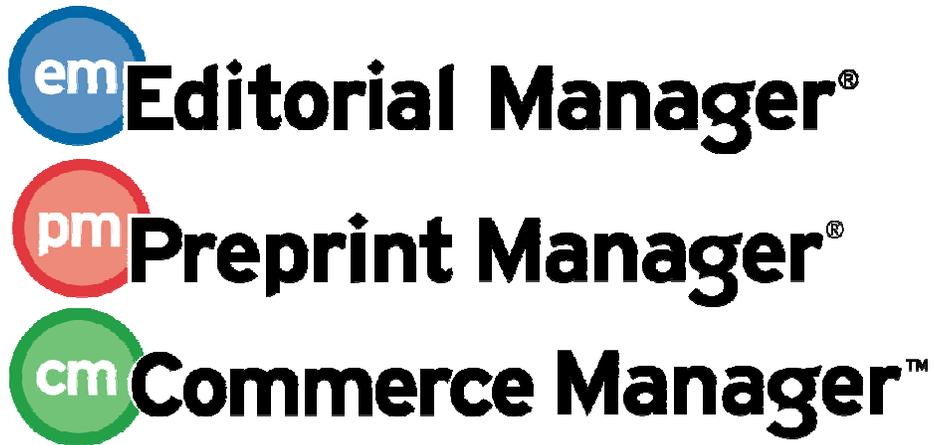


CONFIDENTIAL AND PROPRIETARY

Aries Systems Corporation



Release Notification Supplement

**Editorial Manager 8.0 Release Notification
Supplement 2
11/22/2010
Draft – Subject to Change**

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Editorial Manager/Preprint Manager 8.0 Release Notification Supplement 2

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Ratify Lower Level Editor Decision

Customers have requested a method of allowing a lower-level Editor to draft the actual Author Notification letter, but have the draft notification passed up the chain to a senior Editor to review, ratify and send if acceptable.

For example, a common workflow may be where the Editorial Office staff-person assigns a submission to an Editor (Editor A), and that Editor assigns the submission to a Second Level Editor (Editor B): EO→Editor A→Editor B.

In EM v7.3, the only way for Editor A to approve any ‘notification letter text’ written by Editor B is to have Editor B write any comments into the ‘Comments to Author’ box when submitting a decision. This field is automatically passed up the chain to Editor A when Editor B submits their decision. Editor A must then submit their own decision where they may choose to leave the field untouched, or add their own comments before notifying the Author. The Author Notification letter is configured to include the ‘Comments to Author’ field (via the %COMMENTS_TO_AUTHOR% merge field) and will include Editor B’s comments plus any additions or edits from Editor A. There may be times when all that is desired is for Editor A to approve the original Editor’s letter.

New in EM v8.0, this workflow is enhanced by allowing a lower level Editor to save a draft of a decision letter which is then passed up the decision chain. To pass a decision letter up the chain, an Editor reaches the *Notify Author* page and submits their decision by clicking the ‘Submit Decision without Notifying Author’ button, or the workflow can be automated using a new ‘Only draft the Notification (another Editor must ratify and send)’ permission (see the ‘Submit Draft Author Notification of Editor Decision’ section of these Release Notes for more information on this new permission).

When a lower-level Editor has submitted a draft decision for ratification, the next in-chain Editor is immediately taken to the Author Notification letter saved by the previous Editor upon clicking the [Submit Editor's Decision and Comments](#) action link. This Editor is then allowed to either send this decision without having to first submit their own comments, override and submit their own comments and record a different decision, or return the submission to the original Editor (effectively rescinding the decision).

NOTE: A Decision Letter can only be passed one level up the decision chain in this way. The publication may configure intermediate Editors to be [Skipped] on specific decisions, if they should not ratify these. The next Editor in the chain is then asked to Ratify the lower-level Editor’s saved decision.

In a workflow where a lower level Editor (Editor B) submits a decision with a draft Author Notification letter, then when the higher level Editor (Editor A) clicks the [Submit Editor's Decision and Comments](#) link he is brought to the *Notify Author* page, with the lower-level Editor’s draft Decision Letter displayed for Ratification. The Editor may then take the following actions:

- Ratify** the lower-level Editor’s draft letter by clicking the ‘Send Now’ button. Clicking this button sends the Author Notification letter on behalf of the higher-level, Ratifying Editor (Editor A in the chain above), and sets Editor A’s decision to the term submitted by the lower-level Editor (Editor B). Editor A is still counted as submitting a decision (which becomes the Final Decision), and that decision is automatically recorded as the decision passed up by Editor B.
 NOTE: The Editor may edit the decision letter before sending per existing functionality; these edits are a modification of the original Editor’s draft letter.
 NOTE: This option is only allowed where the Ratifying Editor is configured to Notify the Author on the lower-level Editor’s decision. If the Ratifying Editor does not have permission to Notify the Author in the selected decision, the Editor must submit their own decision.

Partial page display; ‘Send Now’ button will Ratify lower level Editor’s letter:

Notify Author

Manuscript Number:
BETSYTEST80-D-10-00022

Title: I'm curious about what is required 02-25-09

This is a Draft Author Notification saved by another Editor.

Using 'Save' or 'Save and Send Later' overwrites the draft saved by the original Editor.

To ratify and approve this decision, click 'Send Now' (if you have permission to Notify on this decision). Use this option if you agree with the Editor's decision and comments.

To reject this decision and send the assignment back to the previous Editor, use the Return to (Editor) link to allow the previous Editor to revise their decision, comments or Notification Letter.

Cancel Submit New Decision

Preview Letter Save Save and Send Later Send Now

Date Revision Due:	07/26/2011 <input type="text"/> (mm/dd/yyyy)
Editor Decision:	Major Revision
Rescind Decision:	Return to Associate Editor
From:	"The DEMO Journal" <bhopkins@ariessc.com>
To:	Kermit the Frog
Letter Purpose:	Editor Decision - Major Revise
Letter Subject:	Please Revise Your Submission
The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied by typing their e-mail addresses into the blank boxes next to cc:. Multiple e-mail addresses can be included, separated by semicolons (:).	
cc:	Editors Assigned to Manuscript
<input type="checkbox"/>	Edward Editor (Editor-in-Chief)
<input type="checkbox"/>	Emily Editor (Associate Editor)

Confirmation page displayed; any higher level Editor assignments are closed:

Notify Author Confirmation

The Author Notification Letter 'Your Submission' has been e-mailed to:

Kermit the Frog bhopkins@ariessc.com

[Return to Submissions with Required Reviews Complete](#)
[Return to All Submissions with Editor's Decision](#)
[Return to Main Menu](#)

- Submit his own Decision** and comments by clicking the new ‘Submit New Decision’ button. Clicking this button navigates the Editor to the first page of the existing ‘Submit Decision’ workflow. The letter previously saved by the lower-level Editor remains associated with that Editor’s assignment, but is not available for edit or delivery by the higher-level Editor.

NOTE: The Ratifying Editor will never see a ‘Modify Decision’ drop-down when Ratifying a lower-level Editor’s decision. If they wish to change the original Editor’s decision, they must go through the full Editor Decision workflow.

Partial page display; ‘Submit New Decision’ button will allow Editor to submit their own decision:

Notify Author

Manuscript Number:
BETSYTEST80-D-10-00022

Title: I'm curious about what is required 02-25-09

This is a Draft Author Notification saved by another Editor.

Using 'Save' or 'Save and Send Later' overwrites the draft saved by the original Editor.

To ratify and approve this decision, click 'Send Now' (if you have permission to Notify on this decision). Use this option if you agree with the Editor's decision and comments.

To reject this decision and send the assignment back to the previous Editor, use the Return to (Editor) link to allow the previous Editor to revise their decision, comments or Notification Letter.

Buttons: Cancel, **Submit New Decision**, Preview Letter, Save, Save and Send Later, Send Now

Date Revision Due: 07/26/2011 (mm/dd/yyyy)

Editor Decision: Major Revision

Rescind Decision: [Return to Associate Editor](#)

From: "The DEMO Journal" <bhopkins@ariessc.com>

To: [Kermit the Frog](#)

Letter Purpose: Editor Decision - Major Revise

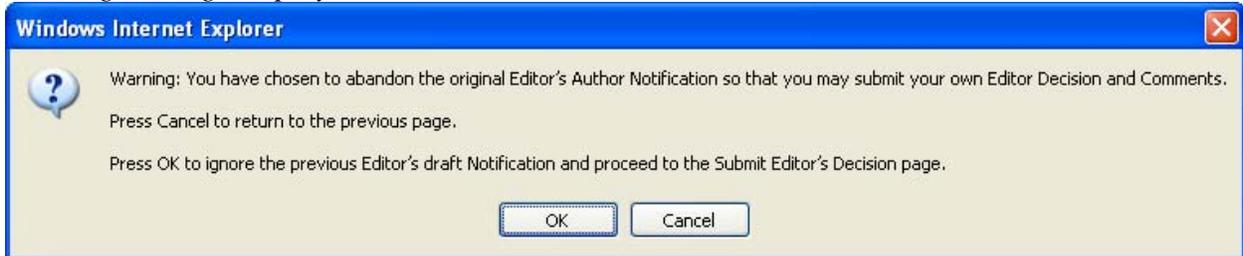
Letter Subject: Please Revise Your Submission

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied by typing their e-mail addresses into the blank boxes next to cc: Multiple e-mail addresses can be included, separated by semicolons (;).

cc: Editors Assigned to Manuscript

- [Edward Editor \(Editor-in-Chief\)](#)
- [Emily Editor \(Associate Editor\)](#)

Warning message displays to Editor:



- **Rescind** the lower-level Editor’s decision, using a new [Return to <Editor Role>](#) link found on the *Notify Author* page. Clicking this link brings the Editor to a new *Rescind Decision – Save Draft Letter* page, where the Editor may choose to save additional edits they have made to the letter before returning the submission to the lower-level Editor. From here, the Editor is taken to the first page of the existing Rescind Decision workflow. If configured, the Editor may modify any notifications triggered by this Rescind action.
NOTE: This link is always displayed in the ‘Ratify’ scenario. It is not dependant on the existing ‘Rescind Decision’ permission.

Partial page display; Return to <Editor Role> will allow Editor to rescind decision and send paper back to previous Editor:

Notify Author

Manuscript Number:
BETSYTEST80-D-10-00022

Title: I'm curious about what is required 02-25-09

This is a Draft Author Notification saved by another Editor.

Using 'Save' or 'Save and Send Later' overwrites the draft saved by the original Editor.

To ratify and approve this decision, click 'Send Now' (if you have permission to Notify on this decision). Use this option if you agree with the Editor's decision and comments.

To reject this decision and send the assignment back to the previous Editor, use the Return to (Editor) link to allow the previous Editor to revise their decision, comments or Notification Letter.

Cancel Submit New Decision

Preview Letter Save Save and Send Later Send Now

Date Revision Due: (mm/dd/yyyy)

Editor Decision: Major Revision

Rescind Decision: [Return to Associate Editor](#)

From: "The DEMO Journal" <bhopkins@ariessc.com>

To: [Kermit the Frog](#)

Letter Purpose: Editor Decision - Major Revise

Letter Subject:

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied by typing their e-mail addresses into the blank boxes next to cc:. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: Editors Assigned to Manuscript

[Edward Editor \(Editor-in-Chief\)](#)

[Emily Editor \(Associate Editor\)](#)

Editor is prompted to save edits to the draft letter, or rescind without updating:

Rescind Decision - Save Draft Letter

Do you want to update the draft Notification?

You have chosen to re-open the original Editor's assignment, rescinding their decision so that they may revise their original decision, comments or Notification letter.

You can save any changes you have made to their original draft letter, before returning the submission to them with this updated draft.

Cancel Save Draft Letter and Rescind Rescind without Updating Draft

- The Editor may also cancel out and take no action; subsequently clicking the Submit Editor's Decision and Comments link will return the Editor to this Ratify page.

NOTE: Ratifications are passed up the chain, to the next Editor 'in line' to become the Handling Editor (the system will still 'skip' any Editors configured to be skipped for the decision submitted by the lower-level Editor). If a higher-level Editor than the Handling Editor clicks on their Submit Editors Decision and Comments action link, then the *Terminate Outstanding Assignments and Proceed* page displays per current functionality. In this scenario, the Editor is not asked to ratify the lower-level Editor's decision, but rather is expected to submit their own decision.

TO CONFIGURE:

No additional configuration is required to use this new feature. To fully utilize the existing Rescind Decision workflow, make sure there are 'Rescind Decision' notifications configured to be sent to the lower-level Editor on returning the submission to them.

Submit Draft Author Notification of Editor Decision

EM v8.0 introduced the ability for Editors to notify Authors specifically after making a decision, and to further limit that permission to a sub-set of decision terms.

New in EM v8.0, the 'Notify Author After making a Decision' permission has a new sub-permission called 'Only draft the Notification (another Editor must ratify and send)'. This sub-permission allows an Editor to reach the *Notify Author* page so that they can edit the text of the decision letter to the Author but not send it. All letters must be passed up to the next Editor for Ratification (see the 'Ratify Lower Level Editor Decision' section of these Release Notes for more information).

When an Editor with this new permission enabled submits a Decision on which they have 'Notify Author' permission, the 'Send Now' button is disabled on the *Notify Author* page, and a new 'Submit Decision with Draft Letter' button displays in place of the 'Submit Decision Without Notifying Author' button. The Editor is still able to save their letter to be worked on at a later time, or they must submit their decision with a draft of the letter. That draft is passed up the chain to be ratified by a higher level Editor (see the 'Ratify Lower Level Editor Decision' section of these release notes).

Partial page display; Notify Author with new 'Only draft...' permission:

Notify Author

Manuscript Number: 23-10-Testing-202

Title: "Test Reassigning SG - two"

To complete your decision, you must use 'Submit Decision with Draft Letter'.

'Cancel' returns you to your original decision; if you then make changes to your Comments to Author, you must choose between keeping this edited letter and generating a new letter from your revised decision and comments when you return to this page.

Buttons: Cancel, **Submit Decision with Draft Letter**, Preview Letter, Save, Save and Send Later, **Send Now**

Editor Decision: Accept as is

Modify Decision: Accept as is

From: "The Journal of X, Y and Z" <smacrae@kfinder.com>

To: Anne Author

Letter Purpose: Editor Decision - Accept

Letter Subject: Your Submission

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied by typing their e-mail addresses into the blank boxes next to cc:. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: Editors Assigned to Manuscript

Arnold Editor (Editor in Chief)

cc: []

Line Wrap: soft

Letter Body: [Insert Special Character](#) [Open in New Window](#)

Ref.: Ms. No. 23-10-Testing-202
Test Reassigning SG - two
Journal of X, Y and Z
Dear %TITLE% %LAST_NAME%,

When the Editor clicks the 'Submit Decision with Draft Letter' button, the draft of the letter is saved automatically, and the Editor's assignment is closed. The Editor will see the existing confirmation page.

Submit Editor's Decision	Thank you for submitting a Decision on Manuscript Number 23-10-Testing-203. E-mail has been sent to the appropriate parties.
	Return to New Editor Assignments
	Return to Editorial Menu

The assignment then goes to the next higher level, non-‘Skipped’ Editor (current functionality). When the higher-level Editor clicks the Submit Editor’s Decision and Comments link, they will first be asked to Ratify the lower-level Editor’s decision. If there are no more Editors in the chain, an Editor with the ‘Notify Author when Editor Chain is Complete’ permission can click the Notify Author action link to view and send the saved draft Notification Letter (see the ‘Ratify Lower Level Editor Decision’ section of these release notes for more information).

NOTE: Editors without the ‘Only draft the notification (another Editor must ratify and Send)’ permission enabled can still choose to save a draft of the Author Notification letter by clicking the ‘Submit Decision without Notifying Author’ button, thus triggering the Ratification workflow.

TO CONFIGURE:

In RoleManager, select the Editor roles that should only be able to draft an Author Notification letter when submitting a decision. Check/Select the new ‘Only draft the Notification (another Editor must ratify and send)’ permission.

NOTE: This is a sub-permission of the ‘Notify Author after making a Decision’ permission and applies to any decision on which this Editor may Notify the Author.

This new permission is disabled on upgrade.

Partial page display; new permission is not enabled on upgrade:

Reviewer Invitations

Editor Decisions

Make a Decision

Terminate Outstanding Reviewer and Editor Assignments when Making a Decision

Skipped in Decision Chain if previous Editor's Decision IS

Skipped in Decision Chain if previous Editor's Decision IS NOT

Notify Author after making a Decision

Only draft the Notification (another Editor must ratify and send)

Notify after any Decision

Only Notify after a Decision of:

Modify Editor Manuscript Rating Answers During Decision Process

Edit Editor Comments and Ratings After Decision

Notify Author of Editor's Decision when Editor Chain is Complete

Minor Revision
Reject
Major Revision
Accept

Minor Revision
Reject
Major Revision
Accept

Minor Revision
Reject
Major Revision
Accept

‘Notify Author’ Page Enhancements

EM v8.0 introduced the ‘Notify Author after making a Decision’ permission and associated ‘Notify after any Decision’/‘Only Notify after a Decision of’ sub-permission, allowing publications to control precisely which decisions would trigger the Author Notification for Editors.

Also in EM v8.0, the previous ‘Notify Author’ permission was renamed ‘Notify Author of Editor's Decision when Editor Chain is Complete’ which controls only whether an Editor role (for example, the Editorial Office) may notify an Author of a decision after all Editor assignments are closed. When an Editor with this permission clicks the [Notify Author](#) link, the *Notify Author* page displays, with either a previously saved draft (if available), or the default letter for the selected Decision.

Also introduced in EM v8.0, a ‘Submit Decision without Notifying Author’ button allows the Editor to explicitly save the decision and cancel the Author notification, completing their assignment and moving the submission up the chain. In the event the final Editor in the chain had made changes to the Author letter but wished to have the Editorial Office send the notification, the Editor was required to click the ‘Save’ button before the ‘Submit Decision without Notifying Author’ button to save their changes.

The following additional enhancements are made to the *Notify Author* page in EM v8.0:

If an Editor is configured with the new ‘Only draft the Notification (another Editor must ratify and send)’ permission, after submitting a decision, the ‘Send Now’ button is disabled and the ‘Submit Decision without Notifying Author’ button is replaced by a ‘Submit Decision with Draft Letter’ button (discussed in the ‘Submit Draft Author Notification of Editor Decision’ section of these Release Notes).

Contextual instructional text now displays on the left-side of the page. This consists of two parts:

1. A warning displayed when a Saved Draft Letter has been loaded that tells the Editor whether they are working on a letter that they saved, or a letter saved by another Editor.
2. Guidance text, which is context specific.

Notify Author

Manuscript Number:
BETSYTEST80-D-10-00019

Title: test a

This is a Draft Author Notification saved by another Editor.

Using 'Save' or 'Save and Send Later' overwrites the draft saved by the original Editor.

To notify the author of the Editor's decision, click 'Send Now'

If displayed, use the 'Modify Decision' drop-down to change the Editor's recorded decision.

If displayed, use the Return to (Editor) link to rescind the original Editor's decision and return the submission to them.

[Cancel](#) [Submit Decision without Notifying Author](#)

[Preview Letter](#) [Save](#) [Save and Send Later](#) [Send Now](#)

Date Revision Due:	<input type="text" value="02/09/2011"/> <small>(mm/dd/yyyy)</small>
Editor Decision:	Major Revision
Modify Decision:	<input type="text" value="Major Revision"/>
Rescind Decision:	Return to Associate Editor
From:	"The DEMO Journal" <bhopkins@ariessc.com>
To:	Mary Francois Smith
Letter Purpose:	Editor Decision - Major Revise
Letter Subject:	<input type="text" value="Please Edit and Resend"/>

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied by typing their e-mail addresses into the blank boxes next to cc. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: Editors Assigned to Manuscript

<input type="checkbox"/>	Emily Editor (Associate Editor)
<input type="checkbox"/>	Annie The Doq (Associate Editor)

Additionally, when an Editor uses the Notify Author action link when the editor chain is complete and that Editor has the existing 'Rescind Decision' permission, then the *Notify Author* page displays a new Return to <Editor Role> link, where the <Editor Role> is the role of the Editor who made the final decision on the submission. This link behaves as the existing Rescind Decision action link available in some folders. This allows an editorial administrator, for example, to return a submission to the Editor who made the decision to rework, as an alternative to using the Modify Decision drop-down to change it for them.

NOTE: This applies to notification after the editor chain is complete. When an Editor is asked to Ratify a lower-level editor's decision, the Return to <Editor Role> link is always displayed, even if the ratifying Editor does not have the Rescind Decision permission (allowing them to always return the submission back to the original Editor). When an Editor reaches the *Notify Author* page after submitting a decision, the Return to <Editor Role> link is never displayed (as their own assignment is still active at this point).

Partial page display; link to rescind decision from Notify Author page:

The screenshot shows a web interface for a 'Notify Author' page. At the top, there are five buttons: 'Cancel', 'Submit Decision without Notifying Author', 'Preview Letter', 'Save', 'Save and Send Later', and 'Send Now'. Below the buttons is a form with several fields:

Date Revision Due:	02/09/2011	(mm/dd/yyyy)
Editor Decision:	Major Revision	
Modify Decision:	Major Revision	
Rescind Decision:	Return to Associate Editor	
From:	"The DEMO Journal" <bhopkins@ariessc.com>	

Currently in EM v8.0, it is possible for the Editor at the top of the chain to save a draft letter for another Editor (e.g. the Editorial Office), to send, however the Editor must remember to click the 'Save' button before clicking the 'Submit Decision without Notifying Author' button. This explicit 'Save' is no longer required, as clicking the 'Submit Decision without Notifying Author' button now brings the Editor to a new *Submit Decision – Save Draft Letter* page.

This page asks the Editor to choose whether to abandon their saved Decision Letter, or to save a draft version to pass up to the next Editor in the chain. This choice is now valid at any point in the decision chain: for lower-level Editors, it will trigger a Ratification by the next Editor up the chain; for Editors at the top of the chain, it is a method of passing the decision letter for another Editor, e.g. the Editorial Office, to Notify the Author.

There are three buttons on this page:

- **Cancel** - Returns the Editor to the *Notify Author* page
- **Submit Draft with Decision** - Saves the content of the Notify Author page, and closes the Editor's Assignment. This is the equivalent of clicking 'Save' then 'Submit Decision without Notifying Author' under previous v8.0 functionality. This Editor's Author Notification letter will display to the next higher Editor on clicking the Submit Editor's Decision and Comments action link (for Ratification by that Editor) or the Notify Author action link.
- **Submit Decision Only** - Deletes any saved Author Notification letter linked to the current Editor's assignment, and closes the Editor's assignment.

NOTE: On upgrade, this page will apply to all existing Editors with the 'Notify Author after Making a Decision' permission, who decide not to send the notification on this page.

Submit Decision - Save Draft Letter

Do you want to save your notification letter?

You have chosen to complete your assignment without sending a Notification Letter to the Author at this point.

Do you want to save the current Author Notification letter as a draft for the next Editor or to submit the decision alone, discarding this draft Notification letter?

TO CONFIGURE:

No new configuration is required for the Rescind Decision: Return to <Editor Role> link. Editor roles with the existing ‘Rescind Decision’ and ‘Notify Author of Editor's Decision when Editor Chain is Complete’ permissions enabled will now see the Return to <Editor Role> link on the *Notify Author* page after clicking a ‘Notify Author’ link.

To accommodate a workflow in which a particular Editor Role should always send their draft letter up the chain for either Ratification or for another Editor to send, then enable the new ‘Only draft the Notification (another Editor must ratify and send)’ permission for that Role. See the ‘Submit Draft Author Notification of Editor Decision’ section of these Release Notes for more information.