Invited Papers & Commentary

Melanie Cotterell,
Client Services Manager,
mcotterell@ariessys.com
Agenda

- Overview - Options for Invited Workflows
- Commentaries
- Linked Submissions
- Letters to the Editor (LTE)
- Proposals
- ALF
- Reporting & Reminders
- Configuration
- Questions
Overview - Options for Invited Workflows

Choosing the right invitation type
Overview - Three Options

Commentaries
- Controversial article has been published (or may still be in process). This is the “parent” submission.
- Editor invites Authors to submit commentaries on that article.
- The invited papers received are “child” submissions and are linked with the parent in EM.

Proposals
- Publication creates “Proposal” - this is not peer-reviewed or published.
- One or more experts invited to submit manuscript on a particular topic. An entire issue may be devoted to invited manuscripts (e.g. festschrift).
- The invited papers received are linked to the Proposal (parent) in EM and may be published together.

Linked Submissions & Letters To The Editor
- Regular Submissions or Unsolicited Letters to the Editor are received by the publication.
- These can be grouped together via Linked Submissions (Regular or LTE).
- The original Author can then be invited to respond to the letters and all of the Authors may be given access to all of the submissions in the linked group.
Commentaries

Controversial Submission?
Commentaries

- Commentaries are invited (solicited) submissions, relating to an existing submission (once assigned to an editor).
Solicit Commentary

- Permission controlled.
- Invited Article Types.
- After clicking Solicit Commentary link, you will be asked to provide some basic information about the submission, used for reminders!
- Option to pre-select the article type for the author.
- The original paper becomes the parent submission.
Invite Authors

• Same search options for proposals and commentaries.
• Similar to searching for reviewers.
• Can invite one or more authors, to contribute one or more submissions each.
• ALF – will appear later.
Author Selection

- Permission controls the Invitation/Direct Assignment options.
- Can see current activity for each author, on this EM site.
- Journals with XPub Functionality can see this data across the portal.
Invitation & Additional Notes

- Default Letter displayed, other letters can be selected and customized.
- If using Invitation Notes to Author, can also enter note for each invitation.
- Notes visible on Details page and available as Search Submission Criterion.
Editor - Proposal Menu

- Permission controlled.
- Overview in My Submissions with Pending Commentaries Folder.
• Merge Fields can be used in email to Accept/Decline/Submit.
• Action Links can also be used from the Author Menu.
Author – Submit Invited Manuscript

- Invited Article Types will be available for Author to select if not preset by Editor.
New (Child) Submissions – Editor Main Menu

- Manuscript processes as any regular submission in EM.
- View Related Submissions shows split view Parent/Child(ren).
- Move to Completed Folder when all Commentaries submitted.

- Summary statistics updated.

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Article Type</th>
<th>Article Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Submission</td>
<td>UKACTESTI-D-18-00004</td>
<td>Original Study</td>
<td>Ice tea isn’t a real thing and coffee always smells better than it tastes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Article Type</th>
<th>Article Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Submission</td>
<td></td>
<td>Commentary</td>
<td>Tea cannot be made from a coffee machine, not if you want it to taste like Tea!</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Article Title</th>
<th># of Authors Invited</th>
<th># of Authors Accepting</th>
<th># of Authors Declining</th>
<th># of Author Submissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ice tea isn’t a real thing and coffee always smells better than it tastes.</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
Questions?
Linked Submissions

Independent but together
Linked Submissions

• With permission, can link/group any submissions together.
• They go through the workflow independently, but can be easily associated with each other.

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Article Type</th>
<th>Section Category</th>
<th>Article Title</th>
<th>Author Name</th>
<th>Initial Date Submitted</th>
<th>Status Date</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Submission</td>
<td>Commentary</td>
<td>Tea cannot be made from a coffee machine, not if you want it to taste like Tea!</td>
<td>Mickey Mouse</td>
<td>Jun 07, 2018</td>
<td>Jun 07, 2018</td>
<td>Manuscript Submitted</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Add to/Create Group

- Can choose existing Group.
- Create a new Group.
- (Publish With ID) PWID – a unique identifier for all submissions in this group.
- Set reviews to be shared between papers.
Add To Group

- Add this submission to the group.
- Can use action link for any submission and add to this group.
- Folders on Editor Main Menu.

- Submission will show icon if contained in a regular linked group or LTE Group.

Add to/Create Linked Submission Group

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

To add the submission to an existing Linked Submission Group

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

To create a new Linked Submission Group

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

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

Assign Publish With ID

Click the 'Assign Publish With ID' button to assign a Publish With ID to your referring submission.
Linked Submission Group View

- Can use with invited papers, regular papers or a mixture.
- Same view for regular Linked group or Letters To Editor.
Questions?
Letters to the Editor (LTE)

Collate and invite a response
Letters to the Editor

- Letters to the Editor (LTE) are a special type of Linked Submissions.
- Often a number of unsolicited letters/commentaries on a published article are received.
- The original paper and the letters/commentaries received can be linked and the author of the original paper given access to them all.
- The original author can be invited/assigned to respond through Solicit Commentary Action Link.
Select Papers To Send

• Solicit Commentary process as before with one additional step at the end.
• Submission which you used the action link will be selected by default.
Author Menu

- Author sees restricted version of Linked Submissions Page.
Once Submitted...

- Paper automatically added to LTE Linked Submission Group.
Questions?
Proposals

Special Issues
Create the Proposal

- Proposals are designed to collect solicited papers on a particular topic, or for a special issue.
- With Proposals, you can build a PDF which will be visible to the invited authors. These PDFs can be submission examples, Table of Contents, or Detailed Instructions.
Proposal Details

- Choose Proposal Article Type and add a title.
- Pre select the Article Type for the Author, or let them choose.
- Build a PDF for the Proposal or proceed without one and assign a Handling Editor.
Proposal – Invitation to Authors

- Invite Authors action link appears for users with permission.
- Invitation process is exactly the same as for Commentaries.
Uninviting, promoting alternates, adding more authors...

- Clicking Invite Authors link shows all current invitation activity.
- Proposal Details page also shows this if configured.
- Can uninvite manually or automatically based on Article Type settings.
Proposal Menu

- Editors can track proposals through folders.
- Familiar Action links.
- Set Final Disposition to close proposal once child submissions all received.
Questions?
ALF
What is an ALF?

- A file containing Authors to be invited.
- Avoids proxy registering each Author individually.
- Tab or comma delimited file.
- Contains Author names and email addresses (Required), ORCIDs, Note, Invite flag, Invited Article Title (Optional).
- Editor uploads file using “Upload Author List” option on Author Selection Summary page.
- EM validates file, points out duplicates and/or missing data.
- Displays Authors from the file in the ‘Author Candidates’ Grid.
- Authors can be pre-selected for invitation (reduced clicks!).
- No Configuration needed.
- For EM and EM/PM sites.
Inviting Authors

- Can upload file of Authors to be Proxy Registered and invited.
- The ‘Info’ icon gives instructions on formatting the simple file.
Upload File

• Drag & Drop or Browse.
Preview File Data

- Set Invitation Column to “True” to preselect Author for invitation.
- Errors will be highlighted so you can correct the file.

The Author Candidates found in the uploaded file are displayed below. If any errors exist within the data they are highlighted with a warning icon. Depending on the issue with the data, the offending record may not be imported. Rolling over the ! icon where an issue has been discovered will provide information about the issue. The ‘Ignore’ option can be used to exclude Authors before importing the list.

To load the approved records into the ‘Author Candidates’ grid choose ‘Import’. Choose the ‘Remove’ option to remove your file so that you may correct any issues and upload the file again.

<table>
<thead>
<tr>
<th>Invitation</th>
<th>FIRSTNAME</th>
<th>LASTNAME</th>
<th>EMAIL</th>
<th>ORCID</th>
<th>Title</th>
<th>NOTE</th>
<th>Ignore</th>
</tr>
</thead>
<tbody>
<tr>
<td>True</td>
<td>Caroline</td>
<td>Webber</td>
<td><a href="mailto:cwebber@ariessys.com">cwebber@ariessys.com</a></td>
<td></td>
<td>Chapter 1</td>
<td>Note for Chapter 1</td>
<td></td>
</tr>
<tr>
<td>True</td>
<td>Sally</td>
<td>Unnoske</td>
<td><a href="mailto:subnoske1@ariessys.com">subnoske1@ariessys.com</a></td>
<td>0000-0002-5605-6957</td>
<td>Chapter 2</td>
<td>Note for Chapter 2</td>
<td></td>
</tr>
<tr>
<td>True</td>
<td>Larry</td>
<td>Luchez</td>
<td><a href="mailto:ll@ariessys.com">ll@ariessys.com</a></td>
<td></td>
<td>Chapter 3</td>
<td>Note for Chapter 3</td>
<td></td>
</tr>
<tr>
<td>True</td>
<td>Caroline</td>
<td>Webber</td>
<td><a href="mailto:cwebber@ariessys.com">cwebber@ariessys.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Remove | Import
EM Matching - Existing Users

• Match on email address, ORCID and names.
• No record? EM will proxy register user.
Questions?
Reports & Reminders

Tracking and Chasing Invitations/Child Submissions
Reports & Reminders

• On Proposal Menu.
• Can also be accessed from Reports on Editorial Menu.
• Permission Controlled.
### Proposal Pipeline Report

This report displays all Author invitations and invited submissions associated with a proposal. If you select multiple criteria, the results returned will be limited to those invitations and manuscripts that fulfill all of the selected criteria. Incomplete proposals with unapproved PDFs and proposals with a final disposition of 'Withdrawn Proposal' are automatically excluded from the results.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Handling Editor</td>
<td></td>
</tr>
<tr>
<td>Proposal Status</td>
<td></td>
</tr>
<tr>
<td>Proposal Manuscript Number</td>
<td></td>
</tr>
<tr>
<td>Proposal Title (contains)</td>
<td></td>
</tr>
<tr>
<td>Proposal Target Publication Volume</td>
<td></td>
</tr>
<tr>
<td>Proposal Target Publication Issue</td>
<td></td>
</tr>
<tr>
<td>Proposal Target Publication Date</td>
<td>(mm/dd/yyyy)</td>
</tr>
<tr>
<td>Proposal Approved Date</td>
<td>(mm/dd/yyyy)</td>
</tr>
<tr>
<td>Invitation Notes to Author (contains)</td>
<td></td>
</tr>
<tr>
<td>Author Submission Due Date</td>
<td>(mm/dd/yyyy)</td>
</tr>
<tr>
<td>Invited Article Title (contains)</td>
<td></td>
</tr>
<tr>
<td>Invited Article Editorial Status</td>
<td></td>
</tr>
<tr>
<td>Submission Actual Publication Volume</td>
<td></td>
</tr>
<tr>
<td>Submission Actual Publication Issue</td>
<td></td>
</tr>
<tr>
<td>Submission Actual Publication Date</td>
<td>(mm/dd/yyyy)</td>
</tr>
<tr>
<td>Submission Target Publication Volume</td>
<td></td>
</tr>
<tr>
<td>Submission Target Publication Issue</td>
<td></td>
</tr>
<tr>
<td>Submission Target Publication Date</td>
<td>(mm/dd/yyyy)</td>
</tr>
</tbody>
</table>

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your 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.

<table>
<thead>
<tr>
<th>Proposal Article Type:</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Proposed Book Proposal</td>
</tr>
<tr>
<td></td>
<td>Select All Clear All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Proposal Section/Category:</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No Section Assigned</td>
</tr>
<tr>
<td></td>
<td>Select All Clear All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Submission Article Type:</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Invite Author to Submit</td>
</tr>
<tr>
<td></td>
<td>Select All Clear All</td>
</tr>
</tbody>
</table>
Author Invited - No Response Report

- Various search criteria.
- With permission, can send reminders.
- Can automate reminders.
Automated Reminders

- Choose criterion and set appropriate letter template.
- Save report and settings.
- Reminder reports run automatically every day sending letters as required.

**Saved Automated Reminders**

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them. Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the Drag & Drop tool.

<table>
<thead>
<tr>
<th>Reminder Name</th>
<th>Reminder Type</th>
<th>Number of Days</th>
<th>Reminder Creator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invited 10 days no reply</td>
<td>Outstanding Invitations (Commentary)</td>
<td>10</td>
<td>mary mary</td>
</tr>
</tbody>
</table>
Questions?
Configuration

Permissions, Parameters and Notifications
Role Manager - Permissions

- System Administrator Functions > Role Manager > Editor Role
- Publisher role may need permission to View Linked Groups.
- Reminder permissions can be restricted.
Policy Manager – Article Types

- System Administrator Functions > Policy Manager > Submission Policies > Edit Article Types
- Article Type Family – Proposal or Regular.
- Invited – Can only be seen by authors with an open invitation.

<table>
<thead>
<tr>
<th>Order</th>
<th>Article Type</th>
<th>Article Type Family</th>
<th>Invited</th>
<th>Editor/Publish</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Letter to the Editor</td>
<td>Regular</td>
<td></td>
<td>Remove Edit Copy</td>
</tr>
<tr>
<td>2</td>
<td>Commentary</td>
<td>Regular</td>
<td>✓</td>
<td>Remove Edit Copy</td>
</tr>
<tr>
<td>3</td>
<td>Special Issue</td>
<td>Proposal</td>
<td></td>
<td>Remove Edit Copy</td>
</tr>
<tr>
<td>4</td>
<td>Special Issue Article</td>
<td>Regular</td>
<td>✓</td>
<td>Remove Edit Copy</td>
</tr>
</tbody>
</table>
Policy Manager – Invitation Notes

- System Administrator Functions > Policy Manager > Additional Data Policies > Edit Additional Invitation Details
Policy Manager - Letters

- System Administrator Functions > Policy Manager > Email and Letter Policies > Edit Letters
- Letter Families – Author Invitation/Author Reminder

**Merge Fields:**
- %TITLE_OF_PARENT_SUBMISSION%- Inserts the Title of the Proposal, or the Submission Requiring Commentary.
- %TARGET_PUB_DATE%- Inserts the projected Publication date.
- %INVITED_SUBMISSION_RESPOND_DATE%- Inserts the date by which the Author is expected to respond to the invitation.
- %INVITED_SUBMISSION_DUE_DATE%- Inserts the date by which the Author is expected to submit an invited submission.
- %INVITATION_NOTES_TO_AUTHOR%- Inserts text entered by the Editor in the ‘Invitation Notes to Author’ field at the time of the invitation.
- %INVITED_AUTHOR_NAME%- Inserts the name of the sender when an Author declines to submit. To pull in the name of Invited Author when invitation is sent, use %REALNAME%.
- %ACCEPT_INVITATION%- Inserts a hyperlink in a letter that automatically triggers the ‘Author Agrees to Invitation’ function in the system. The Author will be fully logged into the system and delivered to the ‘Accept Invitation’ page.
- %DECLINE_INVITATION%- Inserts a hyperlink in a letter that automatically triggers the ‘Author Declines Invitation’ function in the system. The Author will be fully logged into the system and delivered to the ‘Decline Author Invitation’ page.
- %SUBMIT_INVITED_MANUSCRIPT%- Inserts hyperlink that automatically triggers the ‘Author Agrees to Invitation’ function (if the Author has not previously accepted), fully logs Author into the system, directly to the Manuscript Submission interface.
- %AUTHOR_REMIND_COUNT%- Inserts number of reminder letters Author has been sent for this submission/revision. For use in Author Reminder letters.
- %AUTHOR_REMIND_DATE%- Inserts date the last revision reminder letter was sent to Author. For use in Author Reminder letters.

**Other Merge fields for related Letters:**
- %LINKED_REVIEWER_COMMENTS_TO_AUTHOR%- Inserts Reviewer Comments to Author from selected completed reviews from Linked Submissions. This will merge into Reviewer Invitation/Assignment Letter. The contents are labelled with the Linked Submissions’ manuscript no. and article title.
- %LINKED_REVIEWER_COMMENTS_TO_EDITOR%- Inserts the Reviewer Comments to Editor from selected completed reviews from Linked Submissions. This will merge into the Reviewer Invitation/Assignment Letter. The contents are labelled with the Linked Submissions’ manuscript no. and article title.
- %LINKED_REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%- Inserts all Custom Review Questions and responses where the question is configured with the ‘Available for Decision Letter Merging’ option set plus the Comments to Author field from the Review records selected for inclusion from the Linked Submission Groups. This will merge into the Reviewer Invitation/Assignment Letter. The contents are labelled with the Linked Submissions’ manuscript number, revision number, and article title.
- %LINKED_COMMENTARY_DEEP_LINK%- Inserts a hyperlink in the decision letter. If an Editor has granted the Corresponding Author access to the PDFs, the hyperlink provides that Author with access to the Author version of the Linked Submissions page without having to manually login to the system. The Author will be prompted to log into EM to navigate to any other pages in the system. Available for use in Editor Decision letters.
Action Manager – Author Letters

- System Administrator Functions > Action Manager > Author Letters
- Choose Default letter for event:

<table>
<thead>
<tr>
<th>Author Invitation</th>
<th>Event</th>
<th>Author Letters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Proposal</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>Invite Authors for Proposal</td>
<td>Author Invitation for Proposal</td>
<td></td>
</tr>
<tr>
<td>Author Assigned (Not Invited) for Proposal</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>Solicit Commentary on Submission</td>
<td>Author Invitation for Commentary</td>
<td></td>
</tr>
<tr>
<td>Author Assigned (Not Invited) for Commentary</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>Invited Submission Due Date Changed</td>
<td>Author Changed Invited Due Date Confirmation</td>
<td></td>
</tr>
<tr>
<td>Uninvite Authors</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>Author Unassigned after Accepting Invitation</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>Author Unassigned after Assignment</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>Promote Alternate Authors</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>Author Agrees to Invitation</td>
<td>Author Instructions and Due Date</td>
<td></td>
</tr>
<tr>
<td>Author Declines Invitation</td>
<td>Author Notice Invitation Declined</td>
<td></td>
</tr>
</tbody>
</table>
Action Manager – Editor Letters

• System Administrator Functions > Action Manager > Editor Letters
• Choose Default letter for event:

<table>
<thead>
<tr>
<th>Event</th>
<th>Managing Editor Letters</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Submission Sent to Publication</td>
<td>Journal Office Notice New Submission</td>
</tr>
<tr>
<td>New Child Submission Sent to Publication</td>
<td>Journal Office Notice New Child Submission</td>
</tr>
<tr>
<td>Author Agrees to Invitation</td>
<td>Editor Notice Author Agrees to Assignment</td>
</tr>
<tr>
<td>Author Declines Invitation</td>
<td>Editor Notice Author Declines Assignment</td>
</tr>
</tbody>
</table>