Invited Article Workflow in Editorial Manager

European Editorial Manager and ProduXion Manager User Group Meeting
London, 12-13 January 2017

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Dr. Jos Lenders, Associate Editor

Advanced Materials
Advanced Functional Materials
Advanced Healthcare Materials
Advanced Engineering Materials

Proposal Menu in Editorial Manager

- **Initiating *new* proposals**
- **Tracking *active* proposals**
  - invitations
    - outstanding, agreed/declined
  - submissions
    - in progress, received
- **Archiving *completed* proposals**
  - completed
  - withdrawn
- **Sending *reminders* (Reports)**
  - invited but no response yet
  - agreed but late submission
  - manually or automatically

Step 1: Initiating a new proposal

- Different **proposal types** can be set up and selected
    - e.g., *Article Invitation*
        - for a single author
    - *Special Issue Invitations*
        - for multiple authors

Initiate Proposal

Select an Article Type for the proposal, then enter a Proposal Title and other information.

* **Article Type:**

None
Article Invitation
Special Issue Invitations

Cancel

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Step 1: Initiating a new proposal

- Different **proposal types** can be set up and selected
  - e.g., *Article Invitation*
    - for a single author
  - *Special Issue Invitations*
    - for multiple authors
- **Article Type** can be pre-selected, or left for author
- **Title** has to be provided
  - working title, can be changed for submission
  - e.g., title of special issue
- **Target Publication Date, Volume, Issue** can be set (optional, not in continual)
- Proposal can be linked to **Section / Category**

Initiate Proposal

Select an Article Type for the proposal, then enter a Proposal Title and other information.

Pre-selecting an article type for invited submissions is optional. The 'Author Will Select' option allows the invited Author to select from a list of invited article types.

* Article Type:	Article Invitation
Pre-select Article Type for Invited Submissions generated from this Proposal:	Author Will Select / Invited Communication / Invited Review / Invited Progress Report / Invited Research News / Guest Editorial / Invited Essay / Response to Comment / Invited Comment
* Title:	Insert Special Character
Review on Advanced Materials for Solar Cells and Batteries by Professor X	
Target Publication Date:	(mm/dd/yyyy)
Target Publication Volume:	
Target Publication Issue:	
Author Response Due: Number of Days Author has to Respond to Invitation	0 — *A value of zero indicates the Response due date feature is not being used.*
Author Submission Due: Number of Days prior to Target Publication Date	0 — *A value of zero indicates the Submission due date feature is not being used.*

Cancel | Proceed and Build PDF | Proceed with no PDF | Assign to Myself and Invite Authors

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Step 2: Searching for and selecting authors

- From user database in EM using search criteria
- Register and Invite New Author
- **Author List File**
- Proposal is assigned own **manuscript number**, any resulting submission (*child manuscript*) will be assigned new manuscript number

Author Selection Summary – Manuscript adma.201606752
Review of Advanced Materials for Solar Cells and Batteries by Professor X

Manuscript Details

Author Search

Search My Publication

| Search for Authors |
| Search by Personal Classifications |
| Upload Author List |
| Search for Alternate Authors |
| Search for Alternate Authors by Personal Classifications |

Go

Selected Authors

Invited Authors

There are no Authors Invited for this submission

Alternate Authors

There are currently no Alternate Authors selected for this submission

Search for Authors – Manuscript adma.201606752
"Review of Advanced Materials for Solar Cells and Batteries by Professor X"

Manuscript Details ▽

Help with Searching   Insert Special Character

Criterion	Selector	Value	
Last Name	Contains	X	AND
First Name	Begins With	Professor	OR
E-mail Address	Is Equal To		

Clear   Search

Register and Invite New Author

Return to New Proposal Assignments

Return to Manage Proposals Menu
Return to Main Menu

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Step 2: Searching for and selecting authors

- From user database in EM using search criteria
- Register and Invite New Author
- **Author List File**
  - .txt or .csv file
    - LASTNAME
    - FIRSTNAME
    - EMAIL
    - TITLE (optional)

Upload Author List

Use this option to upload a list of potential Authors from a file which includes their First Name, Last Name, Email Address, and optionally, a description of the material they will be asked to author and an ORCID iD. (more...)

Browse your computer:

Choose File

Or Drag & Drop a File Here

No Author List File has been uploaded for this submission.

Author List (2016.12.05).csv - Microsoft Excel

	A	B	C	D
1	LASTNAME	FIRSTNAME	EMAIL	TITLE

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Step 2: Searching for and selecting authors

- From user database in EM using search criteria
- Register and Invite New Author
- **Author List File**
  - .txt or .csv file
  - useful for inviting multiple authors at once
  - matched with records in EM user database during import

Upload Author List

Use this option to upload a list of potential Authors from a file which includes their First Name, Last Name, Email Address, and optionally, a description of the material they will be asked to author and an ORCID iD. (more...)

Browse your computer:

Choose File

Or Drag & Drop a File Here

No Author List File has been uploaded for this submission.

Author Candidates

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.

Remove   Import

Invitation	FIRSTNAME	LASTNAME	EMAIL	ORCID	Title	NOTE	Ignore
True							☐
True							☐
True							☐
True							☐

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Step 2: Searching for and selecting authors

Invitation / Author Statistics are displayed during author selection:

- Numbers and dates outstanding / agreed / declined / un-invited invitations
- For agreed invitations, numbers and dates awaiting / received submissions
- **Cross-journal (portal-wide) statistics** also are provided

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Step 3: Sending the invitation letter

Useful merge fields:

- **%INVITATION_NOTES_TO _AUTHOR%**
  - info about scope, etc.
- **%INVITED_SUBMISSION_ RESPOND_DATE%**
  - response deadline
- **%INVITED_SUBMISSION_ DUE_DATE%**
  - submission deadline

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Step 3: Sending the invitation letter

Useful merge fields:

- %INVITATION_NOTES_TO_AUTHOR%
  - info about scope, etc.
- %INVITED_SUBMISSION_RESPOND_DATE%
  - response deadline
- %INVITED_SUBMISSION_DUE_DATE%
  - submission deadline

- Different (shared) *Author Invitation* **letters** can be set up in EM
- Letters can be **customized** before sending

Select Authors - Confirm Selection and Customize Letters

You have selected the following people as potential Authors. (more...)

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

Authors to Invite

Open Special Character Palette

Name			Invited Author Response Due Date	Author Submission Due Date	Do Not Invite
Jos Lenders	NOT IN USE Auth... / Author Invitation fo... / Author Uninvited N... / Author Invitation - / Author Invitation S... / Author Invitation N... / Author Invitation to... / Author Invitation to... / Author Invitation h... / Author Invitation - / Author Invitation - / Author Invitation - / S-Author Invitation...	Customize	01/31/2017 (mm/dd/yyyy)	05/31/2017 (mm/dd/yyyy)	☐

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Step 3: Sending the invitation letter

Useful merge fields:

- %INVITATION_NOTES_TO_AUTHOR%
  - info about scope, etc.
- %INVITED_SUBMISSION_RESPOND_DATE%
  - response deadline
- %INVITED_SUBMISSION_DUE_DATE%
  - submission deadline
- **Custom merge fields**
  - journal-specific info, etc.
  - used in shared letters

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Step 3: Sending the invitation letter

Useful merge fields:

- %INVITATION_NOTES_TO _AUTHOR%
  - info about scope, etc.
- %INVITED_SUBMISSION_ RESPOND_DATE%
  - response deadline
- %INVITED_SUBMISSION_ DUE_DATE%
  - submission deadline
- Custom merge fields
  - journal-specific info, etc.
  - used in shared letters
- **%ACCEPT_INVITATION%**
  - deep link to EM account
- **%DECLINE_INVITATION%**
  - deep link to EM account

From:	"Advanced Materials"<advmat@wiley-vch.de>
To:	Jos Lenders
Letter Purpose:	S-Author Invitation for Review or Progress Report
Letter Subject:	Invitation to contribute an article to %JOURNALFULLTITLE% (%LAST_NAME%)

The Editors assigned to the current version of the submission are shown below. 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:	

Letter Body: Insert Special Character | Insert Custom Merge Field   Open in New Window

We expect invited contributions to %JOURNALFULLTITLE% to become the most read and best cited papers that we publish. Therefore, I hope that you will accept this invitation to address our international audience, as I am sure that your article would generate much attention in the community.

I would be grateful if you could respond to this invitation by %INVITED_SUBMISSION_RESPOND_DATE%, and I would suggest a submission date of %INVITED_SUBMISSION_DUE_DATE%. However, by contacting the editorial office, a more suitable schedule can be arranged. I further would be more than happy to comment on the suitability of a proposed (sub)topic or working title.

If you would like to accept this invitation, please follow this link: %ACCEPT_INVITATION%

If you do not wish to contribute, you can decline by following this link: %DECLINE_INVITATION%

Alternatively, please log in to %JOURNAL_URL% with your username (%USERNAME%) and password, and agree or decline to submit via the "My New Invitations" link in your "Invited Submissions" menu. If you do not know your password, please contact the editorial office for assistance. You also may send us a short message in direct reply to this e-mail instead.

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Step 3: Sending the invitation letter

Useful merge fields:

- %INVITATION_NOTES_TO _AUTHOR%
  - info about scope, etc.
- %INVITED_SUBMISSION_ RESPOND_DATE%
  - response deadline
- %INVITED_SUBMISSION_ DUE_DATE%
  - submission deadline
- **Custom merge fields**
  - journal-specific info, etc.
  - used in shared letters
- **%ACCEPT_INVITATION%**
  - deep link to EM account
- **%DECLINE_INVITATION%**
  - deep link to EM account

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Step 4: Author agrees / declines to submit

- Deep link in invitation takes author to **EM user account**
- Invitation can be **agreed to or declined**

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Step 4: Author agrees / declines to submit

- Deep link in invitation takes author to **EM user account**
- Invitation can be **agreed to or declined**
- Once accepted, invited manuscript can be **submitted** through available link
- Invitation also can be agreed to **by proxy**

Invited Submissions

My Accepted Invitations (1)

New Author Invitations for

You have been invited to submit a manuscript. Please Agree or Decline to submit.

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

▣ Action	Manuscript Number	Article Type	Article Title	Current Status	Date Author Invited	Date Response Requested	Days Invitation Outstanding	Editor's Name
View Invitation Letter Agree to Submit Decline to Submit Send E-mail	adma.201606249	Article Invitation		Author Invited	18 Nov 2016	01 Dec 2016	31	Jos Lenders

Accepted Invitations for

You have agreed to submit an invited manuscript. Please click on 'Submit Invited Manuscript' when you are ready.

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

▣ Action	Manuscript Number	Article Type	Article Title	Date Author Invited	Date Author Accepted	Elapsed Days Since Acceptance Date	Author Submission Due Date	Editor's Name
View Invitation Letter Submit Invited Manuscript Send E-mail	adma.201606250	Article Invitation		18 Nov 2016	12 Dec 2016	7	01 May 2017	Jos Lenders

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Step 4: Author agrees / declines to submit

- **Pending Proposals** provides overview of all proposals
  - numbers of authors invited / accepting / declining / submissions, etc.

Pending Proposals - Jos Lenders

Contents: Proposals for which one or more Authors have been invited. These Proposals require one of the following actions: 1) View the status of Authors Invited or Invite additional Authors complete their work; 3) Set a Final Disposition. Use the up/down arrows to change the sort order.

Page: 1 of 1 (44 total proposals)   Display 100 ⌄ results

☐ Action ▲	Proposal Manuscript Number ▲▼	Proposal Article Type ▲▼	Proposal Title ▲▼	Section/ Category ▲▼	Initial Date of Proposal ▲▼	Editor Originating Proposal ▲▼	Handling Editor ▲▼	# of Authors Invited ▲▼	# of Authors Accepting ▲▼	# of Authors Declining ▲▼	# of Author Submissions ▲▼
View Proposal Details ▷ History File Inventory Edit Proposal Invite Authors View Related Submissions Set Final Disposition Similar Articles in MEDLINE PubMed - Title Search ISI Web of Knowledge Send E-mail	adfm.201604479	Special Issue Invitations			30 Aug 2016	Jos Lenders	Jos Lenders	18	17	0	2
Details ▷ History File Inventory Edit Proposal Invite Authors Set Final Disposition Similar Articles in MEDLINE PubMed - Title Search ISI Web of Knowledge Send E-mail	adfm.201504720	Article Invitation			03 Nov 2015	Jos Lenders	Jos Lenders	1	0	0	0

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Step 4: Author agrees / declines to submit

- **Pending Proposals** provides overview of all proposals
  - numbers of authors invited / accepting / declining / submissions, etc.
- **Details / Author Selection Summary** provides overview per proposal
  - due dates can be extended here

Sending reminder letters (through Reports)

- **Authors Invited – No Response**
  - if authors have been invited, but not agreed or declined to submit (yet)

Reports

Proposal Pipeline Report
Authors Invited - No Response
Author Invitation Status Report
Automated Author Invitation Reminder Report

Authors Invited - No Response Report

Please select the report parameters.

Handling Editor: Jos Lenders

○ Show all Invited Authors that are within 10 days of their Invitation Response Due Date.
○ Show all Invited Authors that are 7 days past the Invitation Response Due Date.
◉ Show all Invited Authors whose invitation response is due between 07/01/2016 and 12/31/2016 (mm/dd/yyyy)
○ Show all Invited Authors whose submission is due between 12/01/2016 and 12/31/2016 (mm/dd/yyyy)
○ Show all Invited Authors with a Target Publication date between 12/01/2016 and 12/31/2016 (mm/dd/yyyy)
○ Show Invited Authors for Target Publication Volume and Issue
○ Show all Invited Authors who have not yet submitted.

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Sending reminder letters (through Reports)

- **Authors Invited – No Response**
  - if authors have been invited, but not agreed or declined to submit (yet)
- **Author Invitation Status Report**
  - if authors have agreed to submit, but not submitted (yet)

Reports

Proposal Pipeline Report
Authors Invited - No Response
Author Invitation Status Report
Automated Author Invitation Reminder Report

Authors Invited - No Response Report

Please select the report parameters.

Handling Editor: Jos Lenders

○ Show all Invited Authors that are within 10 days of their Invitation Response Due Date.
○ Show all Invited Authors that are 7 days past the Invitation Response Due Date.
◉ Show all Invited Authors whose invitation response is due between 07/01/2016 and 12/31/2016 (mm/dd/yyyy)
○ Show all Invited Authors whose submission is due between 12/01/2016 and 12/31/2016 (mm/dd/yyyy)
○ Show all Invited Authors with a Target Publication date between 12/01/2016 and 12/31/2016 (mm/dd/yyyy)
○ Show Invited Authors for Target Publication Volume and Issue
○ Show all Invited Authors who have not yet submitted.

Author Invitation Status Report

This report displays all Invited Authors who have accepted an invitation but have not yet submitted a manuscript, based on the parameters below:

Handling Editor: Jos Lenders

○ Show all Invited Authors who accepted the invitation more than 7 days ago.
◉ Show all Invited Authors whose submission is due between 07/01/2016 and 12/31/2016 (mm/dd/yyyy)
○ Show all Invited Authors with a Target Publication date between 12/01/2016 and 12/31/2016 (mm/dd/yyyy)
○ Show Invited Authors for Target Publication Volume and Issue

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Sending reminder letters (through Reports)

- A selection of authors can be made from the search results
- Different (shared) *Author Reminder* **letters** can be set up in EM
- Letters additionally can be **customized** per author
- Letters can be sent **immediately**, or scheduled to be sent **at any later time**

Authors Invited - No Response Report

Select a letter to send to the Authors.

Proposal - Unanswered Invitation Reminder

Cancel | Customize Letter | Send Reminders

Author Invitation Status Report

Select a letter to send to the Authors.

Proposal - Accepted Invitation Reminder

Cancel | Customize Letter | Send Reminders

Send Reminder	Manuscript Number	Article Type	Manuscript Title	Invited Author Name	Phone Number	Handling Editor Name	Date Invited	Elapsed Days	Invitation Response Due Date	Submission Due Date
☑	adma.201606249 Details History	Article Invitation				Jos Lenders	18 Nov 2016	26	01 Dec 2016	01 May 2017
☑	adma.201606235 Details History	Article Invitation				Jos Lenders	18 Nov 2016	26	01 Dec 2016	01 May 2017
☑	adma.201606246 Details History	Article Invitation				Jos Lenders	18 Nov 2016	26	01 Dec 2016	01 May 2017
☑	adma.201606240 Details History	Article Invitation				Jos Lenders	18 Nov 2016	26	01 Dec 2016	01 May 2017
☑	adma.201606244 Details History	Article Invitation				Jos Lenders	18 Nov 2016	26	01 Dec 2016	01 May 2017
☑	adma.201606226 Details History	Article Invitation				Jos Lenders	18 Nov 2016	26	01 Dec 2016	01 May 2017
☑	adma.201606255 Details History	Article Invitation				Jos Lenders	18 Nov 2016	26	01 Dec 2016	01 May 2017

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Sending reminder letters (through Reports)

- Reminders also can be scheduled to be sent **automatically**
  - author invited, but no response yet
    - x days before or after **response due date**
  - author agreed, but no submission yet
    - x days before or after **submission due date**

Reports

Proposal Pipeline Report
Authors Invited - No Response
Author Invitation Status Report
Automated Author Invitation Reminder Report

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.

	Reminder Name	Reminder Type	Number of Days	Reminder Creator
	Invitation Reminder - before subm - due 28 days	Reminder Before Submission Due Date (Proposal)	28	Advanced Biosystems Editorial Office
	Invitation Reminder - before subm - due 7 days	Reminder Before Submission Due Date (Proposal)	7	Advanced Biosystems Editorial Office
	Invitation Reminder - late subm - 14 days late	Reminder Past Submission Due Date (Proposal)	14	Advanced Biosystems Editorial Office
	Invitation Reminder - late subm - 28 days late	Reminder Past Submission Due Date (Proposal)	28	Advanced Biosystems Editorial Office
	Invitation Reminder - no response - 21 days late	Reminder Past Invitation Response Due Date (Proposal)	21	Advanced Biosystems Editorial Office
	Invitation Reminder - no response - 7 days late	Reminder Past Invitation Response Due Date (Proposal)	7	Advanced Biosystems Editorial Office

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Thank you!

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Dr. Jos Lenders, Associate Editor

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