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Aries Systems Corporation

Release Notification

Editorial Manager/Preprint Manager
7.1 General Release Notification
8/31/2009
Draft – Subject to Change

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Document Change Log

Date	Version	Change
08/31/2009	General Release	Addition of ‘Submission Production Tasks Custom Report View’ section

Editorial Manager/Preprint Manager 7.1 General Release Notification

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GENERAL ENHANCEMENTS

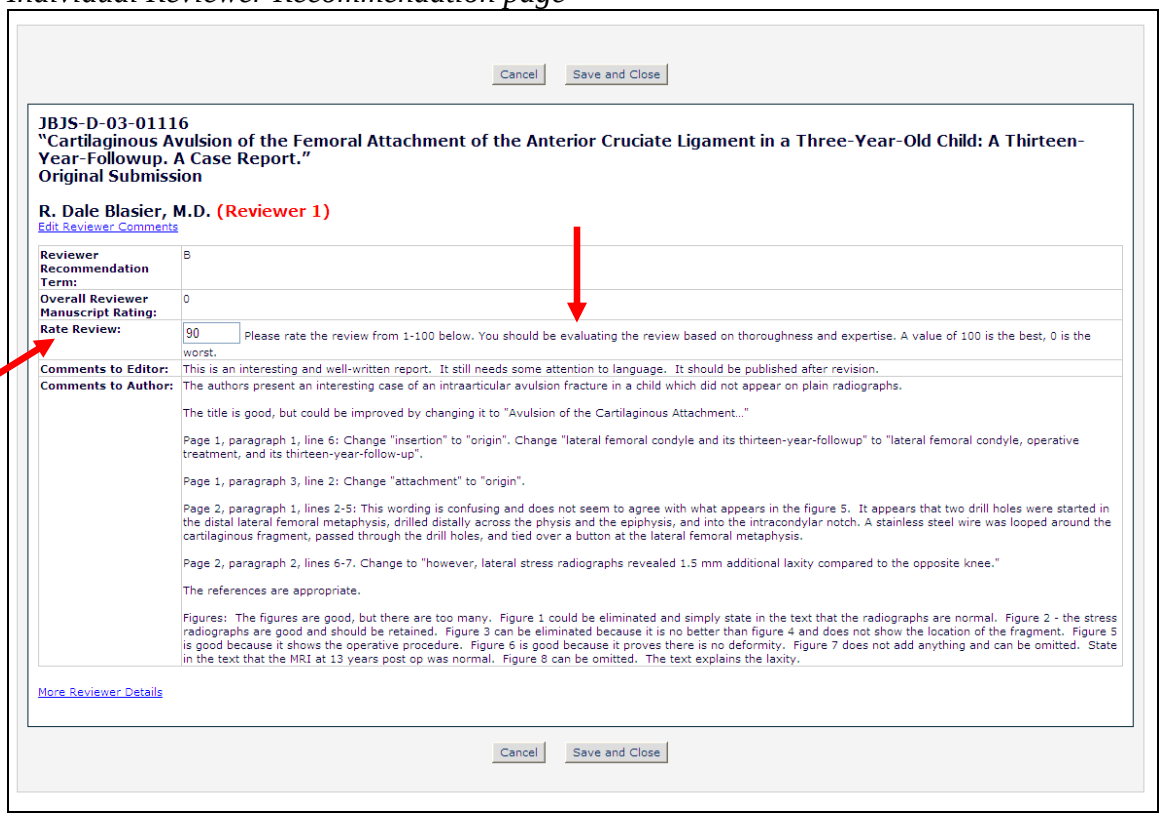
Enhancements to Review Ratings by Editor

In EM v7.0, Editors can rate the quality of a review when submitting a decision on a manuscript. To do this, the Editor must click on a Reviewer Recommendation Term on the *Submit Editor's Decision and Comments* page, and enter a value (Rate Reviewer: 1-100) on the target page *View Individual Reviewer Comments*. This must be done separately for each review the Editor wants to rate. Also, there is no explanation of what the 1-100 scale means for the review rating, or the criteria by which the publication wants the Editor to evaluate the review.

NOTE: The Editor's Review Rating enhancements should not be confused with the existing Overall Reviewer Manuscript Rating and Overall Editor Manuscript Rating features in EM. Both of these ratings are enabled on the *Overall Manuscript Rating Question Settings* page in PolicyManager, and allow Reviewers and Editors to rate submissions from 1-100.

In EM v7.1, the publication can provide Editors with customized instructions to explain what the 1-100 scale means. The 'Rate Reviewer' label is changed to 'Rate Review', to more accurately reflect what the Editor is doing (i.e. the Editor is rating the *review*, not the person who performed the review).

Individual Reviewer Recommendation page



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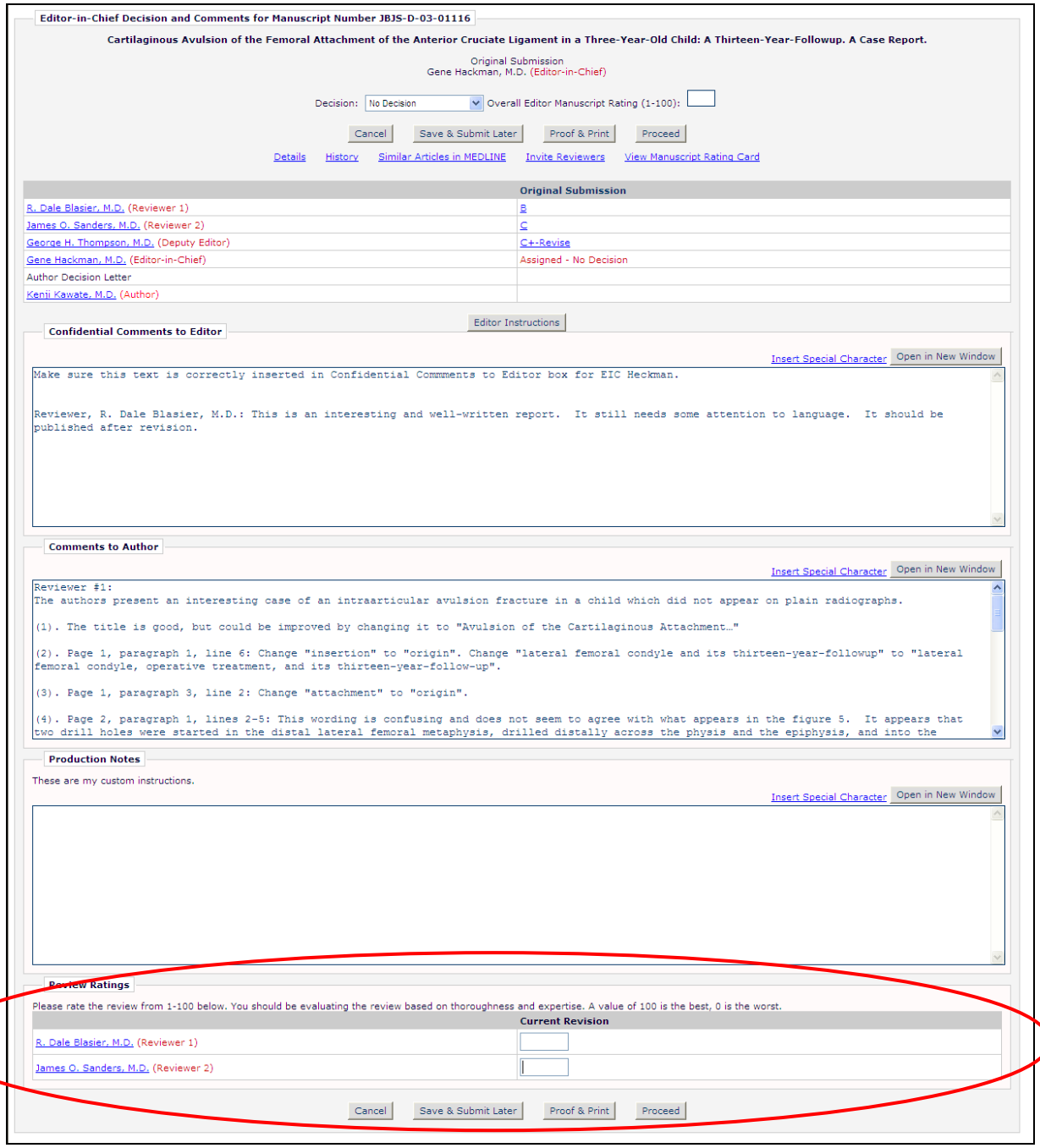
To make the Review Rating process simpler for Editors, there is a new option to display Review Ratings directly on the *Submit Editor's Decision and Comments* page.



There is also an option to require that all reviews for the current revision are rated *before* the Editor can submit his decision. If this option is enabled, and the Editor tries to submit his decision without entering Review Ratings for all reviews for the current revision, an alert is displayed.

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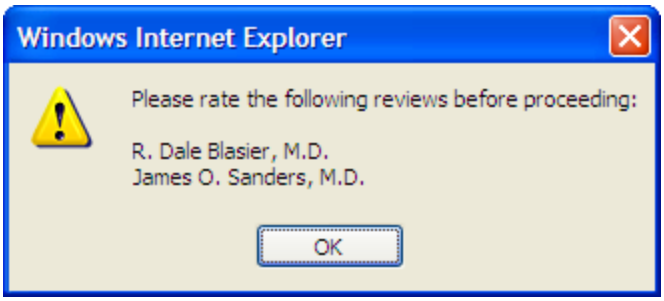
em Editorial Manager™



It is important to note that there is only *one* Editor rating for each review, for each revision of the submission. So, if there are two or more Editors in the decision chain, they all share the single Review Rating. For example: The Associate Editor enters a rating of 85 when making his decision. The Editor-in-Chief can then change the rating to 50, but cannot add a separate rating of her own. This also means that the option requiring an Editor to rate all reviews before submitting a decision applies to the *lowest* Editor in the chain. In the example above, the Associate Editor would be required to rate all reviews for the current revision before submitting his decision. The Editor-in-Chief would be able to modify the Associate Editor's ratings, and would also be required to rate any new reviews that came in while the Editor-in-Chief was handling the paper. The system will not track the history of all ratings entered; only the ratings in place when the final decision is made will be stored in the system.

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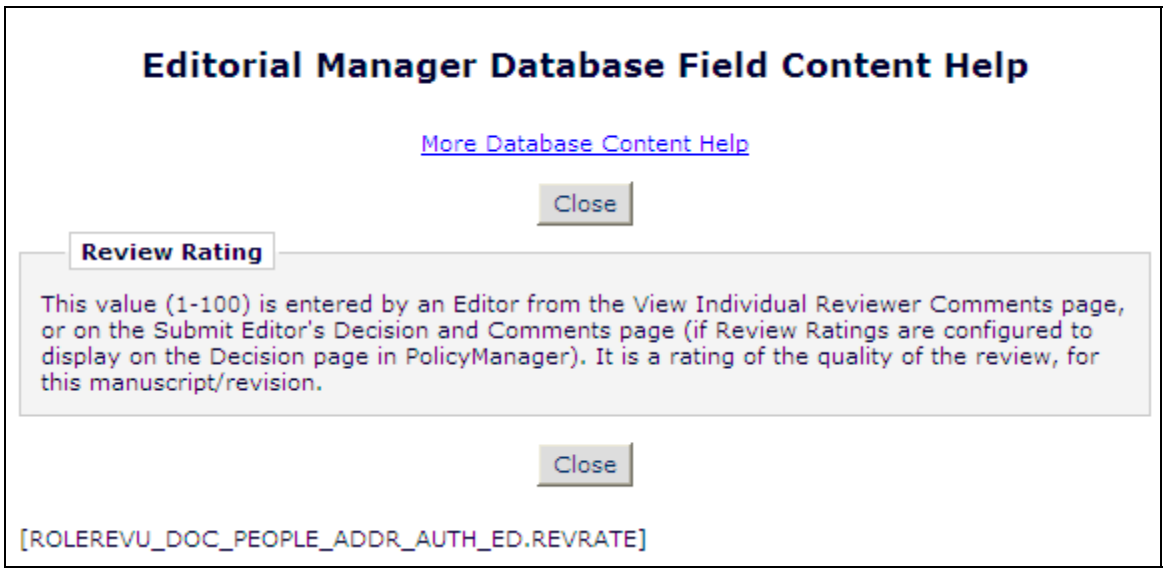
For consistency purposes, the term ‘Reviewer Rating’ on the Reviewers & Submissions Custom Reports View is changed to ‘Review Rating’.

NOTE: This label is also changed to ‘Review Rating’ in General Data Export, in the Reviewer Assignments table [ROLEREVU.REVRATE].

The help text displayed when the user clicks the Review Rating link above has also been clarified.



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TO CONFIGURE:
Go to PolicyManager and click the new Configure Options for Review Rating link.

Select the checkbox 'Display Review Ratings on the 'Submit Editor's Decision and Comments' page' to show the Review Ratings on the *Submit Editor's Decision and Comments* page. Once this box is selected, you can also select 'All reviews for the current revision must be rated before Editor's decision is made.' Finally, you can enter customized instructions, if desired. The default instructions are 'Please enter a number from 1-100.'

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New Option for Editing Submissions

In v7.0 of EM/PM, when Editors or Publishers click the 'Edit Submission' Action Link for a submission, a warning message is presented alerting the user to rebuild the PDF and approve the changes as quickly as possible if the submission is assigned to Editors or Reviewers. The submission is not removed from the workflow, but a PDF needs to be rebuilt and approved to move the submission out of the 'Incomplete Submissions' folder.

New in v7.1, when an Editor or Publisher clicks the 'Edit Submission' Action Link for a submission entered by an Author, they are brought to a new page allowing them to choose to edit the submission using the existing method (requiring that a PDF be rebuilt and approved), or using a new, shorter interface where they can edit metadata items and attach files without having to rebuild the PDF.

NOTE: If the submission is currently in the 'Incomplete Submissions' folder, then the submission can only be edited using the existing method.

If the user chooses the 'Edit the submission data only' option, they will see a new version of the Edit Submission interface, comprised of three steps:

- Enter Metadata: This page will display all fields as configured for the Article Type of the submission
- Add/Edit/Remove Authors: This is the same as the existing page of the same name
- Attach Files: This page allows Editors to add new files to the submission. NOTE: These files will not be included in the Author/Editor or Reviewer versions of the PDF files, but will be available on the *File Inventory* page for the submission. These files can be included in the PDF at a later time by editing the submission using the 'Edit the submission' option and rebuilding the PDF for approval.

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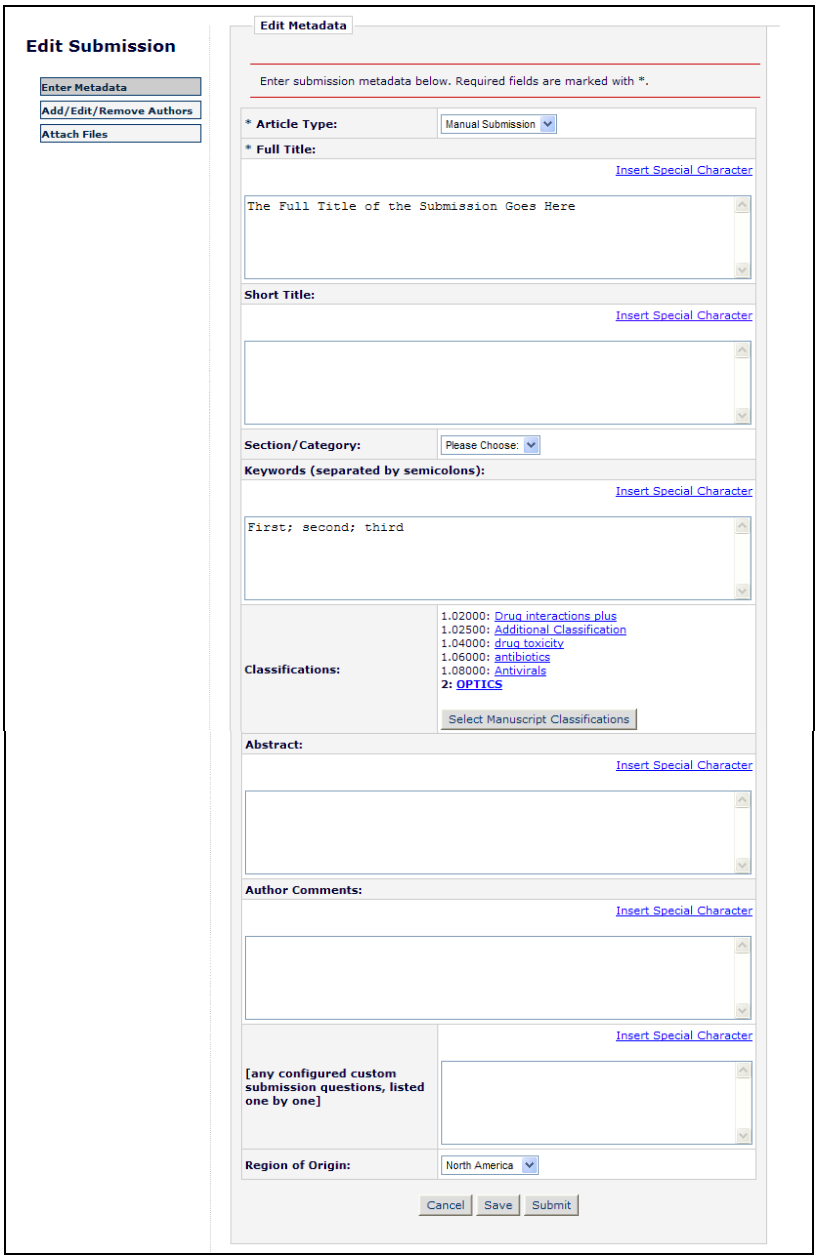

TO CONFIGURE:
No additional configuration necessary. This option is available for all Editor and Publisher roles with the 'Edit Submission Before Decision' and/or 'Edit Submission After Decision and Final Disposition' permissions enabled.

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Additional Manuscript Details for Specific Article Types

In EM v7.0, system administrators have the ability to specify Additional Manuscript Details fields (AMDs) to allow Editors to provide additional information related to a submission. This information is available from the *Details* pages for edit or for review, and can also be displayed on the Transmittal Form or used as a search criterion in *Search Submissions*. AMDs are then displayed for all submissions of a non-Proposal Article Type.

New in v7.1, the functionality of the AMDs is enhanced so that the system administrator may configure an AMD to display for all Article Types, or only selected Article Types.

On upgrade, all existing AMDs will continue to display for non-Proposal Article Types. After upgrade you may choose to edit the existing AMDs to display for a more specific sub-set of Article Types.

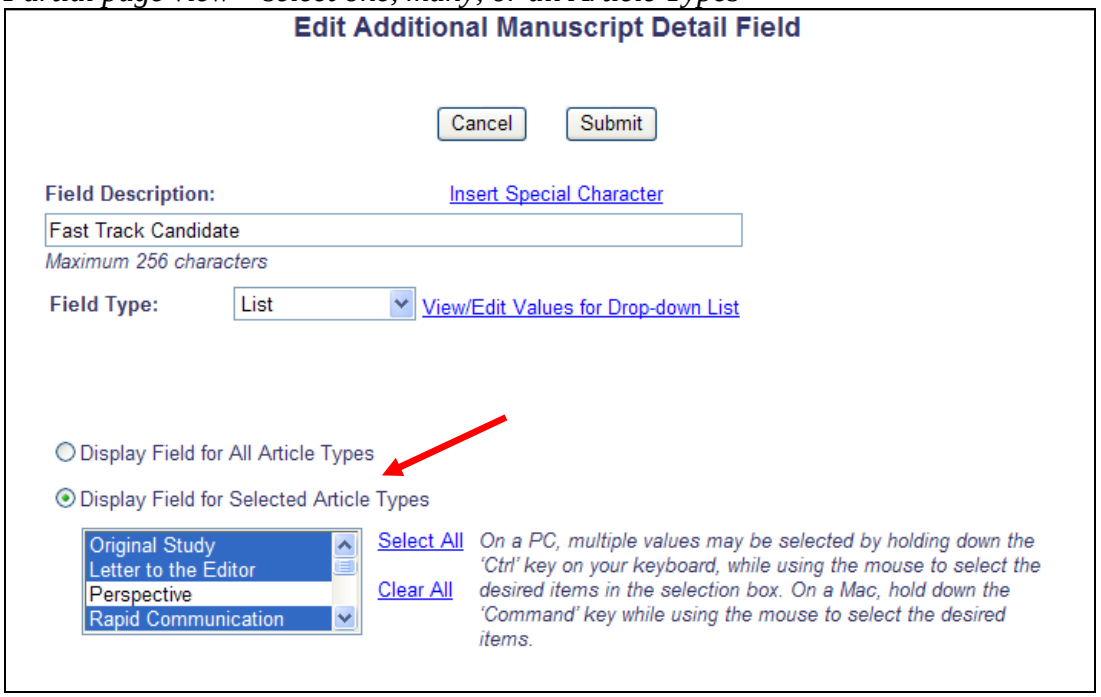
Any new AMDs added after upgrade will have the 'Display Field for All Article Types' option selected by default.

TO CONFIGURE:

In PolicyManager, navigate to the *Add/Edit Additional Manuscript Detail Fields* page in the 'Additional Data Policies' section. Edit an existing field, or Add a new field.

Select whether you would like this AMD to be displayed for all Article Types, or only a selected sub-set of Article Types.

Partial page view – select one, many, or all Article Types



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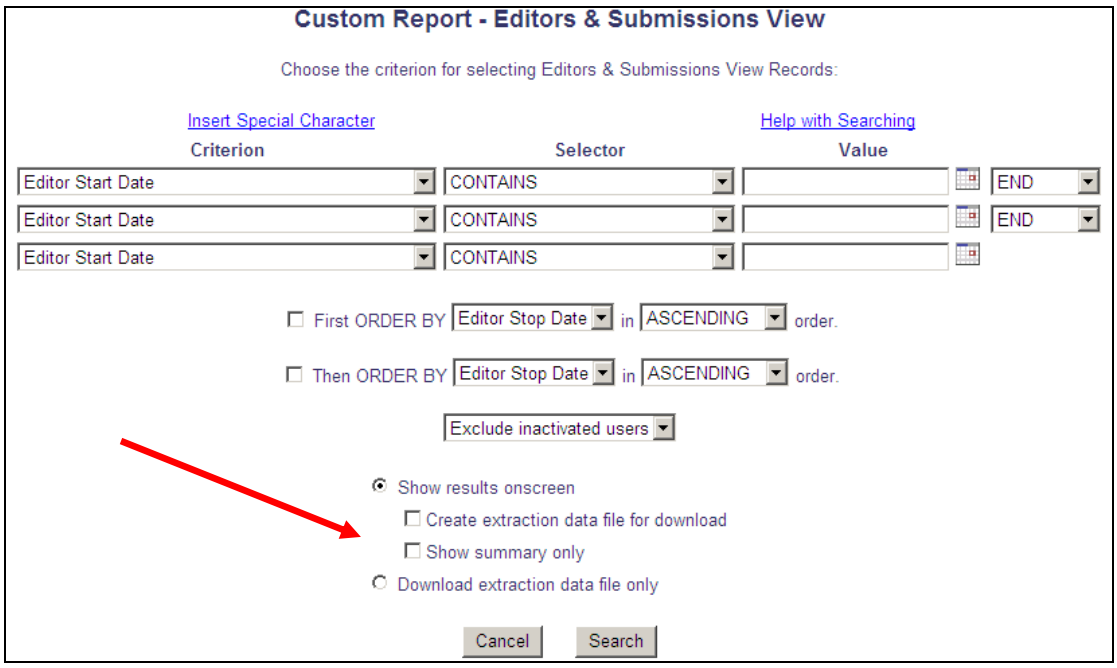
‘Download Only’ Option for Custom Report Results

New in EM v7.1, custom report results may now be displayed in any of three ways:

1) Onscreen (either full results or summary results)
2) Onscreen with the option to download a tab-delimited file
3) With no onscreen results and only the option to download a tab-delimited file

While options 1 and 2 existed in EM version 7.0, they have been redesigned so that the checkboxes now appear under a radio button labeled ‘Show results onscreen’. Option 3 is a new feature in EM v7.1. This option allows users to generate reports and extract the data without the extra step of viewing it onscreen before download.

At upgrade, all existing reports retain their saved selections –‘Create extraction data file for download’ or ‘Show Summary Only’.



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When ‘Download extraction data file only’ is selected, the Results screen now looks like this:

TO CONFIGURE:
No configuration is necessary. Editors must have ‘Produce Reports’ RoleManager permission to access Custom Reports.

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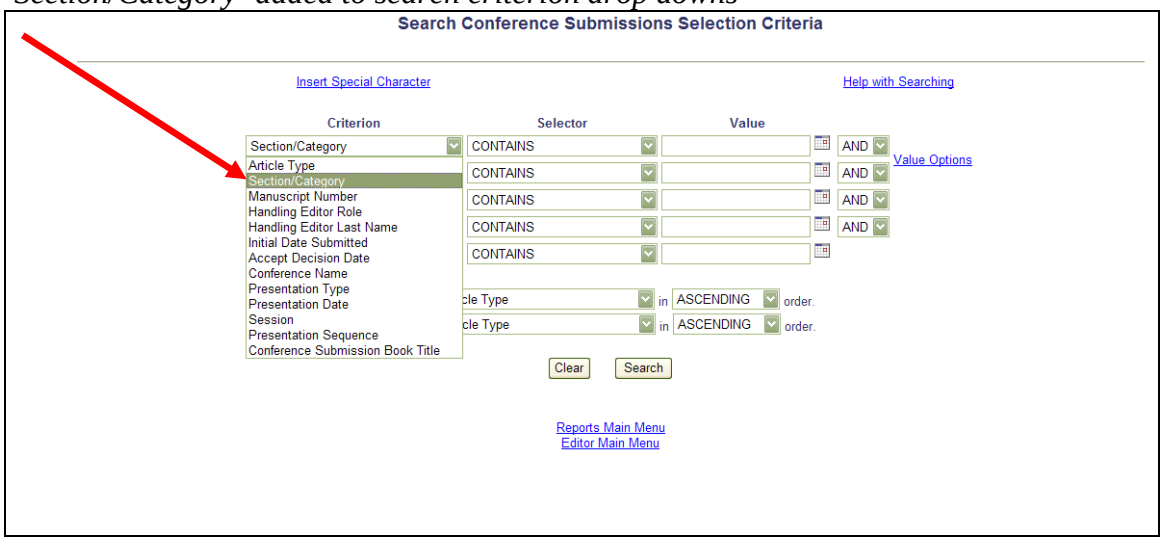
CONFERENCE SUBMISSION ENHANCEMENTS

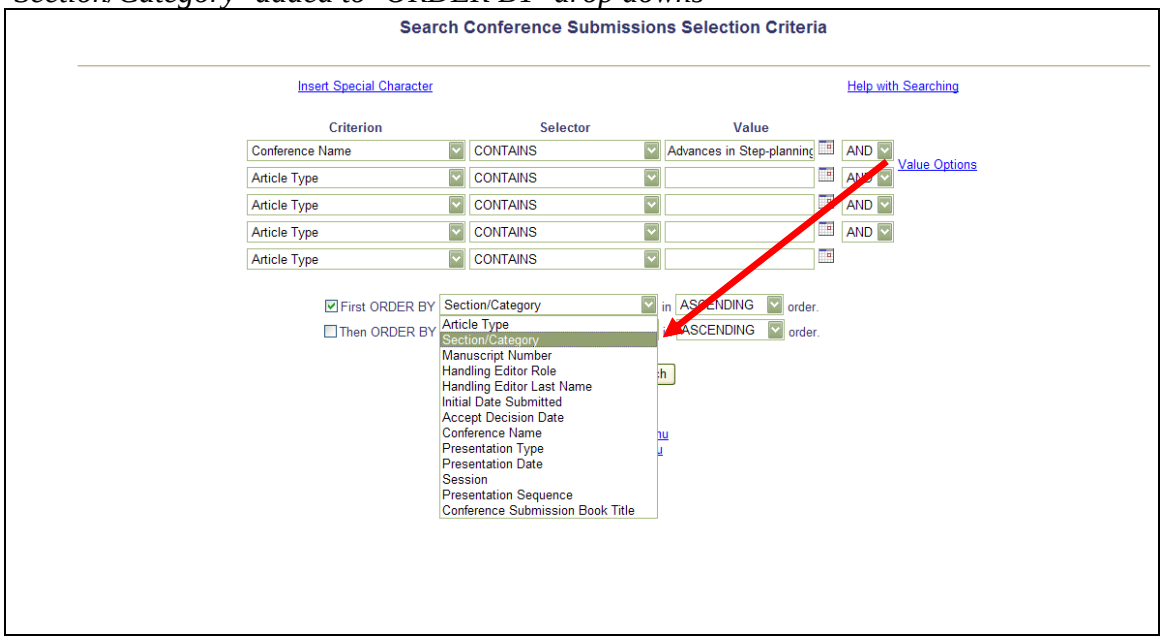
Search by Section/Category Now Available

The Search/Manage Conference Submissions tool is enhanced in v7.1 so that searching by Section/Category is now possible. The search results may now also be ordered by Section/Category.

'Section/Category' added to search criterion drop downs



'Section/Category' added to 'ORDER BY' drop downs



The 'Value Options' pop-up (available via the link on the *Search/Manage Conference Submissions* page) has also been modified. The available Sections/Categories are now displayed, the Conference Metadata Field values are now listed in the publication-configured order, and the layout of the page has been enhanced.

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New 'Search Criteria Value Options' page

TO CONFIGURE:
No additional configuration is required; this will appear for all Roles configured with the 'Search/Manage Conference Submissions' permission. Please note that the Conference Metadata Field values now appear on the 'Value Options' pop-up in the order configured in PolicyManager, where previously they appeared in alphabetical order.

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PROPOSAL ENHANCEMENTS

Proposal Menu Changes

The existing *Proposal Menu* page is enhanced in v7.1 to include three new folders for viewing Proposals with Invitations in various states. Some existing folder links are also moved for clearer organization. The three new folders are displayed for Editors with 'View All Proposals and Submissions with Commentaries' permission enabled.

1. The View All Assigned Proposals folder link now displays directly under the existing My Pending Proposals folder link.
2. A new 'Proposals With Invitations In Progress (x)' subheading is displayed in the 'Active' proposals section, just beneath the View All Submissions with Pending Commentaries folder link. The 'x' is a count of the unique proposals that are displayed in the three new folders described below.
3. The three new folders displayed under the 'Proposals With Invitations In Progress' are:
    - Proposals With Outstanding Invitations (x): This folder displays a list of all open Proposals where an Editor has invited at least one Author to submit a manuscript based on the proposal and at least one Invited Author has yet to respond to the invitation. The (x) equals the number of proposals listed in the folder. The (x) equals '0' and the link is inactive when there are no proposals that fit the criteria.
    - Proposals With Invited Submissions In Progress (x): This folder displays a list of all open Proposals with at least one associated invitation record which has been accepted by the Author but for which an invited submission has not been received. The (x) equals the number of proposals listed in the folder. The (x) equals '0' and the link is inactive when there are no proposals that fit the criteria.
    - Proposals With Invited Submissions Received (x): This folder displays a list of all open Proposals with at least one associated invitation record which has been accepted by the Author and where the invited submission has been approved and submitted by the Author. The (x) equals the number of proposals listed in the folder. The (x) equals '0' and the link is inactive when there are no proposals that fit the criteria.

If a proposal appears in more than one of the three new folders, the proposal only counts as '1' in the total count listed beside the 'Proposals With Invitations In Progress (x)' subheading. For example:

- There is only one active proposal for a Publication, but it has three related invitations. The first Invited Author has not responded, the second Invited Author has accepted the invitation to submit but has not submitted yet, and the third Invited Author has submitted. The following counts show in this scenario:
    - Proposals With Invitations In Progress (1)
        - Proposals With Outstanding Invitations (1)
        - Proposals With Invited Submissions In Progress (1)

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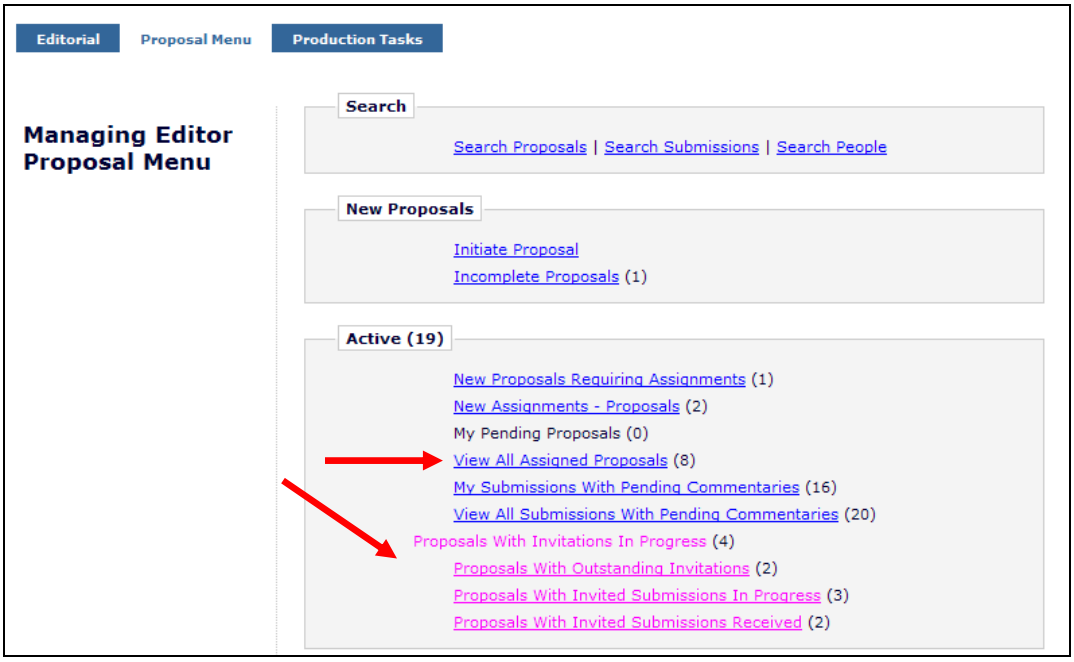
- Proposals With Invited Submissions Received (1)



TO CONFIGURE:
No configuration is necessary; these changes are made for all Editors with access to the Proposals menu.

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Additional Manuscript Details can now be used with Proposals, including Search Proposal

In EM v7.0, system administrators have the ability to specify Additional Manuscript Details fields (AMDs) to allow Editors to provide additional information related to a submission. The AMDs are not available for Article Types in the Proposal family.

New in v7.1, AMDs may be available for Article Types in the Proposal family. System Administrators may choose to make AMDs available for all Article Types, or for specific Article Types chosen from a menu of all non-hidden Article Types.

When an AMD field is configured to display for an Article Type in the Proposal family, then the AMD field is available for edit or review (depending on configuration) for Editors on the *Details* page for a Proposal.

Also, new in 7.1, the AMD may now be available as a search criterion on *Search Proposals*.

At upgrade, all existing AMDs will be limited to display for non-Proposal family Article Types. Also, the AMD will be marked as 'Hide' on *Search Proposals* by default. Any new AMDs added after upgrade will be available for all Article Types by default, but will also be 'hidden' on *Search Proposals* unless configured otherwise at the time of creation.

TO CONFIGURE:
In PolicyManager, navigate to the *Add/Edit Additional Manuscript Detail Fields* page in the 'Additional Data Policies' section. Edit an existing field, or Add a new field.

Select whether you would like this AMD to be displayed for all Article Types to include those in the Proposal family, or only a selected sub-set of Article Types, for example, only those in the Proposal Family.

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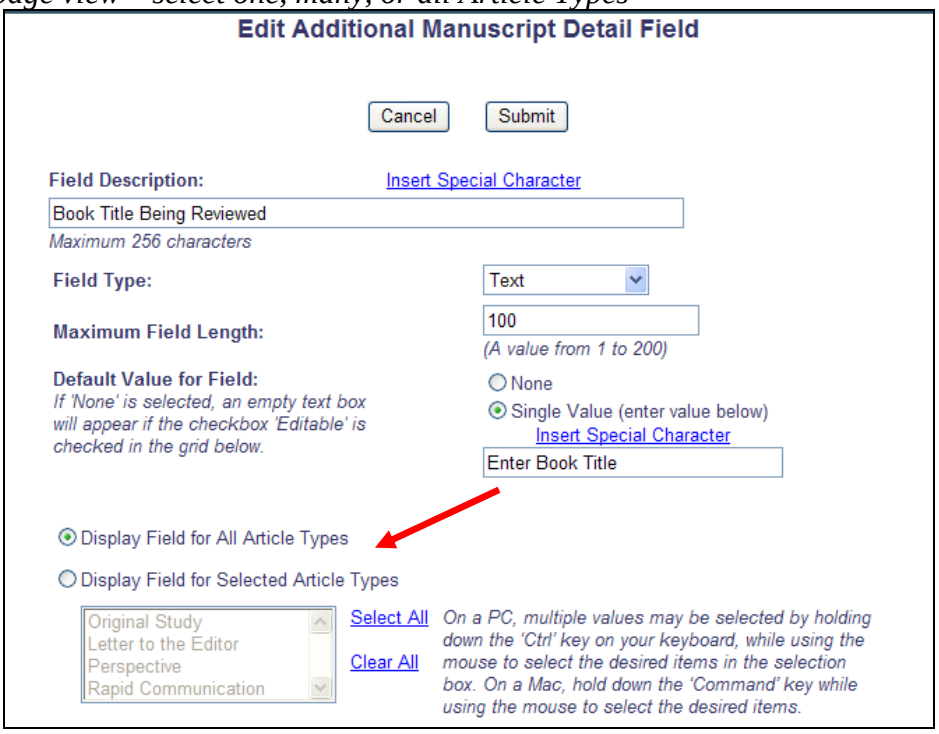
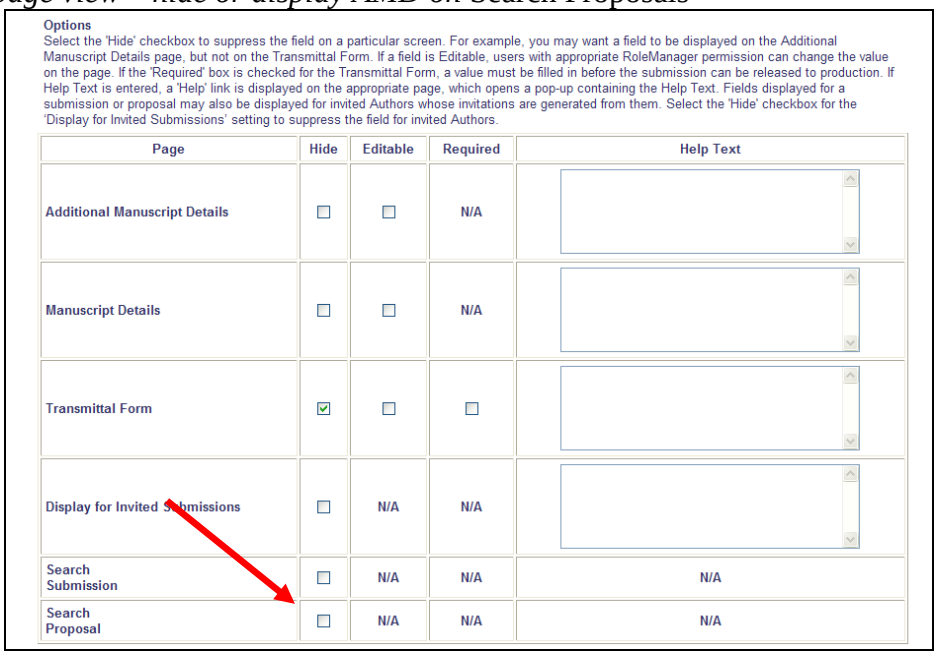
Partial page view – select one, many, or all Article Types



In the 'Options' grid at the bottom of the *Add/Edit Additional Manuscript Detail Fields* page, de-select/uncheck the box in the 'Hide' column next to the 'Search Proposal' option to make this AMD a search criterion on the *Search Proposals* page.

Partial page view – hide or display AMD on Search Proposals



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Additional Manuscript Details Associated with a Proposal or an Article on which a Commentary has been Solicited can now be Displayed to Invited Authors

In EM v7.0, Additional Manuscript Details (AMDs) can be configured for Article Types in the 'Regular' or 'Conference Submssion' Article Type Families, but not for the 'Proposal' Article Type Family. New in v7.1, AMDs may be associated with one, many, or all Article Types in any of the Families.

Also in v7.1, additional functionality is available for use with Proposals, or with submissions for which a Commentary is solicited (a 'Parent Submission'). AMDs may be configured to 'Display for Invited Submissions'. This means that, when an Editor initiates a Proposal using an Article Type for which the AMD is displayed, or solicits a Commentary on a submission of an Article Type for which the AMD is displayed, the Editor may provide additional information in these AMD fields that the Invited Author may then view when choosing to accept the invitation.

Example Workflow:
A publication would like to use Proposals to solicit book reviews from Authors, which will be published in a special edition. The Publication may choose to configure some Additional Manuscript Detail fields to capture supplemental information about the book being reviewed, such as the book title, the original publication date, the number of pages, etc. These AMDs would be added on the *Add/Edit Additional Manuscript Detail Field* page.

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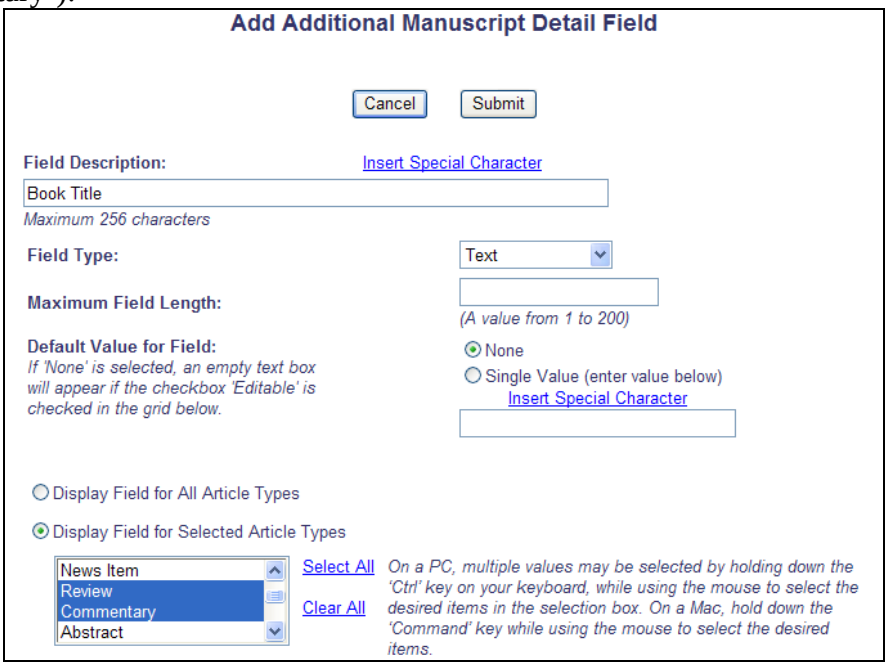
The top section of the page would be where the title of the AMD field is entered, including a default value (if desired). You would also select which Article Types this AMD will be available for (in this example, we have chosen 'Review' and 'Commentary'):



Using the grid at the bottom of the page, you will de-select/uncheck the box next to the 'Display for Invited Submissions' option. This setting allows the information entered in this AMD field by the Editor to be displayed (read-only) to any Invited Authors for that submission/proposal.

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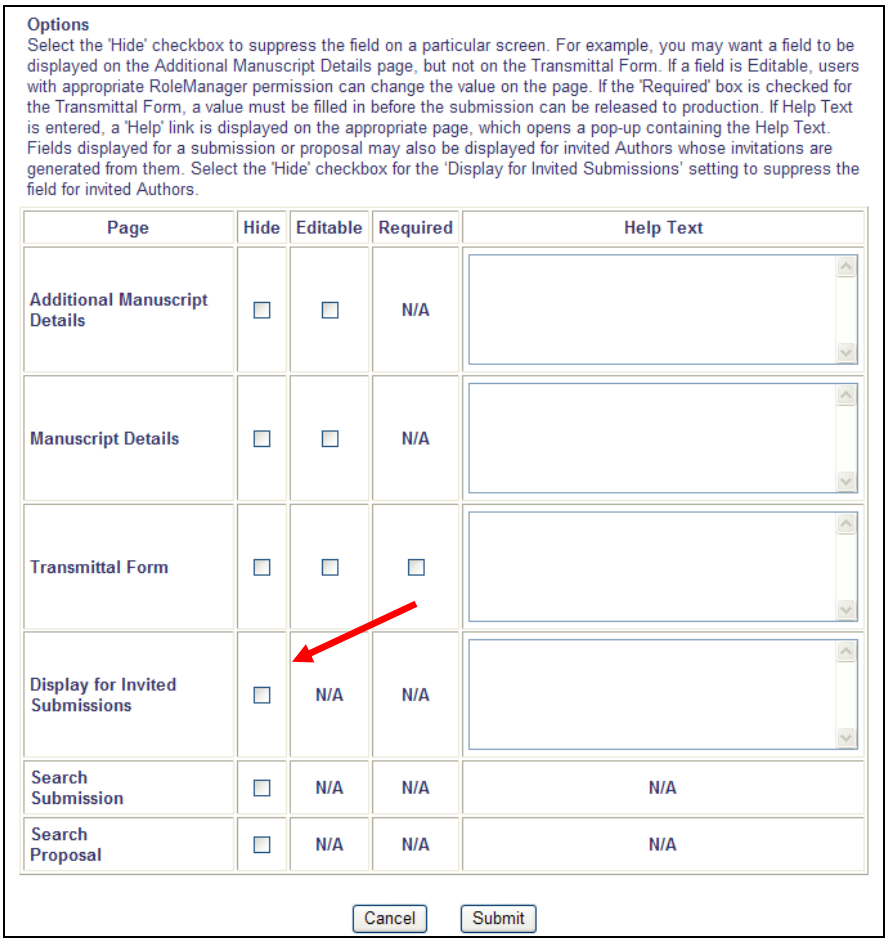

When an AMD is configured to display for Invited Submissions, the field is first displayed on the Proposal or submission for which a Commentary is being solicited ('Parent Submission') for Editors to enter information they wish to pass to the Authors they are inviting. In our example, the Editor would enter the title of the book they are inviting Authors to review.

Additional Manuscript Details pop-up for Proposal:

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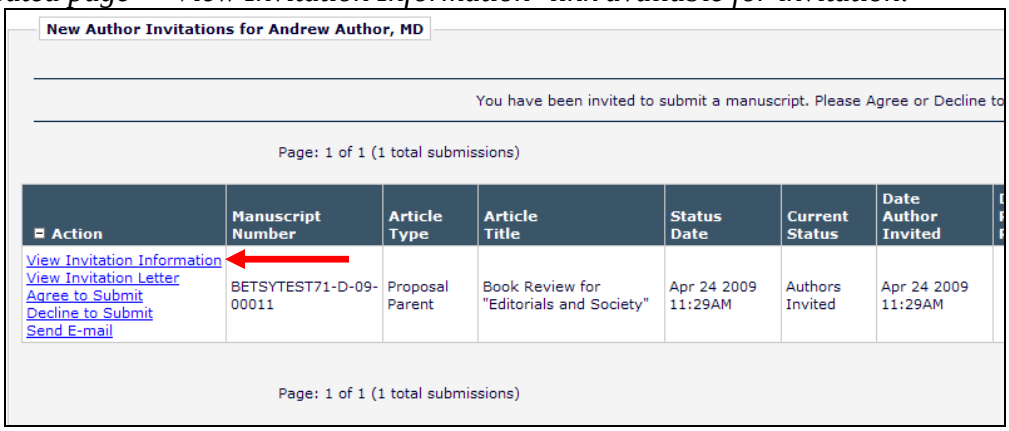
The information entered in this field will be available for Invited Authors to review. When there is data available in these fields, Invited Authors will have a new View Invitation Information link available in the following folders:

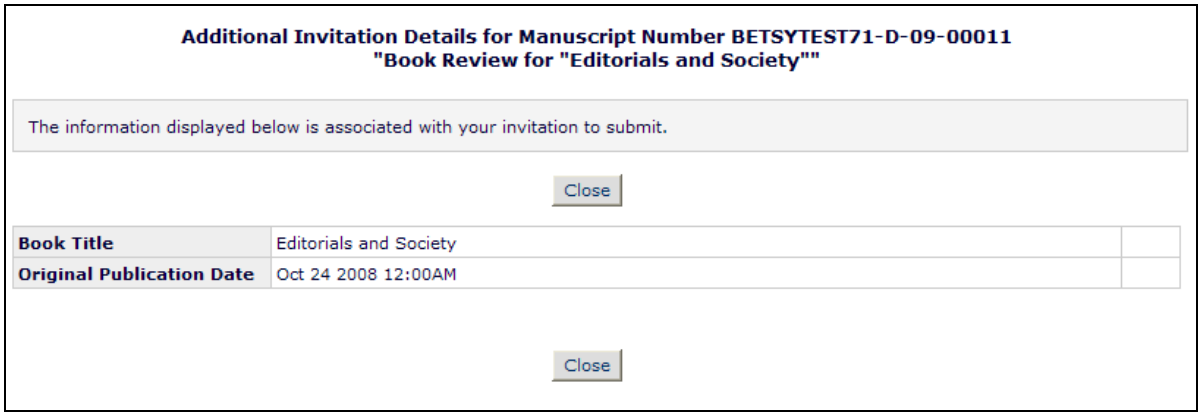
- My New Invitations
- My Accepted Invitations
- Incomplete Submissions
- Submissions Waiting for Approval

Truncated page – 'View Invitation Information' link available for invitation:



Clicking the new link will display the new *Additional Invitation Details* page to the Invited Author. The Author will see any AMDs that are configured to be displayed on Invited Submissions, and for which the Editor has entered data. If any fields are left blank by the Editor, they will not display to the Author on this page. These fields are not editable by the Author; they are for information only.

Publications may also add instructional text for the *Additional Invitation Details* page to provide Invited Authors with additional information about what they see on this pop-up. The instructional text is customizable by the publications system administrator.



TO CONFIGURE:

In PolicyManager, navigate to the *Add/Edit Additional Manuscript Detail Fields* page in

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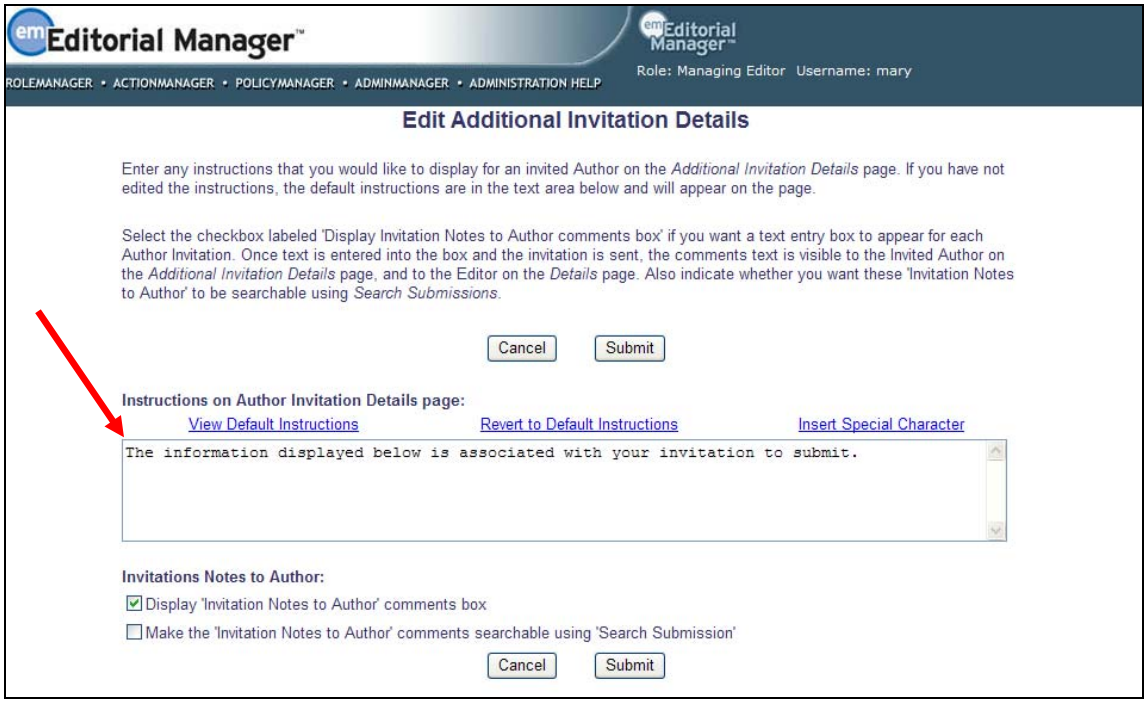
the ‘Additional Data Policies’ section. Edit an existing field, or Add a new field. Select whether you would like this AMD to be displayed for all Article Types, or only a selected sub-set of Article Types. Next, select whether you would like this AMD to be displayed for Invited Submissions.

Also in PolicyManager, navigate to the ‘Edit Additional Invitation Details’ page to customize the instructions that will display on the *Additional Invitation Details* page viewed by the Invited Author.



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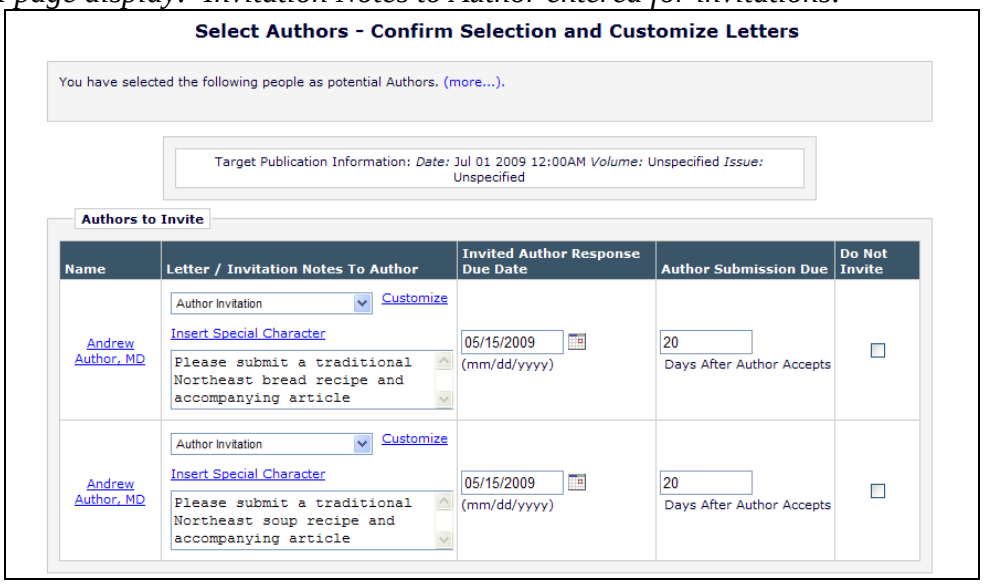
‘Invitation Notes to Author’ now available

When an Author is invited to submit in response to a proposal, or to contribute a commentary on an existing submission, invitation-related notes may now be entered by the inviting Editor at the time of Author invitation. A new %INVITATION_NOTES_TO_AUTHOR% merge field allows these notes to be included in author invitation letters and author reminder letters.

Example:
A publication is doing a special issue on a topic (for example, Northeast Cooking), inviting Authors to write submissions for the special issue. The publication may also want to invite one Author for multiple submissions. A publication may then use the Proposal feature to create a Proposal of the special issue, and send Author Invitations to solicit submissions.

At the time the Author Invitations are created, Editors can use the ‘Invitations Notes to Author’ field to ask the Author to write on a specific topic for the issue, or to differentiate between multiple invitations and their topics: Invitation A is for Bread Recipes, and Invitation B is for Soup Recipes.

Partial page display: Invitation Notes to Author entered for invitations:



Once the invitations have been sent, the ‘Invitation Notes to Author’ information can be viewed by Editors or the Invited Author.

The notes are accessible to Editors:

- On the *Details* page, in the Invited Authors section, with other invitation-related information.
- On the *Details* page for an invited submission, if there were invitation notes associated with the invitation the Author received.
- As a selection criterion on Search Submissions, for an invited submission, if

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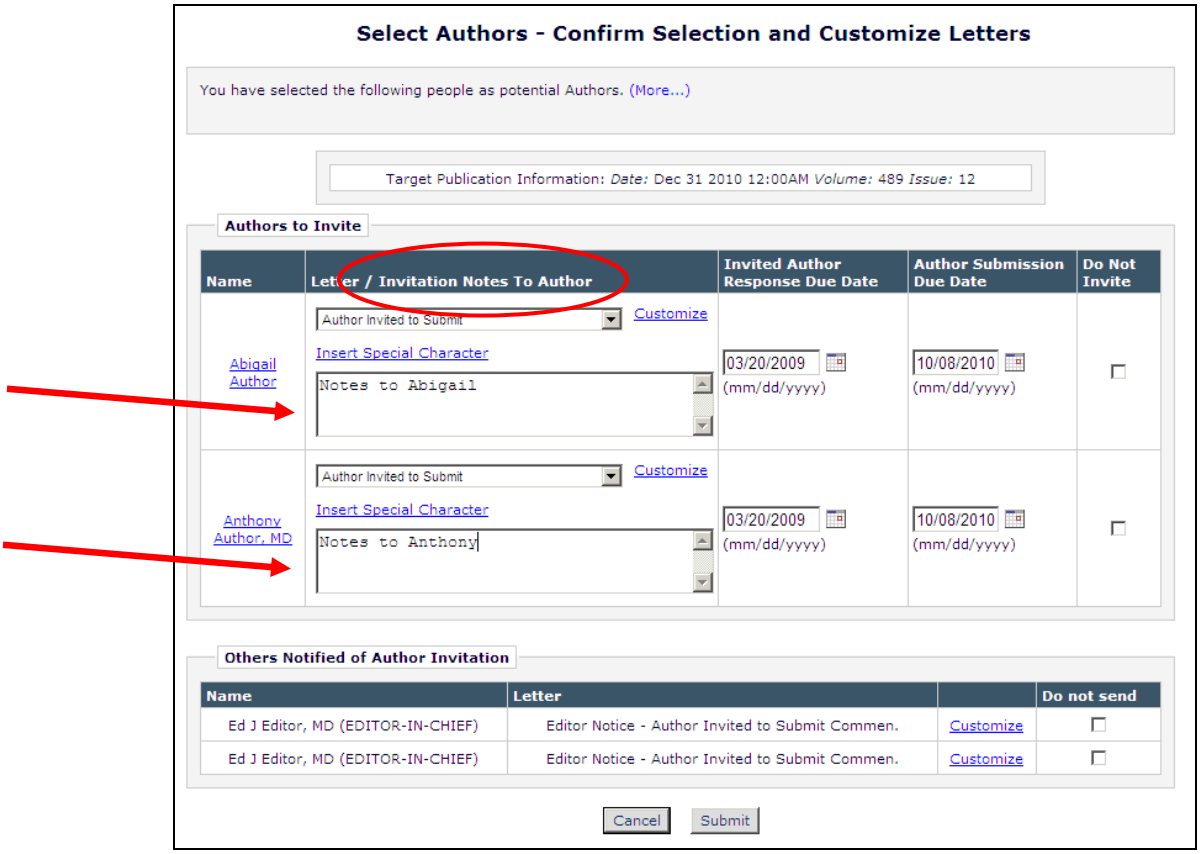
there were invitation notes associated with the invitation the Author received.

- As a selection criterion on the Proposal Pipeline Report (for proposal-related invitations and invited submissions)

These notes are visible to Invited Authors:

- On the new 'Additional Invitation Details' page, accessed via the new View Invitation Information link. This page may also include Additional Manuscript Details associated with the proposal or the submission for which a commentary was requested.

Workflow:
Invitation Notes to the Author are initially entered on the *Select Authors - Confirm Selection and Customize Letters* page (during the Author invitation process):



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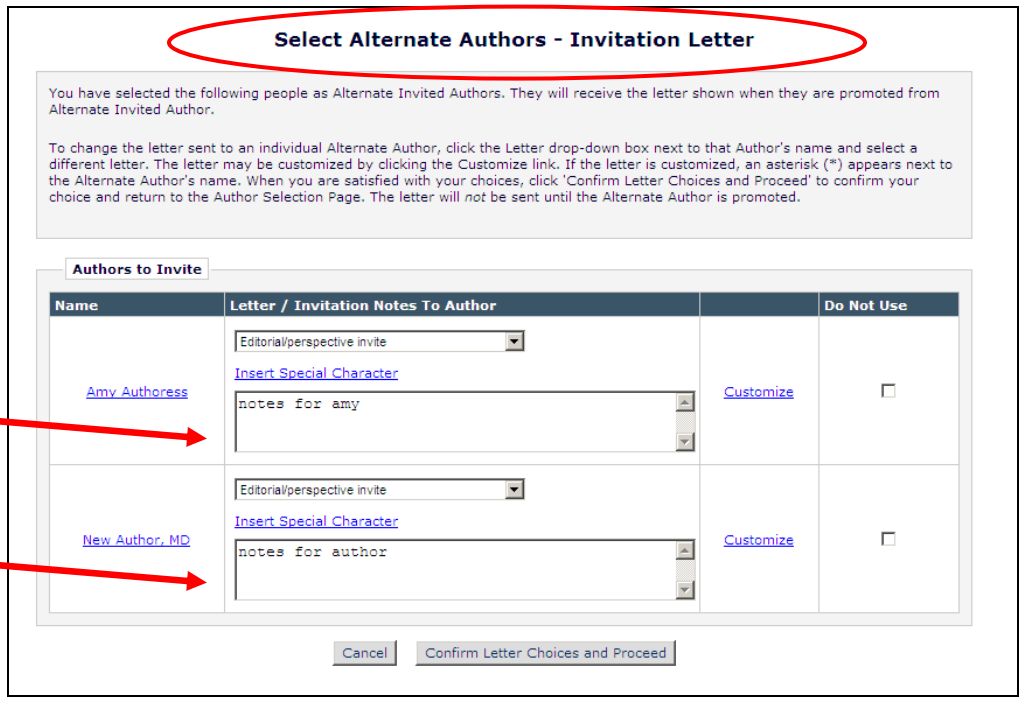
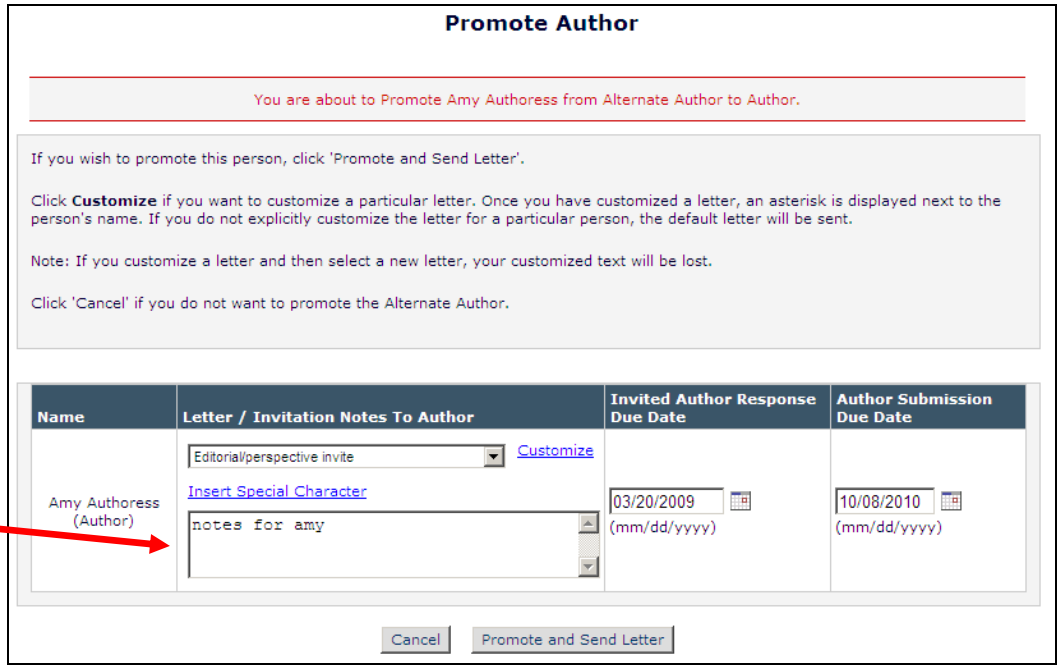
Invitation Notes can also be stored for Alternate Authors:



Upon manual promotion of Alternate Authors, these notes can be entered or edited before promotion. NOTE: If automatic promotion occurs, they are not editable but will be pulled into the promotion letter if the %INVITATION_NOTES_TO_AUTHOR% merge field is used in the letter.



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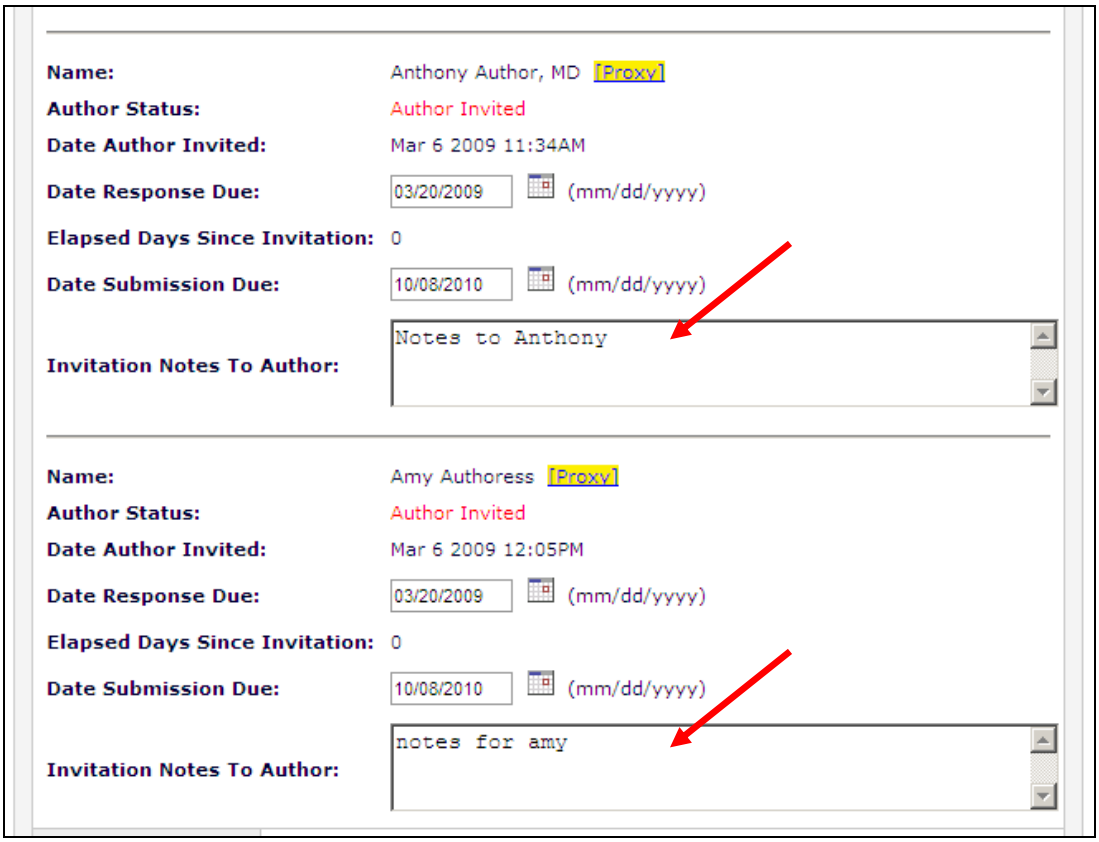
The *Details* page for the Proposal or submission for which a commentary was solicited shows any Author invitation notes that were entered. The notes are not editable on the *Details* page.



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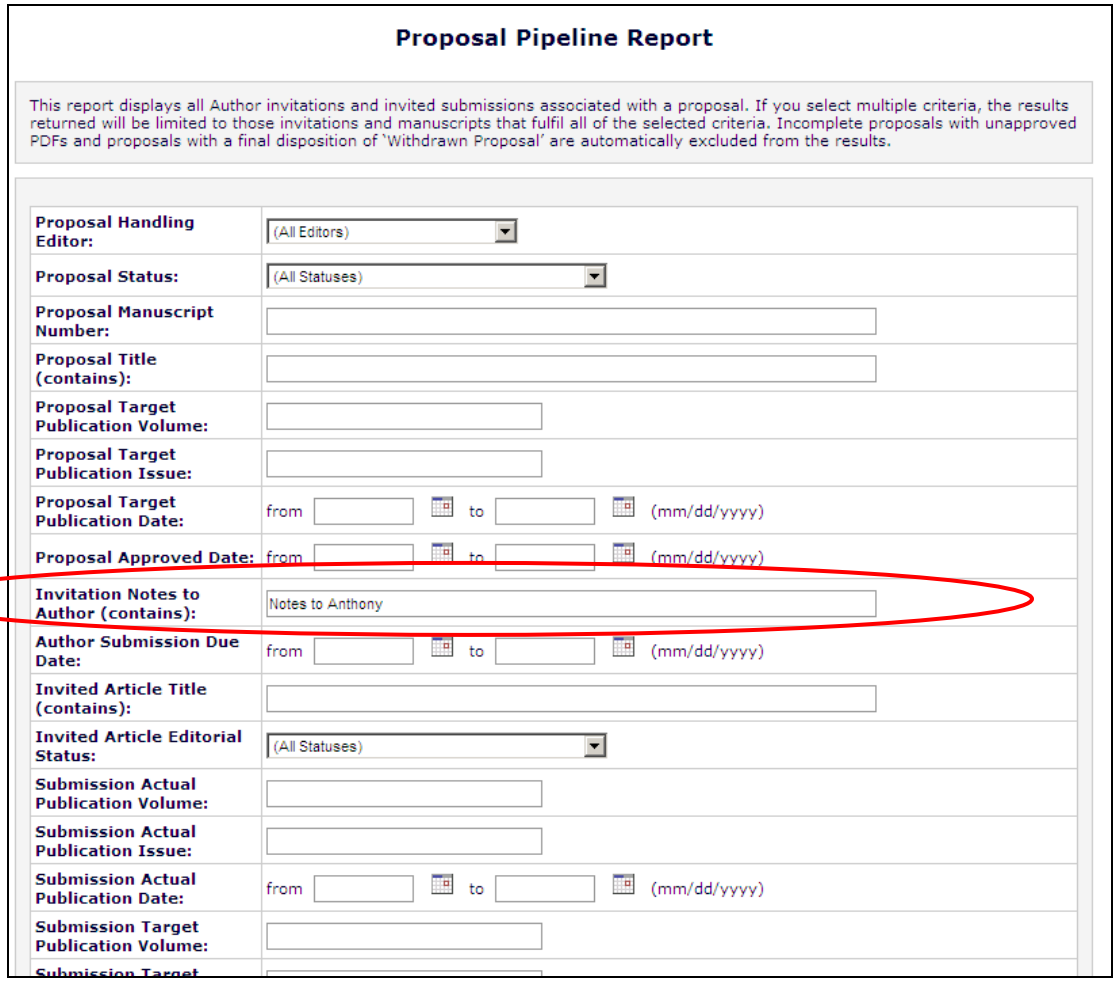
The Proposal Pipeline Report selection criteria page allows searching on the Invitation Notes to Author. It will return any invitations or invited submissions with invitation notes containing the search term:



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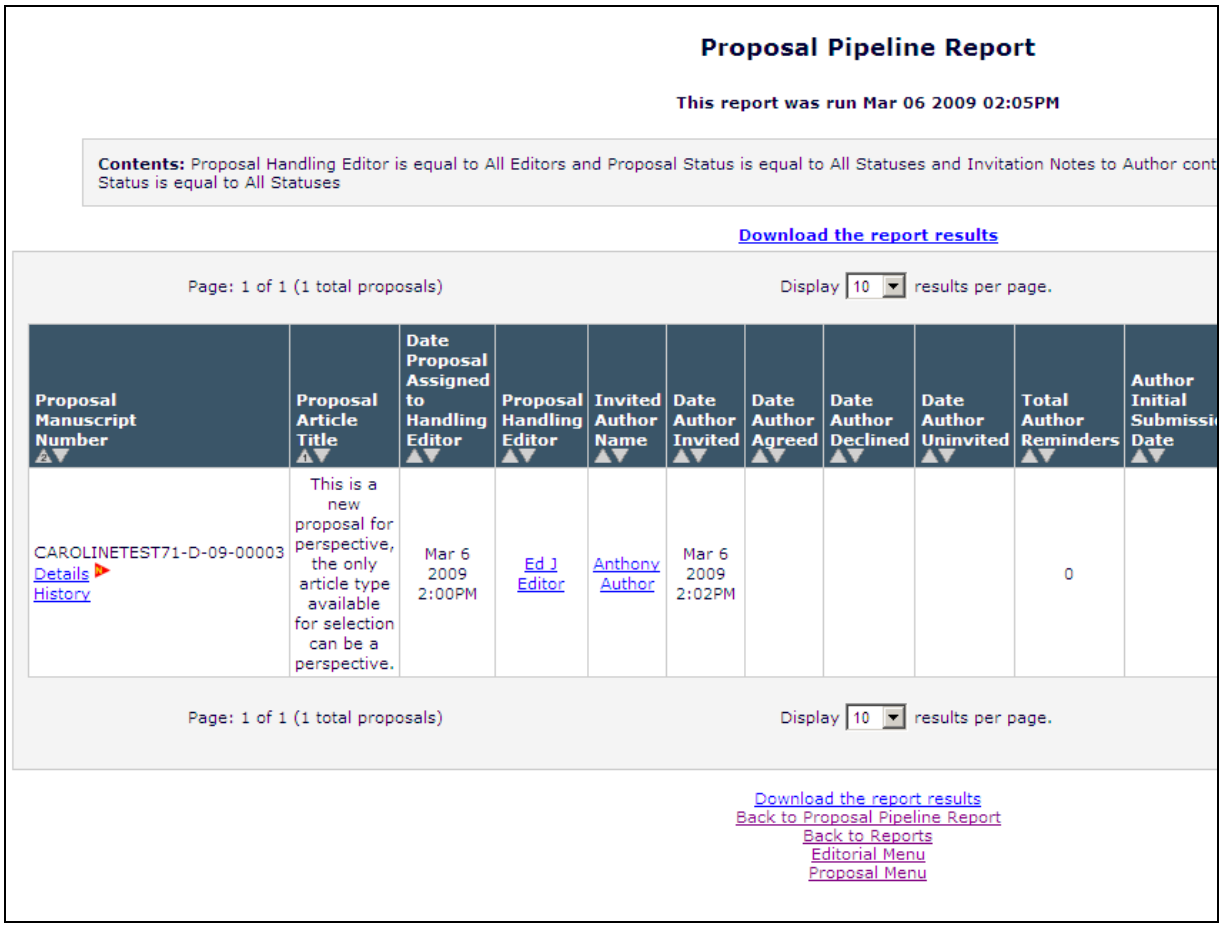
The Proposal Pipeline Report results contain all proposal/invitation combinations that have an invitation note containing the text entered into the search box. The invitation note itself is not displayed in the results, however it can be viewed by clicking the Details action link.



Proposal Pipeline Report

This report was run Mar 06 2009 02:05PM

Contents: Proposal Handling Editor is equal to All Editors and Proposal Status is equal to All Statuses and Invitation Notes to Author cont
Status is equal to All Statuses

Download the report results

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

Proposal Manuscript Number	Proposal Article Title	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 Submissi Date
CAROLINETEST71-D-09-00003 Details History	This is a new proposal for perspective, the only article type available for selection can be a perspective.	Mar 6 2009 2:00PM	Ed J Editor	Anthony Author	Mar 6 2009 2:02PM				0	

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

Download the report results
Back to Proposal Pipeline Report
Back to Reports
Editorial Menu
Proposal Menu

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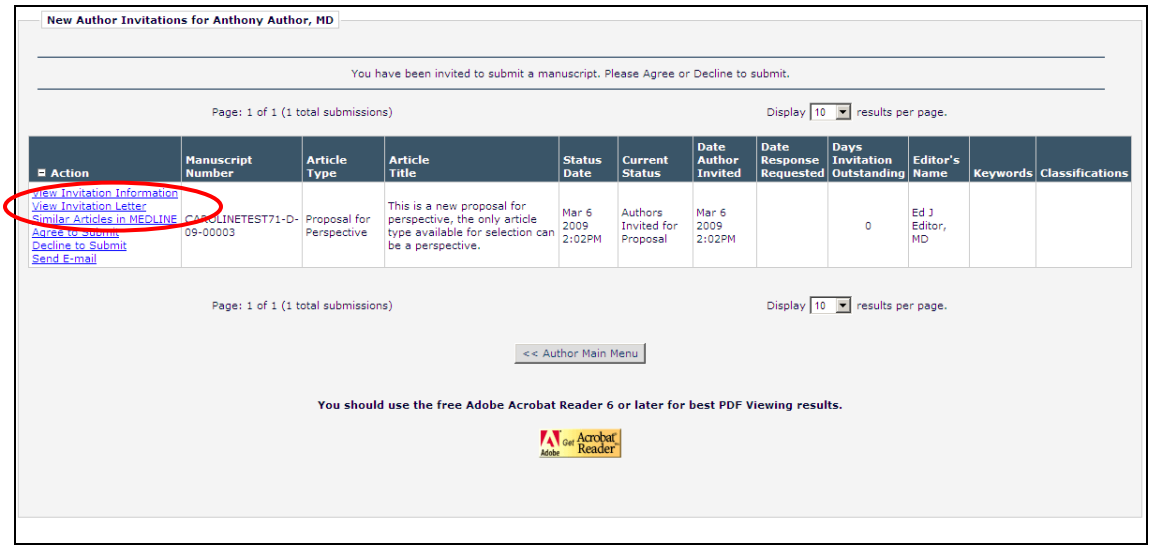
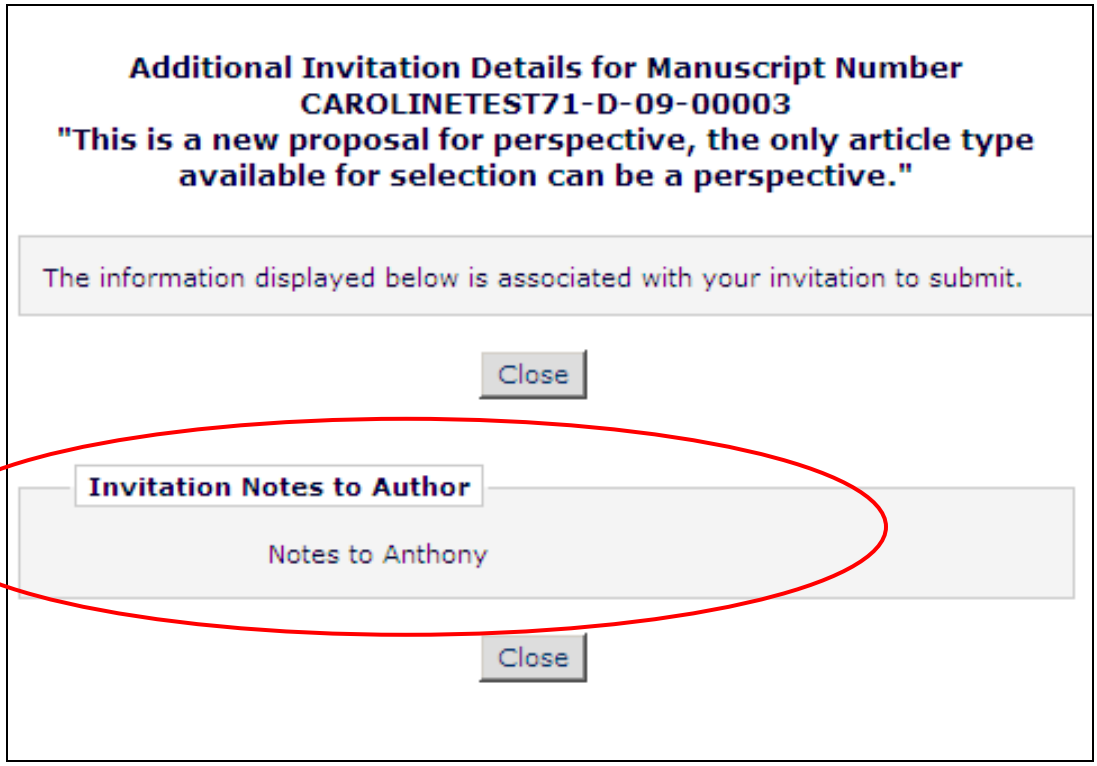
The Author sees a View Invitation Information link in the *My New Invitations* folder on the Author Main Menu. This link is also displayed in the Author's *My Accepted Invitations* folder, and in the *Incomplete Submissions* and *Submissions Waiting for Author's Approval* folders:



Clicking this link brings up a pop-up window displaying the Invitation Notes entered by the Editor at the time of invitation:



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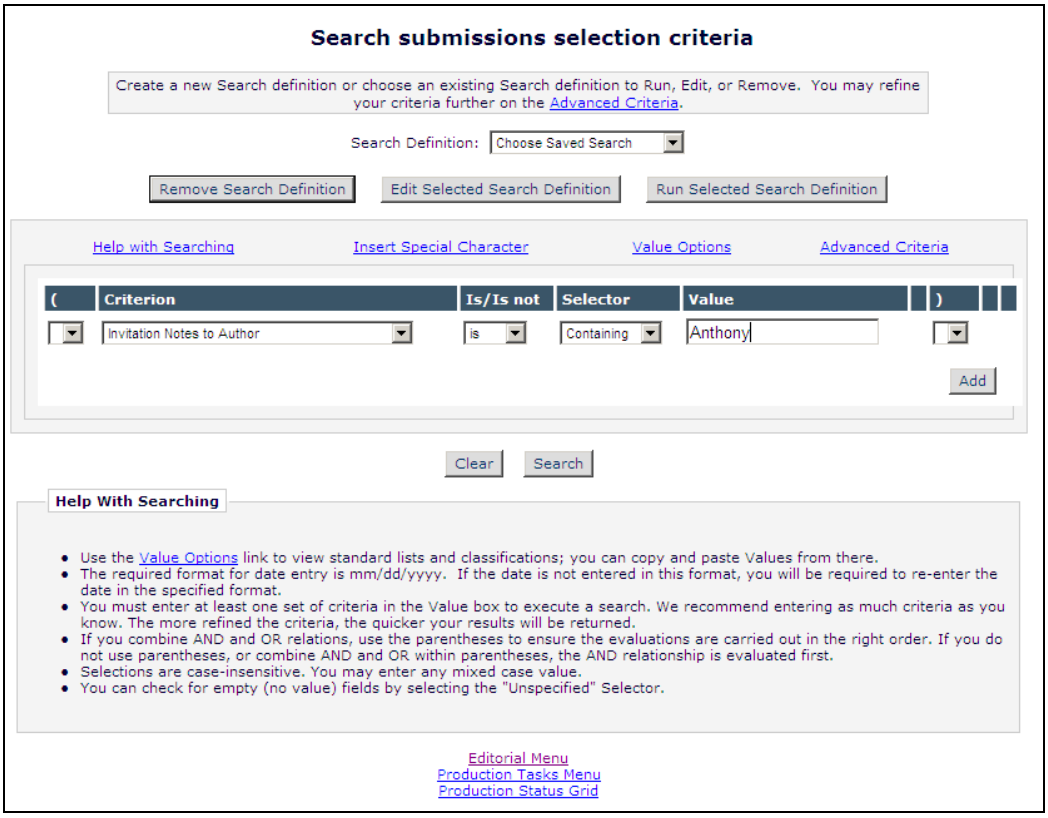
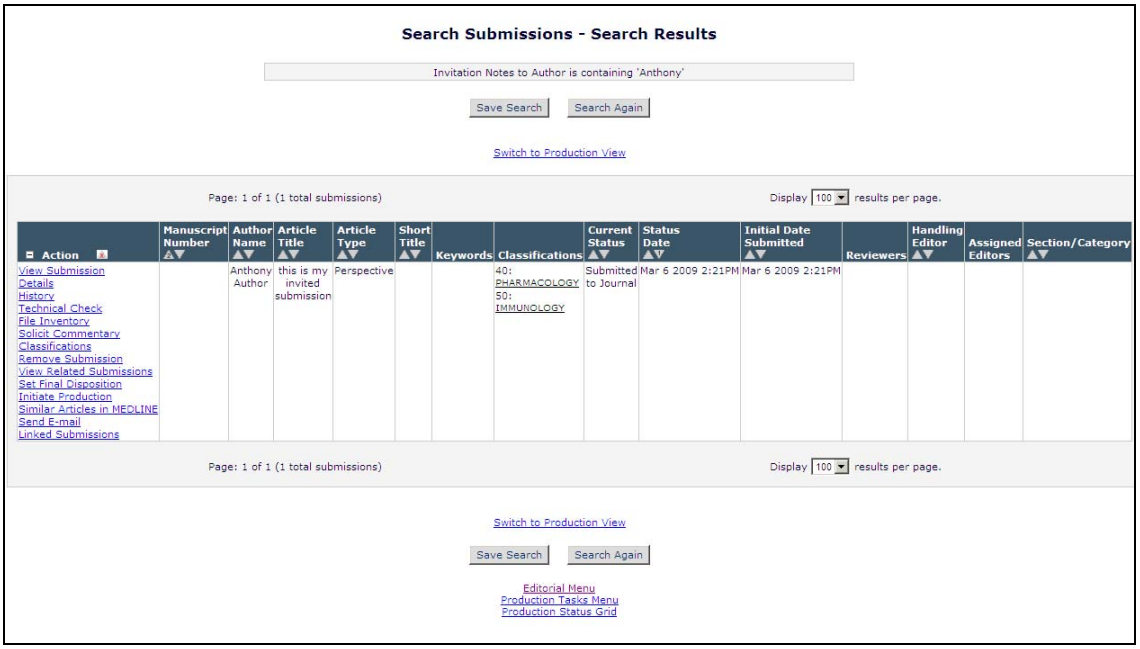
Once an invited submission has been received by the publication, the Invitation Notes related to the original invitation for the submission are searchable using *Search Submissions.* The Invitation Notes themselves do not appear in the results:





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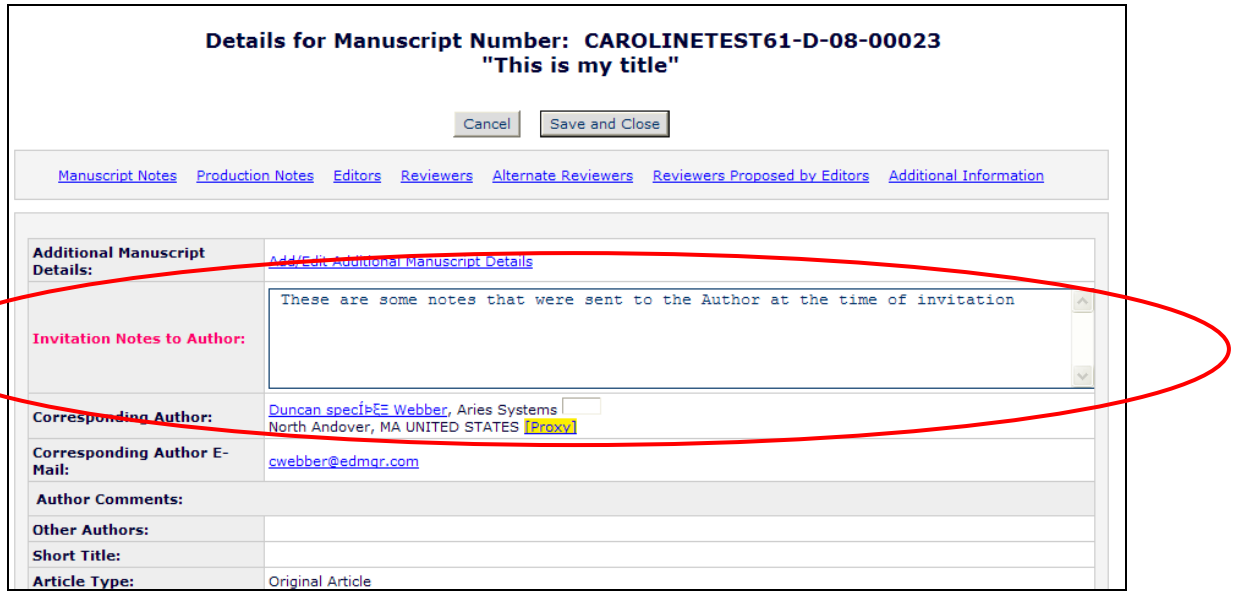
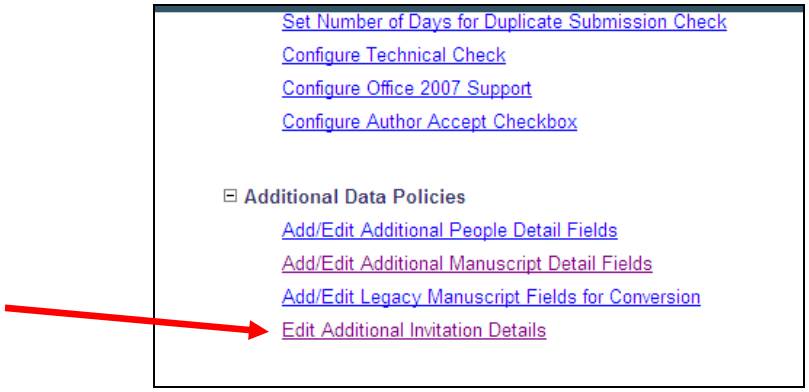
The Invitation Notes also appear on the Details page of the invited submission.



TO CONFIGURE:
In PolicyManager:
For Editors with permission, there is a new Edit Additional Invitation Details link in the 'Additional Data Policies' section of PolicyManager.



Clicking this link brings up the new *Edit Additional Information Details* page. This page allows the user to:

1. Enter instructions that will appear to the Author on the new *Author Invitation Details* page.
2. Select the checkbox "Display 'Invitation Notes to Author' comments box' – if selected, an 'Invitation Notes to Author' text entry box will appear for each Author during the author invitation process, on the *Select Authors – Confirm Selection and Customize Letters* page.
3. Select the checkbox "Make the 'Invitation Notes to Author' comments searchable using 'Search Submissions'" – if selected, the invitation notes associated with an

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invited submission are searchable using *Search Submissions.* Note that a result is returned only for an invited submission that has been received by the editorial office. A result is not returned for an outstanding invitation that is not yet associated with an invited submission.

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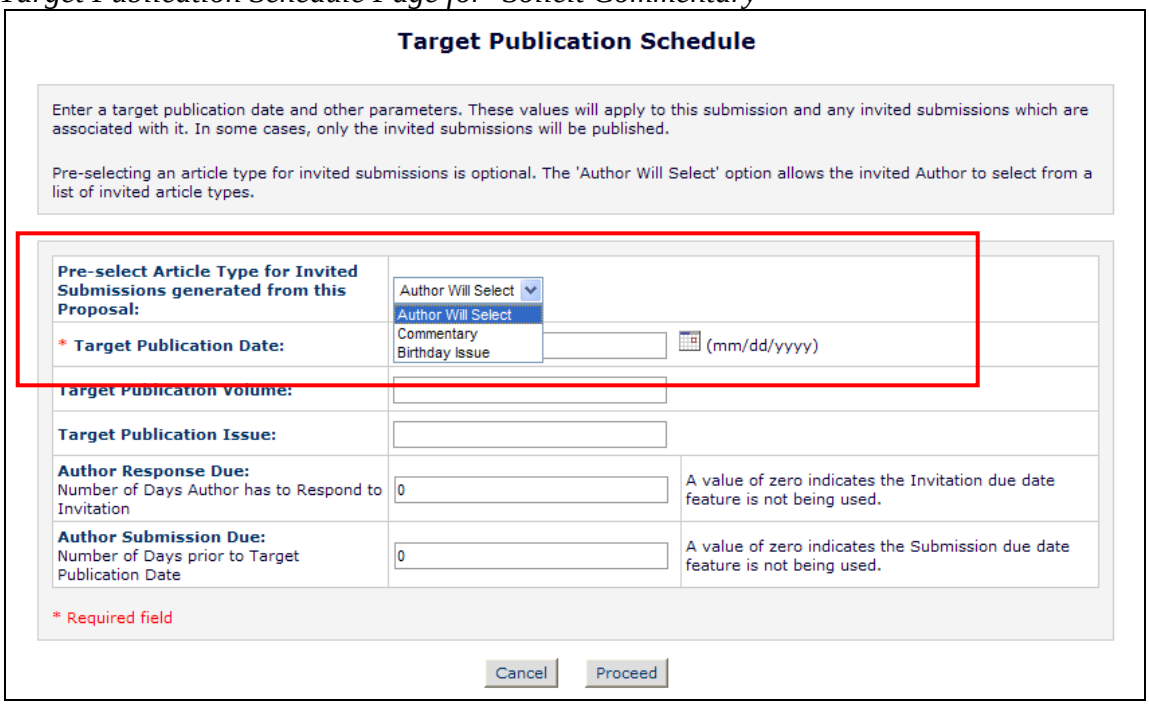
Pre-Select Invited Article Type

In EM v7.0, when an Author submits an invited submission, they are required to select the Article Type appropriate to their submission from those configured as 'Invited'. This sometimes creates complications when the Author does not know which Article Type to select. New in v7.1, Editors may pre-select the Article Type when inviting Authors through the 'Solicit Commentary' or 'Initiate Proposal' features.

When soliciting a Commentary, the Editor will be given the opportunity to select the Article Type for the invited submission from a drop-down menu when entering the Target Publication Schedule information. The drop-down menu will show all non-hidden Article Types (from the 'Regular' and 'Conference Submission' Article Type Families) that are configured as 'Invited'. The Editor may also choose to let the Author select the Article Type by selecting the "Author Will Select" option in the menu.

Target Publication Schedule Page for 'Solicit Commentary'



The same option displays when an Editor initiates a Proposal.

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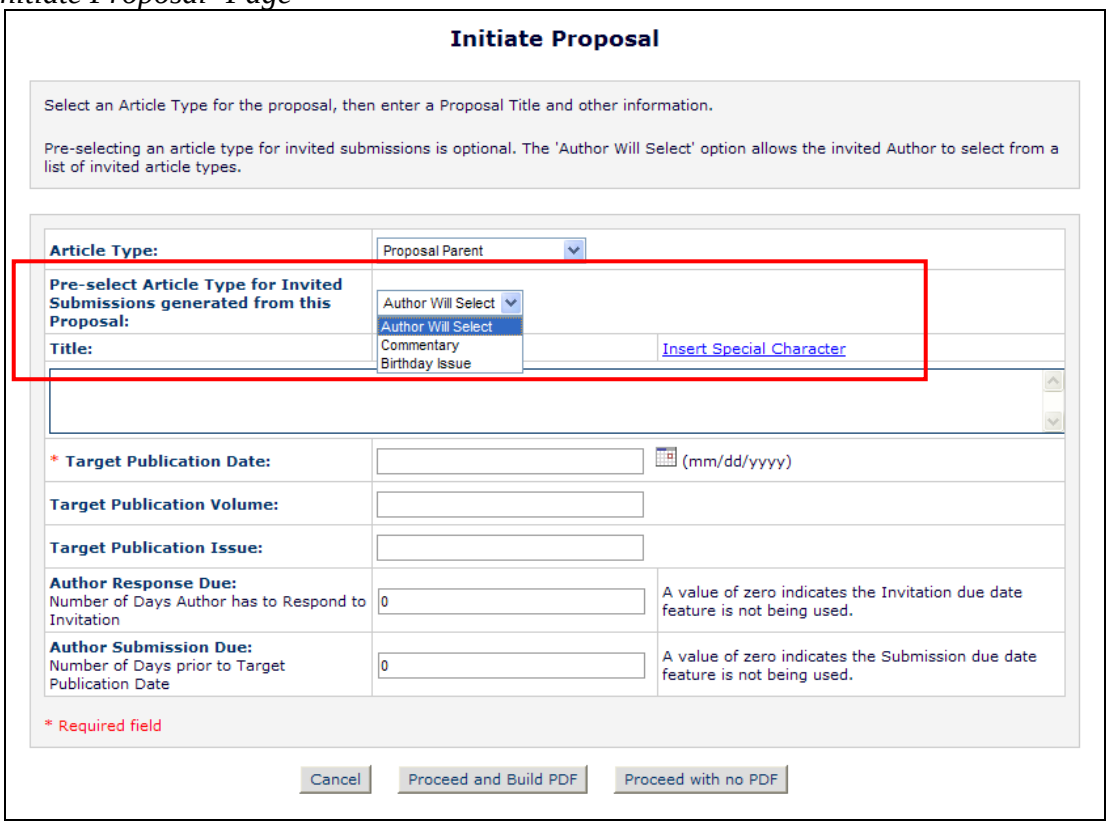
'Initiate Proposal' Page



If the Editor has pre-selected an Article Type, then when the Author submits the invited submission, the 'Select Article Type' step is suppressed, but the pre-selected Article Type is set behind the scenes. All steps configured for the pre-selected Article Type will display for the Author to complete. The 'Select Article Type' step will also be suppressed for all subsequent edits to or revisions of that submission.

NOTE: When the Article Type is pre-selected for an invited submission, the Article Type for that invited submission can never be changed. Make sure you are pre-selecting the correct Article Type for this invited submission.

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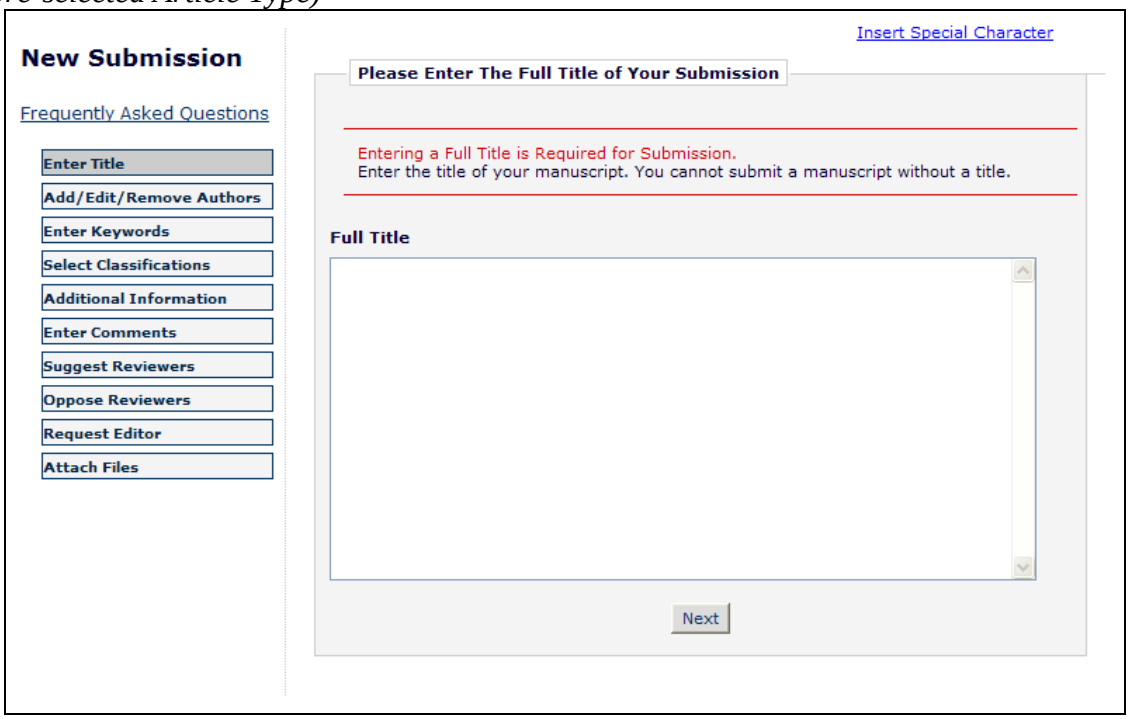
Submission Interface for Invited Submission with a Pre-selected Article Type (first step –Select Article Type– is suppressed, other steps appear as configured for the pre-selected Article Type)



TO CONFIGURE:
No configuration required, although it should be noted that only non-hidden Article Types from the Regular and Conference Submission Article Type Families which are configured as 'Invited' will be available for selection in the drop-down menu.

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Author Invitation Statistics

New in v7.1, Editors can see Author Invitation statistics when they are searching for Authors to invite for Commentaries or Proposals. Similar to the statistics displayed for Reviewers, the current and historical information regarding Author Invitations is displayed on the *Search for Author Results* and *Search for Alternate Author Results* pages, including the number of Author Invitations accepted by the Author, number of Author Invitations declined, and number of outstanding Author Invitations for the Author.

The following statistics associated with Author Invitations are now shown in the 'Author Statistics' column, in addition to the 'Agreed and Awaiting Submission' field already displayed:

1. Invited Submissions Received – Displays the total number of invited submissions the Author has submitted to date.
2. Un-invited Before Agreeing – Displays the total number of invited submissions where the invited Author was un-invited **before** having agreed to submit.
3. Un-invited After Agreeing – Displays the total number of invited submissions where the invited Author was un-invited **after** having agreed to submit.
4. Last Invited Submission Agreed – Displays the latest date that the Author agreed to submit an invited submission.
5. Last Invited Submission Received – Displays the latest date that the Author submitted an invited submission.
6. Last Invited Submission Declined – Displays the latest date that the Author declined an invitation.
7. Avg Days to Submit – Displays the average number of days that the Author has taken to submit the agreed submissions after accepting their Author Invitations, not including those that were subsequently un-invited.

Please note that the removal of a submission by either an Editor or the Author does not change the above statistics. The submission is still counted in these statistics.

The following statistics associated with Author Invitations are added to the 'Invitation Statistics' column under the 'Outstanding Invitations' field already displayed:

1. Agreed – Displays the total number of invitations where the Author agreed to submit, including those that have already been submitted and those where the author was subsequently un-invited.
2. Declined – Displays the total number of invitations where the Author declined to submit.
3. Un-invited – Displays the total number of times the Author was un-invited by an Editor **before responding to an invitation.**

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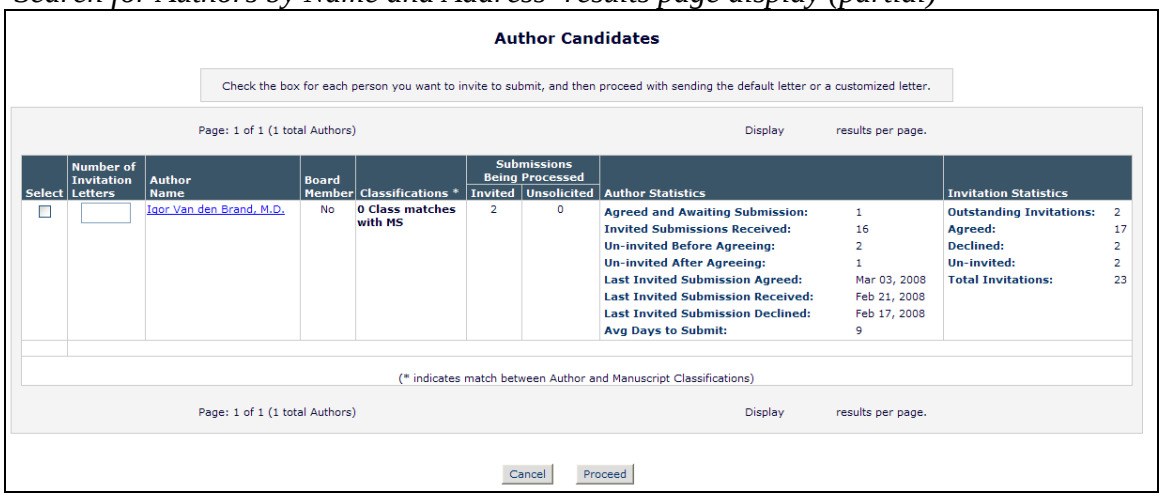
4. Total Invitations – Displays the total number of Author Invitations sent to the Author. This total is equal to the sum of the four values above it in the 'Invitation Statistics' column.

'Search for Authors by Name and Address' results page display (partial)



Author Candidates

Check the box for each person you want to invite to submit, and then proceed with sending the default letter or a customized letter.

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

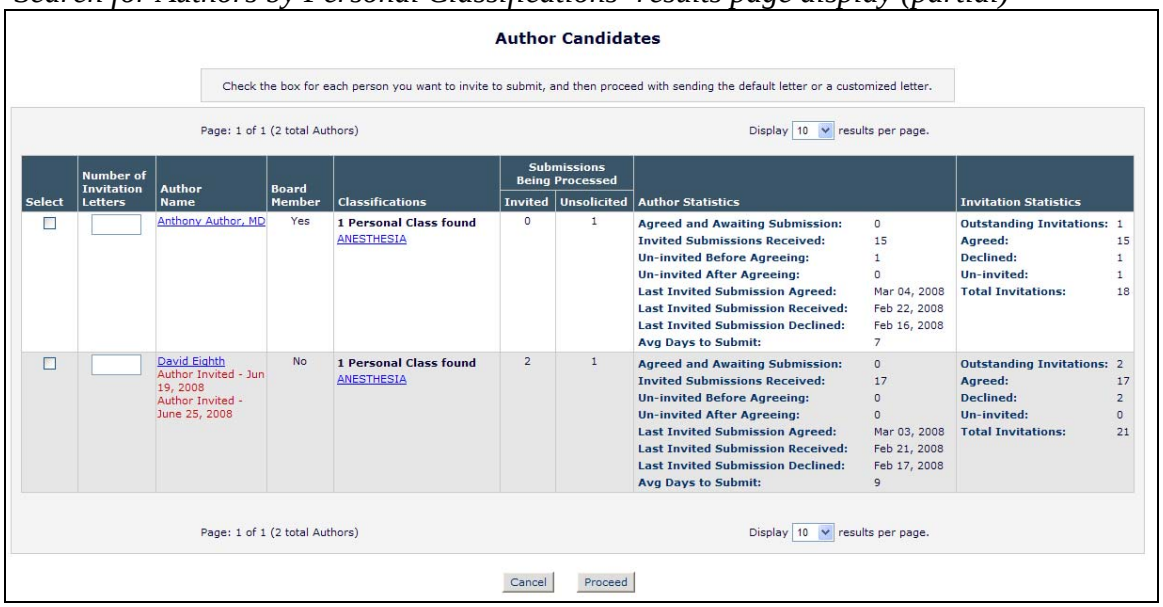
Select	Number of Invitation Letters	Author Name	Board Member	Classifications *	Submissions Being Processed: Invited	Submissions Being Processed: Unsolicited	Author Statistics		Invitation Statistics	
☐		Igor Van den Brand, M.D.	No	**0 Class matches with MS**	2	0	**Agreed and Awaiting Submission:**	1	**Outstanding Invitations:**	2
							Invited Submissions Received:	16	**Agreed:**	17
							Un-invited Before Agreeing:	2	**Declined:**	2
							Un-invited After Agreeing:	1	**Un-invited:**	2
							Last Invited Submission Agreed:	Mar 03, 2008	**Total Invitations:**	23
							Last Invited Submission Received:	Feb 21, 2008		
							Last Invited Submission Declined:	Feb 17, 2008		
							Avg Days to Submit:	9		

(* indicates match between Author and Manuscript Classifications)

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

Cancel Proceed

'Search for Authors by Personal Classifications' results page display (partial)



Author Candidates

Check the box for each person you want to invite to submit, and then proceed with sending the default letter or a customized letter.

Page: 1 of 1 (2 total Authors) Display 10 results per page.

Select	Number of Invitation Letters	Author Name	Board Member	Classifications	Submissions Being Processed: Invited	Submissions Being Processed: Unsolicited	Author Statistics		Invitation Statistics	
☐		Anthony Author, MD	Yes	**1 Personal Class found** ANESTHESIA	0	1	**Agreed and Awaiting Submission:**	0	**Outstanding Invitations:**	1
							Invited Submissions Received:	15	**Agreed:**	15
							Un-invited Before Agreeing:	1	**Declined:**	1
							Un-invited After Agreeing:	0	**Un-invited:**	1
							Last Invited Submission Agreed:	Mar 04, 2008	**Total Invitations:**	18
							Last Invited Submission Received:	Feb 22, 2008		
							Last Invited Submission Declined:	Feb 16, 2008		
							Avg Days to Submit:	7		
☐		David Eighth Author Invited - Jun 19, 2008 Author Invited - June 25, 2008	No	**1 Personal Class found** ANESTHESIA	2	1	**Agreed and Awaiting Submission:**	0	**Outstanding Invitations:**	2
							Invited Submissions Received:	17	**Agreed:**	17
							Un-invited Before Agreeing:	0	**Declined:**	2
							Un-invited After Agreeing:	0	**Un-invited:**	0
							Last Invited Submission Agreed:	Mar 03, 2008	**Total Invitations:**	21
							Last Invited Submission Received:	Feb 21, 2008		
							Last Invited Submission Declined:	Feb 17, 2008		
							Avg Days to Submit:	9		

Page: 1 of 1 (2 total Authors) Display 10 results per page.

Cancel Proceed

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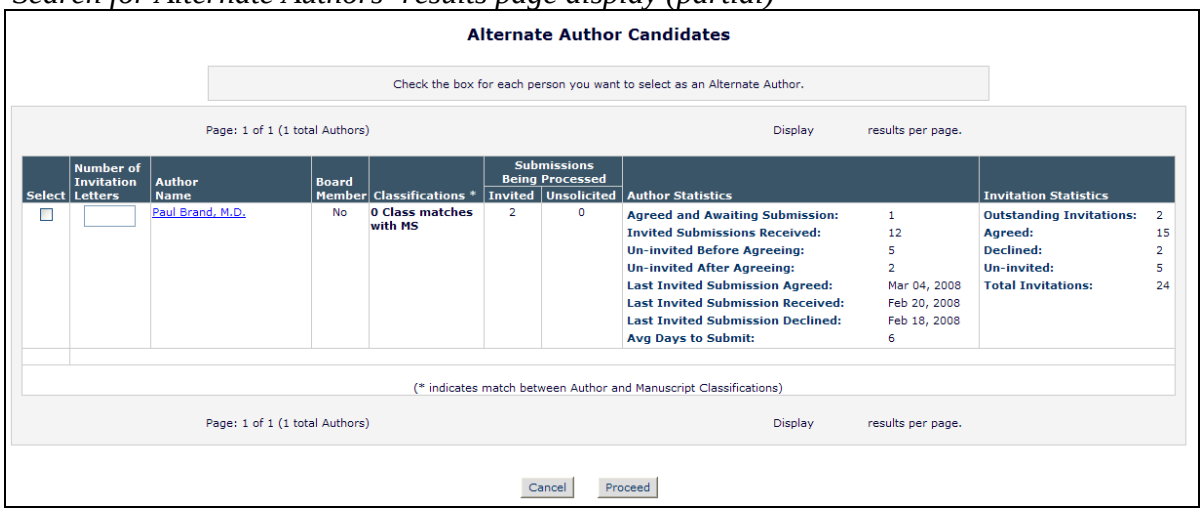
'Search for Alternate Authors' results page display (partial)



Alternate Author Candidates

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

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

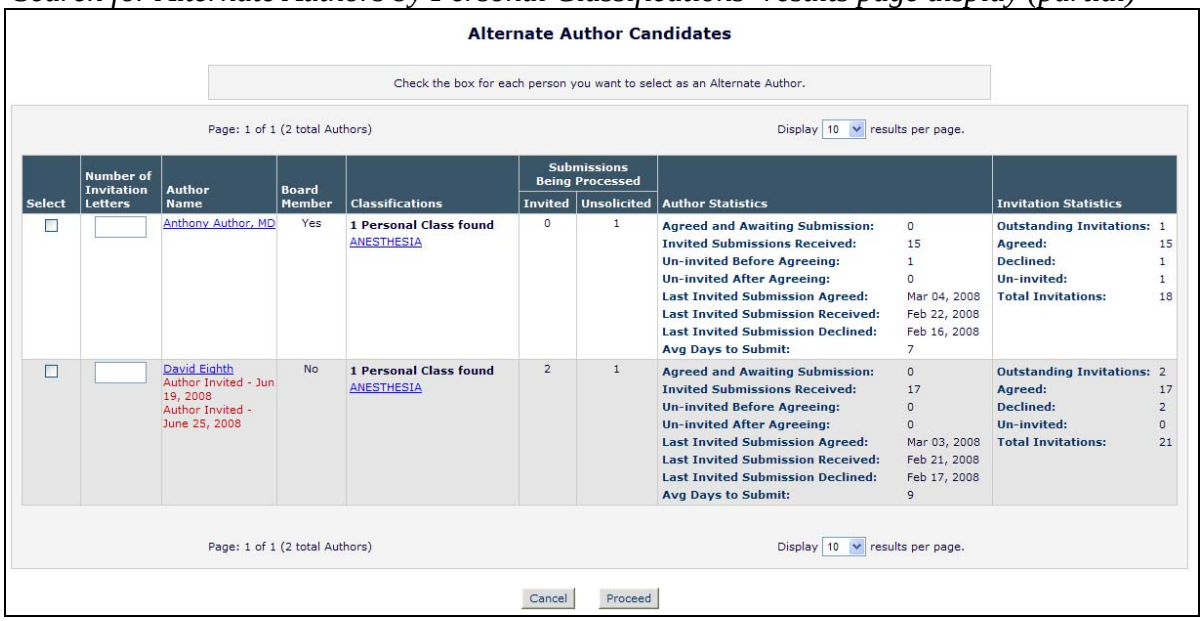
Select	Number of Invitation Letters	Author Name	Board Member	Classifications *	Submissions Being Processed: Invited	Submissions Being Processed: Unsolicited	Author Statistics		Invitation Statistics	
☐		Paul Brand, M.D.	No	0 Class matches with MS	2	0	Agreed and Awaiting Submission:	1	Outstanding Invitations:	2
							Invited Submissions Received:	12	Agreed:	15
							Un-invited Before Agreeing:	5	Declined:	2
							Un-invited After Agreeing:	2	Un-invited:	5
							Last Invited Submission Agreed:	Mar 04, 2008	Total Invitations:	24
							Last Invited Submission Received:	Feb 20, 2008		
							Last Invited Submission Declined:	Feb 18, 2008		
							Avg Days to Submit:	6		

(* indicates match between Author and Manuscript Classifications)

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

Cancel Proceed

'Search for Alternate Authors by Personal Classifications' results page display (partial)



Alternate Author Candidates

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

Page: 1 of 1 (2 total Authors) Display 10 results per page.

Select	Number of Invitation Letters	Author Name	Board Member	Classifications	Submissions Being Processed: Invited	Submissions Being Processed: Unsolicited	Author Statistics		Invitation Statistics	
☐		Anthony Author, MD	Yes	1 Personal Class found ANESTHESIA	0	1	Agreed and Awaiting Submission:	0	Outstanding Invitations:	1
							Invited Submissions Received:	15	Agreed:	15
							Un-invited Before Agreeing:	1	Declined:	1
							Un-invited After Agreeing:	0	Un-invited:	1
							Last Invited Submission Agreed:	Mar 04, 2008	Total Invitations:	18
							Last Invited Submission Received:	Feb 22, 2008		
							Last Invited Submission Declined:	Feb 16, 2008		
							Avg Days to Submit:	7		
☐		David Eighth Author Invited - Jun 19, 2008 Author Invited - June 25, 2008	No	1 Personal Class found ANESTHESIA	2	1	Agreed and Awaiting Submission:	0	Outstanding Invitations:	2
							Invited Submissions Received:	17	Agreed:	17
							Un-invited Before Agreeing:	0	Declined:	2
							Un-invited After Agreeing:	0	Un-invited:	0
							Last Invited Submission Agreed:	Mar 03, 2008	Total Invitations:	21
							Last Invited Submission Received:	Feb 21, 2008		
							Last Invited Submission Declined:	Feb 17, 2008		
							Avg Days to Submit:	9		

Page: 1 of 1 (2 total Authors) Display 10 results per page.

Cancel Proceed

From any of the above pages (and many other pages in Editorial Manager), an Editor can also access the *People Information* page for a potential Author by clicking the Name link associated with candidates in the results set. Four new sections displaying Author Invitation Statistics now appear on the *People Information* page (when there are statistics available): a 'Current Author Invitation Statistics' section, a 'Historical Author Invitation Statistics' section, a 'Historical Author Invitation Performance Summary' section, and a 'Historical Author Invitation Averages' section. NOTE: The location of these new sections on the *People Information* page may change based on the page from which it was accessed.

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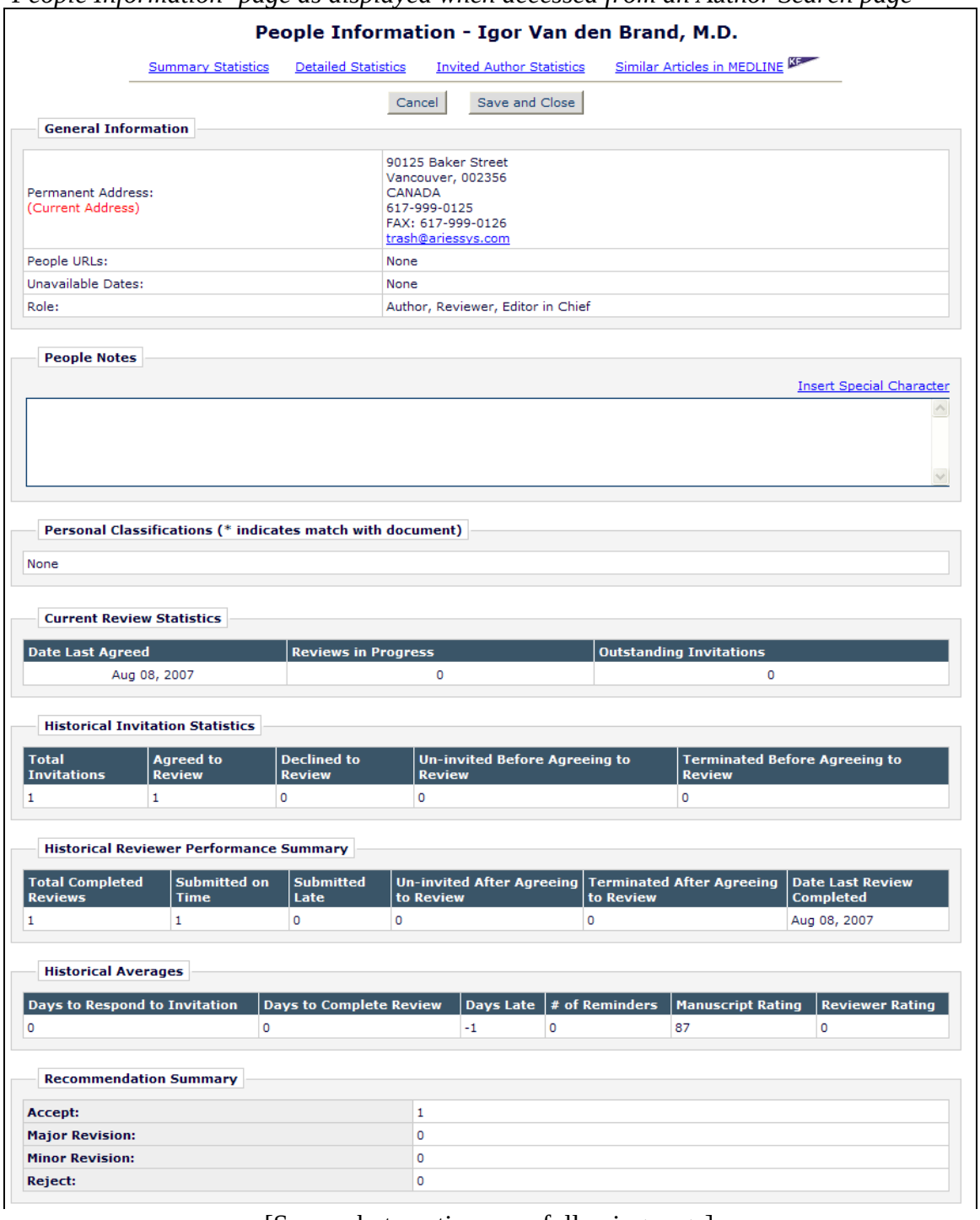
'People Information' page as displayed when accessed from an Author Search page



People Information - Igor Van den Brand, M.D.

Summary Statistics | Detailed Statistics | Invited Author Statistics | Similar Articles in MEDLINE

Cancel | Save and Close

General Information

Permanent Address: (Current Address)	90125 Baker Street Vancouver, 002356 CANADA 617-999-0125 FAX: 617-999-0126 trash@ariessys.com
People URLs:	None
Unavailable Dates:	None
Role:	Author, Reviewer, Editor in Chief

People Notes

Insert Special Character

Personal Classifications (* indicates match with document)

None

Current Review Statistics

Date Last Agreed	Reviews in Progress	Outstanding Invitations
Aug 08, 2007	0	0

Historical Invitation Statistics

Total Invitations	Agreed to Review	Declined to Review	Un-invited Before Agreeing to Review	Terminated Before Agreeing to Review
1	1	0	0	0

Historical Reviewer Performance Summary

Total Completed Reviews	Submitted on Time	Submitted Late	Un-invited After Agreeing to Review	Terminated After Agreeing to Review	Date Last Review Completed
1	1	0	0	0	Aug 08, 2007

Historical Averages

Days to Respond to Invitation	Days to Complete Review	Days Late	# of Reminders	Manuscript Rating	Reviewer Rating
0	0	-1	0	87	0

Recommendation Summary

Accept:	1
Major Revision:	0
Minor Revision:	0
Reject:	0

[Screenshot continues on following page]

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Completed Reviews

MS Number	Date Invited	Date Agreed	Date Completed	Days Late	# of Reminders	Recommendation	MS Rating	Reviewer Rating	Action
JOURNAL-7	Aug 08, 2007	Aug 08, 2007	Aug 08, 2007	-1	0	Accept	87	0	View Submission Details History

Current Editor Assignments

MS Number	Date Editor Assigned	Elapsed Days	Status	Action
JOURNAL-0511	Jan 26, 2008	5	With Editor	View Submission Details History
JOURNAL-0515	Jan 26, 2008	5	With Editor	View Submission Details History
JOURNAL-0516	Jan 26, 2008	5	With Editor	View Submission Details History

Open Production Task Assignments

MS Number	Production Task	Date Task Assigned	Production Task Status	Date Task Due	Days Until Due	Action
JOURNAL-0550	Composition	Feb 07, 2008	Open	Feb 07, 2008	Due Today	View Submission Production Details History

Current Author Invitation Statistics

Date Last Agreed	Invited Submissions in Progress	Outstanding Invitations
Mar 30, 2008	1	2

Historical Author Invitation Statistics

Total Author Invitations	Agreed to Submit	Declined to Submit	Un-invited Before Agreeing to Submit
23	17	2	2

Historical Author Invitation Performance Summary

Total Invited Submissions Received	Submitted On Time	Submitted Late	Un-invited After Agreeing to Submit	Date Last Invited Submission Received
16	9	7	1	May 30, 2008

Historical Author Invitation Averages

Days to Respond to Author Invitation	Days to Submit Invited Submission	Days Late	# of Author Reminders
5	9	6	1

Authored Submissions

MS Number	Title	Initial Date Submitted	Status	Status Date	Decision	Final Disposition	Action
	Editorial - by the Editor-in-Chief	Feb 06, 2008	Submitted to Journal	Feb 06, 2008			View Submission Details History

Cancel Save and Close

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The ‘Current Author Invitation Statistics’ section displays the following information:

1. Date Last Agreed - Displays the latest date that the user has agreed to any Author Invitation.
2. Invited Submissions in Progress - Displays the current number of submissions where the user has agreed to submit based on Author Invitations, but has yet to submit the invited submission to the editorial office and has not been un-invited. This field matches the ‘Agreed and Awaiting Submission’ field on the *Author Search Results* pages.
3. Outstanding Invitations - Displays the current number of Author Invitations that the user has not yet responded to. This field matches the ‘Outstanding Invitations’ field on the *Author Search Results* pages.

The ‘Historical Author Invitation Statistics’ section, displayed beneath the ‘Current Author Invitation Statistics’ section, shows the following historical information related to Author Invitations:

1. Total Author Invitations - Displays the total number of Author Invitations sent to the user. This field matches the ‘Total Invitations’ field on the *Author Search Results* pages.
2. Agreed to Submit - Displays the total number of invitations where the Author has agreed to submit, including those that have already been submitted and those where the author was subsequently un-invited. This field matches the ‘Agreed’ field on the *Author Search Results* pages.
3. Declined to Submit - Displays the total number of invitations where the Author has declined to submit. This field matches the ‘Declined’ field on the *Author Search Results* pages.
4. Un-invited Before Agreeing to Submit - Displays the total number of times that the user was un-invited by an Editor before responding to an Author Invitation. This field matches the ‘Un-invited’ field on the *Author Search Results* pages.

The ‘Historical Author Invitation Performance Summary’ section, displayed beneath the ‘Historical Author Invitation Statistics’ section, displays the following performance summary information related to Author Invitations:

1. Total Invited Submissions Received - Displays the total number of invited submissions received by the Editorial Office from the user. This field matches the ‘Invited Submissions Received’ field on the *Author Search Results* pages.
2. Submitted On Time - Displays the total number of invited submissions submitted by the user before their Author Submission Due Date has elapsed. *NOTE: Invited submissions with no due date are also included in this count.*
3. Submitted Late - Displays the total number of invited submissions submitted by the user after their Author Submission Due Date had elapsed.

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4. Un-invited After Agreeing to Submit - Displays the total number of times that the user was un-invited by an Editor after agreeing to an Author Invitation.
5. Date Last Invited Submission Received - Displays the date that the user last submitted an invited submission. This field matches the 'Last Invited Submission Received' field added to the *Author Search Results* pages.

The 'Historical Author Invitation Averages' section, displayed beneath the 'Historical Author Invitation Performance Summary' section, displays the following averages calculated for Author Invitation statistics:

1. Days to Respond to Author Invitation - Displays the average number of days between the Author Invitation being sent and the Author clicking either the 'Agree to Submit' link or deep link or the 'Decline to Submit' link or deep link.
2. Days to Submit Invited Submission - Displays the average number of days that between the Author clicking the 'Agree to Submit' link or deep link and the Author approving the PDF for their invited submission. This field matches the 'Avg Days to Submit' field on the *Author Search Results* pages.
3. Days Late - Displays the average number of days past the Author Submission Due Date that the user has submitted any late invited submissions. NOTE: Only submissions which were submitted after their due date count toward this average.
4. # of Author Reminders - Displays the average number of Author reminder letters the user has received per Author Invitation.

TO CONFIGURE:
No configuration required. New sections will display automatically when Author Invitation statistics are available.

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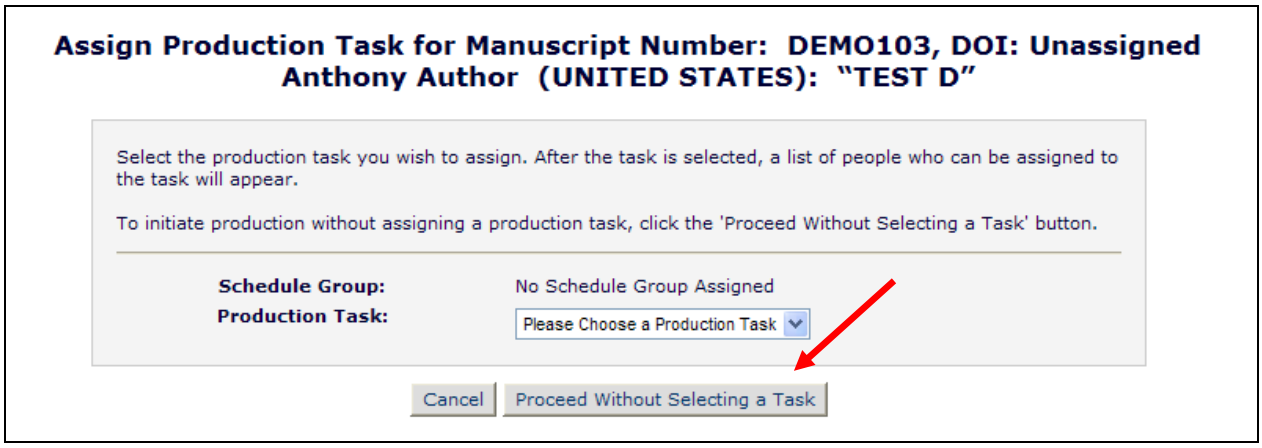
PRODUCTION TRACKING ENHANCEMENTS

Initiate Production without Assigning a Submission Production Task

In EM/PM v7.0, when initiating production on a submission, the user has the option of assigning the submission to a Schedule Group where they may or may not assign a Production Task immediately. If the user does not assign the submission to a Schedule Group, then they are navigated to the *Assign Production Task* page where they must assign a Production Task in order to complete the initiation of production.

New with v7.1, users are given the option of initiating production on a submission without having to assign the submission to schedule group or assigning a Submission Production Task. When a submission is not assigned to a Schedule Group, then the 'Assign Production Task' page now has a new 'Proceed Without Selecting a Task' button. Clicking the 'Proceed Without Selecting a Task' button moves the submission into production, and places the submission into the new 'Production Initiated – No Tasks Assigned' folder (see below for information on this new folder).



The addition of this functionality also allows publications to have Editor and Publisher roles that have the 'Initiate Production' permission enabled, but not the 'Assign Submission Production Task' permission enabled.

TO CONFIGURE:
No additional configuration necessary. This option is available for all Editor and Publisher roles with the 'Initiate Production' permission enabled.

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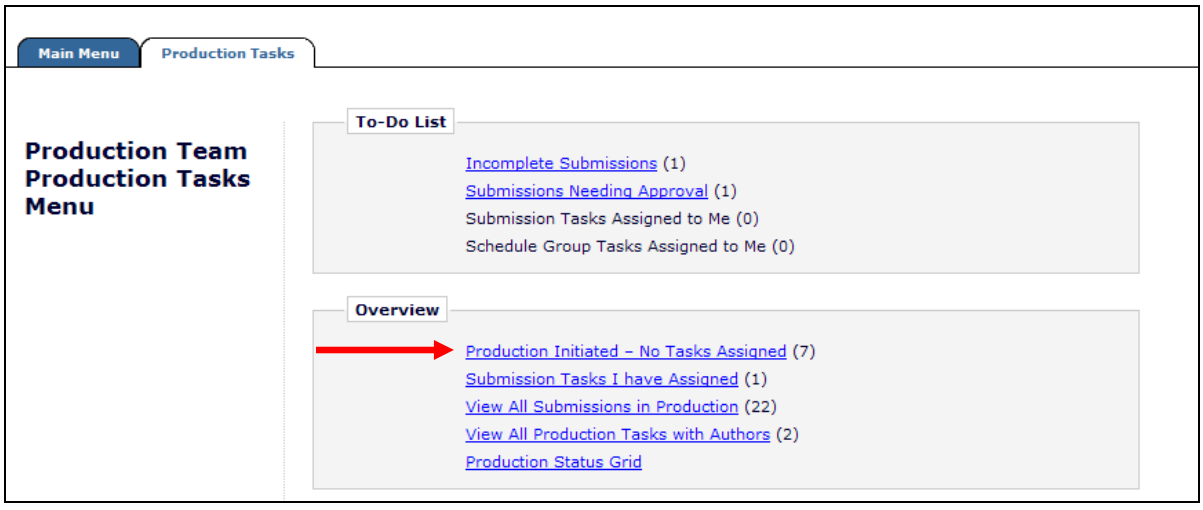
New 'Production Initiated – No Tasks Assigned' folder

A new folder link is available on the Production Tasks menu for Editors and Publishers called Production Initiated - No Tasks Assigned. This link is displayed in the 'Overview' section of the Production Tasks Menu.

Editor Production Tasks Menu

Publisher Production Tasks Menu



The new 'Production Initiated – No Tasks Assigned' folder displays submissions where production has been initiated but no tasks have yet been assigned (or if all tasks have been cancelled), and the submission is still actively in production (i.e., the End Production link has not been clicked or the Schedule Group to which the submission has been assigned is not closed). Contents may include submissions entered via the new

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‘Create Submission’ button in PM, or submissions entered in EM that have gone through the editorial process, and on which production has been initiated without an initial task being assigned. The folder contains Action Links allowing the user to assign a submission production task, view Details about the submission, or edit the submission.

NOTE: If there are no submissions in the folder, the folder name still displays as a label (not a link) with a (0) after the name.

TO CONFIGURE:
No configuration necessary. The new folder displays for all Editors and Publishers with the existing ‘Initiate Production’ permission enabled.

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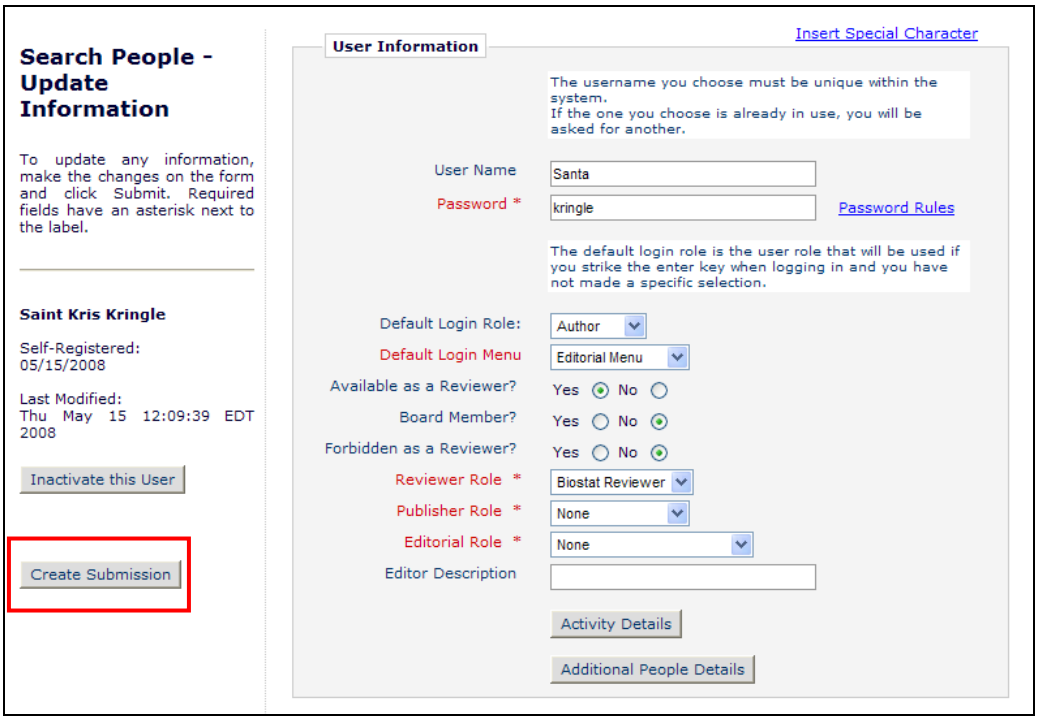
Input Submissions Directly Into Production Tracking

Some publications use the EM/PM system solely for production tracking, placing new submissions directly into production. To manually input the details of such a submission in v7.0, users need to log in as the Author of the submission and use the existing submission interface to submit a manuscript, then log in as an Editor (or Publisher) role to initiate production. V7.1 introduces a new method for entering a submission directly into Production Tracking.

A new Preprint Manager permission is created for Editors enabling them to enter a submission directly into Production by first searching for the Author record (from the Search People link on the Production Tasks menu), and then clicking a new 'Create Submission' button.



The Editor is then brought to a streamlined submission entry form, displaying the set of fields configured for the selected Article Type as well as date fields required by the system for creating the submission record. Editors are asked to enter the metadata for the submission, any Other Authors associated with the submission, and are given an opportunity to upload files for the submission. No PDF is created using this submission method.

NOTE: When a submission is created using this streamlined entry method, there is no PDF created for the submission at any point in the lifecycle of the submission. If Editors believe will be a need for a PDF at any point, they should proxy into EM/PM as the Author and enter the submission using that method.

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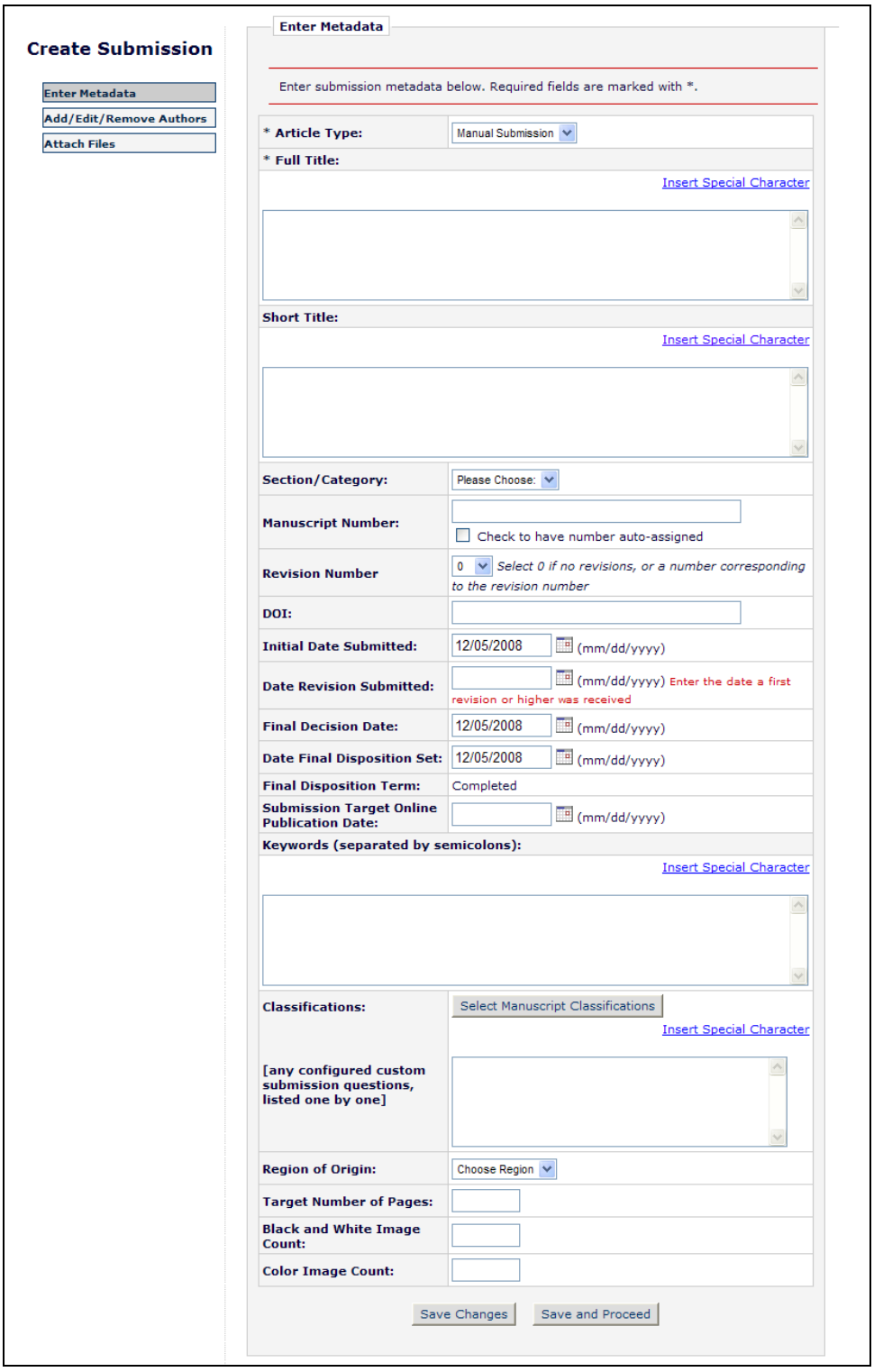

Submissions entered via this new interface are automatically placed into Production (Production is Initiated) upon creation, and are placed in the new 'Production Initiated – No Tasks Assigned' folder.

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NOTE: If your publication is configured to have an automatically generated DOI using the Manuscript Number, you must have a manuscript number entered (or automatically generated) before you navigate from the Create Submission/Enter Metadata page. The DOI field will not be editable once the record is created.

TO CONFIGURE:
A new RoleManager permission is available for Editor roles in the Preprint Manager section called 'Create Submission'. Enabling this permission allows Editors (with 'Search People' permission enabled) to search for the Author Record from the Production Tasks menu and create a new submission from that Author's record.

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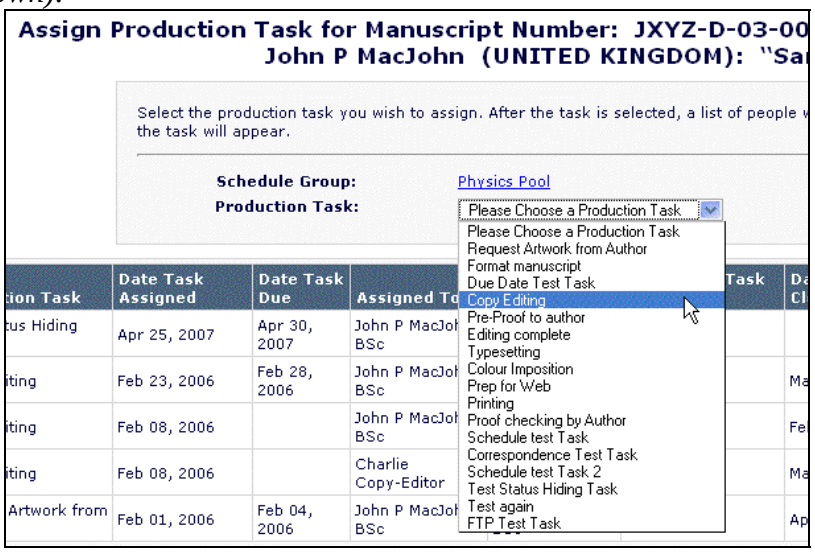
Submission Production Workflows

In v7.0 of EM/PM, system administrators are able to define a master set of Submission Production Tasks which are then available for use with all types of submissions. The user then decides which ones apply when assigning tasks for a submission. Although it is possible to limit the Production Tasks that a specific user can assign, it has not been possible to configure a subset of production tasks for use with a particular type of submission.

New in v7.1, system administrators can now define a subset of Submission Production Tasks. Each subset, called Submission Workflows, is given a unique name. Workflows may then be associated with specific Article Types, though you may also choose to not associate a Workflow with a given Article Type, allowing for all Submission Production Tasks to be available. Only one Workflow can be associated with each Article Type, though multiple Article Types may use the same Workflow. After applying a named Workflow to an Article Type, users will see the configured set of available Submission Production Tasks when assigning a task for a submission of that type, comprised of those tasks in the selected Workflow that are also available for the user to assign.

Without a Workflow linked to the Article Type (All configured Submission Production Tasks are shown):



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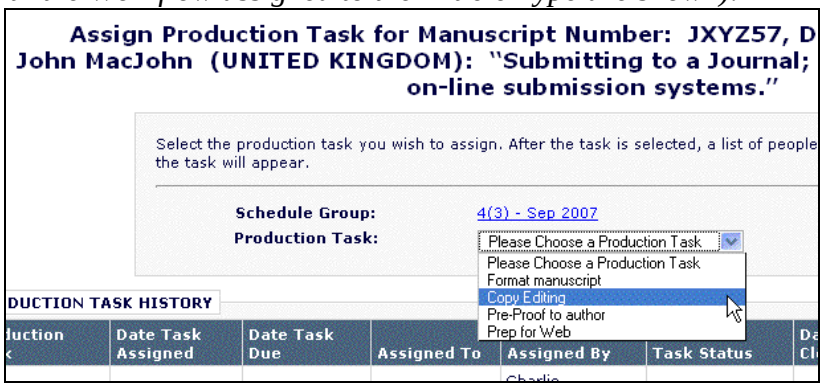
With a Workflow linked to the Article Type (only the Submission Production Tasks associated with the Workflow assigned to the Article Type are shown):



The Submission Workflow acts as an additional filter when assigning tasks, cutting down the full list of tasks that would otherwise be presented. You may still use the master list of tasks as a default for some Article Types, applying named Workflows only to those Article Types that need to follow a restricted set of tasks.

The Production Status Grid is modified to indicate which types of Submission Production Tasks are not applicable to each submission listed. As before, all Production Task Types that are configured with 'Show Task in Production Status Grid' appear here, but now any task type that is either Hidden, or not in the Workflow linked to the Article Type for a particular submission, will appear with darker background shading:

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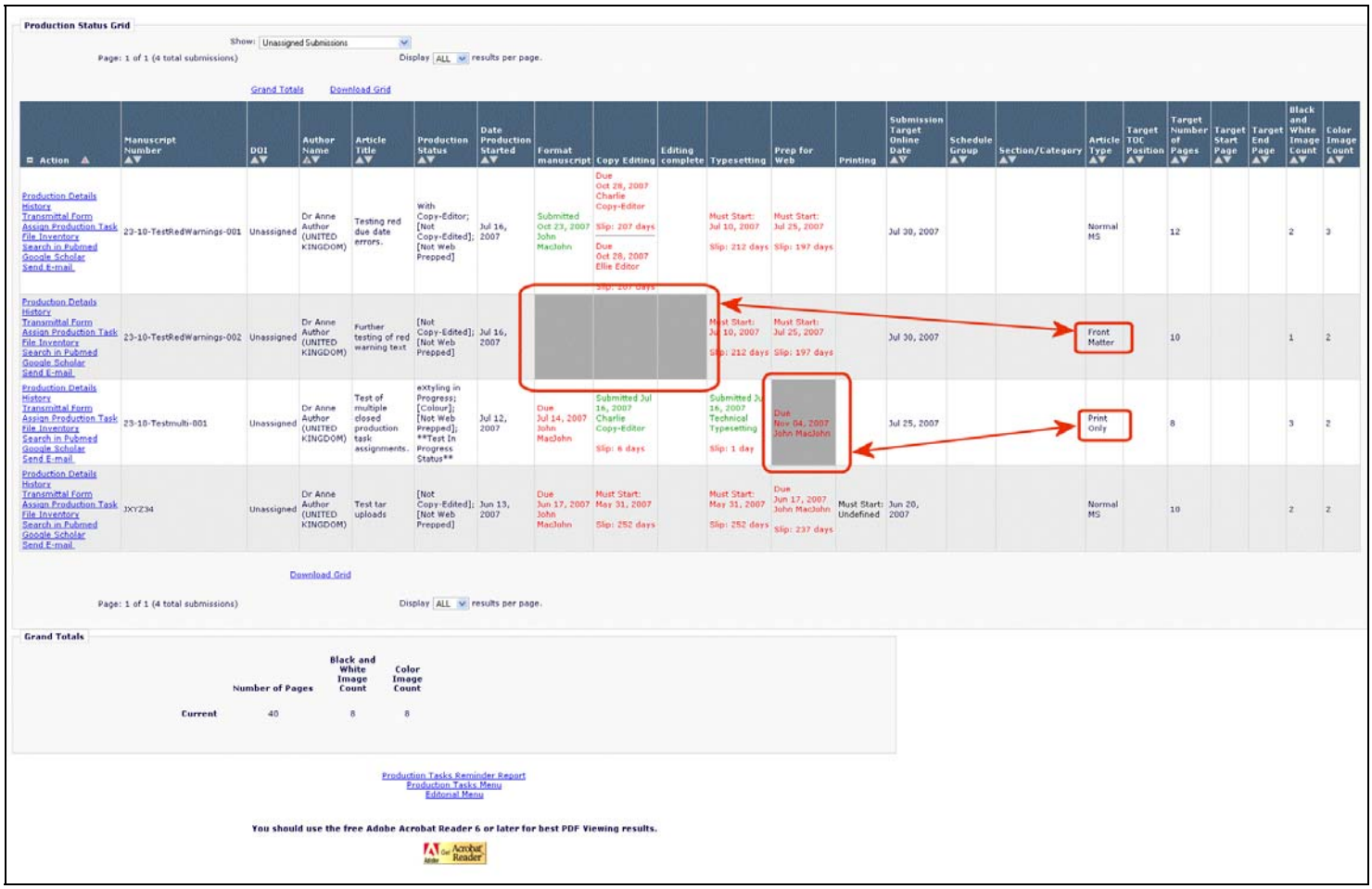

In addition, only the Production Tasks in the Submission Workflow are used when the system builds the submission schedule used behind the scenes to determine 'Must Start By' and 'Must End By' dates, Schedule Slip values and At Risk status for a submission.

Note that submissions that are already in production when you apply a new Submission Workflow will continue to show existing 'Must Start:' values in the Production Status Grid. If a non-Workflow task has previously been assigned for a submission, that task's dates will display in the grid, though the cell itself has a darkened background. The assigned Submission Workflow filtering will be seen when assigning tasks after the Workflow has been assigned to the Article Type.

TO CONFIGURE:
Under PolicyManager, click the new Define Submission Workflows link in the 'Preprint Manager' section:

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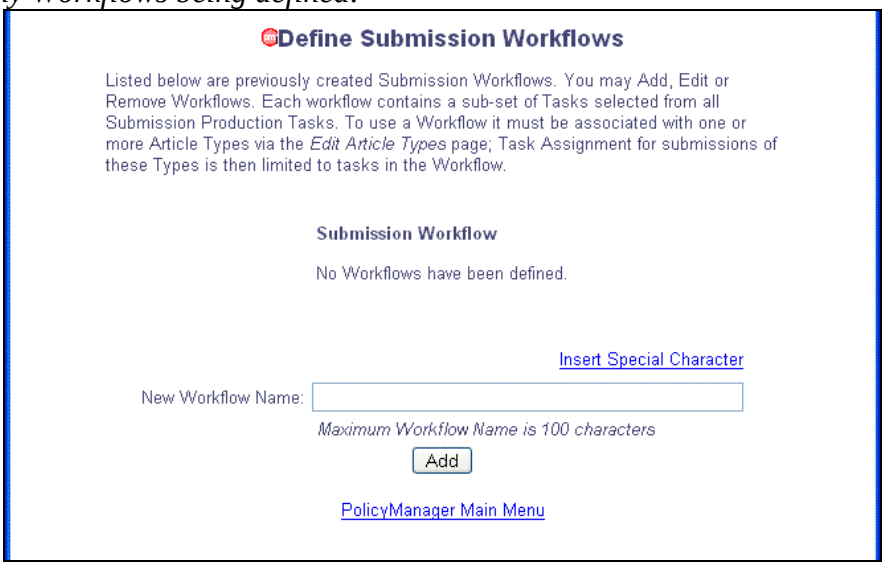
This takes you to the new *Define Submission Workflows* page. This page lists all previously defined Workflows.

Prior to any Workflows being defined:



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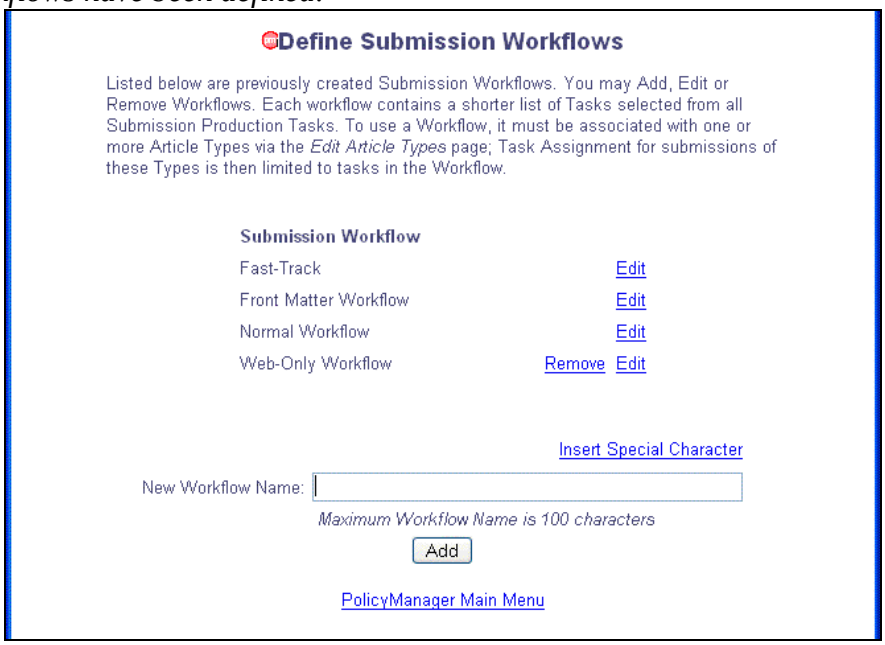
After Workflows have been defined:



Type a name for the Workflow in the 'New Workflow Name' field and click the 'Add' button. This will display the *Add/Edit Submission Workflow* page, which lists all non-hidden Submission Production Tasks as defined on the *Configure Submission Production Tasks* page. On this page, simply select those Submission Production Task Types to be included in this Workflow:

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NOTE: Although this page displays some configuration settings for your information, all due date functionality, task ordering and other configuration settings are defined on the *Configure Production Tasks* page as in version 7.0; each Submission Workflow is simply a list of tasks selected from the main list.

Once you have defined a Submission Workflow, it must be linked to an Article Type. Go to PolicyManager, Edit Article Types and click the Edit link by the Article Type which will use the new Submission Workflow.

A new 'Production Tracking Parameters' section has been added, containing a 'Use Submission Workflow' option. This option displays a drop-down list of all the currently defined Submission Workflows. On upgrade, the default selection in the drop-down list is "All Submission Production Tasks", which means no Workflow is selected.

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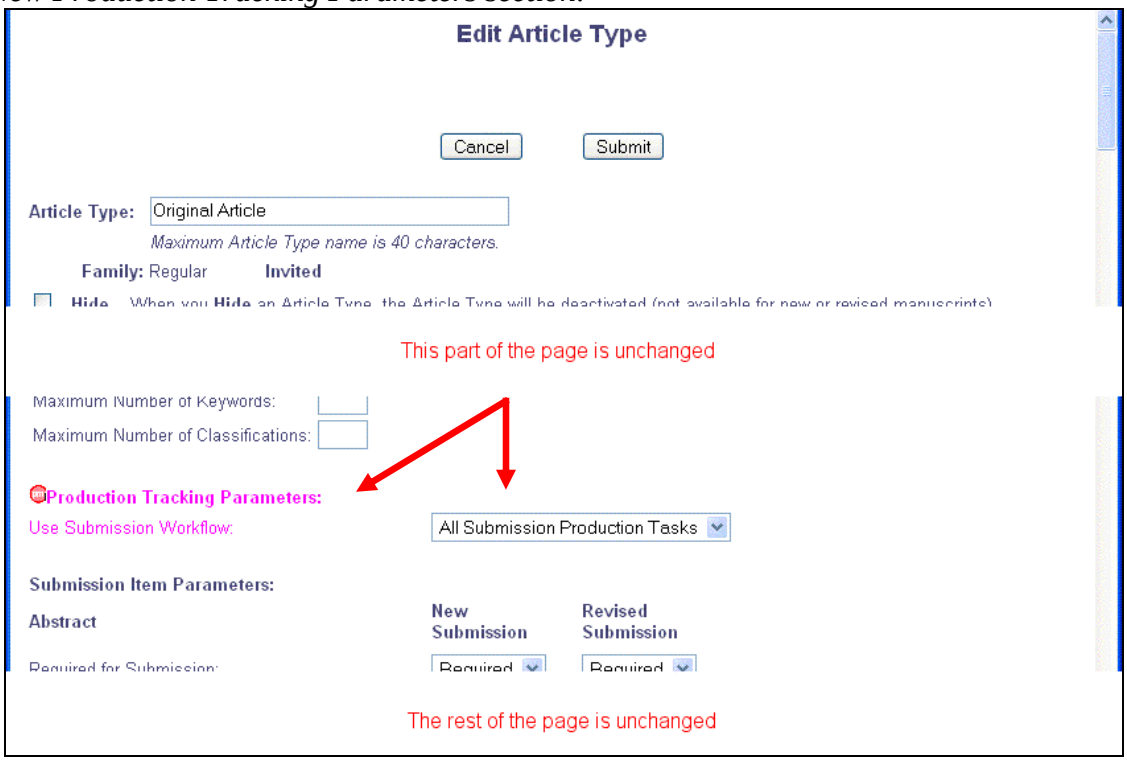
New Production Tracking Parameters section:



Select the newly-defined Submission Workflow from the drop-down. This will be applied immediately when assigning Submission Production Tasks, and on the Production Status Grid display. It will only be applied to 'Must Start' dates for submissions entering production after this point.

Note that each Article Type has a single Submission Workflow associated with it, but a specific Submission Workflow can be applied to multiple Article Types. At upgrade, the default setting is "All Submission Production Tasks".

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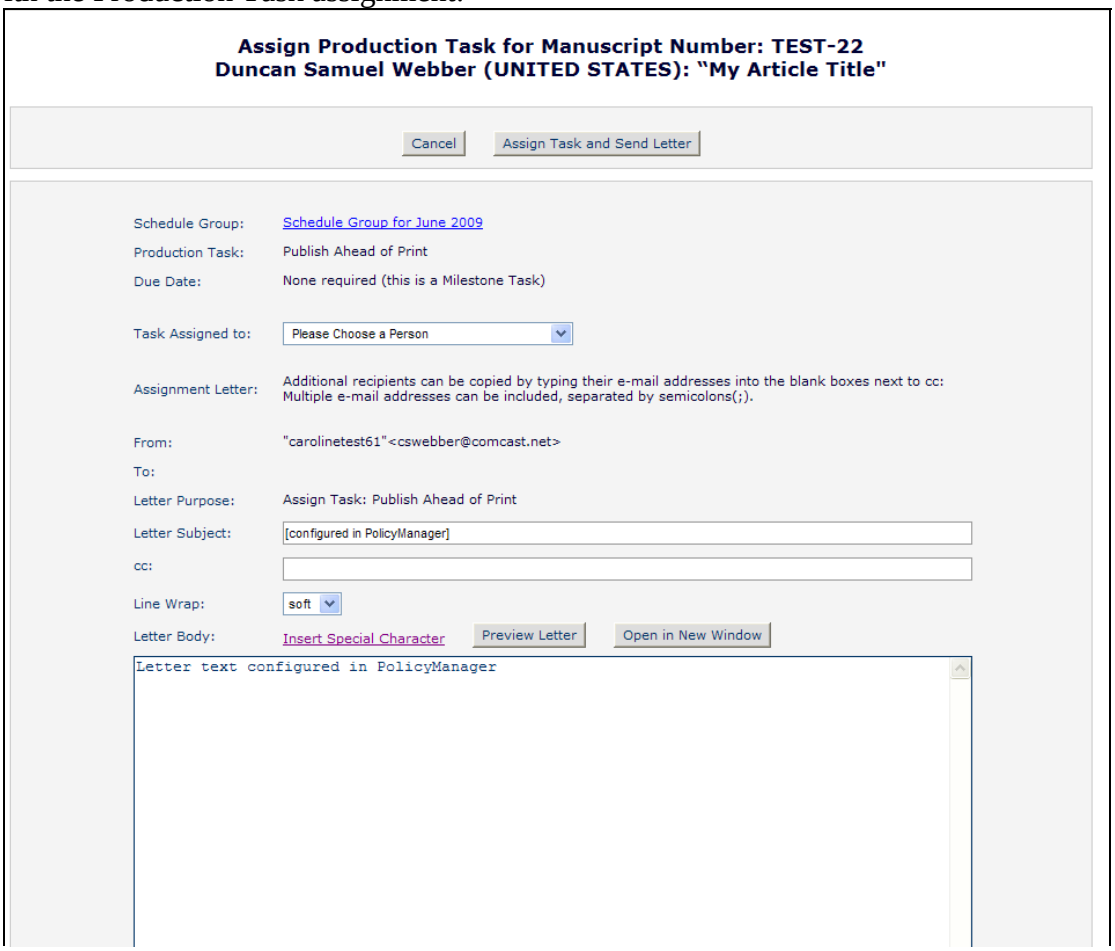
Production Task Transmittal can now include an XML metadata file and the system PDF file

PM v7.0 allows a user to send production task assignment files to an FTP server. The completed Production Task assignment can then be submitted back into PM by FTP.

This feature is enhanced in PM v7.1.

- The set of files FTP'ed out when a Production Task is assigned can now include the system PDF. [NOTE: This file is also available for assignment if the task is not FTP'ed].
- A metadata file in XML format can be included in the zip file of assignment files. [NOTE: This file is only available when the task is FTP'ed].
- The metadata file can be in a publisher-specific format, or can be in compliance with the National Library of Medicine (NLM) DTD. [NOTE: A partial set of metadata is included, not the full NLM set]. The receiving system can then read in metadata such as Article Title, Author names, etc. from the XML file.

The system-built PDF (Editor/Author version) is now available as an assignment file. As with other assignment files, its checkbox must be selected in order for it to be associated with the Production Task assignment:



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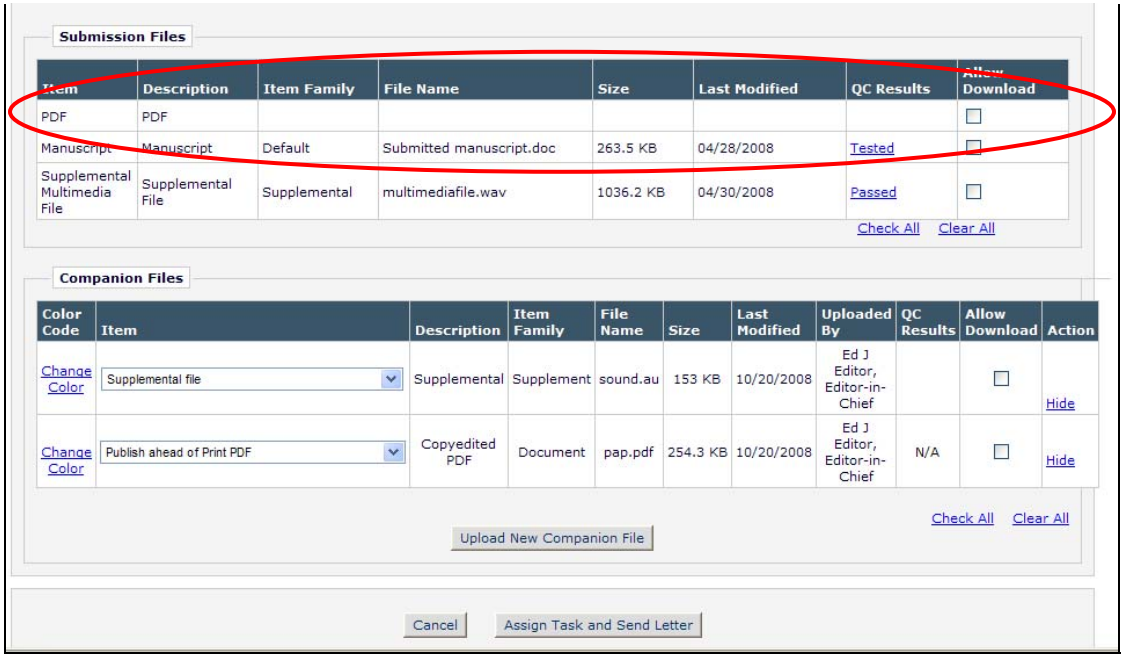

NOTE: The XML metadata file does not appear in the list of Submission Files or Companion Files. Instead, it is created 'behind the scenes' and added to the FTP'ed zip file if the Submission Production Task is configured to include an XML file. This configuration is done in PolicyManager, on a task-by-task basis.

TO CONFIGURE:
Under PolicyManager, click the Configure Submission Production Tasks link (available to Editors with appropriate permission). Clicking this link brings up the page of the same name. The 'FTP Options' section of the page is enhanced in PM v7.1.

- The 'Submission Production Task Transmittal Method' drop-down list now includes the 'NLM' method. Selecting this method causes an XML file formatted per the NLM DTD to be added to the FTP'ed zip file. The XML file is named [%JOURNALACRO%_%MS_NUMBER%].xml, and it is also listed in the FTP'ed '.go.xml'. file.
    - If no assignment files are selected when the task is assigned, and the task is configured with the NLM method, the only contents of the FTP'ed zip file will be the metadata file.
- Depending on the publication's publisher, a publisher-specific method may also be available.
- The 'General Production Task Export' method remains available. This existing method is unchanged in PM v7.1. Using this method triggers an FTP to the configured server with assignment files FTP'ed in zipped format. This method does not include a metadata file in the zip file.

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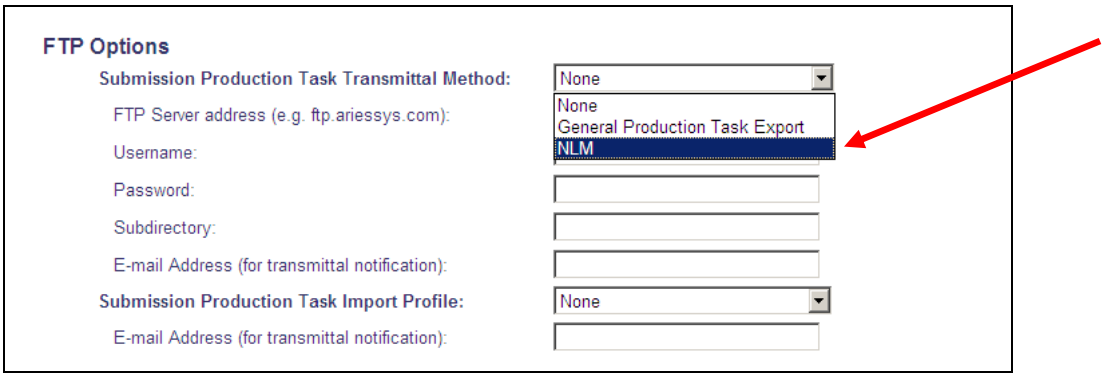

If a metadata file formatted to a specific DTD is required, please contact Aries' Customer Service to discuss the development of a custom Submission Production Task Transmittal Method.

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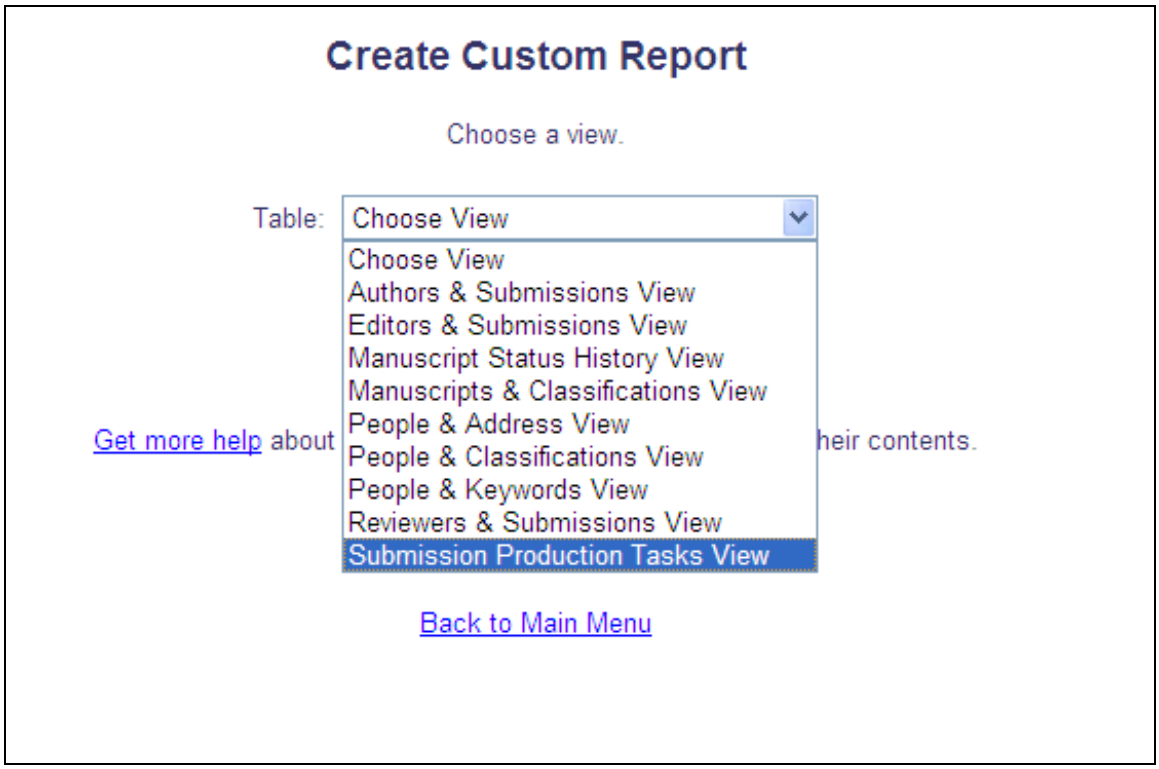
Submission Production Tasks Custom Report View

A new custom report view is now added to the list of available views. This new view, called 'Submission Production Tasks View', is available to Preprint Manager Production Tracking customers. This view appears at the bottom of the 'Table' drop-down list on the *Create Custom Report* page.



The following editorial and production tracking related output fields are available in this new view:

Publication Code **[SUBMISSION_PRODUCTION_TASKS_VIEW.JOURNAL_NAME]** The acronym of the publication as used in the EM/PM system.
Unique Document ID **[DOCUMENT.DOCUMENTID]** Unique identifier for each submission in the system. This is the number used in several other tables to specify data related to a particular submission.
DOI **[DOCUMENT.DOI]** The Digital Object Identifier (DOI) is an emerging international standard in the publishing industry. This value uniquely identifies this submission to the rest of the world. See http://www.doi.org for more information about this standard. **Hints:** According to the standard referred to above, a digital object identifier must take the form 10.[string]/[string], where [string] is a list of one or more Unicode characters.

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Manuscript Number [DOCUMENT.PUBDNUMBER]
Manuscript Number is assigned to a submission after it is received by the journal office. If the journal assigns Manuscript Numbers automatically, the system assigns the number when the submission is assigned to an Editor. If the journal assigns Manuscript Numbers manually, the Manuscript Number must be assigned before the submission can be assigned to an Editor. The value is null (blank) until this point (e.g. while Author is submitting his manuscript, while PDF is being built).

Revision Number [DOCUMENT.REVISION]
Revision Number - Value is '0' for Original Submissions, '1' for Revision 1, '2' for Revision 2, etc.

Parent Manuscript Number [ROLEAUTH_DOC_PEOPLE_ADDR.PARENT_MS_NUM]
The manuscript number of asubmission that generated anAuthor invitation for this submission. This will not have a value unless the submission in the results is an invited submission.

Article Title [DOCUMENT.DTITLE]
Title entered by Author when submitting a new manuscript.

Short Title [DOCUMENT.SHORT_TITLE]
Short Title entered by Author when submitting a new manuscript.

Article Type [DOCUMENT.CATEGORY]
Article Type is required for submission. Values are defined by the journal, and may include values such as Original Study, Rapid Communication, Case Study.

Section/Category Name [ROLEAUTH_DOC_PEOPLE_ADDR.SECTIONNAME]
Section Name

Corresponding Author First Name [ROLEAUTH_DOC_PEOPLE_ADDR.CORR_AUTHOR_FIRSTNAME]

Corresponding Author Middle Name [ROLEAUTH_DOC_PEOPLE_ADDR.CORR_AUTHOR_MIDDLENAME]

Corresponding Author Last Name [ROLEAUTH_DOC_PEOPLE_ADDR.CORR_AUTHOR_LASTNAME]

Corresponding Author Country [SUBMISSION_PRODUCTION_TASKS_VIEW.COUNTRY]
The country the Author selected at registration.

Corresponding Author E-mail Address [SUBMISSION_PRODUCTION_TASKS_VIEW.EMAIL]
The e-mail address of the corresponding author

Manuscript Geographic Region of Origin [DOCUMENT_VIEW.REGION_NAME]
Entered by the Author or Editor as a manuscript submission step. It may be a country or a custom-defined region.

Author Stop Date [ROLEAUTH.RSTOP]
Date/time that the Author stopped working on this revision of the manuscript. The Author either approved the manuscript for submission or removed the manuscript.

Days with Author [ROLEAUTH.ROLEDAYS]
The number of days the submission was with the Author.
Hints: The difference in days between Author Start Date and Author Stop Date.

First Author First Name [AUTHOR_INFO.FIRSTAUTHOR_FIRSTNAME]
First Author's first name.

First Author Middle Name [AUTHOR_INFO.FIRSTAUTHOR_MIDDLENAME]
First Author's middle name.

First Author Last Name [AUTHOR_INFO.FIRSTAUTHOR_LASTNAME]
First Author's last name.

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First Author Degree [AUTHOR_INFO.FIRSTAUTHOR_DEGREE]
Degrees held by the First Author of the article (e.g. Ph.D., MD, FACEP, FAC, DO).

All Authors [AUTHOR_INFO.ALLAUTHORS]
This field contains a list of all the authors (including corresponding author) for the manuscript. The list contains first name, middle name, last name and degree for each author and the authors are separated by a ;

Corresponding Production Editor First Name
[ROLEAUTH_DOC_PEOPLE_ADDR.CORR_PROD_ED_FIRSTNAME]
The first name of the Corresponding Production Editor

Corresponding Production Editor Middle Name
[ROLEAUTH_DOC_PEOPLE_ADDR.CORR_PROD_ED_MIDDLENAME]
The middle name of the Corresponding Production Editor

Corresponding Production Editor Last Name
[ROLEAUTH_DOC_PEOPLE_ADDR.CORR_PROD_ED_LASTNAME]
The last name of the Corresponding Production Editor

Corresponding Production Editor Degree [ROLEAUTH_DOC_PEOPLE_ADDR.CORR_PROD_ED_DEGREE]
The Degree of the Corresponding Production Editor

Corresponding Production Editor Role [ROLEAUTH_DOC_PEOPLE_ADDR.CORR_PROD_ED_ROLE]
The Role of the Corresponding Production Editor

Corresponding Production Editor Description
[ROLEAUTH_DOC_PEOPLE_ADDR.CORR_PROD_ED_DESCRIPTION]
The Description of the Corresponding Production Editor

Initial Date Submitted [DOCUMENT.RECEIVED]
The date the Author approved his initial submission of the manuscript, and it was received by the journal office. This is the date that is used to calculate the elapsed time to decision for a submission.
Hints: The Initial Date Submitted may be overwritten if the Editor edits the submission and sends it back to the Author for approval before another Editor is assigned (edited in New Submissions folder) or before any Reviewers have been invited (edited in New Assignments folder). In this case, the original Received Date is overwritten with the date the Author approved the edited submission.

Editorial Status [DSTATUS.NAME]
Editorial Status Term defined by the journal.

Editorial Status Date [DOCUMENT.STATUSDATE]
Date the Status changed in the Manuscript Status field. The journal defines the changes in status for each event in ActionManager.
Hints: Note that some events are non-configurable by the journal.

Technical Check Completion Date [REVHIST.TECHNICAL_CHECK_COMPLETE_DATE]
Timestamp indicating when an Editor specified the Technical Check for a submission is complete.

Date Revision Submitted [REVHIST.REVISION_SUBMITTED_DATE]

Date First Editor Assigned [SUBMISSION_PRODUCTION_TASKS_VIEW.DATE_ASSIGNED]
The date the first editor was assigned.

Date of First Decision [SUBMISSION_PRODUCTION_TASKS_VIEW.DATE_OF_FIRST_DECISION]
The date the first decision was made on the submission.

Date Editor Making Final Decision Assigned
[SUBMISSION_PRODUCTION_TASKS_VIEW.DATE_ED_FINAL_ASSIGNED]
The date the Editor who made the final decision was assigned.

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Final Decision Date [DOCUMENT.FINALDECISIONDATE]
Most recent Editor's decision date, that is, date when the final decision was made by the Editor.

Date Final Disposition Set [DOCUMENT.DDISPOSIDATE]
Date the final disposition was set on the manuscript.

Date First Entered Production [DOCUMENT.DATE_FIRST_ENTERED_PRODUCTION]
Date the submission was put into production for the first time. Not updated if a submission reenters production. (See also Date Production Was Initiated.)

Date Production Was Initiated [DOCUMENT.DATE_PRODUCTION_WAS_INITIATED]
Date the submission was put into production. Updated each time the submission (re)enters production. (Version 6.0+: See also Date First Entered Production.)

Date Production Was Completed [DOCUMENT.DATE_PRODUCTION_WAS_COMPLETED]
Date production was completed for the submission.

Submission Target Publication Date [SUBMISSION_PRODUCTION.TARGET_PUB_DATE]
This submission's individual target publication date.

Submission Target Publication Volume [SUBMISSION_PRODUCTION.TARGET_PUB_VOLUME]
This submission's individual target publication volume.

Submission Target Publication Issue [SUBMISSION_PRODUCTION.TARGET_PUB_ISSUE]
This submission's individual target publication issue.

Submission Target Online Publication Date [DOCUMENT.TARGET_ONLINE_PUB_DATE]
Target Online Publication Date

Submission Target Number of Pages [SUBMISSION_PRODUCTION.TARGET_NUMBER_OF_PAGES]
The target number of pages the submission will take up in the printed issue.

Submission Actual Online Publication Date [DOCUMENT.ACTUAL_ONLINE_PUB_DATE]
Actual Online Publication Date

Submission Actual Publication Date [DOCUMENT.PUBDATE]
Date the submission is to be published. Updatable on publisher information page and on the Transmittal Form.

Submission Actual Publication Volume [DOCUMENT.PUBVOLUME]
Journal's Volume Number in which the submission is to be published. Updatable on publisher information page and on the Transmittal Form.

Submission Actual Publication Issue [DOCUMENT.PUBISSUE]
Journal's Issue Number in which the submission is to be published. Updatable on publisher information page and on the Transmittal Form.

Submission Actual Publication Start Page [DOCUMENT.START_PAGE]
Actual Start Page

Submission Actual Publication End Page [DOCUMENT.END_PAGE]
Actual End Page

Actual Print Pages of Article [DOCUMENT.SETPAGES]
Total number of pages the article occupies in the printed journal. Updatable on publisher information page and on the Transmittal Form.

Black and White Image Count [SUBMISSION_PRODUCTION.BLACK_AND_WHITE_IMAGE_COUNT]
Black and White Image Count

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Color Image Count [SUBMISSION_PRODUCTION.COLOR_IMAGE_COUNT]
Color Image Count

Publish With ID [DOCUMENT.PWID_ID]
ID of the PUBLISH_WITH_ID record assigned to this submission.

Submission Created Using Short Interface [DOCUMENT.CREATED_USING_SHORT_INTERFACE]
Set to 1 if this submission was created using the "Short" Submission Interface (via Search People from the Production Tasks menu). The "Short" Submission Interface allows editors with Create Submission permission to create new submissions using a simplified workflow. Submissions are placed directly into Production Tracking on behalf of authors, automatically initiating production on the submissions.

Import Date [DOCUMENT.IMPORT_DATE]
Date that a submission was imported from a third-party system. This date is NULL by default, meaning that the submission was not imported from a third-party system.

Production Notes [DOCUMENT.PRODUCTION_NOTES]

Custom Production Status Term [SUBMISSION_PRODUCTION_TASKS_VIEW.PRODUCTION_STATUS_TEXT]
The custom production status term. This will not have a value unless custom production status terms have been configured.

System Production Status Term [SUBMISSION_PRODUCTION_TASKS_VIEW.PRODUCTION_STATUS_NAME]
The system production status term

Submission Schedule Slip Figure [SUBMISSION_PRODUCTION.SCHEDULE_SLIP]
This is the schedule slip figure for a submission.

Schedule Group Description [SCHEDULE_GROUPS.SCHEDULE_GROUP_DESCRIPTION]
Schedule Group Description

Schedule Group Unique Identifier [SCHEDULE_GROUPS.SCHEDULE_GROUP_ID]
Unique key into the Schedule Groups table

Schedule Group Target Publication Date [SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_PUB_DATE]
Target Publication Date

Schedule Group Target Publication Volume
[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_VOLUME]
Target Publication Volume

Schedule Group Target Publication Issue [SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_ISSUE]
Target Publication Issue

Schedule Group Target Online Publicaton Date
[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_ONLINE_PUB_DATE]
Target Online Publication Date

Schedule Group Target Start Page [SCHEDULE_GROUPS_TOC.TARGET_START_PAGE]
Target Start Page

Schedule Group Target End Page [SCHEDULE_GROUPS_TOC.TARGET_END_PAGE]
Target End Page

Schedule Group Target Table of Contents Position [SCHEDULE_GROUPS_TOC.TABLE_OF_CONTENTS]
Target Table of Contents Position

Submission Production Task Name [PRODUCTION_TASKS.PRODUCTION_TASK_NAME]
Name of the Submission Production Task

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Submission Production Task ID **[ROLEPROD.PRODUCTION_TASK_ID]**
The Submission Production Task associated with the Submission Production Task Assignment.

Submission Production Task Assignment Start Date **[ROLEPROD.RSTART]**
Date/time when Submission Production Task was assigned

Submission Production Task Assignment Stop Date **[ROLEPROD.RSTOP]**
Date/time when the Submission Production Task Assignment was cancelled or submitted.

Submission Production Task Assigned By First Name
[SUBMISSION_PRODUCTION_TASKS_VIEW.FIRSTNAME]
The first name of the person who assigned the Submission production task.

Submission Production Task Assigned By Middle Name
[SUBMISSION_PRODUCTION_TASKS_VIEW.MIDDLENAME]
The middle name of the person who assigned the submission production task.

Submission Production Task Assigned By Last Name
[SUBMISSION_PRODUCTION_TASKS_VIEW.LASTNAME]
The last name of the person who assigned the submission production task.

Submission Production Task Assigned by Role
[SUBMISSION_PRODUCTION_TASKS_VIEW.ASSIGNED_BY_ROLE]
The Editor/Publisher Role of the person who assigned the submission production task.

Submission Production Task Assigned To First Name
[SUBMISSION_PRODUCTION_TASKS_VIEW.ASSIGNED_TO_FIRSTNAME]
The first name of the person to whom the submission production task was assigned.

Submission Production Task Assigned To Middle Name
[SUBMISSION_PRODUCTION_TASKS_VIEW.ASSIGNED_TO_MIDDLENAME]
The middle name of the person to whom the submission production task was assigned.

Submission Production Task Assigned To Last Name
[SUBMISSION_PRODUCTION_TASKS_VIEW.ASSIGNED_TO_LASTNAME]
The last name of the person to whom the submission production task was assigned.

Submission Production Task Assigned To Role
[SUBMISSION_PRODUCTION_TASKS_VIEW.ASSIGNED_TO_ROLE]
The Role of the person to whom the submission production task was assigned. The Role can be an Author, Editor or Publisher Role. Reviewers cannot be assigned submission production tasks.

Days between Submission Production Task Assignment and Task Completion
[SUBMISSION_PRODUCTION_TASKS_VIEW.DAYSBETWEENSUBMISSION]
Days between Submission Production Task Assignment and Task Completion

Days Submission Production Task was Late
[SUBMISSION_PRODUCTION_TASKS_VIEW.DAYSSUBMISSIONLATE]
Number of Days Submission Production Task was late

Submission Production Task Assignment Due Date
[SUBMISSION_PRODUCTION_TASKS_VIEW.DUE_DATE]
Date the Submission Production task assignment is due

Submission Production Task Must Be Started By Date
[SUBMISSION_PRODUCTION_TASKS_VIEW.MUST_START_BY]
The date the submission production task must be started by to meet the configured production schedule.

Submission Production Task Must End Date **[SUBMISSION_PRODUCTION_TASKS_VIEW.MUST_END_BY]**
The date the submission production task must end by to meet the configured production schedule.

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Submission Production Task Date Last Reminder Sent **[SUBMISSION_PRODUCTION_TASKS_VIEW.LAST_REMIND_DATE]** The date the last reminder was sent for this submission production task. If no reminders have been sent, there will be no value for this field.
Submission Production Task Total Number of Reminders Sent **[SUBMISSION_PRODUCTION_TASKS_VIEW.REMIND_COUNT]** Total number of reminders sent for the submission production task.
Submission Production Task Cancellation Date **[SUBMISSION_PRODUCTION_TASKS_VIEW.CANCELLATION_DATE]** Date when the submission production task was cancelled.
Submission Production Task Slip [ROLEPROD.TASK_SLIP] This figure is calculated for this particular production task assignment if the submission is in production, and the production task calls for such calculation.
Submission Production Task Has Assignment Files **[SUBMISSION_PRODUCTION_TASKS_VIEW.HAS_ASSIGNMENT_FILES]** Whether or not the submission production task has assignment files associated with it.
Conference Name [DOCUMENT_CLASS.CONFERENCE_NAME]
Conference Presentation Type [DOCUMENT_CLASS.CONFERENCE_PRESENTATION_TYPE]
Conference Presentation Date [DOCUMENT_CLASS.CONFERENCE_PRESENTATION_DATE] Information related to a conference submission. Journals may send out requests for abstracts or full-length articles to be presented at a conference. These abstracts/articles are submitted via the existing manuscript submission pages as conference submissions, which may later be published in the journal or in a separate book.
Conference Session [DOCUMENT_CLASS.CONFERENCE_SESSION] Information related to a conference submission. Journals may send out requests for abstracts or full-length articles to be presented at a conference. These abstracts/articles are submitted via the existing manuscript submission pages as conference submissions, which may later be published in the journal or in a separate book.
Conference Presentation Sequence [DOCUMENT_CLASS.CONFERENCE_PRESENTATION_SEQUENCE] Information related to a conference submission. Journals may send out requests for abstracts or full-length articles to be presented at a conference. These abstracts/articles are submitted via the existing manuscript submission pages as conference submissions, which may later be published in the journal or in a separate book.
Conference Submission Book Title [DOCUMENT_CLASS.CONFERENCE_SUBMISSION_BOOK_TITLE]

When a report is run using this View, results will include only submissions on which production has been initiated. Submissions remain in this view even after production has been ended, but can be excluded from the results using the selection criteria drop-down boxes if desired.

After running the report, the results will display one row for every production task associated with a submission. If a submission has one production task, one result row will be returned. If a submission has more than one production task, one row will be returned for each production task. NOTE: If a submission has no production tasks associated with it, a row will still be returned for the submission itself. You may use the selection criteria to filter out submissions with no production tasks if desired.

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The view displays the current revision number of the submission. It does not return a row for each revision, but if a task was associated with an earlier revision, the task will be returned in the results set.

As with the other custom report views:

- The report results can be downloaded in a tab-delimited format, suitable for use by Excel or other reporting packages.
- The report can be saved, and will be accessible to the user who saved it.

TO CONFIGURE:
No configuration is necessary. The new report view will be automatically displayed on the 'Create Custom Report' page for PM users.

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