

# CONFIDENTIAL AND PROPRIETARY

Aries Systems Corporation

 **Editorial Manager**<sup>®</sup>

 **Preprint Manager**<sup>®</sup>

 **Commerce Manager**<sup>™</sup>

## Release Notification

**Editorial Manager/Preprint Manager**  
**8.2 General Release Notification**  
**06/08/2011**  
**Draft – Subject to Change**

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## Document Change Log

<b>Date</b>	<b>Version</b>	<b>Change</b>
03/01/2011	Beta Release	Beta version
04/07/2011	Gamma Release	Clarification of reports added to 'Automated Author Reminders' section.
06/08/2011	General Release	Additional 'Suggest Editor' feature Inclusion of system PDF in "Attach Files to Ad Hoc Letters" section

## Editorial Manager/Preprint Manager 8.2 General Release Notification

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# GENERAL ENHANCEMENTS

## Customize PDF Cover Page Layout

In EM/PM version 8.1, the PDF Cover Pages for every submission may be comprised of certain fields as configured for the specific Article Type. While Publications may select fields to appear on either the Editor/Author PDF cover page or the Reviewer PDF cover page, Publications have requested additional fields to be made available for selection on the cover page.

New in version 8.2, Publications may create customized PDF cover page layouts which are then associated with Article Types. The customized layout allows Publications to:

- Select which data items are displayed on the cover page. This includes the addition of new data elements that were not previously visible on any PDF cover page.
- Define the order in which selected items appear on the cover page.
- Assign one PDF cover page layout for the Editor/Author PDF and a separate layout for the Reviewer PDF, for each Article Type.

On upgrade to version 8.2, there are two default layouts:

- Editor/Author version, containing:
  - Manuscript Number
  - Article Type
  - Section/Category
  - Keywords
  - Corresponding Author (First, Middle and Last Name, Institute, City, State, and Country)
  - First Author
  - All Authors (List including Corresponding Author)
  - Region of Origin
  - Abstract
- Reviewer version, containing:
  - Manuscript Number
  - Article Type
  - Section/Category
  - Keywords
  - Region of Origin
  - Abstract

There is also one ‘Editor/Author Layout’ and one ‘Reviewer Layout’ for each unique Article Type PDF Cover Page configuration already set up in the Publication. If version 8.1 has PDF requirements configured for specific Article Types, these will be copied into new layouts (numbered as, for example, ‘Editor/Author Layout 001’, ‘Editor/Author Layout 002’ etc). This ensures that a Publication’s cover page configurations prior to upgrade will remain completely

intact following upgrade to 8.2. The Publication may then choose to change the layout names for easier reference, add new items to the layouts, change the order in which items are displayed, etc.

Additionally, custom layouts may be created, where users may choose to include any of the following fields:

- Full Title
- Secondary Full Title
- Short Title
- Secondary Short Title
- Corresponding Author E-Mail
- Other Authors (List excluding Corresponding Author)
- All Authors Secondary Information (List including Corresponding Author)
- Secondary Abstract
- Secondary Keywords
- Classifications
- Author Comments
- Requested Editor
- Suggested Reviewers
- Opposed Reviewers
- Response to Reviewers
- Corresponding Author Secondary Information
- Corresponding Author Institution
- Secondary Corresponding Author Institution
- First Author Secondary Information

When a new submission is created after the Publication is upgraded to version 8.2, the new PDF cover page configuration is included.

In addition to the addition of new fields, the cover page styling is enhanced in version 8.2 to present a clearer delineation of the contents of the page.

*Sample Editor/Author Default PDF Layout:*

**Betsy's 8.2 Test Site**  
**Demonstration of New PDF Cover Pages**  
 --Manuscript Draft--

Manuscript Number:	
Article Type:	Original Study
Section/Category:	Demonstration Category
Keywords:	These; are; keywords
Corresponding Author:	Kermit the Frog , CONGO, THE DEMOCRATIC REPUBLIC OF THE
First Author:	Kermit the Frog
All Authors:	Kermit the Frog Miss Piggy
Manuscript Region of Origin:	South Pacific (incl. Australia, New Zealand, etc.)
Abstract:	This is a sample of the Abstract.

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*Sample Reviewer Default PDF Layout:*

**Betsy's 8.2 Test Site**  
**Demonstration of New PDF Cover Pages**  
 --Manuscript Draft--

Manuscript Number:	BETSYTEST82-D-11-00002
Article Type:	Original Study
Section/Category:	Demonstration Category
Keywords:	These; are; keywords
Manuscript Region of Origin:	South Pacific (incl. Australia, New Zealand, etc.)
Abstract:	This is a sample of the Abstract.

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*Sample Custom PDF Layout:*

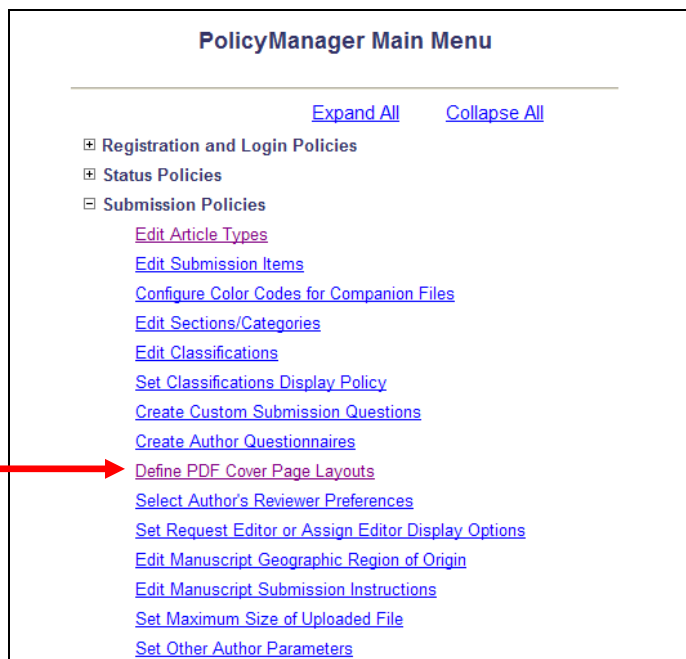
**Betsy's 8.2 Test Site**  
**Demonstration of Custom Cover Page**  
--Manuscript Draft--

Article Type:	Perspective
Full Title:	Demonstration of Custom Cover Page
Corresponding Author:	Audry Author , UNITED STATES
Manuscript Classifications:	9: BACTERIOLOGY; 13: EPIDEMIOLOGY
Section/Category:	Demonstration Category

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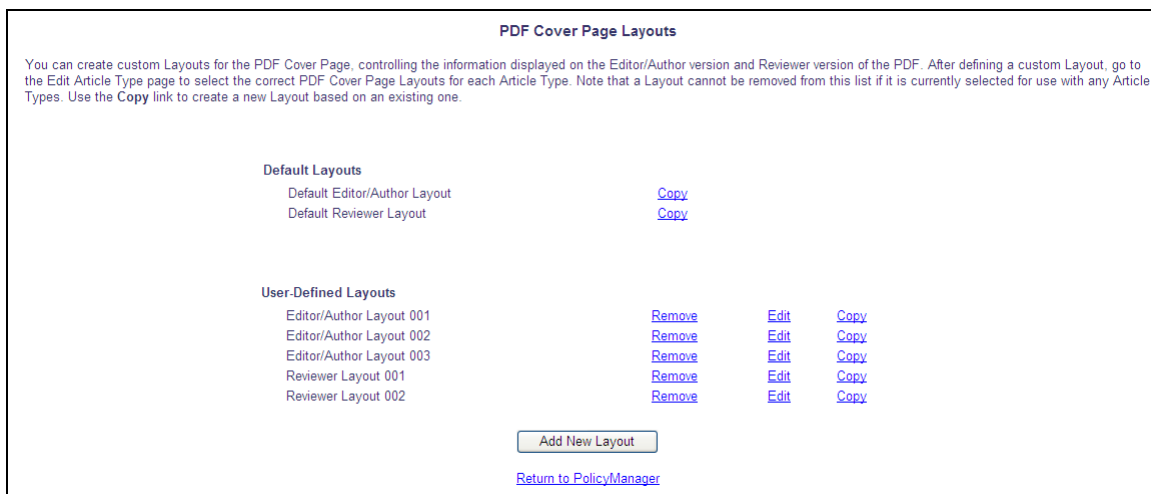
**TO CONFIGURE:**

On upgrade to version 8.2, two default layouts are already in place with a “core set” of fields displayed (see above). There is also one ‘Editor/Author Layout’ and one ‘Reviewer Layout’ for each unique Article Type PDF Cover Page configuration in place on the 8.1 site. These layouts represent the ‘library’ of existing page layouts in the system, to ensure that a Publication’s PDF cover page configurations remain intact following upgrade. To view these layouts, edit existing layouts, or create new layouts, click the [Define PDF Cover Page Layouts](#) link in the ‘Submission Policies’ section of PolicyManager.



The easiest way to create a new layout is to Copy an existing layout and make changes to the already established layout. New PDF Cover Page Layouts can be started ‘from scratch’ by clicking the ‘Add New Layout’ button. User-Defined layouts may be edited by clicking the Edit link, or removed by clicking Remove.

NOTE: A PDF layout currently associated with an Article Type cannot be removed. If the Remove link is clicked for a layout that is currently associated with one or more Article Types, an alert box is displayed listing all of the Article Types that are currently associated with that PDF Cover Page Layout.



Clicking the ‘Add New Layout’ button opens the *Add/Edit PDF Cover Page Layout* page, allowing a new layout to be created from scratch. A unique Layout Name must be entered before fields can be selected for display.



**Add/Edit PDF Cover Page Layout for**

Layout Name:   
*(Maximum of 100 characters)*

**Select Items**  
 You must save your new layout before you add items to it.

Clicking Edit on an existing layout, or entering a Layout Name and clicking ‘Submit’ on a new layout opens the *Add/Edit PDF Cover Page Layout* page.

**Add/Edit PDF Cover Page Layout for**

Layout Name:   
*(Maximum of 100 characters)*

**Select Items**  
 Click the 'Select Items to Display' link to choose the data items that will appear on this PDF Cover Page Layout.

[Select Items to Display](#)

**Layout order**  
 Select the order in which the items should appear on the PDF Cover Page. To re-order the items, change the number for one item, click the 'Update Order' button, and all of the fields will re-order accordingly.  
 No items currently exist in this layout

Click the Select Items to Display link to select items.

NOTE: If an existing layout is opened, the items selected reflect the existing layout.

**Select Items to Display for**

Select the information to appear on the PDF Cover Page.

---

**Information Submitted by Author**

- Article Type
- Full Title
- Secondary Full Title
- Short Title
- Secondary Short Title
- First Author
- Corresponding Author (*First, Middle and Last Name, Institute, City, State, and Country*)
- Corresponding Author E-Mail
- Other Authors (*List excluding Corresponding Author*)
- All Authors (*List including Corresponding Author*)
- All Authors Secondary Information (*List including Corresponding Author*)
- Abstract
- Secondary Abstract
- Section/Category
- Keywords
- Secondary Keywords
- Classifications
- Author Comments
- Requested Editor
- Region of Origin
- Suggested Reviewers
- Opposed Reviewers
- Response to Reviewers
- Corresponding Author Secondary Information
- Corresponding Author Institution
- Secondary Corresponding Author Institution
- First Author Secondary Information

**General Manuscript Information**

- Manuscript Number

Select items to display on the PDF Cover Page by selecting/checking the box and clicking ‘Submit’. The selected items now display on the *Add/Edit PDF Cover Page Layout* page, where the order in which the items are displayed on the cover page can be changed using the ‘Update Order’ button.

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

**Add/Edit PDF Cover Page Layout for New Editor/Author Layout**

Layout Name:   
*(Maximum of 100 characters)*

**Select Items**

Click the 'Select Items to Display' link to choose the data items that will appear on this PDF Cover Page Layout.

[Select Items to Display](#)

**Layout order**

Select the order in which the items should appear on the PDF Cover Page. To re-order the items, change the number for one item, click the 'Update Order' button, and all of the fields will re-order accordingly.

<input type="button" value="Update Order"/>	<b>Default Description</b>
<input type="text" value="1"/>	Article Type
<input type="text" value="2"/>	Full Title
<input type="text" value="3"/>	Corresponding Author <i>(First, Middle and Last Name, Institute, City, State, and Country)</i>
<input type="text" value="4"/>	Abstract
<input type="text" value="5"/>	Section/Category
<input type="button" value="Update Order"/>	

Clicking the 'Submit' button saves the layout. Once the PDF Cover Page layouts are created/customized, the layout must be associated with an Article Type. When a site is upgraded to version 8.2, PDF Cover Page layouts will automatically be assigned to existing Article Types (either the default layout or the layout associated with that Article Type on upgrade).

Go to 'Edit Article Types', and Edit any existing Article Type for which a custom layout should be assigned. A new 'Article Type Parameters' section is displayed just above the Submission Step Preferences section. A PDF Cover Page Layout is selected for the Editor/Author PDF and for the Reviewer PDF.

*Partial Page Display; note the column headers and checkboxes for each submission step are no longer displayed:*

Set the values required for a new and/or revised manuscript		
	<b>New Submission</b>	<b>Revised Submission</b>
Days to Review This Article Type:	<input type="text" value="5"/>	<input type="text" value="5"/>
<b>PDF Cover Page Layout</b>	<b>Editor/Author Version</b>	<b>Reviewer Version</b>
	<input type="text" value="New Editor/Author Layout"/>	<input type="text" value="Default Reviewer Layout"/>
<b>Article Type Parameters</b>	<b>New Submission</b>	<b>Revised Submission</b>
Set Secondary "Full Title" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set "Short Title" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set Secondary "Short Title" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set "Select Section/Category" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set "Submit Abstract" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set Secondary "Submit Abstract" Preferences:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>
Set "Enter Keywords" Preferences:	<input type="text" value="Optional"/>	<input type="text" value="Optional"/>

## Ability to Send Username/Password from a User’s Record

In EM/PM version 8.1, users may request to have their login information sent to them by clicking the [Send Username/Password](#) link in the login box. New in version 8.2, Editors with proper permission may now send Username/Password information from a user’s *Search People – Update Information* page.

Editor roles with the existing ‘Search People’ permission enabled, and a new ‘Send Username and Password’ sub-permission enabled, will now see a ‘Send Username/Password’ button on the left-side of any *Search People – Update Information* page.

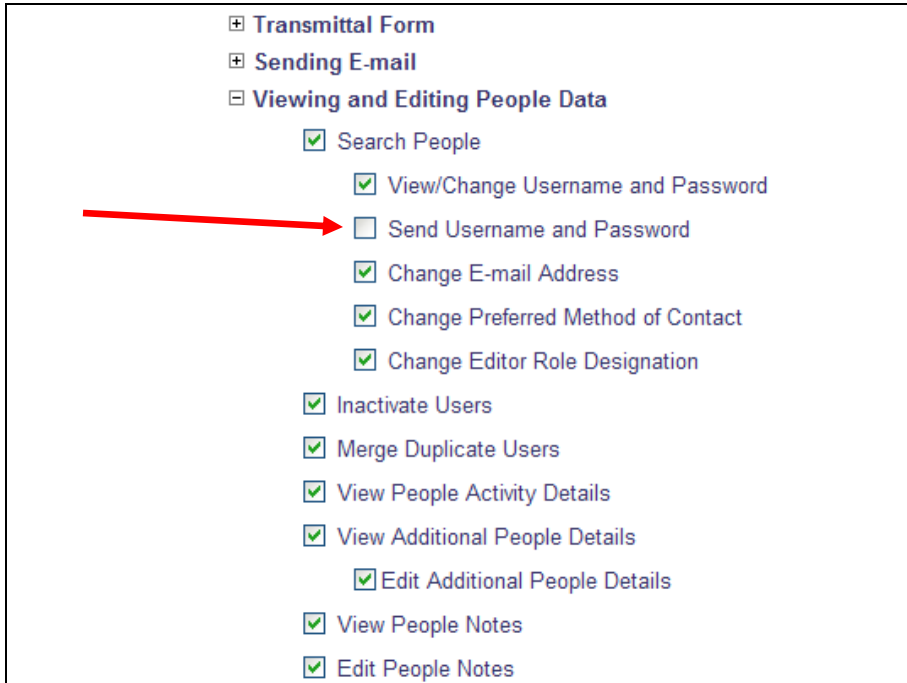
The screenshot shows the 'Search People - Update Information' page. On the left, there is a sidebar with the user's name 'Dr. Jane First', registration details, and an 'Inactivate this User' button. A red box highlights the 'Send Username/Password' button. The main content area is titled 'User Information' and contains a form with fields for 'User Name \*' (filled with 'Jane') and 'Password \*' (masked with '\*\*\*\*\*'). Below these are dropdown menus for 'Default Login Role' (set to 'Author'), 'Default Login Menu' (set to 'Editorial Menu'), 'Reviewer Role \*' (set to 'Reviewer'), 'Publisher Role \*' (set to 'None'), and 'Editorial Role \*' (set to 'None'). There are also radio button options for 'Available as a Reviewer?', 'Board Member?', and 'Forbidden as a Reviewer?'. A 'Send Username/Password' button is located at the bottom of the form area.

Clicking this button will automatically send the letter configured for the event “Forgot Username or Password”. The user’s information will populate the letter that is sent. If there is no letter configured for this event, the Editor will receive an error message that reads “No letter has been configured for this event. Please contact the Editorial Office for assistance.” If a letter is configured and is sent, the Editor will see a confirmation page informing them that the letter has been sent.

The screenshot shows the 'Send Username and Password Confirmation Page'. It features a success message: 'The requested username and password have been emailed.' Below the message is a blue link that says 'Return to Search People - Update Information'.

TO CONFIGURE:

In RoleManager, select the Editor role(s) that will be given permission to send Username/Password information, and select/enable the new “Send Username and Password” permission. This permission is not enabled for any Editor role on upgrade to version 8.2.



## Quick Links to Search Pages

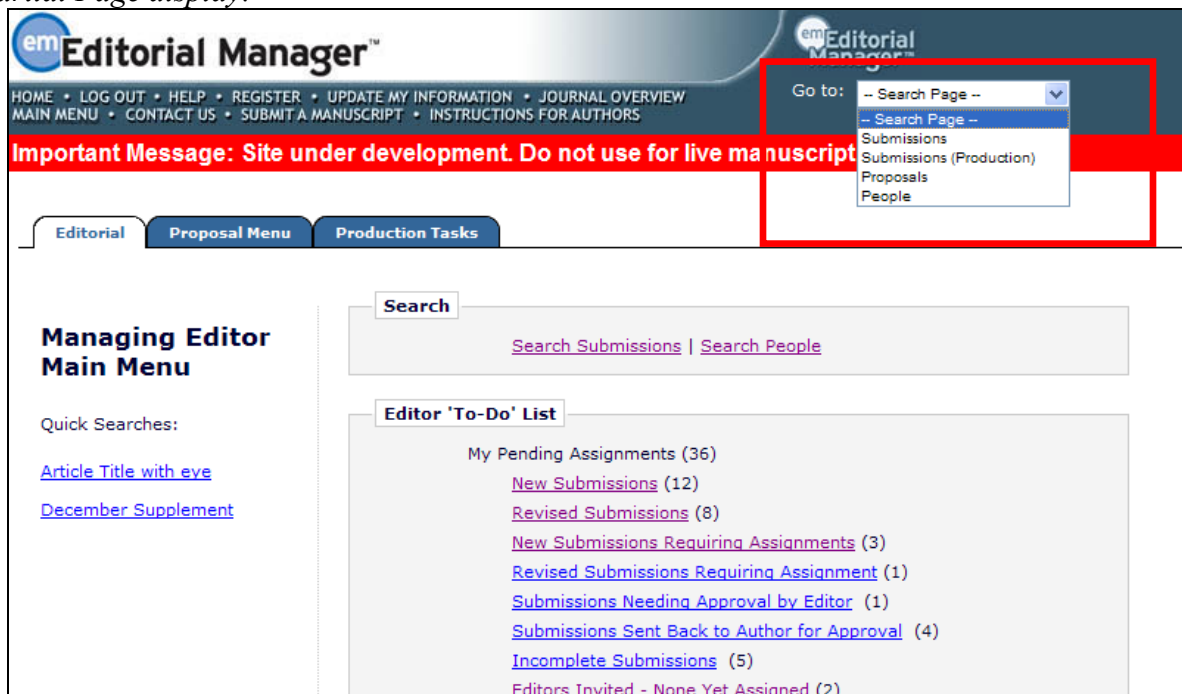
EM/PM provides users (with proper permission) links to *Search Submissions*, *Search Proposals*, and *Search People*. These links are located on the Main Menus, but there are times when users may wish to navigate to a Search page without having to navigate to the Main Menu first.

In EM/PM version 8.1, Publications could configure a ‘Go To’ list for Editors, allowing them to navigate between Publications using a drop-down menu in the main navigation panel. New in EM/PM version 8.2, the ‘Go To’ drop down is enhanced to include “quick links” to the following pages:

- Submissions – Search Submissions, Editorial
- Submissions (Production) – Search Submissions, Production
- Proposals – Search Proposals
- People – Search People

A user with any of the search permissions will now see the ‘Go to:’ drop-down, even if the Publication does not use the Cross-Publication Login feature.

*Partial Page display:*



The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with the 'em Editorial Manager' logo and a 'Go to:' dropdown menu. The dropdown menu is open, showing options: -- Search Page --, Submissions, Submissions (Production), Proposals, and People. Below the navigation bar, there is a red banner with the text 'Important Message: Site under development. Do not use for live manuscript'. The main content area is divided into two columns. The left column contains a 'Managing Editor Main Menu' with 'Quick Searches' and links for 'Article Title with eye' and 'December Supplement'. The right column contains a 'Search' section with links for 'Search Submissions' and 'Search People', and an 'Editor 'To-Do' List' with various tasks and counts, such as 'My Pending Assignments (36)', 'New Submissions (12)', 'Revised Submissions (8)', 'New Submissions Requiring Assignments (3)', 'Revised Submissions Requiring Assignment (1)', 'Submissions Needing Approval by Editor (1)', 'Submissions Sent Back to Author for Approval (4)', 'Incomplete Submissions (5)', and 'Editors Invited - None Yet Assigned (2)'.

For Publications using the existing Cross-Publication Login feature, users configured with both search permissions a ‘Go To Publication’ list will see the “Go to” list display with the ‘Search Page’ section first, followed by the ‘Publication’ list. For example:

-- Search Page --  
Submissions  
Submissions (Production)  
Proposals  
People  
-- Publication --  
JXYZ  
JPRS

Users will see only the appropriate items for their permissions; users with neither search permissions nor a list of 'Go To' Publications will not see the 'Go to:' drop-down at all.

#### TO CONFIGURE:

No configuration is required to use this feature. The drop-down menu will appear if the user is configured with one or more 'Go To' Publications, or is logged in under an Editor Role with one or more of the following Editor RoleManager 'Search...' permissions:

1. 'Search All Manuscripts'
2. 'Search Only Assigned Manuscripts'
3. 'Search All Proposals'
4. 'Search People'



## Enhancements to Remove Submission Feature

In EM/PM version 8.1, Editors were able to remove submissions from a number of folders, but they were not able to customize the letter sent to the Author to provide the Author with information as to why this submission was being removed.

New in EM/PM version 8.2, the Remove Submission feature is enhanced to allow the letter sent to be customized at the time the submission is removed.

The Remove Submission link appears in the following Editor folders:

1. New Submissions
2. New Submissions Requiring Assignment
3. Submissions Sent Back to Author
4. Incomplete Submissions
5. Submissions Waiting for Author's Approval
6. Production Initiated – No Tasks Assigned
7. Search Submissions – Search Results
8. Transferred Submissions

The link appears until:

1. A manuscript number has been assigned OR
2. A Discussion has been initiated using the Discussion Forum feature OR
3. An Ad Hoc e-mail has been sent in association with the submission by anyone other than the Corresponding Author

When the Remove Submission link is clicked from the *New Submissions* folder, *New Submissions Requiring Assignment* folder, *Production Initiated – No Tasks Assigned* folder, *Search Submissions – Search Results*, or *Transferred Submissions* folder, the Editor sees the existing “Are you sure you want to remove this submission?” warning. Upon clicking ‘OK’, the Editor is now brought to a new *Customize Removed Submission Letter* page.

**Customize Editor Removed Submission Letter**

**Star Clarke (Author)**

[Cancel](#) [Preview Letter](#) [Send](#)

<b>From:</b>	"The Journal of Information Architecture" <admin@edmgr.inform.com>
<b>To:</b>	<a href="#">Star Clarke</a>
<b>Letter Purpose:</b>	Editor Removed Submission
<b>Letter Subject:</b>	<input type="text" value="Your manuscript was removed"/>

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

**cc: bcc:**

Co-Authors

All Co-Authors with known e-mail addresses

**cc:**

**bcc:**

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

Ref.: Ms. No. %MS\_NUMBER%  
 %ARTICLE\_TITLE%  
 %JOURNALFULLTITLE%

Dear %TITLE% %LAST\_NAME%,

We have removed your paper from our submission queue because it is not within our subject matter purview.

Regards

%EDITOR\_NAME%  
 %EDITOR\_ROLE%  
 %JOURNALFULLTITLE%

[Cancel](#) [Preview Letter](#) [Send](#)

When the letter is sent (by clicking 'Send'), the Editor is shown the Removal confirmation page, and the submission is removed from the system.

**Remove Submission**

"Migration habits of prawns" has been removed.

[Return to New Submissions](#)  
[Main Menu](#)

**TO CONFIGURE:**

To use the new 'Customize Removal Letter' feature, go to ActionManager, Author Letters, and select a letter for the event 'Editor - Remove Submission'. To create a new letter for this Event, go to PolicyManager, Edit Letters, and add a new letter to the 'General' letter family.

*Partial page; ActionManager, Author Letters page:*

Editor Receives Submission	
Event	Author Letters
New Submission Sent to Publication	Author Submits New Manuscript Confirmation <input type="button" value="v"/>
New Child Submission Sent to Publication	NONE <input type="button" value="v"/>
Revised Submission Sent to Publication	Author Submits Revision Confirmation <input type="button" value="v"/>
Submission Transferred to Publication	NONE <input type="button" value="v"/>
Notify Other Authors	Other Authors - Request Confirmation <input type="button" value="v"/>
Editor - Remove Submission	Editor Remove Submission <input type="button" value="v"/>



## Allow Co-Authors to be CC'd on Letters to Corresponding Author

In EM/PM version 8.1, Publications may request that e-mail addresses be submitted for any Co-Author identified by the Corresponding Author during submission of a paper. New in EM/PM version 8.2, Publications may now configure certain letters so that these Co-Authors are CC'd on letters to the Corresponding Author.

When a letter is configured with the new 'Automatically CC: all Co-Authors' option (such as an Ad Hoc Letter to the Author), then any Co-Authors identified on the submission (with an e-mail address provided) will be sent a copy of the e-mail letter.

NOTE: This feature does not require that Co-Authors be required to verify and/or register with the Publication.

*Partial page display; Customize Letter with 'Automatically CC Co-Authors' configured:*

**Customize Letter - Question for Author**

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page.

Cancel Preview and Send

From: "Mary Smith" <bhopkins@ariessys.com>  
To: Corresponding Author;  
Letter Subject: Question for Author

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank box next to cc: or bcc, as appropriate. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:  Co-Authors

cc:

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

This is a letter regarding your submission.

Please update your Alternate Contact Information:  
%UPDATE\_ALT\_CONTACT\_INFO%

When a letter is configured with the new 'Display Checkbox to CC: all Co-Authors' option then when this letter is customized before sending (such as an Ad Hoc Letter to the Author), the user will have the option to CC all Co-Authors identified on the submission.

*Partial page display; Customize Letter with 'Allow CC Co-Authors' configured:*

**Customize Letter - Question for Author**

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page.

Cancel Preview and Send

From: "Mary Smith" <bhopkins@ariessys.com>  
To: Corresponding Author;  
Letter Subject: Question for Author

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank box next to cc: or bcc, as appropriate. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:  
 All Co-Authors with known e-mail addresses

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

This is a letter regarding your submission.  
Please update your Alternate Contact Information:  
%UPDATE\_ALT\_CONTACT\_INFO%  
Please let us know when you are not available to work on a task:  
%UPDATE\_UNAVAILABLE\_DATES%

**TO CONFIGURE:**

In PolicyManager, 'Edit Letters', select the letters to be modified with the new settings.

The new 'All Co-Authors' checkbox is added to the 'Automatic cc:' section of the following Letter Families:

- Ad Hoc from Author
- Ad Hoc from Editor
- Ad Hoc from Publisher
- Ad Hoc from Reviewer
- Author Invitation
- Author Reminder
- Batch E-mail
- Communications to Author
- Decision
- Fees And Payments
- General
- Production
- Production Reminder
- Terminate Assignment

The 'Display checkbox allowing cc: to Co-Authors' option (currently available in the 'Ad Hoc...' and 'Fees And Payments' Letter Families) is added to the following Letter Families:

- Author Invitation
- Author Reminder
- Communications to Author
- Decision
- General
- Production
- Production Reminder
- Terminate Assignment

Edit Letters *page; partial page display:*

### Edit 'Decision' Letter

Letter Purpose:

Subject:

Letter Family:

Sender's E-mail Address:  "The DEMO Journal" <trash1@ariessys.com>

Use Corresponding Editor's E-mail address  
 Use Corresponding Production Editor's E-mail address

**Additional Recipients**

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

**Automatically** cc: bcc:

All Co-Authors  
  Corresponding Editor  
  Corresponding Production Editor

**Allow choice on 'Send Letter' page:** The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:

Display checkbox for co-Authors

Letter Body:

```
# All lines beginning with a number sign (#)
# are comments and are not sent.
#
# This file must be in either DOS or
```

## Introduction of BCC Functionality on Letters

In EM/PM version 8.1, Publications have the option to configure certain letters to Carbon Copy (CC) users on letters. Those recipients receive a copy of the letter, with a notice at the top of the letter notifying them that they are a CC'd recipient.

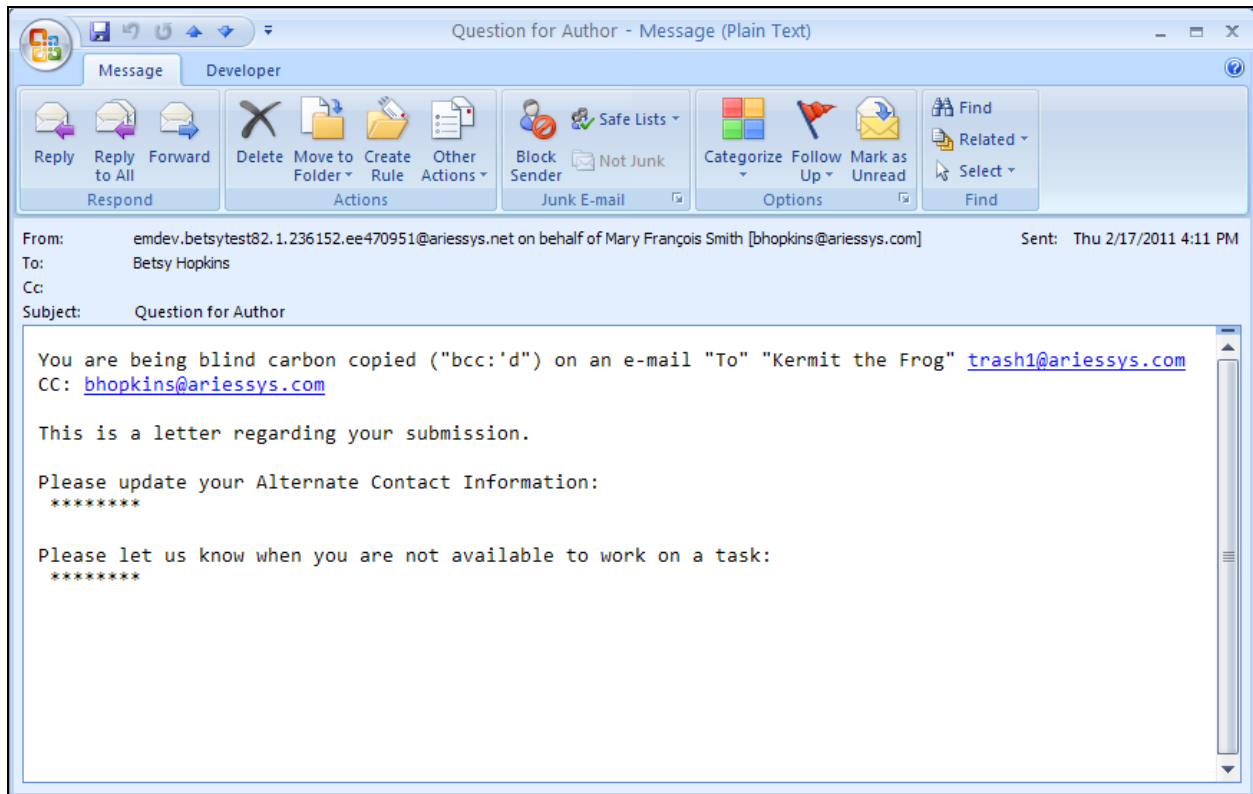
New in EM/PM version 8.2, Publications will now have the option to Blind Carbon Copy (BCC) users on letters. This feature is introduced for all letters where a CC option already exists.

To make it clear that a recipient has been Blind Carbon Copied, the following standard text is inserted at the top of the letter:

"You are being blind carbon copied ("bcc:'d") on an e-mail to [PRIMARY RECIPIENT]".

In the event there are CC'd recipients, an additional row is appended that reads:

“CC: [CC'd recipients]”



Any sensitive merge fields, such as deep links, usernames, or passwords, are replaced in the letter by asterisks.

NOTE: The BCC'd recipients are not displayed on the letter in 'History', however the list of BCC recipients is captured on the Correspondence History table in General Data Export.

Letters may be configured to automatically BCC a recipient, or to provide the sender with the option to BCC the recipient on *Customize Letter* pages. When the letter is configured to Automatically BCC a recipient, the recipient row displays on the Customize Letter with a checkmark image, denoting that these users will be automatically BCC'd. When the letter is configured to allow the sender to select a BCC, then there is a checkbox next to the designated recipient type on the *Customize Letter* page.

*Sample Ad Hoc from Author letter; Letter configured to automatically BCC the Corresponding Editor, and provide the sender with the option to either CC or BCC Co-Authors:*

**Customize Letter - Author Query to Journal**

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page.

Cancel Preview and Send

From: "Anthony Author" <bhopkins@ariessys.com>  
 To: "The DEMO Journal" <trash1@ariessys.com>;  
 Letter Subject: Query to Journal

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank box next to cc: or bcc, as appropriate. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: bcc:  
 Editor-in-Chief  
  All Co-Authors with known e-mail addresses

cc:   
 bcc:

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

# All lines beginning with a number sign (#)  
 # are comments and are not sent.

**TO CONFIGURE:**

The new 'BCC' option is available for all letters where the existing 'CC' option is available. Recipients may be configured to be automatically BCC'd, or a letter may be configured to allow the sender to select BCC recipients on the related 'Customize Letter' page.

To configure this option for letters, go to PolicyManager, Edit Letters, and either Edit an existing letter or Add a new letter. The specific options available vary based on the Letter Family selected.



Sample page; General letter family:

**Edit 'General' Letter**

Letter Purpose:

Subject:

Letter Family:

Sender's E-mail Address:  "The DEMO Journal" <trash1@ariessys.com>

Use Corresponding Editor's E-mail address

Use Corresponding Production Editor's E-mail address

**Additional Recipients**

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

**Automatically** cc: bcc:

All Co-Authors

Corresponding Editor

Corresponding Production Editor

**Allow choice on 'Send Letter' page:** The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:   Display checkbox for co-Authors

Letter Body:

```
# All lines beginning with a number sign (#)
# are comments and are not sent.
```

Sample page; Ad Hoc From Editor letter family:

**Edit 'Ad Hoc From Editor' Letter**

Custom Instructions:

[View Default Instructions](#) [Revert to Default Instructions](#)

Letter Purpose:

Subject:

Letter Family:

Recipient:  "The DEMO Journal" [trash1@ariessys.com](mailto:trash1@ariessys.com)

Corresponding Editor

Corresponding Production Editor

Display text box so sender can insert an e-mail address

Display the following e-mail address for the recipient:  
(Multiple addresses may be entered, separated by a semicolon)

First Assigned Editor

Handling Editor

Editor who made the first Editor assignment

All Reviewers of the current revision of the submission

Corresponding Author

**Additional Recipients**

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

**Automatically cc: bcc:**

All Co-Authors

Corresponding Editor

Corresponding Production Editor

Send copies to the following addresses  
(Multiple addresses may be entered, separated by a semicolon)

cc:

bcc:

**Allow choice on 'Send Letter' page:** The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:

Display checkbox for co-Authors

Display checkbox for Reviewers assigned to current Revision

Display checkbox for Editors assigned to current Revision

Display e-mail entry box on 'Send Letter' page:

cc:(Allow sender to manually enter cc recipients)

bcc:(Allow sender to manually enter bcc recipients)

Allow attachments

Letter Body:

## Attach Files to Ad Hoc Letters

Letters are used throughout EM/PM to communicate information specific to submissions. New in EM/PM version 8.2, Ad Hoc letters are enhanced to allow users to attach files to the letter, from both submission files and personal files.

When an Ad Hoc letter is configured to allow attachments, then the sender of the letter will see a new 'Add/Change Attachments' button on the *Customize Letter* page.

*Partial page display; new button featured:*

**Customize Letter - Author Query to Journal**

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page.

From: "Anthony Author" <bhopkins@ariessys.com>  
To: "The DEMO Journal" <trash1@ariessys.com>;  
Letter Subject: Query to Journal

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank box next to cc: or bcc, as appropriate. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: bcc:  
 Editor-in-Chief  
  All Co-Authors with known e-mail addresses

cc:   
bcc:

Letter Body:

# All lines beginning with a number sign (#)  
# are comments and are not sent.  
#

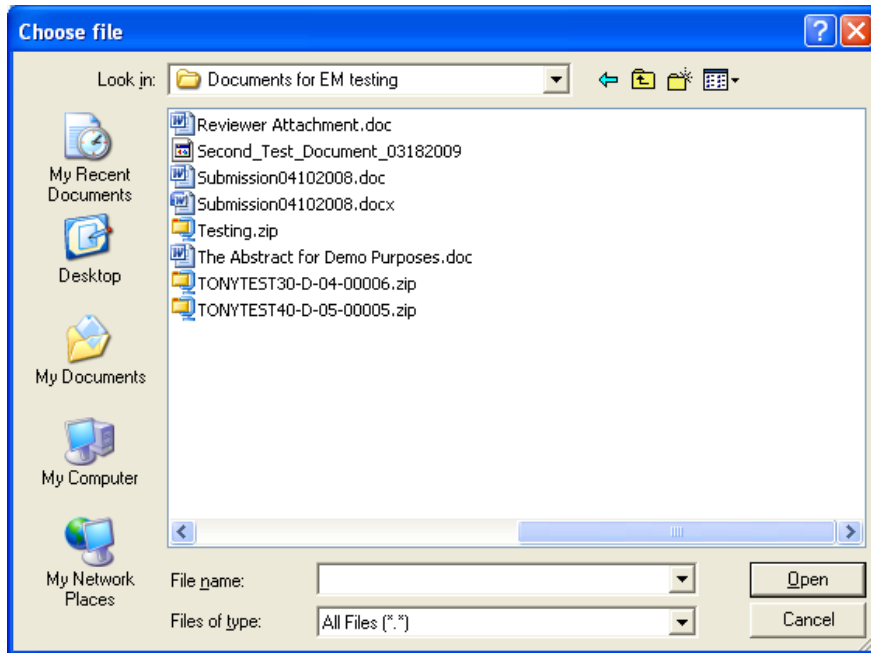
Clicking this button will open a window where the user may upload an attachment from their local computer by clicking the 'Browse' button and choosing the file to be added.

**Select Files**

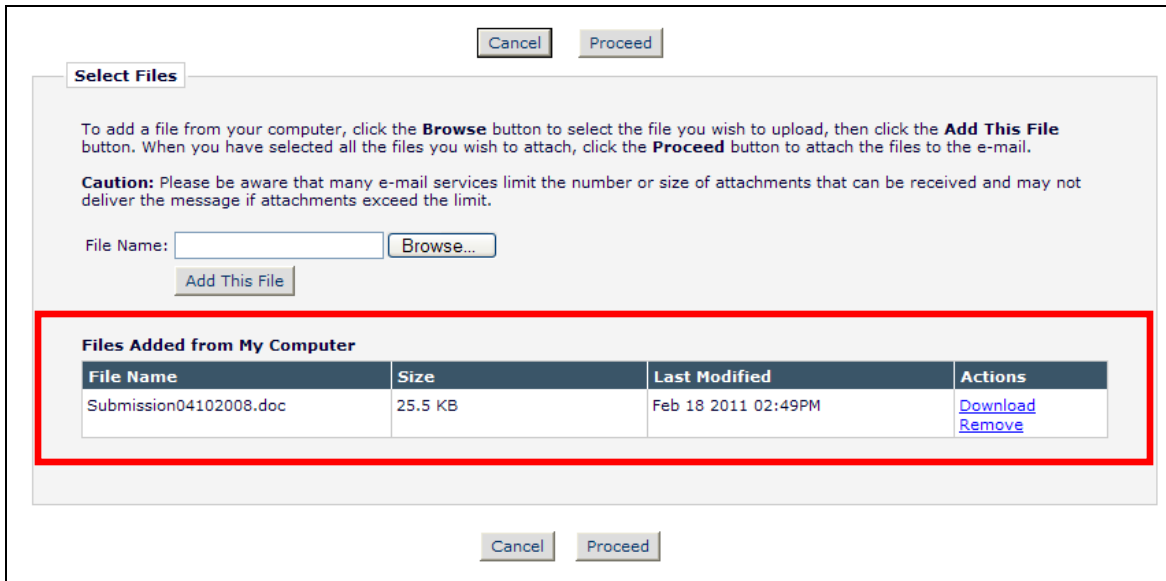
To add a file from your computer, click the **Browse** button to select the file you wish to upload, then click the **Add This File** button. When you have selected all the files you wish to attach, click the **Proceed** button to attach the files to the e-mail.

**Caution:** Please be aware that many e-mail services limit the number or size of attachments that can be received and may not deliver the message if attachments exceed the limit.

File Name:



Once the file is selected for inclusion, the user will see the standard EM/PM “busy bar”, showing that the file is being uploaded. When the upload is complete, the attached file will display in a grid on the page.



The user may continue to add as many files as desired.

NOTE: The attachment file size is limited by the Publication’s configured limit for Submission Items, set in PolicyManager on the *Set Maximum Size of Uploaded File* page.

NOTE: Many e-mail services limit the number or size of attachments.

If the logged-in user is an Editor or Publisher with permission to access the submission’s File Inventory, a section labeled “Add Files from Submission Inventory” displays. This section is collapsed initially, and clicking the ‘plus’ sign expands the section. Once expanded, submission files display in the following groups (as applicable). Sections only appear if there is at least one file to display in that section:

- A. System PDF
- B. Submission Files
- C. Companion Files
- D. Schedule Group Files
- E. Editor/Reviewer Attachments

*Sample page with files available for selection:*

Cancel Proceed

**Select Files**

To add a file from your computer, click the **Browse** button to select the file you wish to upload, then click the **Add This File** button. When you have selected all the files you wish to attach, click the **Proceed** button to attach the files to the e-mail.

**Caution:** Please be aware that many e-mail services limit the number or size of attachments that can be received and may not deliver the message if attachments exceed the limit.

File Name:  Browse...

Add This File

**Add Files from Submission Inventory**

Select the checkbox next to the file(s) you would like to attach.

[Submission Files](#) | [Submission Companion Files](#)

**System PDFs**

A System PDF is the copy of the submission when the "View Submission" link is clicked. Depending on configuration, the Reviewer version and Editor/Author version may not contain the same items.

Select	Submission Revision	PDF Version	Size	Last Modified
<input type="checkbox"/>	Original	Editor/Author Version	1.1 MB	Nov 19 2003 04:48PM
<input type="checkbox"/>	Original	Reviewer Version	1.1 MB	Nov 19 2003 04:48PM

**Submission Files** [Top](#)

Select	File Name	Description	Item	Size	Last Modified
<input type="checkbox"/>	Manuscript.txt	* Manuscript	Manuscript	11.8 KB	Jun 12 2001 08:47AM

**Submission Companion Files** [Top](#)

Select	File Name	Description	Item	Size	Last Modified
<input type="checkbox"/>	Undo Analysis.doc	Sample Companion File	Companion File	43.5 KB	May 25 2011 11:25AM

Cancel Proceed

The user may select/check the file(s) to be attached to the e-mail that is sent.

When the user is done adding and selecting files, clicking the 'Proceed' button returns the user to the *Customize Letter* page. The attached files now display above the 'Add/Change Attachments' button.

**Customize Letter - Author Query to Journal**

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page.

From: "Anthony Author" <bhopkins@ariessys.com>  
To: "The DEMO Journal" <trash1@ariessys.com>;  
Letter Subject: Query to Journal

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank box next to cc: or bcc, as appropriate. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: bcc:  
 Editor-in-Chief  
  All Co-Authors with known e-mail addresses

cc:   
bcc:

Attachments: [Submission04102008.doc](#)

Letter Body:

# All lines beginning with a number sign (#)  
# are comments and are not sent.

If the user clicks the 'Add/Change Attachments' button again, any files already attached are listed in the file table in the order they were attached. If the user deselects or removes any previously attached files and clicks 'Proceed' on the *E-mail Attachment Upload* page, they are removed from the letter.

When the letter is ready to be sent, clicking the 'Preview and Send' button presents the user with a preview of the letter, with any selected attachments listed at the top of the page.



Clicking 'Send E-Mail' sends the letter. Because it may take some time for large attachments to send, an interim message is displayed on the page until the process is complete.



Ad Hoc letters sent with attachments are displayed in 'History' with a paperclip icon to denote an attachment.

CORRESPONDENCE HISTORY						
Add Editorial Correspondence						
Correspondence Date	Letter	Recipient	Status	Revision	Operator	
Feb 18 2011 4:42PM	<a href="#">Editor Query to other Editors</a>	Edward Editor, MD	Under Peer Review	1	Mary François Smith, PhD	
Feb 18 2011 4:42PM	<a href="#">Editor Query to other Editors</a>	Edward Editor, MD	Under Peer Review	1	Mary François Smith, PhD	
Feb 18 2011 4:42PM	<a href="#">Editor Query to other Editors</a>	Edward Editor, MD	Under Peer Review	1	Mary François Smith, PhD	
Nov 24 2009 2:03AM	<a href="#">Editor's Reviewer uninvited notice</a>	Mary François Smith, PhD	Under Peer Review	1	Edward Editor, MD	
Nov 24 2009 2:03AM	<a href="#">Editor's Reviewer uninvited notice</a>	Edward Editor, MD	Under Peer Review	1	Edward Editor, MD	

**TO CONFIGURE:**

To enable use of E-mail Attachments, contact your Aries representative. Publications already using the Reviewer/Editor Attachments feature will have E-mail Attachments enabled on upgrade to version 8.2.

When Attachments are enabled for the Publication, a new 'Allow Attachments' option is available on all letters in the Ad Hoc letter families:

- Ad Hoc from Author
- Ad Hoc from Editor
- Ad Hoc from Publisher
- Ad Hoc from Reviewer
- Ad Hoc for Proposal

### Add 'Ad Hoc From Editor' Letter

The Custom Instructions will display to the sender on the page where the letter is sent. To change them, make changes in the 'Custom Instructions' box and click the 'Save' button.

Custom Instructions:

[View Default Instructions](#)      [Revert to Default Instructions](#)

Letter Purpose:

Subject:

Letter Family:

Recipient:  "The DEMO Journal" [trash1@ariessys.com](mailto:trash1@ariessys.com)

Corresponding Editor

Corresponding Production Editor

Display text box so sender can insert an e-mail address

**[portion of page unchanged]**

Display e-mail entry box on 'Send Letter' page:

cc:(Allow sender to manually enter cc recipients)

bcc:(Allow sender to manually enter bcc recipients)

Allow attachments

Letter Body:



## Add Attachments to External Correspondence

In EM/PM version 8.1, Editors may be given permission to manually add External Correspondence entries (an item of correspondence, such as an e-mail, received outside of the EM/PM system) to the History of a submission, where they can be viewed alongside EM/PM-generated Internal Correspondence. New in version 8.2, Editors may be given permission to add Attachments to an External Correspondence record.

If the ‘Attachments’ feature is enabled for the Publication and the logged-in Editor has the new “Add Attachments to External Correspondence” permission enabled, a new ‘Attachments’ option appears just above the ‘Letter Contents’ area of the *Add External Correspondence* page.

**Add External Editorial Correspondence**

Items marked with an asterisk are required. The 'Correspondence Date' and 'Description' fields will be listed on the History page. Paste or type any desired text into the 'Letter Body' area, but note that any formatting will be lost. Click 'Open in New Window' if you need extra space to edit the correspondence.

Note: Please check the text for any sensitive information that should be removed or obscured (such as passwords or names of reviewers), as the system cannot automatically anonymize correspondence you add manually.

\* Correspondence Date:  (mm/dd/yyyy) Time: Hour:  Minute:  AM/PM:  U.S. Eastern Time

\* Description:

From:

To:

Letter Subject:

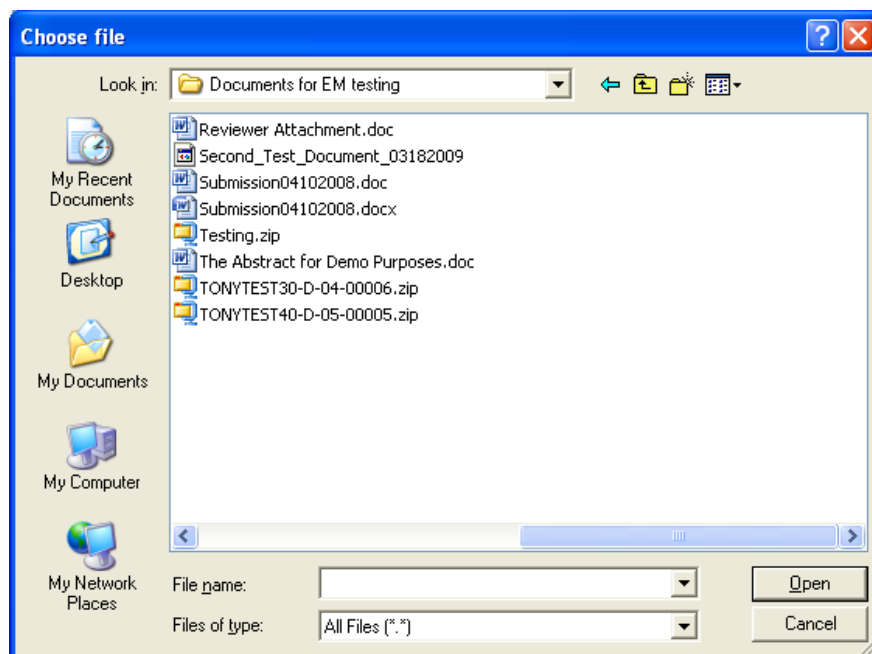
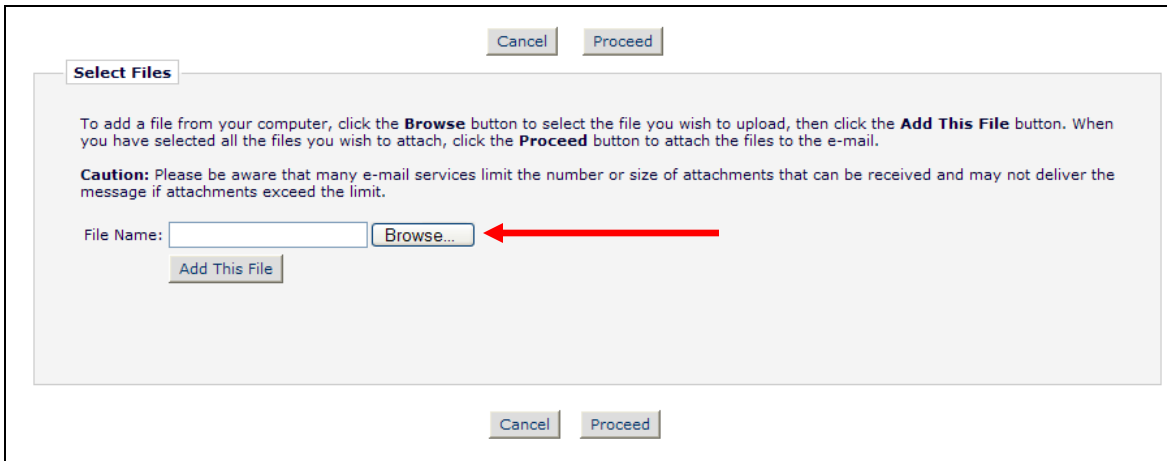
Attachments:

Letter Contents:

[Insert Special Character](#)

Clicking this button will open a window where the user may upload an attachment from their local computer by clicking the ‘Browse’ button and choosing the file to be added.

NOTE: When an attachment has been sent to the Publication via e-mail, the Editor will have to save the attachment to a local drive in order to upload it using this feature.



Once the file is selected for inclusion, the user will see the standard EM/PM “busy bar”, showing that the file is being uploaded. When the upload is complete, the attached file will display in a grid on the page.

**Select Files**

To add a file from your computer, click the **Browse** button to select the file you wish to upload, then click the **Add This File** button. When you have selected all the files you wish to attach, click the **Proceed** button to attach the files to the e-mail.

**Caution:** Please be aware that many e-mail services limit the number or size of attachments that can be received and may not deliver the message if attachments exceed the limit.

File Name:

**Files Added from My Computer**

File Name	Size	Last Modified	Actions
Submission04102008.doc	25.5 KB	Feb 18 2011 02:49PM	<a href="#">Download</a> <a href="#">Remove</a>

The user may continue to add as many files as required.

NOTE: The attachment file size is limited by the Publication's configured limit for Submission Items, set in PolicyManager on the *Set Maximum Size of Uploaded File* page

When the user is done adding and selecting files, clicking the 'Proceed' button returns the user to the *Add External Correspondence* page. The attached files now display above the 'Add/Change Attachments' button.

### Add External Editorial Correspondence

\* One or more required fields indicated by an asterisk are not filled in. Please return and check the information you have entered.

Items marked with an asterisk are required. The 'Correspondence Date' and 'Description' fields will be listed on the History page. Paste or type any desired text into the 'Letter Body' area, but note that any formatting will be lost. Click 'Open in New Window' if you need extra space to edit the correspondence.

Note: Please check the text for any sensitive information that should be removed or obscured (such as passwords or names of reviewers), as the system cannot automatically anonymize correspondence you add manually.

\* Correspondence Date:  (mm/dd/yyyy)      Time: Hour:  Minute:  AM/PM:  U.S. Eastern Time

\* Description:

From:

To:

Letter Subject:

Attachment(s): [Submission04102008.doc](#)


Letter Contents:

[Insert Special Character](#)

If the user clicks the ‘Add/Change Attachments’ button again, any files already attached are listed in the file table in the order they were attached. If the user removes any previously attached files and clicks “Proceed” on the *E-mail Attachment Upload* page, they are removed from the correspondence record.

Clicking ‘Submit’ on the *Add External Correspondence* page saves the letter to Correspondence History. External correspondence added with attachments are displayed in ‘History’ with a paperclip icon to denote an attachment.

*Partial page display; external correspondence added:*

Feb 15 2011 9:48AM	<a href="#">Author Notice Editor Made Changes to Submission</a>	Anthony Author, MD	Sent Back to Author	0	Smith, PhD Mary François Smith, PhD
Feb 15 2011 10:54AM	<a href="#">Off-line Information Request (External)</a>  <a href="#">Remove</a> <a href="#">Edit</a>				Mary François Smith, PhD
Aug 25 2009 11:51AM	<a href="#">Editor Notice Author Approve Changes</a>	Mary François Smith, PhD	Received by Journal	0	[Proxied by Mary François Smith, PhD]
Aug 25 2009 11:51AM	<a href="#">PDF Built and Requires Approval</a>		Building PDF	0	Anthony Author, MD [Proxied by Mary François Smith, PhD]
Aug 25 2009 11:50AM	<a href="#">Author Notice Editor Made Changes to Submission</a>	Anthony Author, MD	Sent Back to Author	0	Mary François Smith, PhD

This feature is available for Editorial Correspondence, Production Correspondence, and Schedule Group Correspondence.

#### TO CONFIGURE:

To enable use of E-mail Attachments, contact your Aries representative. Publications already using the Reviewer/Editor Attachments feature will have E-mail Attachments enabled on upgrade to version 8.2.

When Attachments are enabled for the Publication, Editor roles will have a new RoleManager “Add Attachments to External Correspondence” sub-permission displayed beneath the existing “Add/Edit External Correspondence” permission.

## Edit Role Definition

Role Name:

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. By holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking in the lists of decision terms, you may select or deselect multiple terms.

[Expand All](#)

[Collapse All](#)

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- System Conversion Tasks
- General Searching and Viewing

Use Editorial Details Layout

- Search All Manuscripts
- Search Only Assigned Manuscripts
- Share Saved Searches

**[portion of page unchanged]**

- View Editorial Status History
- View Submission Production Status History
- View Submission Production Task Assignment History
- View Schedule Group Production Task Assignment History
- View Editorial Correspondence History
- View Submission Production Correspondence History
- View Schedule Group Production Correspondence History
- Add/Edit External Correspondence
  - Add Attachments to External Correspondence
- View All Submissions
- View Completed Reviews Grid in Main Menu
- View Additional Manuscript Details
- Edit Additional Manuscript Details

## Automated Author Reminders

In EM/PM version 8.1, Publications can send e-mail reminders to Authors manually by using one of two Author Reminder Reports that relate to submission revision: *Author Revision Status Report* and *Author Revision Reminder Report*. On the report results page the user can select the ‘Send Reminder’ checkbox next to the appropriate Author names, and proceed through the reminder sending process. Reminders from these reports can be scheduled to be sent at a date/time in the future.

New in version 8.2, a new *Automated Author Revision Reminder Report* is introduced for Editors with a new ‘Create Automated Author Revision Reminders’ permission enabled. This report automates the existing *Author Revision Status Report* and *Author Revision Reminder Report* criteria. When created, this report will send automated reminders (i.e. the report does not need to be run manually in order for the reminder to be scheduled). This permission is disabled / not selected on upgrade to v8.2.

Users with the existing ‘Produce Reports’ permission and the new ‘Create Automated Author Revision Reminders’ permission will see the Automated Author Revision Reminder Report link on the *Reports Menu*.



Users with the existing ‘Send Author Reminders’ permission and the new ‘Create Automated Author Revision Reminders’ permission will see the Automated Author Revision Reminder Report link on the *Send Reminder Letters* page (accessible from the Editorial Main Menu).

**Send Reminder Letters**

Click a link below to access the reminder report, from which reminder letters can be sent.

**Author Reminder Reports**  
[Author Revision Status Report](#)  
[Author Revision Reminder Report](#)  
[Automated Author Revision Reminder Report](#)

**Invited Author Reminder Reports**  
[Authors Invited - No Response](#)  
[Author Invitation Status Report](#)

**Editor Reminder Reports**  
[Assignment Status Report](#)  
[New Assignments Report](#)  
[Required Reviews Complete Report](#)

**Reviewer Reminder Reports**  
[Reviewer Invited - No Response Report](#)  
[Reviewer Reminder Report](#)  
[Automated Reviewer Reminder Report](#)

Clicking the [Automated Author Revision Reminder Report](#) link from either page takes the user to the new page of the same name, where reminder definitions can be set up to send e-mail reminders in the following scenarios:

- Outstanding Revisions - Reminders will be sent to Authors where the Author was asked to submit a revision X days ago (where X = the value entered in the box), but the Author has not declined, nor has the Author submitted the revision.
- Reminder Before Revision Due Date - Reminders will be sent to Authors who agreed (have started a revision) but have not yet submitted it, and the revision due date is in X days (where X = the value entered in the box).
- Reminder Past Revision Due Date – Reminders will be sent to Authors who were asked to revise their submission, but have not submitted their revision or declined to revise, where the Revision was due X days ago (where X = the value entered in the box).

The selection criteria can be further refined by a particular Editor (First Assigned, or First Decision), Article Type or Section/Category. When creating an Automated Reminder definition, a Reminder Name is required, and the Reminder Letter that will be sent must be selected. All letters in the Author Reminder Letter Family are available for selection in the Reminder Letter drop-down list.

### Automated Author Revision Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Author Revision reminder e-mails will be sent once every 24 hours to each recipient.

**Reminder Type:**

- Outstanding Revisions:** Send an automated reminder e-mail to Authors who were asked to revise their submission exactly  days ago. If Authors have already submitted their revision or have declined to revise, they will not receive a reminder.
- Reminder Before Revision Due Date:** Send an automated reminder e-mail for revisions that are exactly  days before their due date. Reminders will be sent to Authors who have agreed to submit a revised manuscript but have not yet submitted their revision.
- Reminder Past Revision Due Date:** Send an automated reminder e-mail for revisions that are exactly  days past the due date. To send reminders for revisions that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who were asked to revise their submission, but have not submitted their revision or decline to revise.

**First Assigned Editor:** (All Editors)

**Editor Who Made First Decision:** (All Editors)

**Reminder Name:**   
Maximum 200 characters

**Reminder Letter:** Please Choose an Automated Reminder Letter

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

**Article Type:** Original Study   
Letter to the Editor   
Perspective   
Rapid Communication

**Section/Category:** December Supplement (hidden)   
Primer (hidden)   
January Supplement (hidden)   
Demonstration Category

**Saved Automated Reminders**

Click 'Remove' if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click 'Edit' to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them.

There are currently no saved automated reminders.

[Return to Reports](#)  
[Return to Editorial Menu](#)

Once an Automated Reminder is created and saved, it is listed at the bottom of the page. The user who created the Automated Reminder is the only user who can remove (stop running) that reminder or edit the criteria. However, all Editors can see the complete list of Automated Reminders that have been created on this page. To stop an Automated Reminder from running, simply click the Remove link.

*Partial page display; navigation links at the bottom changed based on the location from which the Automated Author Revision Reminder Report page was accessed:*

**Saved Automated Author Revision Reminders**

Click 'Remove' if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click 'Edit' to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them.

All Revisions Requested 14 Days ago	Ed J Editor, MD	<a href="#">Remove</a>	<a href="#">Edit</a>
Revisions Due Tomorrow	Ed J Editor, MD	<a href="#">Remove</a>	<a href="#">Edit</a>
Revision is 5 days late	Emily L Editor, MD		
Revision Due in December	James M Hackman, MD		

[Return to Reports](#) [or [Return to Send Reminders](#)]  
[Return to Editorial Menu](#)



A batch process runs all saved Automated Reminder definitions once in each 24 hour period. If the Publication wishes to send multiple reminders, multiple Automated Reminder Definitions can be saved (e.g. a reminder for 15 days before the due date, a separate reminder for 10 days before the due date, and another reminder for 5 days before the due date). Each saved reminder can have its own letter associated with it.

NOTE: The nightly batch process runs between 12:00am and 4:00am US Eastern Time.

Some notes about Automated Author Revision Reminders:

1. The reminder queries retrieve records that meet the criteria exactly. For example, a reminder that stipulates a reminder to be sent "if the revision is exactly 10 days past the due date", does not generate a reminder on day 11, day 12, day 13 etc.
2. Users that have the 'Restrict Reminder Reports to Assigned Submissions' permission enabled are also able to save automated reminder criteria, triggering the creation of batch automated reminders that are delivered only to Authors associated with their assigned submissions.
3. If the Editor who saved the reminder is 'blinded' to a submission that matches the Automated Reminder criteria, no automated reminder e-mail will be sent (this is to resemble what would happen if the Editor were manually running an *Author Revision Reminder* report, where they would not see any submission to which they are blinded).
4. Reminders sent from the *Automated Author Revision Reminder Report* increment the reminder count fields in the database.
5. All automated reminder letters are written to the Correspondence History, following the logic used for the manual reminder letters.

TO CONFIGURE:

In RoleManager, select the Editor role(s) that will be allowed to create Automated Author Revision Reminders, and select/check the 'Create Automated Author Revision Reminders' permission. Make sure the Editor Role also has either 'Produce Reports' permission or 'Send Author Reminders'; otherwise they will not be able to access the Automated Author Revision Reminder Report.

**Administrative and Reporting Functions**

System Administration Functions

Unrestricted Access

Restricted Access

Produce Reports

Schedule Reports

Run Cross-Publication Reports

Create Automated Reviewer Reminders

Send Reviewer Reminders

Send Editor Reminders

Create Automated Author Revision Reminders

Send Author Reminders

Restrict Reminder Reports to Assigned Submissions

Search/Manage Conference Submissions

Initiate Rebuttal

Set Final Disposition

## Automated Editor Summary Reminders

New in EM/PM version 8.2, Publications may create Automated Editor Summary Reminders to send out 'To Do' Lists to Editors on a regular basis. Editors with permission to receive assignments are eligible to receive these Reminders. These reminders can be configured to send Editors e-mail summaries of the total number of outstanding assignments in up to three categories:

- New Invitations
- New Assignments
- Submissions with Required Reviews Complete

Each category in the reminder can display counts of items in each folder and 'days outstanding' figures using new merge fields. Each Editor receives a single e-mail summarizing the assignments in these key folders, not a single e-mail per assignment. A new deep link can be supplied which logs the Editor into the system and takes them to their Editorial Main Menu. The reminders can be used to prompt Editors to log in to EM to address the assignments that need attention.

A typical Summary Reminder may be configured to look like this (merged data displayed in {brackets}):

**Editor Assignments Summary 12/10/2010**  
You replied on 12/12/2010  
The Journal of X, Y and Z  
**Sent:** 12/10/2010  
**To:** jsmith@emtesting.co.uk  
**Cc:**

Dear Professor Smith,

Here is a summary of key folders in your Editorial Manager To-Do list. You have been sent this summary because some of these items may require your attention:

New Invitations ({0}); longest elapsed time {0} days.  
New Assignments ({3}); longest elapsed time {7} days.  
Submissions with Required Reviews Complete ({5}); longest elapsed time {2} days.

You may click this link to log in and view your main menu and To-Do list:  
[{Editor Main Menu}](#)

The Journal of X, Y and Z.

Each Role configured to receive Summary Reminders will receive them on a regular schedule (defined in PolicyManager). The base configuration always sends a single Summary E-mail to each Editor on the appropriate date, summarizing the current state of their To Do list. The e-mail is still sent even if there are no current assignments, as this may be a useful reminder for Editors who do not log into EM frequently.

More complex configuration options are available which allow Publications to set trigger criteria so that Editors only receive this summary of their To Do list when they have one or more assignments that need action. NOTE: The complete 'To Do' list summary is still sent, the criteria only defines when the letters are sent. Editors will need to log in to check which assignments need action.

Unlike Author or Reviewer reminders which can be configured by individual Editors (if they have the correct permissions), Automated Editor Summary Reminders are configured for the Publication as a whole by the system administrator in PolicyManager. Administrators may decide how often the report is run against each Editor Role. For example, if an Editor-in-Chief is configured to get a reminder report every 7 days, then every 7 calendar days every E-i-C will get a letter (as configured) displaying a count of items in each of the three folders (if the letter is configured with the new merge fields).

Reminders may be further configured to only send when there are specific items due. For example:

- If the **Editor Invitations Awaiting a Response** option is set/checked, then the reminder will be sent where the Editor has not accepted or declined an invitation, and the invitation was sent X or more days ago (where X is the numeric value configured for this criterion).
- If the **New Editor Assignments** option is set/checked, then the reminder will be sent where the Editor has been assigned to a Submission or has accepted an invitation X or more days ago (where X is the numeric value configured for this criterion), and where the Editor has not assigned/invited a lower-level Editor or Reviewer.
- If the **Required Reviews Complete** option is set/checked, then the reminder will be sent where the Editor is the Handling Editor of a submission, the required number of reviews has been met for the submission, and the 'Required Reviews Complete' status was reached X or more days ago (where X is the numeric value configured for this criterion).

There is only one set of criteria to apply to Summary Reminders. Individual Roles can be configured to either use the defined criteria (Editors only receive a summary e-mail when they have one or more assignments that meet the criteria), or not (Editors receive a summary e-mail every time the report is run).

Each night (between 12:00am and 4:00am US Eastern Time), the system runs a summary report for each Editor Role configured to receive automated reminders. For each Editor Role configured to run an Automated Editor Summary report, the system determines whether the report is due to run today based on the dates configured on the *Automated Editor Summary Reminders* page.

For reports linked to Editor Roles with 'Use Criteria' not selected/un-checked, the report sends all Editors with this Role a Summary E-mail every X days. It does not matter whether the Editor currently has any assignments or not, as the information that there are no assignments may be just as helpful as a reminder of pending assignments.

For Editor Roles with 'Use Criteria' selected/checked, the report runs a query based on all of the criteria selected under the Criteria section to see which Editors with that Role will receive an e-mail for today's run. In this case, receiving the e-mail is an indication that they need to log in to take some action.

Each Editor with matching criteria will receive a single e-mail from the system.

There are seven new merge fields, two associated with each folder plus a new Deep Link, that are intended for use in the Automated Editor Summary Reminder letters:

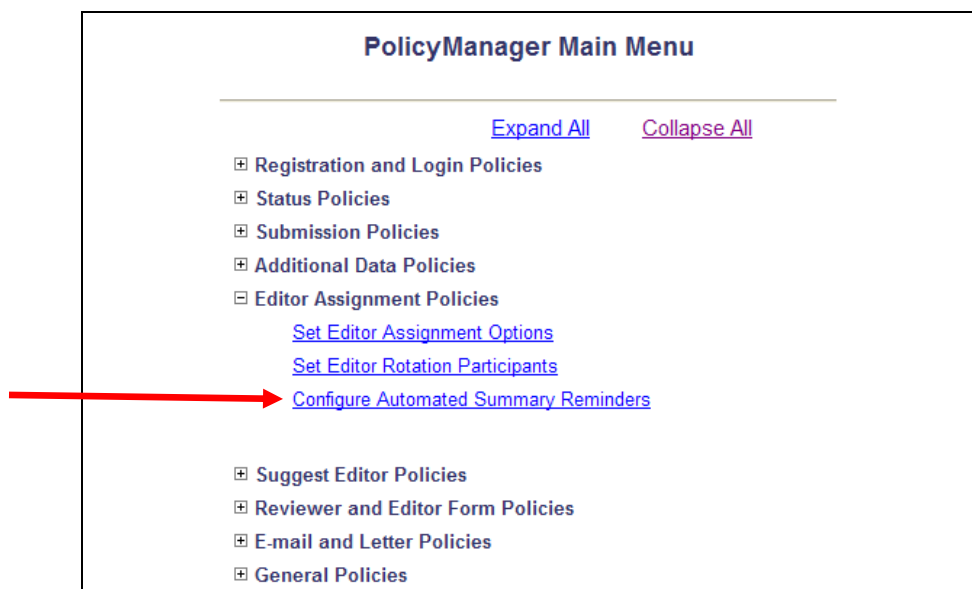
- 1) For New Invitations:
  - a) **%EDITOR\_NEW\_INVITATIONS\_TOTAL%** - inserts the total number of submissions in the recipient's 'New Invitations' folder on the Editor's Main Menu. If the recipient has no invitations, this displays '0' in the e-mail.
  - b) **%EDITOR\_NEW\_INVITATIONS\_DAYS%** - inserts a value equal to the largest number of days elapsed between the current date, and the date the Editor was invited, from all Editor assignments included in the recipient's New Invitations folder. If the recipient has no invitations, this displays '0' in the e-mail.
- 2) For New Assignments:
  - a) **%EDITOR\_NEW\_ASSIGNMENTS\_TOTAL%** - inserts the total number of submissions in the recipient's 'New Assignments' folder on the Editor's Main Menu. If the recipient has no New Assignments, this displays '0' in the e-mail.
  - b) **%EDITOR\_NEW\_ASSIGNMENTS\_DAYS%** - inserts a value equal to the largest number of days elapsed between the current date, and the date the Editor assignment started (was assigned, or the invitation was accepted), from all Editor assignments included in the recipient's New Assignments folder. If the recipient has no new assignments, this displays '0' in the e-mail.
- 3) For Submissions with Required Reviews Complete:
  - a) **%EDITOR\_REQUIRED\_REVIEWS\_COMPLETE\_TOTAL%** - inserts the total number of submissions in the Editor's 'Submissions with Required Reviews Complete' folder on the Editor's Main Menu. If the recipient has no submissions in this folder, this displays '0' in the e-mail.
  - b) **%EDITOR\_REQUIRED\_REVIEWS\_COMPLETE\_DAYS%** - inserts a value equal to the largest number of days elapsed between the current date, and the date the submission entered the recipient's Required Reviews Complete folder. If the recipient has no submissions in this folder, this displays '0' in the e-mail.

Additionally, users may use the new **%EDITOR\_MAIN\_MENU\_DEEP\_LINK%** merge field to provide Editor's with a deep link to their Editor Main Menu.

Although introduced to support Automated Editor Summary Reminders, all of these merge fields can be used in any letter that is sent to an Editor. For example, the new deep link (allowing Editors to log into their Editorial Main Menu) may be included in every notification letter to the Editor, and a copy of the supported ‘To Do List’ folders can be appended to the bottom.

#### TO CONFIGURE:

In PolicyManager, under ‘Editor Assignment Policies’, select the new [Configure Automated Summary Reminders](#) to configure the new feature.



The *Automated Editor Summary Reminders* page has two sections:

- **Role Settings**

This section displays a list of all Editor Roles which are configured with the Editor RoleManager ‘Receive Assignments’ permission. In this section, the Administrator determines which Role(s) are eligible to receive reminders by checking the ‘Send’ box next to the Role. For each selected Role, the Administrator will enter a “Frequency” that sets the interval, in days, that will elapse between successive Summary Reminder reports for this Editor Role. For example, an entry of “7” in this field for an Editor Role means Editors with this Role will receive this e-mail report every 7 days, or weekly.

The ‘Next Reminder Due’ field is used to define the next time this reminder should be delivered. For example, if upon initial set up of this reminder, the Publications wishes to send the first reminder on the first day of the month, then this date would be entered as April 1<sup>st</sup> (04-01-2011). The next report would be run on April 1<sup>st</sup>.

NOTE: Dates in the past are valid – if the current date is greater than or equal to the next Reminder Due date, the report will run once in the next 24 hours, and then revert to the configured schedule (set by Next Reminder Due + Frequency).

The 'Summary Letter' is the selection of the letter to be sent to the Editor. The available letters are those in the 'Editor Reminder' Letter Family.

The 'Use Criteria' check-box is related to the bottom section of the page. If left empty/not selected, all Editors with this Role automatically receive an e-mail each time the report is run. If selected/checked, Editors with this Role will only receive an e-mail if they have one or more assignments that match the criteria at the time the report is run. If they do not, they will not receive a Summary Reminder E-mail in that run.

NOTE: When they do receive a Summary Reminder E-mail, the letter will contain ALL open assignments, not just those that fit the criteria. The criteria is used only to determine when the letters are sent, not the contents of the letters.

Note that if an individual assignment meets the criteria and triggers the Summary Reminder E-mail, it will continue to do so in each reminder run until the Editor deals with that assignment and it no longer meets the criteria. For example, an Editor with a Role configured to 'Use Criteria' will continue to receive Summary Reminders at each scheduled run until they deal with all assignments that meet the trigger criteria.

- **Criteria**

This section lists the three types of query that can be used to filter out Editors for whom the reminder is not currently applicable. There is a single set of queries used for all Roles; individual Roles can be configured to use this set of criteria when Summary Reports are run as described above, or to ignore them.

If an option is selected/checked, then a value must be entered in the corresponding box. The following options are available for selection:

- **Editor Invitations Awaiting Response:** Include Editors who received an Invitation [ *X* ] or more days ago, but have not yet accepted or declined the invitation.  
This query looks for assignments in the 'New Invitations' folder, looking for invitations sent at least '*X*' days before the current date.
- **New Editor Assignments:** Include Editors who were assigned or accepted an Invitation [ *X* ] or more days ago, but have not yet invited reviewers or assigned the submission on to another Editor.  
This query looks in the 'New Assignments' folder, looking for assignments initiated (assigned or Invitations accepted) at least '*X*' days before the current date.
- **Required Reviews Complete:** Include Editors who are the Handling Editor, with submissions that reached Required Reviews Complete status [ *X* ] or more days ago and on which they have not yet submitted their recommendation/decision. A value of zero is permitted.

This query looks for assignments in the ‘Required Reviews Complete’ folder, looking for assignments which moved into this folder at least ‘X’ days before the current date.

**Automated Editor Summary Reminders**

If enabled for an Editor Role, Editor Summary Reminders are periodically sent to all such Editors with Assignments that meet the Reminder criteria and with the frequency defined below. Only Editor Roles that can receive assignments are listed below. To enable Summary Reminders for a Role, select the ‘Send’ checkbox and define a Frequency below, and select a letter to be sent. Enter a specific Next Reminder Due Date to control when the first reminder is sent, or leave blank to send the first reminder in the next daily reminder run. Selecting the ‘Use Criteria’ option ensures that Editors do not receive an E-mail until they have one or more assignments meeting the criteria; leaving this un-selected for a Role means that these Editors will always receive a summary at the defined interval, even if they have no assignments. Only one letter is sent to each Editor included in the Summary Reminder run, even if they have multiple open invitations or assignments.

**Role Settings**

Send	Editor Role	Frequency (Days)	Next Reminder Due	Summary Letter	Use Criteria
<input type="checkbox"/>	Associate Editor	<input type="text"/>	<input type="text"/>	Please Choose an Automated Reminder Letter <span style="font-size: small;">▼</span>	<input type="checkbox"/>
<input type="checkbox"/>	Editor-in-Chief	<input type="text"/>	<input type="text"/>	Please Choose an Automated Reminder Letter <span style="font-size: small;">▼</span>	<input type="checkbox"/>
<input type="checkbox"/>	Staff Editor	<input type="text"/>	<input type="text"/>	Please Choose an Automated Reminder Letter <span style="font-size: small;">▼</span>	<input type="checkbox"/>

**Criteria**

**Editor Invitations Awaiting Response:** Include Editors who received an Invitation  or more days ago, but have not yet accepted or declined the invitation.

**New Editor Assignments:** Include Editors who were assigned or accepted an Invitation  or more days ago, but have not yet invited reviewers or assigned the submission on to another Editor.

**Required Reviews Complete:** Include Editors who are the Handling Editor, with submissions that reached Required Reviews Complete status  or more days ago and on which they have not yet submitted their recommendation/decision. A value of zero is permitted.

NOTE: If a new Editor role is added after upgrade to version 8.2, that Role will be listed in the ‘Role Settings’ table, but will not be configured with the ‘Send’ box selected. To begin sending reminders to this new role, the administrator will need to come to this page and select the role.

It is recommended that Publications configure a new letter to be used for Automated Editor Reminders. To configure letters, go to PolicyManager, ‘Edit Letters’ and configure a new letter. There are a series of new merge fields that can be used in these letters; see the ‘New Merge Fields’ section of these release notes for more information.



## **Secondary First and Last Name Now Available in Search**

The 'Secondary First Name' and 'Secondary Last Name' fields were added to the EM/PM version 8.0. New in version 8.2, users may search on these fields in both the 'Search People' and the 'Search for Reviewers' areas.

New in version 8.2, when the Editor selects the 'First Name' criterion from the drop-down list, this search now searches both the 'First Name' field and 'Secondary First Name' field. When the Editor selects the 'Last name' field criterion, from the drop-down list, this search now searches both the 'Last Name' field and 'Secondary Last Name' field.

This is available in both the 'Search People' interface and the 'Search for Reviewers' areas of EM. Note there is no visible change to the 'Search People' or 'Search for Reviewers' pages, it is simply an extension of the query.

### **TO CONFIGURE:**

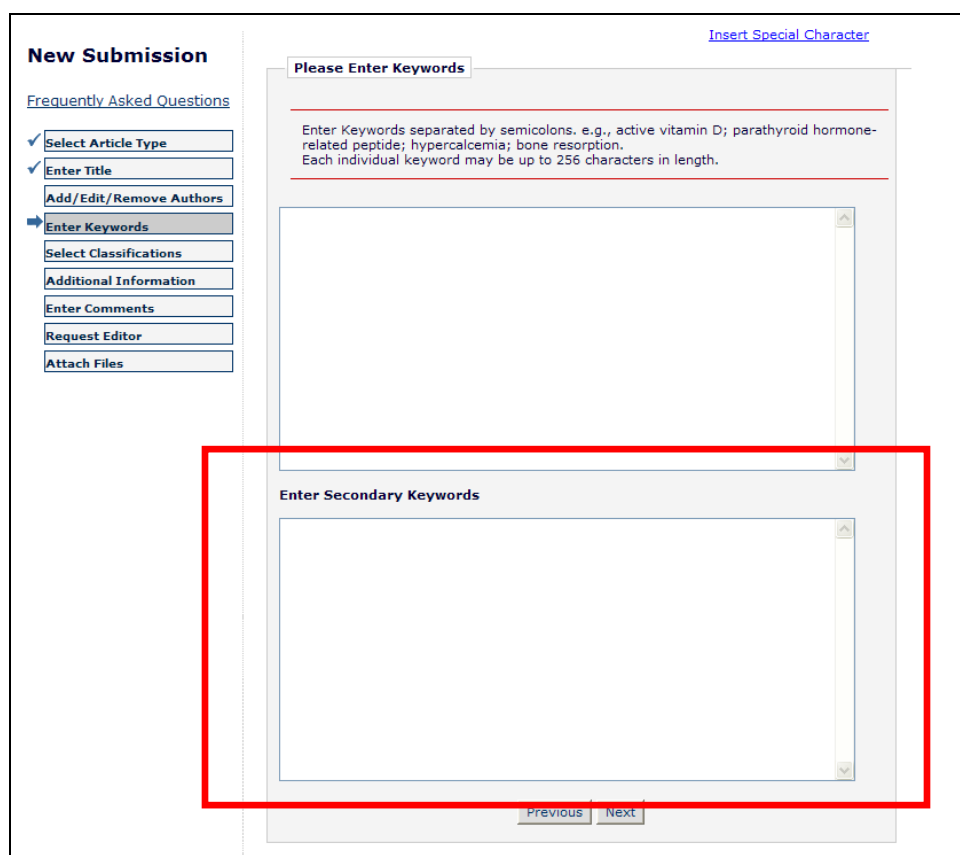
No configuration required. Upon upgrade, any searches on First and Last Name will search both the primary and secondary version of the field. If the Publication is not configured to use Secondary First and Last Names, there will be no impact to the search functionality.

## Secondary Keywords - Submit Manuscript Interface Changes

Some Publications wish to capture submission keywords in multiple languages, for example where the Publication requires English keywords for online systems but publishes in another language, or where it publishes translated papers in English but includes the keywords in their original language.

New in EM/PM version 8.2, a 'Secondary Keywords' field is available for use when submitting a new or revised manuscript. This field, similar to the existing 'Secondary Title', 'Secondary Short Title', and 'Secondary Abstract' fields, can be used to hold the information in a different language than the one entered into the existing system field.

This new field is configurable by Article Type. When configured to display on an Article Type, the 'Secondary Keywords' entry box appears under the 'Keywords' entry box for 'New Submission', 'Revise Submission', or 'Edit Submission'.



The screenshot displays the 'New Submission' interface. On the left, a sidebar contains a 'Frequently Asked Questions' link and a list of buttons: 'Select Article Type', 'Enter Title', 'Add/Edit/Remove Authors', 'Enter Keywords' (highlighted with a blue arrow), 'Select Classifications', 'Additional Information', 'Enter Comments', 'Request Editor', and 'Attach Files'. The main content area features a 'Please Enter Keywords' section with a text input field and a 'Please Enter Secondary Keywords' section with a text input field. The 'Please Enter Secondary Keywords' field is highlighted with a red rectangular box. Above the main input fields is a link for 'Insert Special Character'. Below the 'Please Enter Secondary Keywords' field are 'Previous' and 'Next' navigation buttons. The text in the 'Please Enter Keywords' section reads: 'Enter Keywords separated by semicolons. e.g., active vitamin D; parathyroid hormone-related peptide; hypercalcemia; bone resorption. Each individual keyword may be up to 256 characters in length.'

NOTE: There are no word or character limits applied to this field.

The 'Secondary Keywords' field is hidden on upgrade, but can be configured as 'Optional' or 'Required' for any Article Type. When selected as 'Required', the Author will not be able to complete the submission without filling in this information, and will be notified of the missing information on the *Attach Files – File Summary* page prior to building the submission.

**TO CONFIGURE:**

To enable the new ‘Secondary Keywords’ field for submissions, go to PolicyManager, *Edit Article Type* page, and click ‘Edit’ next to the desired Article Type (or create a new Article Type). This new secondary field is configured as ‘Hidden’ on upgrade to version 8.2, and may be set to either ‘Optional’ or ‘Required’ for any Article Type.

*Partial Page Display; Edit Article Types:*


The screenshot displays the 'Edit Article Types' configuration page in Editorial Manager. The page header includes the Editorial Manager logo and navigation links: ROLEMANAGER, ACTIONMANAGER, POLICYMANAGER, ADMINMANAGER, and ADMINISTRATION HELP. The user's role is 'Managing Editor' and the username is 'mary'. The main content area lists various preferences for an article type, each with a dropdown menu for configuration. The preferences listed are:

- Preferences: Hidden
- Set "Short Title" Preferences: Hidden
- Set Secondary "Short Title" Preferences: Hidden
- Set "Select Section/Category" Preferences: Hidden
- Set "Submit Abstract" Preferences: Hidden
- Set Secondary "Submit Abstract" Preferences: Hidden
- Set "Enter Keywords" Preferences: Optional
- Set "Enter Secondary Keywords" Preferences: Hidden** (highlighted with a red box)
- Set "Select Classifications" Preferences: Optional
- Set "Additional Information" Author Questionnaire Preferences: The New Questionnaire
- Set "Enter Comments" Preferences: Optional
- Set "Suggest Reviewers" Preferences: Hidden
- Set "Oppose Reviewers" Preferences: Hidden

## Secondary Keywords Available on Custom Details

EM/PM version 8.2 introduces a new ‘Secondary Keywords’ field, allowing users to add information to the system, for example in a non-Romanized character set. Some Editors may wish to view this information in the customized *Details* page for submissions. To accommodate this, the ‘Secondary Keywords’ field may be added to customized *Details* layouts to display in any position.

*Partial Details sample:*


<a href="#">Cancel</a> <a href="#">Save and Close</a>	
<a href="#">Manuscript Notes</a> <a href="#">Production Notes</a> <a href="#">Additional Information</a>	
<b>Additional Manuscript Details:</b>	<a href="#">Add/Edit Additional Manuscript Details</a>
<b>Corresponding Author:</b>	<a href="#">Mary Francois Smith</a> ,  North Andover, MA UNITED STATES <a href="#">[Proxy]</a>
<b>Corresponding Author E-Mail:</b>	<a href="mailto:bhopkins@ariessys.com">bhopkins@ariessys.com</a>
<b>Author Comments:</b>	
<b>Short Title:</b>	
<b>Article Type:</b>	News Item
<b>Section/Category:</b>	
<b>Keywords:</b>	Keywords
<b>Secondary Keywords:</b>	Secondary;keywords
<b>Classifications:</b>	This manuscript does not have any Classifications.
<b>Requested Editor:</b>	
<b>Technical Check:</b>	<a href="#">Technical Check Information</a>
<b>Initial Date Submitted:</b>	Feb 03 2011 12:28PM

TO CONFIGURE:

To display the new ‘Secondary Keywords’ field on custom *Details* layouts, go to PolicyManager, [Define Details Page Layouts](#), and click [Edit](#) next to the Details layout to be modified. From there, click the [Select Items to Display](#) link to see the complete list of options available for use on *Details*. This new field is listed in the ‘Information Submitted by Author’ section.

*Partial page display:*

**Information Submitted by Author**

- Article Type
- Full Title
- Secondary Full Title
- Short Title
- Secondary Short Title
- First Author
- Corresponding Author (*First, Middle and Last Name, Institute, City, State, and Country*)
- Corresponding Author E-Mail
- Other Authors (*List excluding Corresponding Author*)
- All Authors (*List including Corresponding Author*)
- All Authors Secondary Information (*List including Corresponding Author*)
- Abstract
- Secondary Abstract
- Section/Category
- Keywords
-   Secondary Keywords
- Classifications
- Author Comments
- Additional Information

Once selected on this page, the Display Order of the items may be updated on the *Layout* page.

## Secondary Fields Available on the Transmittal Form

EM/PM version 8.2 introduces a new ‘Secondary Keywords’ field, allowing users to add submission keyword information to the system, for example in a non-Romanized character set. This field may also be selected for inclusion on the Transmittal Form.

Publications may select the new ‘Secondary Keywords’ field to display on the Transmittal Form in PolicyManager. When selected to display on the Transmittal Form, this field will also be included in the %TRANSMITTAL\_FORM% merge field.

TO CONFIGURE:

To select the submission Secondary Keywords field, go to the *Select Manuscript Metadata Fields* page in PolicyManager. Select/Check the field to display it on the Transmittal form for all submissions.

### Partial Page Display

Select Field	Field Name	
<input checked="" type="checkbox"/>	Publication Volume Number	<a href="#">Help</a>
<input checked="" type="checkbox"/>	Publication Issue Number	<a href="#">Help</a>
<input type="checkbox"/>	Production Notes	<a href="#">Help</a>
<input type="checkbox"/>	Comments to the Editor	<a href="#">Help</a>
<input checked="" type="checkbox"/>	Keyword	<a href="#">Help</a>
<input type="checkbox"/>	Secondary Keywords	<a href="#">Help</a>
<input type="checkbox"/>	Classification Description	<a href="#">Help</a>
<input type="checkbox"/>	Classification Number	<a href="#">Help</a>
<input checked="" type="checkbox"/>	Manuscript Geographic Region Of Origin	<a href="#">Help</a>
<input type="checkbox"/>	Abstract	<a href="#">Help</a>
<input type="checkbox"/>	Secondary Abstract	<a href="#">Help</a>

Once the new field has been selected for inclusion on the Transmittal Form, the display order of the fields may be updated on the *Edit Transmittal Form Layout* page in PolicyManager.

## NEW MERGE FIELDS

### Editor Summary Assignment Merge Fields

Seven (7) new merge fields are introduced in EM/PM version 8.2 for use in Editor letters. Though introduced primarily for use in Automated Editor Summary Reminders, these merge fields are available for use in any letters sent to Editors, displaying the current state of key folders, and allowing the recipient to log in via a deep link from any letter.

There are six new merge fields that can be used for reminding Editors of current workloads in certain folders:

- **%EDITOR\_NEW\_INVITATIONS\_TOTAL%** - inserts the total number of submissions in the recipient's 'New Invitations' folder on the Editor's Main Menu. If the recipient has no invitations, this displays '0' in the e-mail.
- **%EDITOR\_NEW\_INVITATIONS\_DAYS%** - inserts a value equal to the largest number of days elapsed between the current date, and the date the Editor was invited, from all Editor assignments included in the recipient's 'New Invitations' folder. If the recipient has no invitations, this displays '0' in the e-mail.
- **%EDITOR\_NEW\_ASSIGNMENTS\_TOTAL%** - inserts the total number of submissions in the recipient's 'New Assignments' folder on the Editor's Main Menu. If the recipient has no New Assignments, this displays '0' in the e-mail.
- **%EDITOR\_NEW\_ASSIGNMENTS\_DAYS%** - inserts a value equal to the largest number of days elapsed between the current date, and the date the Editor assignment started (was assigned, or the invitation was accepted), from all Editor assignments included in the recipient's 'New Assignments' folder. If the recipient has no new assignments, this displays '0' in the e-mail.
- **%EDITOR\_REQUIRED\_REVIEWS\_COMPLETE\_TOTAL%** - inserts the total number of submissions in the Editor's 'Submissions with Required Reviews Complete' folder on the Editor's Main Menu. If the recipient has no submissions in this folder, this displays '0' in the e-mail.
- **%EDITOR\_REQUIRED\_REVIEWS\_COMPLETE\_DAYS%** - inserts a value equal to the largest number of days elapsed between the current date, and the date the submission entered the recipient's 'Submissions with Required Reviews Complete' folder. If the recipient has no submissions in this folder, this displays '0' in the e-mail.

The following deep link merge field is also available:

- **%EDITOR\_MAIN\_MENU\_DEEP\_LINK%** - inserts a deep link for the recipient Editor to access their Editor Main Menu. Clicking the link will fully log the user into Editorial Manager.

#### TO CONFIGURE:

To include any of these merge fields in existing letters, or to create a new letter, go to PolicyManager, [Edit Letters](#), and select a letter to edit or add a new letter.

An expiration can be configured for the new %EDITOR\_MAIN\_MENU\_DEEP\_LINK% deep link. This expiration is added to the existing *Set Editor Deep Link Expiration* page. Use these settings to set the deep link to expire after:

- X number of clicks
- X number of days
- No expiration [leave both options deselected]

On upgrade, the new merge field is configured to expire after 1 click.

### Set Editor Deep Link Expiration

As a security measure, the journal should specify how long each Editor Deep Link listed below remains active. To keep a link active indefinitely, do not check either box. If both boxes are checked, the link expires when the first criteria is met.

**%EDITOR\_DEEP\_LINK%**  
This deep link is related to a specific submission. It carries out a full login and takes the Editor to a Search Results Page displaying the associated submission.

Expire link after  clicks

Expire link after  days

**%EDITOR\_MAIN\_MENU\_DEEP\_LINK%**  
This deep link logs the recipient in as an Editor, under the Editorial Main menu.

Expire link after  clicks

Expire link after  days



## Reviewer Deep Link

A new deep link merge field is introduced in EM/PM version 8.2 for Reviewers, allowing them to complete the review by clicking a deep link in a letter. When a Reviewer receives an e-mail containing the new deep link, he or she may simply click the link to be logged in and taken directly to the *Reviewer Recommendation and Comments* page for the submission with which the letter is associated, as if they had clicked on the Submit Recommendation link for the submission.

- **%REVIEWER\_RECOMMENDATION\_DEEP\_LINK%** - inserts a deep link for the recipient Reviewer to access the *Submit Recommendation and Comments* page of the related submission. Clicking the link will fully log the Reviewer into Editorial Manager, delivering them directly to the *Submit Recommendation and Comments* page. This link must be used in letters associated with a submission/reviewer combination, such as Review Reminder.

### TO CONFIGURE:

To include this merge fields in existing letters, or to create a new letter, go to PolicyManager, Edit Letters, and select a letter to edit or add a new letter.

An expiration can be configured for the new %REVIEWER\_RECOMMENDATION\_DEEP\_LINK% deep link. To configure, go to PolicyManager, Reviewer and Editor Form Policies section, and click the new Set Reviewer Recommendation Deep Link Expiration link. Use this page to set the deep link to expire after:

- X number of clicks
- X number of days
- No expiration [leave both options deselected]

On upgrade, the new merge field is configured to expire after 1 click.

**Set Reviewer Recommendation Deep Link Expiration**

To set the expiration policy for the %REVIEWER\_RECOMMENDATION\_DEEP\_LINK%, select an option below and enter the desired number of clicks or days. If both options are selected, the link will expire as soon as the first criteria is met. To keep the link active indefinitely, do not select either option.

Expire link after  clicks  
 Expire link after  days

## New Secondary Merge Fields

Some Publications capture submission information in multiple languages using a set of ‘Secondary’ fields in EM/PM. New in EM/PM version 8.2, Publications may use a set of new merge fields to include the Secondary fields in letters.

The following “Secondary” merge fields are now available. These merge fields are available for the same letters where the ‘primary’ merge field is available (i.e.

%SECONDARY\_LAST\_NAME% is populated in letters where the existing ‘primary’ merge field %LAST\_NAME% is available to be populated; %SECONDARY\_KEYWORDS% are populated in letters where the ‘primary’ merge field %KEYWORDS% can be populated). The merge field value is pulled from the registration record, except when these fields are used in the Other Author Notification letter, where the information entered by the Corresponding Author is pulled into the letter.

1. %SECONDARY\_FIRST\_NAME%
2. %SECONDARY\_LAST\_NAME%
3. %SECONDARY\_REALNAME% a concatenation of Secondary First Name and Secondary Last Name. (Note: the %REALNAME% merge field uses Title and Middle Name as well, but there are no Secondary field equivalents for Title and Middle Name).
4. %SECONDARY\_DEGREE%
5. %SECONDARY\_POSITION%
6. %SECONDARY\_DEPARTMENT%
7. %SECONDARY\_INSTITUTION%
8. %SECONDARY\_ADDRESS1%
9. %SECONDARY\_ADDRESS2%
10. %SECONDARY\_ADDRESS3%
11. %SECONDARY\_ADDRESS4%
12. %SECONDARY\_ADDRESS%
13. %SECONDARY\_CITY%
14. %SECONDARY\_STATE%
15. %SECONDARY\_ARTICLE\_TITLE%
16. %SECONDARY\_ARTICLE\_SHORT\_TITLE%
17. %SECONDARY\_ABSTRACT%
18. %SECONDARY\_FIRST\_AUTHOR%
19. %SECONDARY\_AUTHOR\_LIST%
20. %SECONDARY\_AUTHOR\_INST%
21. %SECONDARY\_ALL\_AUTHORS%
22. %SECONDARY\_KEYWORDS%

These new merge fields are available for use in bibliographic searches as well.

### TO CONFIGURE:

To use these new merge fields in letters, go to PolicyManager, [Edit Letters](#), and click [Edit](#) next to any letter where these fields should be added.

To include any of these fields into Bibliographic Searches for your Publication, contact your Aries representative.

# SUGGEST EDITOR FEATURE ENHANCEMENTS

## Close Queue and Assign Editor Now

In EM/PM version 8.1, publications may use the ‘Suggest Editor’ feature for inviting Editors to handle a submission. In this feature, a set of Editors are invited to handle a paper, and when one of those Editors accepts the assignment, the remaining Editor invitation queue is closed out. Sometimes an Editor may not accept the assignment in a timely manner, or an Editor may contact the publication staff outside of EM to let them know they are willing to take the assignment. In these cases, publication staff would prefer to close out the queue manually, and/or assign an Editor directly to the paper without waiting for someone to accept the invitation in the system.

New in version 8.2, Publications using the ‘Suggest Editor’ feature are given more options for inviting Editors and closing the Editor invitation queue.

A new ‘Assign Editor Now’ button is added to the *Editor Selection Summary* page (for Editors with proper permission) after an Editor has searched for and selected a specific Editor for assignment. This button:

1. Un-invites all previously invited Editors and sends un-invitation letters (if configured in Action Manager).
2. Removes any remaining Editors from the queue (no notifications are sent).
3. Assigns the paper to the selected Editor. Note the paper appears in the selected Editor’s *New Assignments* folder (i.e. he is assigned without invitation).

Search for Editors to Invite for Manuscript Number: **BETSYTEST82-D-11-00001**  
**Kermit the Frog**  
**"I'd like this to work"**

[Manuscript Details](#)

Listed below are the Editors that match your search criteria. Select the one(s) you want and click the 'Add to Queue' button. Your selections will be added to the top of the queue.

Search Editor Last Name:

Manuscript Classifications: \_\_\_\_\_ Manuscript Keywords: \_\_\_\_\_

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

Select	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations
<input checked="" type="checkbox"/>	Editor-in-Chief	<a href="#">Edward Editor, MD</a>	Duke Medical School	0	0	41	0
<input type="checkbox"/>	Associate Editor <small>(This editor declined the invitation of the current version)</small>	<a href="#">Emily Editor, MD</a>	University of Colorado	0	0	12	0
<input type="checkbox"/>	Editor-in-Chief	<a href="#">Lyndon Holmes</a>			0	1	0

When a specific Editor is selected and the ‘Assign Editor Now’ button is clicked, the user is brought to the *Assign Editor - Confirm Selection and Customize Letters* page. The letter configured for the ‘Editor Assigned (Not Invited)’ event in ActionManager is displayed as the

default selection, though the user may select any letter from the ‘Invite/Assign/Unassign Editor’ letter family.

NOTE: The only letter available for customization is the letter to the Assigned Editor. If there are any Editors that have previously been assigned, they will all receive the default letter configured for the ‘Un-invite Editor’ event in ActionManager.

**Assign Editor - Confirm Selection and Customize Letters**

The following people are configured to receive a letter when an Editor is assigned to a submission.

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

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

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

Editor Being Assigned			
Name	Letter		Do Not Send Letter
Edward Editor, MD (Editor-in-Chief)	Editor Assignment <span style="float: right;">▼</span>	<a href="#">Customize</a>	<input type="checkbox"/>

Additionally, a new ‘Close Queue’ button gives authorized Editors the ability to close out an Editor queue at any time without necessarily assigning another Editor at that time. Execution of this function performs the first 2 steps described above for ‘Assign Editor Now’ button:

1. Un-invites all invited Editors and sends un-invitation letters (if configured in Action Manager).
2. Removes any remaining Editors from the queue (no notifications are sent).

**Editor Selection Summary - Manuscript Number BETSYTEST82-D-11-00001**  
**Kermit the Frog**  
**"I'd like this to work"**

[Manuscript Details](#) ▶

Below is a list of suggested candidates based on classification matches with the manuscript. [\(more...\)](#)

Manuscript Classifications	Manuscript Keywords

**Invited Editors**

Name	Invitation Status	Date Invited	Date Closed
<a href="#">Anthony Author, MD</a>	Invited	May 31 2011 02:46PM	

Search Editor Last Name

[Select All / Clear All](#)           

Candidates							
Select	Invitation Order	Editor Role	Editor Name	Institution	Classification Matches	Current Assignments	Open Invitations
<input checked="" type="checkbox"/>	1 <input style="width: 30px;" type="text"/>	Staff Editor	<a href="#">Jungle Book, oh</a>		0	0	0
<input checked="" type="checkbox"/>	2 <input style="width: 30px;" type="text"/>	Editor-in-Chief	<a href="#">Edward Editor, MD</a>	Duke Medical School	0	41	0
<input checked="" type="checkbox"/>	3 <input style="width: 30px;" type="text"/>	Editor-in-Chief	<a href="#">Lyndon Holmes</a>		0	1	0
<input checked="" type="checkbox"/>	4 <input style="width: 30px;" type="text"/>	Editor-in-Chief	<a href="#">Smartbot Smartbot</a>		0	0	0
	<input style="width: 30px;" type="text"/>	Associate Editor <small>(This editor declined the invitation of the current version)</small>	<a href="#">Annie The Dog, PhD</a>		0	10	0

When the ‘Close Queue’ button is clicked, any invited Editors are un-invited, and they will receive the default letter configured for the ‘Un-invite Editor’ event in ActionManager. The submission returns to whatever folder(s) it was in prior to the first Editor being invited (e.g. *New Submissions Requiring Assignment / Revised Submissions Requiring Assignment / New Assignments*).

**TO CONFIGURE:**

To enable the ‘Suggest Editor’ feature for your publication, contact your Aries account representative.

The new features described here are governed by a new RoleManager sub-permission called ‘Close Queue and Assign Editor Directly’, added beneath the existing ‘Assign Editor Using Suggest Editor Queue’ permission. Editors with the new sub-permission enabled will have the new buttons available.

Publications that are not using the Suggest Editor feature will not see this new permission in Editor RoleManager.

# PRODUCTION TRACKING ENHANCEMENTS

## Push Submission into Schedule Group

In PM version 8.1, if a submission is not assigned to a Schedule Group when production is first initiated on that submission, then assigning the submission to a Schedule Group at a later time is a multi-step process. Users must first go to the ‘Manage Schedule Groups’ folder on the Production Tasks Menu, edit the Schedule Group details, then use the ‘Add Submissions’ feature to ‘pull’ one or more submissions into the Schedule Group.

New in PM version 8.2, users with ‘Manage Schedule Group’ permission will see a new Action Link in certain folders. This link, called either Assign to Schedule Group or Change Schedule Group (where the submission is already in a Schedule Group), allows the user to either assign individual submissions that are currently in Production to a Schedule Group, using the Assign to Schedule Group link, or to change the current schedule group assignment for a submission, using the Change Schedule Group link.

The following folders display the new Assign to Schedule Group or Change Schedule Group link for users with ‘Manage Schedule Group’ permission. The link is only included for submissions that are currently in Production.

1. Submission Tasks Assigned to Me
2. ‘At-Risk’ Submissions
3. Production Initiated – No Tasks Assigned
4. Submission Tasks I Have Assigned
5. View All Submissions In Production
6. View All Production Tasks With Authors
7. Production Status Grid

*Sample folder displaying both links:*

Production Initiated – No Tasks Assigned											
Contents: This page lists all submissions in production with no production tasks assigned, or submissions for which all production task assignments have been cancelled.											
Page: 1 of 1 (10 total submissions)						Display 10 results per page.					
Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
<a href="#">View Submission</a> <a href="#">Assign Production Task</a> <a href="#">Change Schedule Group</a> <a href="#">End Production</a> <a href="#">Production Status Grid</a> <a href="#">Production Details</a> <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">AuthorMapper WFIAE</a> <a href="#">Author Mapper LASTNAME</a> <a href="#">Send E-mail</a>	BETSYTEST61-D-08-00011	40.785	Testy Goon	My attempt at Offering a Requested Proposal, or, Whatever It Is Called.	Fail Issue			Commentary	Jun 13 2008 4:05PM	Jun 13 2008 4:13PM	
<a href="#">View Submission</a> <a href="#">Assign Production Task</a> <a href="#">Assign to Schedule Group</a> <a href="#">End Production</a> <a href="#">Production Status Grid</a> <a href="#">Production Details</a> <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">AuthorMapper WFIAE</a> <a href="#">Author Mapper LASTNAME</a> <a href="#">Send E-mail</a>		Unassigned	Mary Francois Smith, PhD (UNITED STATES)	DOG TRAINING MADE EASY				Original Study	Jul 3 2008 10:17AM	Nov 11 2008 3:55PM	Dec 5 2011 12:00AM

The link is also displayed in Search Submission results for submissions where Production has been initiated.

*Sample Search Submissions Results page:*

**Search Submissions - Search Results**

Production Status Term is equal to 'Ready for Copyedit'

[Switch to Editorial View](#)

Page: 1 of 1 (7 total submissions) Display  results per page.

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Production Status	Schedule Group	Initial Date Submitted	Date Production Initiated	Submission Target Online Date	Sect
<a href="#">View Submission</a> <a href="#">Details</a> <a href="#">History</a> <a href="#">Technical Check</a> <a href="#">Solicit Commentary</a> <a href="#">Classifications</a> <a href="#">View Reviews and Comments</a> <a href="#">Assign Production Task</a> <a href="#">Change Schedule Group</a> <a href="#">End Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">AuthorMapper WFIAE</a> <a href="#">Author Mapper LASTNAME</a> <a href="#">Send E-mail</a>	DEMO2		Andrew Author (UNITED STATES)	Needling versus medical treatment in encapsulated blebs. A randomized, prospective study	Original Study		encapsulated blebs, glaucoma;	5: CONJUNCTIVA Ha 30: GLAUCOMA 30.310: drainage devices 2000: medical treatment	Ready for Copyedit [Not Copyedited]	Spring Issue	May 22 2001 1:59PM	Nov 6 2009 12:13PM	May 3 2010 12:00AM	
<a href="#">View Submission</a> <a href="#">View Reference Checking Results</a> <a href="#">Details</a> <a href="#">History</a> <a href="#">Technical Information</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Classifications</a> <a href="#">View Reviews and Comments</a> <a href="#">Assign Production Task</a> <a href="#">Assign to Schedule Group</a> <a href="#">End Production</a> <a href="#">Set Final Disposition</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">AuthorMapper WFIAE</a> <a href="#">Author Mapper LASTNAME</a> <a href="#">Send E-mail</a>	BETSYTEST72-D-09-00005		Anthony Author (UNITED STATES)	Migratory patterns of Tree Frogs	Original Study				Ready for Copyedit; [Not Copyedited]		Jul 14 2009 10:48AM	Jul 14 2009 11:51AM		
<a href="#">View Submission</a>	DEMO456		Anthony Author	Mystery	Original					Spring	Apr 15 2003 12:23PM	May 30 2005		

When the link is clicked, the user is brought to a new *Assign to Schedule Group* page. The instructional text at the top of the page is dependent on whether the submission is already in a Schedule Group, or if it is being added for the first time.

If the submission is not yet in a Schedule Group, the Current Schedule Group Assignment displays as 'None'. If the submission is in a Schedule Group, the Schedule Group Name displays, as well as the Target Online Publication Date and Target Publication Date associated with that Schedule Group. When a new Group is selected from the drop-down, these dates refresh to reflect the newly selected Schedule Group.



*Sample - Submission not yet in Schedule Group:*

**Assign Submission to a Schedule Group For Manuscript Number: Unassigned, DOI: Unassigned  
Mary François Smith (UNITED STATES): "DOG TRAINING MADE EASY"**

From the 'Assign Submission to Schedule Group' drop-down menu below, select the name of the Schedule Group to which the submission will be assigned. Then click the 'Proceed' button.

You may also enter a Submission Target Online Publication Date specific to this submission. This will be used to schedule due dates for tasks which are configured to recognize this date.

Current Schedule Group Assignment:	None
Assign Submission to Schedule Group:	Please select a Schedule Group ▼
Schedule Group Target Online Publication Date:	
Schedule Group Target Publication Date:	
Submission Target Online Publication Date:	12/05/2011 (mm/dd/yyyy)

Cancel Proceed

*Sample - Submission already in Schedule Group:*

**Assign Submission to a Schedule Group For Manuscript Number: DEMO2, DOI: Unassigned  
Andrew Author (UNITED STATES): "Needling versus medical treatment in encapsulated blebs. A randomized, prospective study"**

The current Schedule Group assignment is shown below.

From the 'Assign Submission to Schedule Group' drop-down menu below, select the name of the Schedule Group to which the submission will be assigned. Then click the 'Proceed' button.

You may also enter a Submission Target Online Publication Date specific to this submission. This will be used to schedule due dates for tasks which are configured to recognize this date.

Current Schedule Group Assignment:	Spring Issue
Assign Submission to Schedule Group:	Please select a Schedule Group ▼
Schedule Group Target Online Publication Date:	
Schedule Group Target Publication Date:	
Submission Target Online Publication Date:	05/03/2010 (mm/dd/yyyy)

Cancel Proceed

Clicking the 'Proceed' button completes the assignment of the new Schedule Group, and brings the user to a page to define the Table of Contents information about the submission within the Schedule Group, including Target Table of Contents Position, Target Number of Pages, Target Start Page, Target End Page, Black and White Image Count, and Color Image Count.

**Assign Submission to a Schedule Group**  
for Manuscript Number: SALLYTEST72-D-09-00002, DOI: Unassigned  
Susan Author (UNITED STATES) : "Another Letter to the Editor About that Controversial Paper"

Enter any desired metadata for the submission into the boxes below, then click "Proceed"

Target Table of Contents Position:	4
Target Number of Pages:	10
Target Start Page:	45
Target End Page:	64
Black and White Image Count:	4
Color Image Count:	2

Table of Contents for Schedule Group "Second Schedule Group"

Target TOC Position	ManuscriptNumber	Article Title	Article Type	Target Number of Pages	Target Start Page	Target End Page	Black and White Image Count	Color Image Count
1	SALLYTEST61-D-08-00031	Test Title 7.24.08	Original Study	5	0	0	2	1
2	SALLYTEST73-D-10-00001	Test Submissions 5.10.10	Original Study	0	0	0	0	0
3		This is an Angry Response to a Very Controversial Paper	Letter to the Editor	0	0	0	0	0

**TO CONFIGURE:**

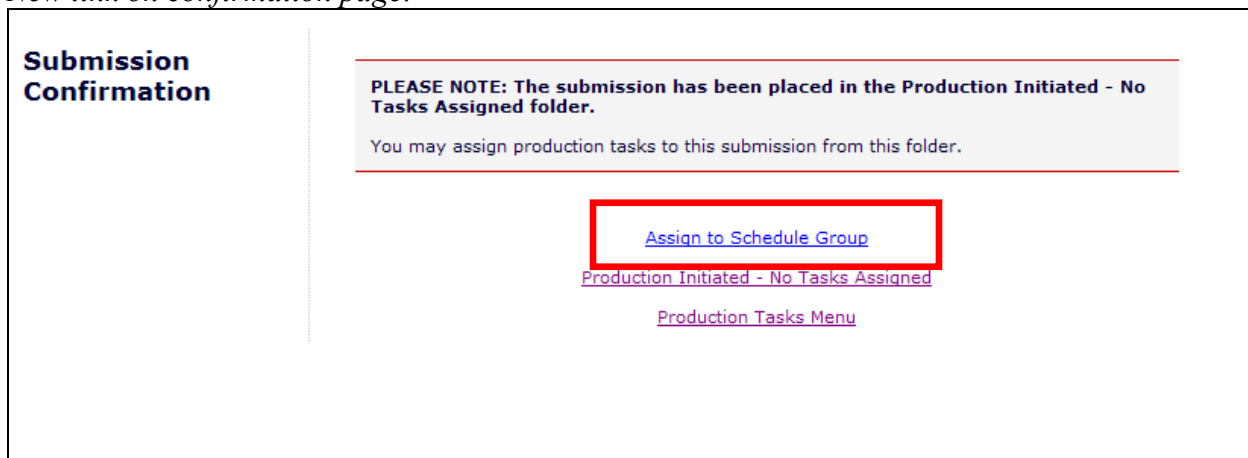
There is no configuration required to use this new feature. Users with ‘Manage Schedule Groups’ permission will see the new links available in the listed folders for submissions where Production has been Initiated.

## Create Submission Confirmation Page Enhancement

In PM version 8.1, Editor roles with ‘Create Submission’ permission enabled can create a new submission via the ‘Search People’ function on the Production Tasks Main Menu. After creating a submission via this feature, the submission is placed into the “Production Initiated – No Tasks Assigned” folder. Users must go to that folder to assign a Production Task, but they must also go to the Manage Schedule Groups page to “pull” the submission into an existing Schedule Group.

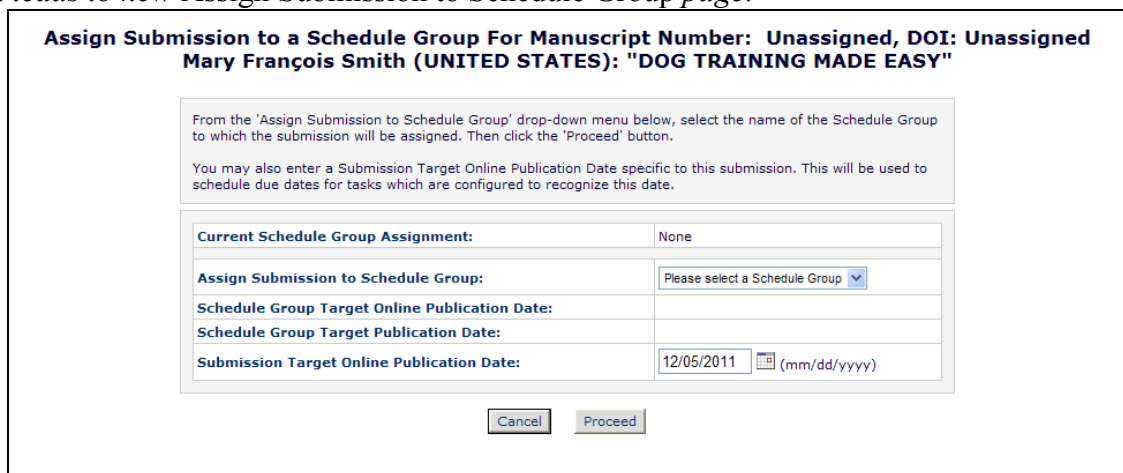
New in version 8.2, users now see an [Assign to Schedule Group](#) link, allowing them to go directly to the new *Assign Submission to a Schedule Group* page (described in the ‘Push Submission into Schedule Group’ section of these release notes).

*New link on confirmation page:*



The screenshot shows a page titled "Submission Confirmation". On the left, there is a vertical sidebar with the title "Submission Confirmation". The main content area contains a red-bordered box with the following text: "PLEASE NOTE: The submission has been placed in the Production Initiated - No Tasks Assigned folder. You may assign production tasks to this submission from this folder." Below this box, there is a blue link "Assign to Schedule Group" which is highlighted with a red rectangular box. Underneath the link, there are two purple links: "Production Initiated - No Tasks Assigned" and "Production Tasks Menu".

*Link leads to new Assign Submission to Schedule Group page:*



The screenshot shows the "Assign Submission to a Schedule Group" page. The title is "Assign Submission to a Schedule Group For Manuscript Number: Unassigned, DOI: Unassigned Mary François Smith (UNITED STATES): "DOG TRAINING MADE EASY"". Below the title, there is a text box with instructions: "From the 'Assign Submission to Schedule Group' drop-down menu below, select the name of the Schedule Group to which the submission will be assigned. Then click the 'Proceed' button. You may also enter a Submission Target Online Publication Date specific to this submission. This will be used to schedule due dates for tasks which are configured to recognize this date." Below the text box, there is a form with the following fields: "Current Schedule Group Assignment:" with a value of "None"; "Assign Submission to Schedule Group:" with a dropdown menu showing "Please select a Schedule Group"; "Schedule Group Target Online Publication Date:"; "Schedule Group Target Publication Date:"; and "Submission Target Online Publication Date:" with a date input field showing "12/05/2011" and a calendar icon, with "(mm/dd/yyyy)" next to it. At the bottom of the form, there are "Cancel" and "Proceed" buttons.

TO CONFIGURE:

There is no configuration required to use this new feature. Users with ‘Create Submission’ permission and ‘Manage Schedule Groups’ permission will see the new link on the *Create Submission Confirmation* page.

## Return to Search Submissions

In PM version 8.1, an Editor with ‘Assign Submission Production Task’ permission may assign production tasks from several folders; once the task has been assigned, the Editor is brought to the *Production Task Assignment Confirmation* page. When the Editor reaches that page by having used the ‘Search Submissions’ feature, the confirmation page only displays a link to “Return to Search Results”. New in version 8.2, a new Return to Search Submissions link is added to the *Production Task Assignment Confirmation* page when the task is assigned from the *Search Results* page.



Clicking this link returns the user to the Search Submissions interface. The search criteria from the referring submission are retained, so that the Editor may modify the previous search for another submission.

TO CONFIGURE:

There is no configuration required to use this new feature.