CONFIDENTIAL AND PROPRIETARY

Aries Systems Corporation

Release Notification

Editorial Manager/Preprint Manager
7.0 Release Notification
4/8/2009
Subject to Change

Editorial Manager/Preprint Manager 7.0 Release Notification

GENERAL ENHANCEMENTS
Changes to Menu Bar

Version 7.0 provides a number of visual changes to the Menu Bar.

In previous versions of Editorial Manager/Preprint Manager, the version number was displayed to the right of the main menu bar:
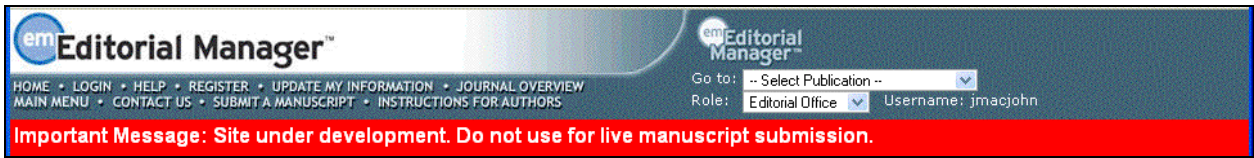
New with 7.0, the version number is no longer displayed here. To view the version number of EM/PM, you can hover the mouse button over the logo. In addition to the version number, additional technical information displays (for example, the Data Server number):
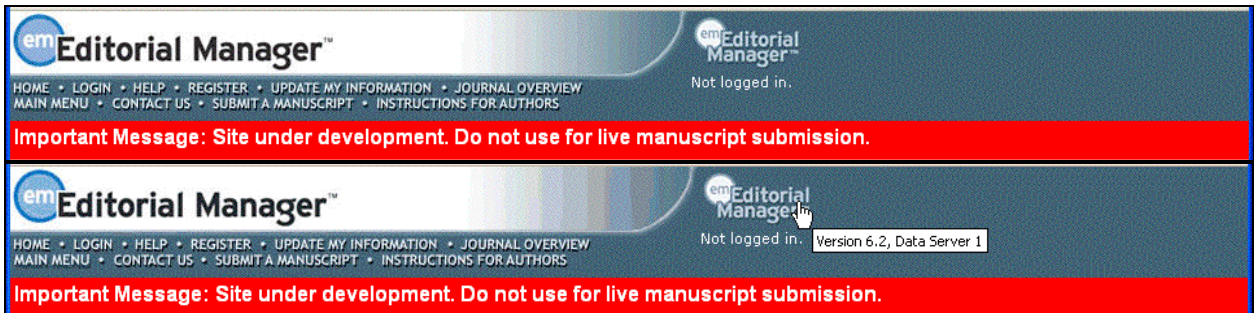
Also new in 7.0, the currently logged-in user's role and username information are rearranged to fit onto a single line:
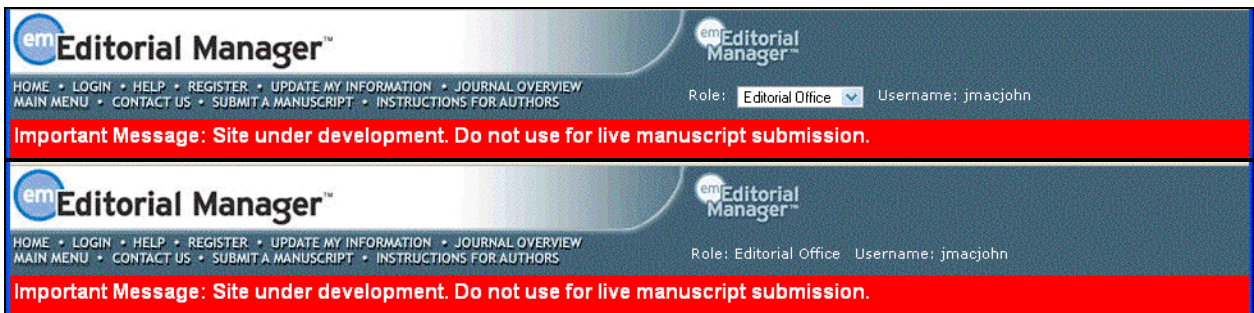
This change makes space for a new 'Go To' drop-down to allow selected user roles to change publications, if enabled for your publication as described below:

Important Message: Site under development. Do not use for live manuscript submission.

TO CONFIGURE:

No configuration necessary, except to display the 'Go To' drop-down menu as described later in this document.

'Go To:' Publication Drop-Down for Editors and Publishers

Publications may now allow Editors and Publishers to easily switch among other publications within a publisher's set of publications. This feature places a new 'Go To' drop-down in the main EM menu containing a list of publications selected by the user, allowing them to switch directly to the desired publication.

This feature is aimed at publications from the same group; therefore, as a security measure only publications owned by the same publisher as your own can be added to the list (the system will warn users if they attempt to add unrelated publications to the list). This feature is only available for use with sites that are on version 7.0 or higher of EM/PM. Sites that have not been upgraded from 6.0 or 6.1 cannot be added to the list of available publications.

If the destination publication is configured correctly, and the user has a matching record with an appropriate role in that publication, then they will be logged in automatically to the destination publication. For example, societies or publishers with editorial staff working on several publications may configure those publications so their staff can log into one publication, then switch to other publications in the group without further login.

On upgrade to 7.0, automatic login is not enabled by default, so all publications in the group need to liaise to allow the relevant roles both to see the Go To: Drop-down to switch *from* one publication; and to be allowed to log *into* the other publication automatically. Individual users must also harmonize their user records on all publications, ensuring key fields in their user record on each publication are identical.

Note that even if automatic login is not allowed for a user role, users can still use the 'Go To:' drop-down to quickly navigate between publications and then manually log into those other publications.

When switching publications, users remain logged into the previous publication and will normally return to the folders in which they were working when they switched publications – note that EM may not be able to return users to some intermediate, in-process pages and will return them to a main menu or folder.

TO CONFIGURE:
Under RoleManager > EditorRole, there is a new 'Cross-Publication Login' section. Check/set the "Access 'Go To:' Publication List" permission for each Role that should be able to use the drop-down. This does not immediately show the drop-down to each user with that Role; they must first build their own list of target publications as described

below.

Layout, Editor RoleManager (Publisher not shown):

Once the drop-down is enabled for a particular role, each user with that role must create their own list of destination publications through the 'Update My Information' page. A new Edit 'Go to' Publication List link appears in the sidebar:

Click this link to display a list of selected publications (the page will be blank initially). To add a publication, type the EM/PM acronym for the publication and click the 'Add' button (i.e. if you type jxyz.edmgr.com or www.editorialmanager.com/jxyz to reach a publication, then the acronym for that publication is 'jxyz'):

Users can only add publications from the same publisher. The system will display an error message if they attempt to add an inappropriate publication to the list:

Note: If a user enters a publication that is not currently using v7.0 or higher, they will receive an error when they try to add the publication.

The system will check whether there is a record in the selected publication that matches the current user's record, based on having identical first name, last name, user name, and password fields plus at least one e-mail address in common. Having such a record is a prerequisite of being able to log in automatically to a target publication, and the system further checks whether an automatic login is possible where matching records exist. For example, Amanda Smith and Mandy Smith do not match (different first names).

Note that publications that use EM/PM's password security policy features to force users

to change usernames and passwords regularly may find that automatic login is prevented by such changes in passwords on separate sites.

Once a list has been created, users may click the 'Copy List to Matching Records' button to transfer this list to the matching records on the listed publications so they do not need to repeat this process on each publication. The current publication is added to the list before it is copied to other publications so that all lists are in synch. We recommend that users set up user records on each publication with matching information before the lists are copied using this button.

Note: Even if users copy the list to a selected publication, the 'Go To' drop-down menu will not appear on the other publications until the site administrator on that publication enables the feature for that role. Only Editor or Publisher roles are eligible to use this feature. As soon as the feature is enabled, users will have access to their previously copied list.

Automatic Login via the 'Go To' list

Selecting a publication from the 'Go To' list will normally take you to the regular login page, unless you have already logged into the destination publication during the current session. With additional preparation it is possible to bypass the normal login process, allowing you to work on multiple publications following a single initial login.

In order to use this single login feature:
- You must have matching records on both publications, where the first name, last name, username, password and at least one e-mail address from each record are identical.
- You must have an Editor or Publisher role on the destination publication.
- The site administrator of that publication must have enabled automatic login to their publication for that role.

TO CONFIGURE:
Under RoleManager > Editor and RoleManager > Publisher, enable the 'Allow Automatic Login to this Role' permission, located in a new 'Cross Publication Login' section. Individual users may only use Automatic login on publications where they have an Editor or Publisher role.

Layout, Editor RoleManager (Publisher not shown):

For each publication a user wishes to automatically log in to:

- The site administrator for each publication must give the relevant Editor or

Publisher role the 'Allow Automatic Login to this Role' setting as described above.

- The user must log in normally to each publication and use 'Update My Information' to set the First Name, Last Name, Username, and Password to the same values. They must ensure that each record includes one e-mail address in common (multiple e-mail addresses may be linked to a single user record).
- The user must use the 'Edit 'Go To' Publication List' link on 'Update My Information' to add the publication to the 'Go To' drop-down, as described above.

The 'Edit 'Go To' Publication List' page for a user also verifies whether they can automatically log in to a site. The 'Matching Record?' and 'Auto Login' columns indicate the login status:

If the 'Matching Record?' column contains 'No', then the user does not have a matching record on that publication, and Automatic Login is not possible (in addition, if they click the 'Copy List to Matching Records' button, that publication will not receive a copy of the list). In this situation, the user must log in to that publication normally and use 'Update My Information' to edit the user information before cross-publication login is possible.

If the 'Matching Record' contains 'Yes', but the 'Auto Login' contains 'No', then either the user does not have an Editor or Publisher role in that publication, or the site administrator has not enabled automatic login for their particular Editor or Publisher role. They should contact the site administrator of the publication to confirm.

If both columns contain 'Yes', then the user will be logged in automatically when they

select that publication from the 'Go To' drop-down.

If both columns contain a question mark, then there has been a problem contacting the publication and the status cannot be determined (i.e. if that site is down).

EXAMPLE:
Assume you have a group of publications, and you want to allow your Editorial Administrators to be able to move between them freely, then:
- The site administrator on each publication should enable both the 'Access 'Go To' Publication List' and 'Allow Automatic Login to the Role' permissions for the Editorial Administrator role.
- The Editorial Administrator should log in to each publication they work on in turn and use 'Update My Information' to enter identical name, login and e-mail information on each one (they may use multiple e-mail addresses, but all publications should have one e-mail in common).
- On the final publication, the Editorial Administrator should click the 'Edit 'Go To' Publication List' link. They should 'Add' each of the other publications that they work on to the list, and confirm they have 'Automatic Login' permission on each. They should click the 'Copy List to Matching Records' button.

PROPOSAL ENHANCEMENTS
Proposal Pipeline Report

A new 'Proposal Pipeline Report' is available on the Reports menu under the 'Author Reminder Reports' section, and also in a new 'Reports' section on the Proposal Menu. This report is primarily designed for publications using the existing 'Proposal' feature. The report allows these publications to track the status of all Proposals in the system, and their related Author invitations and invited submissions.

The publication can retrieve information about all Author invitations and invited submissions related to a Proposal to determine such things as:
1) Have all invited Authors responded?
2) Have all invited submissions been received?
3) What is the editorial status of those invited submissions?

The publication could also run the report on-demand at certain key reporting periods, if desired, to determine the response rate from Authors for invited submissions solicited via Proposals.

After running the report, the report results are displayed on-screen, and may also be downloaded via a link on the page.

TO USE:
The selection criteria page allows the Editor running the report to use criteria related to the Proposal, the invitation, or the invited submission to pull the results. If no criteria are selected, the report will be run using the default criteria of Proposal Handling Editor = 'All Editors', Proposal Status = 'All Statuses', and Invited Article Editorial Status = 'All Statuses'. Running the report in this way will pull information about all Proposals in the publication, along with all their related invitations and invited submissions. The report data may be downloaded to a tab-delimited file (suitable for use with Excel) by clicking the Download the report results link from the results page.

Note: Proposals with a Final Disposition of 'Withdrawn Proposal' are automatically excluded from the results. Proposals with the Final Disposition 'Completed Proposal' and invited submissions with Final Dispositions may be excluded from the results by selecting checkboxes, as explained below.

The results page (and the downloaded file) displays one row for each Proposal/invitation/invited submission combination that meets the selection criteria. In other words, the Proposal, invitation and invited submission are not shown on three separate rows, but rather all together on one row. There are thirty-nine (39) columns displayed on the results page, so it is recommended that the results are downloaded to a file that can then be opened and managed with Excel.

SELECTION CRITERIA:
The following selection criteria relate to the Proposal:
- Proposal Handing Editor
- Proposal Status
- Proposal Manuscript Number
- Proposal Title
- Proposal Target Publication Volume
- Proposal Target Publication Issue
- Proposal Target Publication Date
- Proposal Approved Date
- Proposal Article Type
- Proposal Section/Category

The following selection criterion relate to the Author invitation:
- Author Submission Due Date

The following selection criteria relate to the invited submission:
- Invited Article Title
- Invited Article Editorial Status
- Submission Actual Publication Volume
- Submission Actual Publication Issue
- Submission Actual Publication Date
- Submission Target Publication Volume
- Submission Target Publication Issue
- Submission Target Publication Date
- Submission Article Type (Article Types designated as 'Invited' are available)

The following criteria allow Proposals or invited submissions with final dispositions to be excluded:
- Exclude Proposals with a Final Disposition
- Exclude Invited Submissions with a Final Disposition

Selection Criteria Page

Proposal Pipeline Report

This report displays all Author invitations and invited submissions associated with a proposal. If you select multiple criteria, the results returned will be limited to those invitations and manuscripts that fulfil all of the selected criteria. Incomplete proposals with unapproved PDFs, proposals that are not assigned to an editor, and proposals with a final disposition of 'Withdrawn Proposal' are automatically excluded from the results.

Field	Value
Proposal Handling Editor:	(All Editors)
Proposal Status:	(All Statuses)
Proposal Manuscript Number:	
Proposal Title (contains):	
Proposal Target Publication Volume:	
Proposal Target Publication Issue:	
Proposal Target Publication Date:	from ___ to ___ (mm/dd/yyyy)
Proposal Approved Date:	from ___ to ___ (mm/dd/yyyy)
Author Submission Due Date:	from ___ to ___ (mm/dd/yyyy)
Invited Article Title (contains):	
Invited Article Editorial Status:	(All Statuses)
Submission Actual Publication Volume:	
Submission Actual Publication Issue:	
Submission Actual Publication Date:	from ___ to ___ (mm/dd/yyyy)
Submission Target Publication Volume:	
Submission Target Publication Issue:	
Submission Target Publication Date:	from ___ to ___ (mm/dd/yyyy)

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on yourr keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

Proposal Article Type:
- Proposal for Editorial
- Proposal for Perspective

Select All
Clear All

Proposal Section/Category:
- Main Section
- Letters to the Editor
- Test Section
- Hidden Section

Select All
Clear All

Submission Article Type:
- Original Article
- Brief Report
- Editorial
- Perspective

Select All
Clear All

☐ Exclude Proposals with a Final Disposition

☐ Exclude Invited Submissions with a Final Disposition

Cancel Submit

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RESULTS:
The selection criteria are combined so that the information returned must match <u>all</u> of the selected criteria in order to be shown on the results page and in the downloaded file. For example: Selecting Proposal Handling Editor = 'All Editors', Proposal Status = 'All Statuses', and Invited Article Editorial Status = 'Required Reviews Complete' will return information about Proposals, Author invitations and Invited Submissions only for invited articles that are in the status 'Required Reviews Complete'. Any Proposals that have Author invitations (but no invited articles submitted), or Proposals associated with invited articles that have been submitted, but where the invited article is not in the status 'Required Reviews Complete', are not shown in the results.

The following columns are displayed on the results page and in the downloaded file:

<u>Proposal-related information:</u>
- Proposal Manuscript Number
- Proposal Article Title
- Proposal Section/Category
- Date Proposal Assigned to Handling Editor
- Proposal Handling Editor

<u>Invitation-related information:</u>
- Invited Author Name
- Date Author Invited
- Date Author Agreed
- Date Author Declined
- Date Author Uninvited
- Total Author Reminders

<u>Invitation submission-related information:</u>
- Author Initial Submission Date
- Submitted on time (yes/no)
- Manuscript Number
- Article Title
- Article Type
- Article Section /Category
- Date Assigned to First Editor
- First Editor Name
- Date Assigned to Current Handling Editor
- Handling Editor Name
- Editorial Status Date
- Editorial Status
- Most Recent Decision
- Most Recent Decision Date
- Final Disposition Term

- Target Publication Volume
- Target Publication Issue
- Target Publication Date
- Target Online Publication Date
- Online Publication Date (actual date)
- Publication Date (actual date)
- Number Of Pages
- Start Page
- End Page
- Volume Number (actual)
- Issue Number (actual)
- TOC Position
- DOI

Partial Display of Results page

Proposal Pipeline Report

This report was run Aug 31, 2007 3:22 PM

Contents:Proposal Handling Editor is equal to Ed Editor and Proposal Approved Date is greater than or equal to Apr 1, 2007 and Proposal Approved date is less than or equal to Aug 31, 2007.

Download the report results

Page: 1 of 1 (6 total results)   Display 10 ✓ results per page.

Proposal Manuscript Number ▲▼	Proposal Article Title ▲▼	Proposal Section/Category ▲▼	Date Proposal Assigned to Handling Editor ▲▼	Proposal Handling Editor ▲▼	Invited Author Name ▲▼	Date Author Invited ▲▼	Date Author Agreed ▲▼	Date Author Declined ▲▼	Date Author Uninvited ▲▼	Total Author Reminders ▲▼	Author Initial Submission Date ▲▼	Submitted on time ▲▼	Manuscript Number ▲▼	Article Title ▲▼	Article Type ▲▼
ACO1901 Details History	Anesthesia and You	Technology, education and training	Mar 25, 2007	Ed J Editor					June 5, 2007						
ACO1903a Details History	Anesthesia Outside the Operating Room	Thoracic Anaesthesia	Apr 1, 2007	Ed J Editor	James Michener	Apr 10, 2007	Apr 15, 2007			1	Apr 25, 2007		ACO20425	Anesthesiology from the Patient's Perspective	Review Article
ACO1903a Details History	Anesthesia Outside the Operating Room	Thoracic Anaesthesia	Apr 1, 2007	Ed J Editor	Hillel Tobias	Apr 10, 2007	Apr 12, 2007			2	Apr 21, 2007	Yes	ACO20417	Offsite Anesthesiology in the Cardiac Catheterization Lab	Review Article
ACO1903a Details History	Anesthesia Outside the Operating Room	Thoracic Anaesthesia	Apr 1, 2007	Ed J Editor	James Michener	Apr 10, 2007	Apr 15, 2007			1	Apr 25, 2007		ACO20425	Anesthesiology from the Patient's Perspective	Review Article
ACO1903a Details History	Anesthesia Outside the Operating Room	Thoracic Anaesthesia	Apr 1, 2007	Ed J Editor	Ellen Adamson	0Apr 12, 2007	4/20/2007			0	Apr 27, 2007		ACO20428	The newest trends in partial sedation	Review Article
ACO1905a Details History	Technology, Education and Training	Technology, education and training	Apr 5, 2007	Ed J. Editor	Duncan Webber	Apr 15, 2007	0Apr 21, 2007			1	May 25, 2007		ACO20542R2	Test Title	Review Article

Page: 1 of 1 (3 total results)   Display 10 ✓ results per page.

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AUTHOR INVITATION ENHANCEMENTS
Target Publication Date Changes

Currently, in version 6.1 of Editorial Manager, Editors must enter a Target Publication Date when soliciting a commentary on an existing submission or initiating a Proposal. When Authors are then invited to submit a manuscript, the Author's submission due date is calculated based on a specified number of days prior to the Target Publication Date. The due date information must be entered for every new Proposal or commentary; the default value is '0' and must be changed for due dates to be calculated.

New in release 7.0, the 'Target Publication Date' can be configured as either 'Required' or 'Optional' for each Article Type. This new setting allows a site administrator to configure the Target Publication Date to be an optional field on the *Target Publication Schedule* page and *Initiate Proposal* page, rather than required.

The site administrator may now configure default values on each Article Type for use in calculating a date for the 'Author Response Due' field (previously labeled 'Author Invitation Due') and the 'Author Submission Due' field. These values may be edited on a case by case basis (if the Editor has the 'Override Author Invited Submission Due Dates' RoleManager permission enabled) when soliciting a commentary or initiating a Proposal.

Two options are displayed on the *Add/Edit Article Type* page for calculating the 'Author Submission Due' date. The site administrator may now configure the Author Submission Due date of an invited submission to be based on the existing 'Number of Days Prior to Submission Target Publication Date' option, or a new 'Number of Days after Author has Accepted Invitation' option.

An Editor with the 'Override Author Invited Submission Due Dates' RoleManager permission enabled is able to manually change the number of days setting for either the 'Author Response Due' or 'Author Submission Due' information when the commentary is solicited or the Proposal is initiated, or later in the process (for each individual Author Invitation) from the *Details* page associated with the 'Parent' submission/Proposal. Due dates may also be further configured for each Author when the invitation letters are customized and confirmed.

Select Authors - Confirm Selection and Customize Letters

You have selected the following people as potential Authors. (...less) Click the **Customize** link if you want to customize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person's name. If you do no explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to an individual Author, 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 an Author in the list whom you do not wish to invite, check the 'Do Not Invite' box next to that Author's name. When you click the **Confirm Selections and Send Letters** button that Author will not be invited to submit.

Target Publication Information: *Date:* Unspecified *Volume:* Unspecified *Issue:* Unspecified

Authors to Invite

Name	Letter		Invited Author Response Due Date		Author Submission Due Date		Do Not Invite
Arthur Author, MD	Author Invitation - 1 ▾	Customize		(mm/dd/yyyy)		(mm/dd/yyyy)	☐
Artie Author, PhD, MD	Author Invitation - 1 ▾	Customize		(mm/dd/yyyy)		(mm/dd/yyyy)	☐

Cancel   Confirm Selections and Send Letters

Note: The logic used to calculate the Invited Author Response Due Date and Author Submission Due Date performs a check of the 'Calendar Days' and 'Working Days' settings on the *Configure General Due Date Preferences* page and calculates those dates based on the option selected.

TO CONFIGURE:
Go to PolicyManager, Edit Article Types, and click the Edit link next to the desired Article Type, or create a new Article Type. Under the 'Author Invitation Parameters' section, define whether the Target Publication Date is 'Required' or 'Optional', enter a value for the 'Number of Days Author has to Respond to Invitation', enter a value for the 'Author Submission Due', and then select how the Submission Due Date should be calculated: 'Number of Days Prior to Submission Target Publication Date', or 'Number of Days after Author has Accepted Invitation'.

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Edit Article Type

<div align="center">

Cancel   Submit

</div>

Article Type: Proposal
Maximum Article Type name is 40 characters.

Family: Proposal

☐ **Hide**   When you **Hide** an Article Type, the Article Type will be deactivated (not available for new or revised manuscripts).

☑ Allow file uploads from arXiv.org server

Author Parameters	First Revision	Subsequent Revisions	
Number of days Author has to Revise Submission:	0	0	*Set this value to zero if you do not want to use Revision Due Dates.*

Authors must suggest a minimum of 0 Reviewers when submitting their manuscripts.

Author Invitation Parameters:	Invited Submissions	*These settings affect any invitations generated from a submission with this article type; i.e. from a Proposal, or Solicited Commentary.*
Target Publication Date:	Required ▾	*Select 'Required' if you wish to enforce the entry of a Target Publication Date for Invited Commentaries or Proposals.*
Number of Days Author has to Respond to Invitation:	0	*A value of zero indicates the invitation due date is not calculated by the system, but may be entered manually by Editors with the proper permission.*
Author Submission Due (Select a Due Date Calculation Method):	0	*A value of zero indicates the submission due date is not calculated by the system, but may be entered manually by Editors with the proper permission.*

    ◉ Number of Days Prior to Submission Target Publication Date

    ○ Number of Days after Author has Accepted Invitation

Automatically Un-invite Authors:	☐	*If this box is selected, invited Authors will automatically be un-invited by the system if they do not respond to the invitation within the specified number of days.*
Automatically Promote Alternate Authors:	☐	*If this box is selected, Alternate invited Authors will automatically be promoted to invited Authors by the system when the primary invited Author(s) are un-invited or decline the invitation.*

In Editor RoleManager, select the Editor roles that should have 'Override Author Invited Submission Due Dates' permission and select the permission. Note: This permission is not new in 7.0, so Editor roles may already have this permission enabled.

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Alternate Authors

In EM version 6.1, Editors can initiate and/or be assigned to handle Proposals. Once a Proposal has been created, the next step is to invite Authors to respond to the Proposal (i.e. submit an invited article). Editors select 'Primary' Authors on the *Author Selection Summary* page, by clicking the Invite Authors link in the action column of various folders in the *Manage Proposals* Menu. Editors can also invite Authors to solicit commentaries on a particular article, by clicking the Solicit Commentary link in the action column of various folders. There are currently two options when searching for Authors to invite: Search by Authors and Search by Personal Classifications.

In version 7.0, Editors can build a list of **Alternate** Invited Authors (similar to Alternate Reviewers) that would take the place of 'Primary' Authors who decline the invitation, are un-invited, or if the invitations expire. Alternate Invited Authors can be promoted manually, or automatically by the system. Automatic promotion can be turned off for publications that want to manually promote Invited Authors.

Editors with 'Select Alternate Authors' RoleManager permission enabled will see two new search options on the *Author Selection Summary* page. They will also see the new 'Alternate Authors' section on the page. To search for Alternate Authors, the Editor would select 'Search for Alternate Authors' from the Search My Publication drop-down list and click the 'Go' button.

The Editor would then enter the desired criteria and click the 'Search' button (just like searching for 'Primary' Authors to invite).

Search for Alternate Authors - Manuscript STACEYTEST70-D-08-00009
"Testing 7.0-05"

Manuscript Details

Help with Searching   Insert Special Character

Criterion	Selector	Value	
Last Name	Begins With		END
Last Name			
First Name	Begins With		END
Position			
Department	Begins With		
Institution			
City			
State			
Country			

Clear   Search

Author Selection Summary
Editor Main Menu

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When the search results are returned, the Editor would select the Author(s) he wants to invite, enter the number of invitations to send to each Author, and click the 'Proceed' button.

Search for Alternate Authors - Manuscript STACEYTEST70-D-08-00009 "Testing 7.0-05"

Alternate Authors are back-up Authors, who are stored in a queue and are automatically promoted to Invited Author status as appropriate

Manuscript Details Register and Select as Alternate

Help with Searching   Insert Special Character

Criterion	Selector	Value	
Last Name	Begins With	brad	END
Last Name	Begins With		END
Last Name	Begins With		

Clear   Search

Target Publication Information: *Date:* 10/31/2010 *Volume:* Unspecified *Issue:* Unspecified

Alternate Author Candidates

Select the box for each person you want to select as an Alternate Author.

Page: 1 of 1 (4 total Authors)   Display 100 results per page.

Select	Number of Invitation Letters	Author Name	Board Member	Submissions in Progress		Author Statistics	Invitation Statistics
				Invited	Unsolicited		
☑	1	David S. Bradford, M.D.	No	0	5	Agreed Invitation in Progress: 0	Outstanding Invitations: 1
☐		Letitia Lynn Bradford, MD	No	0	4	Agreed Invitation in Progress: 0	Outstanding Invitations: 1
☑	1	Michael Patrick Bradley, MD, MS	No	0	0	Agreed Invitation in Progress: 0	Outstanding Invitations: 0
☐		William Bradley	No	0	0	Agreed Invitation in Progress: 0	Outstanding Invitations: 1

(* indicates match between Author and Manuscript Classifications)

Page: 1 of 1 (4 total Authors)   Display 100 results per page.

Cancel   Proceed

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The Editor can then customize each letter, select a new Author invitation letter (from the Author Invitation Letter Family), or decide not to use someone as an Alternate.

Note: No letters are sent until the Alternate Author is actually promoted to 'Primary' Invited Author.

Select Alternate Authors - Invitation Letter

You have selected the following people as Alternate Invited Authors. They will receive the letter shown when they are promoted from Alternate Invited Author.

To change the letter sent to an individual Alternate Author, click the Letter drop-down box next to that Author's name and select a different letter. The letter may be customized by clicking the Customize link. If the letter is customized, an asterisk (*) appears next to the Alternate Author's name. When you are satisfied with your choices, click 'Confirm Letter Choices and Proceed' to confirm your choice and return to the Author Selection Page. The letter will *not* be sent until the Alternate Author is promoted.

Authors to Invite

Name	Letter		Do Not Use
Michael Patrick Bradley, MD, MS	Author Invitation	Customize	☐
David S. Bradford, M.D.	Author Invitation	Customize	☐

Cancel   Confirm Letter Choices and Proceed

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When the Editor clicks the 'Confirm Letter Choices and Proceed' button, the Alternate Authors are added to the Alternate Author queue and are shown on the *Author Selection Summary* page.

**Author Selection Summary - Manuscript STACEYTEST70-D-08-00009
"Testing 7.0-05"**

Manuscript Details

Author Search

Search My Publication   [Search for Authors ▼]   [Go]

Selected Authors

Invited Authors

Michael Haake	Author Complete - 10-27-2008	View Letter	
Wolfgang Baer	Agreed to Submit - 10-27-2008	View Letter	Un-invite
Kent N. Bachus, Ph.D.	Author Invited - 10-27-2008	View Letter	Un-invite
Steven L Haddad, MD	Author Invited - 10-27-2008	View Letter	Un-invite
Antoine Hamel, MD	Author Declined - 10-27-2008	View Letter	
Michael Haake, M.D.	Author Un-invited - 10-27-2008	View Letter	

Alternate Authors

| ⬇ Michael Patrick Bradley, MD, MS | | Promote | Remove |
| ⬆ David S. Bradford, M.D. | | Promote | Remove |

Alternate Authors will be promoted if: (1) an Invited Author declines the invitation, (2) an Author is un-invited by an Editor or (3) an Author does not respond to the invitation within the number of days specified.

Alternate Author Invitation Letters

Register and Invite New Author

Return to Pending Proposals

Return to Manage Proposals Menu
Return to Main Menu

NOTE: If the user does not have 'Promote Alternate Authors' or 'Select Alternate Authors' permission, the Alternate Authors section of the page is displayed, but the up/down sort arrows and the 'Promote' and/or 'Remove' links are suppressed.

Clicking the Alternate Author Invitation Letters link takes the user to the *Select Alternate Authors – Invitation Letter* page, where he can change the letter selection and/or customize the letter that will be sent to the Author if he is promoted.

Select Alternate Authors - Invitation Letter

You have selected the following people as Alternate Invited Authors. They will receive the letter shown when they are promoted from Alternate Invited Author.

To change the letter sent to an individual Alternate Author, click the Letter drop-down box next to that Author's name and select a different letter. The letter may be customized by clicking the Customize link. If the letter is customized, an asterisk (*) appears next to the Alternate Author's name. When you are satisfied with your choices, click 'Confirm Letter Choices and Proceed' to confirm your choice and return to the Author Selection Page. The letter will *not* be sent until the Alternate Author is promoted.

Authors to Invite

Name	Letter	
Michael Patrick Bradley, MD, MS	Author Invitation	Customize
David S. Bradford, M.D.	Author Invitation	Customize

Cancel   Confirm Letter Choices and Proceed

Users can also Search for Alternate Authors by Personal Classifications.

Author Selection Summary - Manuscript STACEYTEST70-D-08-00009 "Testing 7.0-05"

Manuscript Details

Author Search

Search My Publication   Search for Alternate Authors by Personal Classifications   Go

Selected Authors

Invited Authors

Michael Haake	Author Complete - 10-27-2008	View Letter	
Wolfgang Baer	Agreed to Submit - 10-27-2008	View Letter	Un-invite
Kent N. Bachus, Ph.D.	Author Invited - 10-27-2008	View Letter	Un-invite
Steven L Haddad, MD	Author Invited - 10-27-2008	View Letter	Un-invite
Antoine Hamel, MD	Author Declined - 10-27-2008	View Letter	
Michael Haake, M.D.	Author Un-invited - 10-27-2008	View Letter	

Alternate Authors

There are currently no Alternate Authors selected for this submission

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The Editor would then select the desired Personal Classification(s) and click the 'Search for Authors' button (just like searching for 'Primary' Authors by Personal Classifications).

Search for Alternate Authors by Personal Classifications

On the left, below, is the complete list of Classification Terms currently assigned to people in this publication. Classification terms that are not assigned will not appear in the list. To search for potential Author candidates associated with particular Classifications, transfer classifications to the 'Selected Classifications' list by checking them and using the 'Select->' button, then click 'Search for Authors' to execute the search. A maximum of 5 Classifications may be selected in any given search.

Cancel   Search For Authors

Search: [   ]   Search   Clear
[Matching terms display in red text]

Selected Classifications: Limit 5 Classifications

□-1: [...]
    □ .10000: ADULT
    □ .11000: Adult Disease
    □ .12000: Adult Trauma
    □ .20000: PEDIATRIC
    □ .21000: Pediatric Disease
    □ .22000: Pediatric Trauma
    □ .30000: BASIC SCIENCE
    □ .50000: RECONSTRUCTION
□-20: [...]
□-30: [...]
□-40: [...]
□-50: [...]
□-60: [...]
□-70: [...]
□-80: [...]
□-90: [...]

Select->
<-Remove

□ 1.20000: PEDIATRIC
□ 1.22000: Pediatric Trauma

Cancel   Search For Authors

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The *Search for Alternate Authors Results* page shows the same information as described above, plus the Personal Classifications information.

When the 'Proceed' button is clicked, the Editor is taken through the letter selection/customization page as described above.

If the Editor clicks the <u>Un-invite Author</u> link on the *Author Selection Summary* page and the 'Automatically Promote Alternate Authors' option is enabled for the submission's article type on the *Add/Edit Article Type* page, new (red) text is displayed on the target page. If the user clicks the 'Un-invite and Send Letter' button and there is an Alternate Author in the queue, he will automatically be promoted to Invited Author. Any letters associated with the 'Promote Alternate Authors' ActionManager event are sent.

Un-invite Author

You are about to Un-invite David J. Clare, MD. This action will terminate this person's invitation to submit a manuscript related to Manuscript Number BETSYTEST70-D-08-00021 "Proposal for Special Article". If there is an Alternate Author in the queue, he/she will be promoted in this Author's place and will be sent the selected Alternate Author Invitation letter.

You are not required to send notification letters to Authors if they are un-invited to submit. (less...).

However, if you do not send a letter, the invitation will no longer appear in the Author's folders with no explanation. Therefore, it is recommended that you send an Un-invite Letter, explaining to the person why his/her services are no longer required for this invitation.

To change the letter sent to an individual person, click the Letter drop-down box next to that person's name and select a different letter.

Click **Customize** if you want to customize 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.

Note: If you customize a letter and then select a new letter, your customized text will be lost.

Name	Letter		Do Not Send Letter
David J. Clare, MD (Author)	Un-Invite Author	Customize	☐

Cancel   Un-invite and Send Letter

If the Editor clicks the <u>Un-invite Author</u> link on the *Author Selection Summary* page and the 'Automatically Promote Alternate Authors' option is NOT enabled, the following (red) text is displayed on the target page.

Un-invite Author

You are about to Un-invite Kent N. Bachus, Ph.D.. This action will terminate this person's invitation to submit a manuscript related to Manuscript Number STACEYTEST70-D-08-00009 "Testing 7.0-05". Alternate Authors may be promoted manually, if desired

You are not required to send notification letters to Authors if they are un-invited to submit. (less...).

However, if you do not send a letter, the invitation will no longer appear in the Author's folders with no explanation. Therefore, it is recommended that you send an Un-invite Letter, explaining to the person why his/her services are no longer required for this invitation.

To change the letter sent to an individual person, click the Letter drop-down box next to that person's name and select a different letter.

Click **Customize** if you want to customize 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.

Note: If you customize a letter and then select a new letter, your customized text will be lost.

Name	Letter		Do Not Send Letter
Kent N. Bachus, Ph.D. (Author)	Author Invitation	Customize	☐

[Cancel]   [Un-invite and Send Letter]

NOTE: If the option 'Automatically Promote Alternate Authors' is enabled on the *Edit Article Type* page for the submission's article type, Alternate Authors will also be automatically promoted by the system when an invited Author declines the invitation or the invitation expires. An invitation 'expires' and the Author is automatically un-invited when the Invited Author Response Due Date has passed (and the 'Automatically Un-invite Authors' option is selected on the *Edit Article Type* page). The automatic un-invitation and promotion process occurs in a nightly batch process.

Editors with RoleManager permission to 'Promote Alternate Authors' can manually promote an Alternate Author by clicking the Promote link on the *Author Selection Summary* page.

Author Selection Summary - Manuscript STACEYTEST70-D-08-00009 "Testing 7.0-05"

Manuscript Details

Author Search

Search My Publication   Search for Authors   [Go]

Selected Authors

Invited Authors

Michael Haake	Author Complete - 10-27-2008	View Letter	
Wolfgang Baer	Agreed to Submit - 10-27-2008	View Letter	Un-invite
Kent N. Bachus, Ph.D.	Author Invited - 10-27-2008	View Letter	Un-invite
Steven L Haddad, MD	Author Invited - 10-27-2008	View Letter	Un-invite
Antoine Hamel, MD	Author Declined - 10-27-2008	View Letter	
Michael Haake, M.D.	Author Un-invited - 10-27-2008	View Letter	

Alternate Authors

⬇ Michael Patrick Bradley, MD, MS		Promote	Remove
⬆ David S. Bradford, M.D.		Promote	Remove

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Alternate Authors will be promoted if: (1) an Invited Author declines the invitation, (2) an Author is un-invited by an Editor or (3) an Author does not respond to the invitation within the number of days specified.

Alternate Author Invitation Letters

Register and Invite New Author
Return to Pending Proposals
Return to Manage Proposals Menu
Return to Main Menu

When an Editor clicks the <u>Promote</u> link, he can select a new letter or customize the existing letter, and modify the due dates (appropriate RoleManager permission is required to change the due dates).

Promote Author

You are about to Promote Georg Gradl from Alternate Author to Author.

If you wish to promote this person, click 'Promote and Send Letter'.

Click **Customize** if you want to customize 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.

Note: If you customize a letter and then select a new letter, your customized text will be lost.

Click 'Cancel' if you do not want to promote the Alternate Author.

Name	Letter		Invited Author Response Due Date	Author Submission Due Date
Georg Gradl (Author)	Author Invitation	Customize	11/14/2008 (mm/dd/yyyy)	(mm/dd/yyyy)

Cancel   Promote and Send Letter

A confirmation page is displayed when the 'Promote and Send Letter' button is clicked.

Promote Invited Author Confirmation

An e-mail has been sent to Michael Patrick Bradley, MD, MS regarding the Promotion

Close

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Editors with RoleManager permission to 'Remove Alternate Authors' can remove an Alternate Author from the list by clicking the Remove link on the *Author Selection Summary* page.

When an Editor clicks the Remove link, he is asked to confirm the action before the person is removed from the Alternate Author queue.
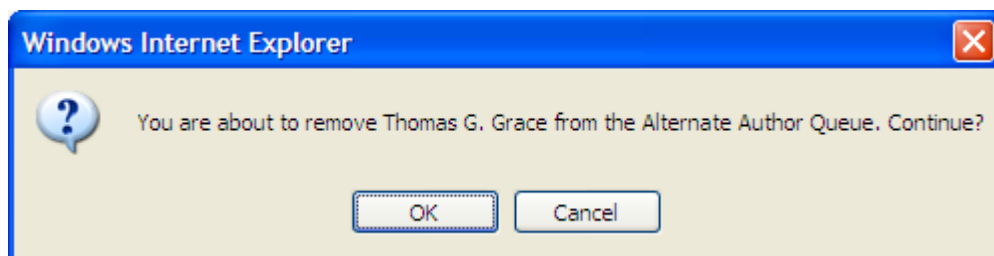
Alternate Authors are displayed on the *Editorial Details* and *Proposal Details* pages.

Details for Manuscript Number: STACEYTEST70-D-08-00009
"Testing 7.0-05"

Cancel   Save and Close

Manuscript Notes   Editors   Author(s) Invited to Respond to Proposal

Editor Originating Proposal:	Gene Hackman, M.D., Editor-in-Chief [Proxy]
Originating Editor E-Mail:	slavelle@edmgr.com
Originating Editor Comments:	
Article Type:	Proposal
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Initial Date of Proposal:	Oct 14 2008 12:45:11
Editorial Status Date:	Oct 14, 2008
Current Editorial Status:	Received by Editor
Submission Target Publication Date	10/31/2010 (mm/dd/yyyy)
Submission Target Volume:	
Submission Target Issue:	
Final Disposition Term:	None
Blinded Editors:	Blinded Editors
Select Submissions Flags:	Add/Edit Submission Flags
Corresponding Editor:	**There is no Corresponding Editor for this manuscript**

Manuscript Notes: Top

☐ Display Manuscript Notes Flag

Insert Special Character

Editors   Top

Name:	Gene Hackman, M.D. [Proxy]
Role:	Editor-in-Chief
Date Assigned:	Oct 14, 2008
Date Completed:	
Elapsed Days:	9
Recommendation:	

Author(s) Invited to Respond to Proposal   Top

Name:	Michael Haake [Proxy]
Author Status:	Author Complete
Date Author Invited:	Oct 14, 2008
Elapsed Days Since Invitation:	8
Date Submission Due:	(mm/dd/yyyy)

Name:	Wolfgang Baer [Proxy]
Author Status:	Agreed to Submit
Date Author Invited:	Oct 27, 2008
Date Author Agreed:	Oct 27, 2008
Elapsed Days Since Invitation:	0
Date Submission Due:	(mm/dd/yyyy)

Alternate Authors:	Michael Patrick Bradley David S. Bradford

Cancel   Save and Close

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TO CONFIGURE:
Go to Editor RoleManager to enable the new Alternate Author permissions.

NOTE: The new permissions are 'sub-permissions' of the existing 'Invite Authors/Solicit Commentaries' permission. The new sub-permissions are disabled (grayed out) if 'Invite Authors/Solicit Commentaries' is not enabled.

Edit Role Definition

Role Name: Editor-in-Chief
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

Expand All   Collapse All

⊞ **New Submissions**
⊞ **Editor Assignment**
⊞ **Reviewer Invitations**
⊞ **Editor Decisions**
⊟ **Proposals/Commentaries**
    Use Proposals Details
    Layout   Default Proposals
    ☑ Search All Proposals
    ☑ Initiate Proposals
    ☑ Invite Authors/Solicit Commentaries
        ☐ Select Alternate Authors
        ☐ Promote Alternate Authors
        ☐ Remove Alternate Authors
    ☑ Override Author Invited Submission Due Dates

If you want to enable automatic un-invitation of Authors and/or automatic promotion of Alternate Authors, go to the *Edit Article Type* page.

Edit Article Type

Cancel   Submit

Article Type: Proposal

Maximum Article Type name is 40 characters.

Family: Proposal

☐ **Hide**   When you **Hide** an Article Type, the Article Type will be deactivated (not available for new or revised manuscripts).

☑ Allow file uploads from arXiv.org server

	First Revision	**Subsequent Revisions**	
Author Parameters			
Number of days Author has to Revise Submission:	0	0	*Set this value to zero if you do not want to use Revision Due Dates.*

Authors must suggest a minimum of 0 Reviewers when submitting their manuscripts.

Author Invitation Parameters: **Invited Submissions**

These settings affect any invitations generated from a submission with this article type; i.e. from a Proposal, or Solicited Commentary.

Target Publication Date: Required ▼

Select 'Required' if you wish to enforce the entry of a Target Publication Date for Invited Commentaries or Proposals.

Number of Days Author has to Respond to Invitation: 0

A value of zero indicates the invitation due date is not calculated by the system, but may be entered manually by Editors with the proper permission.

Author Submission Due
(Select a Due Date Calculation Method):   0

A value of zero indicates the submission due date is not calculated by the system, but may be entered manually by Editors with the proper permission.

⦿ Number of Days Prior to Submission Target Publication Date

○ Number of Days after Author has Accepted Invitation

Automatically Un-invite Authors: ☐

If this box is selected, invited Authors will automatically be un-invited by the system if they do not respond to the invitation within the specified number of days.

Automatically Promote Alternate Authors: ☐

If this box is selected, Alternate invited Authors will automatically be promoted to invited Authors by the system when the primary invited Author(s) are un-invited or decline the invitation.

In ActionManager, the new 'Promote Alternate Authors' event allows a letter to be sent to the Author when an Alternate Author is promoted, either manually by the Editor on the *Author Selection Summary* page, or automatically by the system (if the 'Automatically Promote Alternate Authors' checkbox is selected on the *Edit Article Type* page).

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The 'Promote Alternate Authors' event does not have a Document Status change associated with it (the status is hard coded to 'No Change').

On the ActionManager letter selection page, the letter choices in the drop-down are limited to letters in the Author Invitation Letter Family.

When a publication upgrades to version 7.0, Alternate Authors are automatically added to the **default** Editorial and Proposal Details layouts. If your publication is using a Custom Details Layout and you want to add Alternate Authors to the display, you must select 'Alternate Authors' on the *Select Items to Display* page and verify the desired order on the *Add/Edit Details Page Layout* page in PolicyManager. If there are no Alternate Authors, the whole section is suppressed.

Select Items to Display (partial page layout)

⊞ **General Manuscript Information**
⊞ **Proposal Specific Information**
⊞ **Additional Manuscript Details**
⊞ **Key Workflow Dates and Status Information**
⊟ **Assignments and Invitations**
　　☑ Editors
　　☐ Reviewers
　　☐ Alternate Reviewers
　　☐ Reviewers Proposed by Editors
　　☑ Invited Authors
　　☑ Alternate Authors
　　☐ Production Tasks
⊞ **Publishing and Production Information**

Expand All　　Collapse All

[Cancel]　[Submit]

Add/Edit Details Page Layout

11	Submission Target Volume	☐
12	Submission Target Issue	☐
13	Final Disposition Term	☐
14	Blinded Editors	☐
15	Submission Flags	☐
16	Select Submissions Flags	☐
17	Corresponding Editor	☐
18	Abstract	☑
19	Manuscript Notes	☑
20	Editors *[Section Heading]*	☑
21	Editors	☐
22	Additional Information	☐
23	Author(s) Invited to Respond to Proposal *[Section Heading]*	☑
24	Invited Authors	☐
25	Alternate Authors	☐

[Update Order]

[Cancel]　[Submit]

Automated Author Un-invite

In EM version 6.1, the only way to un-invite an invited Author is to manually click the Un-invite action link next to the Author's name on the *Author Selection Summary* page.

New in version 7.0, invited Authors can be automatically un-invited by the system if the Author does not accept or decline the invitation to submit by the Invited Author Response Date. This date is derived from the 'Number of Days Author Has to Respond to Invitation' setting on the *Edit Article Type* page in PolicyManager, and the publication's setting for calculation of due dates (working days or calendar days) is taken into account. Editors with appropriate RoleManager permission can modify the 'Number of Days Author Has to Respond to Invitation' date during the Author invitation process.

The automatic un-invitation process occurs nightly in a batch process transparent to users. When this occurs, the 'Un-invite Authors' ActionManager event is triggered and the letter associated with the 'Un-invite Authors' event will be sent to the Author being un-invited. If no letter is configured, no letter will be sent, but the Author will still be un-invited.

If the publication also has the 'Automatically Promote Alternate Authors' option selected for the selected Article Type, the batch process will automatically un-invite the Author(s) and promote any available Alternates in his place.

NOTE: If the 'Invited Author Response Due Date' for a particular submission is blank (null), the Author cannot be automatically un-invited by the system, even if the 'Automatically Un-invite Authors' option is enabled.

TO CONFIGURE:
To enable automatic un-invitation of invited Authors, go to the *Edit Article Type* page in PolicyManager and select the 'Automatically Un-invite Authors' option. In the example below, Authors who have not responded to the invitation within 14 days will be automatically un-invited by the system.

Edit Article Type

Cancel   Submit

Article Type: Research

Maximum Article Type name is 40 characters.

Family: Regular

☐ **Hide**   When you **Hide** an Article Type, the Article Type will be deactivated (not available for new or revised manuscripts).

☐ Allow file uploads from arXiv.org server

Author Parameters	First Revision	Subsequent Revisions	
Number of days Author has to Revise Submission:	20	10	*Set this value to zero if you do not want to use Revision Due Dates.*

Authors must suggest a minimum of [0] Reviewers when submitting their manuscripts.

Author Invitation Parameters:	**Invited Submissions**	*These settings affect any invitations generated from a submission with this article type; i.e from a Proposal or Solicited Commentary.*
Target Publication Date:	Required ▾	*Select "Required" if you wish to enforce the entry of a Target Publication Dat for Invited Commentaries or Proposals.*
Number of Days Author has to Respond to Invitation:	14	*A value of zero indicates the Invitation due date is not calculated by the system, but may be entered manually by Editors with proper permissions.*
Author Submission Due: (Select a Due Date Calculation Method):	21	*A value of zero indicates the Invitation due date is not calculated by the system, but may be entered manually by Editors with proper permissions.*

○ Number of days prior to Target Publication Date:

◉ Number of days after Author has accepted invitation:

Automatically Un-Invite Authors:	☑	*If this box is selected, invited Authors will automatically be un-invited by the system if they do not respond to the invitation within the specified number of days.*
Automatically Promote Alternate Authors:	☑	*If this box is selected, Alternate invited Authors will automatically be promoted to invited Authors by the system when the primary invited Authors(s) are un-invited or decline the invitation*

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More Detailed Statistics on Author Search Results

The *Author Search Results* pages are displayed when the Editor executes a search from the *Author Selection Summary* page (Search for Authors, Search for Alternate Authors, Search by Personal Classifications and Search for Alternate Authors by Personal Classifications). New statistics have been added to the *Results* pages to assist with the invitation process.

1. Submissions in Progress – This refers to all pending submissions that have been submitted to the publication and the final decision has not yet been made. Submissions in Progress are broken down into 2 separate calculations: 'Invited' (originated from a Proposal or solicited commentary) and 'Unsolicited' (regular submission).
2. Author Statistics – This new column shows 'Agreed Invitations in Progress' (Author has agreed to submit but has not yet submitted the article).
3. Invitation Statistics - This new column shows 'Outstanding Invitations' (Author has been invited to submit but has not yet agreed to submit or declined the invitation).

Search for Authors - Manuscript STACEYTEST70-D-08-00009
"Testing 7.0-05"

Manuscript Details   Register and Invite New Author

	Help with Searching		Insert Special Character		
Criterion	**Selector**		**Value**		
Last Name ∨	Begins With ∨	brad		END ∨	
Last Name ∨	Begins With ∨			END ∨	
Last Name ∨	Begins With ∨				

Clear   Search

Target Publication Information: *Date:* 10/31/2010 *Volume:* Unspecified *Issue:* Unspecified

Author Candidates

Check the box for each person you want to invite to submit, and then proceed.

Page: 1 of 1 (4 total Authors)   Display 100 ∨ results per page.

Select	Number of Invitation Letters	Author Name	Board Member	Submissions in Progress		Author Statistics	Invitation Statistics
				Invited	**Unsolicited**		
☐		David S. Bradford, M.D.	No	0	5	**Agreed Invitation in Progress:** 0	**Outstanding Invitations:** 1
☐		Letitia Lynn Bradford, MD	No	0	4	**Agreed Invitation in Progress:** 0	**Outstanding Invitations:** 1
☐		Michael Patrick Bradley, MD, MS	No	0	0	**Agreed Invitation in Progress:** 0	**Outstanding Invitations:** 0
☐		William Bradley	No	0	0	**Agreed Invitation in Progress:** 0	**Outstanding Invitations:** 1

(* indicates match between Author and Manuscript Classifications)

Page: 1 of 1 (4 total Authors)   Display 100 ∨ results per page.

Cancel   Proceed

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Register and Invite New Author/Select as Alternate

Similar to the Register and Invite Reviewer feature, the new <u>Register and Invite New Author</u> and <u>Register and Select as Alternate</u> links facilitate the quick registration of a person who cannot be found in the people database when searching for Authors to invite or select as Alternates, without the user having to exit the Author invitation interface. The Editor can proxy register the person using minimal contact information, and immediately send that person an invitation e-mail, or select them as an Alternate Author.

Editors with permission to 'Proxy Register New Users' in RoleManager will see the <u>Register and Invite New Author</u> link on the *Author Selection Summary*, *Search for Authors Results* and *Search for Authors by Personal Classifications Results* pages.

Author Selection Summary - Manuscript STACEYTEST70-D-08-00009 "Testing 7.0-05"

Manuscript Details

Author Search

Search My Publication | Search for Authors [▼] | Go

Selected Authors

Invited Authors

Michael Haake	Author Complete - 10-27-2008	View Letter	
Wolfgang Baer	Agreed to Submit - 10-27-2008	View Letter	Un-invite
Kent N. Bachus, Ph.D.	Author Invited - 10-27-2008	View Letter	Un-invite
Steven L Haddad, MD	Author Invited - 10-27-2008	View Letter	Un-invite
Antoine Hamel, MD	Author Declined - 10-27-2008	View Letter	
Michael Haake, M.D.	Author Un-invited - 10-27-2008	View Letter	

Alternate Authors

There are currently no Alternate Authors selected for this submission

Register and Invite New Author

Return to Pending Proposals

Return to Manage Proposals Menu
Return to Main Menu

When the user clicks the Register and Invite New Author link, he will proceed to the Proxy Registration interface.

When the proxy registration is complete, the user can navigate directly back to the Author search interface and continue with the invitation process.

A similar link - <u>Register and Select as Alternate</u> – is displayed on the *Search for Alternate Authors Results* and *Search for Alternate Authors by Personal Classifications Results* pages (partial page shown below). Clicking the link takes the user to the same proxy registration process described above. When the registration is complete, the user can navigate directly back to the Alternate Author search interface.

TO CONFIGURE:
The Editor must have RoleManager permission to 'Proxy Register New Users' to see the
<u>Register and Invite New Author link.</u>

Edit Role Definition

Role Name: Editor-in-Chief

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

Expand All   Collapse All

⊞ **New Submissions**
⊞ **Editor Assignment**
⊞ **Reviewer Invitations**
⊞ **Editor Decisions**
⊞ **Proposals/Commentaries**
⊞ **General Searching and Viewing**
⊞ **Edit Submission**
⊞ **Transmittal Form**
⊞ **Sending E-mail**
⊞ **Viewing and Editing People Data**
⊞ **Flag Icons**
⊟ **Proxy Activities**
☑ Proxy Power:
☑ Proxy For Authors
☑ Proxy For Reviewers
☑ Proxy For Editors
☑ Proxy For Publishers
☑ Proxy Register New Users

⊞ **Administrative and Reporting Functions**
⊞ **Preprint Manager**

Cancel   Submit

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PRODUCTION TRACKING ENHANCEMENTS
Production Tasks for Schedule Groups

In EM/PM version 6.1, Production Tasks could be used to assign individual submissions to someone to be completed. New functionality in version 7.0 allows you to use production tasks to assign schedule groups in the same way.

Also in 7.0, companion files can now be uploaded and linked to Schedule Groups. When you assign a Schedule Group Production Task you can select companion files from the Schedule Group File Inventory or from the File Inventories of individual submissions assigned to the Schedule Group.

Once configured, Editors and Publishers will see new links for Schedule Group Task Assignments in their Production Menu, for <u>Schedule Group Tasks Assigned to Me</u> and <u>Schedule Group Tasks I have Assigned</u>.

A new <u>Schedule Group Tasks Reminder Report</u> link appears for users with 'Send Production Reminders' permission enabled.

Note: Some existing (v6.1) links and pages have been renamed in 7.0 to distinguish Submission Production Task-related pages from Schedule Group Task-related pages:

- 'Production Tasks Assigned to Me' is renamed 'Submission Tasks Assigned to Me'
- 'Production Tasks I Have Assigned' is renamed 'Submission Tasks I Have Assigned'
- 'Production Tasks Reminder Report' is renamed 'Submission Tasks Reminder Report'

The new <u>Schedule Group Tasks Assigned to Me</u> folder is similar to the existing Submission-based 'Tasks Assigned to Me' folder (which has been renamed to 'Submission Tasks Assigned to Me'), but lists tasks related to Schedule Groups.

The <u>Schedule Group Tasks I have Assigned</u> is similar to the existing Submission-based 'Tasks I Have Assigned' folder (also renamed), but listing tasks related to Schedule Groups.

TO CONFIGURE:

Under RoleManager, edit the appropriate Editor and Publisher roles (permissions located under the 'Preprint Manager' section for both Editors and Publishers).

- Enable the new 'Assign Schedule Group Production Task' permission to allow the role to be selected to assign Schedule Group Production Tasks.

- Enable the existing 'Receive Production Task' permission to allow this role to be selected as recipients for Schedule Group Production tasks (this setting applies to both Submission and Schedule Group Production Tasks).

- Enable the new 'Override Schedule Group Production Task Due Date' permission to allow the user to modify due dates for Schedule Group Tasks.

- Enable the existing 'Cancel Production Task' setting to allow users with this role to cancel Schedule Group Production Tasks that they have assigned (this setting applies to both Submission and Schedule Group Production Tasks).

Layout, Editor RoleManager (Publisher layout not shown):

Schedule Group Tasks Reminder Report

The Schedule Group Tasks Reminder Report link allows user to generate lists of open or overdue tasks, and to generate reminder letters from the resulting list. The initial report setup page uses the same characteristics as the existing submission-based Tasks Reminder Report, but only Schedule Group-related Production Tasks are included in the results.

The results list contains only Schedule Group-related production tasks; per the existing submission-related report, individual assignments can be selected in order to generate reminders.

Schedule Group Tasks Reminder Report

Content: Check the box under the 'Send Reminder' column to send a reminder letter to that person.

You will have the opportunity to customize the individual reminder letters after clicking the 'Send Reminders' button.

Page: 1 of 1 (2 total submissions)   Display 100 ▼ results per page.

Check All   Clear All

Send Reminder	Production Task ▲▼	Assigned To ▲▼	Date Task Assigned ▲▼	Date Task Due ▲▼	Days Until Due ▲▼	Date Last Reminder Sent ▲▼	# Reminders Sent ▲▼	Total Elapsed Days ▲▼	Schedule Group ▲▼	Schedule Group Target Online Pub Date ▲▼	Schedule Group Target Pub Date ▲▼	Schedule Group Target Volume ▲▼	Schedule Group Target Issue ▲▼
☐	Issue Makeup History	Aldens Typesetting	Oct 23, 2007	Oct 28, 2007	101 days past due	Nov 21, 2007	1	106	10(2) 2008 April Issue	Mar 01, 2008	Mar 31, 2008	10	2
☐	Prep for Web History	JP Printer	Oct 23, 2007	Oct 28, 2007	101 days past due		0	106	10(1) 2008 January Issue	Dec 01, 2007	Dec 22, 2007	10	1

Check All   Clear All

Page: 1 of 1 (2 total submissions)   Display 100 ▼ results per page.

Send Reminders

Back to Schedule Group Tasks Reminder Report
Return to [Referring Page]
Editorial Menu

After clicking Send Reminders, the process of selecting and editing reminder letters is identical to the Submission-based reminder, and uses the same Production Reminder letter family.

TO CONFIGURE:
If necessary, use PolicyManager>Edit Letters to first add a new reminder letter to the Production Reminder family:

Add Letter

Please enter a Letter Purpose and Subject, and select a Letter Family for your new letter. Letter Families are used so that the correct type of letter is available for certain functions (such as Reviewer Reminders and Editor Decisions). After you select a Letter Family, the page will refresh and allow you to enter additional information about this letter, including the Letter Body.

Letter Purpose: Production Chase - Paginate Issue

Subject: Request from journal JXYZ

Letter Family: Production Reminder ▼

Please select a Letter Family
Ad Hoc From Author
Ad Hoc From Reviewer
Ad Hoc From Editor
Ad Hoc From Publisher
Ad Hoc for Proposal
Decision
Communications to Author
Author Reminder
Author Invitation
Editor Reminder
Production Reminder
Reviewer Reminder
Reviewer Invitation
Reviewer Notification

Continue

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Use RoleManager > Editor or RoleManager > Publisher to enable the existing 'Send Production Reminders' permission (located in the 'Preprint Manager' section for both) to Editors or Publishers who need to run these reminders:

Layout, Editor RoleManager (Publisher not shown):
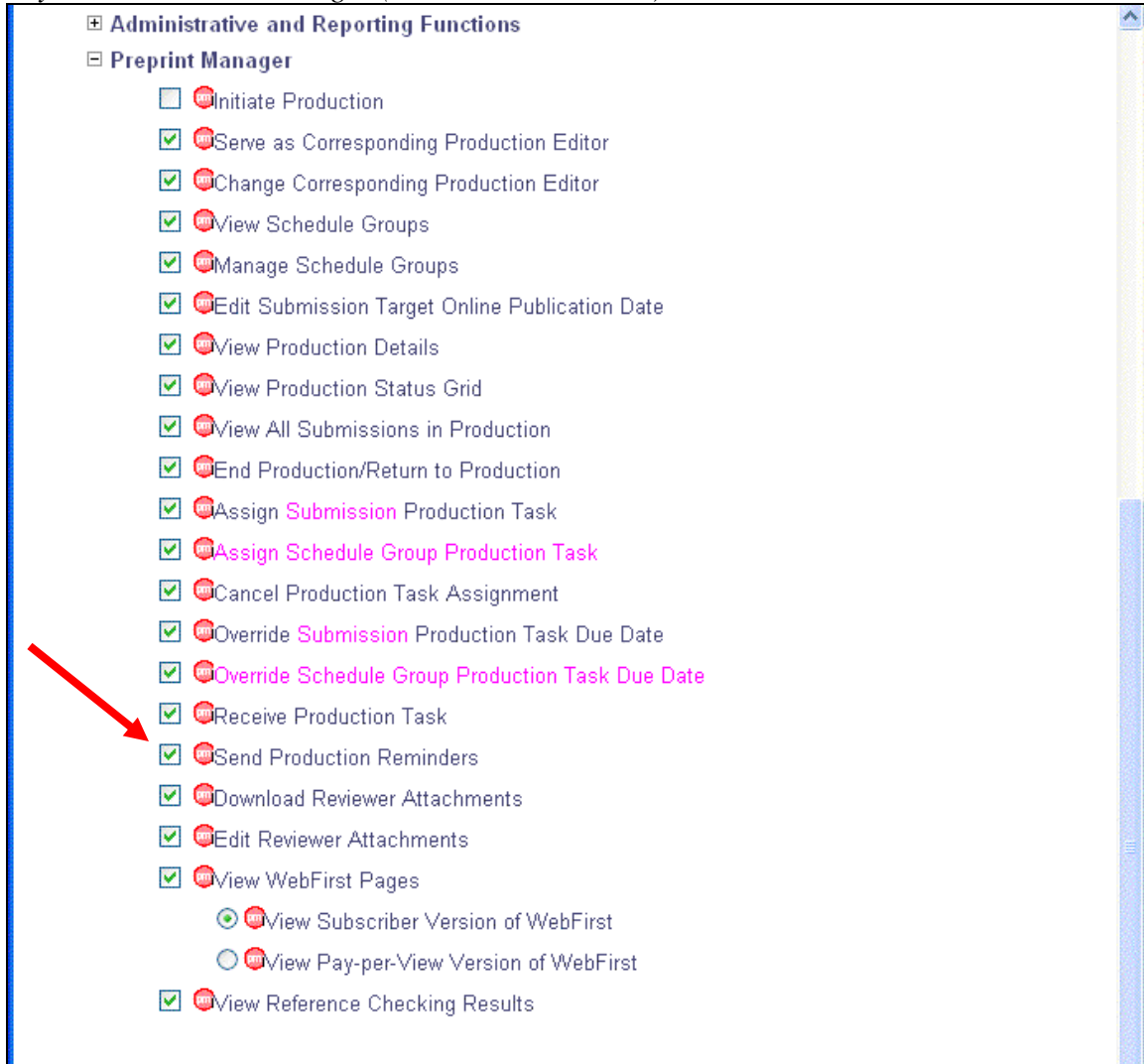
Manage Schedule Groups Enhancements

The Manage Schedule Groups folder has been enhanced to allow users to assign Production Tasks for Schedule groups, work with companion files associated with Schedule Groups, and to review any correspondence and Production Task history for each Schedule Group.

The History Action Link displays the new Schedule Group History page, containing a Schedule Group Task History listing all previous task assignments, and a Schedule Group Correspondence History, listing correspondence linked to the schedule group. Only Schedule Group Production Task-related correspondence is displayed. Both function in the same way as their equivalents in the current Submission History page.

Note that in this release, User-Defined Production Statuses do not apply to Schedule Groups, so do not appear in the History page.

The File Inventory Action Link displays the new Schedule Group File Inventory page.
Similar to the Submission File Inventory page, this allows users to attach files to the
Schedule Group itself; the upload, download, hide, replace and .ZIP file functionality is
the same.

These files are available when assigning Schedule Group Production Tasks; however, you may also need to include files from submissions within the Schedule Group as well. You can do this by clicking the Select Companion Files from Submissions button, displaying a new *Select Associated Companion Files* page.

Select Associated Companion Files

Listed below are all non-Hidden Companion files associated with submissions currently assigned to this Schedule Group. Selecting a file will make it available to the Schedule Group, but note it will also remain linked to the original submission and will appear under the submission's File Inventory as well.

Cancel   Submit

Check All   Clear All

Associated Companion Files

Select File	Sub. TOC Position	Submission	Color Code	Item	Description	Item Family	File Name	Size	Last Modified	Uploaded By	QC Results
☐	1	10.300/JXYZ-D-04-00071.1 JXYZ-D-04-00071 John Smith (France) Use of aspirin to treat hypertension	■	Copyedited Text (P)	Text CEd by JC; minor cleanup, no queries	Document	SmithJ_AntiMatterdevices_page_proofs_version2.doc	162 Bytes	Mar 14, 2007	John MacJohn, Editorial Office	Error
☐	1	10.300/JXYZ-D-04-00071.1 JXYZ-D-04-00071 John Smith (France) Use of aspirin to treat hypertension		Figure (P)	Author Pic	Figure	ProfJohnSmityCERN.jpg	12.3 Mb	Feb 1, 2007	John MacJohn, Editorial Office	Error
☐	1	10.300/JXYZ-D-04-00071.1 JXYZ-D-04-00071 John Smith (France) Use of aspirin to treat hypertension		Corrected Figure (P)	Fig 1	Figure	SmithJ_AntiMatterdevices_Fig1.TIF	103.Mb	Mar 1, 2007	Andy Jones, Art Team	Error
☐	1	10.300/JXYZ-D-04-00071.1 JXYZ-D-04-00071 John Smith (France) Use of aspirin to treat hypertension		Corrected Figure (P)	Fig 2	Figure	SmithJ_AntiMatterdevices_Fig2.TIF	24.2 Mb	Mar 1, 2007	Andy Jones, Art Team	Error
☐	2	10.300/JXYZ-D-06-00082.1 JXYZ-D-04-00082 Alan Quartermaine (United Kingdom) Anterior uveitis following combined vaccination for measles, mumps and rubella (MMR): a report of two cases		Corrected Text (P)	RFP	Document	Qmaine_1994_AssessingQBitEfficiency.rtf	1.2 Mb	Apr 16, 2008	A. Aldens, Typesetter	Error
☐	4	10.300/JXYZ-D-07-00001.1 JXYZ-D-07-00001 Johan Schmidt (Austria) Cartilage-Derived Retinoic Acid-Sensitive Protein and Type II Collagen Expression During Fracture Healing Are Potential Targets for Sox9 Regulation		Copyedited Text (P)	Appendix A	Table	JSch1987Proj1v1Appendix.doc	786 Kb	Apr 23, 2008	Paul Als, Copy Editor	Error
☐	5	10.300/JXYZ-D-07-00073.1 JXYZ-D-07-00073 X Holland (Belgium) Papillary fibroelastoma of a mitral valve chordae – case report		Copyedited Text (P)		Document	Maintext.doc	2.4 Mb	Jun 23, 2008	Paul Als, Copy Editor	Error
☐	5	10.300/JXYZ-D-07-00073.1 JXYZ-D-07-00073 X Holland (Belgium) Papillary fibroelastoma of a mitral valve chordae – case report		Corrected Figure (P)	Labels replaced by Art.	Figure	Figure1.jpg	12.4 Mb	Mar 1, 2008	Andy Jones, Art Team	Error
☐	5	10.300/JXYZ-D-07-00073.1 JXYZ-D-07-00073 X Holland (Belgium) Papillary fibroelastoma of a mitral valve chordae – case report		Corrected Figure (P)	Labels rplcd. by AT	Figure	Figure 2.gif	786 Kb	Mar 1, 2008	Andy Jones, Art Team	Error
☐	5	10.300/JXYZ-D-07-00073.1 JXYZ-D-07-00073 X Holland (Belgium) Papillary fibroelastoma of a mitral valve chordae – case report		Corrected Figure (P)	Colour recal.	Figure	Figure 3.jpg	4.1 Mb	Mar 1, 2008	Andy Jones, Art Team	Error
☐	7	10.300/JXYZ/D-08-00183.2 JXYZ/D-08-00183 Ch. DeBroglie (Denmark) Endoscopically Treated Gastritis Cystica Polyposa		Corrected Text (P)	RFP	Document	Maintext.doc	24.6 Mb	Jun 24, 2008	A. Aldens, Typesetter	Error

Check All   Clear All

Cancel   Submit

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Files selected from associated submissions remain with those submissions, but also appear in the Schedule Group File Inventory, and when assigning tasks. Note that only Submission Companion Files linked to Submissions can display Reference Checking or Artwork Quality Checking results:


TO CONFIGURE ROLEMANAGER:
Per current functionality, the *Manage Schedule Groups* folder can be accessed by Editor and Publisher roles configured with the 'Manage Schedule Groups' permission.

To allow access to the new <u>History</u> action link, configure the relevant Editor and Publisher roles with the new 'View Schedule Group Production Task Assignment History' and 'View Schedule Group Production Correspondence History' permissions (located under 'General Searching and Viewing' for Editors, 'Preprint Manager' for Publishers):

Editor (Publisher layout not shown):
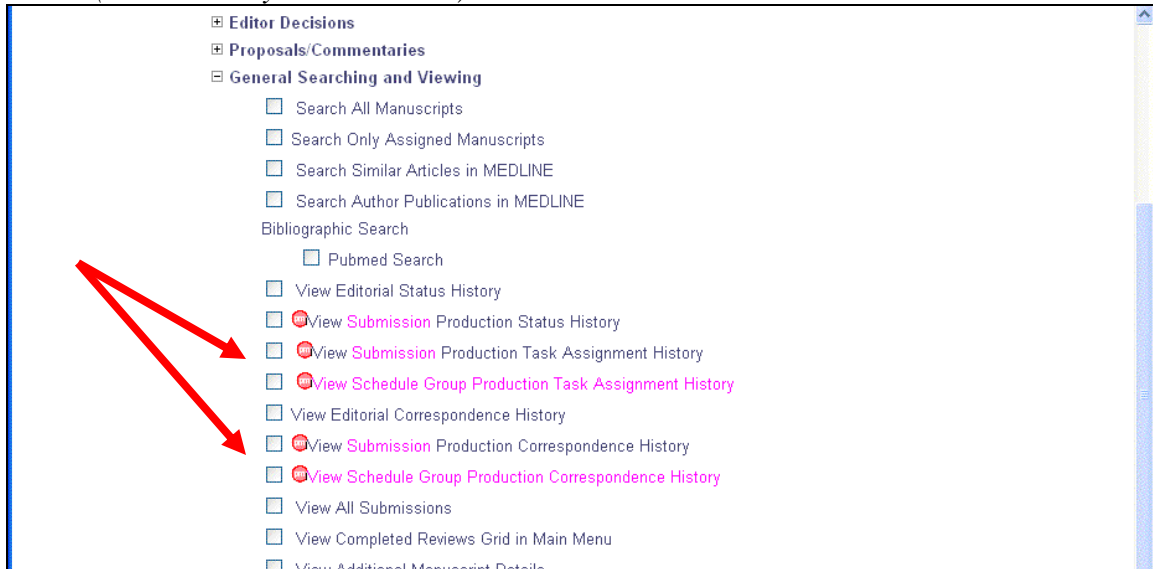
To allow access to the <u>File Inventory</u> link, configure the required Editor and Publisher roles with the 'Download Companion Files' or 'Upload, Hide and Restore Companion Files' permissions (located under 'Edit Submissions for Editors, 'General Searching and Viewing' for Publishers). These are the same permissions used to access Submission File Inventories:

Editor (Publisher layout not shown):
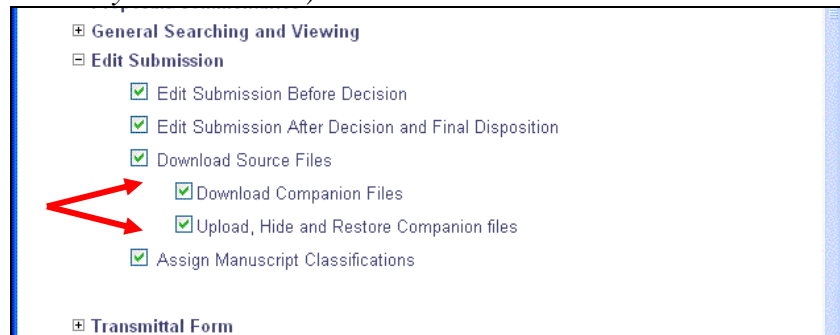
Assigning a Production Task for a Schedule Group

Version 7.0 allows the creation of Production Tasks for Schedule Groups. These tasks are a separate list from the existing Production Tasks (now referred to as Submission Production Tasks). There are no Schedule Group Production Tasks when you first upgrade to version 7.0.

TO CONFIGURE TASKS:
A new Configure Schedule Group Production Tasks link has been added to the Preprint Manager section of PolicyManager (and the existing Configure Production Tasks link has been renamed to Configure Submission Production Tasks).
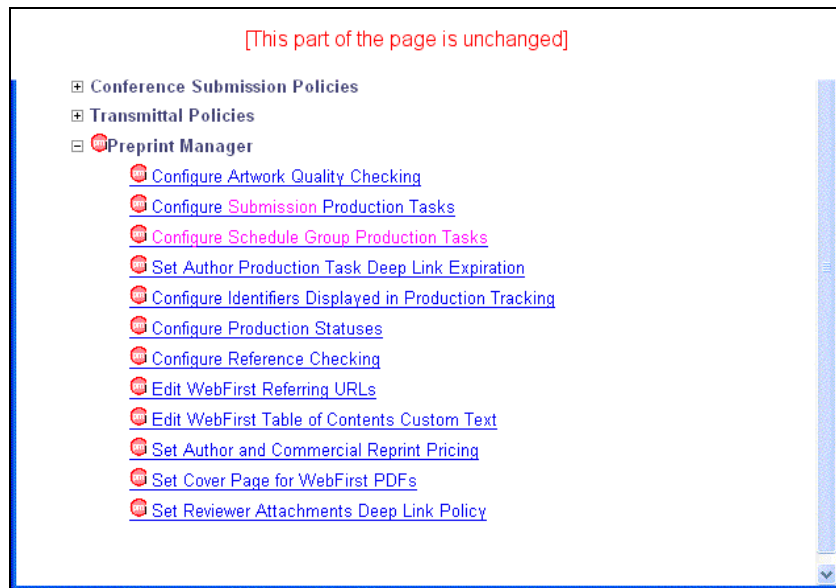
This leads to a list of all Schedule Group-specific Production Tasks configured in the system, similar to the existing list of Submission-specific Production Tasks. Use the Add functionality to create new Production Tasks for use with Schedule Groups (there will be no Schedule Group Production Tasks on upgrade to 7.0), or use the Edit functionality to change the configuration of tasks once they are created.

Schedule Group Production Tasks configuration is very similar to that for Submission Production Tasks:

Under Assignment Options, Schedule Group Production Tasks cannot be assigned to Corresponding Authors; this option is not available, and you must select at least one Editor or Publisher role for both the 'Can be Assigned by:' and 'Can be Assigned to:' options.

Note that you can allow Follow-on Task Assignments from a Schedule Group Task; for

this to be useful, the 'Can be Assigned to' roles should be able to assign the Schedule Group Task, or Tasks, that normally follow on from this particular type of task.

Schedule Group Production Tasks can be configured to automatically transfer files to the assignee via FTP, and to receive files back in the same way, per current functionality for Submission Tasks. This uses new FTP Transmittal Methods and Import Profiles specific to Schedule Group tasks; if you wish to set these up, you should contact your Aries representative.

The Companion File Options are identical to the Submission Companion File options for submission files. Note that if you wish to allow suppliers to return files via FTP, the task must be limited to a single Companion File Type that can be uploaded when the task is Submitted.

The Scheduling and Due date options are simpler for Schedule Group Tasks:

- They cannot be configured to appear in the Production Status Grid.
- They cannot be configured to be included in At Risk and Must Start By date calculations.
- There is no Due Date option based on Submission Target Online Publication Date; only target dates from the Schedule-Group can be used.

The Letter Options are unchanged from the Submission Tasks; both Submission and Schedule Group Tasks share the same pool of letters in the 'Production' letter family.

After the site administrator has created Schedule Group Production Tasks, they can be used to assign entire Schedule Groups of work to people. In a similar fashion to the existing Submission-based Production Task functionality, the Assign Production Task link allows the user to assign production tasks, however the task recipient may now be asked to process all submissions within the schedule group.

The basic page flow is identical to submission-based Production Task assignments, with an initial task selection page followed by a main page where the assignee is selected, the letter customized, and any files required to complete the task made available to the assignee:

Once a task is selected from the Schedule Group Production Task drop-down list, the page below is displayed.

Assign Production Task for Schedule Group: 6(3) May 2008 Issue

[Cancel]   [Assign Task and Send Letter]

Schedule Group: 6(3) May 2008 Issue

Production Task: Typeset Issue

Warning: all scheduled dates for this task have already passed and the system has used today's date as a substitute. You should check the due date in case you wish to enter a later date.

- Due Date of Jul 12, 2007 to meet the Schedule Group Target Online Publication Date (Aug 13, 2007)
- Due Date of Jul 12, 2007 to meet the Schedule Group Target Publication Date (Aug 13, 2007)

Due Date: [10/23/2007   ] 📅 (mm/dd/yyyy)

Task Assigned to: [Please Choose a Person   ▼]

Assignment Letter: Additional recipients can be copied by typing their e-mail addresses into the blank boxes next to cc: Multiple e-mail addresses can be included, separated by semicolons(;).

From: seantest50@emtesting.co.uk;slavelle@ariessys.com

To:

Letter Purpose: TS Out: Request to Paginate Issue

Letter Subject: [Request to paginate issue %SG_DESCRIPTION%   ]

cc: [   ]

Line Wrap: [soft ▼]

Letter Body: [Insert Special Character]   [Preview Letter]   [Open in New Window]

```
Dear %GREETING%,

We would like you to carry out a task for us. Due on %PRODTASK_DUE_DATE%.

John MacJohn

-----[List of PT merge fields]---------------

PROD_STATUS: In Production
PRODTASK: Format manuscript
PRODTASK_DUE_DATE: %PRODTASK_DUE_DATE%
PRODTASK_ASSIGN_DATE: Oct 23, 2007
PRODTASK_ASSIGNEDBY: John MacJohn
PRODTASK_ASSIGNEDTO: %PRODTASK_ASSIGNEDTO%
PRODTASK_COMPLETED_DATE:
PRODTASK_LASTREMIND_DATE:
PRODTASK_DAYS_LATE:
PRODTASK_REMIND_COUNT:
PRODTASK_STATUS: Open
SENDER: John MacJohn
REALNAME: %REALNAME% (Recipient)
```

Companion Files

[Upload Companion File]   [Select Companion Files from Submissions]

[Cancel]   [Assign Task and Send Letter]

Per submission assignments, Companion Files from the Schedule Group File Inventory can be made available to the Task Recipient. In addition, the 'Select Companion Files from Submissions' button allows users to also select files from submissions in the Schedule Group as described above.

The recipient of the task will be able to download the selected files from the *Assignment Files* page in the *Schedule Group Tasks Assigned to Me* folder:

Assignment Files for Schedule Group: 3(1)
Production Task: Paginate Issue

[Production Task Instruction Text]

Close
Download Zip File

Assignment Files

Sub. TOC Position ▲▼	Submission	Color Code ▲▼	Item ▲▼	Description ▲▼	File Name ▲▼	Date Last Modified ▲▼	Date Last Downloaded ▲▼	QC Results ▲▼	Action ▲
			Issue - Online	All files for Web	issue.html	Oct 03, 2004		N/A Untested	Download
		🟩	Issue - Print	Paginated issue	issue.pdf	Oct 18, 2004		N/A Untested	Download
1	10.300/JXYZ-D-04-00071.1 JXYZ-D-04-00071 John Smith (France)	🟥	Copyedited Text (P)	Text CEd by JC; minor cleanup, no queries	SmithJ_AntiMatterdevices_page_proofs_version2.doc	Mar 14, 2007	Jun 25, 2008	N/A Untested	Download
2	10.300/JXYZ-D-06-00082.1 JXYZ-D-04-00082 Alan Quartermaine (United Kingdom) Anterior uveitis following combined vaccination for measles, mumps and rubella (MMR): a report of two cases	⬜	Corrected Text (P)	RFP	Qmaine_1994_AssessingQBitEfficiency.rtf	Apr 16, 2008	Jun 26, 2008	N/A Untested	Download
4	10.300/JXYZ-D-07-00001.1 JXYZ-D-07-00001 Johan Schmidt (Austria) Cartilage-Derived Retinoic Acid-Sensitive Protein and Type II Collagen Expression During Fracture Healing Are Potential Targets for Sox9 Regulation	⬜	Copyedited Text (P)		JSch1987Proj1v1Maintext.doc	Apr 23, 2008		N/A Untested	Download
4	10.300/JXYZ-D-07-00001.1 JXYZ-D-07-00001 Johan Schmidt (Austria) Cartilage-Derived Retinoic Acid-Sensitive Protein and Type II Collagen Expression During Fracture Healing Are Potential Targets for Sox9 Regulation	⬜	Copyedited Text (P)	Appendix A	JSch1987Proj1v1Appendix.doc	Apr 23, 2008		N/A Untested	Download
5	10.300/JXYZ-D-07-00073.1 JXYZ-D-07-00073 X Holland (Belgium) Papillary fibroelastoma of a mitral valve chordae – case report	⬜	Copyedited Text (P)		Maintext.doc	Jun 23, 2008		N/A Untested	Download
7	10.300/JXYZ/D-08-00183.2 JXYZ/D-08-00183 Ch. DeBroglie (Denmark) Endoscopically Treated Gastritis Cystica Polyposa	⬜	Corrected Text (P)	RFP	Maintext.doc	Jun 24, 2008		N/A Untested	Download

Download Zip File
Close

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TO CONFIGURE:
Create new Assignment, Cancellation and Submit Task letters for new tasks, if required, from PolicyManager, Edit Letters. Create these letters in the 'Production' letter Family.

A new %SCHEDULEGROUP_TOC% merge field inserts a list of all submissions currently assigned to the schedule group. For each submission, the system lists the TOC Position plus the identifiers configured to appear in Production. e.g.:

```
1; 10.300/JXYZART-JXYZ-D-08-00004.1; JXYZ-D-08-00004; John Smith
(United Kingdom); Assessment of testing efficiency in university
Hospitals
2; 10.300/JXYZART-JXYZ-D-07-00123.1; JXYZ-D-07-00123; Art Jones
(United States); Long term epidemiological studies in sub-Saharan
tribes
```

Several existing merge fields allow you to include information from the Schedule Group in these letters:

- %SCHEDULEGROUP_DESCRIPTION%

- %SCHEDULEGROUP_TARGET_VOLUME%

- %SCHEDULEGROUP_TARGET_ISSUE%

For tasks that use the Production Task FTP feature, the %PRODUCTION_TASK_GUID% merge field inserts a code unique to the individual production task assignment.