CONFIDENTIAL AND PROPRIETARY

Aries Systems Corporation

Editorial Manager/Preprint Manager
6.1 Release Notification

Subject to Change

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EDITORIAL MANAGER/PREPRINT MANAGER 6.1 RELEASE NOTIFICATION

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GENERAL ENHANCEMENTS
Automatic Reviewer Role Assignment for New Registrations

In current functionality, when new users register for Editorial Manager they are not automatically assigned a Reviewer Role. Office administrators must go to the Search People – Update Information page after the fact, mark the person “Available as a Reviewer” and then assign a Reviewer Role, so that the new user is available to Editors for peer review selection.

Under new functionality, publications may elect to have a Reviewer Role be automatically assigned when new users register for EM. If this feature is enabled, all new user registrations will automatically be assigned to the Reviewer Role designated in PolicyManager and marked “Available as a Reviewer”. This setting applies to self-registered users, proxy-registered users, imported users, and Corresponding Author registrations.

When this feature is enabled, users will no longer see the question: “Available as a Reviewer?” on the Registration page. Instead, they will automatically be marked as “Available to Review” and assigned the Reviewer Role specified in PolicyManager. All of this is transparent to the user.

NOTE: The “Available as Reviewer?” question is also suppressed on the Update my Information page, but remains visible on the Search People – Update Information page accessed by Editor Roles with appropriate RoleManager permission.

Similarly, when the editorial office proxy-registers a new user, the person is automatically assigned to the Reviewer Role specified in PolicyManager. Note the Reviewer Role can still be changed on this page (to another Role or to ‘None’).
NOTE: Existing users (i.e. people who were registered before the new feature is enabled in version 6.1) are not automatically given a Reviewer Role when this option is activated.

TO CONFIGURE:

Go to PolicyManager and click the new Enable Automatic Reviewer Role Assignment link in the ‘Registration and Login Policies’ section. To enable Automatic Reviewer Role Assignment, select the radio button next to ‘Automatically Assign Reviewer Role on Registration:’ and then choose a role from the drop-down list.

FOR IJRS (Inter-Journal Resource Sharing) LINKED PUBLICATIONS:
When a user registers (or is registered) in one database, all publications in the IJRS group are updated with the new user record. When IJRS syncing occurs, any records not
currently in one of the IJRS publications will be automatically imported. Upon import into a publication with the “Automatically Assign Reviewer Role” option selected, the selected Reviewer Role is automatically assigned to the new record in the publication.
Hide Manuscript Submission Interface

In PM version 6.0, there is an Author RoleManager permission ‘Hide Submission Interface’ (Production Tracking customers only). Publications that use Preprint Manager for production tracking, but do not use Editorial Manager for manuscript submission, would use this option so that Authors do not see extraneous folders on the Main Menu. When this permission is enabled, the only folders visible to Authors on the Author Main Menu are Current Task Assignments and Completed Production Task Assignments.

New in EM/PM version 6.1, this feature is made available to all customers of EM/PM. In addition to the ‘Hide Submission Interface’ permission being made available to all users, this permission is further enhanced so that the entire Author Main Menu can be displayed to the Author, except for the Submit New Manuscript link. This allows the Author to submit invited manuscripts, but not unsolicited manuscripts. This feature is turned off when the publication upgrades to version 6.1, and must be configured as described below.

TO CONFIGURE:

To hide the Submit New Manuscript link on the Author Main Menu, go to Author RoleManager and select the checkbox ‘Hide Manuscript Submission Interface’.

NOTE: Authors on EM-only publications will see a blank menu if this option is selected without the sub-option selected as well.

To Hide the Submit New Manuscript link while allowing the other Author Main Menu folders to appear, select both the ‘Hide Manuscript Submission Interface’ permission and the ‘Display Invited Manuscript Folders’ permission and click the ‘Submit’ button to save your changes.
Edit Role Definition

Role Name: Author

Check the functions that this role is permitted to perform.

- [ ] View Status Date
- [ ] View Current Status
- [ ] Send Ad Hoc E-mail
- [ ] Search Similar Articles in MEDLINE
- [ ] Display "Alternate Contact Information" Link on Main Menu
- [ ] Display "Unavailable Dates" Link on Main Menu
- [ ] Hide Manuscript Submission Interface
  - [ ] Display Invited Submission Folders
- [ ] Order Electronic Reprints
- [ ] View WebFirst Pages
  - [ ] View Subscriber Version of WebFirst
  - [ ] View Pay-per-View Version of WebFirst
- [ ] View Reference Checking Results

[ Cancel ] [ Submit ]
For EM Publications with both options selected, Authors will see the following *Author Main Menu*:

<table>
<thead>
<tr>
<th>Invited Submissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>My New Invitations (1)</td>
</tr>
<tr>
<td>My Accepted Invitations (5)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Submissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submissions Sent Back to Author (2)</td>
</tr>
<tr>
<td>Incomplete Submissions (41)</td>
</tr>
<tr>
<td>Submissions Waiting for Author's Approval (10)</td>
</tr>
<tr>
<td>Submissions Being Processed (39)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Revisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submissions Needing Revision (5)</td>
</tr>
<tr>
<td>Revisions Sent Back to Author (1)</td>
</tr>
<tr>
<td>Incomplete Submissions Being Revised (6)</td>
</tr>
<tr>
<td>Revisions Waiting for Author's Approval (0)</td>
</tr>
<tr>
<td>Revisions Being Processed (5)</td>
</tr>
<tr>
<td>Declined Revisions (1)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submissions with a Decision (44)</td>
</tr>
</tbody>
</table>

For EM/PM or just PM Publications with both options selected, Authors will see the following *Author Main Menu*:

<table>
<thead>
<tr>
<th>Production Task Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Task Assignments (5)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Invited Submissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>My New Invitations (1)</td>
</tr>
<tr>
<td>My Accepted Invitations (5)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Submissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submissions Sent Back to Author (2)</td>
</tr>
<tr>
<td>Incomplete Submissions (41)</td>
</tr>
<tr>
<td>Submissions Waiting for Author's Approval (10)</td>
</tr>
<tr>
<td>Submissions Being Processed (39)</td>
</tr>
</tbody>
</table>

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<tr>
<th>Revisions</th>
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<tbody>
<tr>
<td>Submissions Needing Revision (5)</td>
</tr>
<tr>
<td>Revisions Sent Back to Author (1)</td>
</tr>
<tr>
<td>Incomplete Submissions Being Revised (6)</td>
</tr>
<tr>
<td>Revisions Waiting for Author's Approval (0)</td>
</tr>
<tr>
<td>Revisions Being Processed (5)</td>
</tr>
<tr>
<td>Declined Revisions (1)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submissions with a Decision (44)</td>
</tr>
<tr>
<td>Completed Production Task Assignments (6)</td>
</tr>
</tbody>
</table>
Author Questionnaires

In EM version 6.0, the Administrator can create Custom Submission Questions ("Questions") in PolicyManager that Authors will see at the ‘Additional Information’ submission step when submitting a manuscript. In current functionality:

- Questions can be configured to ‘Display’ or be ‘Hidden’ on a per Article Type basis, for both New Submissions and Revised Submissions (Set “Additional Information” Preferences on the Edit Article Type page).
- Questions can be configured to display on the Transmittal Form, and/or in the Search/Manage Conference Submissions interface.
- Questions are configured as ‘Optional’ or ‘Required’ for Authors when submitting a manuscript, and/or on the Transmittal Form. This particular setting is not currently configurable on a per Article Type basis.

In EM version 6.1, this feature is improved significantly, giving publications the utmost flexibility in determining the information to be collected from Authors at the ‘Additional Information’ submission step. This is achieved with the introduction of a new concept – the ‘Author Questionnaire’ (“Questionnaire”). A Questionnaire is comprised of any number of Questions from a customized ‘master list’ of Custom Submission Questions.

To implement a Questionnaire, the Administrator would:
1. Create a ‘master list’ of Questions (or modify the existing set of Custom Submission Questions used in version 6.0)
2. Correlate the Questions with one or more Questionnaires
3. Apply the Questionnaire(s) to one or more Article Types

This allows the publication to collect different pieces of information from Authors for different Article Types, and customize the parameters for the responses (i.e. Author’s answers to the questions):

1. Response Type (e.g. Text, Date, Integer, Decimal, Notes, or List)
2. A ‘List’ Response Type can be further customized to be a drop-down list box, radio buttons, checkboxes, or a scrollable selector box.
3. Default values and/or default text for Author’s response
4. Maximum field length for responses (i.e. character count)
5. Whether an answer is Required or Optional for Author submission
6. Customized instructions for the Author response
7. Whether or not a Question and response are displayed on the Manuscript Details page
8. Whether or not a Question and response are displayed, can be edited and/or is required on the Transmittal Form

Example 1: Sample page an Author might see for Questions configured with ‘Text’, ‘Date’, and ‘Integer’ Response Types.
Example 2: Sample page an Author might see for Questions configured with ‘Decimal’, ‘Notes’, and ‘Drop-down List’ Response Types:

Example 3: Sample page an Author might see for Questions configured with ‘Radio Button List’, ‘Checkbox List’, and ‘Selector Box List’ Response Types:
Authors are required to enter their responses in the proper formats as defined in PolicyManager.
Example 4: A sampling of response formatting errors made by the Author, and the error text shown.
Example 5: Another sampling of response formatting errors made by the Author, and the error text shown.

NOTE: If a Question is required for submission, and the Author does not respond in the proper format, he can proceed to other submission steps but will not be allowed to build the submission PDF (the final submission step) without answering all Questions in the proper format.

Once a manuscript has been successfully submitted to the editorial office, Editor Roles have read-only access to all Questions and Author responses on the default Manuscript Details pages.

If your publication is using a Custom Details Layout, you should confirm whether or not this information is displayed (if you want it to display) on the Edit Details Page Layout page in PolicyManager.
Editors and Publishers with appropriate permission also have access to all Questions and Author responses on the Transmittal Form:

- If a Question is not configured to be editable on the Transmittal Form from the Create Custom Submissions Questions page, Author responses are displayed as basic text under the ‘Value’ column according to the existing functionality used to display Journal Defined General Metadata Field responses.

- If a Question is configured to be editable on the Transmittal Form from the Create Custom Submissions Questions page, Author responses are displayed in editable text fields under the ‘Value’ column. Multiple values submitted for a response are concatenated into one element and separated by semi-colons for transmittal to third-party production systems.

TO CONFIGURE:
When publications upgrade to version 6.1, all existing Custom Submission Questions in version 6.0 will automatically be ‘translated’ to the new configuration. Administrators do not need to change anything in PolicyManager, and the Questions will continue to function as implemented in version 6.0. However, if you want to take advantage of the new features, some adjustments to the configuration are required.

Go to PolicyManager and click the Create Custom Submission Questions link in the
‘Submission Policies’ section. You will be taken to an enhanced version of the Create Custom Submission Questions page; this is the “master list” of Questions. If you were using Custom Submission Questions in version 6.0, the Questions will be listed on this page when you upgrade to version 6.1. If you were not using this feature in version 6.0, no Questions will be listed on this page when you first upgrade to version 6.1.

NOTE: You can Edit a Question used in version 6.0 by subtly changing its wording. This is permitted, but you should take care not to change the meaning of the Question in such a way that past Author responses to the Question are affected.

Once a list of Questions has been created, you can click the Create Author Questionnaire link to create the Questionnaire.

NOTE: Item Ordering has been removed from this page; ordering is now done on the Author Questionnaire configuration page.

UPGRADE NOTE: As mentioned previously, all Questions in use for version 6.0 will be retained when the publication upgrades to version 6.1. The upgrade script will create a pre-configured “Author Questionnaire”, which will include the publication’s existing Question configuration (e.g. question order, displayed for particular Article Types, etc.). Version 6.0 ‘legacy’ Custom Submission Questions will be assigned a ‘Notes’ Response Type by default upon upgrade. Any text contained in the existing ‘Question’ field is carried over and displayed in the ‘Question’ field, and any text contained in the ‘Default Text for Author Response’ field is carried over and displayed in the ‘Default Value for Field’ field.
On the Create Custom Submission Questions page, click the ‘Add’ button to create a new Question in the ‘master list’, or click the Edit link to modify a Question that existed in version 6.0. The Add/Edit Custom Submission Question page is modified to support several new elements:

1. ‘Instructions for Author Response’ – If you enter text here, it is available to the Author by clicking the Instructions hyperlink next to the Question at the Additional Information submission step.

2. A Question may become outdated over time. You can ‘retire’ a Question by selecting the ‘Hide’ checkbox. The Question must be removed from all Questionnaires before it can be hidden. Hidden Questions are not available for selection on the new Configure Author Questionnaires page.

3. ‘Response Type’ - This indicates how the Author is expected to respond to the Questions at the Additional Information step (i.e. Will he choose an option from a drop-down list? Does he have to enter a date? Can he enter text?) This drop-down list allows you to choose from one of the following options:
   - ‘Text’ (selected by default) - If this Response Type is selected, the Author response entered on the Additional Information step can contain any combination of characters and numbers.
   - ‘Notes’ – Author response may contain any combination of characters and numbers. This is just like ‘Text’, except the Author has a larger area in which to type.
   - ‘Date’ - Author response must be entered in an ‘mm/dd/yyyy’ format. The calendar icon feature is displayed to provide a convenient way for the user to adhere to this format.
   - ‘Integer’ - Author response must be a number.
   - ‘Decimal’ - Author responses can contain only numbers and a decimal point.
   - ‘List’ - Author response requires the Author to select from a list of choices pre-configured by the Administrator. This is described further below.

4. The Question and Author response displays on the Manuscript Details page by default. If you do not want the Question and response to display on the Details page, select the ‘Hide’ checkbox in the grid. You may also enter Help text that would be available via the Details page.
Add Custom Submission Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of an Author Questionnaire used at the Additional Information stop in the Submit Manuscript function. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Custom Submission Question is no longer available for selection in an Author Questionnaire.

Author responses must be configured to use a specific Response Type: **Text** and **Notes** responses can contain any mix of characters and numbers. A **Date** response must be entered in a mm/dd/yyyy format. **Integer** and **Decimal** responses can contain only a number or decimal point. A **List** response requires the Author to select from a list of responses configured by the Site Administrator.

You may then specify if the field should be displayed on the Transmittal Form, and whether the field is required and/or editable on the Transmittal Form. **Help Text** on the Transmittal Form is optional.

Question:

[Input Field]

Instructions for Author Response:

[Input Field]

☐ **Hide**: When you Hide a Custom Submission Question, the question is deactivated (not available for use with new Author Questionnaires).

**Response Type:**

- [ ] **Text**
  
  [Input Field]  
  
  (A value from 1 to 200)

- [ ] **None**
- [ ] **Single Value (enter value below)**

**Maximum Field Length:**

**Default Value for Field:**

If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.

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 Role/Manager 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.

<table>
<thead>
<tr>
<th>Page</th>
<th>Hide</th>
<th>Editable</th>
<th>Required</th>
<th>Help Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manuscript Details</td>
<td>☐</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Transmittal Form</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** A Question cannot be hidden once it has been added to an Author Questionnaire. The question must be removed from all Questionnaires it before it can be hidden.
Selecting the ‘List’ option from the Response Type drop-down refreshes the page to display a View/Edit Values for List link, where you will define the list of possible values the Author can choose from when answering the Question. There is also a drop-down list with four ‘List display’ options, so you can specify how the Author is presented with the list of possible values at the Additional Information step:

1. ‘Drop-down list (Allows for a null or single value selection)’ – The Author would see a drop-down list of allowable values to choose from. He can select one or more values from the drop-down list.

2. ‘Radio Buttons (Allows for a single value selection; requires a default value)’ – The Author would see a set of radio buttons, where he must select one answer.

3. ‘Checkboxes (Allows for multiple value selection; good for 1-5 values)’ – The Author will see a list of selectable checkboxes, where he can select one or more answers. You can also specify the minimum/maximum number of selections the Author is allowed to make.

4. ‘Scrolling Selector (Allows for multiple value selection; good for more than 5 values)’ – The Author would see a scrolling selector box, where he can select one or more answers. You can also specify the minimum/maximum number of selections the Author is allowed to make.
Clicking the View/Edit Values for List link navigates the Administrator to one of two versions of the Configure Values for List page, depending on whether the List Display option selected on the previous page requires definition of a default value. From these pages the Administrator can customize the options available for Author responses from a list, indicate the order in which the answer choices are displayed, and specify the default value.
Example 1: No default value required.

Example 2: Default value required.

Now that you have created (or modified) your master list of Questions and configured the values for List Response Types, you can apply the Questions to an Author Questionnaire. To create a new Questionnaire, go to PolicyManager and click the new Create Author Questionnaires link in the ‘Submission Policies section’; or, click the Create Author Questionnaire link on the Create Custom Submission Questions page.

If your publication was using Custom Submission Questions in version 6.0, your ‘legacy’ Questions are automatically assigned to a pre-configured ‘Author Questionnaire’ when you upgrade to version 6.1.
NOTE: If you Remove the pre-configured Author Questionnaire created at time of upgrade, you will disrupt the flow of your ‘legacy’ Custom Submission Questions in use prior to the upgrade. This Questionnaire should only be removed if you are not going to use Custom Submission Questions in the future, or a new Questionnaire is configured in its place.

If your publication was not using Custom Submission Questions in version 6.0, there is no pre-configured Author Questionnaire created when you upgrade to version 6.1. You must click the ‘Add’ button to create a new Questionnaire using the Questions you created.

When you click the ‘Add’ button on the Create Author Questionnaire page, you are taken to the new Configure Author Questionnaire page where you must enter the ‘Author Questionnaire Name’ and then click the ‘Add Custom Submission Questions’ button to ‘attach’ Questions to this Questionnaire.
Select the Questions you want, and click the ‘Add to Questionnaire’ button. In the example below, note that the fourth Question has already been added to the Questionnaire, and therefore cannot be selected again.

If your publication was using Custom Submission Questions in version 6.0, your ‘legacy’ Questions are automatically listed here when you upgrade to version 6.1.

After clicking the ‘Add to Questionnaire’ button, you are returned to the Configure Author Questionnaire page, where you can adjust the order in which the Questions are displayed to the Author, and indicate whether an Author response is ‘Required for Submission’. If this checkbox is selected, the Author will not be allowed to build his submission PDF without first answering the Question properly. Make sure to click the ‘Save’ button to save your changes.

If your publication was using Custom Submission Questions in version 6.0, your ‘legacy’ Questions are automatically listed here for the pre-configured ‘Author Questionnaire’
when you upgrade to version 6.1.

**Configure Author Questionnaire**

Enter a name for the Author Questionnaire in the 'Author Questionnaire Name' field. Custom Submission Questions may be added to the Author Questionnaire by clicking the 'Add Custom Submission Questions' button, selecting Custom Submission Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save this Author Questionnaire and return to the Create Author Questionnaire page.

**Author Questionnaire Name:** Questionnaire 1 - New Submissions

[Hide] When you hide an Author Questionnaire, the questionnaire will be deactivated (not available for use with any Article Types).

**Question Display Order:**

<table>
<thead>
<tr>
<th>Order</th>
<th>Description</th>
<th>Required for Submission</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Does submission meet the correct word count limits?</td>
<td>✔</td>
<td>Remove</td>
</tr>
<tr>
<td>2</td>
<td>Does submission contain color images?</td>
<td>✔</td>
<td>Remove</td>
</tr>
<tr>
<td>3</td>
<td>Has a copy of our User Agreement Form been included with the submission?</td>
<td>✔</td>
<td>Remove</td>
</tr>
</tbody>
</table>

[Update Item Order] [Add Custom Submission Questions]

CANCEL SAVE

NOTE: If you click the Remove link on this page, the Question will be removed from this particular Questionnaire only; you are not removing it from the master list of Questions. Questions can be safely removed from an Author Questionnaire, even if the Questionnaire has been used previously. This is because the Questionnaire only controls which questions are displayed, the order they are displayed in, and the ‘Required for Submission’ settings that are used for each question at the Additional Information submission step. The Questions themselves and their related responses remain saved in the database even if they are no longer selected as part of an Author Questionnaire.

Once you have created one or more Questionnaires, they are listed on the Create Author Questionnaire page. The illustration below shows a pre-configured Author Questionnaire created upon upgrade for use with existing legacy Custom Submission Questions, as well as Administrator-created Author Questionnaires.
Now that you have created (or modified) a master list of Questions and attached them to one or more Questionnaires, the final configuration step is to apply the Questionnaire(s) to one or more Article Types. Go to the Edit Article Type page in PolicyManager. Note that the Set “Additional Information” Preferences Article Type Parameter is renamed to Set “Additional Information” Author Questionnaire Preferences. The drop-down selector for this option displays a value of ‘Hidden’ as well as each of the Questionnaires created/ displayed on the Create Author Questionnaire page:

- If the ‘Hidden’ option is selected, the Additional Information step is not included as part of the Author submission process (i.e. the Additional Information step is suppressed).
- If a Questionnaire is selected from this drop-down list, the Additional Information step is included as part of the Author submission process, and the Questionnaire selected governs the Questions, Question order, and ‘Required for Submission’ settings that are used for the Article Type.

NOTE: Hidden Questions continue to display for submissions that used them before they were hidden. Hiding a Question only prevents it from being added to another Questionnaire in the future; if it is linked to a legacy submission directly, it continues to display.

Example 1: Page display for a publication using Custom Submission Questions in version 6.0. Illustration shows the pre-configured ‘Author Questionnaire’ configured for a site where an existing list of Questions was in place on the Create Custom Submission Questions page and the Set ‘Additional Information’ Preferences setting was configured to ‘Display’ on the Edit Article Type page for at least one Article Type prior to upgrade.
Example 2: Page display for a publication not using Custom Submission Questions in version 6.0. A setting of ‘Hidden’ is the default value configured upon upgrade if the upgrading site does not have the Set ‘Additional Information’ Preferences setting configured to ‘Display’ for any New or Revised Submissions on the Edit Article Type page.
Imposing Specific Order of Source Files

In EM version 6.0, Authors upload Submission Items (“Items” or “source files”) on the Attach Files page. This page is accessed during the new submission process, when an existing submission is edited, and when submitting a revision. The ‘Item’ drop-down list displays the required Submission Items in alphabetical order, followed by the optional Submission Items in alphabetical order. The designation of required and optional Items varies by Article Type, so the order of the list depends on the Article Type selected at an earlier step in the manuscript submission process.

The Author is allowed to upload his source files in any random order. Once the files are uploaded, he can then re-order the source files in any way he chooses. This may not necessarily be the publication’s preferred Item order, requiring the editorial office staff to edit the submission, re-order the Items in the publication’s preferred order, and rebuild the submission PDF.

In EM version 6.1, publications can customize the order in which Items are displayed in the drop-down lists on the Attach Files page as well as the order in which Items are built into the PDF.

If the publication has imposed a specific source file order, the Submission Items are moved into the imposed order 1) when the user clicks the ‘Update File Order’ button, and 2) when the user clicks the ‘Next’ button to continue with the manuscript submission process. This means that the Author would be allowed to re-order files of the same Submission Item type, but not change the overall Item order. For example, the publication could ‘impose’ that Author Agreement is the first Item, followed by the Blinded Manuscript and then the list of Figures. The Author would be permitted to re-order the Figures, but cannot change the overall order so that the Figures come before the Author Agreement and Blinded Manuscript.

If the publication has chosen to impose the Item order, a new manuscript submission page is displayed when the user clicks the ‘Next’ button from the Attach Files page. This page is entitled Attach Files Order and informs the user that the files have been re-ordered per the publication’s requirements. It also displays the Submission Items in the imposed order. The instructions on this page are customizable in PolicyManager.

The example below shows the Items listed in alphabetical order in the ‘Item’ drop-down list, and customized instructions for the Item Ordering section. Note the Author uploaded the Author Agreement last, even though this is the first Item in the Item order drop-down list.
When Author clicks the ‘Next’ button to proceed with the submission, he is taken to the new Attach Files Order page. The Items are now listed in the publication’s imposed order (Author Agreement has been moved to the first Item in the list) and customizable instructions are displayed. Note that the Author is permitted to re-order files with the same Item type (e.g. all Figures).

NOTE: Existing submissions do not have their files re-ordered when the publication upgrades to EM version 6.1, unless these submissions are subsequently edited after the upgrade.
TO CONFIGURE:
When your publication upgrades to version 6.1, the Master Submission Item list is automatically put in alphabetical order. To change the order, go to PolicyManager and click the Edit Submission Items link. You will be taken to an enhanced EditMaster Submission Item Types page, where you can change the order by entering numbers into the ‘Order’ boxes and clicking the ‘Update Item Order’ button.

- Select the ‘Impose this order on uploaded files’ checkbox and then click the ‘Save Changes’ button to impose the order on all Article Types.
- Select the ‘Show required Items for each Article Type first in the drop-down list’ checkbox to list the required Items first in the drop-down lists on the Attach Files page.
- If you select both options, the required Items will be listed first, but the Items will be re-ordered per the ‘Order’ boxes before the PDF is built.

Next, go to the existing PolicyManager page Edit Manuscript Submission Instructions. Default instructions for the new manuscript submission pages are visible next to the new ‘Attach Files Order’ section of the page. These instructions can be customized and saved.
**Extended Classification Hierarchy**

In EM version 6.0, publications can use up to two levels of classifications, defined by their numbering, such as ‘10: Main heading’, ‘10.010: Classification entry’, etc.

New in version 6.1, this is extended to allow an unlimited number of Classification levels, with the only restriction being that Classification numbers are less than 256 characters in length. For example:

- 10: Main Heading
- 10.010: Sub-Heading
- 10.010.001: Classification entry

Pages used to select Classifications now have several new features:

1. A tree-style Classification list display [+ and -] icons expand and collapse portions of the Classification list.
2. Expand All / Collapse All links expand or collapse the entire list.
   - Note: For performance reasons, these links are displayed for publications with 1,000 Classifications or less.
3. An intuitive method of selecting and removing Classifications from the user’s personal list.
   - To add Classifications to your personal list, click the checkbox(es) of the Classifications you want in the main list and click the ‘Select->’ buttons to move your selections to the ‘Selected Classifications’ list.
   - To remove Classifications from your personal list, click the checkbox(es) of the Classifications you want to remove in the Selected Classifications window and click the ‘<-Remove’ button.
   - When you are finished, click the ‘Submit’ button to save your changes.
Publications also now have more control over the way Classifications display and are selected by users. On the Set Classification Display and Selection Policies page in PolicyManager, you can configure several display options including:

- Highlight the top-level of Classifications to use as headings.
- Turn off Classification numbering when Classifications are displayed.
- Sort lists of Classifications alphabetically by the Classification text description (if Classification numbers are not shown). This display option is recommended only for simpler 1- or 2-level Classification hierarchies.
- Prevent users from selecting some Classifications: Either the top-level of Classifications, or all levels except the very bottom level of Classifications.
- Automatically select parent Classifications whenever a Classification is selected by the user.
- Hide Classification terms when they are no longer required.
Top-level Classifications can be treated as headings, and therefore cannot be selected.

Selection can also be limited to the lowest level of Classification only.

You can configure the system to automatically select all parent Classifications of a Classification term selected by the user. This can be combined with either of the options limiting the classifications which are selected by the user.

Users can now search for Classification terms when selecting Classifications, supporting publications using large Classification lists. To execute a search, simply type the desired text into the Search field and click the ‘Search’ button to look for Classifications whose descriptions contain the search text. Matching records and their parents will be shown in the results. Clicking the ‘Clear’ button will re-set the search and return to the full Classification list.
If you click a Classification description, the *View Full Classification Details* pop-up is launched. This page shows the full hierarchy leading to the selected Classification.

**TO CONFIGURE:**

When the publication upgrades to version 6.1, the existing Classification schema is retained and is automatically supported in the new structure. To modify or expand the Classifications schema, click the *Edit Classifications* link in the ‘Submission Policies’ section of PolicyManager. You will see an enhanced *Edit Classifications* page with the new ‘tree’ structure, and a Search tool to quickly locate terms that you may want to change.
Edit Classifications

The Editorial Manager Classification schema contains a hierarchical numbering structure. Each level is separated by a decimal point/period character. To add or change a classification, enter the full classification number, for example 10.190.020.001 for a fourth-level classification. Click a Classification’s description to view the full list of classifications above it in the hierarchy. Note that Expand All and Collapse All navigation links are initially provided for smaller classification lists, but if your list exceeds 100 terms these will not display.

Search

Add Classification

Active Classifications

Hidden Classifications

Policy Manager Main Menu
Click the ‘Add Classification’ button to add a new Classification Number and Description.

NOTE: When entering a new Classification, the Classification Number field must contain only numbers and decimal points (e.g. 10, 10.1, 10.001,010); alpha-numeric characters (e.g. A1, A.10, 03.30.+p) are not allowed.

When you add a new Classification, the system organizes the list by decoding the Classification number to identify its ‘parent’ Classification in the list. You are allowed to enter a Classification where a parent does not yet exist, but you will be asked to confirm the desired behavior.

If you choose to proceed without a parent Classification, there will be gaps in the structure and you will see a bold red entry [...] .

NOTE: Authors and Reviewers selecting Classifications would see the [...] in gray font, which they may find confusing.
Classifications may now be Hidden if no longer required. Click the Edit link on the Edit Classifications page to Hide a Classification term. Hidden Classifications are listed in a separate section below the active Classifications on the main Edit Classifications page, as shown above.

When you Hide a Classification which has Sub-Classifications beneath it, all of those Sub-Classifications are also automatically Hidden. If you Edit a Classification Number for a Classification with Sub-Classifications beneath it, the system will not re-number the Sub-Classifications automatically. This would leave a gap in the numbering system and you will need to either add a new, replacement Classification with the old number, or renumber all Sub-Classifications manually.

If you choose to proceed with Hiding the parent Classification, you will be asked to confirm the desired behavior.

To configure the way Classifications appear to Authors and Reviewers, and the automatic
To select of parent Classifications, click the **Set Classifications Display Policy** link in PolicyManager. This page has been enhanced with several new options.

### Set Classification Display and Selection Policies

The Editorial Manager Classification Schema contains a hierarchical numbering structure; these options control the display and selection of Classifications.

<table>
<thead>
<tr>
<th>Selection Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users may not select top-level classifications.</td>
</tr>
<tr>
<td>Users may only select from the lowest level of classification</td>
</tr>
<tr>
<td>Automatically select all parent classifications.</td>
</tr>
</tbody>
</table>

These options control the way classifications are listed. Hiding classification numbers is only recommended for shorter lists. The Sort Alphabetically option automatically hides classification numbers. It is easier to navigate longer lists of classifications if you highlight the top level.

<table>
<thead>
<tr>
<th>Display Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highlight top-level classifications.</td>
</tr>
<tr>
<td>Sort Alphabetically (automatically hides classification numbers)</td>
</tr>
<tr>
<td>Hide Classification Numbers.</td>
</tr>
</tbody>
</table>

#### Selection Policies

- **Select ‘Users may not select top-level classifications’** if your first level of Classifications is intended to act as headings only, with the main Classifications at a lower level. This may be combined with the ‘Highlight top-level classifications’ setting.
- **Select ‘Users may only select from the lowest level of classification’** if you wish users to select only the most narrowly-defined subject terms. This may be combined with the ‘Automatically select all parent classifications’ to also pick up all broader terms leading to the user’s chosen areas of expertise, allowing for wider-ranging Reviewer searches.
- **Select ‘Automatically select all parent classifications’** to ensure that users select as wide a range of Classifications as possible; this setting will result in more Reviewers matching ‘Suggest Reviewers’ searches.
  - This option will also de-select Classifications in order to maintain an unbroken chain of Classifications for all selection. This is particularly noticeable if you also limit the ability of users to select Classifications (either excluding selection from the top-level classifications or allowing selection from only the lowest level).
- **Select the ‘Highlight top-level classifications’** to have these appear as headings; clear this option if you only have a single level of Classifications in a simple list.
- **Select the ‘Sort Alphabetically’ option** to have Classifications at each level sort alphabetically by description, ignoring Classification numbers.
  - NOTE: Selecting this option automatically hides Classification numbering and is recommended for publications with only one or two levels of Classification terms.
- **Select the ‘Hide Numbering’ option** to suppress Classification numbering. Numbering is still required when configuring Classification lists to link classifications to parents, but will not be shown to users.
**Personal Keywords**

In EM version 6.0, publications can collect Personal Keywords when an Author submits a manuscript. However, when a new person registers on the system, there is no opportunity to enter Personal Keywords (i.e. users cannot indicate areas of expertise).

In version 6.1, you can allow new users to enter free-form Keywords when registering for EM. You can specify whether entering Personal Keywords is optional or required, and also set upper and lower limits for the number of Keywords they are allowed to enter.

When Keywords (and/or Classifications) are enabled for registration in PolicyManager, users who register will see a new ‘Areas of Interest or Expertise’ section on the Registration page. In the example below, the publication has specified that new users may enter (optional) up to 5 Personal Keywords.

This example shows a publication that has required new users to enter at least 2 Personal Keywords when registering for EM. The user is not allowed to proceed with the registration (i.e. the ‘Continue’ button is disabled) until he has entered the minimum number of required Keywords.

Clicking the ‘Edit Personal Keywords’ button on the Registration page allows the user to manage his Keywords by adding, editing or removing entries in the list.
Once Keywords have been entered for a person, they are displayed on the main *People Information* page. Users can also modify their own Personal Keywords on the *Update My Information* page.

Even if Personal Keywords are ‘hidden’ in PolicyManager (i.e. users cannot enter Keywords when registering or edit Keywords on the *Update My Information* page), Editors still have access to Personal Keywords on the *Search People – Update Information* page. This allows the publication to maintain an area of expertise for their users (especially Reviewers) that cannot be changed by those users.

Editors can then use Personal Keywords as selection criteria when searching for Reviewers.
TO CONFIGURE:

Click the **Edit Registration Fields** link in the ‘Registration and Login Policies’ section of PolicyManager. This takes you to the existing **Edit Registration Fields** page, which has been enhanced with new settings for both Keywords and Classifications.

- Select ‘Hidden’ to stop users from entering Personal Keywords when registering (Editors will still be able to add or edit these on the **Search People – Update Information** page).
- Select ‘Optional’ to allow users to enter Personal Keywords when registering or on the **Update My Information** page. You may also set a ‘Maximum’ limit with this option.
- Select ‘Required’ to force a user to enter at least one Personal Keyword when registering. A ‘Minimum’ value is required for this option, and defaults to ‘1’ if selected.
- The ‘Maximum’ value sets an upper limit for the number of Keywords that can be selected; and can be used with any of the other options.
Under PolicyManager, the *Edit Registration Instructions* page has been extended to include new instructional text for the ‘Areas of Interest and Expertise’ section. This text appears on the *Registration*, *Update My Information* and *Search People – Update Information* pages. The default text is shown below; however, you should modify this text to reflect your publication’s policy.

Publications which allow proxy registration can also make Personal Keywords mandatory when a user logs in after being proxy registered (known as Expedited Reviewer Login). The existing *Configure Expedited Reviewer Login* page on PolicyManager has been extended to accommodate this.
Two new mail merge fields are introduced related to Keywords.

1. `%PERSON_KEYWORDS%` - This merge field is available for publications to use in all letters. When used, it inserts each of the personal keyword currently associated with the intended recipient’s record.

2. `%UPDATE_CLASSIFICATIONS_KEYWORDS_DEEP_LINK%` - This merge field is available for publications to use in all letters. When this merge field is included in a letter, it is replaced with a deep link for the recipient of the letter (the link is not visible in CC’d letters or in history). Clicking the deep link brings the user directly to a page where they may update their Personal Keywords.
Personal Classifications Enhancements
In EM version 6.0, Authors can select Personal Classifications (i.e. areas of expertise) from a pre-defined list when they register on the system. However, if the publication does not use a formal Classification system, there is no way to turn off (hide) Personal Classifications when a new person registers.

In version 6.1, you can turn off Personal Classifications on the Registration page. You may also set upper and lower limits for the number of Personal Classifications users are allowed to select.

When Classifications (and/or Keywords) are enabled for registration in PolicyManager, users who register will see a new ‘Areas of Interest or Expertise’ section on the Registration page. In the example below, the publication has specified that new users may select (optional) no more than 3 Personal Classifications.

This example shows a publication that has required new users to select at least 2 – but no more than 5 - Personal Classifications when registering for EM.

If the new user attempts to submit the registration without selecting the required number of Classifications (as specified in PolicyManager), he is notified to return to the Registration page and select/enter the missing information.
Clicking the ‘Select Personal Classifications’ button on the Registration page takes the user to the enhanced Select Personal Classifications page described in the Extended Classification Hierarchy section of this document.

Once Classifications have been selected for a person, they are displayed on the main People Information page. Users can also modify their own Personal Classifications on the Update My Information page.
Per current functionality, even if a user cannot see Classifications when registering, Editors have access to both on the Search People – Update Information page. Editors may use either Keywords or Classifications to designate a Reviewer’s areas of expertise in the system.

Even if Personal Classifications are ‘hidden’ in PolicyManager (i.e. users cannot select Classifications when registering or edit Classifications on the Update My Information page), Editors still have access to Classifications on the Search People – Update Information page. Editors may use Classifications to designate a Reviewer’s areas of expertise in the system.

Per current functionality, Editors can then use Personal Classifications as selection criteria (newly enhanced in version 6.1) when searching for Reviewers.

TO CONFIGURE:

Click the Edit Registration Fields link in the ‘Registration and Login Policies’ section of PolicyManager. This takes you to the existing Edit Registration Fields page, which has been enhanced with new settings for both Keywords and Classifications.

- Select ‘Hidden’ to stop users from selecting Classifications when registering (Editors will still be able to add or edit these).
- Select ‘Optional’ to allow users to select Classifications. You may also set a ‘Maximum’ limit with this option.
- Select ‘Required’ to force a user to select at least one Classification. A ‘Minimum’ value is required for this option, and defaults to ‘1’ if selected.
- The ‘Maximum’ value sets an upper limit for the number of Classifications that can be selected; and can be used with any of the other options.
Under PolicyManager, the *Edit Registration Instructions* page has been extended to include new instructional text for the ‘Areas of Interest and Expertise’ section. This text appears on the *Registration, Update My Information* and *Search People – Update Information* pages. The default text is shown below; however, you should modify this text to reflect your publication’s policy.

The ‘Select Personal Classifications Pop-Up window’ text defines the instructions the user will see when selecting Classifications.

Publications which allow proxy registration can also make Personal Classifications mandatory when a user logs in after being proxy registered (known as Expedited Reviewer Login). The existing *Configure Expedited Reviewer Login* page on PolicyManager has been extended to accommodate this.
In addition, a new mail merge field %UPDATE_CLASSIFICATIONS_KEYWORDS_DEEP_LINK% is available for publications to use in all letters. When this merge field is included in a letter, it is replaced with a deep link for the recipient of the letter (the link is not visible in CC’d letters or in history). Clicking the deep link brings the user directly to a page where they may update their Personal Classifications.
Assign Editor Enhancements
In EM version 6.0, the Invite/Assign Editor interface does not allow the user to choose a different Assign Editor letter, nor is there the ability to choose or customize the Assign Editor Notification Letters.

In version 6.1, the Invite/Assign Editor screen flow is streamlined and enhanced to allow users to choose different letters and customize those letters before sending.

On the Assign Editor page, the ‘Send Default Letter’ and ‘Send Custom Letter’ buttons are replaced by a single ‘Proceed’ button.

Once the user has selected an Editor and clicks the ‘Proceed’ button, he is taken to a new Assign Editor – Confirm Selection and Customize Letter page, where he can choose another letter for the Editor being invited/assigned and customize letters to those configured to receive notification when an Editor is assigned.
NOTE: The letters in the drop-down lists are limited to the new ‘Invite/Assign/Unassign Editor’ Letter Family in PolicyManager. When your publication upgrades to version 6.1, all letters associated with the ‘Editor Assigned (Not Invited)’ and ‘Editor Assigned Notification’ events in ActionManager are automatically assigned to this new Letter Family.

If your publication Invites Editors (rather than assigning them automatically), users will see a slightly different Invite Editor – Confirm Selection and Customize Letter page. All letters associated with the ‘Editor Invited for Assignment’ and ‘Editor Assigned Notification’ events are shown, with the drop-down selections limited to the new ‘Invite/Assign/Unassign Editor’ Letter Family.
**Invite Editor - Confirm Selection and Customize Letters**

The following people are configured to receive a letter when an Editor is invited to be assigned to a submission. Click Customize if you want to personalize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person’s name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to an individual, click the Letter drop-down box next to that person’s name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If there is a person in the list to whom you do not want to send a letter, check the Do Not Send Letter box next to that person’s name. When you click Confirm Selections and Send Letters, that person will not be sent a letter.

<table>
<thead>
<tr>
<th>Name</th>
<th>Letter</th>
<th>Do Not Send Letter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ed Editor, M.D. (Editor-in-Chief)</td>
<td>Invite Editor</td>
<td>Customize</td>
</tr>
<tr>
<td>Unavailable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Letter</th>
<th>Do Not Send Letter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bai Sip (Author)</td>
<td>Editor invited</td>
<td>Customize</td>
</tr>
</tbody>
</table>
Unassign Editor Enhancements

In EM version 6.0, Editor Roles with appropriate RoleManager permission can ‘undo’ Editor assignments, but only before any Reviewers have been invited or assigned.

In EM version 6.1, when an Editor is unassigned the user will have the option of immediately switching to a new Editor, or ‘rolling back’ the assignment to the previous Editor in the chain. Editors can also be unassigned after Reviewers have been invited or assigned. An Editor assignment may be switched to another Editor or rolled back for any submission where the ‘Notify Author’ letter has not been saved (to send later) and/or sent to the Author.

When a submission is rolled back, the submission moves back ‘up the chain’ to the assigning Editor (i.e. back to the New Submissions Requiring Assignment or New Assignments folder). Only a Handling Editor can be unassigned (i.e. an Editor cannot be unassigned from the middle of an Editor chain). The submission then remains ‘unassigned’ until the Editor clicks the Assign Editor link and assigns a new Editor. Note this is the current functionality for Undo Editor Assignment. If Reviewers have already been invited, they would report to the previously assigned Editor.

If there is only one Editor in the chain, an Editor assignment must be immediately switched to a new Editor. The new Editor would immediately assume responsibility for the submission.

Editor Roles with permission to ‘Unassign Other Editors’ or ‘Unassign Myself’ will observe the following terminology changes in the system:

1. The Undo Assignment and Undo Editor Assignment action links are changed to a universal Unassign Editor link on the following pages:
   - New Assignments
   - Search Submissions
   - View All Assigned Submissions
   - Group by Editors I Assigned
   - Group by Editors with Current Responsibility
   - Group by Manuscript Status

2. Since Editors can now be unassigned after Reviewers are invited, the Unassign Editor action link is added to several pages (as long as the Editor Role has permission to ‘Unassign Myself’ (and it is his assignment) or ‘Unassign Other Editors’ (and it is another Editor’s assignment)):
   - Submissions with 0 (1, 2, 3, 4+) Reviews Complete
   - Submissions with Required Reviews Complete
   - Submissions Requiring Additional Reviewers
   - Submissions with One or More Late Reviews
   - Submissions with Reviewers Invited - No Response

NOTE: If a submission’s decision has been rescinded, the Unassign Editor link is
available, unless the ‘Notify Author’ letter has been saved (to send later) or if the Notify Author letter has been sent to the Author.

NOTE: The Unassign Editor link does not display for submissions that have not yet been assigned to an Editor (e.g. new submission received by the editorial office). Exception: If the first Editor in the chain has been invited, but has not yet agreed, then the Unassign Editor link is displayed.

When an Editor clicks the Unassign Editor link, he now has the option to ‘roll back’ the Editor assignment, or ‘switch’ to another Editor.

NOTE: If the Editor being unassigned is the first assigned Editor, the ‘Roll Back to Previous Editor’ button is suppressed (i.e. the submission cannot be rolled back if there are no other Editors in the chain).

If the user chooses ‘Switch to New Editor’, he is taken to the new Switch to New Editor page, which is very similar to the regular Assign Editor page. When an assignment is switched to a new Editor, the following changes occur in the system:

1. The Document Status is changed to ‘Editor Unassigned’ (for historical tracking purposes), and then immediately reverts to the same status the submission was in prior to the Editor being unassigned (e.g. With Editor, etc.).
2. The submission moves to its previous folder (New Submissions Requiring Assignment or New Assignments).
3. When the new Editor is assigned (switched to), the submission will appear in the appropriate ‘under review’ folders for the newly assigned Editor (i.e. whichever folders the submission was displayed in before the Editor was unassigned, the submission will display in those same folders for the newly assigned Editor).
Once the user has selected a new (switch to) Editor and clicks the ‘Proceed’ button, he is taken to the Switch to New Editor – Confirm Selections and Customize Letters page, where he can choose and customize letters to the following people:

1. The Editor being unassigned. The letter is associated with the ‘Unassign Editor’ event in ActionManager.
2. Others who are notified that an Editor has been unassigned (e.g. office staff, Author, Reviewers associated with the submission). Letter(s) is associated with the ‘Unassign Editor Notification’ event in ActionManager.
3. The New (switched to) Editor being assigned. Letter(s) is associated with the ‘Assign Editor’ event in ActionManager.
4. Important Note: Publications using Invite Editor functionality must automatically assign the Editor in a switch, because the submission cannot be in limbo (time between Editor being invited and agreeing/declining to take the assignment). It is possible that publications using Invite Editor functionality would not have any letters configured for the Assign Editor event. However, this would not be a problem, because the Editor assignment is still possible, even if no letter is configured. In this case, the new Editor would be shown in the ‘New Editor Being Assigned (Switched To)’ section, with no letter.
5. Others who need to be notified that a new Editor has been assigned (e.g. office staff, Corresponding Author, other Editors). Letter(s) is associated with the ‘Assign Editor Notification’ event in ActionManager.
Switch to New Editor - Confirm Selection and Customize Letters

The following people are configured to receive a letter when an Editor is unassigned for a submission, and when the submission is switched to a new Editor. Note: All new (switched to) Editors must be automatically assigned to the submission, even if the Editor Role is traditionally invited for Editor assignments.

Click Customize if you want to personalize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person’s name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to an individual, click the Letter drop-down box next to that person’s name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If there is a person in the list to whom you do not want to send a letter, check the Do Not Send Letter box next to that person’s name. When you click Confirm Selections and Send Letters, that person will not be sent a letter.

NOTE: The letters in the drop-down lists are limited to the new ‘Invite/Assign/Unassign Editor’ Letter Family in PolicyManager.

If the user chooses ‘Roll Back to Previous Editor’ on the Unassign Editor page, he is taken to the Roll Back to Previous Editor – Confirm Selections and Customize Letters page.
When an assignment is rolled back to the previous Editor BEFORE Reviewers have been invited, it is typically because the assignment was made in error (i.e. Editor A assigned Editor B, and then immediately realized he made a mistake). Therefore, the Document Status reverts to the previous status (e.g. from ‘Received by Editor’ to ‘Submitted to Journal’) and can be seen in Status History. The submission moves back up into the New/Revised Submissions Requiring Assignment or New Assignments folder, depending on which Editor Role assigned the submission initially. Otherwise, there is no other record of the original assigned Editor (e.g. the Editor who was assigned in error).

When an assignment is rolled back to the previous Editor AFTER Reviewers have been invited, it is typically because the assigned Editor has moved on to another role at the publication, has left the publication, or can no longer perform his duties in the current capacity for the publication. In this case, the Document Status is changed to ‘Editor Unassigned’ (for historical tracking purposes), and then immediately reverts to the status the submission was in prior to the Editor being unassigned (e.g. Under Review, Required Reviews Complete, etc.). If the previous Editor is a higher Editor in the chain, the previous Editor will be charged with the time the submission was with the unassigned Editor (e.g. Editor Performance Statistics).

A new merge field [%UNASSIGNED_EDITOR_NAME% ] can be used in letters
configured for the ‘Editor Unassigned’ and ‘Editor Unassigned Notification’ events. This merge field is best used in Editor notification letters, and will pull in the ‘REALNAME’ of the Editor who was unassigned.

There are some subtle changes to Reports to account for unassigned Editors, particularly if an Editor is unassigned after Reviewers have been assigned.

1. Editor Reminder Reports – ‘# Reminders Sent’ will count reminders that may have actually been sent to the previous Editor.
2. Manuscript Rating Report – Rating may actually have been entered by the previous (unassigned) Editor.
3. Editor Performance Report
   - Average Number of Reviewers per Submission – New Editor will get ‘credited’ for Reviewers the previous Editor assigned.
   - Total Number of Reviewers Utilized - new Editor will get ‘credited’ for Reviewers the previous Editor assigned.
   - Number of Unique Reviewers Utilized - New Editor will get ‘credited’ for Reviewers the previous Editor assigned.
   - Time to Decision – New Editor will be ‘penalized’ for time spent by the first Editor before he was unassigned.
   - New text is displayed in the ‘Editor Decision Summary’ section: “Editors who assume responsibility for submissions where another Editor was unassigned will inherit all time and Reviewer statistics associated with that original Editor.”

TO CONFIGURE:

No configuration is required if your publication was using the ‘Undo Editor Assignment’ feature in version 6.0. If you would like to start using Unassign Editor functionality in version 6.1, you must enable the ‘Unassign Other Editors’ and/or ‘Unassign Myself’ permissions in Editor RoleManager.
Administrators will also see the following terminology changes when the publication is upgraded to version 6.1:

1. ActionManager events renamed:
   - ‘Undo Editor Assignment’ is changed to ‘Unassign Editor’
   - ‘Undo Editor Assignment Notification’ is changed to ‘Unassign Editor Notification’

2. Document Status Terms associated with these events are also renamed:
   - ‘Undo Editor Assignment’ is changed to ‘Unassign Editor’
   - ‘Undo Editor Assignment Notification’ is changed to ‘Unassign Editor Notification’

3. Editor RoleManager permissions are renamed:
   - ‘Undo Other Editors’ Assignments’ is changed to ‘Unassign Other Editors’
   - ‘Undo My Assignments’ is changed to ‘Unassign Myself’

4. New ‘Invite/Assign/Unassign Editor’ Letter Family. When the site is upgraded to version 6.1, all letters configured for the following events will be automatically assigned to this new Letter Family. The benefit is that Editors selecting letters for these functions will choose only from the letters in this letter family, rather than having to scroll through the list of ALL letters in the system.
   - Editor Assigned (Not Invited)
   - Editor Invited for Assignment
   - Editor Assignment Notification
   - Undo Editor Assignment
   - Undo Editor Assignment Notification
Proposing Reviewers
In current functionality, Editors may select Reviewers to invite immediately, or Alternate Reviewers who will be used if an invited Reviewer declines the invitation or is un-invited.

Under new functionality, Editors may also Propose Reviewers. This allows Editors to recommend Reviewers for other Editors to use. Proposed Reviewers are listed on the main Reviewer Invitation summary pages, and can be selected directly to use as Invited or Alternate Reviewers.
If an Editor has previously Proposed one or more Reviewers, any Editor with the ‘Invite Reviewers’ or ‘Select Alternate Reviewers’ permissions can use the Proposed Reviewers immediately by checking the relevant selection box on the Reviewer Selection Summary page, and clicking the ‘Select’ button. Editors with appropriate permission can also remove Proposed Reviewers from the list.

When an Editor searches for a Reviewer, he will now see up to three selection checkboxes, depending on RoleManager permissions. Editors with the new ‘Propose Reviewer’ permission will see a ‘Select as: Prop.’ (Proposed) checkbox next to each name in the search results.

When confirming the selections, the Editor can type Notes associated with each Proposed Reviewer.

The Notes are then available for others to see by clicking the View action Link for each Proposed Reviewer.
The list of Proposed Reviewers is displayed on the default *Editorial Details* page. If your publication is using a Custom Details page layout, and you want to see Proposed Reviewers on the Custom Details pages, you must modify the Custom Details page layouts in PolicyManager.

<table>
<thead>
<tr>
<th>Recommendation:</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVIEWERS</td>
</tr>
<tr>
<td>Name: Jane Doe</td>
</tr>
<tr>
<td>Review Status:</td>
</tr>
<tr>
<td>Date Reviewer Invited: May 23, 2007</td>
</tr>
<tr>
<td>Date Submission Due: 06/23/2007 (mm/dd/yyyy)</td>
</tr>
<tr>
<td>Elapsed Days: 0</td>
</tr>
</tbody>
</table>

| Name: John Doe | Reviewer Invited |
| Review Status: | Proposed Reviewer |
| Date Reviewer Invited: May 23, 2007 |
| Date Submission Due: 06/23/2007 (mm/dd/yyyy) |
| Elapsed Days: 0 |

<table>
<thead>
<tr>
<th>ALTERNATE REVIEWERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternate Reviewers: Arnold Lane (Referee) Emily Pike (ID Reviewer) (Linked to Jane Doe Reviewer)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REVIEWERS PROPOSED BY EDITORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewers Proposed by Editors: Tarquin Featherstone (Referee) Paul Revere (ID Reviewer)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AUTHOR(S) INVITED TO SUBMIT COMMENTARY</th>
</tr>
</thead>
</table>

**TO CONFIGURE:**

Go to Editor RoleManager and enable the new ‘Propose Reviewer’ permission to allow Editors to recommend Reviewers for other Editors to select.

The associated ‘Remove Proposed Reviewers’ permission allows Editors to remove Proposed Reviewers. Most Editors who can Propose Reviewers should also be configured with this permission, but you can allow other Editors who cannot Propose Reviewers to remove unwanted Proposed Reviewers.

Both of these new permissions are **not** selected when the publication upgrades to version 6.1 and must be enabled manually.
NOTE: An Editor who is given this new permission will see the Invite Reviewer action link in folders (even if he does not have permission to ‘Invite Reviewers’ or ‘Select Alternate Reviewers’). This link is used to initiate a search for Reviewers to Propose, in the same way as an Editor currently searches for Reviewers to Invite or select as Alternate Reviewers.
Linking Alternate Reviewers to a Specific Reviewer

In current functionality, Alternate Reviewers form a pool of ‘backup’ Reviewers, and the next Alternate Reviewer in line is automatically promoted whenever a Reviewer (with the same Reviewer Role) declines an invitation or is un-invited. This means that an alternate Biostat Reviewer would automatically replace another Biostat Reviewer, if the invited Biostat Reviewer declined the invitation.

Under new functionality, you can link one or more selected Alternate Reviewers to a specific Invited Reviewer. These Alternate Reviewers are only promoted if the Reviewer they are linked to is un-invited or declines the invitation, and will be promoted before any un-linked Alternate Reviewers are used. It is possible to combine linked and non-linked Alternate Reviewers within the same submission.

Only one Linked Alternate Reviewer (the first) is promoted – this then becomes the primary Invited Reviewer, and any other Alternate Reviewers that were linked to the first Reviewer to decline or be un-invited are then linked to the promoted, Linked Alternate. Note this only applies if the submission’s Article Type is configured to ‘Automatically Promote Alternate Reviewers’ in PolicyManager (this can now be turned off under new functionality as described in the Preventing Automatic Promotion of Alternate Reviewers section of this document).

When inviting Reviewers, the display of the initial Reviewer Selection Summary page now lists the Linked Alternate Reviewers beneath the Invited Reviewer they are linked to. Editors with permission to ‘Link/Unlink Alternate Reviewers’ will see a Link action link beside the previously selected Alternate Reviewers, allowing them to link the Alternate directly to a specific Invited Reviewer. Editors with this permission will also see an Un-Link action link beside linked Alternate Reviewers, allowing them to break the link between the primary Invited Reviewer and the Alternate Reviewer.

Clicking the Link action link takes the Editor to a new page where he can select which invited Reviewer the Alternate should be linked to.
Linking an Alternate Reviewer to an Invited Reviewer moves the Alternate Reviewer up to the main Invited Reviewers table. Both the primary, Invited Reviewer and the Alternate Reviewers must be in place in the main tables before they can be linked.

A single Invited Reviewer may have several Linked Alternate Reviewers, but an Alternate Reviewer can be linked to only one Invited Reviewer. The first linked Alternate Reviewer is promoted when an Invited Reviewer declines or is un-invited, and the remaining linked Alternates become linked to the Reviewer who was promoted. Editors can re-order the Alternates linked to a single Invited Reviewer using the up/down arrows.
TO CONFIGURE:
Go to Editor RoleManager and enable the new ‘Link/Unlink Alternate Reviewers’ permission to allow Editors to link Alternate Reviewers to specific Invited Reviewers. This permission is **not** automatically enabled when the publication upgrades to version 6.1 and must be enabled manually.
Preventing Automatic Promotion of Alternate Reviewers

In EM version 6.0, the next available Alternate Reviewer is always automatically promoted whenever a Reviewer declines an invitation or is un-invited. There is no opportunity for an Editor to intervene.

Under new functionality, automatic promotion of Alternates can be turned off for selected Article Types in PolicyManager. If automatic promotion is turned off, an Editor must go into the submission and manually promote the Alternate Reviewer they wish to use. Or, the Editor may decide to first contact the original Reviewer and re-invite them, for example.

This also applies to Linked Alternate Reviewers, who will not be promoted unless the Promote link is clicked on the Reviewer Selection Summary page.

TO CONFIGURE:
On the Edit Article Type page in PolicyManager, you will see a new ‘Automatically Promote Alternate Reviewers’ option. This option is enabled by default when your publication upgrades to version 6.1 and when a new Article Type is created. If you prefer to have all Alternate Reviewers promoted manually, you must edit each Article Type to clear this setting.
NOTE: Changing the ‘Automatically Promote Alternate Reviewers’ setting will have immediate effect on all submissions of this type already in the system (i.e. it does not just apply to new submissions received by the editorial office after the setting is changed).
New Criteria for Reviewer Searches

When an Editor searches for Reviewers to invite, propose, or suggest as an Alternate, three new search criteria are now available:

1. E-mail Address
2. Personal Classifications
3. Personal Keywords

TO CONFIGURE:

No configuration is required to make the new search criteria appear. However, your publication should be using Personal Classifications or the new Personal Keywords features for these options to be useful.
Streamlined Reviewer Searching

To support the new Propose Reviewer and Link Alternate Reviewer features, the Search Reviewer pages have been reorganized. Even if your publication is not taking advantage of these new features, Editors who invite Reviewers should be aware of several enhancements to make the Reviewer selection process more streamlined.

The Invited and Alternate Reviewer tables have been combined within a single ‘Selected Reviewers’ section on the page, with the main Invited Reviewers table being renamed.

Editors who do not work on IJRS-linked publications will now see a single ‘Search My Publication’ option; there are no longer separate searches for Invited and Alternate Reviewers.

Similarly, Editors who work on IJRS-linked publications will now see a pair of search options: ‘Search My Publication’ and ‘Search Another Publication’ (if they have permission to do so).
Under new functionality, Editors carry out a single search for any type of Reviewer (rather than executing one search for a Reviewer to invite immediately and a separate search for Alternate Reviewers). The Editor can then select any type of Reviewer that he has permission to (Primary, Alternate or Proposed) from the results. When presented with the results of a Reviewer search, Editors see up to three separate columns containing selection/check boxes – one for selecting Reviewers to Invite immediately, one to select Alternate Reviewers, and one to select Reviewers to Propose.

If an Editor does not have permission to select a particular type of Reviewer, the
associated column will not appear (i.e. if he does not have permission to ‘Select Alternate Reviewers’, the ‘Alt.’ column is suppressed). If a particular Reviewer has already been selected, the checkboxes are suppressed for that person.

NOTE: A Reviewer who was previously proposed by another Editor may still be selected to be invited or as an Alternate Reviewer. The information shown in red text beneath the Reviewer’s name now informs the Editor that a Reviewer has been proposed for this, or another submission.

The page where Editors assign Reviewer Roles to non-Reviewers who have been selected now confirms what type of Reviewer each person has been selected as.
For IJRS-linked publications, additional information is given on the Roles each person has in the publication that was searched.

The final confirmation page following Reviewer search and selection now accommodates all three types of Reviewers (Reviewers to invite immediately, Alternate Reviewers and Proposed Reviewers) in a single location. Other benefits on this page include:

1. The instructional text at the top of the page can be ‘expanded’ or ‘collapsed’ as the user prefers.
2. Editors with appropriate RoleManager permission can modify due dates.
3. Editors can select previously submitted reviews to include with the Reviewer invitation (this was previously done on the Reviewer Selection Results pages).
Click the ‘Change Selections’ button to move Reviewers from one category to another (i.e. change a Proposed Reviewer to an Alternate), or to search for more Reviewers without returning to the initial Reviewer Selection Summary page and executing a brand new search (‘Change Search Type’).

For IJRS-linked publications, Editors can also switch between searching the home publication and other publications in the group (if they have sufficient permissions).

Changing Search Type allows an Editor (with appropriate RoleManager permission) to carry out several searches easily, building up a list of selected Invited, Alternate or Proposed Reviewers in any combination, before finally confirming all selections and customizing letters in a single action. This is a significant improvement from version 6.0, where each type of search had to be executed separately, and letters sent separately for each search type. Under new functionality, all Reviewer selections are retained when an
Editor switches to a different search, so when the Editor reaches the final confirmation page, all Reviewers selected after each ‘Change Search Type’ action are presented simultaneously.

![Image of the Reviewer Candidates screen](image)

<table>
<thead>
<tr>
<th>Select As</th>
<th>Name</th>
<th>Editor</th>
<th>Board</th>
<th>Correspondence</th>
<th>Reviewer Stats</th>
<th>Peer</th>
<th>Pending Invitations</th>
<th>Reviewer Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Joe D. (Editor)</td>
<td></td>
<td></td>
<td>Abc.</td>
<td>Reviews in Progress: 3</td>
<td></td>
<td>Outstanding Invitations: 1</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>John D. (Editor)</td>
<td></td>
<td></td>
<td>Abc.</td>
<td>Reviews in Progress: 1</td>
<td></td>
<td>Outstanding Invitations: 1</td>
<td>1</td>
</tr>
</tbody>
</table>

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Linking Submissions

This new feature is designed to provide Editors with a method of linking submissions together for general reference (those that are related by Author or topic) or to group Letters to the Editor together to take advantage of special functionality. For example, the Editor can link a series of manuscripts submitted by the same Author. Or, the publication office can link a group of submissions that need to be processed together. New linked submission icons are displayed next to linked submissions in Editor folders, providing immediate visibility to the fact that the submission is in a ‘Linked Submission Group’.

At any point in the editorial process, the Editor may identify submissions that are related to each other by topic, Author, or some other criteria, and decide to link them together as part of a Linked Submission Group (“Group”). To get started by creating a new group, the Editor (with ‘Create/Edit Linked Submission Groups’ RoleManager permission) clicks the Linked Submissions action link on the relevant submission from any Editor folder.

The user is taken to the Add to/Create Linked Submission Group page, where he can click the ‘Create a New Group’ button to set up a new Group.

The user enters the ‘Linked Submission Group Name’ and selects the ‘Linked Submission Group Type’ to create the Group; either ‘Linked With’ for general linking, or ‘Letter to the Editor’ to take advantage of special ‘Letter to the Editor’ functionality.

NOTE: Once the Group has been created, it is available for selection in the drop-down list on the Add to/Create Linked Submission Group page. Additional submissions can be added to the group at any time.

NOTE: The ‘Assign Publish With ID’ is a separate feature discussed in the Publishing Submissions Together section of this document.
Once you have created your Group, you can select it in the ‘Add submission to a group’ drop-down, and click the ‘Add to Group’ button to add your submission to the group.
Once a submission has been added to a Group, it displayed on the Linked Submissions page, and a Linked Submissions icon is displayed in search results and system folders.

Linked Submissions page:
Linked Submissions icon in search results:

On the **Linked Submissions** page, Editors with permission to ‘Create/Edit Linked Submission Groups’ can click the **Add Submission** link associated with a group to use a new Search Submissions feature to look up submissions to add them to the group.

Three new search criteria are available in addition to the existing criteria:
1. Linked Submission Group Name
2. Publish With ID
3. Publish With ID Description

A checkbox is displayed for each submission returned in the results. The Editor selects the submissions they wish to add to the group, and clicks the ‘Add to Group’ button.

NOTE: The ‘Select’ checkbox is suppressed for submissions that already belong to the Group.

The Editor is taken back to the Linked Submissions page, where the selected submission(s) are added to the group.
On the **Linked Submissions** page, Editors with permission to ‘Create/Edit Linked Submission Groups’ can perform the following actions. For simplification purposes, partial screenshots are shown.

1. Create a new Group that contains the submission from which they got to this page (the ‘referring’ submission). After creating the new Group, the user is returned to the **Linked Submissions** page and the newly created Group is selected by default.

2. Add the referring submission to an existing group by selecting a Group from a drop-down selector near the top of the page.
3. Search for other submissions to add to an existing group by clicking the Add Submission link (as described above).

4. Modify an existing Group (e.g. Group Name, Group Type, or remove submissions from the Group) by clicking the Edit Linked Group action link.

5. Remove all Linked Submissions from a Group at once by clicking the Clear Group link. When this link is clicked, a warning is displayed so the user can confirm his intent to remove all submissions from the Group.
6. Users with permission to ‘Set Active/Inactive Status for Linked Submission Groups’ may ‘Activate’ any inactive Group by clicking the Set Active Status link, or ‘Inactivate’ any active Group by clicking the Set Inactive Status link. When either of these links are clicked, a warning is displayed so the user can confirm his intent to activate/inactivate the Group.

- When a Group is made ‘active’, submissions can be added to the Group.
- When a Group is made ‘inactive’, submissions can no longer be added to the Group.

7. Remove an individual submission from a Group by clicking the Remove from Group link. When this link is clicked, a warning is displayed so the user can confirm his intent to remove the submission from the Group.
8. Assign a PWID by clicking the ‘Publish With ID’ button.

- NOTE: The ‘Assign Publish With ID’ is a separate feature discussed in the Publishing Submissions Together section of this document.
Editors with ‘view only’ access to Linked Submission Groups (i.e. ‘View Linked Submission Groups’ permission is enabled but ‘Create/Edit Linked Submission Groups’ is not enabled) see a version of the Linked Submissions page where they can view information about the linked Groups, but cannot edit the Group in any way.

<table>
<thead>
<tr>
<th>Linked Submission Group</th>
<th>Linked Submission Group Name</th>
<th>Vascular Surgery submissions for August 2006</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Manuscript Number</td>
<td>Article Type</td>
<td>Article Title</td>
</tr>
</tbody>
</table>

Editor Roles with permission to ‘View Linked Submission Groups’ will see a new ‘Linked Submission Groups’ section on the Editorial Menu.
Clicking the Active Linked Submission Groups action link on the Editorial Menu takes the user to the new Active Linked Submission Groups page. Note that the links displayed in the Action column are dependent on RoleManager permissions.
Clicking the Inactive Linked Submission Groups action link on the Editorial Menu takes the user to the new Inactive Linked Submission Groups page. Note that the links displayed in the Action column are dependent on RoleManager permissions.

Publisher Roles can be given ‘view only’ access to Linked Submission Groups. When the RoleManager permission ‘View Linked Submission Groups’ is enabled, the user sees a new ‘Linked Submission Groups’ section on the Publisher Main Menu (just like the Editorial Menu), with two new folders: Active Linked Submission Groups and Inactive Linked Submission Groups.
Clicking the **Active Linked Submission Groups** link on the Publisher Main Menu navigates the user to the *Active Linked Submission Groups* page.

- **NOTE:** This is the same version of the page that Editors with ‘view only’ permission would see.

Clicking the **Inactive Linked Submission Groups** link on the Publisher Main Menu navigates the user to the *Inactive Linked Submission Groups* page.

- **NOTE:** This is the same version of the page that Editors with ‘view only’ permission would see.

Publisher Roles also see the **Linked Submissions** action link and linking icons in the
Accepted Submissions folder.

Clicking the Linked Submissions action link takes the Publisher to the Publisher Linked Submissions page where all Groups that the submission belongs to are displayed.

- NOTE: This page is similar to the page that Editors with ‘view only’ permission would see, except for some of the action links.

Linked Submissions for Manuscript Number JOURNAL-22.

Contents: Submissions that are linked to JOURNAL-22. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.
TO CONFIGURE:

A new ‘Linked Submission Policies’ heading is displayed on the PolicyManager Main Menu, with a new action link Configure Linked Submission Group Name Preferences.
On the Configure Linked Submission Group Name Preferences page, the Administrator enters the number of characters that the Linked Submission Group Name will be limited to when an Editor creates a new Linked Submission Group (maximum 1000).

Configure Linked Submission Group Name Preferences

Please enter a field length for the Linked Submission Group Name value. The character length of Linked Submission Group Names is limited to the value entered.

Field Length: [1000] (Maximum Field Length of 1000)

The next step is to go to Editor RoleManager and enable the appropriate permissions for Editors to link submissions together. There are three new permissions related to linked submissions.

1. ‘View Linked Submission Groups’ – This is the “base” permission that allows an Editor to see the Linked Submissions section on the Editorial Menu, as well as the Linked Submissions action link and linked submission icons once a submission has been linked into a Group.
2. ‘Create/Edit Linked Submission Groups’ – This permission works in conjunction with the ‘View Linked Submission Groups’ permission. If enabled, the Editor can create a new Linked Submission Group, as well as edit an existing one.
3. ‘Set Active/Inactive Status for Linked Submission Groups’ – This permission works in conjunction with the ‘Create/Edit Linked Submission Groups’ permission. If enabled, the Editor can set an inactive status on an active Linked Submission Group, or set an active status on an inactive one.
If you want Publisher Roles to be able to see Linked Submissions, enable the new Publisher RoleManager permission ‘View Linked Submission Groups’. If enabled, the Publisher can see the Linked Submissions section on the Publisher Main Menu, as well as the Linked Submissions action link and linked submission icons in his Accepted Submissions folder once a submission has been linked into a Group and had a Final Disposition of ‘Accept’ set on it.
Publishing Submissions Together

EM now supports the ability to assign a special ID to submissions that should be published together. This is an extension of the new Linked Submissions feature described previously in this document.

Submissions in a Linked Submission Group (“Group”) can also be assigned to a Publish With ID (“PWID”). This supplemental grouping mechanism indicates that all linked submissions assigned to the same PWID should be published together. The PWID is assigned to a submission either automatically by the system or manually by the Editor (configurable in PolicyManager). A special icon is displayed next to submissions assigned to a PWID in Editor folders, providing immediate visibility to the fact that a ‘Publish With ID’ has been assigned to the submission. Hovering over this icon displays the text “Publish With ID Assigned”. Linked Submissions with the same PWID can be displayed on the transmittal form and can be included as part of the metadata released to production.

Editors with permission to ‘Create/Edit Linked Submission Groups’ can assign a PWID to a linked submission on the Add to/Create Linked Submission Group page.

Editors with this permission can also assign a PWID to linked submissions on the Linked Submissions pages. This is achieved by selecting the ‘Publish With’ checkbox for each submission you want to assign a PWID and clicking the ‘Assign Publish With ID’ button.
Additional PWID Details:

1. An Assign ID link is displayed for submissions that are part of the group, but were not checked off when the ‘Assign Publish With ID’ button was used to generated the PWID.

2. If a submission is added to a Group after the PWID has been generated for the group, an Assign ID link is displayed in the ‘Publish With ID’ column to facilitate assigning the PWID associated with the Group to the submission.

3. A submission may belong to multiple Linked Submission Groups, but can only be assigned one PWID. Once a PWID has been assigned to a submission that is part of multiple Groups, the PWID associated with the submission is displayed in the ‘Publish With ID’ column of all the groups the submission is a part of and the ‘Publish With’ checkbox is not displayed. This prevents an Editor from attempting to assign a PWID to a submission that already has one as part of another group.

4. If a PWID has been created for the referring submission as part of one of the Groups displayed on the Linked Submissions page, the ‘Publish With’ checkboxes for submissions belonging to other groups on the page are suppressed, and an Assign ID link is displayed for them.

5. Each submission that has a PWID assigned to it displays a Remove ID link in the ‘Publish With ID’ column that facilitates removing the PWID from the submission if necessary.

6. If the PWID is removed from a submission, an Assign ID link is displayed in the ‘Publish With ID’ column to facilitate assigning the PWID associated with the group to the submission.

7. If the PWID is removed from all submissions that are part of a Linked Submission Group, the PWID cannot be reused by journals using the ‘Automatic’ Publish With ID numbering format. A journal using the ‘Manual’ Publish With ID...
numbering format could assign that PWID to another group of linked submissions if desired.

Example 1: Linked Submissions page display; with submissions linked in each group type, and a Publish With ID assigned – Note JOURNAL-41, which is part of the group, but was not selected as a submission to be assigned the Publish With ID, and JOURNAL-44 which was added to the group after a Publish With ID had already been assigned. The ‘Create/Edit Linked Submission Groups’ and ‘Set Active/Inactive Status for Linked Submission Groups’ RoleManager permissions are enabled for the Editor: (Note: The Assign Publish With ID button is not displayed, because the referring submission currently has a Publish With ID assigned to it).
Once a submission is in a Group, the Editor can assign a PWID by selecting the ‘Publish With’ checkbox for the referring submission and any number of other linked submissions on the Linked Submissions page. The target page varies, depending on whether the publication is configured for ‘manual’ or ‘automatic’ PWID assignment in PolicyManager.

If PWID is assigned manually, the Editor is taken to the Assign With Publish ID page where he can enter the PWID and PWID Description.

**Assign Publish With ID**

A Publish With ID may contain any mix of letters and numbers (100 characters max).

The Publish With ID Description may contain any mix of letters and numbers (90 characters max) and is used to label linked submissions that share this Publish With ID for the Publisher.

[Assign Publish With ID interface]

NOTE: The ‘Publish With ID Description’ must be within the character limit configured on the Configure Publish With ID Description Preferences page in PolicyManager.
The Editor may also modify a PWID and/or PWID Description that has already been assigned, by clicking the text link displayed for the PWID of the referring submission on the Linked Submissions page.

**Assign Publish With ID**

A Publish With ID may contain any mix of letters and numbers (100 characters max).

The Publish With ID Description may contain any mix of letters and numbers ([x] characters max) and is used to label linked submissions that share this Publish With ID for the Publisher.

<table>
<thead>
<tr>
<th>Publish With ID</th>
<th>Publish With ID Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PWID-00000046</td>
<td>Surgery Submissions</td>
</tr>
</tbody>
</table>

If PWID is assigned **automatically**, the Editor is taken to the Assign With Publish ID page where he can see the PWID and enter the PWID Description. Note the PWID is assigned by the system and cannot be modified.

**Enter Publish With ID Description**

The Publish With ID Description may contain any mix of letters and numbers ([x] characters max) and is used to label linked submissions that share this Publish With ID for the Publisher.

<table>
<thead>
<tr>
<th>Publish With ID</th>
<th>Publish With ID Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PWID-00000007</td>
<td></td>
</tr>
</tbody>
</table>

The Editor may also modify a Publish With ID Description that has already been assigned, by clicking on the text link displayed for the Publish With ID Description of the referring submission on the Linked Submissions page.

**Enter Publish With ID Description**

The Publish With ID Description may contain any mix of letters and numbers ([x] characters max) and is used to label linked submissions that share this Publish With ID for the Publisher.

<table>
<thead>
<tr>
<th>Publish With ID</th>
<th>Publish With ID Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PWID-00000019</td>
<td>Oct 2006 Submissions</td>
</tr>
</tbody>
</table>
Submissions that have had a Final Disposition of Reject set on them before a PWID has been assigned do not display the ‘Publish With’ checkbox in the ‘Publish With ID’ column, and the ‘Publish With’ text is grayed out in the ‘Publish With ID’ column. So if a submission is intended to be published with others, the PWID should be generated for the linked submission before a Final Disposition is set on any of the linked submissions in the group.

Submissions that have a Final Disposition of Accept set on them after a PWID was assigned display a Remove ID link next to the PWID in the ‘Publish With ID’ column. When a Final Disposition of Accept is set on a submission that has a PWID, a ‘Linked Submissions’ section is displayed on the transmittal form, and the linked submission fields (Publish With ID and Publish With ID Description) are transmitted as part of the metadata to production.

Submissions accepted for publication (Final Disposition set to ‘Accept’) that have been assigned a PWID automatically display on the transmittal form.

TO CONFIGURE:
Go to the new ‘Linked Submission Policies’ section in PolicyManager and click the Configure Publish With ID Preferences link. Then choose whether the Publish With ID (PWID) is assigned automatically by the system, or manually by the Editor. ‘Manual’ is selected by default.

If you select the ‘Automatic’ option and click the ‘Submit’ button, you are taken directly to the Set Automatic Publish With ID Format page. On this page, you can enter a prefix (optional), starting number (required), and field length (also required) that is used by the system to automatically generate the PWID.
Leading zeros are accounted for with the ‘Display leading zeros in the Publish With ID number’ option. Selecting this checkbox ensures that leading zeroes are inserted in front of automatically generated PWIDs.

The next step is to click the Configure Publish With ID Description Preferences link in the ‘Linked Submission Policies’ section of PolicyManager. On this page, you can enter the maximum limit for PWID Description entered by Editors.
Letters to the Editor Functionality

EM now supports the management of Letters to the Editor, where unsolicited submissions are received in response to an already published paper. This is an extension of the new Linked Submissions feature described previously in this document.

Letters to the Editor linking includes specialized ‘rules’, further distinguishing it from ‘general’ (Linked With) submission linking:

1. When a commentary is solicited from one of the submissions linked together using the Letter to the Editor linking mechanism, it is possible for the Author of the commentary (the Author of the original published article) to submit a ‘response back’ paper that will become a member of the Group.

2. When an Invited Author submits a commentary where the invitation was generated from a submission belonging to a Letter to the Editor Group, his invited commentary is automatically added to the Letter to the Editor Group by the system, and is displayed accordingly on the Linked Submissions page. The ‘response back’ commentary (Reviewer PDF) can be made available to the Authors of selected submissions in the group when a decision is made on their Letter to the Editor.

Typical Letter to the Editor Scenario:

A submission is received, and eventually published. Letters to the Editor (solicited or unsolicited reactions to that submission) are received by the Editorial Office.

The Editorial Office wishes to link these ‘reactionary’ Letters to the Editor to the published submission and make them available to the Author of the published submission.

A Letter to the Editor is received in response to a published paper.

The Editorial Office can link this Letter to the Editor to the published paper using the Linked Submissions link.
Add to/Create Linked Submission Group

A submission may be added to an existing Linked Submission Group, or added as the first submission in a newly created Linked Submission Group.

To add the submission to an existing Linked Submission Group:
Please select a Linked Submission Group from the drop-down below and click the 'Add to Group' button. Note: A submission can only belong to one Letter to the Editor Group.

Please Select a Linked Submission Group:  
[Dropdown]
Add to Group

To create a new Linked Submission Group:
Click the 'Create a New Group' button to create a new Linked Submission Group that you can add your referring submission to.

Click the 'Create a New Group' button to create a new Linked Submission Group that you can add your referring submission to.

Once created, the new Linked Submission Group will be selected by default in the drop-down menu above. Clicking the 'Add to Group' button will then add the referring submission to the newly created group.

Assign Publish With ID:
Click the 'Assign Publish With ID' button to assign a Publish With ID to your referring submission.

Assign Publish With ID

Click to create a new ‘Letter to the Editor’ group that you can add the Letter to the Editor to.
Create a New Linked Submission Group

To create a new Linked Submission Group

Please enter a Linked Submission Group Name (limit of 100 characters) and select a Linked Submission Group Type.

**Linked With Group:** A general group suitable for linking submission together for a wide variety of uses (e.g., submissions by the same Author or submissions based on a similar topic.)

**Letter to the Editor Group:** A ‘speciality’ group where Invited Authors may be provided PDF access to other linked submissions that belong to the group when they are solicited for a commentary. **Note:** A submission can only belong to one Letter to the Editor Group.

Once the new Linked Submission Group has been created, it is selected to the Create Linked Submission Group page. Clicking the ‘Add to Group’ button on the Submission Group page will then add the submission to the newly created group.

**Linked Submission Group Name:**

Enter a Group Name

**Linked Submission Group Type:**

Select a Group type

**Submit the Group**

The Published submission can then be added to the group

The Letter to the Editor has been added as the first submission in the group
The Author of the original, published submission can then be invited to submit a ‘reply’ based on any of the linked Letters to the Editor.

This is done by Soliciting a Commentary from the Author based on their original published submission, or any of the Letters to the Editor linked to it in the ‘Letter to the Editor’ group.
Editors with the ‘Invite Authors/Solicit Commentaries’ RoleManager permission enabled for their role can invite an Author to submit a manuscript based on an existing submission using the Solicit Commentary feature.

When a submission is linked into a ‘Letter to the Editor’ Group, the Solicit Commentary feature is enhanced to notify an Editor that the submission is part of such a Group, and allows him to provide the Invited Author with PDF access to any of the linked submissions in the Group.

A new Linked Submission Notice Page is accessed as part of the Solicit Commentary process.

This page displays all of the submissions currently linked as part of the Letter to the Editor group.
Once invited, the Author has access to the Linked Submissions (including the selected Letters to the Editor) from their ‘My New Invitations’ folder.

The Author is provided with access to an ‘Author version’ of the Linked Submissions page.

This access is carried over into the ‘My Accepted Invitations’ folder if the Author agrees to submit.
When the Invited Author submits his commentary, it is flagged by the system and automatically added to the ‘Letter to the Editor’ Group of its ‘parent’ submission belongs to. A submission may only belong to one Letter to the Editor Group.

A special linking icon is displayed next to linked submissions in a ‘Letter to Editor’ Group, providing immediate visibility to the fact that the submission is in a ‘Letter to Editor’ Group. Hovering over this icon displays the text “Member of a Letter to the Editor Group”.

Click the Linked Submissions link to see all of the submissions in the Letter to the Editor group:
When a decision is made on any of the Letters to the Editor in the ‘Letter to the Editor’ Group, the Notify Author step includes the ability to provide the Author receiving the decision letter with access to all of the linked submissions. A new option; ‘Provide Corresponding Author with PDF Access to Related Commentaries’ is displayed.
Because the ‘reply back’ from the published Author was automatically linked into our group, the Author of the Letter to the Editor will have access to it.

The Author who receives the decision letter has access to an ‘Author version’ of the Linked Submissions page.
Linked Submissions page for Authors:

A new merge field; %LINKEDCOMMENTARYDEEP_LINK% is available for use in Editor Decision letters.

This merge field inserts a deep link into the decision letter.

If an Editor has granted the Corresponding Author access to the PDFs, the deep link provides that Author with access to the Author version of the Linked Submissions page without having to manually login to the system.

The Author can download the PDF for any linked submission that belongs to the same Letter to the Editor Group as their submission.

TO CONFIGURE:
The same Configure Linked Submission Group Name Preferences page in PolicyManager used for general (Linked With) Groups is also used for Letter to the Editor Groups.

Configure Linked Submission Group Name Preferences

Please enter a field length for the Linked Submission Group Name value. The character length of Linked Submission Group Names is limited to the value entered.

Field Length: 1000

(Maximum Field Length of 1000)

Once the maximum number of characters allowed for Linked Submission Group Name has been specified, go to Editor RoleManager to enable the appropriate permissions. Here again, the permissions related to Letters to the Editor Groups are shared with general (Linked With) submission linking:
1. ‘View Linked Submission Groups’ – This is the “base” permission that allows an Editor to see the Linked Submissions section on their main menu, as well as the Linked Submissions action link and linked submission icons once a submission has been linked into a Linked Submission Group.
2. ‘Create/Edit Linked Submission Groups’ – This permission works in conjunction with the ‘View Linked Submission Groups’ permission. If enabled, the Editor can create a new Linked Submission Group, as well as edit an existing one.
3. ‘Set Active/Inactive Status for Linked Submission Groups’ - This permission works in conjunction with the ‘Create/Edit Linked Submission Groups’ permission. If enabled, the Editor can set an inactive status on an active Linked Submission Group, or set an active status on an inactive one.

Edit Role Definition

Role Name: Editor-in-Chief

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- System Conversion Tasks

General Searching and Viewing

Use Editorial Details Layout: All Editorial

- Search All Manuscripts
- Search Only Assigned Manuscripts
- View Linked Submissions Groups
  - Create/Edit Linked Submission Groups
  - Set Active/Inactive Status on Linked Submission Groups
Journal-centric Language Removed

Throughout Editorial Manager (version 6.0) the terms ‘journal’ and ‘journal office’ are used frequently in onscreen instructions and in other parts of the user interface. This language may be limiting for other types of publications that use EM, such as books, learning aids, self-assessment programs, etc.

Also, the term ‘manuscript’ is used throughout the system, when the word ‘submission’ generally more accurately refers to conference submissions, book chapters, etc.

In version 6.1, the language on many Editorial Manager pages has been changed to be more generic, so that the instructions and other language makes sense for all types of EM customers. In general, the term ‘journal’ has been changed to ‘publication’, and the term ‘journal office’ has been changed to ‘editorial office’.

The term ‘manuscript’ has also been changed to ‘submission’, where appropriate. For example, the ‘Manuscript Number’ that appears on virtually all EM pages is not changed to ‘Submission Number’, and the ‘Submit Manuscript’ interface used by Authors is not changed to ‘Submit Submission’. However, the default Author instructions have been changed to say ‘submission’ instead of ‘manuscript.

The terminology has been modified only on the general pages accessed by Authors and Editors, where appropriate. Reviewer and Publisher-facing pages have not been changed. Terminology has not been changed in the following areas of the system, due to the complexity of implementing the changes:

1. Custom Instructions - The editorial office has the ability to customize the Author instructions, and the customized instructions may contain journal-centric language. This enhancement does not change any language that has been customized by the editorial office; only the default instructions are changed.
2. Merge Fields
3. Reports
4. System Administration
5. Help Documentation (Note: The terminology will be modified on an ongoing basis via the existing documentation maintenance procedures.)
6. Navigation bar graphics (sample shown below). Note that publication graphics are maintained by the Customer Service group. In the event that an existing customer or potential customer wishes to change ‘Journal Overview’ to some other text, the request would be routed to, and implemented by, Customer Service.

Sample Author-facing pop-up page with the term ‘journal office’ changed to ‘editorial
Sample Editor-facing page with the term ‘journal’ changed to ‘publication’.

TO CONFIGURE: None required.
PROPOSAL ENHANCEMENTS
Proposal Menu as Default Menu

In current functionality, an Editor user can be configured with the ‘Editorial Menu’ or ‘Production Menu’ as the default menu when he logs into Editorial Manager (the menu that is initially displayed when he logs in).

Under new functionality, Editor users can now choose to have the ‘Proposal Menu’ be the default menu.

TO CONFIGURE:
Go to the Search People – Update Information page for the user who wants the Proposal Menu to be automatically displayed when he logs in. Go to the ‘Default Login Menu’ drop-down list and select the new ‘Proposal Menu’ option. Then click the ‘Submit’ button to save the change.
Create Proposal without Building PDF

In EM version 6.0, creating a Proposal requires the user to build a submission file into a PDF. First, the Editor clicks the Initiate Proposal link on the Proposal Menu and is taken to the Target Publication Schedule page to begin the process of proposal creation. The Editor enters target publication information and other data, and then clicks the ‘Proceed’ button which navigates to a confirmation page. Once the Editor clicks ‘Confirm Dates and Proceed’ on the confirmation page, the information is saved, and the Editor is taken to the manuscript submission interface to build a Proposal submission and related PDF.

New in EM version 6.1, a Proposal can be created, assigned to an Editor, and Authors invited without having to go through the steps of building and approving a PDF.

The Target Publication page (reached when the Initiate Proposal link is clicked) is renamed Initiate Proposal, and is enhanced to support Proposal creation without building a PDF. Two new buttons are displayed:

- ‘Proceed with no PDF’ - Sends the Proposal to the New Proposals Requiring Assignments folder and displays a new Proposal Confirmation page.
- ‘Assign to Myself and Invite Authors’ - This button is shown only to Editors with the RoleManager permissions ‘Invite Authors’ and ‘Receive Assignments in New Assignments folder’. Clicking the button creates the Proposal and takes the Editor directly to the Author Selection Summary page.
  - If the publication is configured for manual manuscript numbering, a manuscript number must be entered on the Initiate Proposal page before the user can proceed to the Author Selection Summary page.
  - If the publication is configured for automated manuscript numbering, the manuscript number is automatically assigned when the ‘Assign to Myself and Invite Authors’ button is clicked and the user proceeds to the Author Selection Summary page.
- The existing ‘Proceed’ button is renamed ‘Proceed and Build PDF’. Clicking this button allows the Editor to upload a Submission Item and build it into a PDF for the Proposal, as in EM version 6.0.

Note the following additional changes to make the Initiate Proposal page comprehensive:

- Article Type drop-down menu - The Proposal Article Type must now be chosen at this stage in the process.
- Article Title text entry area – The Proposal Title must now be entered on this page.
- Author Submission Due Date - This information is now displayed on this page if the Author’s due date is dependent on the ‘Number of Days prior to Target Publication Date’.
NOTE: The existing page *Confirmation of Target Publication Schedule* is removed from the system and no longer appears during the Proposal creation process. All information appearing on this page in EM version 6.0 has been relocated to the *Initiate Proposal* page.

If the user clicks ‘Proceed with no PDF’, a new confirmation page is displayed.

NOTE: If the user creates the Proposal without building a PDF, the *View Proposal* link is not shown in the system, because there is no PDF to be viewed.

TO CONFIGURE: No configuration is necessary.
Send Multiple Invitations to the Same Author

In EM version 6.0, an Author may be invited to respond to a proposal or to submit a commentary on an existing submission. The Author can be invited only once for a particular submission, but can be re-invited if he declines.

In EM version 6.1, this feature is enhanced to allow multiple invitations to be sent to the same Author for a particular proposal or submission. The Editor can now enter the ‘Number of Invitation Letters’ to be sent to each Author on the Search for Authors page. The Author can also be invited multiple times after the initial invitation. This allows the Author to submit multiple manuscripts in response to a proposal or commentary.

NOTE: Each invitation letter is sent individually, and can be customized.

If an Author has been invited multiple times, his name appears multiple times on the Author Selection Summary page, with the color-coded status and status date for each individual invitation.
NOTE: Clicking the Un-invite link un-invites the Author from that specific invitation only; it does not un-invite the Author from any other invitations associated with the submission.

If an Author is invited multiple times, he will see each individual invitation in the My New Invitations folder on the Author Main Menu.

The Author Invitation Status Report and Authors Invited – No Response Report also display the multiple invitations.
Increased Flexibility Sending Author Invitation Letters

In EM version 6.0, the Editor can send a letter to the Invited Author(s) at the time of invitation. This letter is configured in ActionManager (for the ‘Invite Authors for Proposal’ event or the ‘Solicit Commentary on Submission’ event) and can be customized by the Editor before sending.

In EM version 6.1, this feature is enhanced so that the Editor can choose from more than one letter at the time of Author invitation. The Editor’s letter choices are limited to those in the new ‘Author Invitation’ Letter Family, rather than having to choose from all letters in the system. The Editor will also have visibility to the Author’s Unavailable Dates (and may therefore decide not to invite a particular Author), and can distinguish between ‘Authors to Invite’ and ‘Others Notified of Author Invitation’.

After the Editor has selected Authors to invite and clicks the ‘Proceed’ button, he is taken to a new page where he can select and customize multiple letters.

- The ‘Letter’ column contains a drop-down list of all letters assigned to the new ‘Author Invitation’ Letter Family. Any of the letters assigned to this family may be selected (and customized if desired), and used as the invitation letter.
- Letters sent to non-Author roles are segregated into a separate section of the page, headed ‘Others Notified of Author Invitation’.
  - NOTE: These additional letters are the ones configured for the ActionManager events ‘Invite Authors for Proposal’ or ‘Solicit Commentary on Submission’ for non-Author roles.
NOTE: This new page replaces the 6.0 pages Select Authors – Customize Letters and Select Authors – Default Letters reached when the Editor clicks the ‘Proceed’ button on the Search for Authors page.

TO CONFIGURE:
No configuration is necessary if your publication already has letters associated with the ActionManager events ‘Invite Authors for Proposal’ and ‘Solicit Commentary on Submission’ in version 6.0 (these letters will be automatically assigned to the new ‘Author Invitation’ letter family).

However, if you want to create new letters for use with Author Invitation functionality in version 6.1, you must assign the new letter(s) to the new Letter Family so that they will be available for selection on the Select Authors – Confirm Selections and Customize Letters page. To do this, click the Edit Letters link in PolicyManager and click the ‘Add’ button to create a new letter. You can also assign existing letters to the ‘Author Invitation’ letter family by clicking the Edit link on the Edit Letters page.
Send Ad Hoc E-mails for Proposals

For all Editors with RoleManager permission to ‘Send Ad Hoc E-mail’, the Send E-mail link is added to the following folders on the Proposal Menu:
1. New Proposals Requiring Assignments
2. New Assignments – Proposals
3. My Pending Proposals
4. View All Assigned Proposals
5. My Completed Proposals
6. View All Completed Proposals
7. Search Proposals

When the user clicks the Send E-mail action link, the Send Ad Hoc E-mail pop-up page is launched. Only letters assigned to the new ‘Ad Hoc for Proposal’ letter family are available for selection.

TO CONFIGURE:

Go to the Edit Letters page in PolicyManager and click the ‘Add’ button to create a new letter. Select ‘Ad Hoc for Proposal’ in the Letter Family drop-down list and proceed to create the letter.
NOTE: When the publication upgrades to version 6.1, there are no letters assigned to this Letter Family. If no ‘Ad Hoc for Proposal’ letters are created, the **Send E-mail** link will not be shown on Proposal pages.
Search Proposals

In EM version 6.0, the Editor user can search for manuscripts by clicking the Search Submissions action link, but Proposals are not available for searching.

In version 6.1, Editors with RoleManager permission to ‘Search All Proposals’ can see a new Search Proposals action link on the Proposal Menu.

Clicking the Search Proposals link takes the user to a new page similar to Search Submissions, where the user can enter desired selection criteria related to Proposals. Like Search Submissions, the user can enter an unlimited number of search parameters and save the search criteria for future use.
NOTE: Target Publication Date, Volume and Issue all pertain to the Proposal parent submission; not any child submissions associated with the Proposal.

The results of the Proposal search are limited to submissions in the ‘Proposal’ Article Type Family, with a link to View Related Submissions associated with the Proposal.

TO CONFIGURE:

Go to Editor RoleManager and enable the new permission ‘Search All Proposals’ for the desired Editor Role(s). This new permission is not automatically enabled for any roles when the publication upgrades to version 6.1.
New Deep Links for Author Invitations

A ‘deep link’ is a merge field that Editors may include in an e-mail notification sent from EM. The recipient of the e-mail can click on the hyperlink in the e-mail body and be taken directly to the relevant page in the system.

Three new deep links are added in EM version 6.1 for use with Author invitation functionality. These links are intended to be included in Author invitation letters.

1. %ACCEPT_INVITATION% - When an invited Author clicks the deep link in the e-mail received from EM, the system determines whether the invitation is still in a state where it can be accepted. If it is, the Author is automatically logged in and taken directly to the Accept Invitation page.

   If the invitation is not still in a state where it can be accepted, the user is not logged in and is presented with an informational message indicating that the invitation is no longer in a status where it can be accepted.

2. %DECLINE_INVITATION% - When an invited Author clicks this link in the e-mail received from EM, the system determines whether the invitation is still in a state where it can be declined. If it is, the Author is automatically logged in and taken directly to the Decline Author Invitation page.

   If the invitation is not still in a state where it can be declined, the user is not logged in and is presented with an informational message indicating that the invitation is no longer in a status where it can be declined.
3. `%SUBMIT_INVITED_MANUSCRIPT%` - When an invited Author clicks this link, the system determines whether the invitation is still open (the submission still appears in the *My New Invitations* or *My Accepted Invitations* folder). If the invitation is still open, the invitation is automatically marked as accepted and the Author is logged in and taken to the Manuscript Submission interface.

If the invitation is not still open, an informational message is shown, informing the Author of possible causes of the problem.

**TO CONFIGURE:**

Click the *Edit Letters* link in the ‘E-mail and Letter Policies’ section of PolicyManager. Then click the *Edit* link to modify an existing Author Invitation letter, or click the ‘Add’ button to create a new letter. Insert the new deep link merge field(s) in the desired Author Invitation letters.
PRODUCTION TRACKING ENHANCEMENTS

Target Publication Information for Individual Submissions

In EM version 6.0, the Target Publication Date, Target Publication Volume and Target Publication Issue (collectively referred to as “Target Publication Information”) are assigned to a Proposal or a submission with commentaries (‘parent’ submission). Those same values are also displayed for all the invited submissions received that are associated with the parent (‘child’ submissions). The child submissions do not have their own Target Publication Information values. Therefore, if you change the Target Publication Information on any one of the submissions, you are changing the value displayed for all of the associated submissions (parent and children).

Submissions assigned to a Production Tracking Schedule Group are assigned the target information pertaining to the Schedule Group.

Some publications use Custom Reports to retrieve the Target Publication Information, but it is only available for the parent submissions of commentaries. There is a separate field in the system (available for Production Tracking users only) called ‘Submission Target Online Publication Date’. This date is editable and can be modified for each individual parent and child submission. However, this field is not currently available via Custom Reports.

New in EM version 6.1, each submission has its own individual Target Publication Date, Target Publication Volume and Target Publication Issue information. Changing the information for an individual submission no longer changes it for other associated (parent and children) submissions.

This information, as well as the Submission Target Online Publication Date, is also available via Custom Reports in version 6.1.

In addition, the mail merge field %TARGET_PUB_DATE% pulls in the Target Publication Date associated with an individual submission. When a submission is assigned to a Production Tracking Schedule Group, the Schedule Group’s target information overwrites any pre-existing Target Publication Date, Target Publication Volume and Target Publication Issue values.

NOTE: At upgrade, all submissions that are associated with a Proposal automatically receive the Target Publication Date, Target Publication Volume and Target Publication Issue of the Proposal, and all submissions associated with a commentary receive the Target Publication Date, Target Publication Volume and Target Publication Issue of the parent submission receiving the commentaries. Exception: All submissions already assigned to a Schedule Group receive the Schedule Group’s Target Publication Date, Target Publication Volume and Target Publication Issue at upgrade.

TO CONFIGURE: No configuration is necessary.