is the administration view for users from a consortia which displays information on all member organisations
Corresponding Author	Corresponding author is the author responsible for managing submissions of that article. An article is eligible for a voucher if the affiliation of the of the corresponding author is part of an agreement
Eligible Articles (OA)	Articles eligible for a Gold OA voucher after an agreement has been signed.
Emerald Submit	The system provided by ChronosHub and utilised by Emerald to administer open access, including our agreements with customers.
Institutional View	This is the administration view for users from a university or other independent organisation.
Invite	When an author of an article has been notified via email to use an open access voucher retrospectively
Journal Finder	A tool on the Submit system that enables authors and administrators to get further detail about a publication or journal.
OA	Open Access
Reserved voucher (Approval Dashboard & Retro OA Only)	Once confirmed, a voucher is reserved for 10 days and the corresponding author will be notified. If no action has been taken, the voucher is no longer reserved. Remaining vouchers will be provided when the author completes the process in keeping with our first come, first served policy.
Retrospective OA	The process used to convert paywalled content to open access if an article is published within the term of an agreement but before it has been signed.
Scholar One	The submission system that Emerald uses to manage the peer review process from submission to acceptance
Transformative Agreement	Sometimes called TAs or R&P, this is an agreement that includes read elements as well as publishing through the use of open access vouchers or similar moving publications towards a fully open access publishing model.
Pre-paid APC Voucher	Agreed as part of sales discussions, this allows an affiliated author to make their version of record open access when publishing in a journal without the need to pay the Article Processing Charge (APC) directly.

Who to contact if you need help

For all technical enquiries please contact **Support@Emerald.com**

For questions about your agreement please contact
your local sales rep or Sonja Pretis **spretis@Emerald.com**
for support in using the system.

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