Aries Systems Corporation

Editorial Manager®

Preprint Manager™

Release Notification

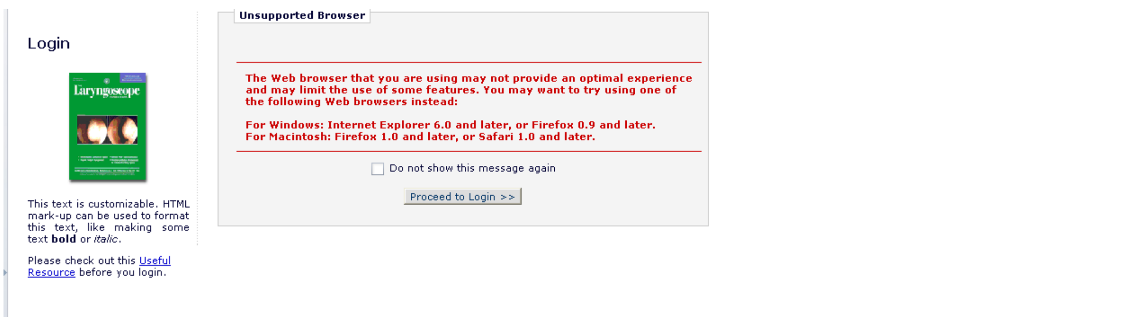
Editorial Manager/Preprint Manager
6.0 Release Notification

Subject to Change

Editorial Manager/Preprint Manager 6.0 Release Description

Unsupported Browser Message

When Editorial Manager and Preprint Manager are enhanced with new features and functions, the changes are designed for and tested on a subset of supported web browsers. Using an unsupported browser may result in a feature not working as designed or an unintended display of the page. For this reason, the system is enhanced with a new pop-up alert box to be displayed if the user is accessing the login page with an unsupported browser. The message informs the user that they would have a better experience if they switched to a supported browser (a list of supported browsers is provided). The alert box also offers the user the choice to not see the message again.



Any browser versions *earlier* than those listed below is considered to be unsupported.

Windows:
Internet Explorer 6.0
Firefox 0.9

Macintosh: OS X
Firefox 1.0
Safari 1.0

NOTE: Opera is not a supported browser.

NOTE: The user preference for message suppression (checking ‘Do not show this message again’) is stored by means of a persistent cookie. Therefore, the user may be exposed to the message again if they switch to a different browser and/or computer (e.g. even if they have indicated they don’t want to see the message, they may see it again when using their home computer vs. their office computer).

TO CONFIGURE: No configuration is necessary.

Increased Password Security

TBD whether this section to be included in Release Notes.

Some publishers would like stricter policies for system passwords, in order to increase security. To achieve this objective, the system supports Password Policy Profiles ("profiles"). A profile consists of a group of password security settings that can be saved by a Publisher, allowing policy changes to be made across all of its journals. Profiles are maintained by the Customer Service group outside of the Editorial Manager system. To implement a password policy for your journal(s), contact Aries Customer Service.

Generally, password policies are determined by the publishing organization, and the same password policy would be implemented for all of the publisher's titles. If a particular publication prefers a different policy (either more stringent or more lax), the system can accommodate the exception without impacting other journals.

Upon release of version 6.0, publishers are able to implement a password policy for their journals. Note, this can be done before the individual sites migrate to 6.0, or at any time after the sites are upgraded. We recommend that the policy be coordinated with Aries Customer Service *before* the individual sites are upgraded, so that the user interface changes related to password rules coincide with all the other enhancements included in the release. It is also recommended that publishers carefully consider the password policy before rolling it out, as repeated changes in password expectations could result in confusion and frustration for users.

NOTE: Publications that are part of an IJRS (Inter-Journal Resource Sharing) group must all have the same password profile, and all password-related information will be synchronized across all journals in the group.

The Password Profile allows configuration of the following parameters:

- Minimum number of characters.
- Password cannot be the same as the username.
- Password cannot be the same as the user's first or last name.
- Password must be alpha-numeric (i.e. must contain both letters and numbers).
- Passwords must be mixed case (i.e. must contain both upper and lower case letters).
- User must change password the first time he logs into the system (following new registration, proxy registration, or a password reset).
- Password cannot be the same as any of the last X passwords used by this user.
- Password cannot be used by the same account in at least the last Y months.
- User account will be locked (i.e. user cannot login) after X number of failed login attempts in Y minutes. The password is rendered unusable until Y minutes have elapsed, at which time the password is automatically released. The purpose of locking an account in this fashion is to prevent attacks using dictionary or other methods by making the timeframes unrealistic. This is recommended by all security consultants as an extremely important security parameter. There is also a manual password release function in at the Hosting Administrator level, which

allows Customer Service to release locked accounts before Y minutes have elapsed.

- Passwords expire after Y days.

Profile parameters are applied independently to each user role in the system. The following hierarchy determines the definition of ‘highest role’ a user can have:

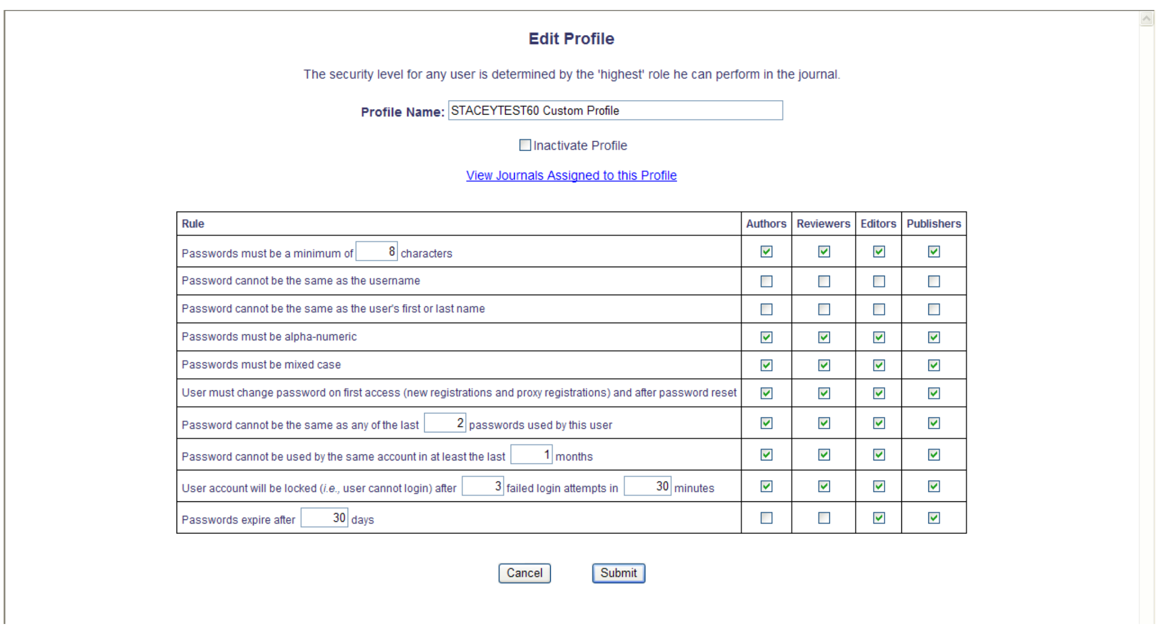
1. Editor (highest)
2. Publisher
3. Reviewer
4. Author (lowest)

For example, assume the password profile for a journal has very relaxed rules for Authors and Reviewers, but more stringent rules for Editors. If Ed Editor logs into the system using his Author Role, he is forced to abide by the *Editor’s* password rules.

A journal can have one, some, all, or none of the password rules applied. In the sample profile below, the rules generally apply to all user roles (except for ‘Password cannot be the same as the username’ and ‘Password cannot be the same as the user's first or last name’, which are not activated for this particular profile). However, passwords for Editor and Publisher Roles expire after 30 days.

NOTE: This page is accessible by Aries Customer Service only, but helps to illustrate how the rules are applied. When a publisher wishes to implement a password policy, this should be used as a guideline for specifying the rules.

NOTE: The configuration shown below is a SAMPLE and does not reflect the password rules for an actual journal.



Edit Profile

The security level for any user is determined by the 'highest' role he can perform in the journal.

Profile Name: STACEYTEST60 Custom Profile

☐ Inactivate Profile

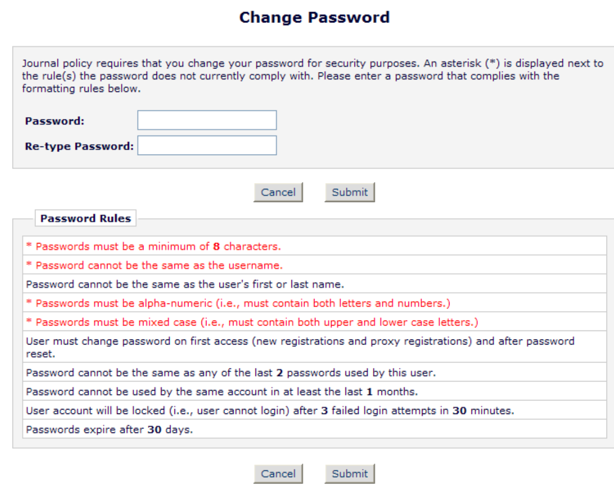
View Journals Assigned to this Profile

Rule	Authors	Reviewers	Editors	Publishers
Passwords must be a minimum of 8 characters	☑	☑	☑	☑
Password cannot be the same as the username	☐	☐	☐	☐
Password cannot be the same as the user's first or last name	☐	☐	☐	☐
Passwords must be alpha-numeric	☑	☑	☑	☑
Passwords must be mixed case	☑	☑	☑	☑
User must change password on first access (new registrations and proxy registrations) and after password reset	☑	☑	☑	☑
Password cannot be the same as any of the last 2 passwords used by this user	☑	☑	☑	☑
Password cannot be used by the same account in at least the last 1 months	☑	☑	☑	☑
User account will be locked (*i.e.*, user cannot login) after 3 failed login attempts in 30 minutes	☑	☑	☑	☑
Passwords expire after 30 days	☐	☐	☑	☑

Cancel Submit

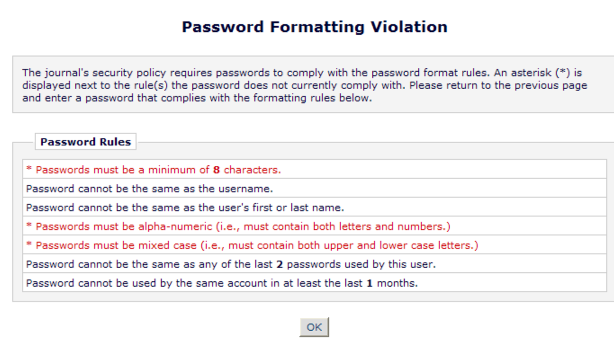
Once a profile is applied to a journal, all users with non-conforming passwords are forced to change their password at login. Therefore, once the initial profile is created and applied to all journals, many users may have passwords that do not comply with one or more of the journal's password standards. Publishers are encouraged to communicate the new requirements clearly to journals before the new password policies are rolled out, to minimize the number of customer service queries.

A user logging in with a non-conforming password is taken immediately to the *Change Password* page. All available password rules in effect for the journal are listed, and any that are in violation are displayed in red text. This provides the user with an overview of the password rules in effect, and makes it clear which rules are currently non-compliant.



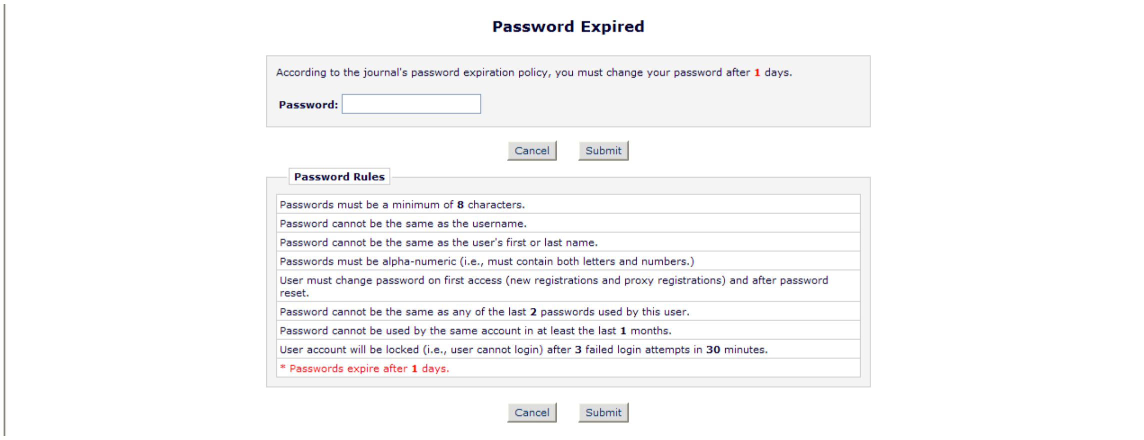
NOTE: The Re-type Password box is only displayed if the site is using password encryption (this is a policy set at the publisher level and is designated outside of the system).

The user is prompted to enter (and re-enter) a new Password, and click the 'Submit' button. If the password conforms to the password policy, the user is logged into the system. If the password still does not conform to the journal's password formatting requirements, the following page is displayed.



If a user tries to login but his password has expired, the following page is displayed.

NOTE: If the publication does not have a password expiration policy in place, users will never see this page.


Password Expired

According to the journal's password expiration policy, you must change your password after 1 days.

Password:

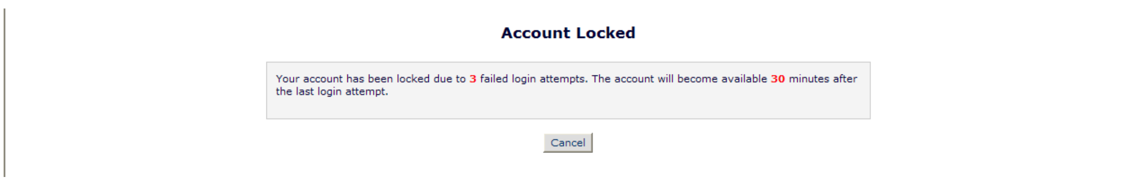
Cancel Submit

Password Rules

Passwords must be a minimum of **8** characters.
Password cannot be the same as the username.
Password cannot be the same as the user's first or last name.
Passwords must be alpha-numeric (i.e., must contain both letters and numbers.)
User must change password on first access (new registrations and proxy registrations) and after password reset.
Password cannot be the same as any of the last **2** passwords used by this user.
Password cannot be used by the same account in at least the last **1** months.
User account will be locked (i.e., user cannot login) after **3** failed login attempts in **30** minutes.
* Passwords expire after **1** days.

Cancel Submit

If a user tries to login but his account is locked, the following page is displayed:


Account Locked

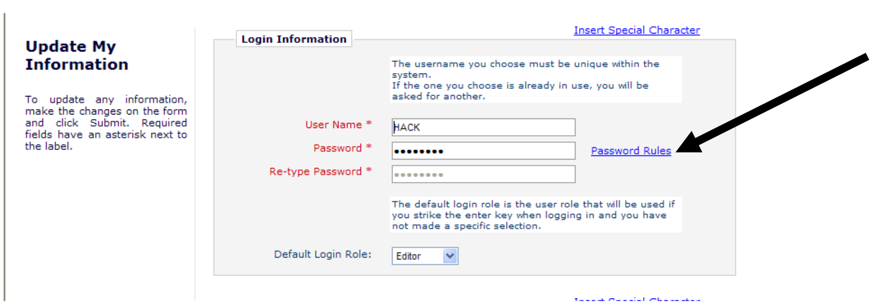
Your account has been locked due to 3 failed login attempts. The account will become available 30 minutes after the last login attempt.

Cancel

NOTE: If the publication does not have a locked account policy in place, users will never see this page.

NOTE: In the unlikely event a user's account gets locked and they require immediate system access (i.e. sooner than the automatic account release after X minutes), the Editorial Office can contact Customer Service to have the account manually released.

Users are also expected to conform to the password policy when updating their personal information. The *Update My Information* page displays a new Password Rules link.


Update My Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

Insert Special Character

Login Information

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

User Name * HACK

Password * •••••••• Password Rules

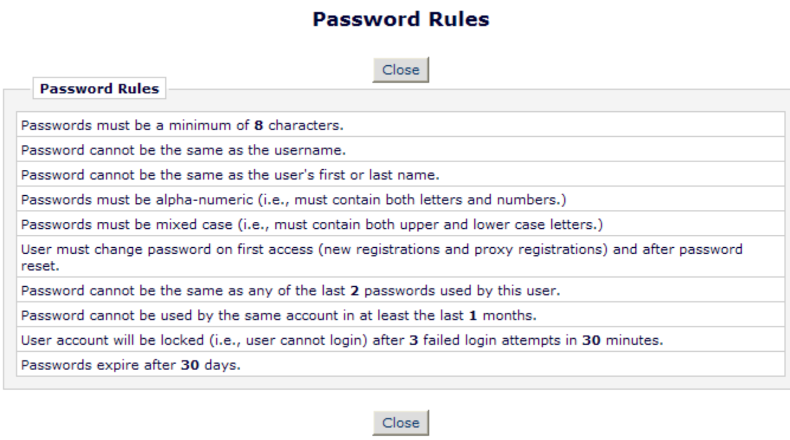
Re-type Password * ••••••••

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

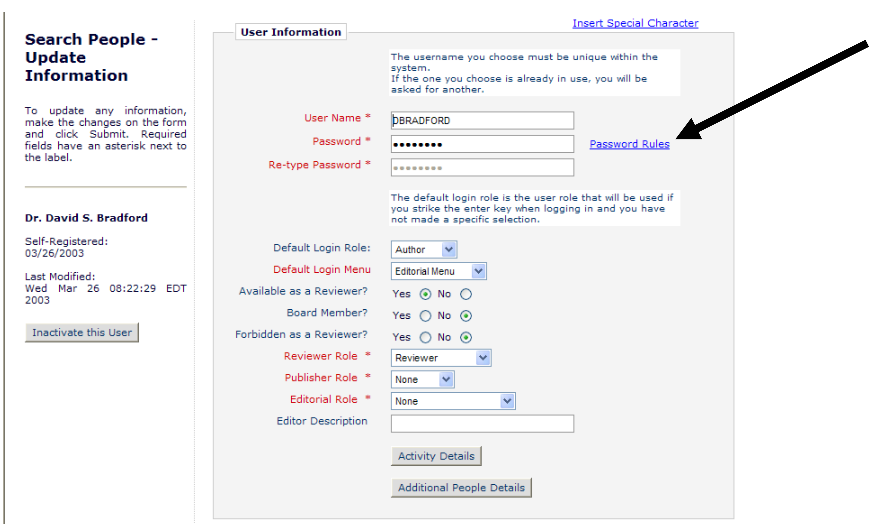
Default Login Role: Editor

Clicking the Password Rules link opens a pop-up window showing the complete set of applicable password rules.

NOTE: The screenshot below lists all possible rules. If a particular journal only has one rule in effect (e.g. Password must be alpha-numeric), that single rule would be displayed on the *Password Rules* page.



The Password Rules link is also displayed on the *Search People – Update Information* page. If an Administrator changes another user's password on this page, then the user is forced to change his password the next time he attempts to login to the system.

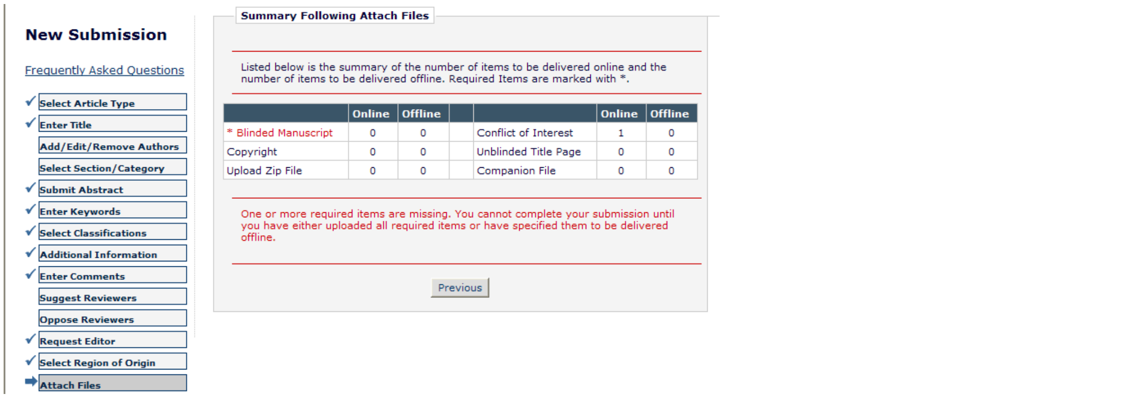


NOTE: Password rules are not displayed at user registration, because when a person self-registers, the system automatically assigns a password (i.e. the user does not get to choose his password until after he logs in for the first time).

TO CONFIGURE: Contact Customer Service.

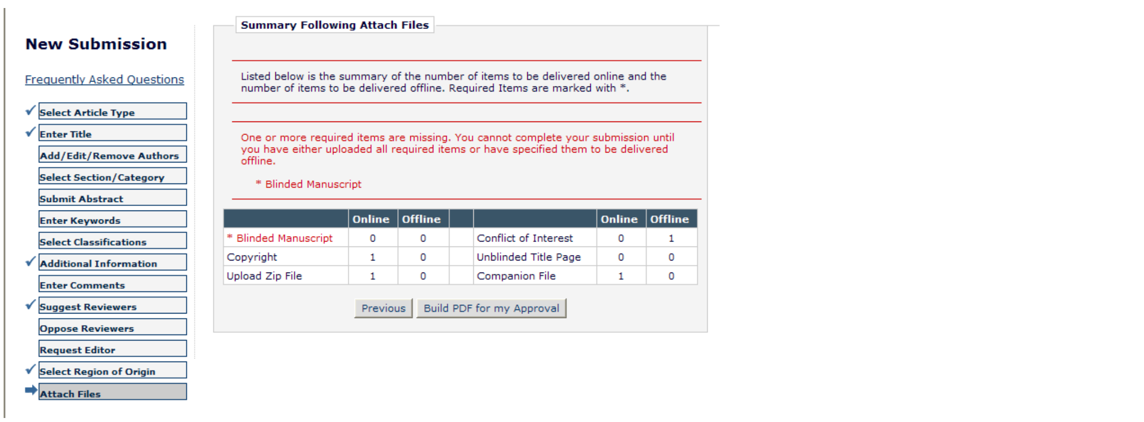
List Required Submissions Items in Pop Up Alert

In EM Version 5.0, when an Author attempts to complete a submission without including all the required Submission Items, he must look at the Submission Items grid above the message (on the *Summary Following Attach Files* page) to determine which Submission Items are required and have not been submitted.



Although the missing items are shown in red and are listed in the order they appear on the *Edit Article Type* page, it was felt that the missing item information should be displayed more prominently for Authors.

In version 6.0, the list of the missing items is added to the message itself, and is relocated to the top of the page, before the grid containing the Submission Items.



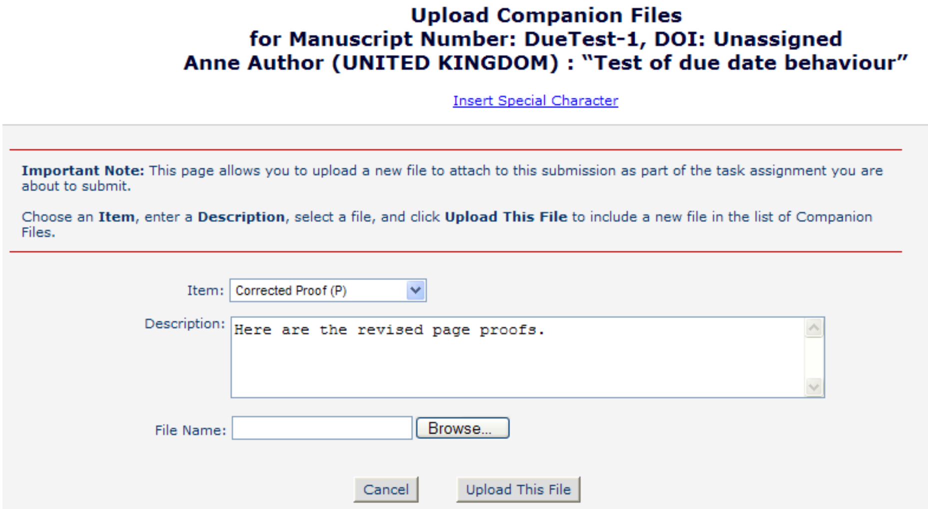
TO CONFIGURE: No configuration is necessary.

Replacing Companion Files

Companion files can be uploaded by users on the *Submit Production Task* (production tracking users only) and *File Inventory* (all EM/PM users) pages. In version 6.0, a new option has been added that allows a companion file originally uploaded as part of a task to be replaced by a new file. When a ‘replacement’ companion file is uploaded in place of the original, the ‘original’ companion file is automatically hidden. Administrators can enable this new feature when configuring production tasks in PolicyManager. For non-production tracking users, no configuration is required for the automatic replacement of companion files on the *File Inventory* page.

If this option is enabled, the *Submit Production Task* page displays a Replace link for each companion file listed.

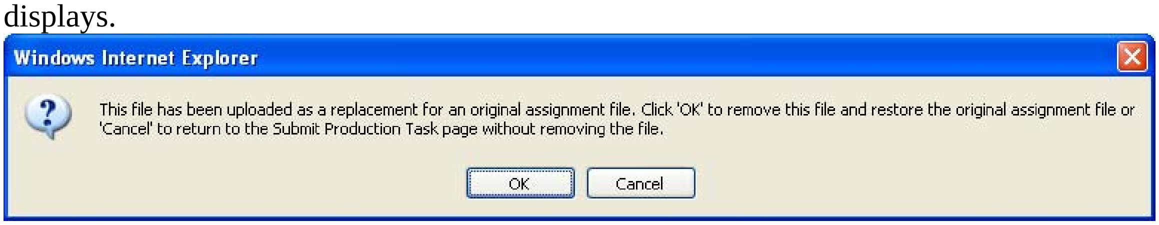
Clicking the Replace link navigates the user to the *Upload Companion Files* page.



When the replacement companion file has been uploaded, it is displayed under the 'Newly Uploaded Files' heading on the *Submit Production Task* page. The original companion file that was replaced is not hidden until the task submission is completed, and is displayed under the 'Original Assignment Files' heading with the text 'Replaced' displayed in the Item column.

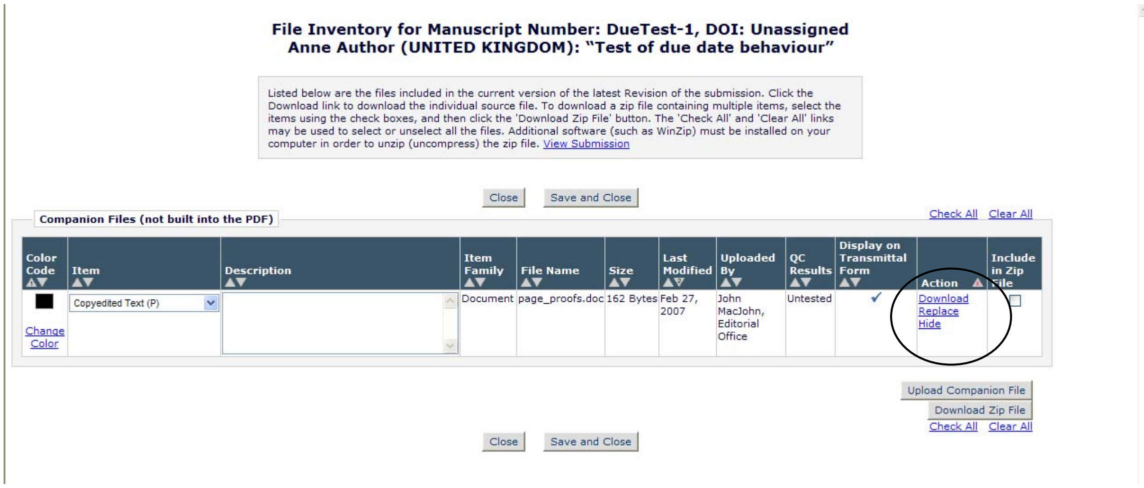
NOTE: The original companion file is not actually removed; it is hidden and will be available to users allowed to see hidden files.

If the user clicks the Remove link for a Newly Uploaded File, the following confirmation displays.



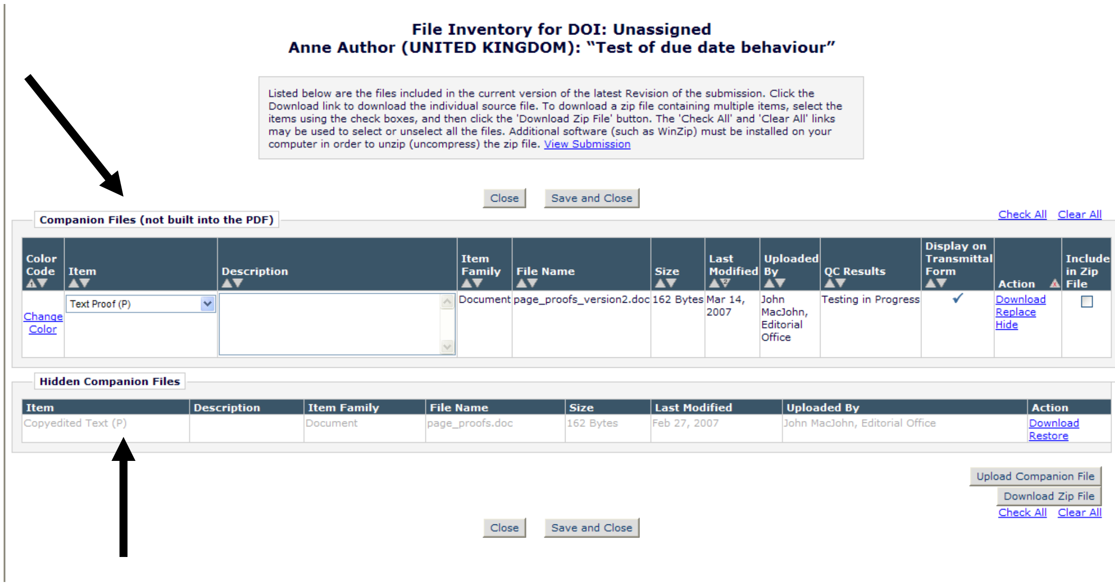
If the user clicks 'OK' to confirm, the Newly Uploaded File is removed and the Original Assignment File is restored.

Editor and Publisher roles with the existing 'Upload, Hide, or Restore' permission enabled can also see the Replace link for each companion file listed on the *File Inventory* page.



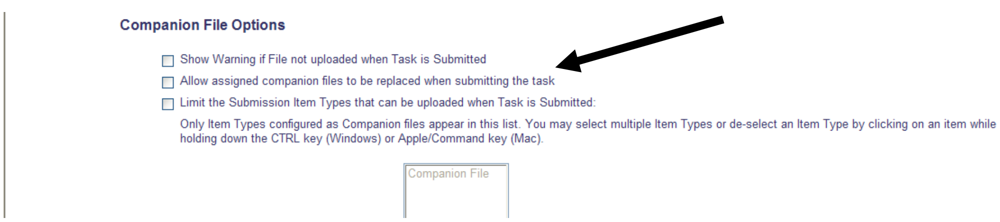
Clicking the Replace link navigates the user to the *Upload Companion File* page.

When the replacement file has been uploaded, the original file is automatically hidden, appearing under the 'Hidden Companion Files' heading. The newly uploaded replacement file is displayed under the 'Companion Files (Files not built into PDF)' heading.



TO CONFIGURE: No configuration is required for automatic replacement of companion files on the *File Inventory* page.

Production Tracking Users Only: To enable automatic replacement of companion files on the *Submit Production Task* page, click the Configure Production Tasks link in the Preprint Manager section of PolicyManager. Then click the Edit link for the task for which you want to activate this new feature. In the Companion File Options section of the *Edit Production Task* page, there is a new option 'Allow assigned companion files to be replaced when submitting the task'. Check the box to activate this feature (box is unchecked by default).



Itemization of Reminders Sent Count

Three situations have been identified where Editors or editorial staff might want to send a Reviewer a reminder letter:

1. A Reviewer has not yet replied to an invitation (*Reviewer Invited – No Response Report*)
2. The due date for a review is approaching (*Reviewer Reminder Report*, all reviews within x days of their due date)
3. A review is late (*Reviewer Reminder Report*, all reviews at least y days past their due date)

In version 5.0, Reviewer Reminder Reports displayed a single reminder count: '# Reminders Sent'. This counter included all Reviewer reminders sent for the current revision, but there was no indication as to what stage of the review process the submission was in when the reminder was sent.

This functionality is not problematic for the *Reviewers Invited – No Response Report*, as this report *only* includes submissions where the Reviewer has not yet responded to the invitation (i.e. total # of reminders sent can only apply to the first 'phase' – before the Reviewer agrees to review). Therefore, no changes are required to the *Reviewers Invited – No Response Report.*

However, the single reminder count was ambiguous on the *Reviewer Reminder Report*, because it was not clear whether the reminder was sent before the Reviewer agreed to review, before the review due date had elapsed, or after the review was late. Publications requested continued visibility for the total number of reminders sent, plus additional counters to indicate the number of reminders sent during each stage of review.

To satisfy these concerns, there are several changes to the *Reviewer Reminder Report* introduced in version 6.0:

- The existing column header '# Reminders Sent' is changed to 'Total # Reminders Sent'. There are no changes to the calculation of this data item.
- A new '# Invitation Reminders Sent' column – This value includes all reminders sent when the review invitation was still outstanding. These reminders would have been sent from the *Reviewers Invited – No Response Report*, but are included because they help make up the 'Total # Reminders Sent' calculation on the *Reviewer Reminder Report*.
- A new '# Reminders Sent Before Due Date' column – This value includes all reminders sent after the Reviewer has agreed to review, but the review has not yet been submitted and the Date Review Due has not yet passed.
- A new '# Reminders Sent After Due Date' column - This value includes all reminders sent after the Reviewer has agreed to review, but the review has not yet been submitted and the Date Review Due has already passed (i.e. review is late).

The sum of the three new columns normally equals the existing ‘Total # Reminders Sent’ count. However, this is not necessarily the case for submissions that were under review at the time the site was upgraded, or for reviews that were completed before the journal upgraded to 6.0:

- If a review is in progress before upgrade, and the Reviewer is sent reminders both *before and after* upgrade for the same submission, the ‘Total # Reminders Sent’ will NOT equal the sum of # Invitation Reminders Sent + # Reminders Sent Before Due Date + # Reminders Sent After Due Date.
- If reminders were sent for a review that was completed before upgrade, there is no detailed breakdown available for the new reminder counts.

Reviewer Reminder Report

Check the checkbox next to the Reviewer's name if you want to send that person reminder notices for reviews that are within 100 days of their due date.

Page: 1 of 1 (4 total submissions)   Display ALL results per pag

Check All Clear All

Send Reminder	Manuscript Number	Article Type	Manuscript Title	Reviewer Name	Handling Editor Name	Phone Number	Date Reviewer Invited	Date Reviewer Agreed	Date Review Due	Days Until Review Due	Date Last Reminder Sent	Total Elapsed Days	Total # Reminders Sent	# Invitation Reminders Sent	# Reminders Sent Before Due Date	# Reminders Sent After Due Date
☐	JBJS-D-03-01106 Details History	Clinical	Correlation of Hallux Valgus Surgical Outcome with AOFAS Forefoot Score and Radiological Parameters	Angus M. McBryde	Gene Hackman	803-434-7690	Jun 17, 2003	Jun 30, 2003	Mar 10, 2007	5	Mar 05, 2007	1357	4	0	0	1
☐	JBJS-D-03-01106 Details History	Clinical	Correlation of Hallux Valgus Surgical Outcome with AOFAS Forefoot Score	Robert A Arciero	Gene Hackman	860-679-6655	Jun 08, 2006	Mar 05, 2007	Mar 30, 2007	25	Mar 05, 2007	270	4	3	1	0

NOTE: Reviewer Due Dates can be re-set manually on a per-submission basis, so it is possible that a Reviewer would get a pre-due reminder, then a past due reminder, then another pre-due reminder (if the due date is extended).

Example: A Reviewer Due Date is approaching, and a reviewer reminder letter is sent from the *Reviewer Reminder Report* (this is counted in the Reminder Sent Before Due Date column). The Reviewer does not submit his review in a timely fashion, and goes past the original due date. Another reviewer reminder letter is then sent (and is counted in the Reminder Sent After Due Date column). The Reviewer requests additional time to complete the review and the Editorial Office extends the due date for an additional 7 days. After 4 of those 7 days elapse, another reviewer reminder letter is sent (and is counted in the Reminder Sent Before Due Date column - based on the extended due date). The reviewer reminder sent *after* the review was late, but *before* the due date was extended continues to be counted in the ‘Reminder Sent After Due Date’ column even if the due date is extended by the Editorial Office.

NOTE: The reminder counts on the Editor Reminder Reports and Author Reminder Reports are not changed.

The ‘# of Reminders’ continues to be displayed on the *People Information* page, and there is also a new hyperlink taking the user to further details.

NOTE: If a submission has 0 reminders sent, there is no hyperlink.

Reviews in Progress and Outstanding Invitations

MS Number	Date Invited	Date Agreed	Date Due	Elapsed Days	Days Late	Last Remind Date	# of Reminders	Handling Editor	Action
JBJS-D-03-01106	Jun 08, 2006	Mar 05, 2007	Mar 30, 2007	0	0	Mar 05, 2007	4	Gene Hackman, M.D.	View Submission Details History
JBJS-D-03-01134	Jun 19, 2006			259	0	Jun 22, 2006	1	Gene Hackman, M.D.	View Submission Details History
JBJS-D-03-01164	May 24, 2006	May 24, 2006	Jun 18, 2006	285	260	Mar 05, 2007	1	Gene Hackman, M.D.	View Submission Details History

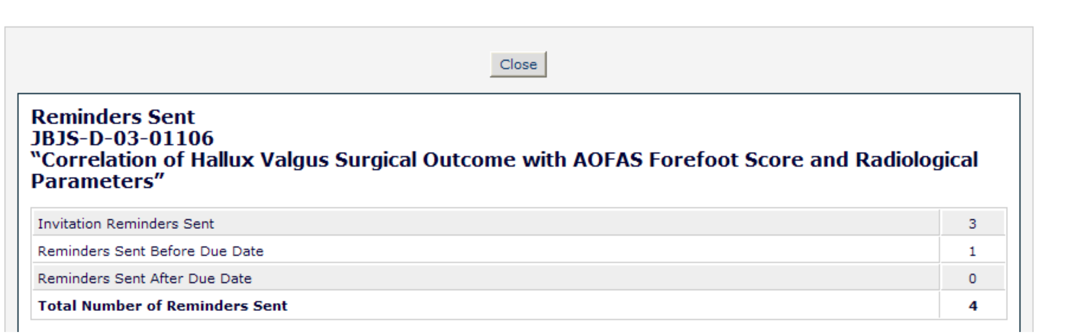
Completed Reviews

MS Number	Date Invited	Date Agreed	Date Completed	Days Late	# of Reminders	Recommendation	MS Rating	Reviewer Rating	Action
JBJS-D-03-01046	May 28, 2003	Jun 02, 2003	Jun 09, 2003	-13	0	A	0	0	View Submission Details History
STACEYTEST50-D-06-00009R1	Mar 05, 2007	Mar 05, 2007	Mar 05, 2007	-25	1	C+	0	0	View Submission Details History

Un-invited Before Agreeing to Review

MS Number	Date Invited	Date Un-invited	Action
			View Submission

Clicking the ‘# of Reminders’ hyperlink on the *People Information* page opens a pop-up window showing the detail of reminders sent in each review phase.

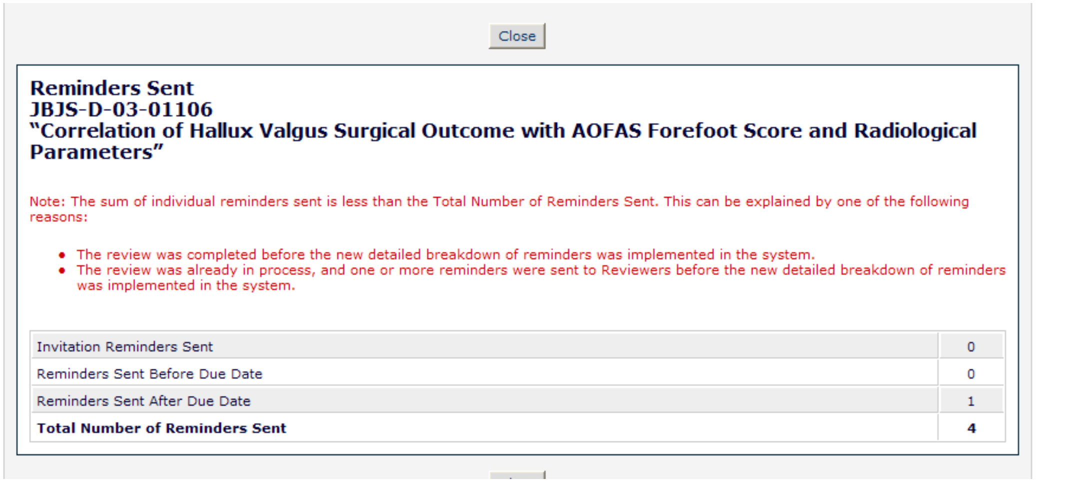


Close

Reminders Sent
JBJS-D-03-01106
“Correlation of Hallux Valgus Surgical Outcome with AOFAS Forefoot Score and Radiological Parameters”

Invitation Reminders Sent	3
Reminders Sent Before Due Date	1
Reminders Sent After Due Date	0
Total Number of Reminders Sent	**4**

As mentioned above, the sum of the individual values may not equal the ‘Total Number of Reminders Sent’. If this occurs, there is explanatory text on the page, explaining to the user why the total does not equal the sum of the parts.



Close

Reminders Sent
JBJS-D-03-01106
"Correlation of Hallux Valgus Surgical Outcome with AOFAS Forefoot Score and Radiological Parameters"

Note: The sum of individual reminders sent is less than the Total Number of Reminders Sent. This can be explained by one of the following reasons:

- The review was completed before the new detailed breakdown of reminders was implemented in the system.
- The review was already in process, and one or more reminders were sent to Reviewers before the new detailed breakdown of reminders was implemented in the system.

Invitation Reminders Sent	0
Reminders Sent Before Due Date	0
Reminders Sent After Due Date	1
Total Number of Reminders Sent	**4**

The new reminder count fields are also added to the *Reviewers & Submissions Custom Reports View*.

Custom Report - Reviewers & Submissions View

Select the fields to include in the report.

Check All Clear All

- Date Reviewer Invited
- Reviewer Has Not Responded
- Agree Date
- Review in Progress
- Reviewer Declined Invitation
- Reviewer Terminated
- Reviewer Uninvited
- Alternate Reviewer
- Alternate Reviewer Selection Date
- Reviewer Promoted
- Date Review Due
- Date Last Reminder Sent
- Total Number of Reminders Sent
- Number of Invitation Reminders Sent
- Number of Reminders Sent Before Due Date
- Number of Reminders Sent After Due Date
- Review Complete
- Reviewer Stop Date
- Total Days with Reviewer
- Reviewer Recommendation

TO CONFIGURE: No configuration is necessary.

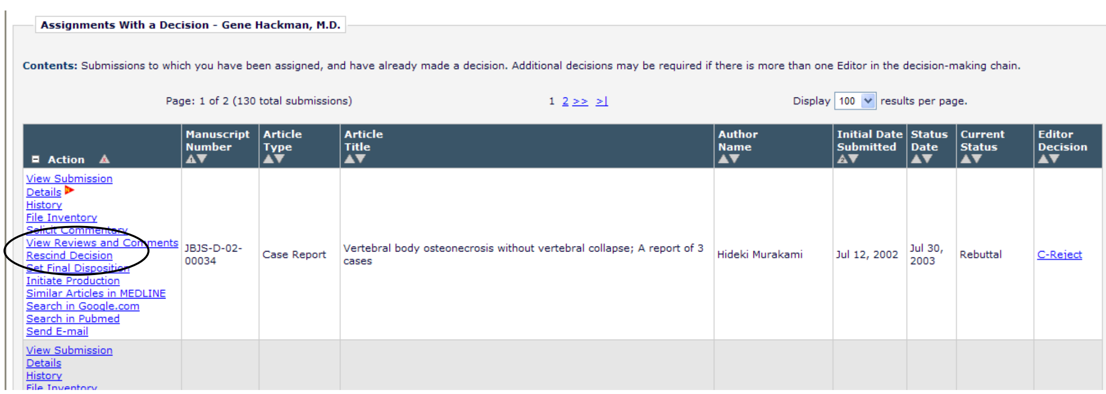
Rescind Decision

In EM version 5.0, Editor Decisions can be modified *before* the Author has been notified; by changing the Decision Term on the *Notify Author* page. However, a submission cannot then be assigned back to the Editor who made the Decision. Also, a Decision cannot be modified *after* the Author has been notified.

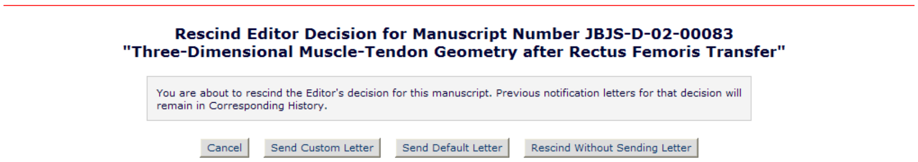
If a mistake is made or an Editor changes his mind in EM version 6.0, Editors and Editorial Offices now have the ability to rescind (undo) a Decision before or after the Author has been notified, or after the final disposition has been set (to Reject only). Once the Rescind Decision process is complete, the Editor can send the manuscript out for further review or make a new Decision. This is achieved with the following system enhancements:

For Editors and editorial staff with appropriate permission, the Rescind Decision action link is displayed in the following folders:

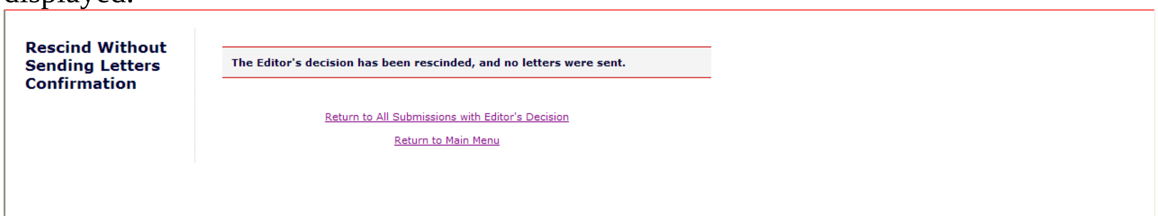
- My Assignments with Decision
- All Submissions with Decision folder
- Search Submissions
- Submissions out for Revision
- All Submissions with Final Disposition, and ONE related sub-folder:
  - Reject
  - Note: Accepted and Withdrawn submissions cannot have the decision rescinded
- My Assignments with Final Disposition



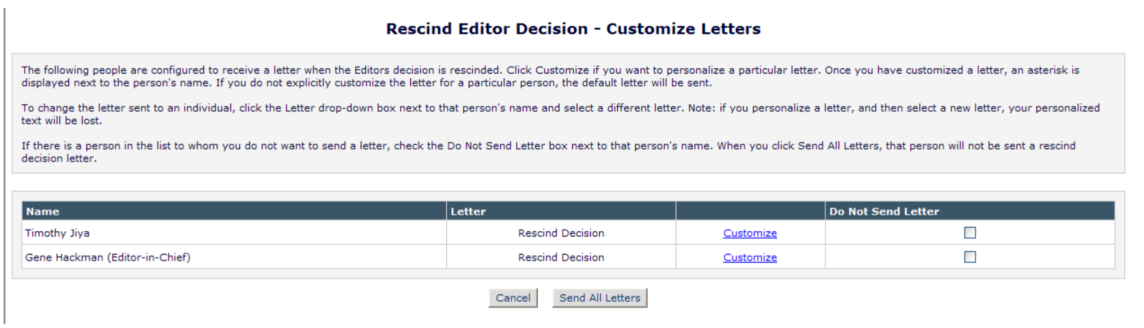
Clicking the Rescind Decision link navigates the user to a new page, confirming their intent to rescind the Decision. The user can then choose to rescind without sending a letter, send the default letter, or customize the letter.



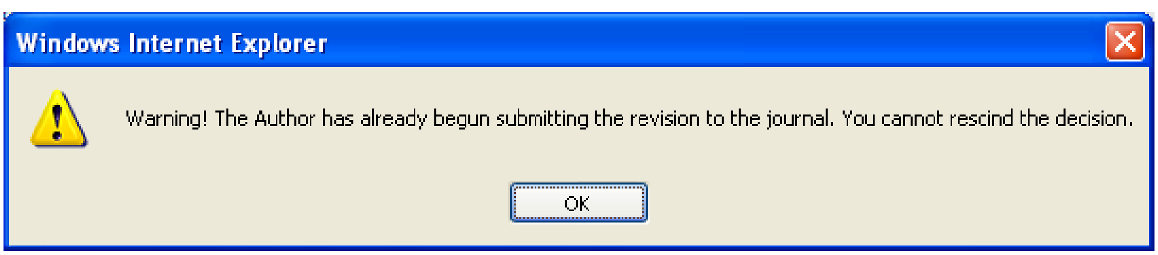
If the user clicks the 'Rescind without Sending Letter' button, a confirmation page is displayed.



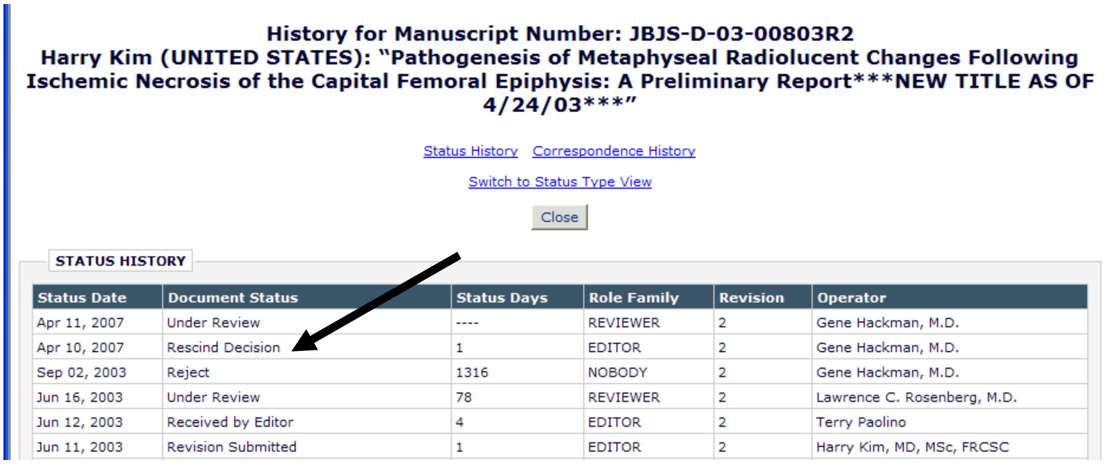
The user can also choose to send the default letter or customize the letter, using the standard Customize Letter functionality.



If the Author has already started working on his revision when the user clicks the Rescind Decision link, the Decision cannot be rescinded:



When a Decision is rescinded, the submission's document status will briefly change to 'Decision Rescinded' (so that the event is captured in Status History), and will then revert back to the previous status, before the Editor's decision was submitted.



History for Manuscript Number: JBJS-D-03-00803R2
Harry Kim (UNITED STATES): "Pathogenesis of Metaphyseal Radiolucent Changes Following Ischemic Necrosis of the Capital Femoral Epiphysis: A Preliminary Report***NEW TITLE AS OF 4/24/03***"

Status History Correspondence History

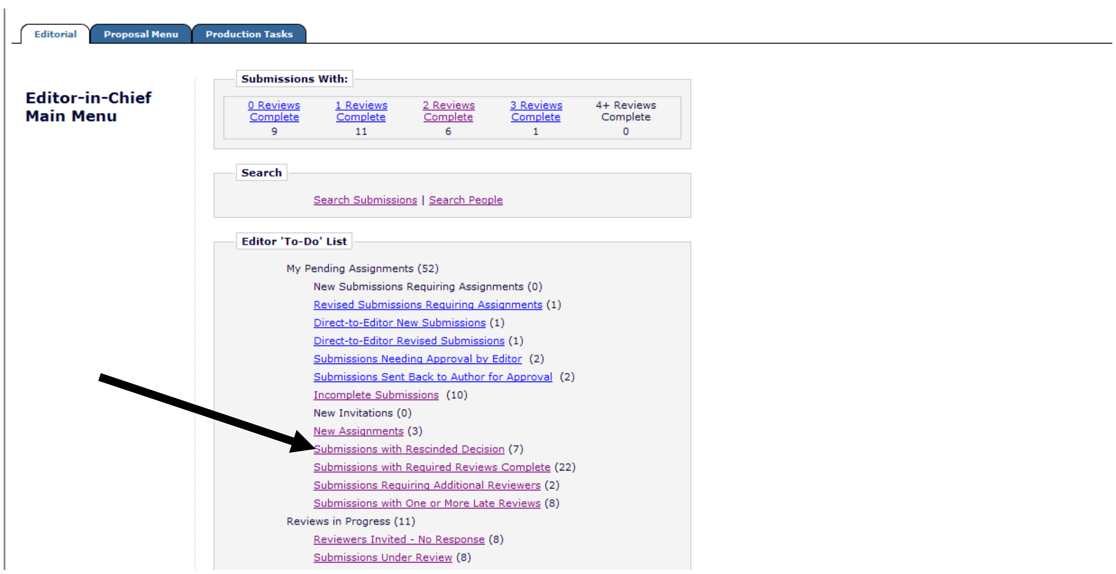
Switch to Status Type View

Close

STATUS HISTORY

Status Date	Document Status	Status Days	Role Family	Revision	Operator
Apr 11, 2007	Under Review	----	REVIEWER	2	Gene Hackman, M.D.
Apr 10, 2007	Rescind Decision	1	EDITOR	2	Gene Hackman, M.D.
Sep 02, 2003	Reject	1316	NOBODY	2	Gene Hackman, M.D.
Jun 16, 2003	Under Review	78	REVIEWER	2	Lawrence C. Rosenberg, M.D.
Jun 12, 2003	Received by Editor	4	EDITOR	2	Terry Paolino
Jun 11, 2003	Revision Submitted	1	EDITOR	2	Harry Kim, MD, MSc, FRCSC

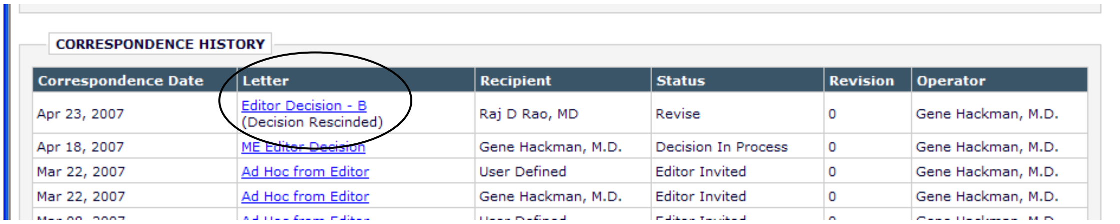
The submission moves to a new *Rescinded Decisions* folder, where the Editor can take additional action on the submission. Note the submission does not simply move back to the folder it was in before the Decision was made originally, this is to make sure the submission does not get 'lost' in the system (i.e. in the *Required Reviews Complete* folder).



NOTE: Decisions made before the upgrade to version 6.0 cannot be rescinded. The <u>Rescind Decision</u> link will be suppressed for submissions where the decision was made prior to 6.0.

NOTE: When a Decision is rescinded, the Author notification letter remains in Correspondence History for Editors, but is not made available to the Author.

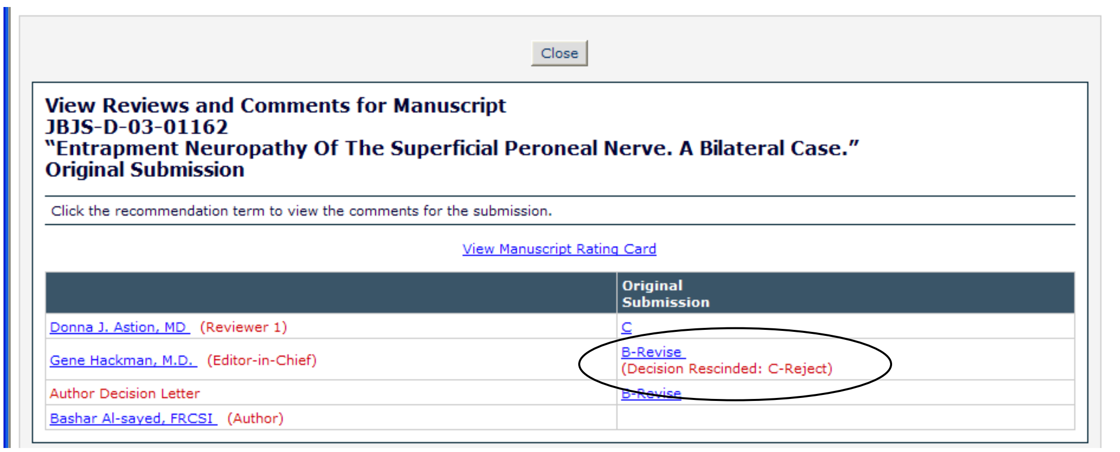
The Correspondence History will show the e-mail that went out with each Decision. Although an original Decision Letter cannot be removed from Correspondence History, a particular Decision Letter in History that was rescinded will show the label 'Decision Rescinded' on the *History* page.



CORRESPONDENCE HISTORY

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Apr 23, 2007	Editor Decision - B (Decision Rescinded)	Raj D Rao, MD	Revise	0	Gene Hackman, M.D.
Apr 18, 2007	~~ME Editor Decision~~	Gene Hackman, M.D.	Decision In Process	0	Gene Hackman, M.D.
Mar 22, 2007	Ad Hoc from Editor	User Defined	Editor Invited	0	Gene Hackman, M.D.
Mar 22, 2007	Ad Hoc from Editor	Gene Hackman, M.D.	Editor Invited	0	Gene Hackman, M.D.

Rescinded Decisions are presented on the Editor's *View Reviews and Comments* page. A message 'Previous Decision Rescinded' is displayed alongside the Decision Term, without a link to a letter.



Close

View Reviews and Comments for Manuscript
JBJS-D-03-01162
"Entrapment Neuropathy Of The Superficial Peroneal Nerve. A Bilateral Case."
Original Submission

Click the recommendation term to view the comments for the submission.

View Manuscript Rating Card

	Original Submission
Donna J. Astion, MD (Reviewer 1)	C
Gene Hackman, M.D. (Editor-in-Chief)	B-Revise (Decision Rescinded: C-Reject)
Author Decision Letter	~~B-Revise~~
Bashar Al-sayed, FRCSI (Author)	

What does the Author see when a decision is rescinded?

Although there are no changes to the layout of Author pages, it is important to note the 'movement' of a submission when a Decision is rescinded. If a manuscript is in the Author's *Submissions with a Decision* folder (i.e. the paper has been rejected) and the Decision is rescinded, the submission moves out of the *Submissions with a Decision* folder, and back into the *Submissions Being Processed* or *Revisions Being Processed* folder, as appropriate.

If a manuscript is in the *Submissions Needing Revision* folder (i.e. the Editor rendered a revise Decision and the Author has not yet started to submit the revision) and the Decision is rescinded, the submission moves out of the *Submissions Needing Revision* folder, and back into the *Submissions Being Processed* or *Revisions Being Processed* folder, as appropriate.

NOTE: If the Author has started submitting the revision (i.e. manuscript is in the *Incomplete Submissions Being Revised* or *Revisions Waiting for Author's Approval* folders), the Editor is not allowed to rescind his Decision.

A new line item is added to the Editor Performance Statistics section of the *Editor Performance Report (EPR)*, showing the 'Total Number of Decisions Rescinded'. This calculation is based on the date the Decision was rescinded, not the date the Editor made the Decision. In addition, the submission with a rescinded Decision is 'credited' to the Editor who made the last Decision (not necessarily the person who clicked the Rescind Decision action link and performed the rescind). For example:

- Assume Ed Editor made a Decision on December 30, 2006. That Decision was rescinded by Mary Smith in the journal office on January 5, 2007.
- If the EPR is run for Mary Smith, the submission would NOT be counted in the Decision rescinded "bucket".
- If the EPR is run for Ed Editor, for Last Year, the submission would NOT be counted in the Decision rescinded bucket.
- If the EPR is run for Ed Editor for the Current Year, the submission WOULD be counted in the Decision rescinded bucket.

NOTE: A single submission could have more than one Decision rescinded. The calculation on this report should count the number of times a Decision was rescinded; not the number of submissions.

Editor Performance Statistics

This section provides key indicators of turnaround time and Reviewer utilization for this Editor.

Average Time from Assigned to First Reviewer Assigned (Initial Submissions) *Average number of days between this Editor being assigned and the first Reviewer being assigned for initial submissions only. The calculation is based on Editor assignments during the specified time period. Note that the journal office may invite the Reviewer; it does not have to be this Editor who actually invites the Reviewer.*	0
Average Time from Assignment to First Reviewer Assigned (Revisions) *Average number of days between this Editor being assigned and the first Reviewer being assigned for revisions only. The calculation is based on Editor assignments during the specified time period. Note that the journal office may invite the Reviewer; it does not have to be this Editor who actually invites the Reviewer.*	0
Average Time from Assignment to Subordinate Editor Assignment (All Submissions) *Average number of days between this Editor being assigned and a subordinate Editor being assigned. This calculation is for initial submissions and revisions.*	0
Average Number of Reviewers per Submission *Average number of Reviewers assigned to each manuscript while this Editor was the handling Editor. The calculation is based on submissions where the Editors decision was made during the time period, and counts only reviews that were complete at the time the decision was made. It includes Reviewers who may have been invited by someone else (e.g. journal staff) while this Editor was the Handling Editor.*	1
Total Number of Reviewers Utilized *Total number of Reviewers who completed reviews on submissions this Editor made a decision on during the specified time period.*	11
Number of Unique Reviewers Utilized *Total number of unique Reviewers who completed reviews on submissions this Editor made a decision on during the specified time period.*	11
Time to Decision *Average number of days from the time this Editor assumed responsibility for making the decision, to the date the decision was submitted. Calculation is based on decisions made by this Editor during the specified time period.*	66[illegible]4
Total Number of Decisions Rescinded *Total number of times a decision was rescinded for a submission this Editor had made a decision for. Calculation is based on the date the decision was rescinded (i.e. it is possible that the decision was made prior to the start of the specified time period, but the decision was rescinded during the specified time period).*	1

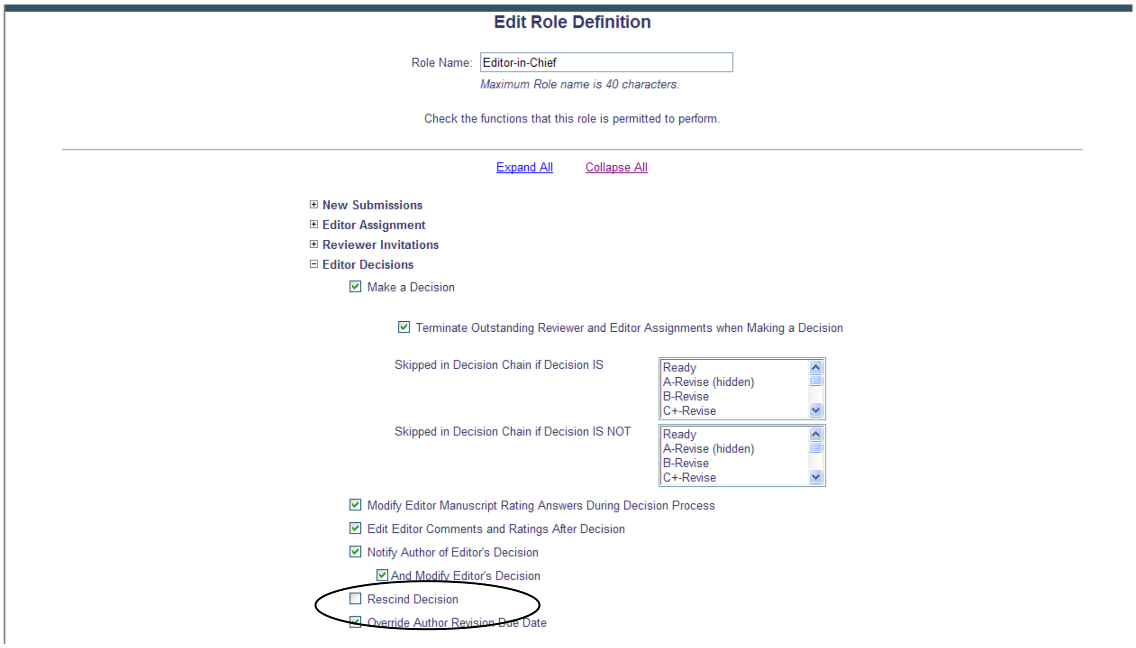
People Information Page

Back to Editor Performance Report

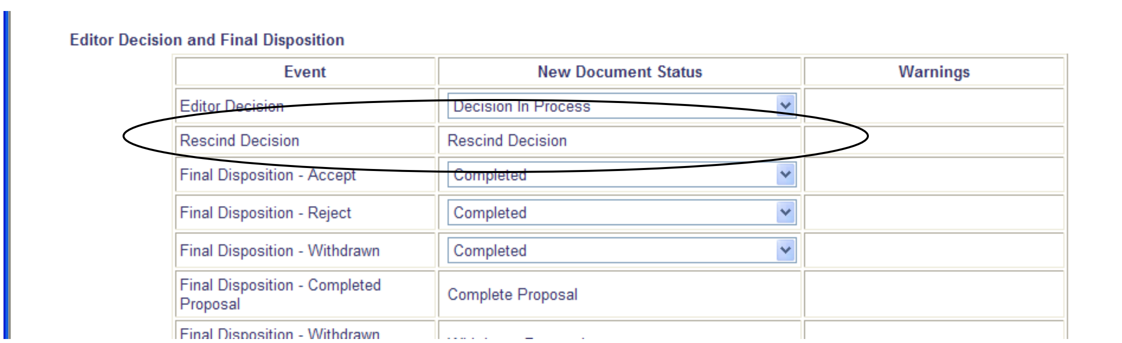
TO CONFIGURE: Go to Editor RoleManager to give Editors permission to 'Rescind Decision'. When this permission is enabled, the new Rescind Decision action link is displayed for an Editor on the following pages, *whether or not* the Author has already been notified:

- My Assignments with Decision
- All Submissions with Decision

- Search Submissions (if the submission already has a decision, whether or not the Author has been notified)
- Submissions out for Revision
- All Submissions with Final Disposition
  - Submissions with Final Disposition Reject (sub-folder)
- My Assignments with Final Disposition



A new event named 'Rescind Decision' is added to the 'Editor Decision and Final Disposition' section of ActionManager. When a Decision is rescinded, the submission status changes briefly to 'Decision Rescinded', and then automatically reverts to the previous status (before the decision was made). This allows the rescind action to be displayed clearly in the *Status History*.



NOTE: If the Editorial Office desires a letter be sent when a Decision is rescinded, a new letter must be created using the 'General' Letter Family.

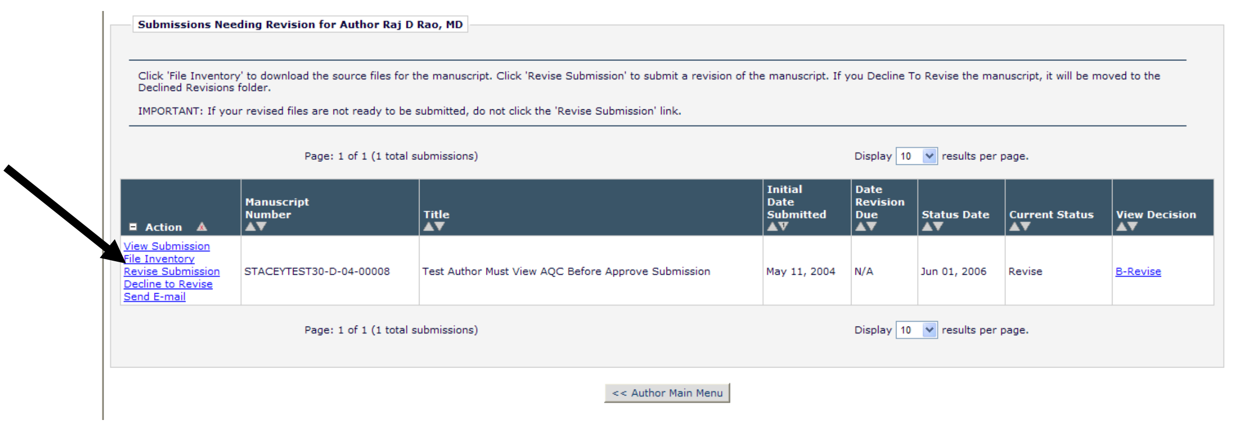
A new ‘Decision Rescinded’ status is displayed on the *Edit Document Status* page in PolicyManager. No action is required on this page, but if the Editorial Office prefers to change the text ‘Decision Rescinded’ to something else, they can do so on this page.

New Submit Revision Alert Message

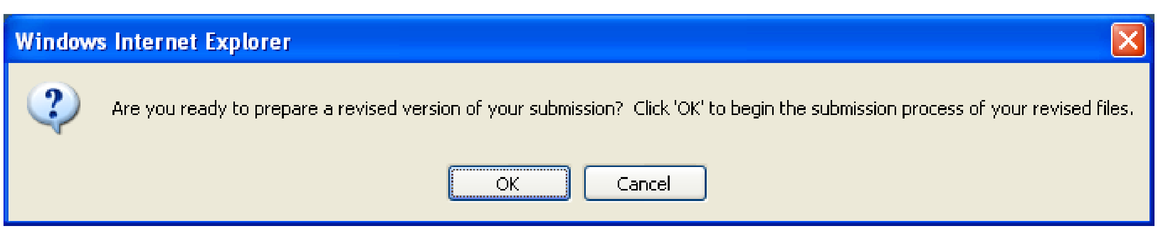
In the past, publications have reported instances of Author confusion with regards to how a revision should be submitted. In EM version 5.0, when the Author clicked the Submit Revision link on the *Submissions Needing Revision* page, the following alert was displayed.

This alert made some Authors nervous, because they thought they should already have provided their revised files somewhere in the system. They did not realize that they would be brought through the submission steps again if they click ‘OK’. This ambiguity is eliminated with the following system enhancements:

1. The Submit Revision action link is changed to Revise Submission.



2. The alert text is clarified, so the Author realizes that clicking ‘OK’ will lead him through the submission process for the revised file.



TO CONFIGURE: No configuration required.

Deep Link for Downloading Reviewer Attachments

Reviewer Attachments is a Preprint Manager feature. A publication must have the 'Reviewer Attachments' feature enabled in order to make use of the new deep-links for Reviewer Attachments.

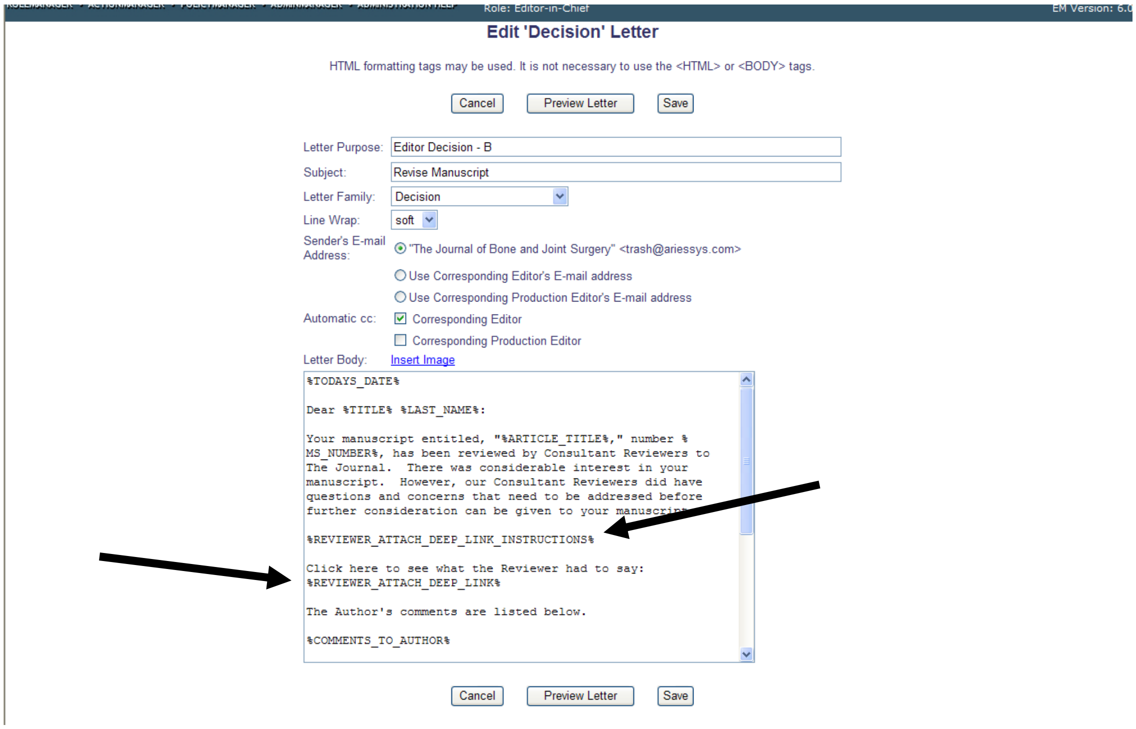
Deep links are mail-merge fields used in letter templates that insert a task-specific URL into e-mail correspondence. Clicking on the URL in the e-mail automatically logs the recipient into the system and brings them to the correct submission, or carries out a specific action (such as accepting a review).

In PM version 5.0, when a publication is using the 'Reviewer Attachments' feature, Reviewers may upload files (referred to as Reviewer Attachments) in conjunction with submitting their review. The Editor has the option of making these attachments available to the Author, but there is no automatic way to inform the Author that there is a Reviewer Attachment. The Editor or Editorial Office must be sure to include a note in the decision letter. The Reviewer Attachments are displayed on the *Reviewer Attachment* page (accessible via the View Reviewer Attachments link in the Author's *Submissions Needing Revision* and *Submissions with a Decision* folders).

In PM version 6.0, two new deep-link merge fields are introduced to facilitate notifying Authors that there are Reviewer Attachments available:

- %REVIEWER_ATTACH_DEEP_LINK% - This merge field is a direct link to the Author's version of the *Reviewer Attachment* page, and also logs the Author into the system.
- %REVIEWER_ATTACH_DEEP_LINK_INSTRUCTIONS% - This merge field pulls in the custom Reviewer Attachment Deep Link instructions created in PolicyManager.

Administrators can type the new deep link mail-merge fields into Decision letter templates.

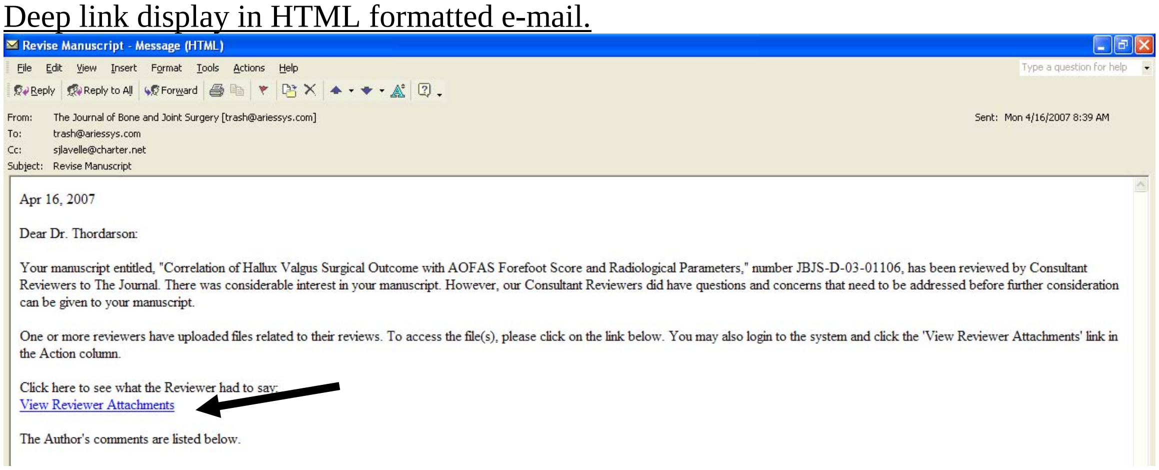


NOTE: These merge fields are available for inclusion in the Decision letter only.

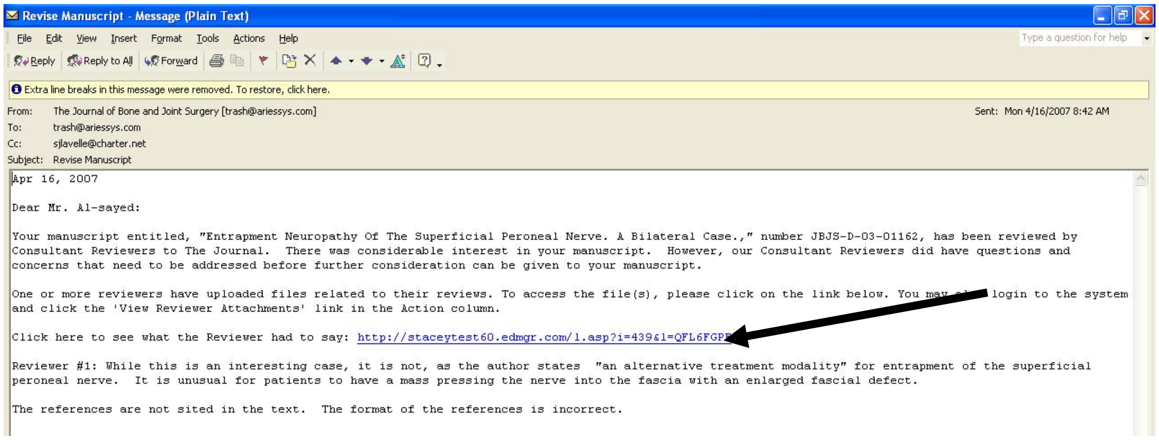
NOTE: The merge fields are populated in the letter only if there are Reviewer Attachments which have been made available to the Author.

When the Decision letter is sent to an Author, the merge field is converted to a URL that the user can click on, or copy and paste into a browser.

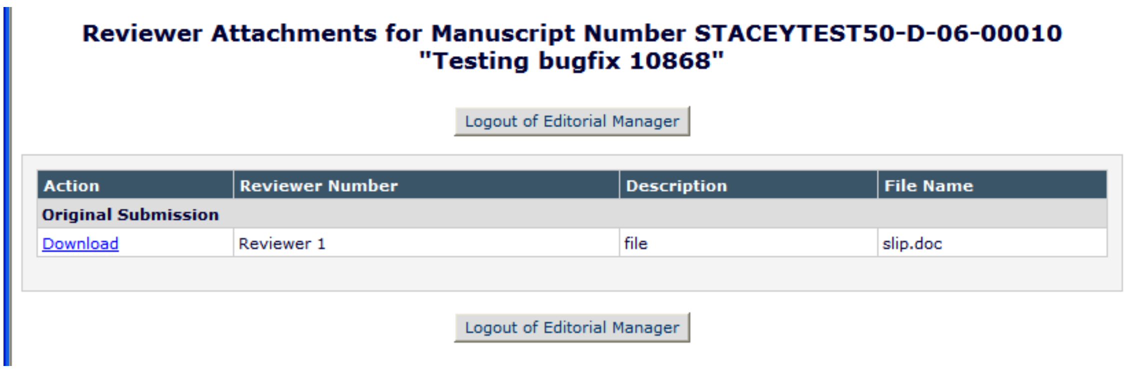
<u>Deep link display in HTML formatted e-mail.</u>



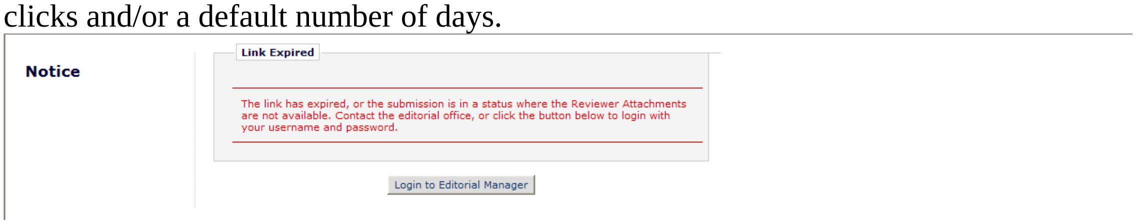
<u>Deep link display in Text formatted e-mail.</u>



Clicking the deep link URL takes the user directly to the *View Reviewer Attachments* page.



The URL will expire according to the publication's policy after a default number of clicks and/or a default number of days.



NOTE: The deep link is valid only if the submission is currently in one of the following Author folders; otherwise the Author is taken to a page explaining that the submission is not in a state that allows this action.

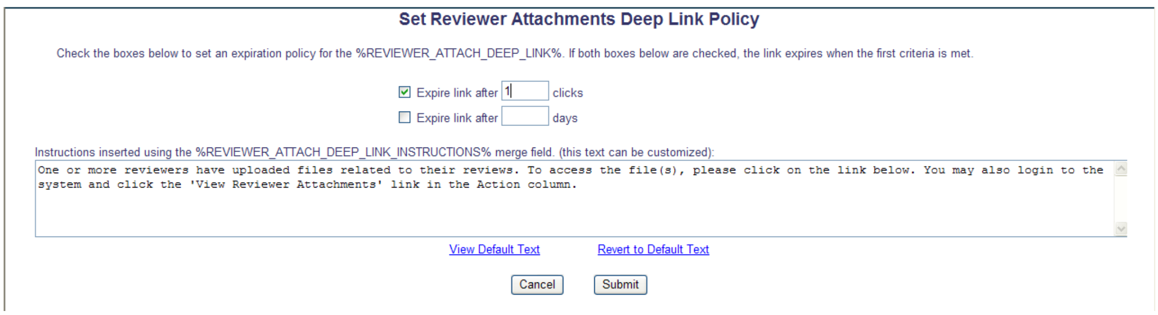
- *Submissions Needing Revision*
- *Incomplete Submissions Being Revised*
- *Revisions Waiting for Author's Approval*
- *Submissions with a Decision*

TO CONFIGURE: To take advantage of this feature, the publication must be configured to use the Reviewer Attachments feature (this is handled by Customer Service outside of the system).

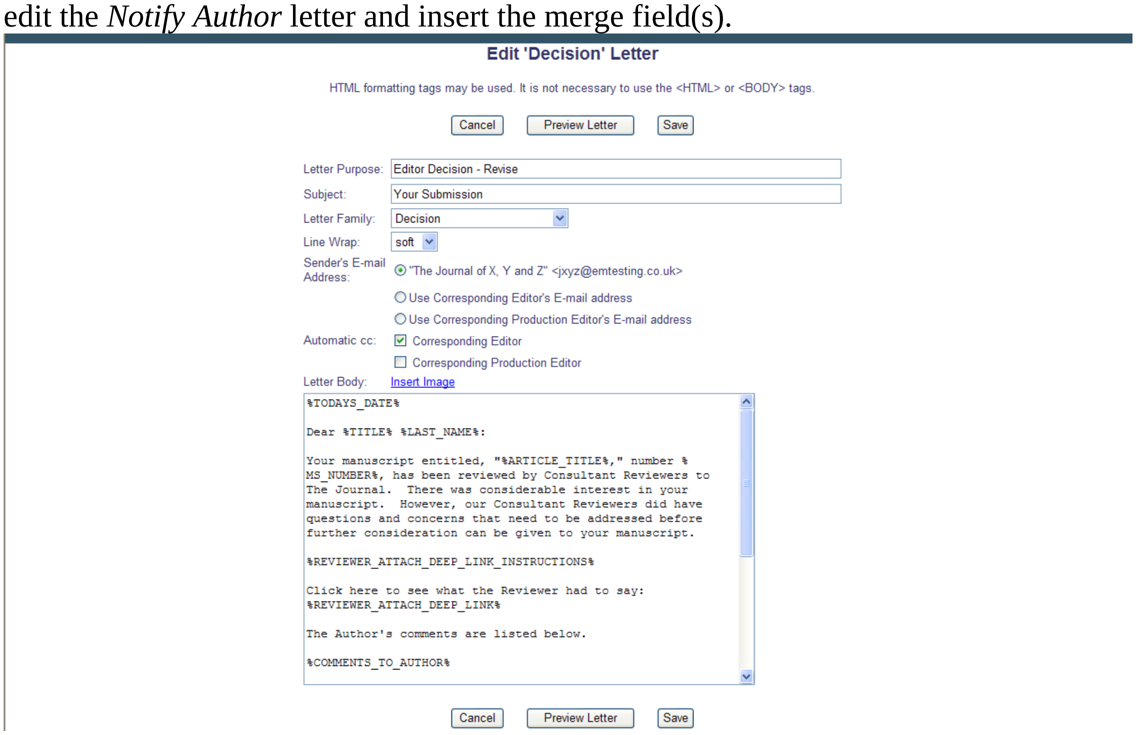
To set the deep link expiration policy, click the Set Reviewer Attachments Deep Link Policy link in the Preprint Manager section of PolicyManager. Then specify the expiration policy for the deep link (i.e. how long the link is active):

- At time of upgrade, the option ‘Expire link after 1 clicks’ is selected.
- If neither option is selected (both boxes are unchecked), the deep link will remain active indefinitely.

You may also create customized instructions for the Reviewer Attachment deep link, which can be inserted into the Author’s copy of the Decision Letter using the %REVIEWER_ATTACH_DEEP_LINK_INSTRUCTIONS% merge field. The default instructions are shown in the mockup below.



To insert the Reviewer Attachment deep links into the *Notify Author* letter template, click the Edit Letters link in the E-mail and Letter Policies section of PolicyManager. Then edit the *Notify Author* letter and insert the merge field(s).



Allow for Non-working Days in Due Date Calculations

A new PolicyManager setting allows Administrators to configure either calendar days or working days for publication-wide due date calculations. This setting is used in conjunction with the following due date calculations:

- Reviewer Due Dates
- Production Task Due Dates (production tracking users only) – Applies to the following production dates:
  - Number of Days after Assignment Date
  - Number of Days prior to Submission Target Online Publication Date
  - Number of Days prior to Schedule Group Target Online Publication Date
  - Number of Days prior to Schedule Group Target Publication Date
- Author Invitation Due Dates
- Author Invited Submission Due Dates
- Author Revision Due Dates

If a journal is configured to use only working days, all future due date calculations will be modified to exclude Saturdays and Sundays.

NOTE: If a journal changes from one calculation method to another, due dates that have previously been calculated *are not* recalculated. The new method will apply to *future* invitations, assignments, and tasks.

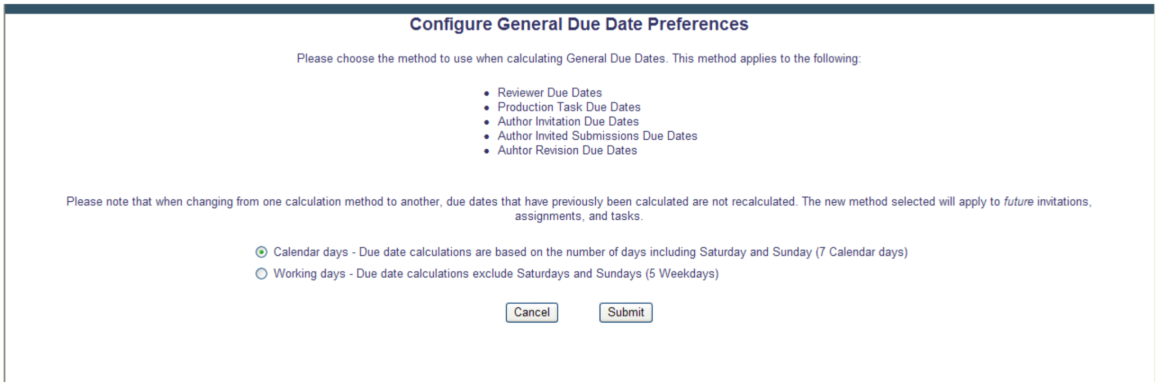
Take the example of a task that should take 3 days to complete: if assigned on a Monday, it will be due on Thursday; if assigned on a Friday, it will be due the following Wednesday, five calendar days later, because of the two weekend days that are not counted.

Due dates based on 'days before [target date]' will also take non-working days into consideration when these due dates are calculated.

Examples:

- A Production Task set to be due 30 *working* days prior to a Monday, February 12, 2007 Schedule Group Target Publication Date is due on Monday, January 1, 2007; 30 *working* days prior to the Target Publication Date.
- A Reviewer Invitation is assigned 14 *working* days to be completed. If the Reviewer Due Date is assigned on Friday, February 16, 2007, it is due on Thursday, March 8, 2007; 14 *working* days later, excluding all weekend days.
- An Author Revision Due Date assigned on Wednesday, February 21, 2007 that is set to be due 7 *working* days after the assignment date is due on Friday, March 2, 2007; 7 *working* days later, excluding all weekend days.

TO CONFIGURE: Go to PolicyManager, and click the Configure General Due Date Preferences link in the General Policies section. Then choose whether due date calculations will be based on Calendar days or Working days.



NOTE: Calendar days is the default selection at time of upgrade.

Ad Hoc Correspondence Enhancements

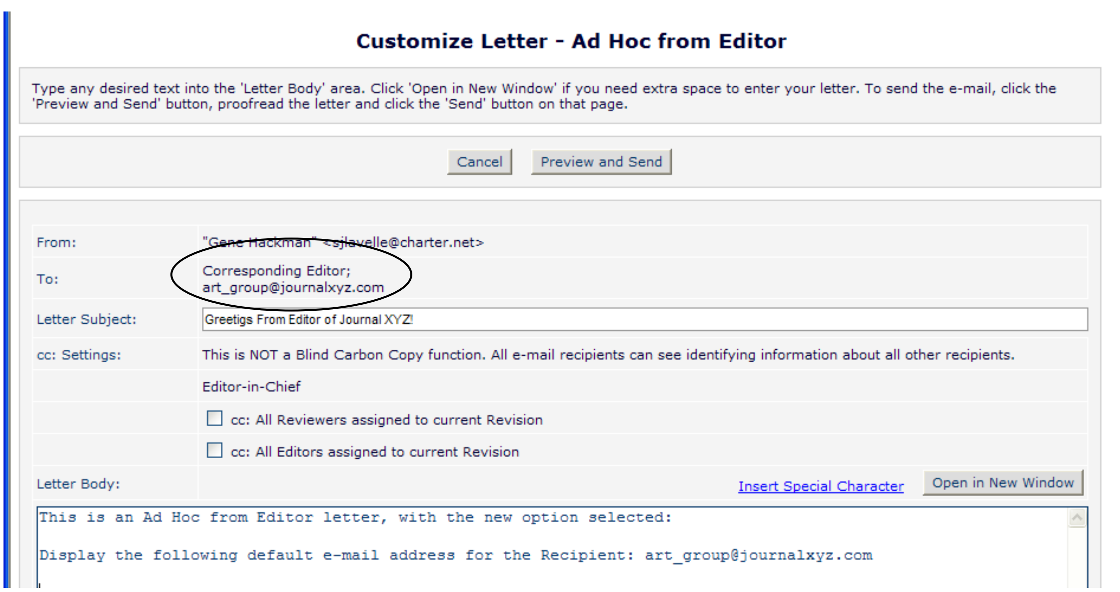
Three new options are added to the Edit Letter templates for *Ad-Hoc from Editor* letters and *Ad-Hoc from Publisher* letters. Two of these three options are also available for *Ad-Hoc from Author* and *Ad-Hoc from Reviewer* letter templates. Each option is selectable with checkboxes for configuring Ad-Hoc letter templates:

- A new **To:** option to allow a blank text box to be used, to indicate a user must manually type a **To:** address when sending this type of Ad-Hoc letter from the system. This blank text box option will be limited to Ad-Hoc from Editor/Publisher letters to limit potential security risks associated with use by Authors and Reviewers.
- A new **To:** option that allows the Administrator to manually type an e-mail address to be used as a default for this template. This allows the customer to set up a group in-box (e.g. an "art-group" inbox) and route specific queries to that group.
- A new **cc:** option to match this template-wide, manually-typed default e-mail address, allowing Ad-Hoc letters to be automatically cc'd to an e-mail address.

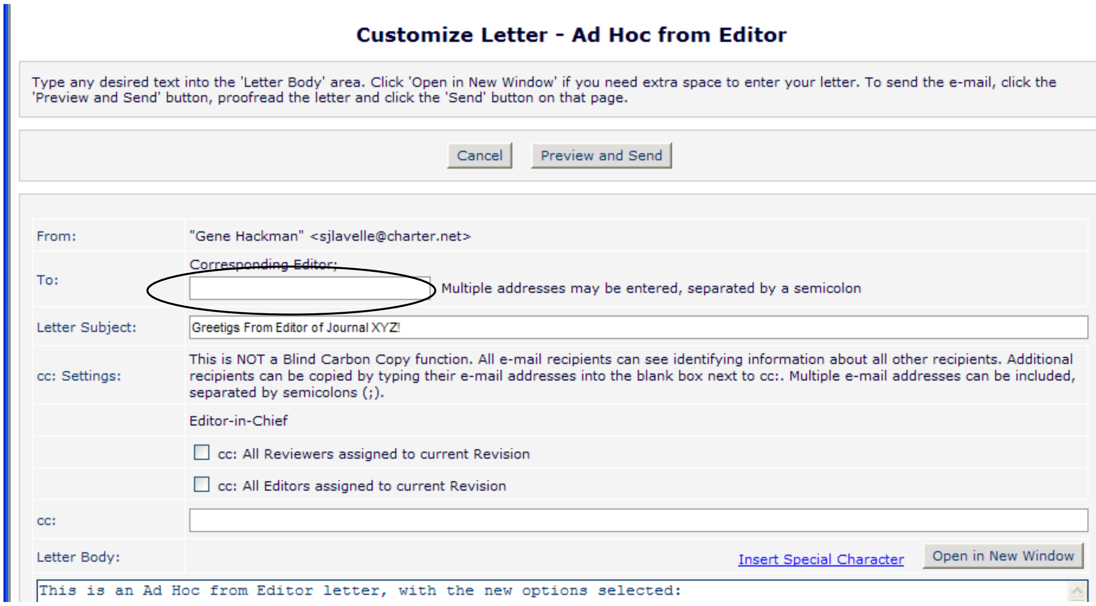
As per current functionality, these options are selectable in addition to the other **To:** and **cc:** options when configuring Ad-Hoc emails.

If the Administrator has indicated a blank **To:** e-mail option for an *Ad-Hoc from Editor* or *Ad-Hoc from Publisher* letter template, the end-user will be able to type in the destination e-mail. If the Administrator has entered a free-text default e-mail address into the Ad-Hoc template, this will appear as a default address for the selected template, and the user will not be able to edit it (as per current **To:** functionality).

<u>Sample letter with default To: address of art_group@journalxyz.com.</u>



Sample letter with blank text box so user can enter To: address when sending the letter



Sample letter with Automatic cc to a particular e-mail address(es)

Ad Hoc Letters are captured in Correspondence History. If a letter configured with the 'Display blank textbox so sender can insert any e-mail address for a recipient' option is sent, the text 'User Defined' is shown in the 'Recipient' column.

CORRESPONDENCE HISTORY

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Apr 16, 2007	Ad Hoc from Editor	User Defined	Under Review	1	Gene Hackman, M.D.
Apr 16, 2007	Ad Hoc from Editor	Gene Hackman, M.D.	Under Review	1	Gene Hackman, M.D.
Apr 11, 2007	Ad Hoc from Editor	User Defined	Under Review	1	Gene Hackman, M.D.
Apr 11, 2007	Ad Hoc from Editor	Gene Hackman, M.D.	Under Review	1	Gene Hackman, M.D.
Mar 22, 2007	Ad Hoc from Editor	User Defined	Under Review	1	Gene Hackman, M.D.
Mar 22, 2007	Ad Hoc from Editor	Gene Hackman, M.D.	Under Review	1	Gene Hackman, M.D.

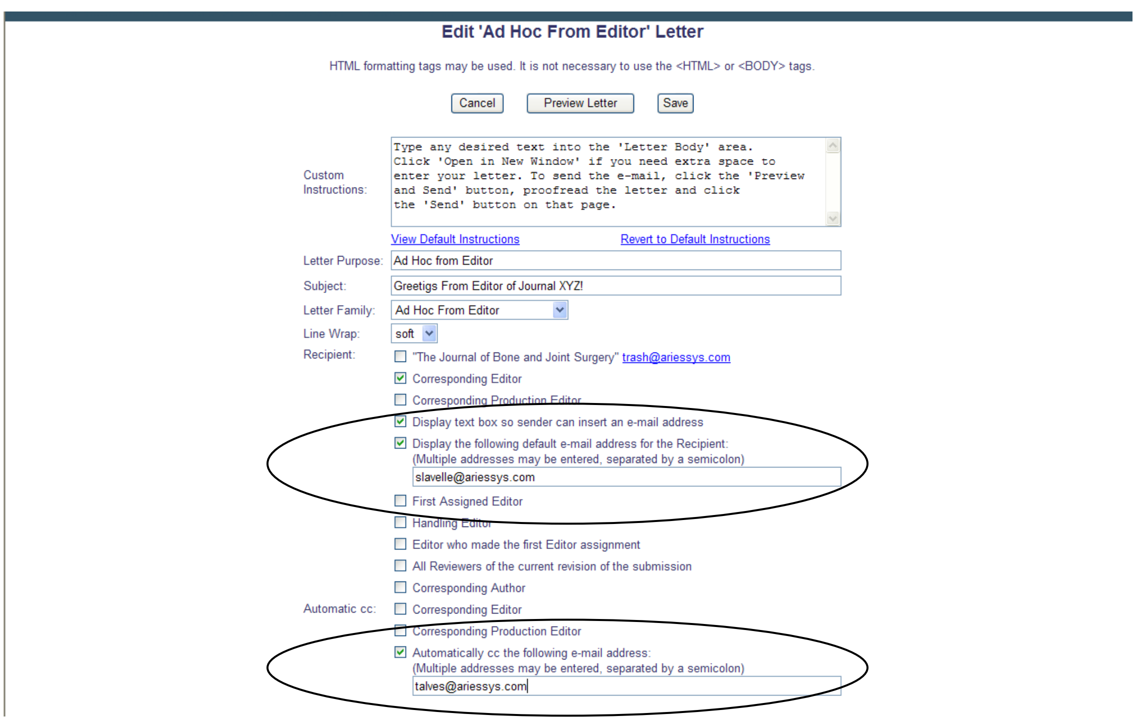
TO CONFIGURE:

Ad-Hoc from Editor or Ad-Hoc from Publisher Letters

If the 'Display blank textbox so sender can insert any e-mail address for a recipient' option is selected, an Ad-Hoc from Editor or Ad-Hoc from Publisher letter will display an empty text box for the 'To:' field on the *Customize Ad-Hoc Letter* page.

If the 'Use the following e-mail address as the default value for the recipient' option is selected, an Ad-Hoc from Editor or Ad-Hoc from Publisher letter will display the e-mail address entered into this text box in the 'To:' field on the *Customize Letter – Ad-Hoc from Editor/Publisher* page. To ensure that the e-mail address displayed for this recipient setting is always delivered the message, it cannot be cleared or removed by the user.

If the 'Automatically cc the following e-mail address' option is selected, an Ad-Hoc from Editor or Ad-Hoc from Publisher letter will display the e-mail address entered into this text box in the 'cc' field on the *Customize Letter – Ad-Hoc from Editor/Publisher* page. To ensure that the e-mail address displayed for this cc setting is always copied on the message, it cannot be cleared or removed by the user.

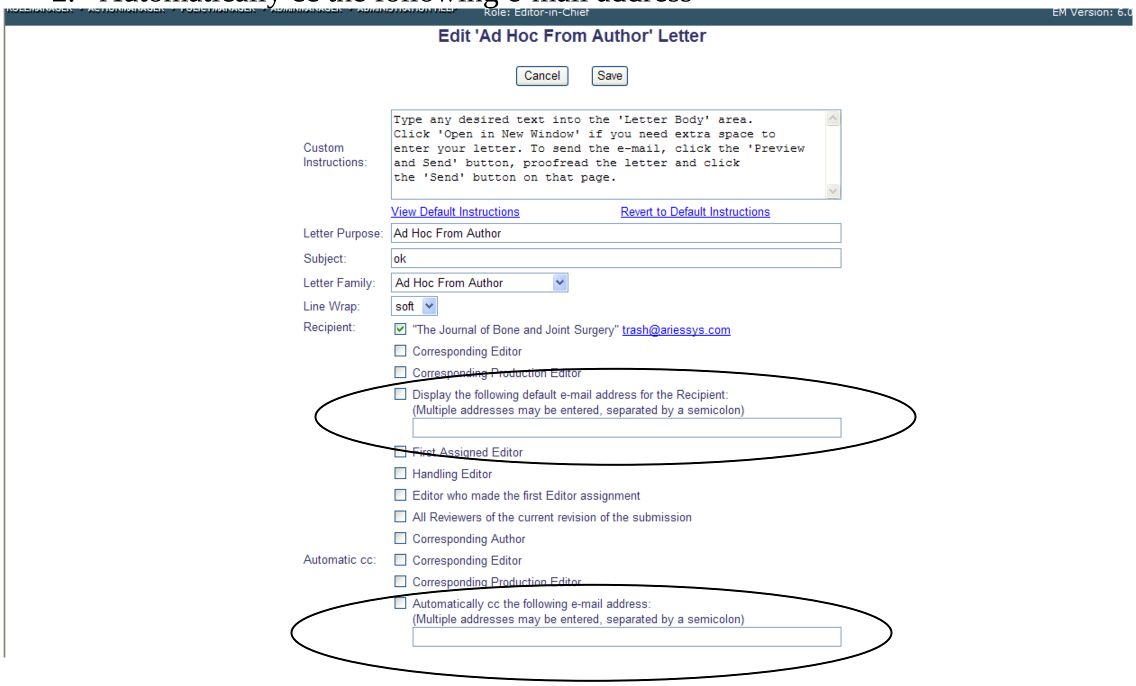


Configuration Note: Because these recipient and cc e-mail delivery options are not necessarily attached to a 'system defined' user (i.e. a registered EM user), people merge fields present in the Ad-Hoc letter template cannot be populated. It is recommended that the default text of these letter templates should be configured accordingly; without people merge fields.

<u>Ad-Hoc from Author or Ad-Hoc from Reviewer Letters</u>

The following two options are available for these letters, and function exactly as described above:

1. Use the following e-mail address as the default value for the recipient
2. Automatically cc the following e-mail address



Custom Details

In EM version 5.0, the *Details* pages (Editorial Details, Production Details and Proposal Details) have a standardized layout, which does not give users any choice in the content of what is displayed, or the order in which the information appears on the page.

New 6.0 functionality allows publications to create custom layouts to use in place of each of these pages, customizing the following information:

- Select which data items are displayed on the page. This includes the extension of new data elements that were not previously visible on any *Details* pages
- Create Section Headings to visually organize the page
- Define the order in which sections and selected items appear on the page.
- Specify anchor links to frequently used items on the page
- Decide which action links (e.g. Transmittal Form, Technical Check, Publish Information, etc.) are displayed on the page. Note that RoleManager permissions take precedence over these settings.

The selection of a custom layout is role-based, allowing publications to create layouts tailored to specific roles if they wish. Existing permissions for individual fields or links are also applied within the layout to suppress individual items for specific roles, allowing users to share basic layouts but fine-tune these for certain roles.

Other new features include:

- The 'Initiate Production' and 'Set Final Disposition' functionality is moved from the *Details* page to the 'Action' link column in the main folders. This allows *Details* pages to only be used to view and edit data, not to progress manuscripts through the workflow.
- Allows users to quickly review Alternate Contact Information for Corresponding Authors; it:
    - Adds a link to the *People Information* page for the Corresponding Author to the *Details* page.

Note some additional enhancements to the *Details* page display.

- The Final Disposition Term is now displayed as text; the actual setting of the Final Disposition now takes place via an action link in the appropriate Editor folders.
- Additional Manuscript Details are now accessed via a link (instead of the button in 5.0).
- The name of the Corresponding Author is now displayed as a hyperlink to the *People Information* page.
- The following terms are clarified or enhanced:

- ‘Current Status’ is changed to ‘Current Editorial Status’
- ‘Status Date’ is changed to ‘Editorial Status Date’
- ‘Production Status’ is expanded to show all applicable user-defined production status terms (production tracking users only)
- ‘Target Publication Date’ is changed to ‘Submission Target Publication Date’
- ‘Target Volume’ is changed to ‘Submission Target Volume’
- ‘Target Issue’ is changed to ‘Submission Target Issue’

The following new items are displayed on the *Details* page, if selected on the *Select Items to Display* page in PolicyManager:

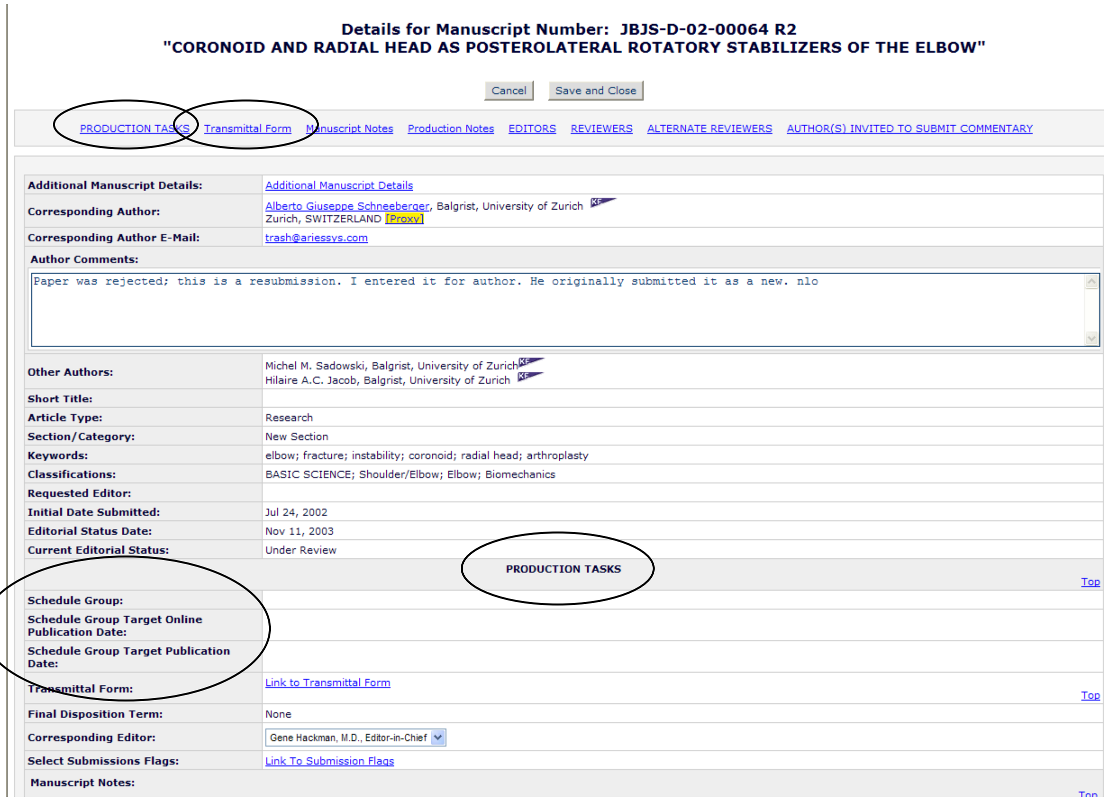
- First Author – display is just like Other Authors, with Mail To functionality (the ability to send an e-mail ‘on the fly’) and the Knowledge Finder icon to search Author information in MEDLINE.
- All Authors – same display and functionality as First Author, described above.
- Region of Origin – this item is suppressed if there is no Region of Origin currently associated with the submission.
- Suggested Reviewers - this item is suppressed if there are no Suggested Reviewers associated with the submission.
- Opposed Reviewers - this item is suppressed if there are no Opposed Reviewers associated with the submission.
- Manuscript Number - this is a new item (in version 5.0 this was only displayed in the page title area).
- DOI
- Custom Submission Flags - displays all currently selected submission flags on the main *Details* page. This item is suppressed if there are no flags associated with the submission or if the user does not have permission to ‘View Submission Flags’.
- Additional Manuscript Details – displayed if configured on the *Edit Additional Manuscript Detail Field* page in PolicyManager.
- Latest Revision Number – if no revisions have been submitted, the text “No revisions have been received” is displayed; otherwise, the appropriate revision number is displayed.
- Date Latest Revision Submitted - this is suppressed if there are no revisions.
- Final Decision Date
- Final Disposition Date

- The following items are displayed for production tracking users only, according to relevant RoleManager permissions:
  - Corresponding Production Editor
  - Date Entered Production
  - Date Production Completed
  - Production Tasks
  - Schedule Group
  - Schedule Group Target Online Publication Date
  - Schedule Group Target Publication Date
  - Schedule Group Target Volume
  - Schedule Group Target Issue
  - Position in Schedule Group Contents
  - Target Number of Pages
  - Target Start Page
  - Target End Page
  - Black and White Image Count
  - Color Image Count

In the sample Editorial Details Layout below, the Administrator copied the existing (5.0) Editorial Layout, and made the following changes:

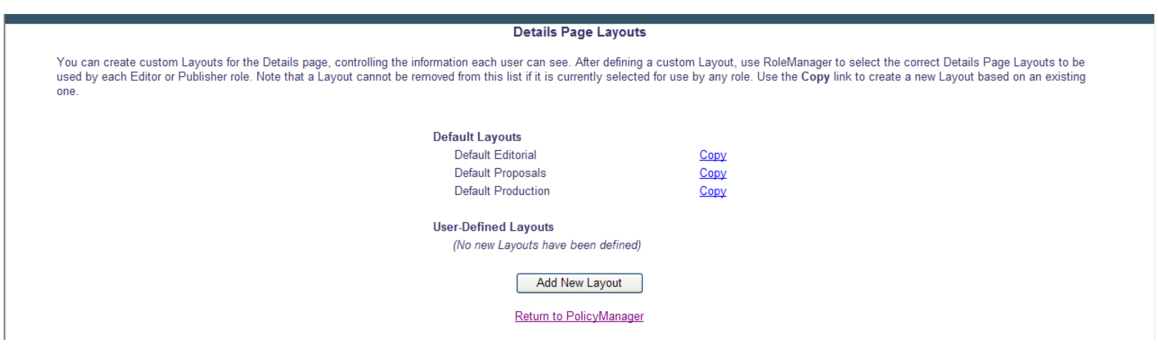
1. Created an anchor link to Transmittal Form.
2. Created a 'Production Tasks' heading and added three Schedule Group fields.
3. Removed 'Section/Category' and 'Requested Editor'.

Note this is just a sample; the Administrator can completely customize the Details Layouts.



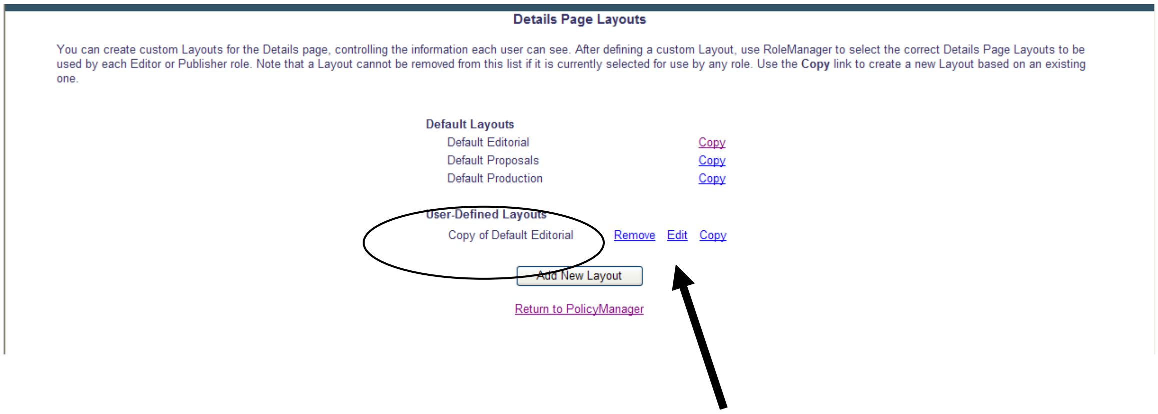
TO CONFIGURE: To customize the Details page layouts, click the Define Details Page Layouts link in the General Policies section of PolicyManager. When a site upgrades to version 6.0, three default layouts are already in place; these layouts represent the 'library' of existing page layouts in the system. The easiest way to create a new layout is to Copy an existing layout, and make changes to an already established layout.

However, you can also start 'from scratch' by clicking the 'Add New Layout' button.



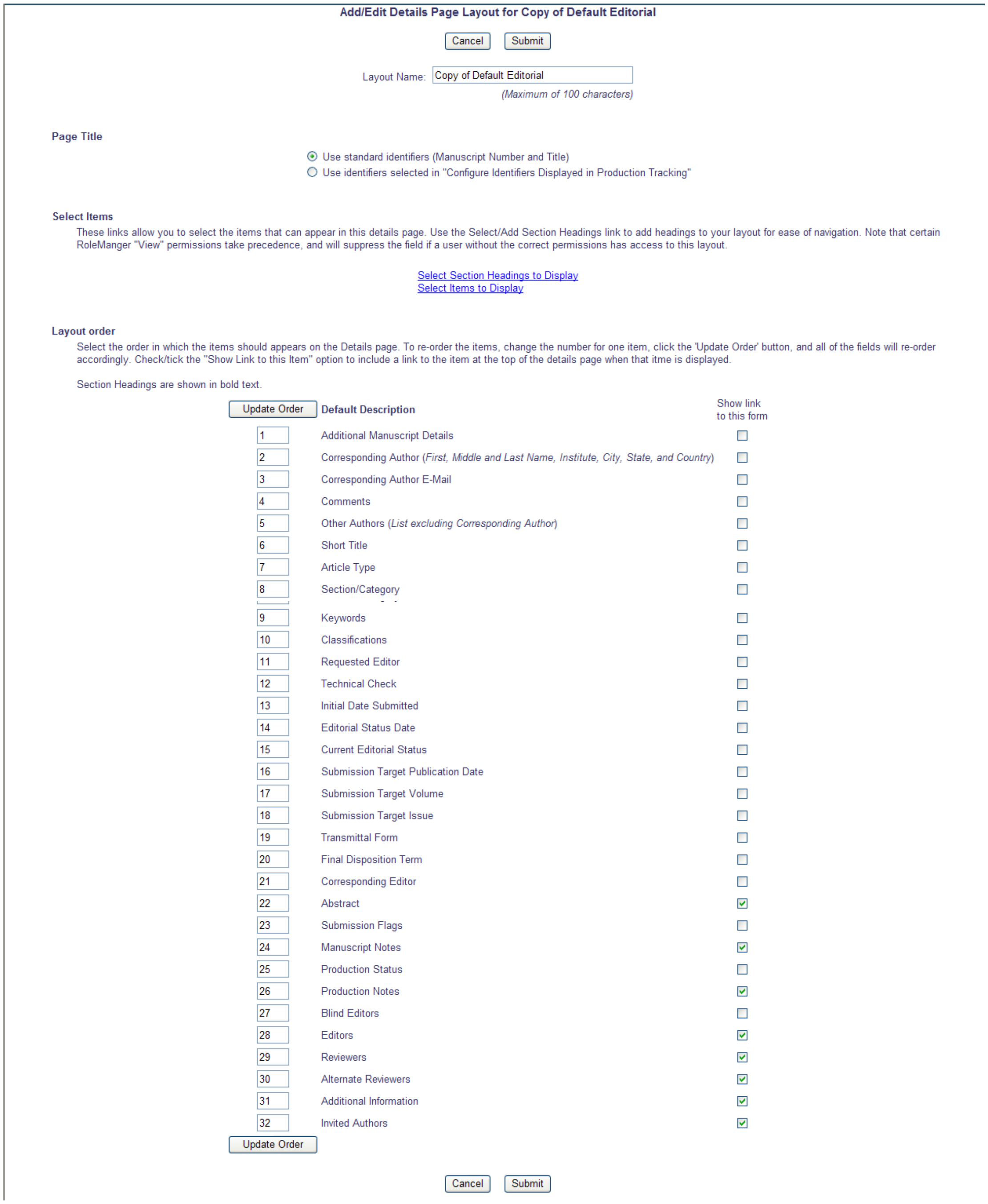
NOTE: The Default Production layout is displayed for production tracking users only.

If you click the Copy link, a copy of the *Details* page layout is created. Then click the Edit link to modify the layout.



The mockup below shows what the page looks like if you Copy a Default layout, and click the <u>Edit</u> link.

If the 'Show Link to this Item' box is checked, there will be an anchor link to that item on the *Details* page.


Add/Edit Details Page Layout for Copy of Default Editorial

Cancel Submit

Layout Name: Copy of Default Editorial
(Maximum of 100 characters)

Page Title

(•) Use standard identifiers (Manuscript Number and Title)
( ) Use identifiers selected in "Configure Identifiers Displayed in Production Tracking"

Select Items

These links allow you to select the items that can appear in this details page. Use the Select/Add Section Headings link to add headings to your layout for ease of navigation. Note that certain RoleManger "View" permissions take precedence, and will suppress the field if a user without the correct permissions has access to this layout.

Select Section Headings to Display
Select Items to Display

Layout order

Select the order in which the items should appears on the Details page. To re-order the items, change the number for one item, click the 'Update Order' button, and all of the fields will re-order accordingly. Check/tick the "Show Link to this Item" option to include a link to the item at the top of the details page when that itme is displayed.

Section Headings are shown in bold text.

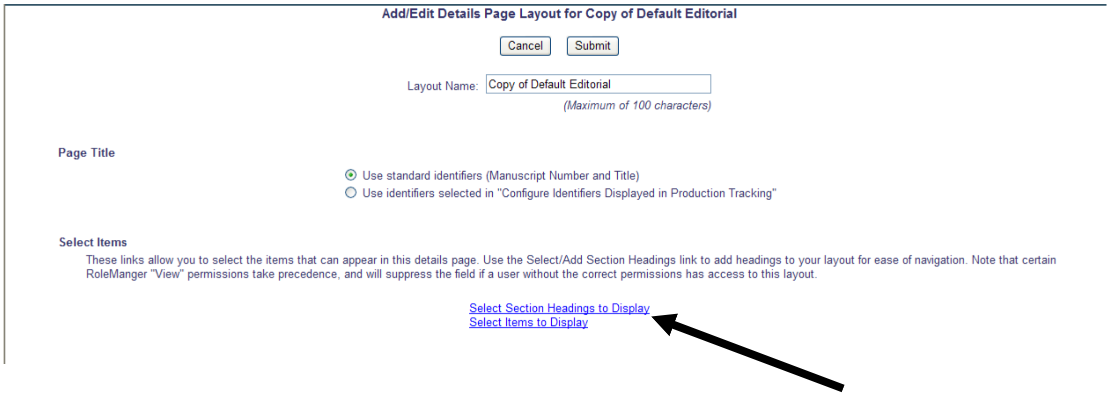
Update Order	**Default Description**	Show link to this form
1	Additional Manuscript Details	☐
2	Corresponding Author (*First, Middle and Last Name, Institute, City, State, and Country*)	☐
3	Corresponding Author E-Mail	☐
4	Comments	☐
5	Other Authors (*List excluding Corresponding Author*)	☐
6	Short Title	☐
7	Article Type	☐
8	Section/Category	☐
9	Keywords	☐
10	Classifications	☐
11	Requested Editor	☐
12	Technical Check	☐
13	Initial Date Submitted	☐
14	Editorial Status Date	☐
15	Current Editorial Status	☐
16	Submission Target Publication Date	☐
17	Submission Target Volume	☐
18	Submission Target Issue	☐
19	Transmittal Form	☐
20	Final Disposition Term	☐
21	Corresponding Editor	☐
22	Abstract	☑
23	Submission Flags	☐
24	Manuscript Notes	☑
25	Production Status	☐
26	Production Notes	☑
27	Blind Editors	☐
28	Editors	☑
29	Reviewers	☑
30	Alternate Reviewers	☑
31	Additional Information	☑
32	Invited Authors	☑

Update Order

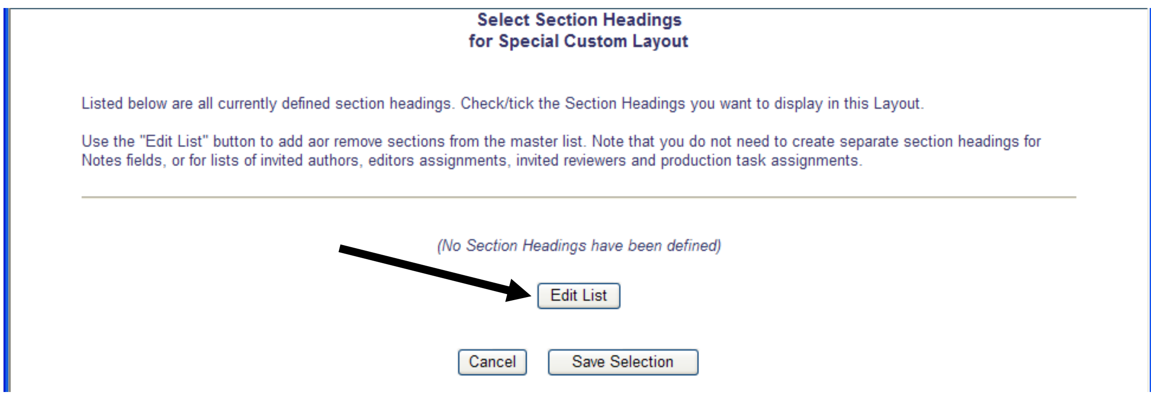
Cancel Submit

The Page Title section is displayed for Production Tracking users only. For non-Production Tracking uses, the standard identifiers are used.

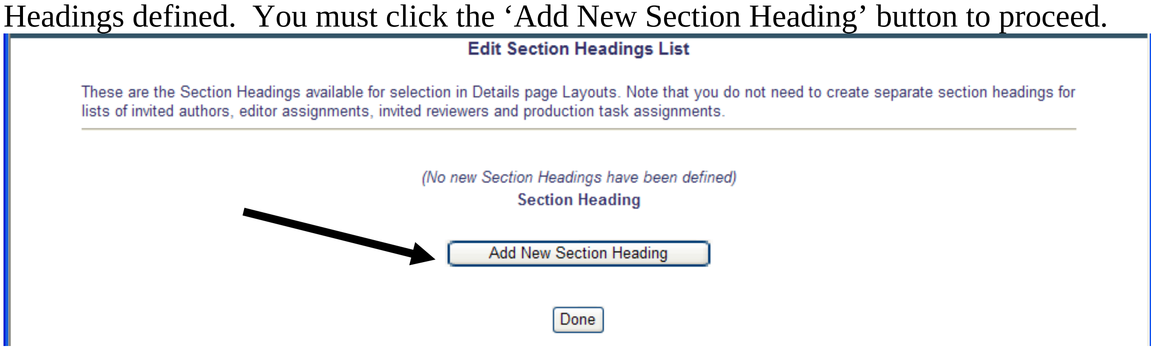
Click the Select Section Headings to Display link. Section Headings simply insert a text label, formatted as a heading across the *Details* page, and are used as layout and navigation aids; they are not linked to any particular field.



The first time you arrive at the *Select Section Headings* page, there are no Section Headings defined. To define your Section Headings, click the 'Edit List' button.

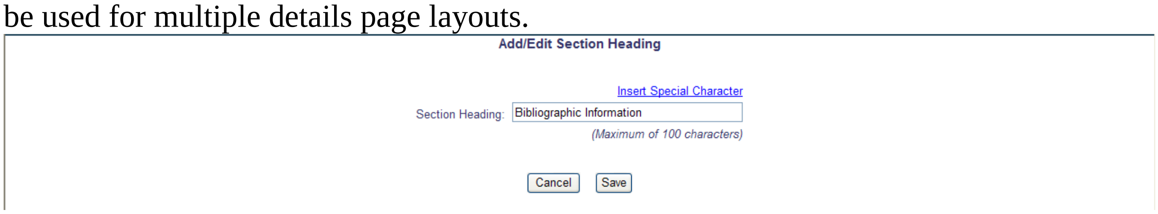


The first time you arrive at the *Edit Section Headings List* page, there are no Section Headings defined. You must click the 'Add New Section Heading' button to proceed.

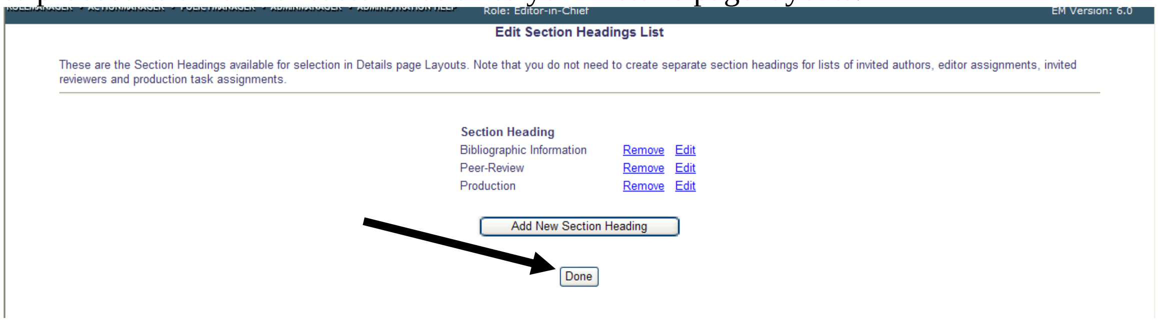


Type the name(s) of the Section Headings you want to use in the *Details* page layouts.

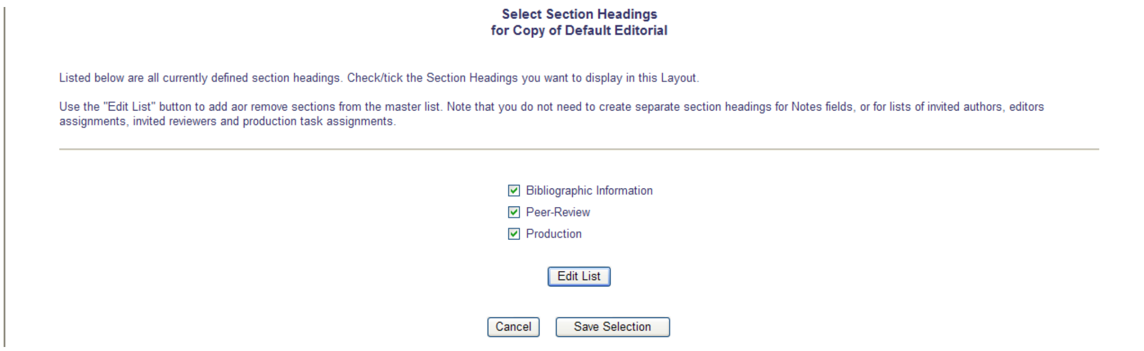
NOTE: This is a 'master list' of Section Headings; the Section Headings defined here can be used for multiple details page layouts.



Click the ‘Done’ button when you have entered all your Section Headings and are ready to proceed with further customization to your *Details* page layouts.

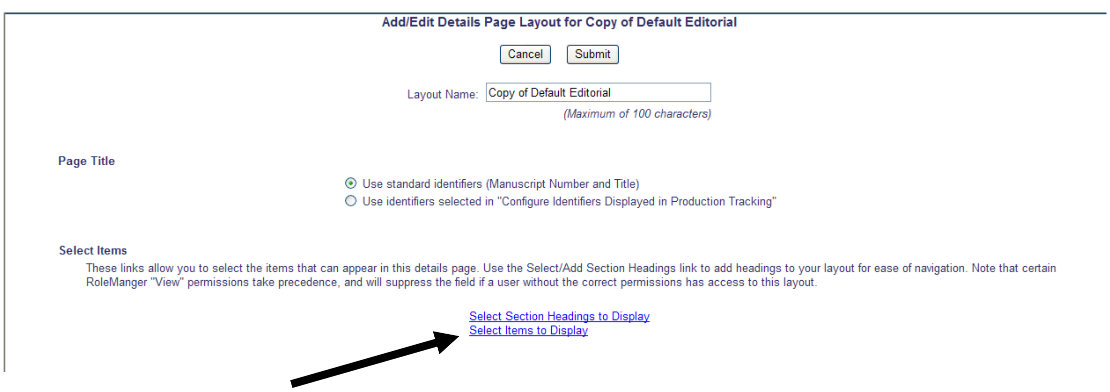


From the master list of Section Headings, you must then select the ones you want displayed in this particular *Details* page layout, and click the ‘Save Selection’ button.



NOTE: When you click ‘Save Selection’, the new headings are added to the end of the list in the Item Order on the *Add/Edit Details Page Layout* page.

The next step is to click the Select Items to Display link, so you can select the items that will appear in the main *Add/Edit Details Page Layout* page (with the exception of Section Headings, which were defined previously).



The *Select Items to Display* page lists all the possible items that can be displayed on the *Details* page. The categories can be expanded or collapsed by clicking the appropriate Expand All/Collapse All links. Once you have selected all the items you want to display on the *Details* page, click the ‘Submit’ button.

NOTE: If you copy one of the default layouts (editorial, proposal or production), the items selected reflect the existing layout when the site initially upgrades to version 6.0.

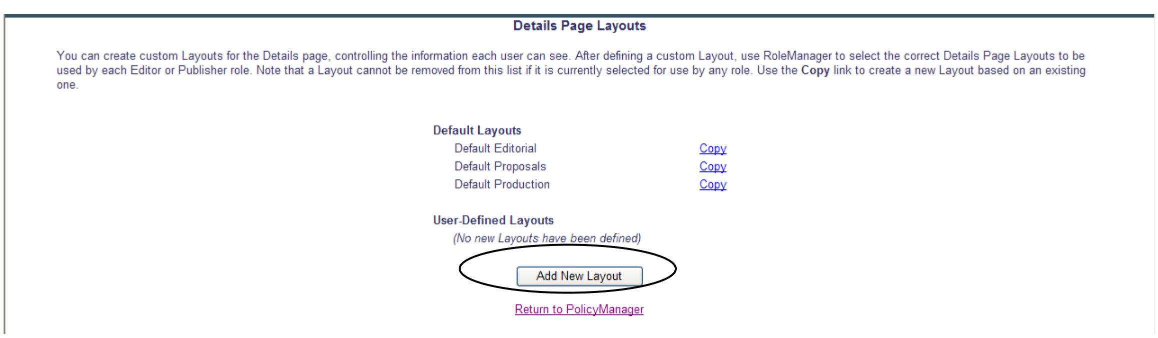
NOTE: If an item is marked with an asterisk (*), the item is also subject to RoleManager permissions and/or PolicyManager settings.

NOTE: Items specific to production tracking are only displayed for journals using production tracking functionality.

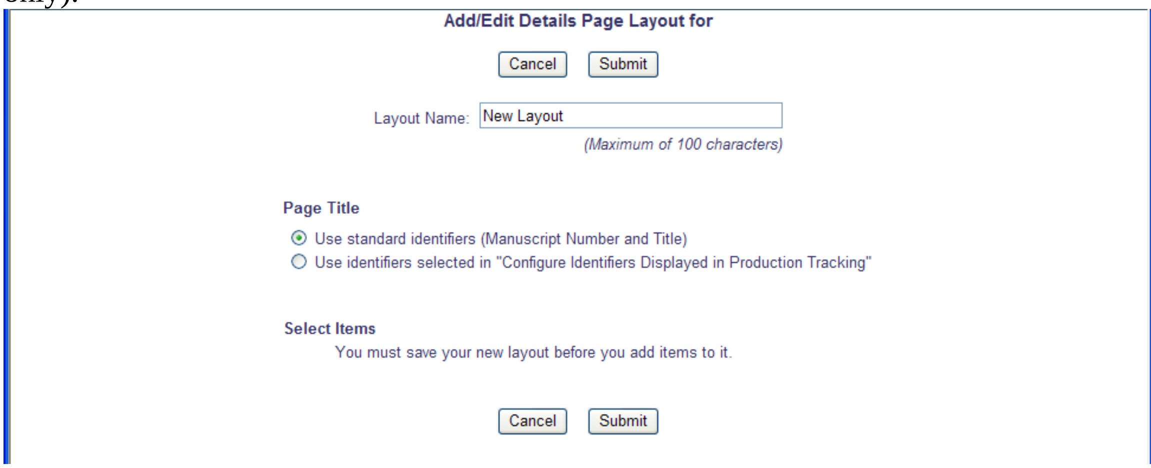
Once you have selected all the items to display, you are returned to the *Add/Edit Details Page Layout* page, where you can modify the order in which the items are displayed.

NOTE: Any newly selected items or section headings are automatically added to the end of the list.

You may also click the ‘Add New Layout’ button to create a new layout ‘from scratch’.

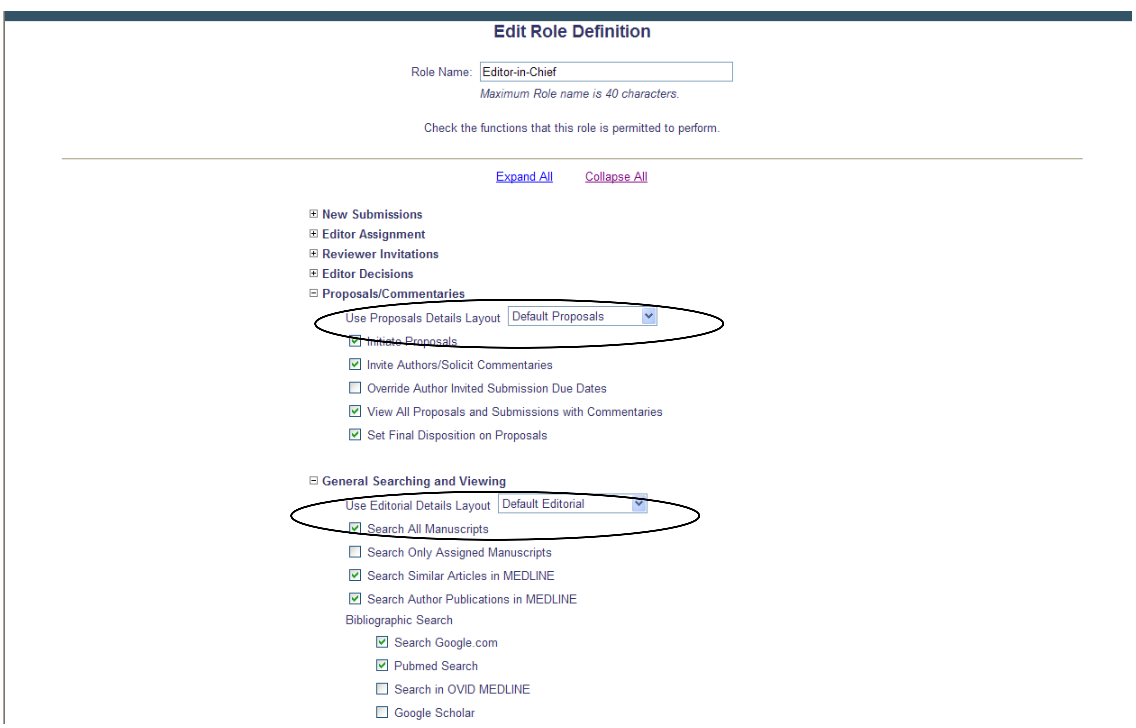


Enter the Layout Name, and select the format of the Page Title (production tracking users only).

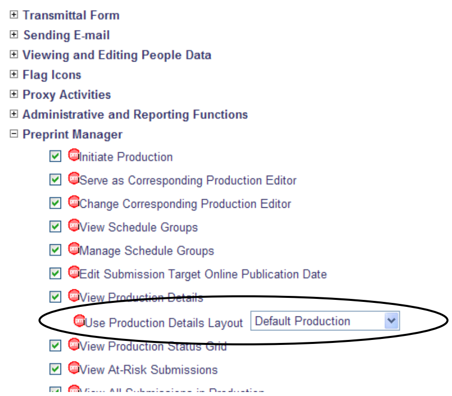


Click the ‘Submit’ button to save your layout and proceed with the configuration, as described above.

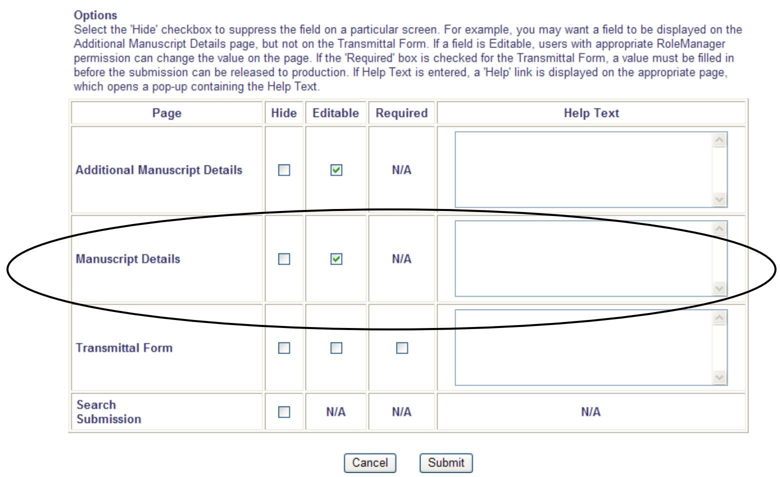
Once you have created/customized your *Details* page layouts, you must grant RoleManager permissions to use these layouts. When a site is upgraded to version 6.0, Editor and Publisher roles will automatically have permission to use the default *Details* page layouts.



For Production Tracking users only, there is also a RoleManager permission for the *Production Details* layout.



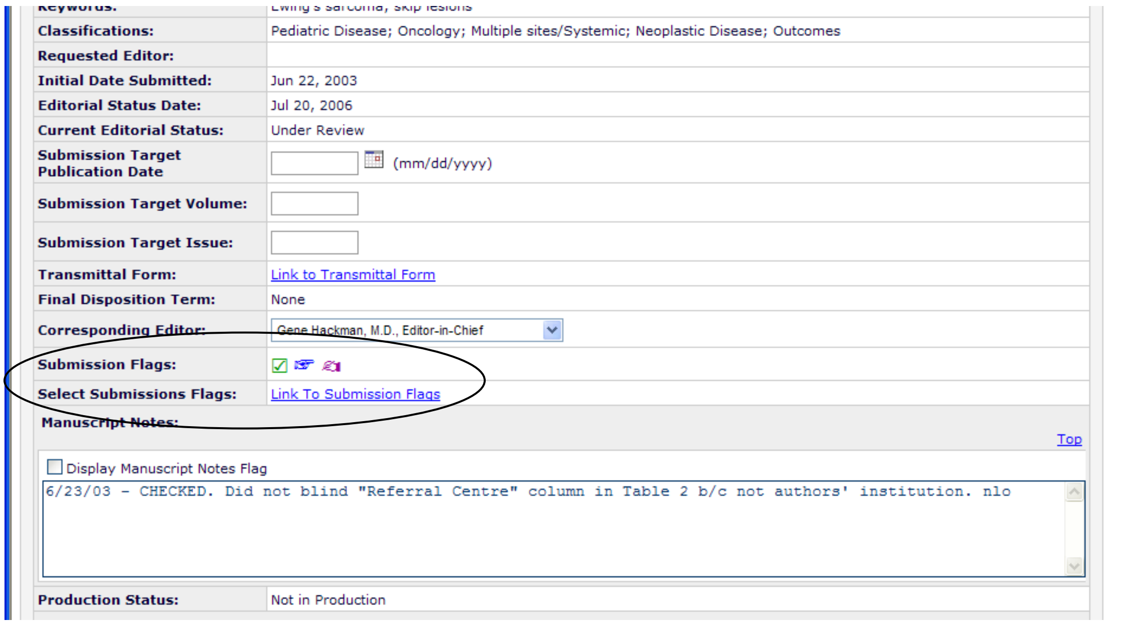
In version 5.0, Additional Manuscript Details Fields are accessible via a button on the *Details* page. In version 6.0, these fields are now accessible via a link (to be consistent with other items) on the *Details* page, if specified on the *Edit Additional Manuscript Detail Field* page in PolicyManager.



Improved Display of Custom Submission Flags

In version 5.0, custom submission flags are not displayed on the *Details* pages; a <u>Link to Submission Flags</u> link on the *Details* page navigates the user to a secondary pop-up that displays the flag(s) associated with the submission.

In version 6.0, the flags are now displayed directly on the *Details* page, providing immediate visibility for the flags associated with a particular submission. The user continues to click <u>Link to Submission Flags</u> to turn flags on/off.

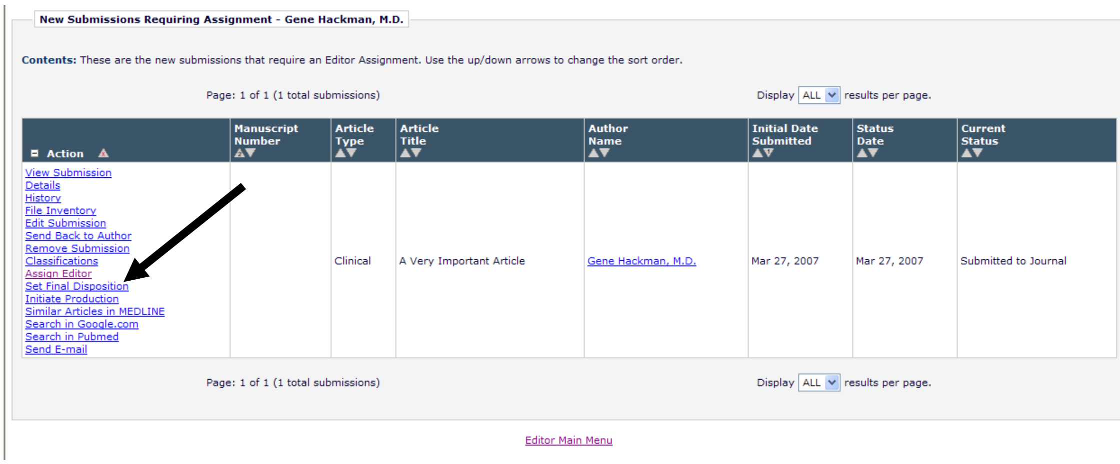


NOTE: Submission flags are suppressed on the *Details* page if there are no submission flags associated with the submission, if the current user's role does not have permission to 'View Submission Flags', or if the Administrator changes the *Details* page layout in PolicyManager, specifying that Submission Flags are not displayed.

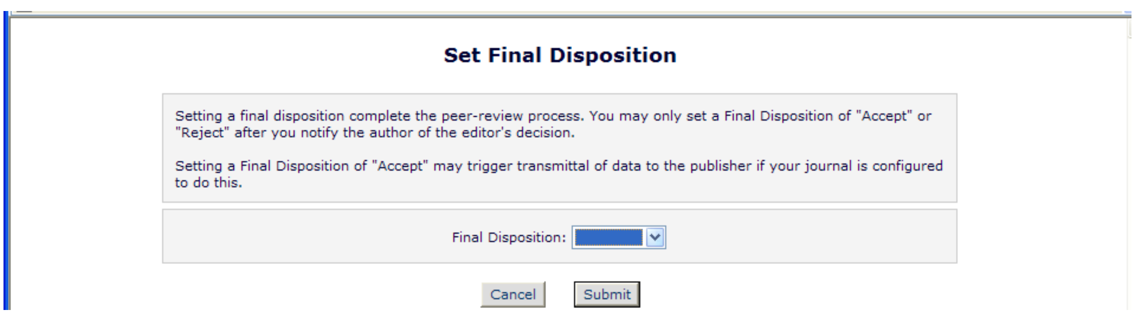
TO CONFIGURE: No configuration is necessary.

'Set Final Disposition' is an Action Link

The existing 'Set Final Disposition' functionality is moved from the *Details* page to the 'Action' link column in the main folders. This allows the *Details* page to be used only to view and edit data, not to progress manuscripts through the workflow. The 'Set Final Disposition' step is used to complete the editorial workflow of a submission.



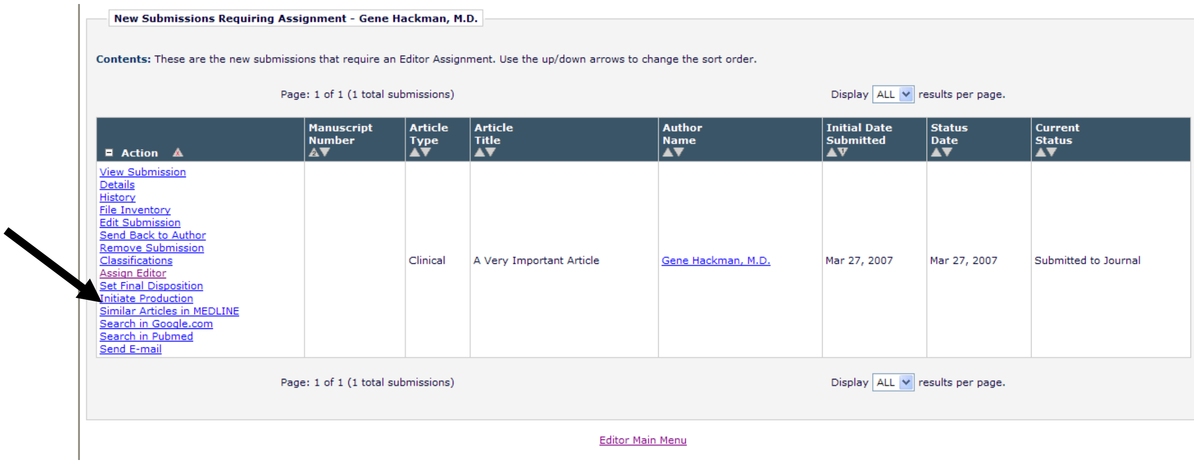
Clicking the Set Final Disposition link takes the user to a new pop-up window where the final disposition can be set.



NOTE: The page layout for conference submissions and proposals display text and final disposition terms pertaining to conference submissions and proposals, respectively.

‘Initiate Production’ is an Action Link

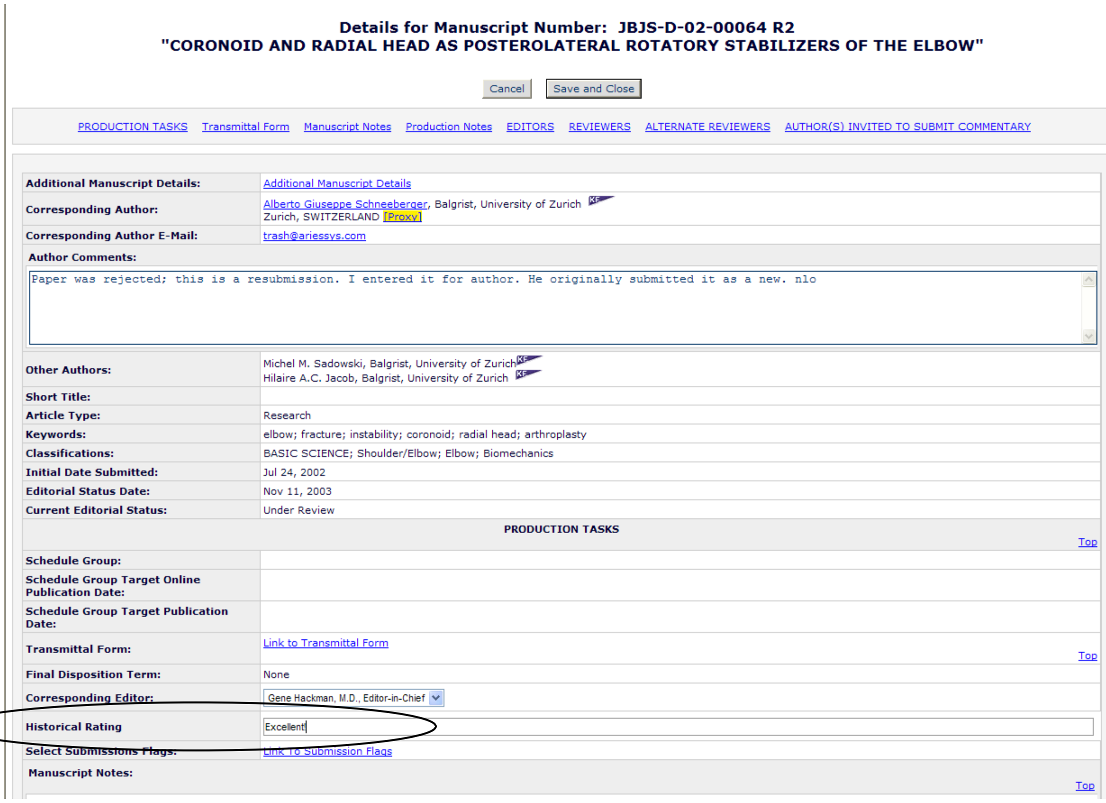
The ‘Initiate Production’ functionality (production tracking users only) is moved from the *Details* page to the ‘Action’ link column in the main folders. This allows the *Details* page to be used only to view and edit data, not to progress manuscripts through the workflow. ‘Initiate Production’ is used to move a submission from the editorial workflow, into a production workflow. Note that an editorial workflow and a production workflow can overlap.



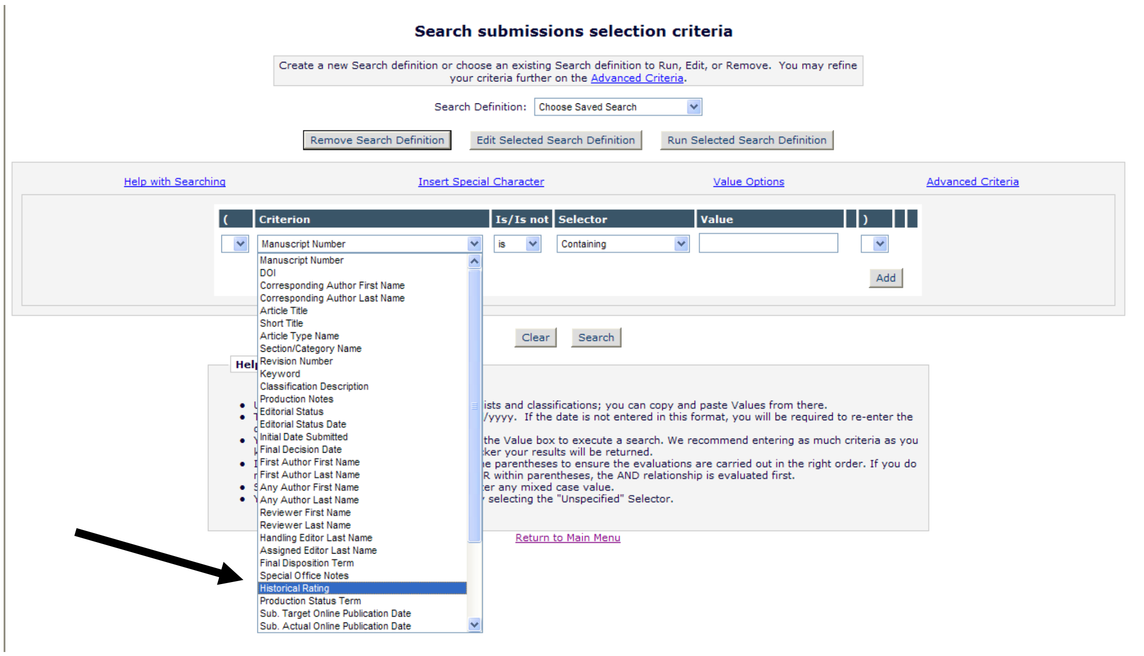
Clicking the Initiate Production link takes the user to the existing *Initiate Production and Assign Production Task* page.

Enhanced Functionality for Additional Manuscript Details

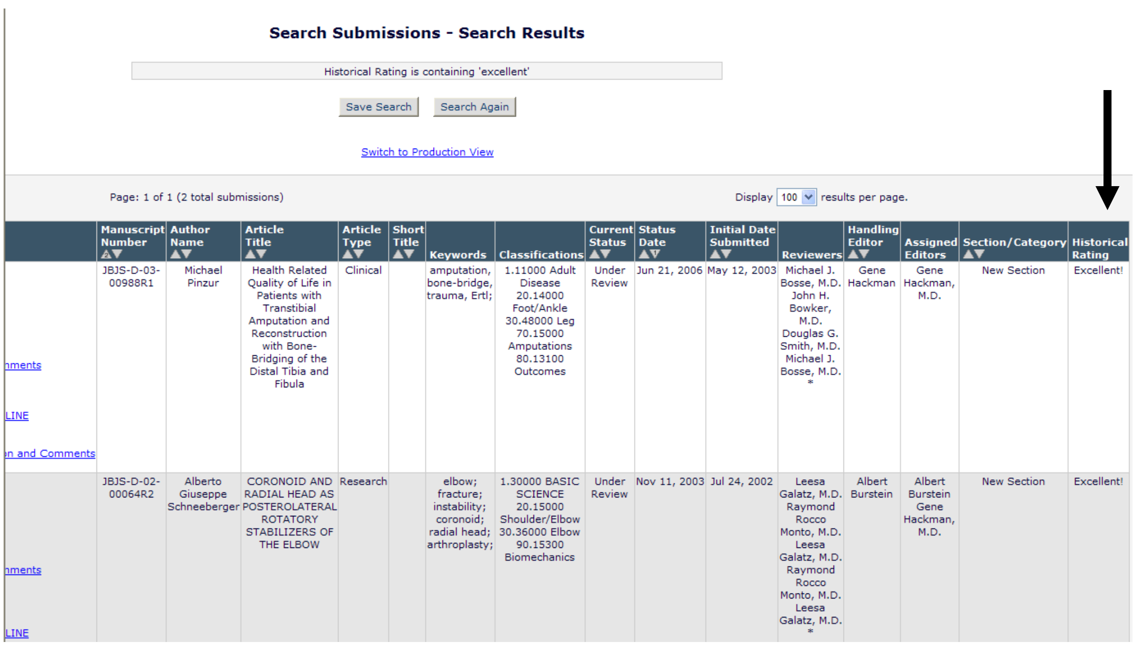
Additional Manuscript Detail Fields are customized fields created by an Administrator to capture additional information for submissions. In version 5.0, Additional Manuscript Detail Fields are accessible via a button on the *Details* page. In version 6.0, these fields are now accessible via a link (to be consistent with other items) on the *Details* page, if specified on the *Edit Additional Manuscript Detail Field* page in PolicyManager. The fields can also be displayed directly on the *Details* page, if specified by the Administrator in the *Details* page layout.



The Additional Manuscript Detail Fields can also be displayed as search criterion in the *Search Submissions* interface.

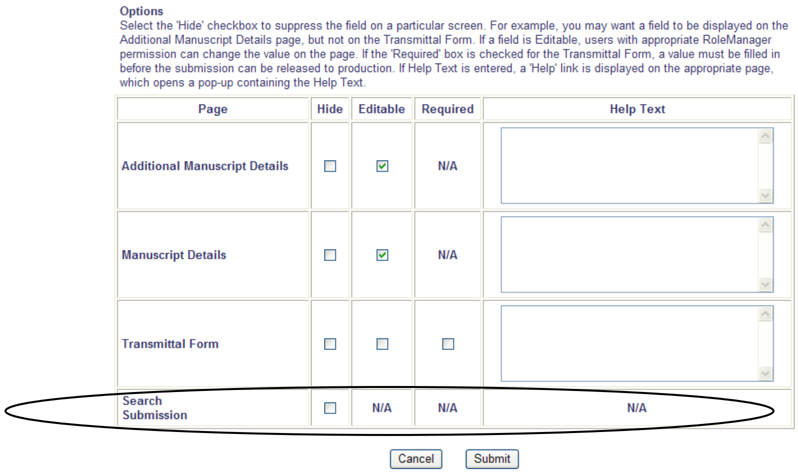


If a particular Additional Manuscript Detail Field is used in the search query, that field will also be included on the *Search Results* page.



NOTE: Additional Manuscript Detail Fields are only displayed in the results if they are also used in the query.

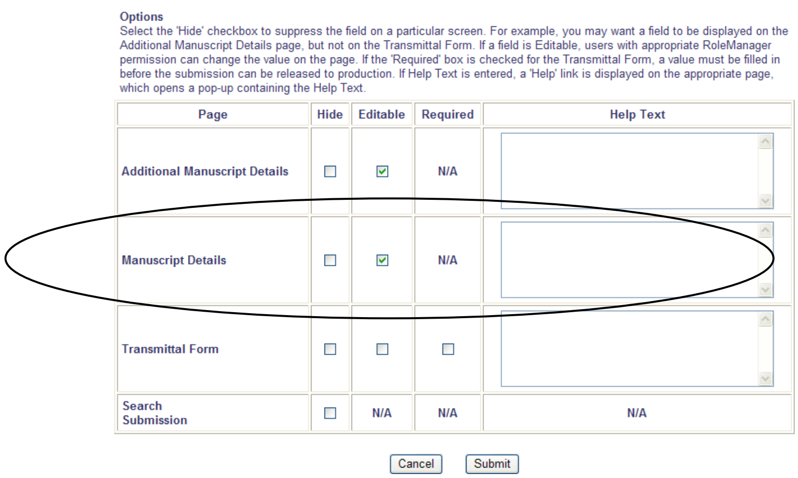
TO CONFIGURE: To add an Additional Manuscript Detail field to the *Search Submissions* interface, click the Add/Edit Additional Manuscript Detail Fields link in the Additional Data Policies section of PolicyManager. Then click Edit to modify an existing Additional Manuscript Detail field, or click the ‘Add’ button to create a new field. To display the field in the *Search Submissions* interface, make sure the ‘Hide’ box is not checked.


Options
Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	☐	☑	N/A	
Manuscript Details	☐	☑	N/A	
Transmittal Form	☐	☐	☐	
Search Submission	☐	N/A	N/A	N/A

Cancel Submit

To display the field on the Manuscript Details page, make sure the ‘Hide box is not checked on the *Add/Edit Additional Manuscript Detail Fields* page.


Options
Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	☐	☑	N/A	
Manuscript Details	☐	☑	N/A	
Transmittal Form	☐	☐	☐	
Search Submission	☐	N/A	N/A	N/A

Cancel Submit

Then click the Define Details Page Layouts link in the PolicyManager Menu, and click the Edit link for the layout you want to modify. Click the Select Items to Display link and make sure the Additional Manuscript Details Field is selected.

Select Items to Display for

Select the information to appear on the Details page

* Items marked with an asterisk are subject to additional permissions, which may mean that some users will not be able to view them until you give them the additional permission to do so in RoleManager.

Expand All   Collapse All

⊞ **Links**
⊞ **Information Submitted by Author**
⊞ **General Manuscript Information**
⊞ **Proposal Specific Information**
⊟ **Additional Manuscript Details**
- ☑ New Manuscript Field
- ☑ Special Office Notes

⊞ **Key Workflow Dates and Status Information**
⊞ **Assignments and Invitations**
⊞ **Publishing and Production Information**

Expand All   Collapse All

Cancel   Submit

Production Notes Box Expansion

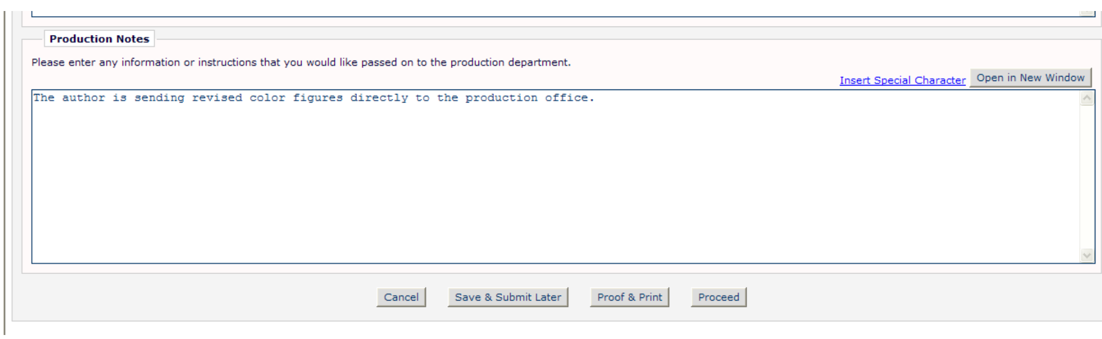
In EM version 5.0, Production Notes is a text area field displayed on the *Manuscript Details* and the *Production Details* pages. This field is controlled by two Editor and Publisher RoleManager permissions: 'View Production Notes on Manuscript Details' and 'Edit Production Notes on Manuscript Details'.

Note this field can be used by both EM and PM publications.

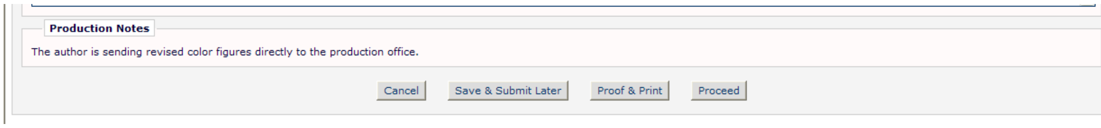
The Production Notes feature is enhanced as follows in version 6.0:

- Editor RoleManager and Publisher RoleManager permissions are renamed 'View Production Notes' and 'Edit Production Notes', because the Production Notes field is now available on pages other than *Manuscript Details* and *Production Details*.
- Production Notes now support custom instructions (for Editors with 'Edit Production Notes' permission).
- Production Notes is added to the *Submit Editor's Decision and Comments* page and the *Notify Author* page (for Editors with 'View Production Notes' or 'Edit Production Notes' permission).
- Production Notes Instructions are added to the *Manuscript Details* and *Production Details* pages (for Editors with 'Edit Production Notes' permission).
- Production Notes is added to the *Select Manuscript Metadata Fields* page (in PolicyManager), for inclusion on the Transmittal Form.

If an Editor has the 'Edit Production Notes' permission enabled, the editable Production Notes text box and instructions are now displayed at the bottom of the *Submit Editor's Decision and Comments* page.

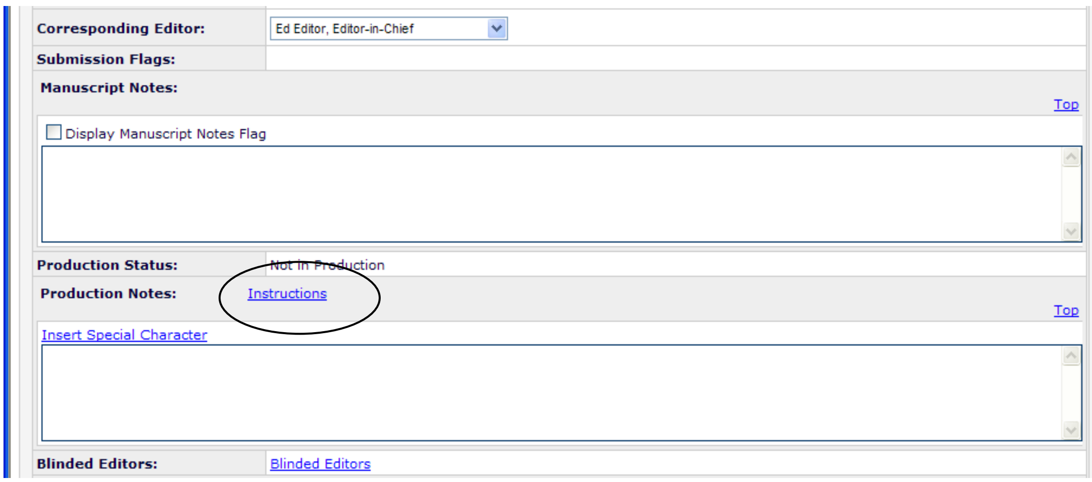


If the Editor has the 'View Production Notes' permission (but not 'Edit Production Notes' permission) enabled, the instructions are suppressed and the user sees un-editable Production Notes.

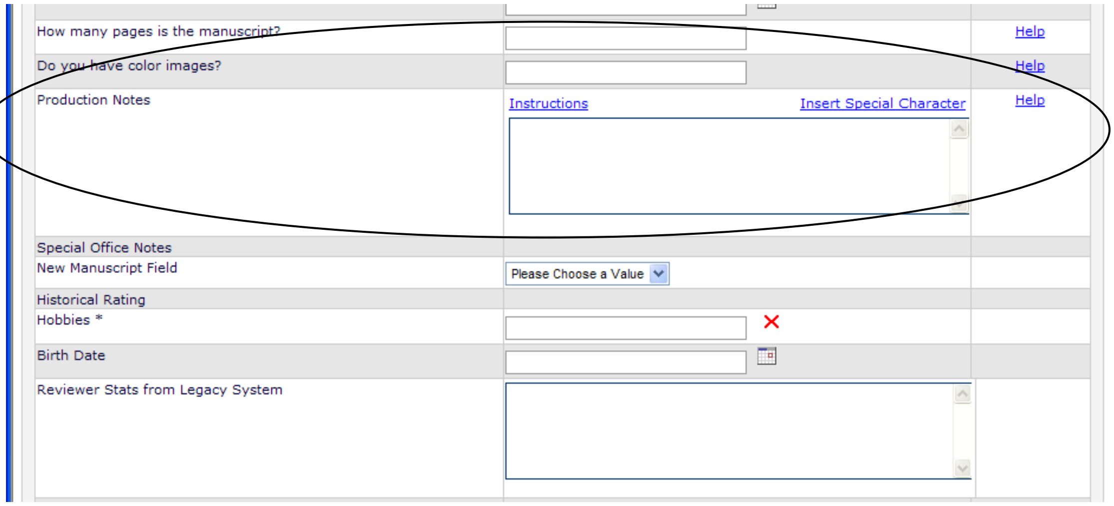


Production Notes are carried through to the *Notify Author* page. Just like the *Submit Editor's Decision and Comments* page, the Editor has read-only or editable access, depending on their RoleManager permission.

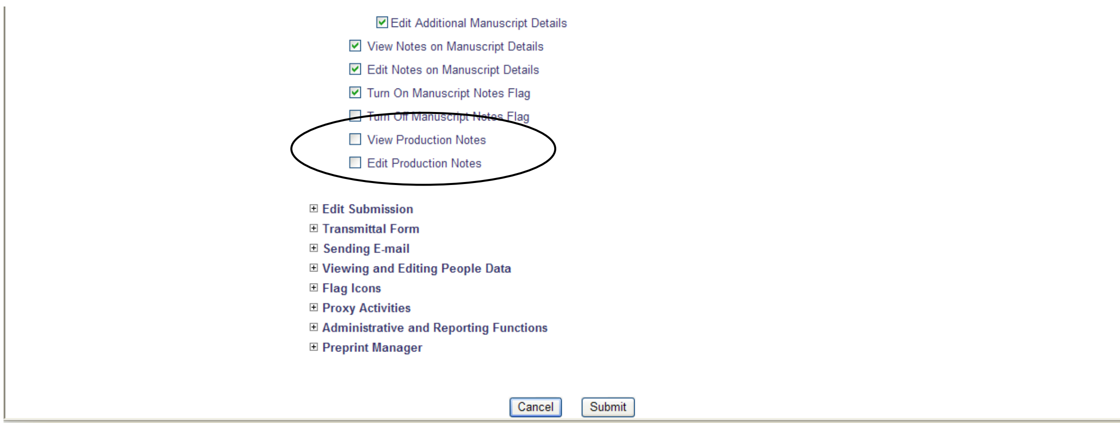
In version 5.0, Production Notes are displayed on the *Manuscript Details* and *Production Details* pages. In version 6.0, the custom instructions are added to these pages, as long as the Editor has 'Edit Production Notes' permission. Note the instructions are accessible by clicking the Instructions link.



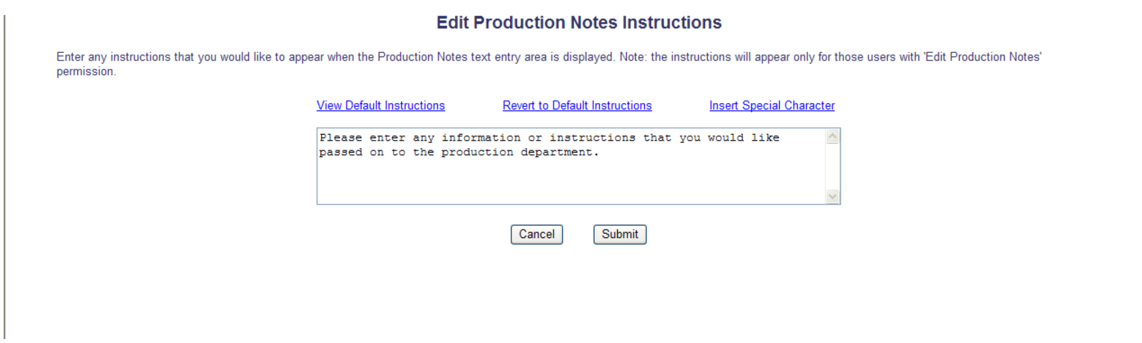
Production Notes can also be displayed on the *Transmittal Form* if the field has been selected on the *Select Manuscript Metadata Fields* page in PolicyManager, and if the user has RoleManager permission to 'View Production Notes' or 'Edit Production Notes'. As described previously, the Editor has read-only or editable access depending on their RoleManager permissions. On the *Transmittal Form*, the instructions (if any) are accessible by clicking the Instructions link.



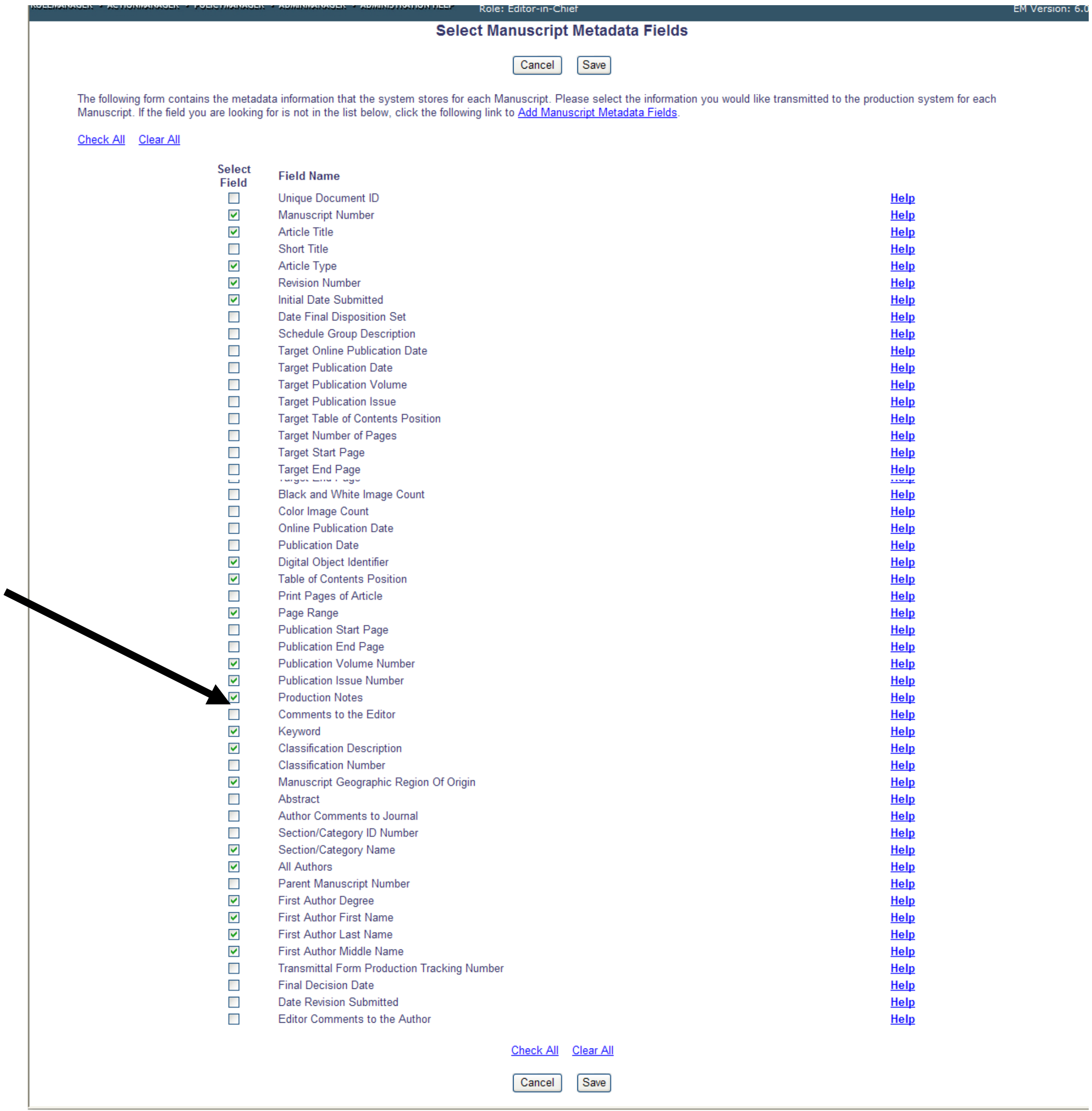
TO CONFIGURE: Select the appropriate permissions in Editor RoleManager or Publisher RoleManager.



To customize the Production Notes instructions, click the Edit Production Notes Instructions link in the General Policies section of PolicyManager. Then enter the instructions you would like users to see. The default instructions are shown below, and can be reverted back to at any time.



To include Production Notes on the Transmittal Form, you must select 'Production Notes' on the *Select Manuscript Metadata Fields* page in the Transmittal Policies section of PolicyManager.

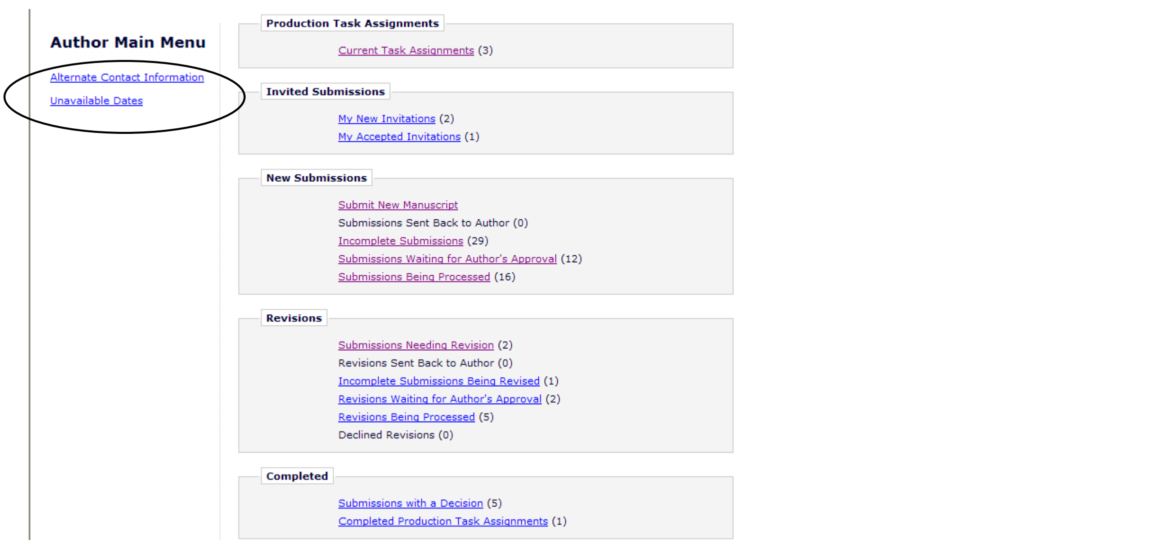


Improved Visibility for Alternate Contact Information

For many publications, the *Alternate Contact Information* and *Unavailable Dates* pages are used to inform the Editorial Office about sabbaticals, vacations, etc. For weekly publications, the accuracy and currency of this information is critical, as it facilitates quick turnaround of production tasks. It also allows a user to monitor and complete another user's production tasks, further ensuring that all tasks are completed by the target publication date.

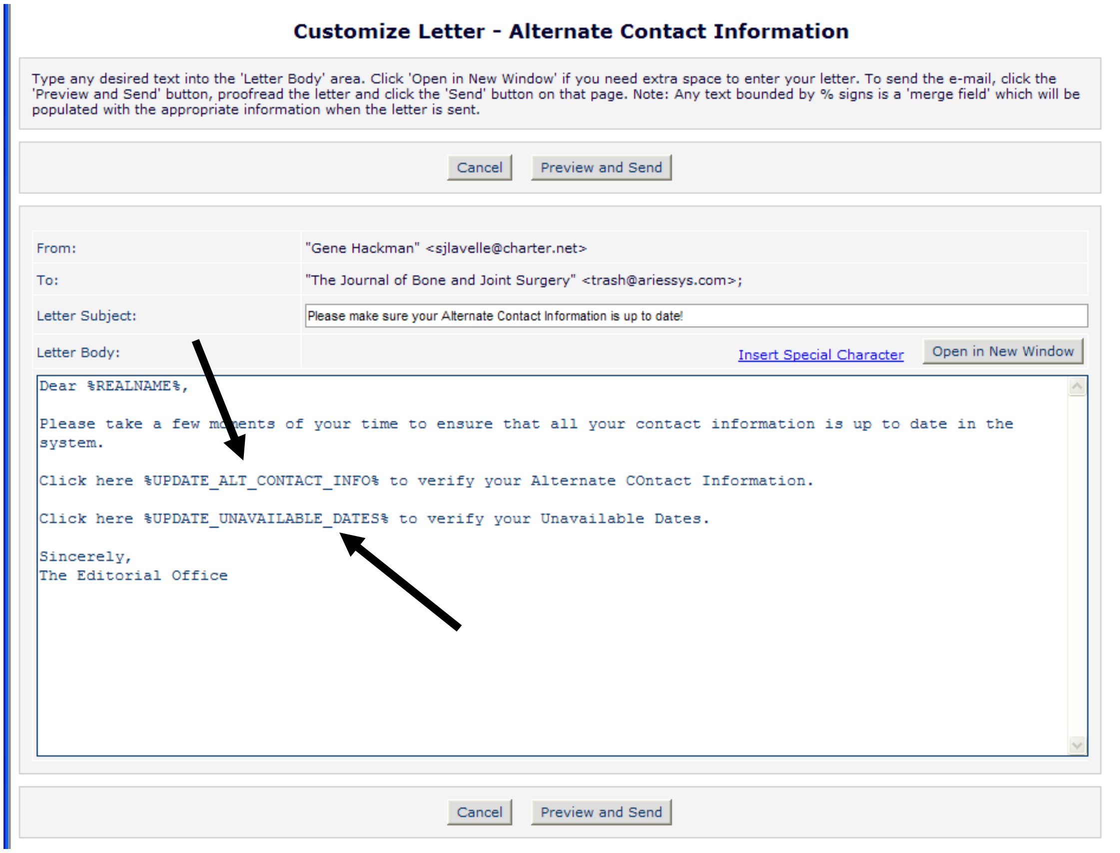
In version 5.0, *Alternate Contact Information* and *Unavailable Dates* are accessible to Authors via the user's people record on the *Update My Information* page. In version 6.0, the links to Alternate Contact Information and Unavailable Dates can be displayed prominently on the *Author Main Menu*.

Administrators can provide Authors with easy access to the *Alternate Contact Information* and *Unavailable Dates* areas of the system by enabling two new Author RoleManager permissions.



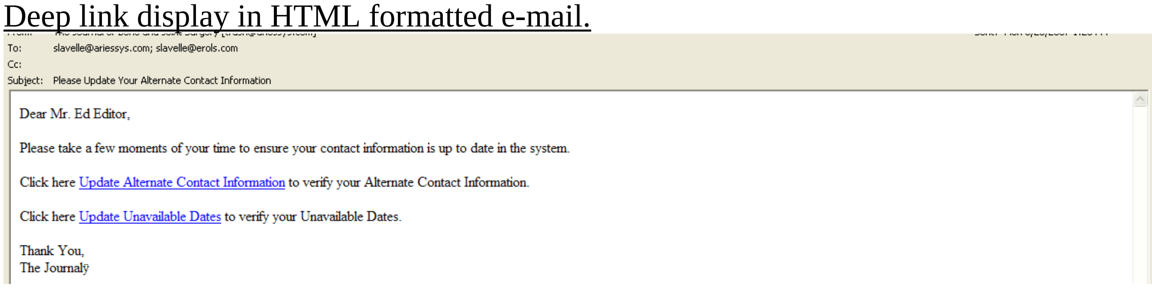
Two new deep link mail-merge fields can be included in system letters in an effort to encourage users to keep their Alternate Contact Information and Unavailability Dates current. When a deep link mail-merge field is included in the letter template, a URL is inserted into the e-mail correspondence sent to the user. Clicking on the URL automatically logs the recipient into the system and brings him to the correct page (*Alternate Contact Information* or *Unavailable Dates*).

Administrators can type the new %UPDATE_ALT_CONTACT_INFO% and %UPDATE_UNAVAILABLE_DATES% mail-merge fields into letter templates or directly into the letter.

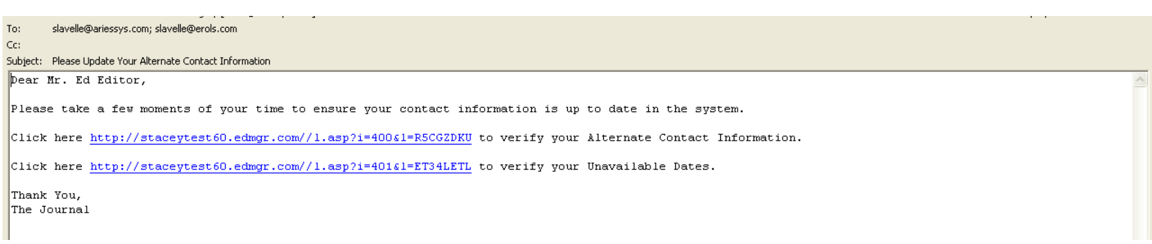


When the letter is sent, the deep link merge field inserts a URL that the user can click on, or copy and paste into a browser. The URL navigates the Author to the correct page, where he can validate the information.

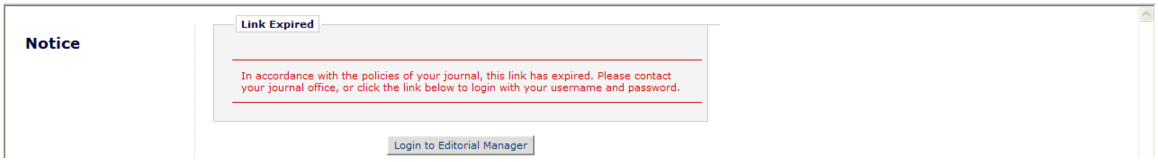
<u>Deep link display in HTML formatted e-mail.</u>



<u>Deep link display in Text formatted e-mail.</u>



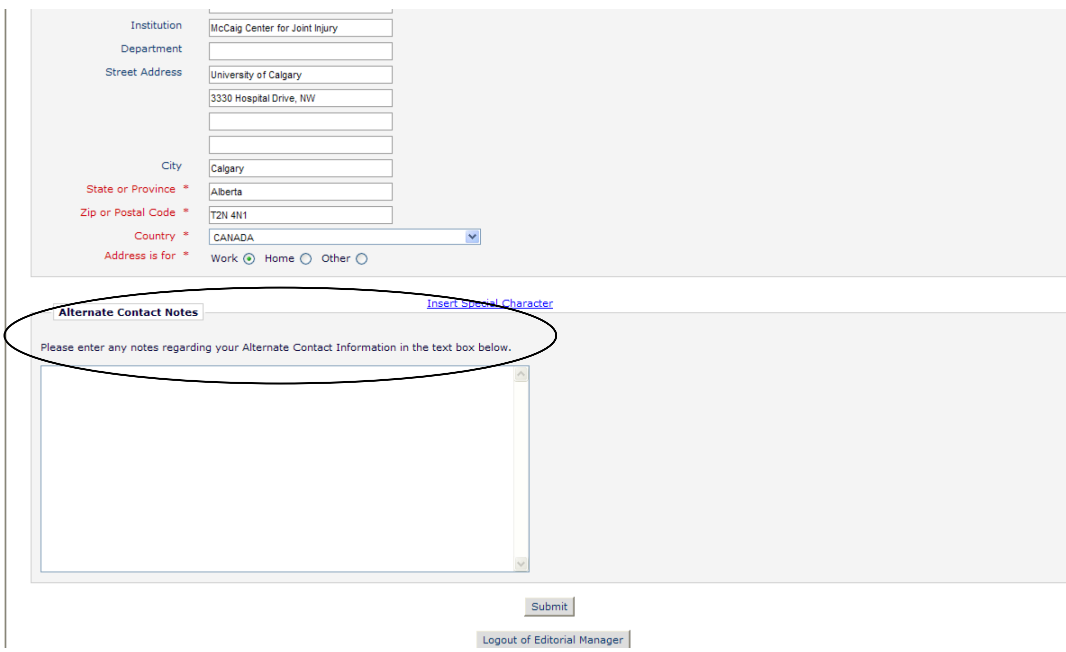
The URL expires according to the publication's policy after a default number of clicks and/or a default number of days.



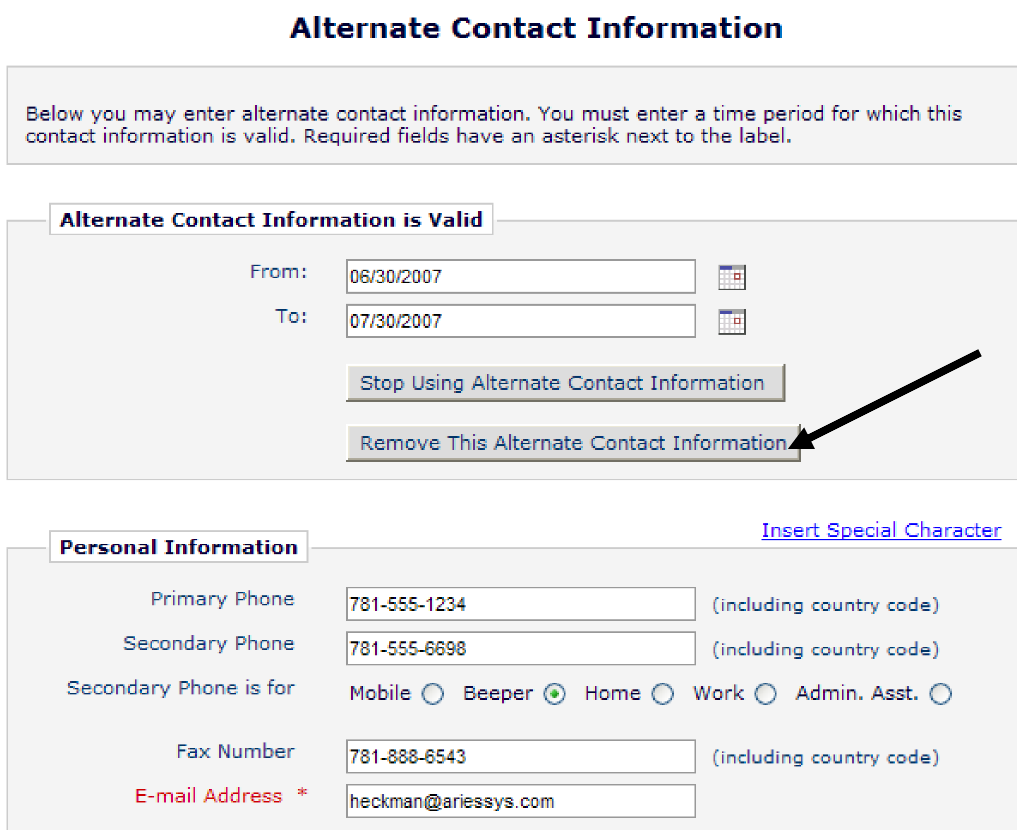
The *Alternate Contact Information* page can be accessed in one of the following ways:

1. Clicking the new Alternate Contact Information link on the *Author Main Menu.*
2. Clicking the Alternate Contact Information link located on the *Update My Information* page and *Search People – Update Information* pages.
3. Clicking on a deep link inserted by the %UPDATE_ALT_CONTACT_INFO% merge field within a system e-mail.

The *Alternate Contact Information* page is enhanced with an 'Alternate Contact Notes' section. Instructions for the Alternate Contact Notes field are customizable by the Administrator.

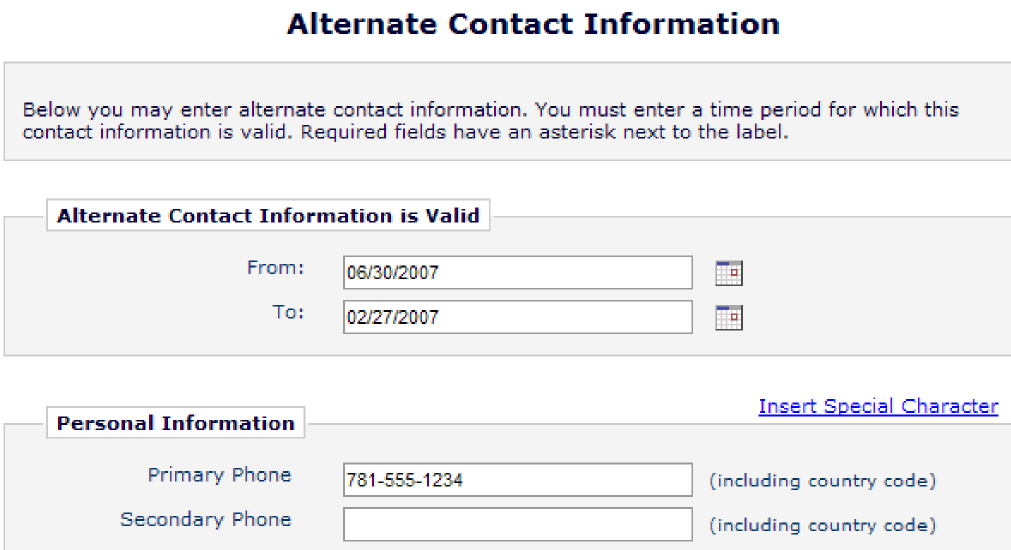


The *Alternate Contact Information* page also has a new 'Remove this Alternate Contact Information' button.

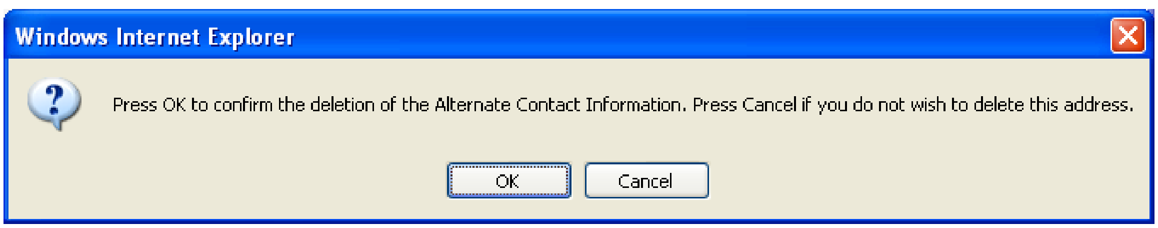


The 'Remove this Alternate Contact Information' button serves a different purpose than the existing 'Stop Using Alternate Contact Information' button:

- Clicking the 'Stop Using Alternate Contact Information' button sets the end date for the Alternate Contact Information to "today's date", but does not 'clear' the date fields or any of the other data that was previously entered. This makes it easier to set another end date in the future, without having to re-enter all the contact information. In the example below, the Alternate Contact Information was valid from 06/30/2007 to 07/30/2007, but I clicked the 'Stop Using Alternate Contact Information' button on 02/27/2007. The 'From' date and all personal information remains intact; only the 'To' date is changed to the current date.



When 'Remove Alternate Contact Information' is clicked, the user is asked to confirm his intentions.



If he clicks 'OK', the 'From' and 'To' dates (and any data previously entered for Alternate Contact Information) are 'cleared', reverting to the default values (i.e. Phone Numbers, Addresses, etc. from the 'regular' people record).

NOTE: The 'Remove this Alternate Contact Information' button is inactive if there is no Alternate Contact Information record for the person.

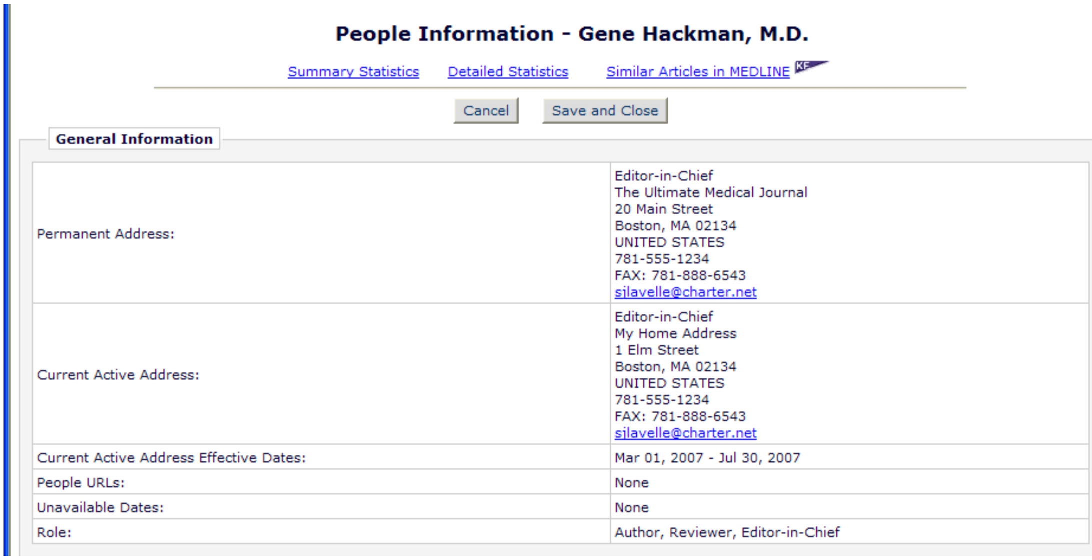
NOTE: Confirming the deletion of the Alternate Contact Information also deletes any Alternate Contact Notes that have been entered.

The *Unavailable Dates* page can be accessed in one of the following ways:

1. Clicking the new Update My Unavailable Dates link on the *Author Main Menu*.
2. Clicking the Unavailable Dates link located on the *Update My Information* page and *Search People – Update Information* pages.
3. Clicking on a deep link inserted by the %UPDATE_UNAVAILABLE_DATES% merge field within a system e-mail.

There are no changes to the *Unavailable Dates* page itself.

The *People Information* page is also enhanced to display Alternate Address information.


People Information - Gene Hackman, M.D.

Summary Statistics   Detailed Statistics   Similar Articles in MEDLINE

Cancel   Save and Close

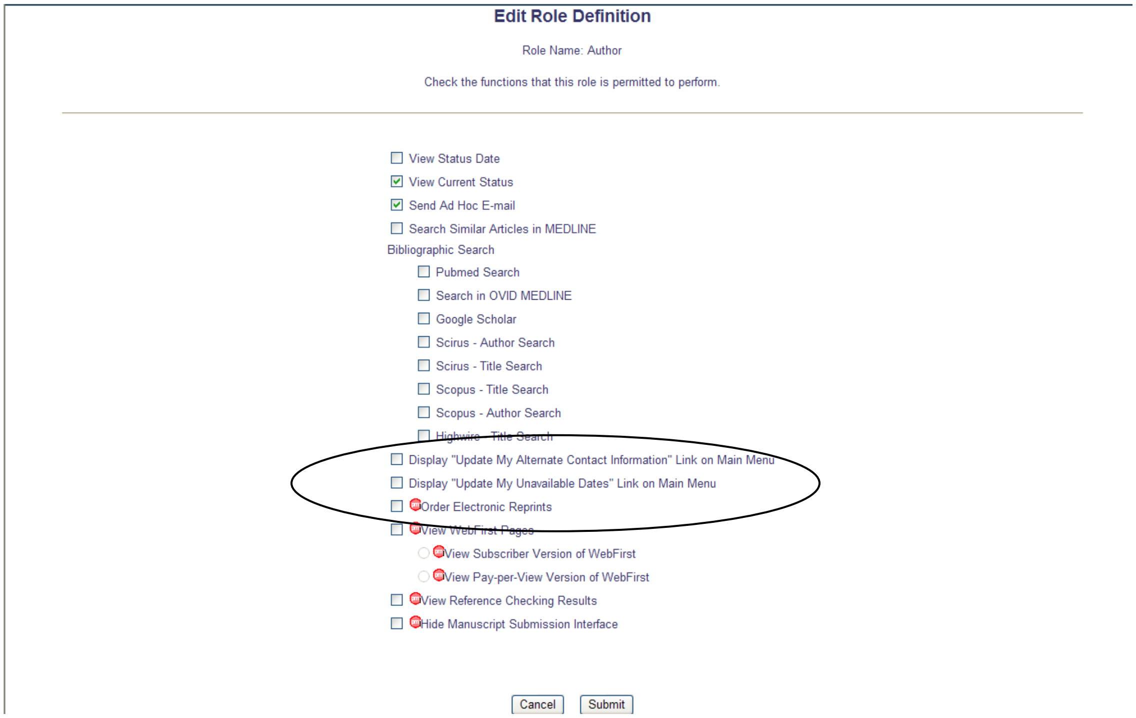
General Information

Permanent Address:	Editor-in-Chief The Ultimate Medical Journal 20 Main Street Boston, MA 02134 UNITED STATES 781-555-1234 FAX: 781-888-6543 silavelle@charter.net
Current Active Address:	Editor-in-Chief My Home Address 1 Elm Street Boston, MA 02134 UNITED STATES 781-555-1234 FAX: 781-888-6543 silavelle@charter.net
Current Active Address Effective Dates:	Mar 01, 2007 - Jul 30, 2007
People URLs:	None
Unavailable Dates:	None
Role:	Author, Reviewer, Editor-in-Chief

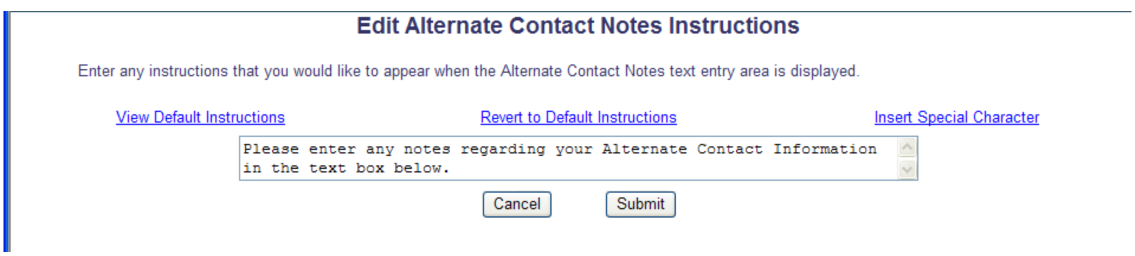
TO CONFIGURE: Go to Author RoleManager to give Authors more visibility to Alternate Contact Information and Unavailable Dates:

- Selecting the 'Display "Update my Alternate Contact Information" link on Main Menu' option will cause the Alternate Contact Information link to display on an Author's Main Menu when he logs into the system.
- Selecting the 'Display "Update my Unavailable Dates" link on Main Menu' option will cause the Unavailable Dates link to display on an Author's Main Menu when he logs into the system.

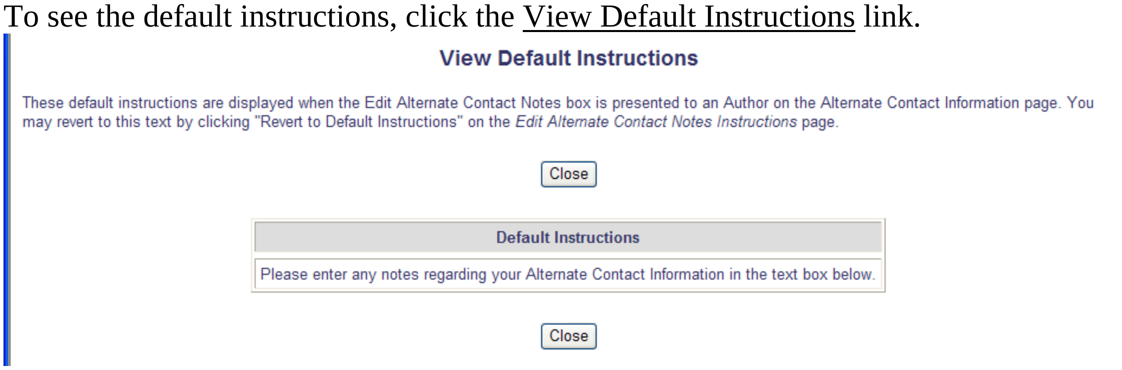
NOTE: The default setting for each of these permissions is 'off'. Neither setting is selected upon upgrade.



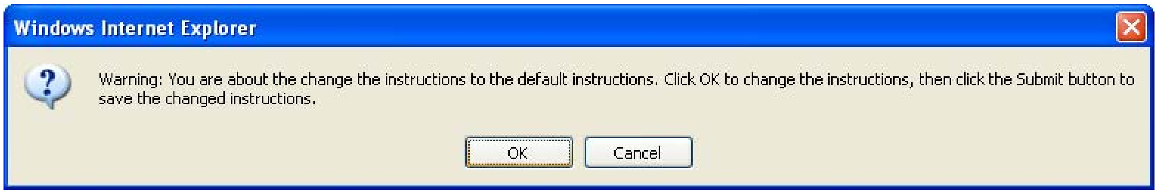
To customize the instructions displayed for the new Alternate Contact Notes field on the *Alternate Contact Information* page, click the Edit Alternate Contact Notes Instructions link under the General Policies heading in PolicyManager.



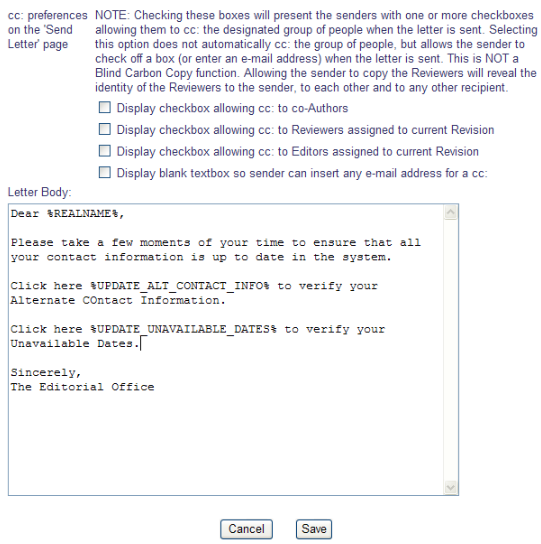
To see the default instructions, click the View Default Instructions link.



If you have customized the instructions and want to revert to the default instructions, click the Revert to Default Instructions link. Click 'OK' to confirm.



If you want to insert the two new merge fields in a letter template, click the Edit Letters link under the 'E-mail and Letter Policies' section in PolicyManager. You can then create a new letter, or modify an existing letter to include the new merge fields.

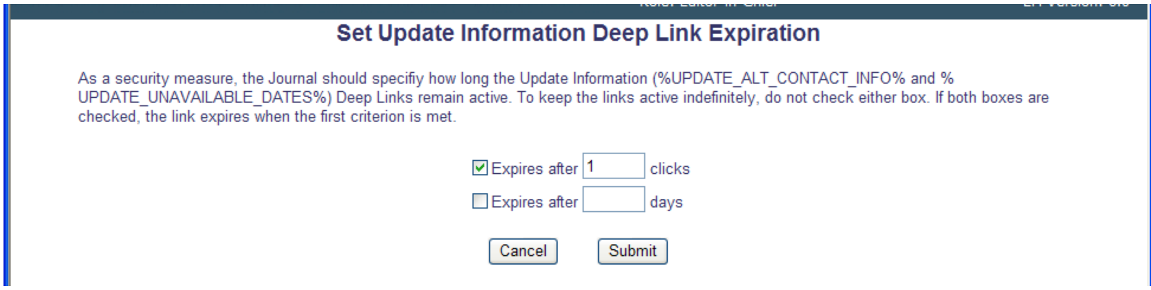


.

NOTE: The %UPDATE_ALT_CONTACT_INFO% and %UPDATE_UNAVAILABLE_DATES% merge fields can be used in any letter. However, the recipient must have a user record in the system in order for the deep link to work (i.e. user-entered e-mail recipients not in the system will not be able to use the deep links).

To set the expiration policy for the new deep links, click the Set Update Information Deep Link Expiration link in the General Policies section of PolicyManager. Then specify the expiration policy for the deep links (i.e. how long the link is active):

- At time of upgrade, the option 'Expire link after 1 clicks' is selected.
- If neither option is selected (both boxes are unchecked), the deep link will remain active indefinitely.


Set Update Information Deep Link Expiration
As a security measure, the Journal should specifiy how long the Update Information (%UPDATE_ALT_CONTACT_INFO% and %UPDATE_UNAVAILABLE_DATES%) Deep Links remain active. To keep the links active indefinitely, do not check either box. If both boxes are checked, the link expires when the first criterion is met.
Expires after 1 clicks
Expires after days
Cancel
Submit

Search Submissions Enhancements

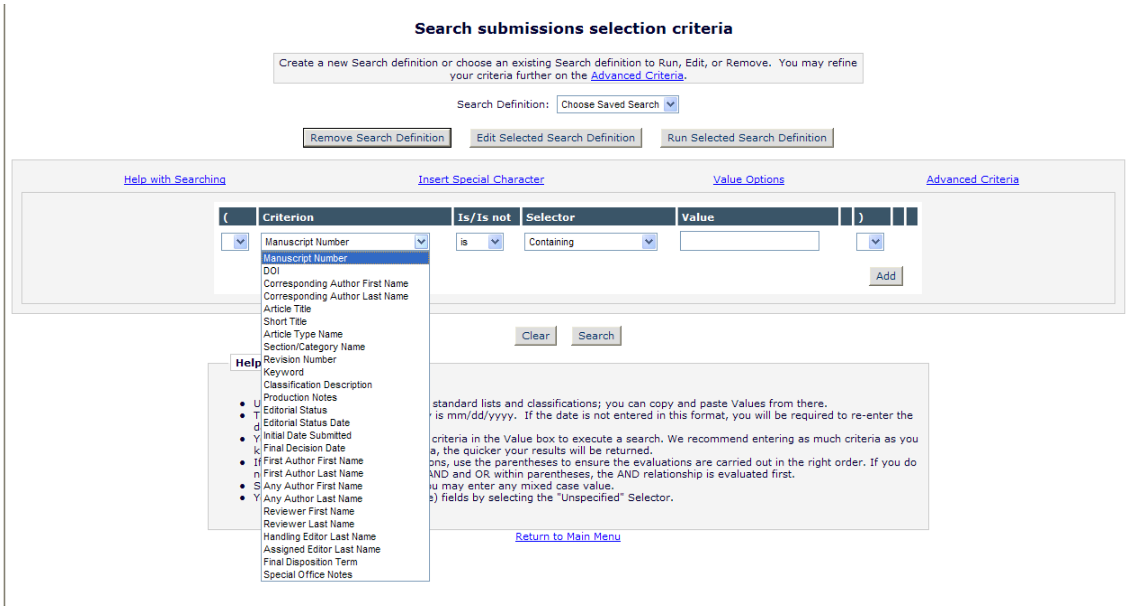
In version 5.0, the *Search Submissions* feature is limited to standard EM submission and workflow metadata, and the user is limited to 3 sets of search criteria. To run a search, an Editor or Publisher Role user must have RoleManager permission to 'Search All Manuscripts' or 'Search All Assigned Manuscripts'.

In version 6.0, *Search Submissions* has been enhanced to be more user-friendly and comprehensive. Some of the key enhancements include:

1. The limit of three search terms is removed, allowing users to add as many search terms as they wish.
2. The user can specify the prioritization of AND/OR search terms using parentheses (the default gives AND priority over OR).
3. There is a new NOT selector for each criterion.
4. There are new drop-down Value selectors for certain combinations of Criterion and Selector, allowing users to select list item values.
5. The user can toggle between Editorial and Production-related search results, saving the last selected view as a preference.
6. Search Criteria is extended to incorporate Additional Manuscript Details (fields created by the Administrator in PolicyManager).
7. The standard list of Search Criteria is extended to incorporate key Production Tracking metadata (production tracking users only), Production Notes, Final Decision Date, and Additional Manuscript Details (fields created by the Administrator in PolicyManager).

Below is the *Search Submissions Selection Criteria* page display when running a new search for all publications. Note the new fields available for selection:

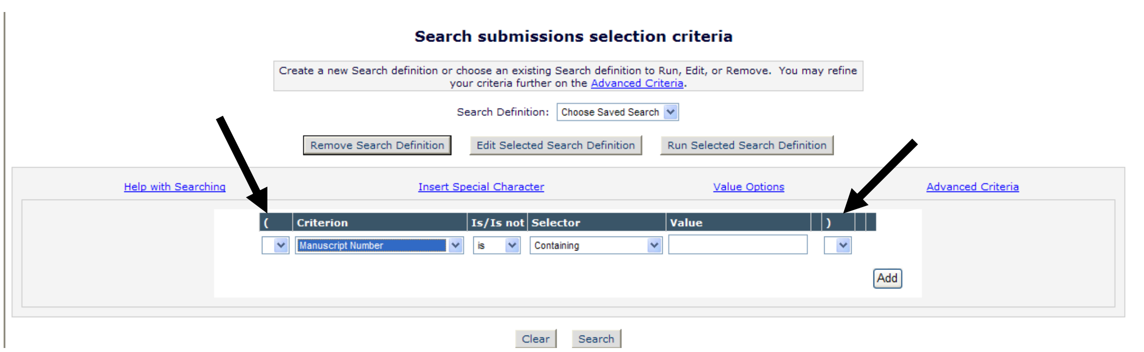
- Production Notes
- Final Decision Date
- Editorial Status – this is simply a new label for the 'Status' field in 5.0.
- Editorial Status Date - this is simply a new label for the 'Status Date' field in 5.0.
- If the journal has any Additional Manuscript Details fields configured to display in the *Search Submissions* interface, these are also listed.



There are two new columns to accommodate new parenthesis functionality. These columns allow a user to set evaluation priorities by enclosing a set of search terms in parenthesis. Criteria enclosed in parenthesis are executed first.

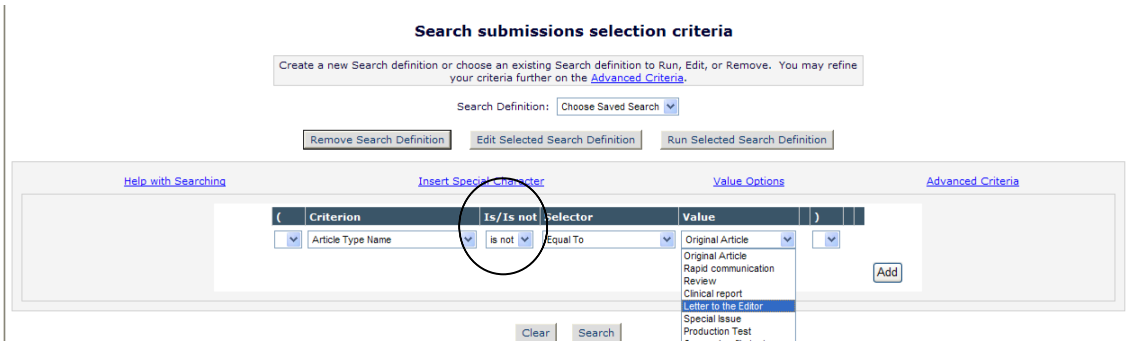
- A column is added to the beginning of the table; for each search term, this contains a drop down menu with two values: null, and an opening parenthesis character, (.
- A column is added after the Value criteria; for each search term, this contains a drop down menu with two values: null, and a closing parenthesis character,).

When this page is displayed for a new search, the parentheses around the first search term are set to null; otherwise, the parentheses from the search term are displayed.

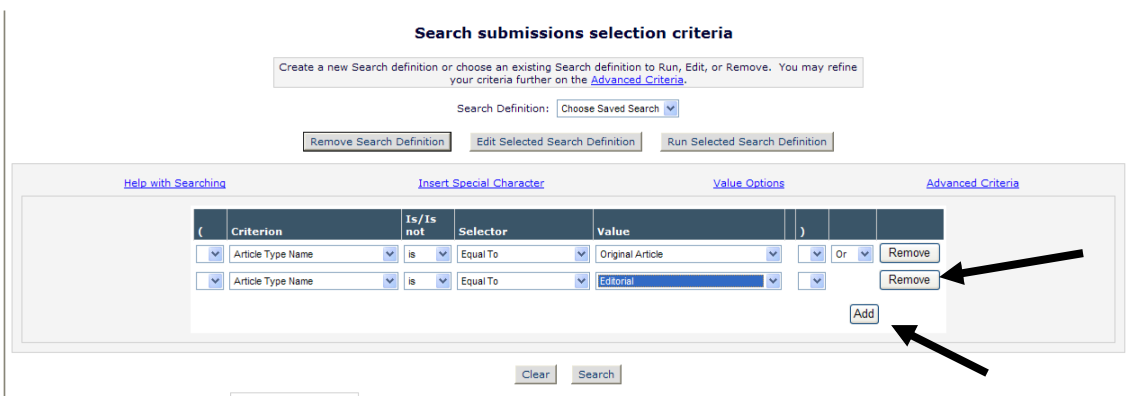


NOTE: If the user runs a saved search created before upgrade to version 6.0, the location of parentheses will not have been saved; if the search has three terms, these are displayed surrounding the first pair of search terms.

A new 'Is/Is Not' column is added to accommodate enhanced NOT functionality. For each search term, this contains a drop down with two values: 'Is' and 'Is Not'. Selecting NOT will negate the search term. In the example below, the results will return all submissions that do NOT have the Article Type = Letter to the Editor.



To add a second set of criteria, click the 'Add' button and a new row is added to the search definition table. To delete a set of criteria, click the 'Remove' button. Note that removing a search row does not attempt to re-balance parentheses within the query.



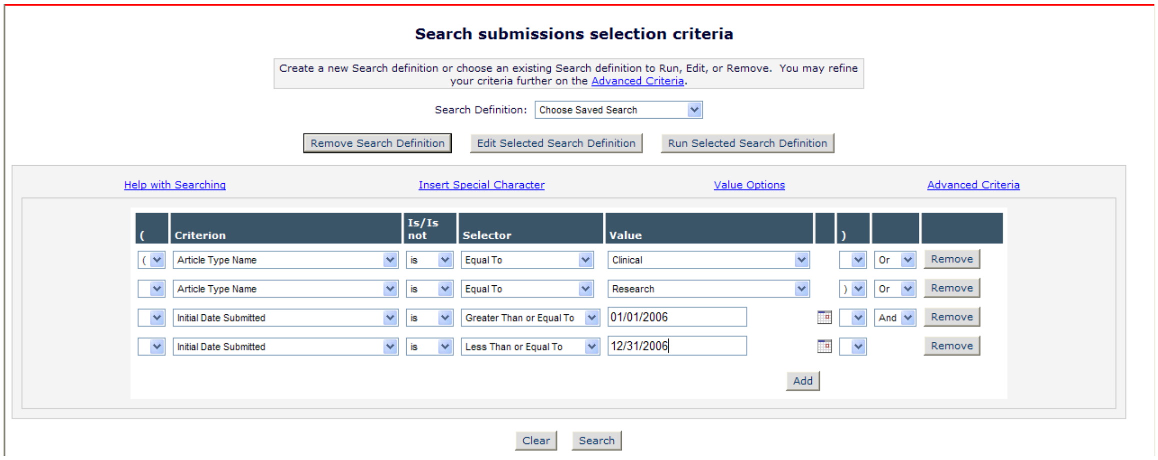
In version 5.0, the final column contains a drop-down with the values END/AND/OR/NOT. This is simplified, so that only two values are listed: 'OR' and 'AND'. This allows the user to select the join operator for search terms.

Depending on what Criterion the user selects, the default Selector and Value list may change. This reduces the likelihood of a user entering an invalid search term. For example:

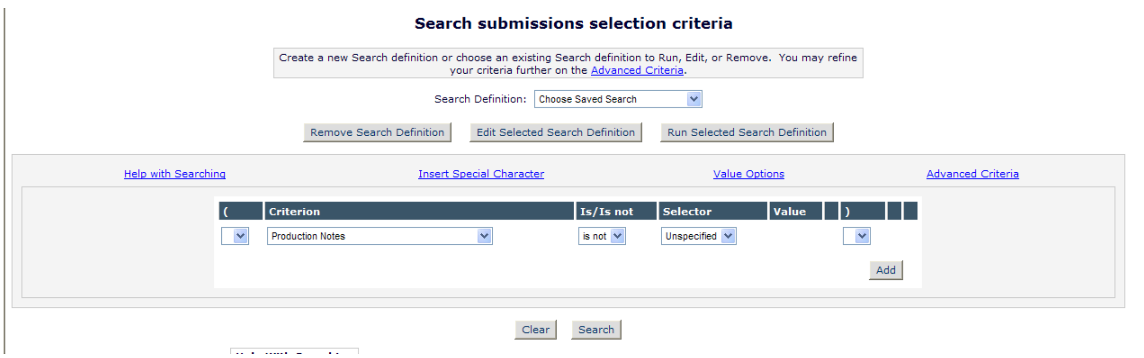
- If the user selects 'Article Type Name' for the first Criterion, the default Selector changes from 'Containing' to 'Equal To', and the Value drop-down lists all Article Types in the system.
- If the user selects 'Final Decision Date' for the first Criterion, the default Selector changes from 'Containing' to 'Equal To', and the calendar icon is displayed to assist with the date entry.

- If the user selects ‘Production Notes’ for the first Criterion, the default Selector remains ‘Containing’, and Value is a text entry box.

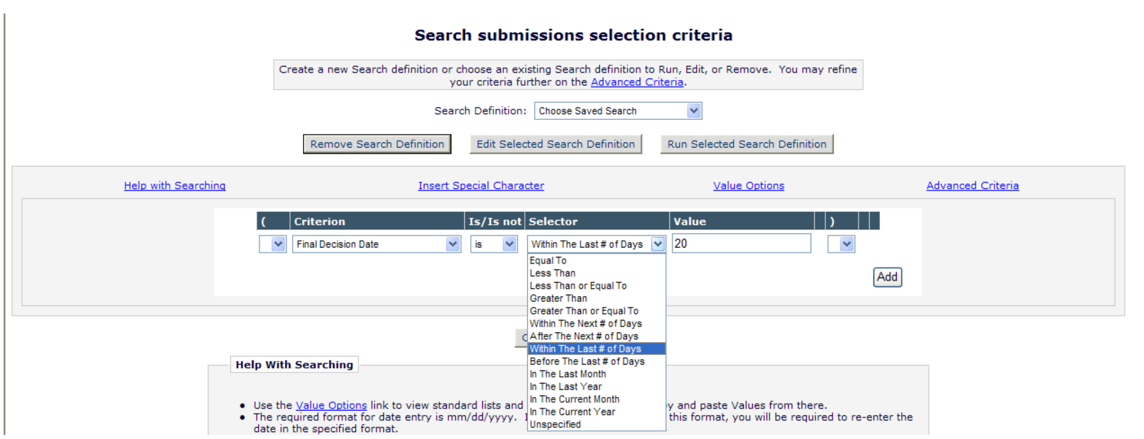
Example #1: Search for all Original Articles submitted to the journal last year.



Example #2: Search for all submissions that have data in the Production Notes field.

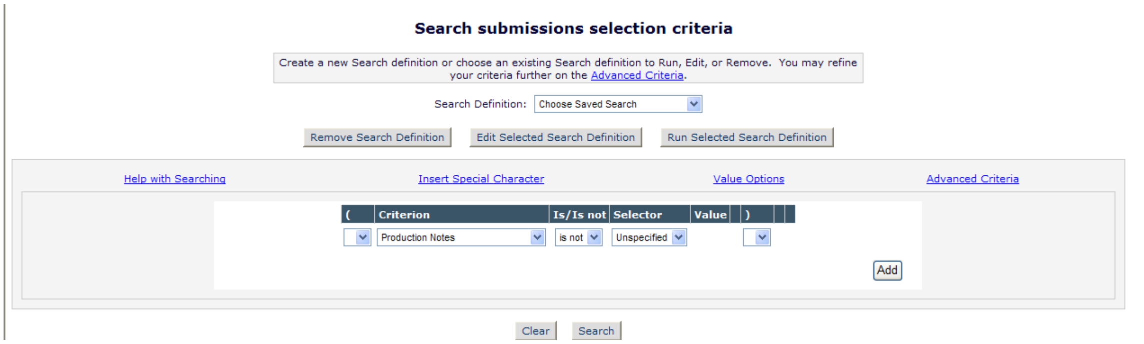


There are several new options for date fields in the Selector drop-down list. In the example below, the results will return all submissions where the Final Decision Date was within the last 20 days.



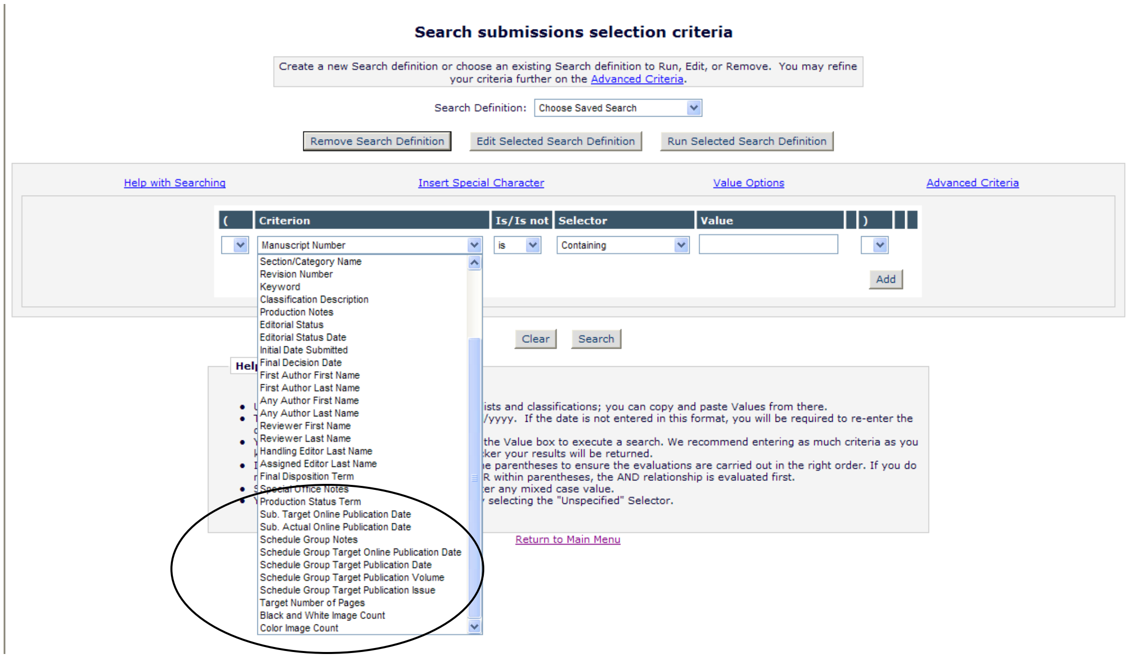
The ‘Unspecified’ Selector is a new value, replacing the need to type in the word ‘null’ in version 5.0. This option is displayed only for items where a null value is possible; if the business logic is such that a value is mandatory, the Unspecified Selector is not displayed (i.e. every submission must have a title, so ‘Unspecified’ is suppressed for the Criterion ‘Article Title’). In the example below, the results returned contain all submissions in the system with data in the Production Notes field (the search term translates to ‘Production Notes is not null’.

NOTE: A ‘null’ value means ‘empty’, or ‘no value’. So if Production Notes for a manuscript ‘is null’, that manuscript does not have anything in the Production Notes field.



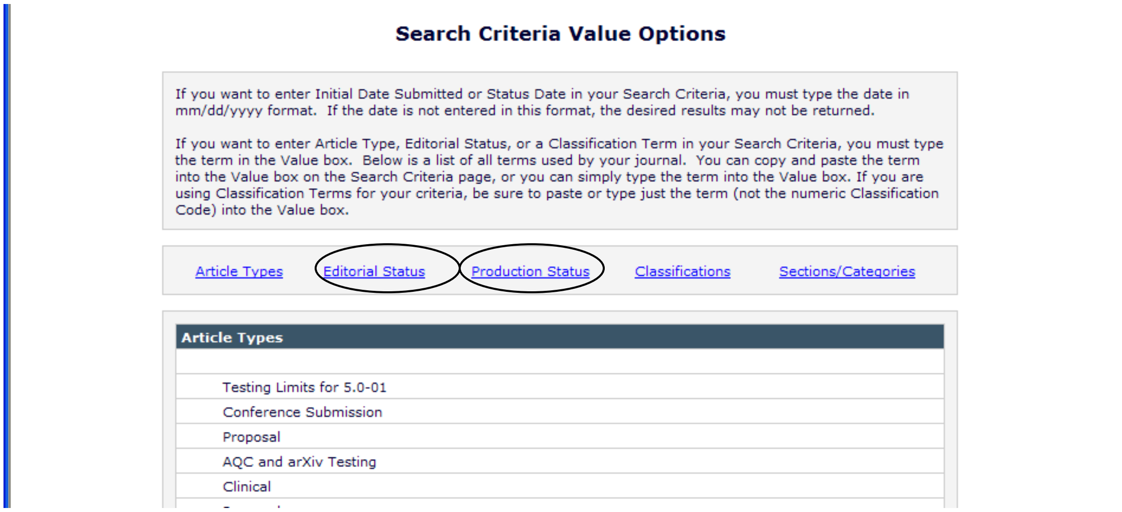
Below is the *Search Submissions Selection Criteria* page display when running a new search, for a publication that is using Production Tracking, and the user has access to the *Production Menu* (via relevant RoleManager permissions). Note the new production tracking fields available for selection:

- Production Status
- Sub. Target Online Publication Date
- Sub. Actual Online Publication Date
- Schedule Group Description
- Schedule Group Notes
- Schedule Group Target Online Publication Date
- Schedule Group Target Publication Date
- Schedule Group Target Publication Volume
- Schedule Group Target Publication Issue
- Target number of pages
- Black and White Image Count
- Color Image Count



Clicking the Value Options link opens a pop-up listing all the values of list-based Criterion. Production Status is added to the page, as long as there is at least one user-defined Production Status created in PolicyManager, and the user has appropriate RoleManager permission. Also note that the anchor link for Manuscript Status has been changed to Editorial Status.

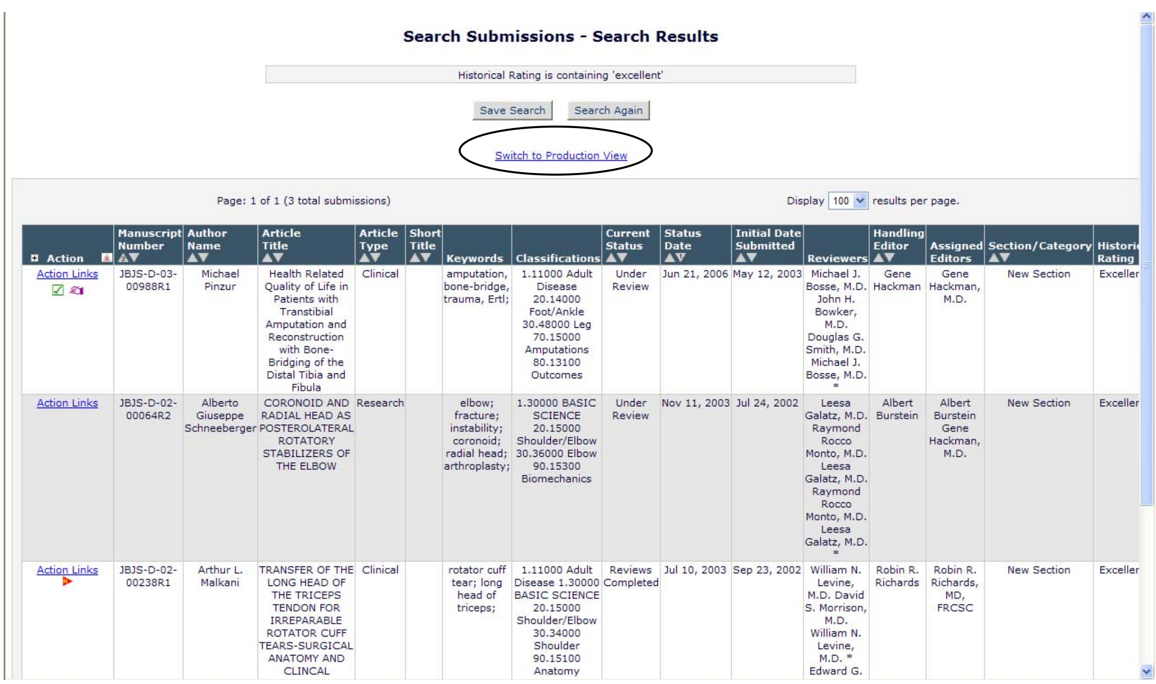
NOTE: If the user selects a Criterion representing a standard list **and** also selects the "Equal to" Selector, the system displays a drop-down selector listing all values defined for that criterion (i.e. for the Criterion 'Article Type is Equal to', the Value will be a *drop-down list* of all Article Types. But if the "Contains" selector is used (i.e. 'Article Type is Containing'), the Value is a *text box* where the user can type a value. This allows the user to retain the option to use a "Contains" Selector and type a Value to search for related terms based on, for example, the same stem word.



The *Search Results* page is enhanced to allow users to switch between the Editorial View and the new Production View of submissions returned by the search query. The Production View is only available to users with access to the *Production Tasks* menu. Both views are now dynamic, displaying any Additional Manuscript Details used in the search query.

NOTE: Additional Manuscript Detail Fields are only displayed in the results if they are also used in the query.

The user can switch to the Production View by clicking the Switch to Production View link at the top or bottom of the *Search Results* page (if the publication is using Production Tracking and the user has permission to access the *Production Tasks Menu*).



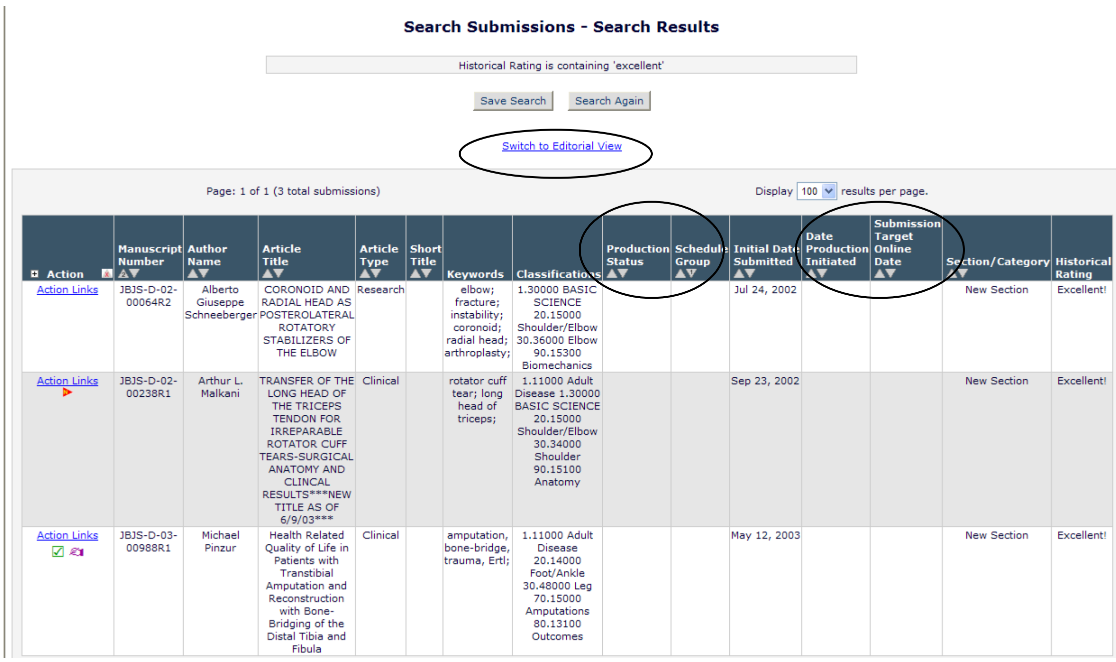
The Production View displays different information than the Editorial View. The following fields are *suppressed* in the Production View:

- Current Status (Editorial Status)
- Status Date (Editorial Status Date)
- Reviewers
- Handling Editor
- Assigned Editors

The following fields are *added* in the Production View:

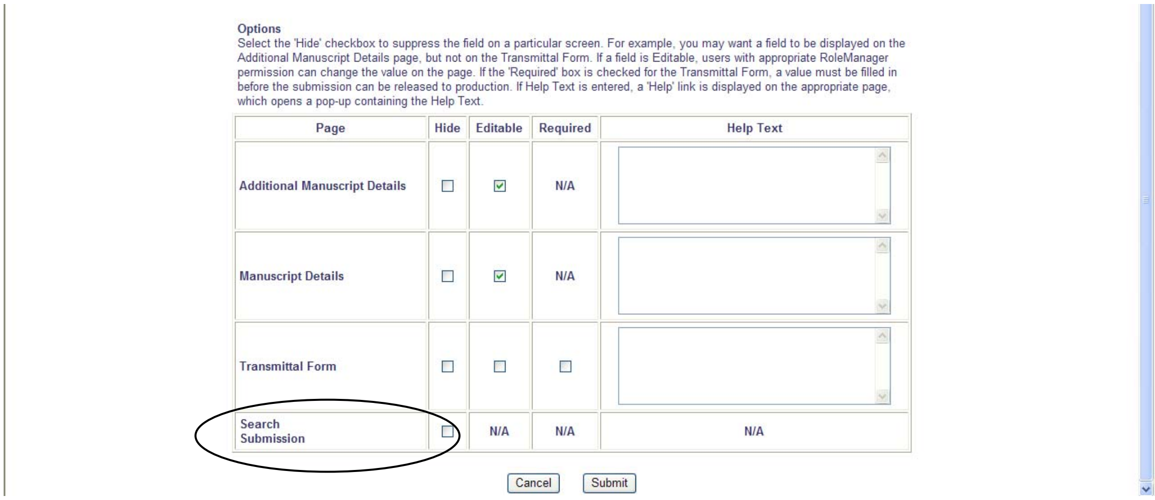
- Schedule Group
- Production Status
- Date Production Initiated
- Submission Target Online Date

A user can also toggle back to the Editorial View by clicking the <u>Switch to Editorial View</u> link at the top or bottom of the *Search Results* page.



TO CONFIGURE: No configuration is required to benefit from the enhanced *Search Submissions* interface. However, to see the Production Tracking fields in the Criterion list, Production Tracking must be enabled for the publication, and the user must have access to the *Production Tasks Menu*.

To add an Additional Manuscript Detail field to the *Search Submissions* interface, click the Add/Edit Additional People Detail Fields link in the Additional Data Policies section of PolicyManager. Then Edit the field you want to add, and select the appropriate box to display the field in the *Search Submissions* interface.

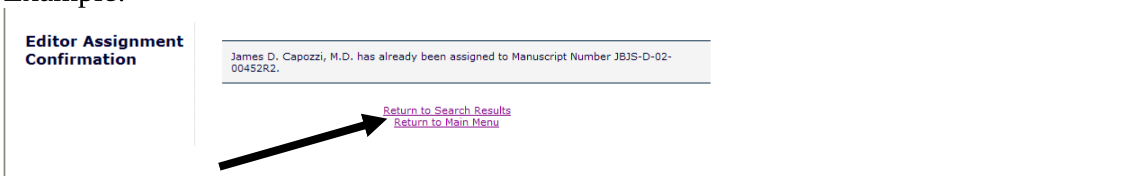


NOTE: There are no 'Editable', 'Required' or 'Help text' options, as these are not relevant for searching submissions.

Return to Search Results

In EM version 5.0, when a user runs a search on the *Search Submissions* page and carries out an action from the *Search Results* (i.e. by clicking an action link in the ‘Action’ column), he cannot consistently return to his initial search results to continue working. In version 6.0, a Return to Search Results link is added to all terminal pages from such actions (usually confirmation pages), so that users can easily return to the search results page to access other submissions from the result set.

Example:



NOTE: A submission modified as a result of an action link could potentially not fit the search criteria when the search is re-run, and not appear in the search results.

Example: The user searches for the submission by the article title, and uses the ‘Edit Submission’ action link to make changes to the submission. In the course of editing the submission they change the article title so that it no longer matches the one used in their search. When the submission is rebuilt and approved it no longer fits the search criteria used in the initial search, so it will no longer appear in the results if the Return to Search Results link is used.

TO CONFIGURE: No configuration is necessary.

The enhancements described from this point forward are applicable to publications using production tracking only.

User Defined Production Statuses for Production Tracking

In version 5.0 of Preprint Manager, the Production Status Grid provides an overview of the progress of a submission through the production workflow, by presenting a table of selected production tasks to the user. To assess how far through the production process a submission is, a user has to visually assess which columns in the grid have been completed, or use the *History* to review all tasks that have been assigned.

In version 6.0, User-Defined Production Statuses complement this functionality by supporting custom status terms which are applied to submissions based on rules defined by the Administrators.

The system checks for a change in a submission's Production Status whenever a submission is put into production or has production completed, or whenever a production task for that submission is assigned, submitted or cancelled.

To use this feature, Administrators must define a set of Production Status Terms. Each status term has an associated set of rules, or conditions, which the system will assess when a status check is triggered. These rules work by checking any existing production tasks previously linked to the submission, if any, and seeing which have ever been started or completed, or are currently in progress.

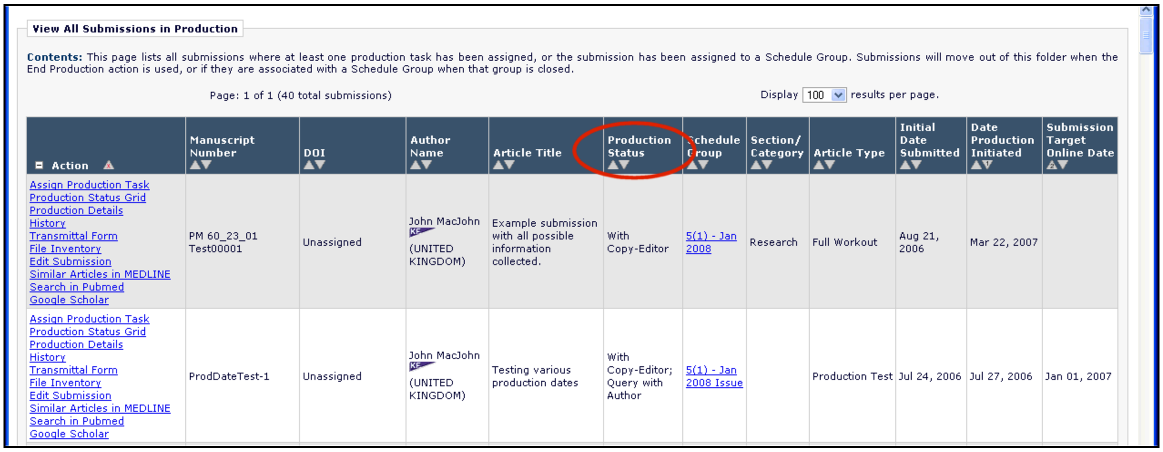
Each individual status term is assessed separately, and it is possible for multiple individual status terms to be linked to a submission at the same time to give an overall Production Status, which is a composite of those terms. For example a submission could go through the following production status changes:

1) With Copyeditor
2) With Copyeditor; Clarification Requested from Author
3) With Copyeditor; Clarification Requested from Author; Artwork being Redrawn
4) With Copyeditor; Artwork being Redrawn
5) With Copyeditor
6) Copyediting Complete

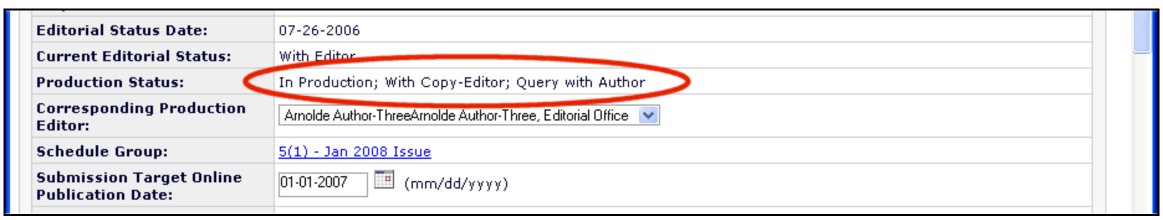
In the above example, items 2, 3 and 4 are different combinations of three separate status terms, assigned to this submission by different rules that evaluate the state of production tasks related to copyediting, querying the Author and redrawing artwork. As each task is assigned or submitted, the overall status is reevaluated, dropping or adding the individual component terms.

There are two different composite Production Statuses that can appear. In folders and *Details* pages, all current status terms appear against each submission. In the *History* page, only special status terms configured with a ‘Record in History’ option are shown, allowing you to concentrate on only the most important status changes.

The new Production Status terms appear in a new column in the main production tracking folders. All production status terms currently associated with a submission appear here, not just those marked as ‘Record in History’.



The default *Production Details* page now displays the full Production Status term(s) after the ‘In Production’ status term.



NOTE: New to 6.0, you can customize the *Details* page in PolicyManager. If you are using customized *Details* pages, the Editorial and Production Details layouts can be modified to add or remove this status term as desired.

The *History* page for a submission now displays a history of changes in Production Status terms if the current user has permission to view it. This is in addition to the existing functionality that listed the actual production task assignments.

Not every change in Production Status is recorded in History. The History lists only those Production Status terms that are configured with ‘Record in History’ set; and a new entry is created only when such a status is removed from, or added to a submission when a status check is triggered.

[Screen shots required – current version is not showing custom status terms; here’re the shots from the spec]

Timeline View:

History for Manuscript Number: JXYZ-D-03-00006R1, DOI: Unassigned
John MacJohn (UNITED KINGDOM): "Sample"

Status History   Production Task History   Correspondence History

Switch to Status Type View

Close

STATUS HISTORY

Status Date	Document Status	Edit Submission Status	Production Status	Status Days	Role Family	Revision	Operator
Nov 18, 2006			With Typesetter	9			John MacJohn
Nov 15, 2006			Awaiting Action; Copy-Editing Complete	2			Charlie Copy-Editor
Nov 06, 2006			Copy-Editing in Progress; Artwork being Redrawn	8			Charlie Copy-Editor [Proxied by John MacJohn]
Nov 03, 2006			Copy-Editing in Progress	2			John MacJohn
Nov 02, 2006		Editor Approved Edited Submission		----	EDITOR	0	John J MacJohn, BSc
Nov 02, 2006		PDF Needs Editor Approval		----	EDITOR	0	John J MacJohn, BSc
Nov 02, 2006		Building PDF for Editor		----	EDITOR	0	John J MacJohn, BSc
Nov 02, 2006	With Editor	Incomplete with Editor		----	EDITOR	0	John J MacJohn, BSc
Jun 15, 2006			Production Initiated	1			John J MacJohn, BSc [Proxied by John J MacJohn, BSc]
Jun 15, 2006	With Editor			----	EDITOR	0	John J MacJohn, BSc
Jun 15, 2006	Submitted to Journal			----	EDITOR	0	Anne Author [Proxied by John J MacJohn, BSc]
Jun 15, 2006	Needs Approval by Author			----	AUTHOR	0	Anne Author [Proxied by John J MacJohn, BSc]
Jun 15, 2006	Building PDF			----	AUTHOR	0	Anne Author [Proxied by John J MacJohn, BSc]
Jun 15, 2006	Incomplete with Author Test			----	AUTHOR	0	Anne Author [Proxied by John J MacJohn, BSc]

PRODUCTION TASK HISTORY

Production Task	Date Task Assigned	Date Task Due	Assigned To	Assigned By	Production Task Status	Date Task Closed	Closed By
Author First Proof	Mar 01, 2006	Mar 06, 2006	Anne Author	Alden Contact	Open		
Typesetting	Feb 20, 2006	Mar 04, 2006	Alden Contact	John MacJohn	Completed	Mar 01, 2006	Alden Contact
Request Artwork from Author	Feb 10, 2006	Feb 18, 2006	John MacJohn	Charlie Copy-Editor	Completed	Feb 18 , 2006	Anne Author
Copy Editing	Feb 08, 2006	Feb 14, 2006	Charlie Copy-Editor	John MacJohn	Completed	Feb 18, 2006	Charlie Copy-Editor

CORRESPONDENCE HISTORY

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Mar 31, 2006	PT - Copy-Editing complete	John MacJohn	Awaiting Action; Copy-Editing Complete		John MacJohn
Mar 28, 2006	PT - General Reminder	Charlie Copy-Editor	Copy-Editing in Progress		John MacJohn
Feb 08, 2006	PT - Copy-Editing Assignment	Charlie Copy-Editor	Copy-Editing in Progress		John MacJohn
Feb 01, 2006	PT - Request new artwork from author	John MacJohn	Awaiting Action; New in Production		John MacJohn
Apr 10, 2003	Reviewer - Notice of Final Disposition Accepted	Ronaldo Reviewer1	Completed	1	John MacJohn
Apr 10, 2003	Reviewer - Notice of Final Disposition Accepted	Enn Editor	Completed	1	John MacJohn
Apr 10, 2003	Publisher Notification of Accepted Manuscript	John MacJohn	Completed	1	John MacJohn
Apr 10, 2003	Editor Decision - Accept	John MacJohn	Accept	1	John MacJohn
Mar 10, 2003	Editor Assignment	Arnold Editor	With Editor	0	John MacJohn
Mar 10, 2003	Author Notice of Manuscript Number	John MacJohn	"Submitted" to 'Journal'	0	John MacJohn
Feb 25, 2003	Author Submits New Manuscript Confirmation	John MacJohn	"Submitted" to 'Journal'	0	John MacJohn
Feb 25, 2003	Journal Office Notice New Submission	John MacJohn	"Submitted" to 'Journal'	0	John MacJohn
Feb 25, 2003	PDF Built and Requires Approval	John MacJohn	Building PDF	0	John MacJohn

Close

Status History   Production Task History   Correspondence History

Switch to Status Type View

Status Type View:

History for Manuscript Number JXYZ-D-03-00006R1

Status History Edit Submission History Production Status History Production Task History Correspondence History Production Correspondence History

Switch to Timeline View

Close

STATUS HISTORY

Status Date	Document Status	Status Days	Role Family	Revision	Operator
Apr 10, 2003	Completed	----	EDITOR	1	John MacJohn
Apr 10, 2003	Accept	----	EDITOR	1	John MacJohn
Apr 10, 2003	Decision in Process	----	EDITOR	0	Arnold Editor [Proxied by John MacJohn]
Mar 26, 2003	Required Reviews Completed	15	EDITOR	0	Annie Associate-Editor [Proxied by John MacJohn]
Mar 10, 2003	With Editor	10	EDITOR	0	John MacJohn
Feb 25, 2003	"Submitted" to 'Journal'	13	EDITOR	0	Anne Author

EDIT SUBMISSION STATUS HISTORY

Status Date	Edit Submission Status	Status Days	Role Family	Revision	Operator
Nov 02, 2006	Editor Approved Edited Submission		EDITOR	0	John J MacJohn, BSc
Nov 02, 2006	PDF Needs Editor Approval	0	EDITOR	0	John J MacJohn, BSc
Nov 02, 2006	Building PDF for Editor	0	EDITOR	0	John J MacJohn, BSc
Nov 02, 2006	Incomplete with Editor	0	EDITOR	0	John J MacJohn, BSc

PRODUCTION STATUS HISTORY

Status Date	Production Status	Status Days	Operator
Mar 02, 2006	Author First Proof; Proof downloaded by Author	----	Anne Author
Mar 01, 2006	Author First Proof; Awaiting download by Author	1	Alden Contact
Feb 20, 2006	With Typesetter	9	John MacJohn
Feb 18, 2006	Awaiting Action; Copy-Editing Complete	2	Charlie Copy-Editor
Feb 10, 2006	Copy-Editing in Progress; Artwork being Redrawn	8	Charlie Copy-Editor [Proxied by John MacJohn]
Feb 08, 2006	Copy-Editing in Progress	2	John MacJohn
Jan 30, 2006	Awaiting Action; New in Production	9	John MacJohn
Jan 30, 2006	Production Initiated	----	John MacJohn

PRODUCTION TASK HISTORY

Production Task	Date Task Assigned	Date Task Due	Assigned To	Assigned By	Production Task Status	Date Task Closed	Closed By
Author First Proof	Mar 01, 2006	Mar 06, 2006	Anne Author	Alden Contact	Open		
Typesetting	Feb 20, 2006	Mar 04, 2006	Alden Contact	John MacJohn	Completed	Mar 01, 2006	Alden Contact
Request Artwork from Author	Feb 10, 2006	Feb 18, 2006	John MacJohn	Charlie Copy-Editor	Completed	Feb 18 , 2006	Anne Author
Copy Editing	Feb 08, 2006	Feb 14, 2006	Charlie Copy-Editor	John MacJohn	Completed	Feb 18, 2006	Charlie Copy-Editor

CORRESPONDENCE HISTORY

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Apr 10, 2003	Publisher Notification of Accepted Manuscript	John MacJohn	Completed	1	John MacJohn
Apr 10, 2003	Editor Decision - Accept	John MacJohn	Accept	1	John MacJohn
Apr 10, 2003	Journal Office Notice Editor Decision Notification	John MacJohn	Decision in Process	1	Arnold Editor [Proxied by John MacJohn]
Feb 25, 2003	Author Submits New Manuscript Confirmation	John MacJohn	Submitted to Journal	0	John MacJohn
Feb 25, 2003	Journal Office Notice New Submission	John MacJohn	Submitted to Journal	0	John MacJohn
Feb 25, 2003	PDF Built and Requires Approval	John MacJohn	Building PDF	0	John MacJohn

PRODUCTION CORRESPONDENCE HISTORY

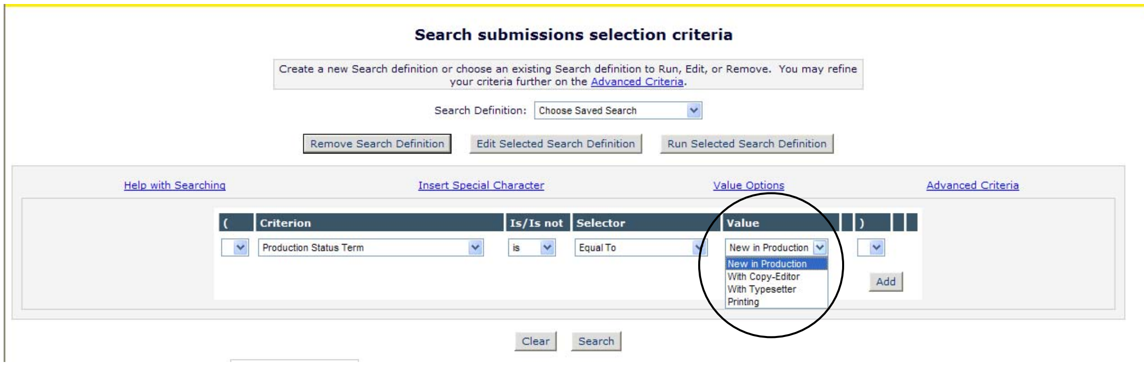
Correspondence Date	Letter	Recipient	Production Status	Operator
Mar 01, 2006	PT - Author Proof Notice	Anne Author	Author First Proof; Awaiting download by Author	Alden Contact
Mar 01 , 2006	PT - Typesetting Complete	John MacJohn	With Typesetter	Alden Contact
Feb 20 , 2006	PT - Typesetting Order	Alden Contact	With Typesetter	John MacJohn
Feb 18 , 2006	PT - Copy-Editing complete	John MacJohn	Awaiting Action; Copy-Editing Complete	Charlie Copy-Editor [Proxied by John MacJohn]
Feb 18, 2006	PT - Author Artwork Returned	John MacJohn	Copy-Editing in Progress	Anne Author
Feb 10, 2006	PT - Author Artwork Request	Anne Author	Copy-Editing in Progress; Artwork being Redrawn	John MacJohn
Feb 08, 2006	PT - Copy-Editing Assignment	Charlie Copy-Editor	Copy-Editing in Progress	John MacJohn

Close

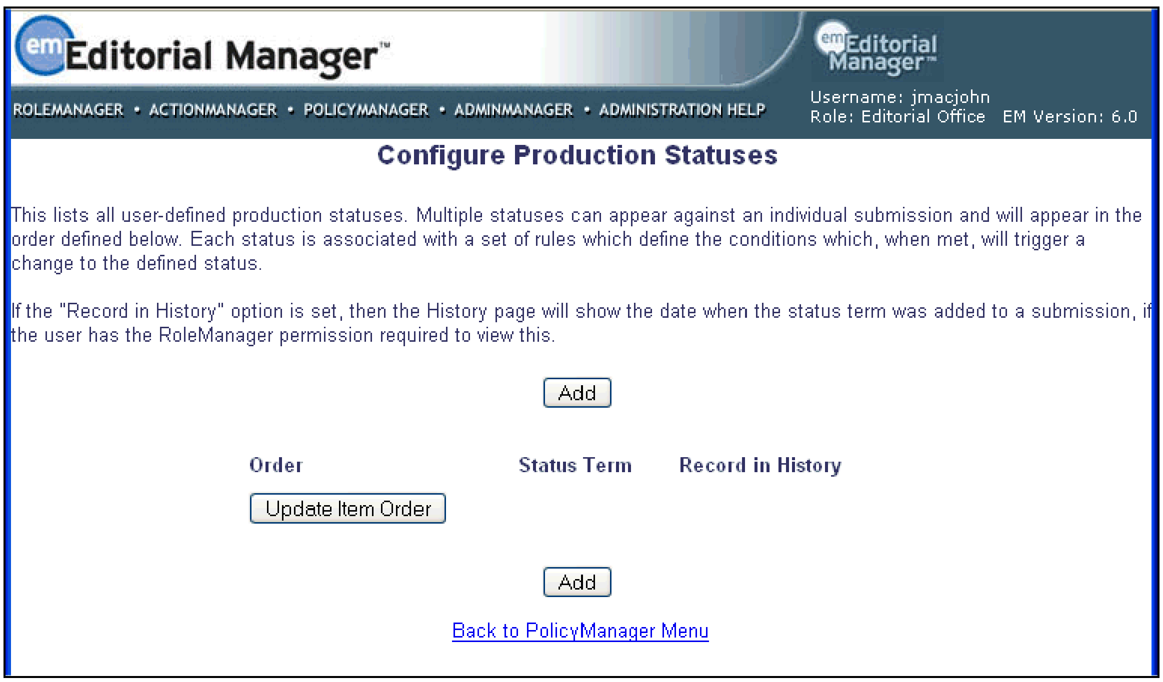
Status History Edit Submission History Production Status History Production Task History Correspondence History Production Correspondence History

Switch to Timeline View

The new Production Status terms are added to the *Search Submission*s interface as a new Criterion, so you can create a search to identify all submissions at a specific production stage. Each custom status term automatically displays in the value dropdown when this criterion is selected.

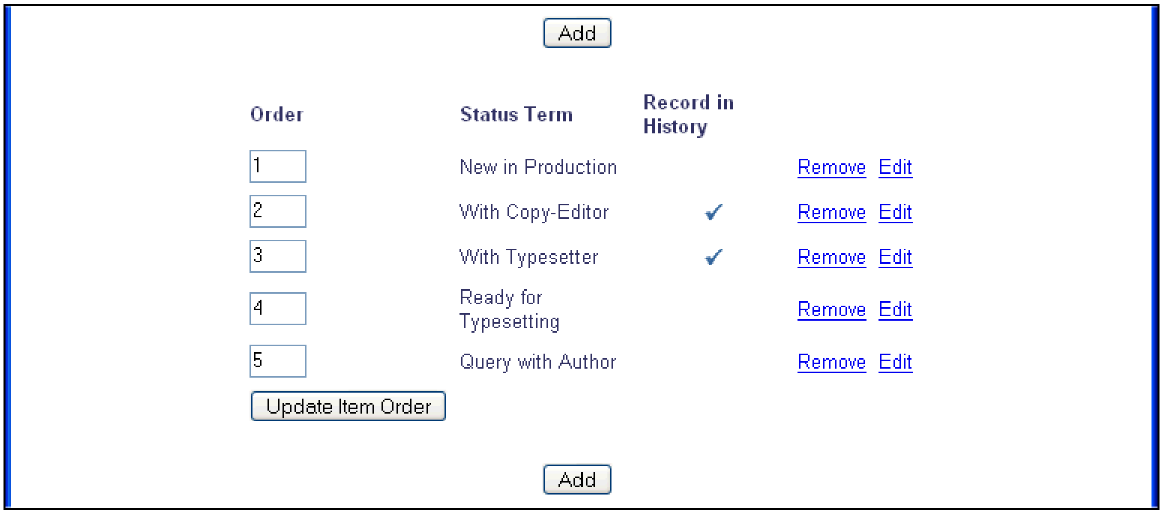


TO CONFIGURE: Click the new Configure Production Statuses link in the PreprintManager section of PolicyManager. Note this link is only displayed for publications using production tracking. Clicking this link takes you to the *Configure Production Statuses* page.



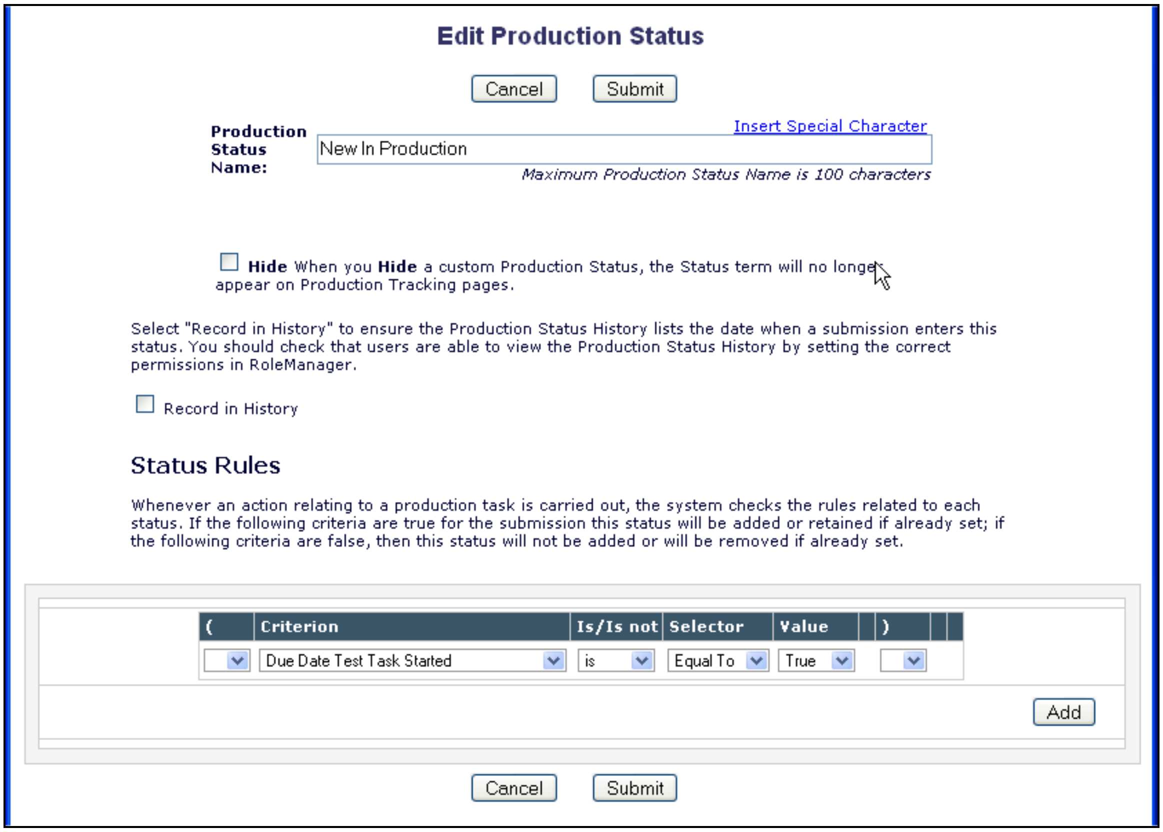
Click the 'Add' button to define new status terms. Once multiple terms have been added, you can specify the order in which the status terms will be shown when combined together as a Production Status on production pages and the *History* page.

TIP: Define the order so that the most important status terms appear before minor status terms, and also so that within terms of equal priority, status terms appear in the order they will be used in production.



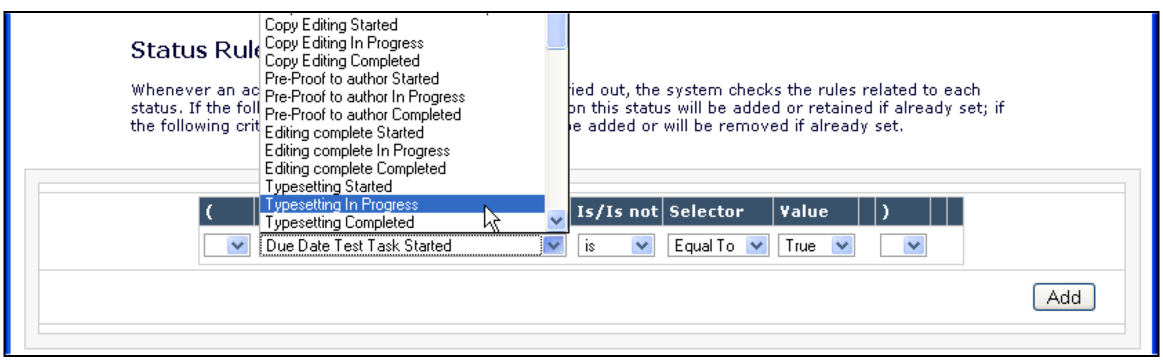
The *Edit Production Status* page allows you to define the rules that govern each status term, and rename or hide status terms. First, type the Production Status Term that will be assigned to submissions into the 'Production Status Name' field. Check the 'Record in History' box if this is an important status that you want to track and review on the *History* page. TIP: This can be used to give users who do not have access to the *Production Menu*, but can access *History*, an overview of a submission's progress.

Use the 'Status Rules' table at the foot of the page to define a set of conditions that the submission will be judged against whenever a Production Status check is triggered (moving into production; assigning, submitting or canceling production tasks).



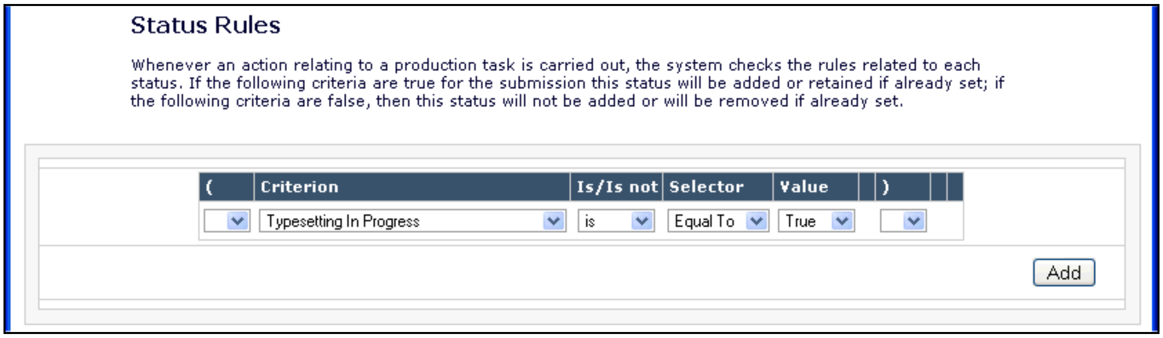
The 'Criterion' drop-down list provides a list of all currently active production tasks, in combination with three conditions that can be tested for each task:

- [Production Task] Started
- [Production Task] Completed
- [Production Task] In Progress



For each of these, the remaining columns allow you to create a term of the form:
'[Criterion] Is Equal to True/False' or 'Is Not Equal to True/False'

Example 1: the simplest type of production status term to create is the "With XXX" or "Task YYY in Progress" style of term, which appears when a particular task has been assigned and is being worked on – basically, when the submission is "out" with a supplier. To configure this type of production status term, use the '[Production Task] is In Progress' criterion, together with 'Is Equal To True'. Only a single term need be configured; this status term will automatically turn off when there are no production tasks of this type currently open – note that if you assign two or more tasks of this type at the same time, this rule will remain true until the last one is submitted or cancelled.



Use the 'Add' button to build up a more complex set of status rules; this allows you to check a combination of different production tasks when assessing whether the status term should be applied.

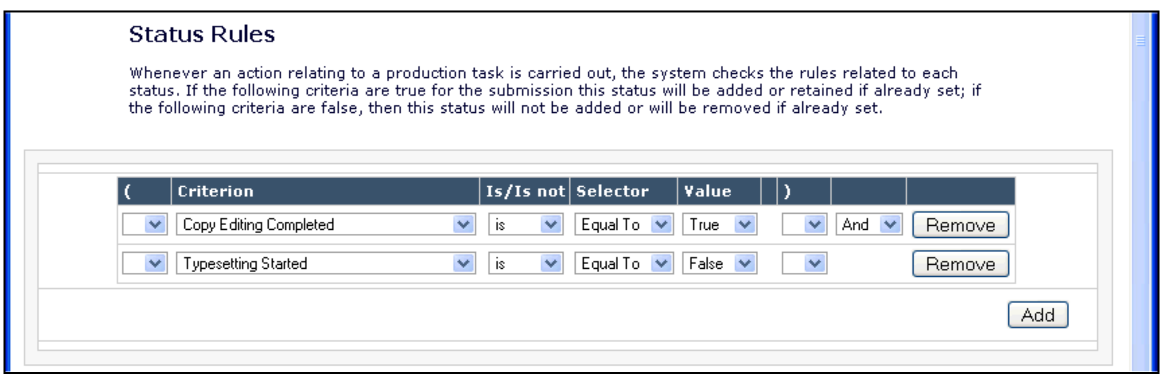
TIP: Use 'In progress' if you can; this is true when one or more tasks of the designated type are active; as soon as the task is completed, this term will automatically be removed.

Example 2: another common production status term is a 'Ready for X' style of status, which usually occurs when the submission is between two production tasks. For example, creating a 'Ready for Typesetting' status after copy-editing is completed but before Typesetting starts. To configure this type of production status term:

- Add a rule to check that all prerequisite tasks have ended
- Add a rule to check that the next task has not started

First, set the first Status rule to check whether the previous production task has been completed:

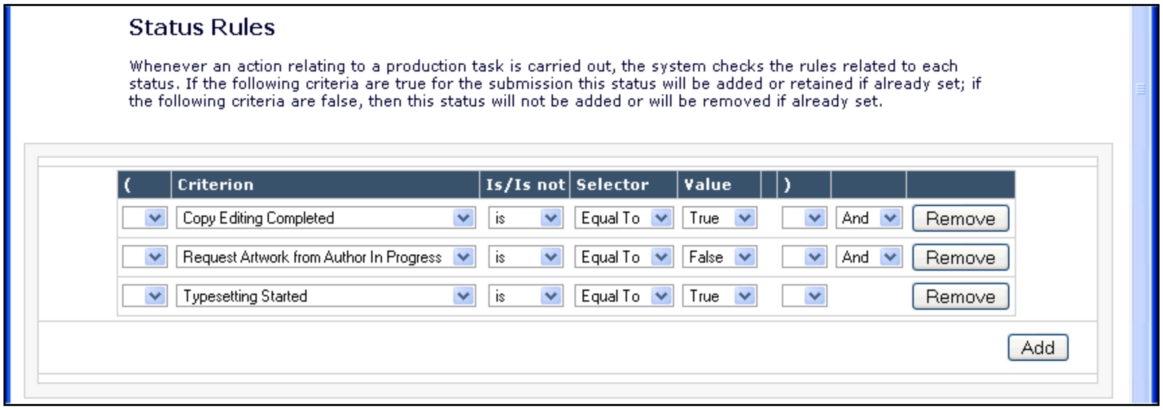
Second, add another rule to check you haven't already started typesetting. Use the "Add" button to add a second term.



At this point, this rule is saying "The submission is Ready for Typesetting when Copy-Editing is done, and we have never started Typesetting".

TIP: 'Completed' and 'Started' criteria are usually used in conjunction with other terms; you usually need a second rule to ensure the status term is 'turned off' by another task assignment. For any production task, 'Started' means 'At least one such task has ever been assigned'; this becomes true as soon as you assign the first such task and remains so even after you submit that task. Similarly, 'Completed' means 'At least one such task has ever been submitted’. These do not refer specifically to the task that triggers the check, but all tasks historically associated with the submission.

Optionally when configuring such a task, you can add additional terms to ensure that all production tasks that need to be completed before proceeding are covered with checks to ensure that they have been completed or are not in progress; here, we’re also checking that there is not a currently outstanding request for artwork with the Author:

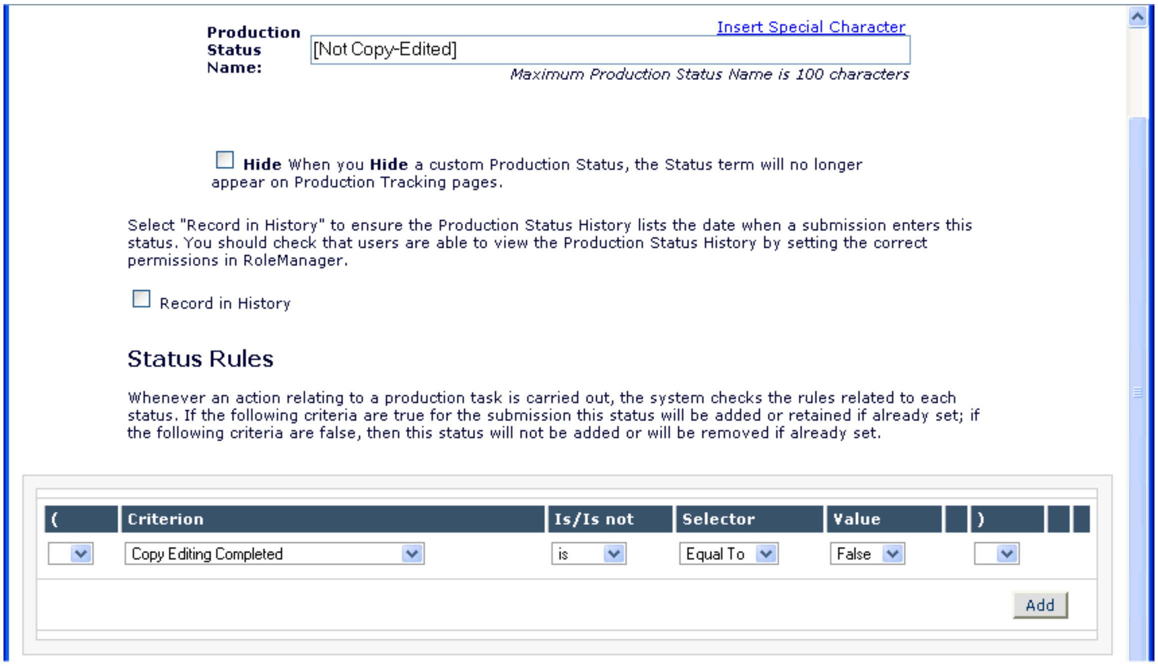


All of the above rules use the AND operator to ensure that all terms must be true at the same time for the Status term to be applied. Use the OR operator to define alternatives. Once you have more than two Status Rule terms defined, AND operators take precedence over OR operators. You can use the “(” and “)” parentheses drop-downs to group search terms together so they are evaluated first.

Example 3: Another type of status is the ‘check-off’ status, where terms describe key items that need to be checked off as completed. For example, you might want a submission to start with the three status terms:

[Not Copy-Edited]; [Not Set]; [Not Web Prepped]

Add a status term for each of these, with a single status rule to check that the associated task has never been completed.



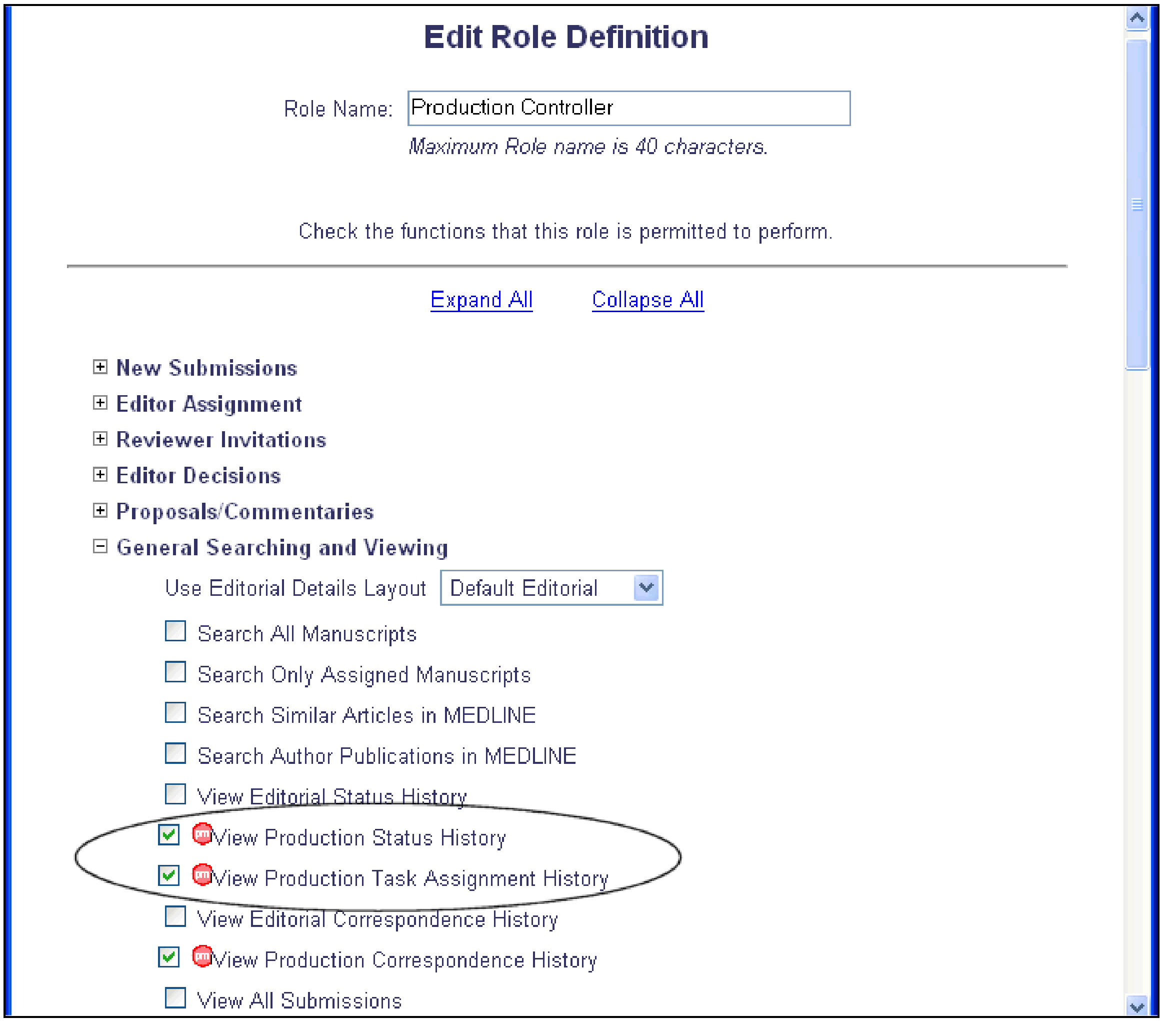
As soon as each referenced task is completed, the associated status term will disappear. Even if you restart Copy-Editing it will not reappear, because the first task still counts as completed.

In PM version 5.0, there is a single ‘View Production Status History’ permission for both Editor or Publisher roles, which governs whether users can see the list of previously assigned production tasks.

In version 6.0, the permissions are changed as follows:

1. The ‘View Production Status History’ label is unchanged, but the logic is changed to control whether Editors see the new production status terms (those configured with ‘Show In History’ box checked) in the *History*.
2. A new ‘View Production Task Assignment History’ permission controls whether Editors or Publishers can see the list of production task assignments in *History*, and on assigning production tasks, as per previous functionality.

NOTE: At time of upgrade, both permissions are set to match the version 5.0 setting for ‘View Production Status History’. If this is not desired, the System Administrator should modify the settings in RoleManager.


Edit Role Definition
Role Name:
Production Controller
Maximum Role name is 40 characters.
Check the functions that this role is permitted to perform.
Expand All
Collapse All
New Submissions
Editor Assignment
Reviewer Invitations
Editor Decisions
Proposals/Commentaries
General Searching and Viewing
Use Editorial Details Layout
Default Editorial
Search All Manuscripts
Search Only Assigned Manuscripts
Search Similar Articles in MEDLINE
Search Author Publications in MEDLINE
View Editorial Status History
View Production Status History
View Production Task Assignment History
View Editorial Correspondence History
View Production Correspondence History
View All Submissions

Production Task Assignment Totals Report

This new production tracking report provides a count of the production tasks assigned to users in a specified time period, broken down by Production Task type, to better assess their workload.

To run this report, click the Editor/Publisher Assignment Totals by Task Type Report link under the Preprint Manager Reports header on the *Reports Menu*.

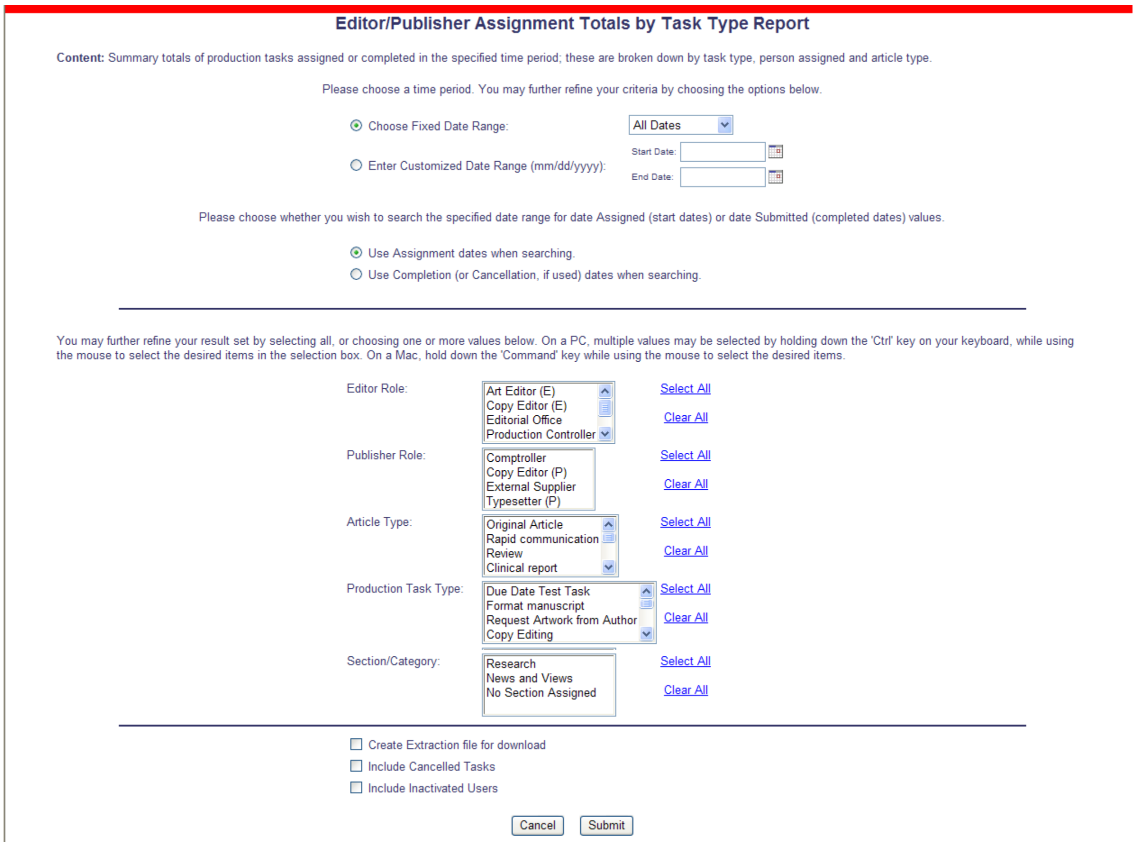
NOTE: User must have RoleManager permission to 'Produce Reports'.

The next step is to specify your selection criteria. This page includes many of the standard report options, including selection of date range, user role, article type and section/category. There are also several criteria options unique to this report:

- Use Date Assigned or Date Submitted:
  - 'Use Assignment dates when searching' – Selecting this option will return results based on Production Task Start date.
  - 'Use Completion (or Cancellation, if used) dates when searching' - Selecting this option will return results based on Production Task Completion date, or Cancellation date if the "Include Cancelled Tasks" option is set.
- Select Production Task Type – Limit your results to one, some, or all of the (not hidden) Production Tasks that are configured with the 'Can be Assigned to:' setting set to 'Selected Editor/Publisher Roles only'.
- Include Cancelled Tasks – If this box is checked, tasks that were subsequently cancelled will be incorporated into the totals in addition to completed tasks.
  - If the user has selected 'Use Assignment Dates when searching, this is based on the assignment date of the cancelled or completed task.
  - If the user has selected 'Use Completion (or Cancellation, if used) dates when searching', this is based on the cancellation date for cancelled tasks, or the submission date for completed tasks.

NOTE: The Editor Role and Publisher Role selection boxes list only the users with permission to 'Receive Production Tasks'.

NOTE: If an Administrator does not explicitly select any Editor Roles, Publisher Roles, Article Types, Production Task Types, or Sections/Categories, the report will return results for all Editor Roles, all Publisher Roles, all Article Types, all Production Task Types, and all Sections/Categories.



The main body of the report results contains a series of summary tables. Each table summarizes the data associated with a single Production Task Type (e.g. Format Mansuscript, Copy Editing, etc.). The Task Name is displayed as a sub-heading above the table.

Each row lists the totals for a specific combination of user and role associated with the task assignment. Editors and Publishers appear together in the same table. As this is the role that was associated with the task, it is possible for a specific user to appear twice – once with an Editor role, once with a Publisher role. Names are shown as links to the standard *People Information* page for that person. A column is added to the data area for each Article Type.

Editor/Publisher Assignment Totals by Task Type Report
Jan 01, 1999 – Dec 31, 2007

Summary totals of production tasks assigned in the specified time period.

Grand Totals

Due Date Test Task

Editor/Publisher	Role	Original Article	Rapid communication	Review	Clinical report	Letter to the Editor	Special Issue	Production Test	Companion file test	Companion
Arnolde Author-Three	Editorial Office	3	1	0	0	0	0	1	0	0
John MacJohn	Editorial Office	16	8	0	0	1	0	20	2	1
John MacJohn	Comptroller	16	8	0	0	1	0	20	2	1
John Test-editor	Test editor role	1	1	0	0	0	0	0	0	0
John Test-editor	Test publisher	1	1	0	0	0	0	0	0	0
Language Editor	Editorial Office	2	1	0	0	0	0	0	0	0
P. Rod Uction	Production Controller	1	2	0	0	0	0	4	0	0
	Totals:	40	22	0	0	2	0	45	4	2

Format manuscript

Editor/Publisher	Role	Original Article	Rapid communication	Review	Clinical report	Letter to the Editor	Special Issue	Production Test	Companion file test	Companion
Arnolde Author-Three	Editorial Office	3	1	0	0	0	0	1	0	0
John MacJohn	Editorial Office	16	8	0	0	1	0	20	2	1
John MacJohn	Comptroller	16	8	0	0	1	0	20	2	1
Language Editor	Editorial Office	2	1	0	0	0	0	0	0	0
P. Rod Uction	Production Controller	1	2	0	0	0	0	4	0	0
	Totals:	38	20	0	0	2	0	45	4	2

Request Artwork from Author

No Production Tasks of this type match the selection criteria.

TO CONFIGURE: No configuration is required. However, the user must have Editor RoleManager permission to 'Produce Reports'.

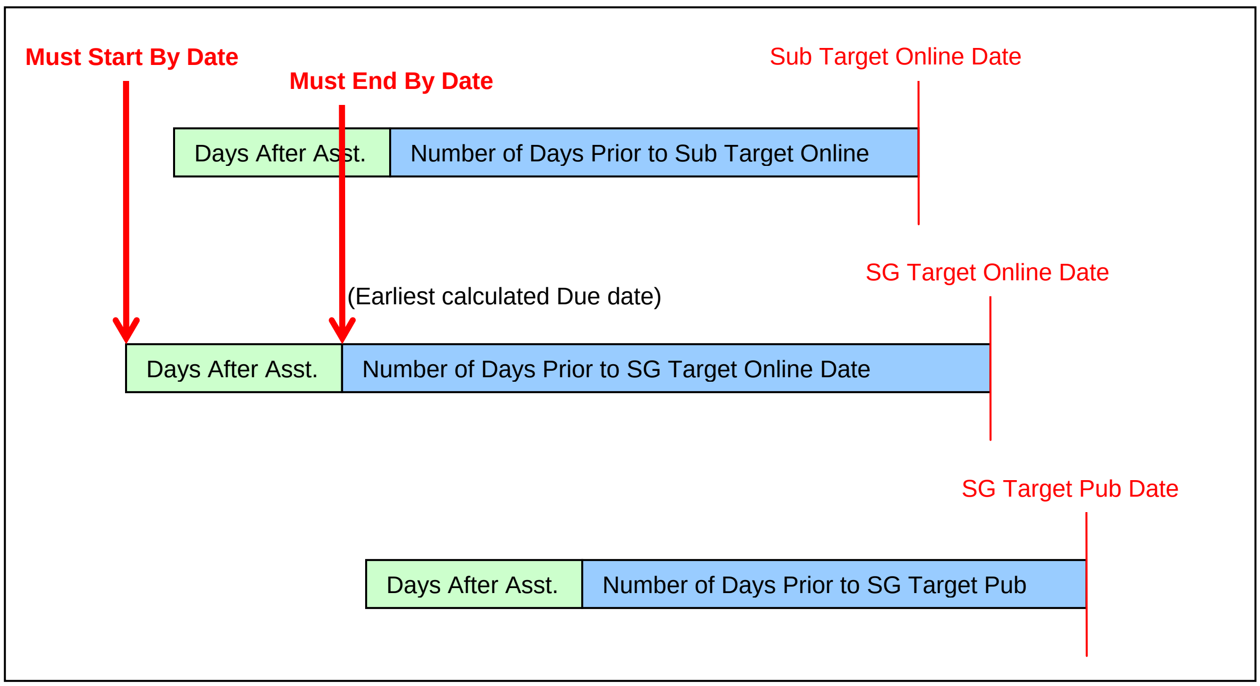
Must Be Started By Date and "At Risk" Folder for Production Tracking

In version 5.0 of Preprint Manager, Production Tasks can be configured to calculate a due date on assignment based on several options, such as 'Number of Days After Assignment', 'Number of Days prior to Schedule Group Target Publication Date', etc. However, these calculations are used at the point of assignment only to calculate the due date for the current Task Assignment and warn of missed deadlines.

In PM version 6.0, the 'Must Start By Date' and 'At Risk' folder functionality uses the same lead times to calculate deadlines in advance for important tasks, provides visibility to the dates in the status grid, compares individual production task assignments against these master dates, and automatically lists all submissions which are at risk of missing a target publication date in a new *'At-Risk' Submissions* folder.

To use this functionality, you must identify the production task types you wish to include in these 'Must Start Date' and 'At Risk' calculations. PM will then build a master schedule for each submission behind the scenes, calculating new 'Must Start By' and 'Must End By' dates for each selected Production Task Type.

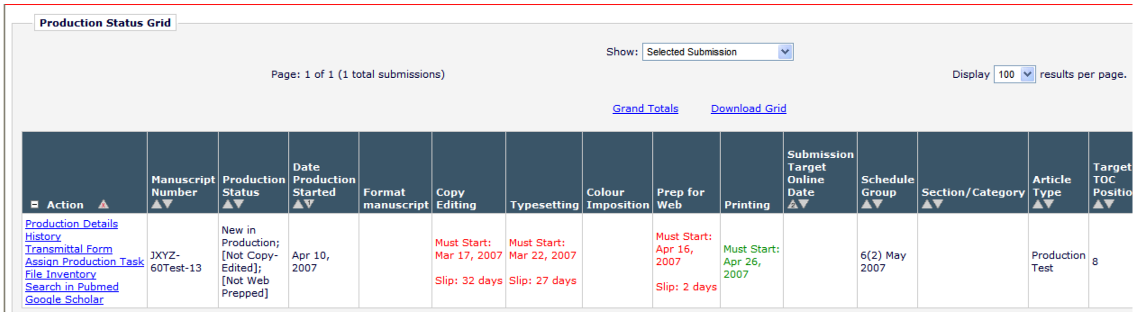
Below is a chart illustrating how 'Must Start By' and 'Must End By' dates are used in forward scheduling.



NOTE: This will **not** affect existing submissions; only submissions which are put into production **after** the change in configuration will have a schedule built for them that incorporates the newly configured tasks. You can force the system to rebuild the schedule for a submission by Ending Production on the submission, then returning the submission to production.

The Production Status Grid is enhanced to show scheduling information for those production tasks configured to display the 'Must Start:' date and schedule 'Slip'. Where no assignment has been made for a Production Task Type configured to display the 'Must Start:' date, the Production Status Grid will show a 'Must Start:' date for that task. The warning is color coded, displaying green if the date is in the future, amber if the date is today's date, and red if the date has passed. If the date has passed, then the column will also show a 'Slip:' figure indicating the number of days past due for this task.

16849


Production Status Grid

Show: Selected Submission

Page: 1 of 1 (1 total submissions)

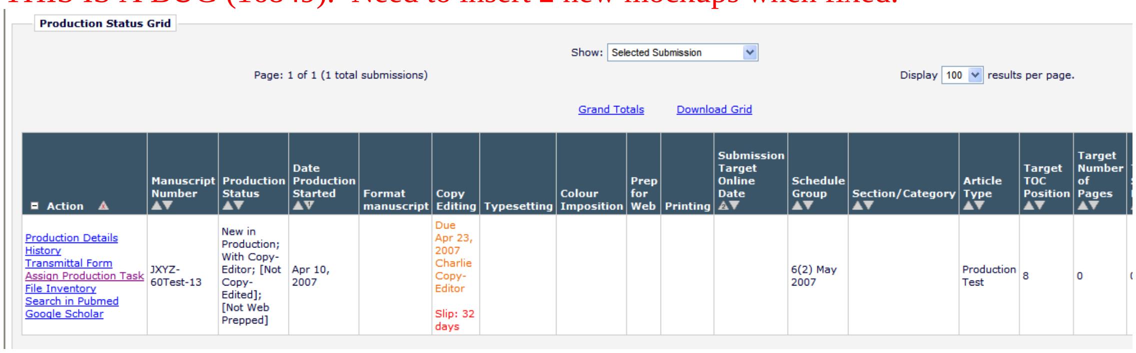
Display 100 results per page.

Grand Totals   Download Grid

Action	Manuscript Number	Production Status	Date Production Started	Format manuscript	Copy Editing	Typesetting	Colour Imposition	Prep for Web	Printing	Submission Target Online Date	Schedule Group	Section/Category	Article Type	Target TOC Positio
Production Details History Transmittal Form Assign Production Task File Inventory Search in Pubmed Google Scholar	JXYZ-60Test-13	New in Production; [Not Copy-Edited]; [Not Web Prepped]	Apr 10, 2007		Must Start: Mar 17, 2007 Slip: 32 days	Must Start: Mar 22, 2007 Slip: 27 days		Must Start: Apr 16, 2007 Slip: 2 days	Must Start: Apr 26, 2007		6(2) May 2007		Production Test	8

If a production task has been assigned, the 'Must Start:' date is replaced with the existing 'Submitted', 'Due:' or 'Cancelled' information. The system still tracks whether that task assignment is slipping against the scheduled dates for that task type, and will now also display a 'Slip:' figure indicating the number of days late the task is running:

THIS IS A BUG (16849). Need to insert 2 new mockups when fixed.


Production Status Grid

Show: Selected Submission

Page: 1 of 1 (1 total submissions)

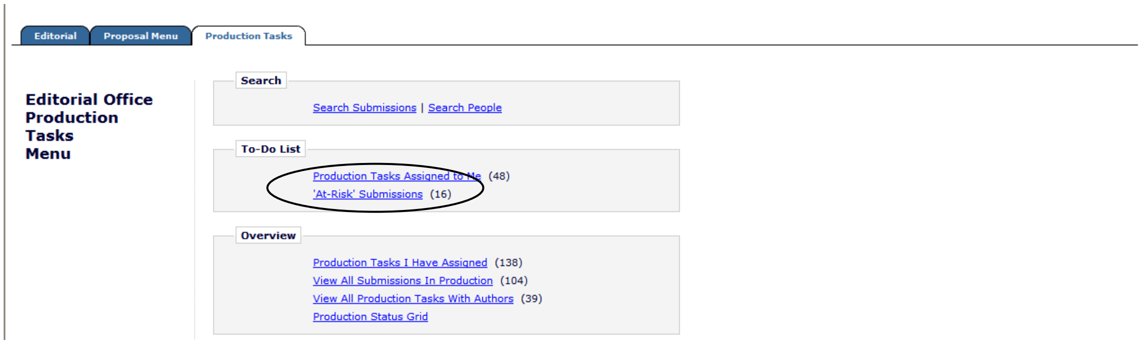
Display 100 results per page.

Grand Totals   Download Grid

Action	Manuscript Number	Production Status	Date Production Started	Format manuscript	Copy Editing	Typesetting	Colour Imposition	Prep for Web	Printing	Submission Target Online Date	Schedule Group	Section/Category	Article Type	Target TOC Position	Target Number of Pages
Production Details History Transmittal Form Assign Production Task File Inventory Search in Pubmed Google Scholar	JXYZ-60Test-13	New in Production; With Copy-Editor; [Not Copy-Edited]; [Not Web Prepped]	Apr 10, 2007		Due Apr 23, 2007 Charlie Copy-Editor Slip: 32 days						6(2) May 2007		Production Test	8	0

- If the task is open (assigned and not submitted), the Slip figure will be based on the larger of the number of days later than the 'Must End By' date the Due date currently is, or the number of days past the 'Must End By' date the current date is if later than the Due date.
- If the task has been submitted, the Slip: figure will be based on the number of days later than the 'Must End By:' date the task was completed by.
- Cancelled tasks do not contribute to the schedule slip.

A new *'At-Risk' Submissions* folder is added to the main Production Tasks Menu. This folder is displayed for Editor and Publisher Roles with the new permission to 'View At-Risk Submissions'.



The ‘At Risk’ folder is based on the concept of an overall Submission Slip figure. When calculating this, the system takes into consideration all of the individual ‘Slip:’ figures calculated as described above. All production task types configured with ‘Include this task in 'At Risk' and 'Must Start By' date display’ contribute to this calculation, not just those that appear on the Production Status Grid – this is important to note, as you can keep the Production Status Grid simple, but still monitor other tasks and use them to trigger a warning if they threaten the schedule. You may also see submissions in the *‘At-Risk’ Submissions* folder where no Slip: dates appear on the Status Grid.

The total Submission Slip is taken to be the largest of:

- The last completed production task (only the latest task is counted, so you can recover from early task slips by completing subsequent tasks early).
- The largest individual slip figure from any open production task assignments.
- The largest slip figure calculated for Production Task types with no associated assignments, where the current date is past the ‘Must Start Date’ for that task.

IMPORTANT NOTE: The Must Start By and Must End By dates, and the associated task Slip and Schedule Slip figures rely on lead times derived from Submission Target Online Publication Date, Schedule Group Target Online Publication Date and Schedule Group Target Publication Date.

If the submission is not assigned to a schedule group, or does not have a Submission Target Online Publication date, then no ‘Slip:’ figures can be calculated and the submission cannot be put ‘At Risk’ – this is because the system has no date to schedule to.

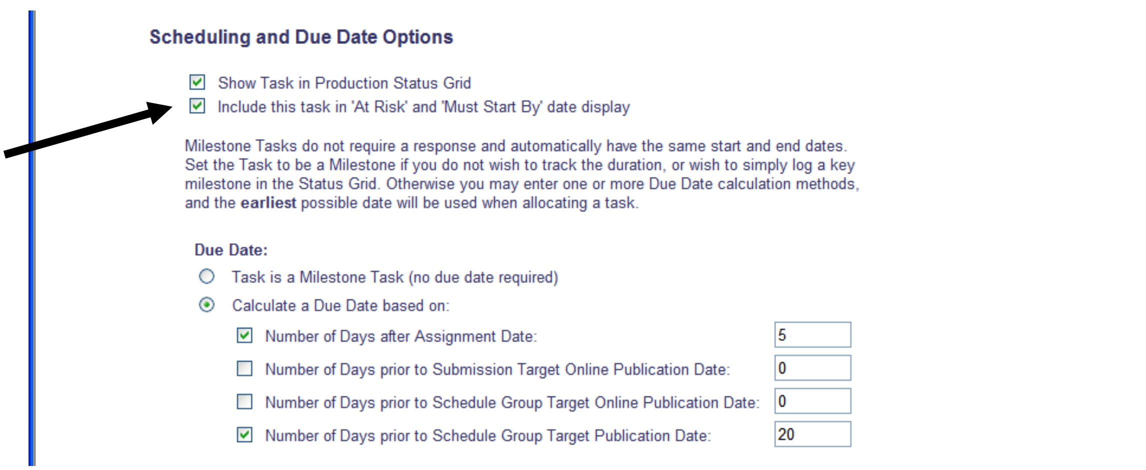
You can deal with schedule slip in a variety of ways, if appropriate:

- For individual tasks, bring the Due Date forward on or after assignment.
- For a specific submission, edit the Submission’s Target Online Publication Date (defer online publication of that submission)
- For a specific submission, reassign it to a later Schedule Group.
- For all submissions in a Schedule Group, edit the Schedule Group’s target Online Publication Date or Target Publication Date (defer publication of the issue).

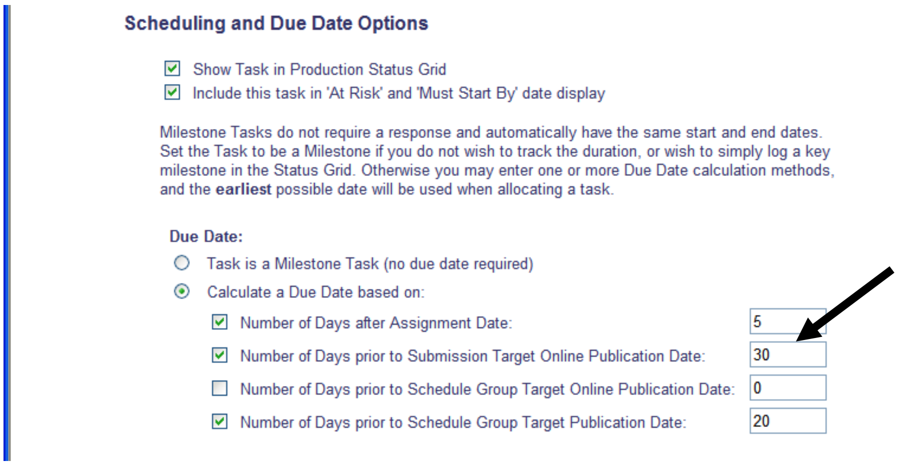
TO CONFIGURE: Go to PolicyManager and click Configure Production Tasks to list the production tasks, and identify the most important tasks, which you wish to include in your forward scheduling. These are likely to be the tasks already selected to display on the Production Status Grid. For each type of Production Task you want to include in scheduling calculations, check the 'Include this task in 'At Risk' and 'Must Start By' date display' configuration option.

You must also set at least one of the 'Number of Days Prior to …' Due Date options. It is recommended that you also set the Number of Days After Assignment Date option. If you select more than one of the 'Number of Days Prior to …' options, the system will calculate the earliest 'Must End By' due date based on all checked 'Number of Days prior …' options; it then adds the 'Number of Days after Assignment' option to calculate the associated 'Must Start By' date.

Example 1: In the example below, let's assume that the Schedule Group Target publication Date is June 30. Twenty days prior to June 30 is June 10; June 10 is the 'Must End By Date'. We know that the task should take 5 days to complete. So the 'Must Start By Date' is 5 days before June 10, or June 5. Note: If the journal is using Working Days to calculate due dates, these calculations would be based on working days, not calendar days. If the Author hasn't started working on the task by June 5, or hasn't completed the task by June 10, the submission is considered 'At Risk'.



Example 2: Building on the previous example, let's assume the Submission Target Online Publication Date is June 15 (Schedule Group Target Publication Date is still June 30). Now, the 'Must End By' date would be May 16 (30 days prior to June 15), because we take the *earliest* of dates. The new 'Must Start By Date' is 5 days before May 16, or May 11.



NOTE: If you define the task types to be included in Must Start By date calculations, any person who can see the Status Grid will see the Must Start By dates and Slip information.

NOTE: You can configure some task types with 'Include this task in 'At Risk' and 'Must Start By' date display' set, but then do not set the 'Show Task in Production Status Grid' option. The system will still continue to calculate the above schedule slip figures for these task types, but will not display them on the Production Status Grid. They will be used to determine whether the submission is 'At Risk' as described below.

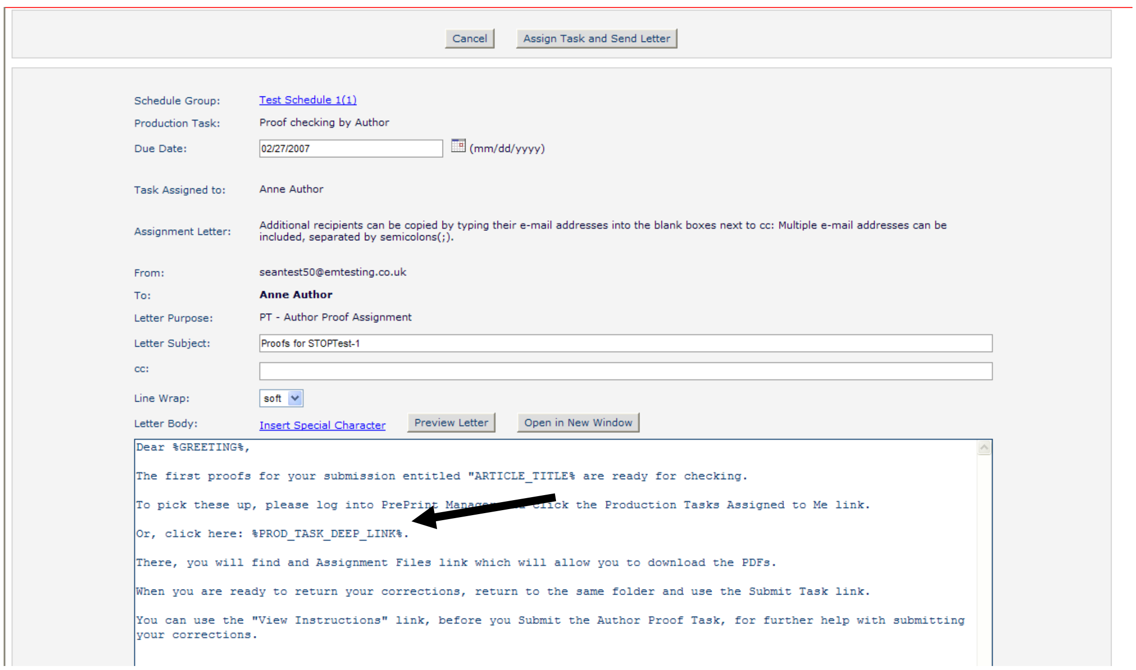
To give Editor and Publisher Roles access to the new *At-Risk Submissions* folder, go to RoleManager and enable the new permission.

Author Deep-Link for Production Tasks

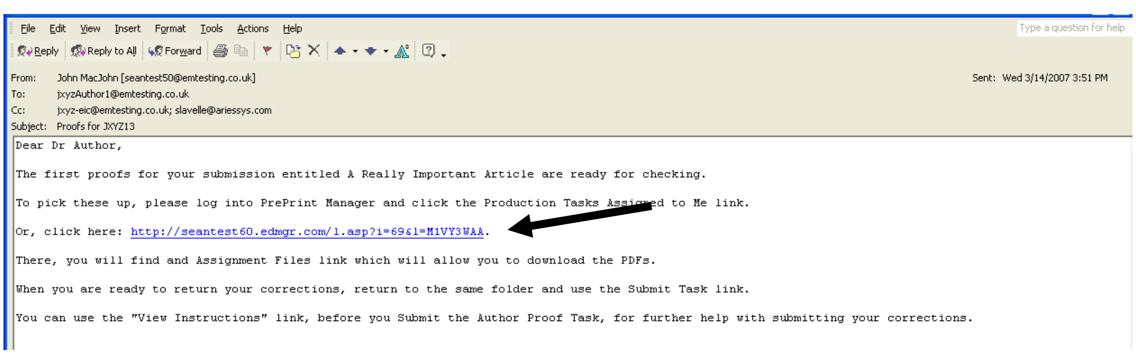
In EM version 5.0, the system supports ‘deep-links’, which are mail-merge fields included in letter templates that insert a task-specific URL into e-mail correspondence. Clicking on the URL in the e-mail automatically logs the recipient into the system or carries out a specific action (such as accepting a review).

This functionality is extended to the production tracking feature; providing a new deep-link for use with Author production task assignments. This deep-link simplifies Author interaction with the system; bringing them directly to the publication’s PM website.

Administrators can type the new %PROD_TASK_DEEP_LINK% mail-merge field into Author Production Task Assignment letter templates.

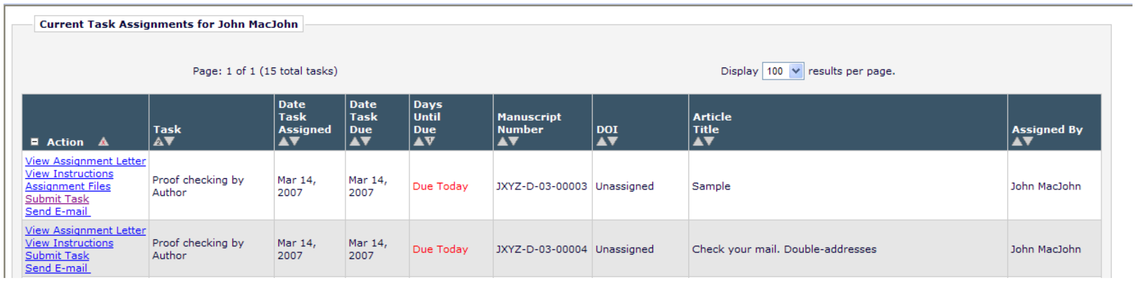


When a production task is assigned to an Author, or a Production Task Reminder letter is sent, the merge field is converted to a URL that the user can click on, or copy and paste into a browser.

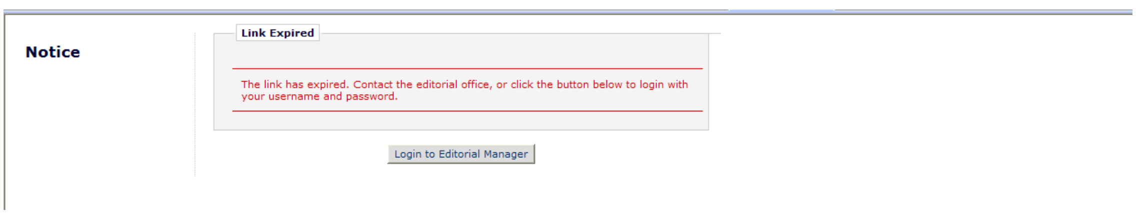


NOTE: If the letter is specified in PolicyManager as HTML Format, the formatted e-mail the deep link appears as the hyperlinked text Production Task Assignment.

Clicking the URL takes the Author directly to the *Current Task Assignments* page, where he can carry out activities related to the assigned task.

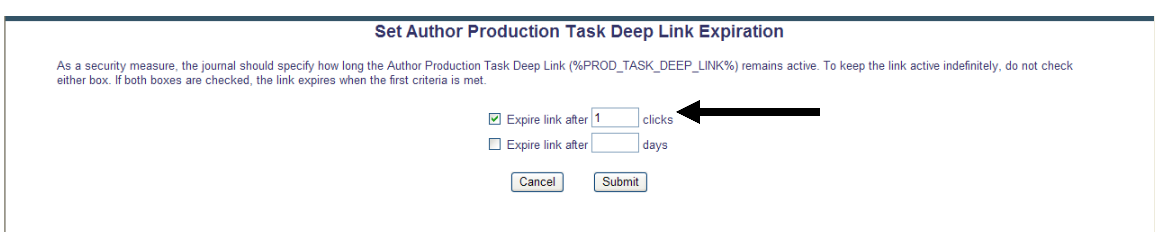


The URL is encoded to be unique to an Author's particular task assignment, and will expire according to the publication's policy after a default number of clicks and/or a default number of days.

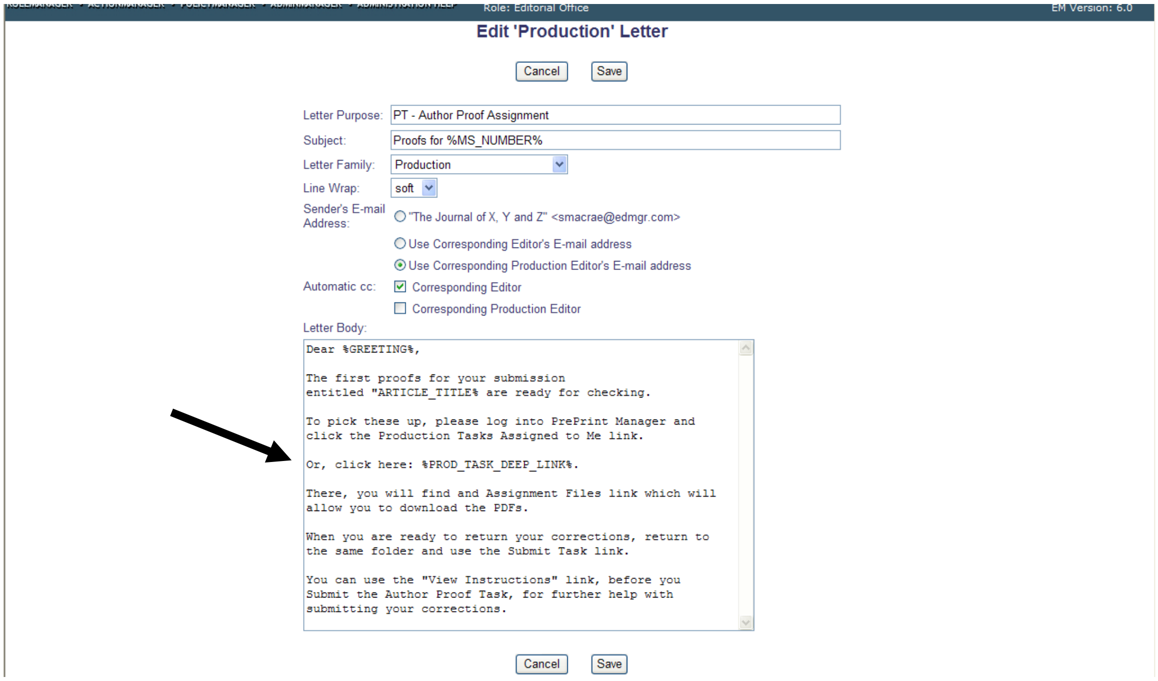


TO CONFIGURE: In PolicyManager, click the Set Author Production Task Deep Link Expiration link under the Preprint Manager heading of Policy Manager. Then specify the expiration policy for the Author Production Task deep link (i.e. how long the link is active):

- At time of upgrade, the option 'Expire link after 1 clicks' is selected.
- If neither option is selected (both boxes are unchecked), the deep link will remain active indefinitely, even if the production task has been completed.



The new merge field %PROD_TASK_DEEP_LINK% should only be used in Author Production Task Assignment or Author Production Task Reminder letters that have a 'Production' or 'Production Reminder' letter family. To insert this deep link in a Production Task Assignment or Author Production Task Reminder letter template, go to the *Edit Letters* page in PolicyManager and modify the appropriate letter.


Role: Editorial Office
EM Version: 6.0
Edit 'Production' Letter
Cancel
Save
Letter Purpose:
PT - Author Proof Assignment
Subject:
Proofs for %MS_NUMBER%
Letter Family:
Production
Line Wrap:
soft
Sender's E-mail Address:
"The Journal of X, Y and Z" <smacrae@edmgr.com>
Use Corresponding Editor's E-mail address
Use Corresponding Production Editor's E-mail address
Automatic cc:
Corresponding Editor
Corresponding Production Editor
Letter Body:
Dear %GREETING%,
The first proofs for your submission
entitled "ARTICLE_TITLE% are ready for checking.
To pick these up, please log into PrePrint Manager and
click the Production Tasks Assigned to Me link.
Or, click here: %PROD_TASK_DEEP_LINK%.
There, you will find and Assignment Files link which will
allow you to download the PDFs.
When you are ready to return your corrections, return to
the same folder and use the Submit Task link.
You can use the "View Instructions" link, before you
Submit the Author Proof Task, for further help with
submitting your corrections.
Cancel
Save

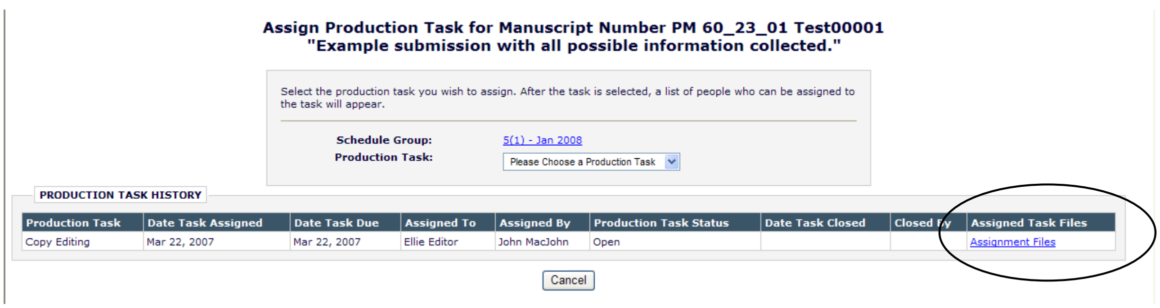
Include File Information on Production Task History and File Downloaded Indicator

This enhancement provides increased visibility for the files assigned with each individual production task, to help ensure the correct material is being worked on. Users can also see whether an Author or Supplier has accessed the files associated with a production task assignment, and is therefore most likely working on the assignment.

A new 'Assigned Task Files' column is added to the Production Task History section of the *Assign Production Task* page. This column displays an Assignment Files link for all production tasks where production task assignment files were selected on assignment and/or uploaded upon completion.

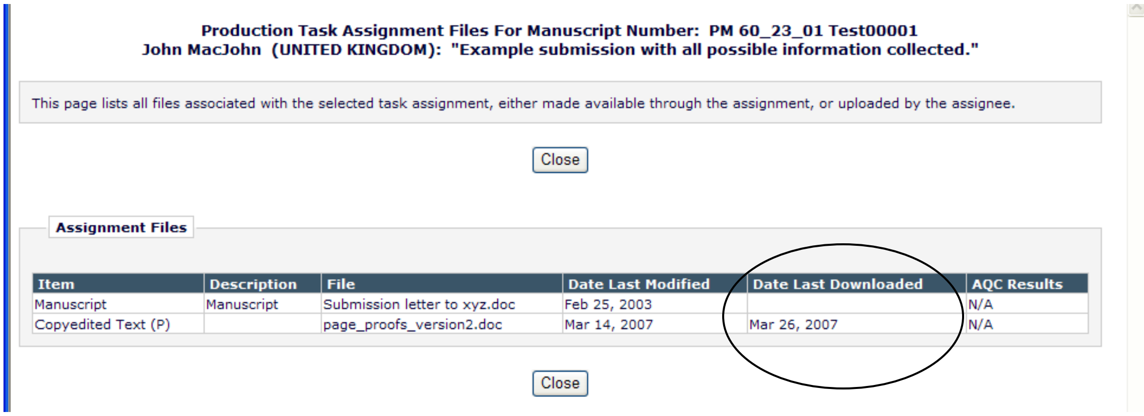
NOTE: The Assignment Files link is displayed if any one of the following conditions has been met:

- An Editor selects the 'Allow Download' option for submission files and companion files when assigning a production task from the *Assign Production Task* page.
- Companion files have been uploaded to a production task by an Editor from the *Assign Production Task* page.
- Users assigned to a production task have uploaded companion files from the *Submit Production Task* page.



Clicking the Assignment Files link opens a pop-up window showing the following information:

- A list of the submission files and companion files (Production Task Assignment Files) associated with a task made available through selection on task assignment.
- A new 'Date Last Downloaded' column indicates whether the file has been downloaded as part of the task.
- A list of the companion files uploaded by the task assignee upon task completion.



Production Task Assignment Files For Manuscript Number: PM 60_23_01 Test00001
John MacJohn (UNITED KINGDOM): "Example submission with all possible information collected."

This page lists all files associated with the selected task assignment, either made available through the assignment, or uploaded by the assignee.

Close

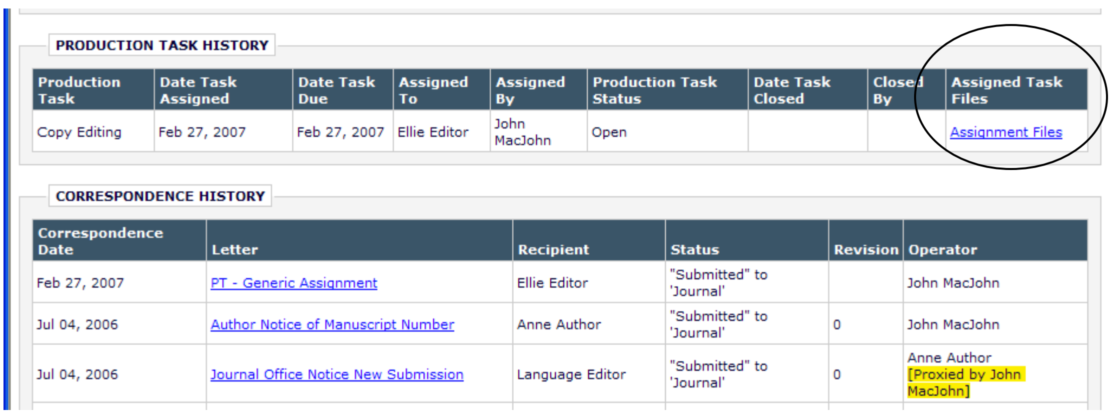
Assignment Files

Item	Description	File	Date Last Modified	Date Last Downloaded	AQC Results
Manuscript	Manuscript	Submission letter to xyz.doc	Feb 25, 2003		N/A
Copyedited Text (P)		page_proofs_version2.doc	Mar 14, 2007	Mar 26, 2007	N/A

Close

NOTE: ‘Date Last Downloaded’ displays the most recent date on which the assignee logged in and downloaded any submission files or companion files through the *Assignment Files* page and *Submit Production Task* pages. The presence of the date indicates that the assignee has accessed the files at least once. If there is no date shown, the file has not been accessed by the assignee.

The ‘Assigned Task Files’ column is also added to the Production Task History section of the *History* page. Clicking the Assignment Files link functions as described above.



PRODUCTION TASK HISTORY

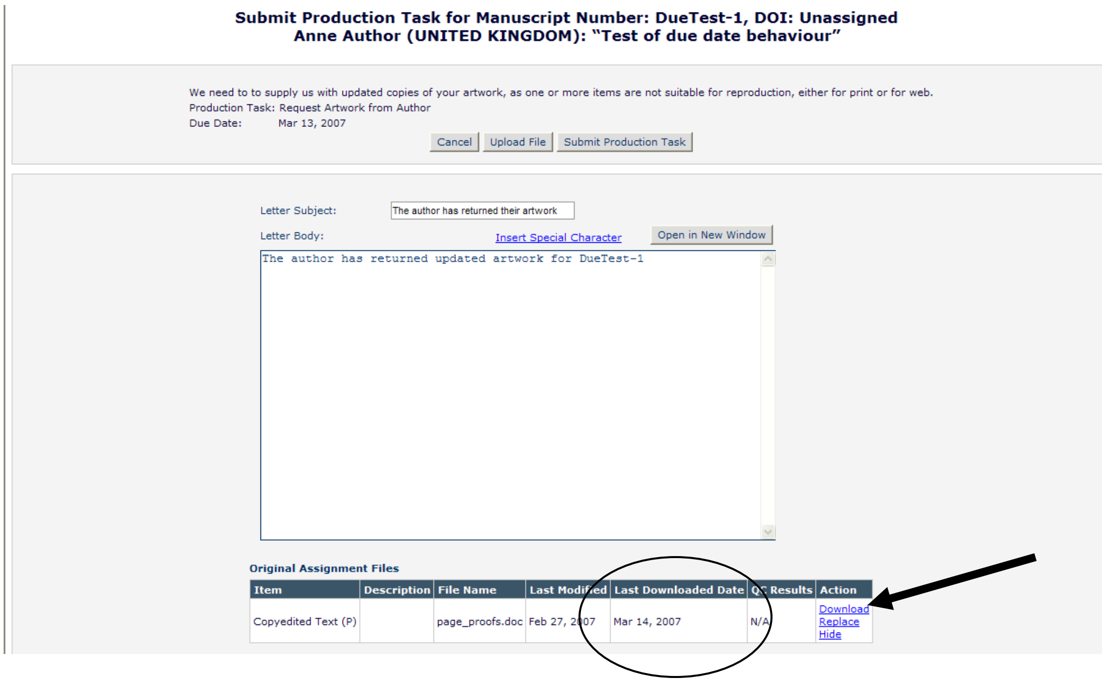
Production Task	Date Task Assigned	Date Task Due	Assigned To	Assigned By	Production Task Status	Date Task Closed	Closed By	Assigned Task Files
Copy Editing	Feb 27, 2007	Feb 27, 2007	Ellie Editor	John MacJohn	Open			Assignment Files

CORRESPONDENCE HISTORY

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Feb 27, 2007	PT - Generic Assignment	Ellie Editor	"Submitted" to 'Journal'		John MacJohn
Jul 04, 2006	Author Notice of Manuscript Number	Anne Author	"Submitted" to 'Journal'	0	John MacJohn
Jul 04, 2006	Journal Office Notice New Submission	Language Editor	"Submitted" to 'Journal'	0	Anne Author [Proxied by John MacJohn]

Per current functionality, users continue to see the Assignment Files action link in the *Current Task Assignments* folder. The target page is the enhanced *Assignment Files* page described above.

On the *Submit Task* page, the new ‘Last Downloaded Date’ column is displayed. If a user clicks the Download link, the ‘Date Last Downloaded’ value is updated with the current date.



The 'Date Last Downloaded' column is also added to the following pages:

- *Production Tasks I Have Assigned*
- *View All Production Tasks with Authors*

TO CONFIGURE: No configuration is necessary. All users who have the *View Production Task History* permission enabled for their Editor Role in Role Manager are able to view the summary of Production Task Assignment Files via the Assignment Files link.