

# Welcome to EMUG 2015



# Editors on Steroids

Sally Ubnoske, Senior Business Systems Analyst

[subnoske@ariessys.com](mailto:subnoske@ariessys.com)

[bit.ly/EMUG15-EOS](http://bit.ly/EMUG15-EOS)

# Agenda

- Creating an Editor Assignment Chain today
- *New* method to create the entire Editor Chain in one action (EM v. 12.1)
- Modifying an Editor Assignment Chain today
- *New* method to replace or remove an assigned editor for any step of the Editor Chain (EM v. 12.2)

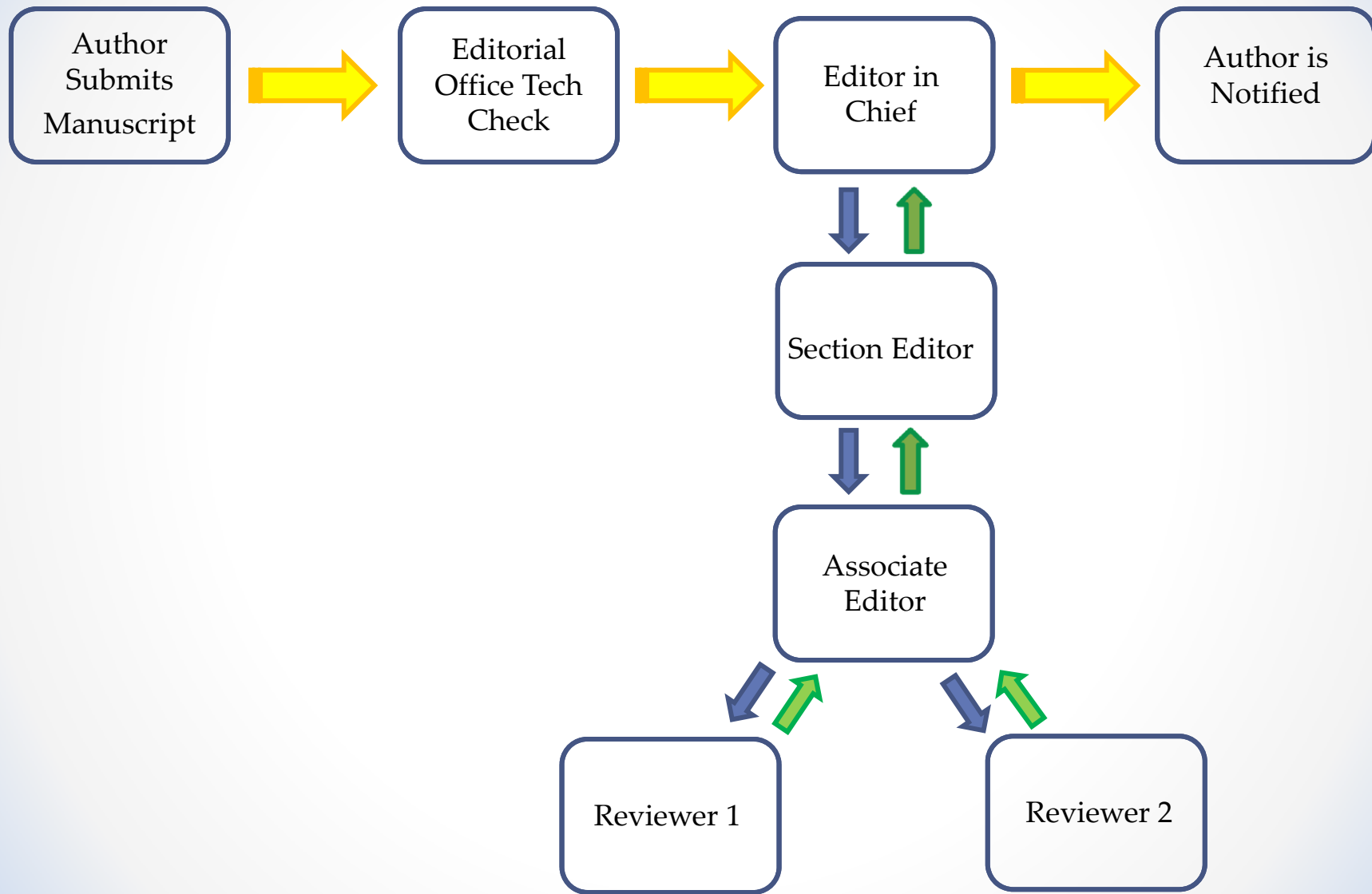
# Creating an Editor Chain



For New or Revised Submissions



# Sample Peer Review Workflow



# Creating an Editor Chain Today

- Peer Review workflow is based on the assumption that one Editor assigns the submission on to another Editor
- Each Editor in turn may assign the submission on to another Editor
- In this way, the individual Editors create a 'Decision Chain' (Editor Assignment Chain) through a series of discrete assignments
- Once Editors start to submit recommendations the submission returns up the chain that was built incrementally

# Creating an Editor Chain Today

## Editor 'To-Do' List

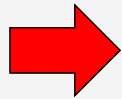
My Pending Assignments (27)

[Editorial Submissions in Progress](#) (2)

[Transferred Submissions](#) (3)

New Submissions (0)

Revised Submissions (0)



[New Submissions Requiring Assignment](#) (1)

Revised Submissions Requiring Assignment (0)

Direct-to-Editor New Submissions (0)

Direct-to-Editor Revised Submissions (0)

[Submissions Needing Approval by Editor](#) (1)

[Submissions Sent Back to Author for Approval](#) (2)

An Editorial Office user clicks the Assign Editor link

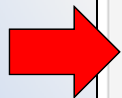
## New Submissions Requiring Assignment - Sally Editor

**Contents:** These are the new submissions that require an Editor Assignment. Use the up/down arrows to change the sort order.

Page: 1 of 1 (1 total submissions)

Display  results per page.

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (40%)</a> <a href="#">Details ▼</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Information</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Send Back to Author</a> <a href="#">Remove Submission</a> <a href="#">Classifications</a> <a href="#">Assign Editor</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>		Original Study		EMUG 2015 - Editors on Steroids	<a href="#">Buzz Lightyear Aldrin, PhD</a> ▼ !	May 11 2015 10:43AM	May 11 2015 10:43AM	Submitted to Journal



# Creating an Editor Chain Today

**Assign Editor**

**Title:** EMUG 2015 - Editors on Steroids

Use the search tool to identify the most appropriate person to handle this submission.

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

[Insert Special Character](#)  [Value Options](#)

(	Criterion	Is/Is not	Selector	Value	)	
<input type="checkbox"/>	Last Name	is	Begins With	e	<input type="checkbox"/>	
						<input type="button" value="Add"/>

The Editorial Office searches for an Editor. . .

# Creating an Editor Chain Today

## Assign Editor

**Title:** EMUG 2015 - Editors on Steroids

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you to choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

Page: 1 of 1 (5 total People Matches) Display  results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input checked="" type="radio"/>	Editor in Chief	<a href="#">Chief Editor</a>	5	0		Yes
<input type="radio"/>	Managing Editor	<a href="#">Sally Editor, PhD</a>	24	0		Yes
<input type="radio"/>	Section Editor	<a href="#">David Editor</a>	16	0		Yes
<input type="radio"/>	Section Editor	<a href="#">John Editor</a>	8	0		Yes
<input type="radio"/>	Section Editor	<a href="#">Michael Editor</a>	17	0		Yes

Page: 1 of 1 (5 total People Matches) Display  results per page.

The Editorial Office selects an Editor and sends either the default letter or a customized letter . . .



# Creating an Editor Chain Today

## 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
<a href="#">Chief Editor (Editor in Chief)</a>	Editor Assignment	<a href="#">Customize</a>	<input type="checkbox"/>

Cancel

Confirm Selections and Send Letters

The Editorial Office clicks the Customize link to edit the selected letter . . .

# Creating an Editor Chain Today

**Editor Assignment Confirmation**

Chief Editor has been assigned to manuscript number SALLYDEV121-D-15-00004.

E-mail has been sent to the following individuals notifying them of the Editor assignment:

Chief Editor (Editor in Chief)

Close

. . . And the first Editor is assigned!



# Creating an Editor Chain Today

The screenshot displays a web interface for managing an editor chain. At the top, there are three navigation tabs: "Editorial", "Proposal Menu", and "Production Tasks". On the left side, there is a sidebar titled "Managing Editor Main Menu". The main content area is divided into several sections:

- Search:** A section with a search bar and two links: [Search Submissions](#) and [Search People](#).
- Editor 'To-Do' List:** A section containing a list of tasks:
  - My Pending Assignments (27)
  - [Editorial Submissions in Progress \(1\)](#)
  - [Transferred Submissions \(1\)](#)
  - New Submissions (0)
- View All Assigned:** A section with a red arrow pointing to two links:
  - [View All Assigned Submissions \(54\)](#)
  - [View All Assigned Submissions being Edited \(15\)](#)

*Partial page displayed*


The Editorial Office locates the submission . . .

# Creating an Editor Chain Today

**View All Assigned Submissions - Sally Editor, PhD**

**Contents:** This page lists all submissions that have been assigned to an Editor, for which the Editor's decision has not yet been made. This includes submissions with invited Reviewers, submissions out for review, submissions requiring a decision, and submissions which have a subordinate Editor's decision but not a decision from the top Editor in the decision-making chain.

Page: 1 of 1 (54 total submissions) Display  results per page.

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Editor with Current Responsibility ▲▼	Review Status	View Decision ▲▼
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (40%)</a> <a href="#">Details</a> ▼  <a href="#">History</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a>											

**Blinded Editors:** [Blinded Editors](#)

**Editors** [Top](#)

**Name:** Chief Editor ▼ [Proxy]

**Role:** Editor in Chief

**Date Assigned:** May 11 2015 10:48AM

**Date Completed:**

**Elapsed Days:** 0

**Recommendation:**

The Editorial Office can go to the *Details* page to proxy in as the first assigned Editor . . .

# Creating an Editor Chain Today

## Proxying for Chief Editor - Editor in Chief

### Editor in Chief Main Menu

Search

[Search Submissions](#)

### Editor 'To-Do' List

My Pending Assignments (5)

[New Assignments \(3\)](#)

[Submissions with Required Reviews Complete \(1\)](#)

Submissions Requiring Additional Reviewers (0)

Submissions with One or More Late Reviews (0)

[Submissions with Active Discussions \(1\)](#)



## Proxying for Chief Editor - Editor in Chief

To exit proxy mode, click 'Logout'

### New Editor Assignments - Chief Editor

**Contents:** These are submissions that have been Assigned to the Editor. They require one of the following: another Editor assignment, Reviewer invitations, or Decision. Use the up/down arrows to change the sort order.

Page: 1 of 1 (3 total submissions)

Display  results per page.

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Editor Decision ▲▼
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Assign Editor</a> <a href="#">Invite Reviewers</a> <a href="#">Submit Editor's Decision and Comments</a> <a href="#">Send E-mail</a>	SALLYDEV120-D-15-00015	Original Study		EMUG 2015 - Editors on Steroids	<a href="#">Buzz Lightyear Aldrin, PhD</a>	May 11 2015 10:43AM	May 11 2015 10:48AM	With Editor	





# Creating an Editor Chain Today

## Assign Editor

**Manuscript Number:**  
SALLYDEV121-D-15-00004

**Title:** EMUG 2015 - Editors on Steroids

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you to choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

Cancel Send Custom Letters Send Default Letters

Search Again

Page: 1 of 1 (5 total People Matches) Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
	Editor in Chief <i>(This editor is already assigned to the current submission)</i>	<a href="#">Chief Editor</a>	8	0		Yes
<input type="radio"/>	Managing Editor	<a href="#">Sally Editor, PhD</a>	28	0		Yes
<input type="radio"/>	Section Editor	<a href="#">David Editor</a>	17	0		Yes
<input type="radio"/>	Section Editor	<a href="#">John Editor</a>	8	0		Yes
<input checked="" type="radio"/>	Section Editor	<a href="#">Michael Editor</a>	17	0		Yes

Page: 1 of 1 (5 total People Matches) Display 10 results per page.

Search Again

Cancel Send Custom Letters Send Default Letters

While proxied in as the first assigned Editor, the Editorial Office searches for and selects an Editor. . .

# Creating an Editor Chain Today

## Assign Editor

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** EMUG 2015 - Editors on Steroids

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you to choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

Page: 1 of 1 (5 total People Matches)      Display  results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Editor in Chief <small>(This editor is assigned to the submission)</small>	<a href="#">Chief Editor</a>	6	0		Yes
<input type="radio"/>	Managing Editor					
<input type="radio"/>	Section Editor					
<input type="radio"/>	Section Editor					
<input checked="" type="radio"/>	Section Editor					

### Editor Invitation Confirmation

Michael Editor has been invited to handle manuscript number SALLYDEV121-D-15-00004.

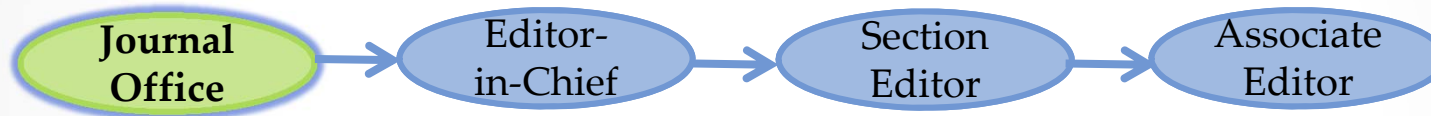
E-mail has been sent to the following individuals notifying them of the Editor invitation:

Michael Editor (Section Editor)

The Editorial Office invites the next Editor – and then starts all over again to build the complete Editor Assignment Chain.

# What's the Problem?

- Most publications use the same sequence of Editor Assignments to create an Editor Chain each time they process a submission



- Some publications rely on the Editorial Office to create the Chain to reduce the Editors' workload
- This means that the EO must proxy in for each Editor in turn in order to build the complete Editor Chain
- **What a tedious process!**



# What if?

- The Editor Assignment Chain could be *created* in one action on a single page?
- Publications could create various templates that could then be associated with different Article Types and then use that template to assign specific Editors?
- A template could be created to preselect an Editor Role and default assignment letter for each step of the Chain?
- Revisions could be assigned using a template?

**A new 'Assign Editor Chain' Feature is available in V. 12.1!**

# New 'Assign Editor Chain' Feature



- New 'Assign Editor Chain' functionality is coming in EM v. 12.1
- System Administrators can create 'Assignment Chain Templates' in PolicyManager
- Templates can then be associated with individual Article Types
- When the EO clicks the Assign Editor link a new page is displayed showing the suggested Editor Roles and Assignment Letters
- The EO can select specific Editors, add or remove steps and customize Assignment Letters



# New 'Assign Editor Chain' Feature

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (100%)</a> <a href="#">Details</a> ▾ <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Information</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Classifications</a> <a href="#">Remove Submission</a> <a href="#">Send Back to Author</a> <a href="#">Assign Editor</a> ← <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>			Buzz Lightyear Aldrin ▽!	New "Assign Editor Chain" Feature!	Original Study				Submitted to Journal	May 13 2015 5:06PM	May 13 2015 5:06PM

The Editorial Office clicks the Assign Editor Action Link, as in current functionality.

# New 'Assign Editor Chain' Feature

## Assign Editor Chain

**Title:** New "Assign Editor Chain" Feature

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

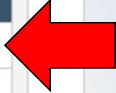
[Assign Individual Editor](#)

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	<input type="text"/>	Editor Assignment <a href="#">Customize</a>
	Editor 2	Section Editor	<a href="#">Editor Search</a>	Editor Assignment <a href="#">Customize</a>
	Editor 3	Associate Editor	<a href="#">Editor Search</a>	Editor Invitation <a href="#">Customize</a>

[Associate Editor](#) [Add to Chain](#)

[Cancel](#) [Create Chain and Send Letters](#)



- The new *Assign Editor Chain* page is displayed based on the template associated with the submission's Article Type
- Each step is associated with a suggested Editor Role
- The Role determines how the Editors to be assigned are identified:
  - A combo box allows users to select from Editors in a dropdown list
  - The [Editor Search](#) link brings the user to a search interface
- The template's default Assignment Letter is displayed

# New 'Assign Editor Chain' Feature

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	<input type="text"/>	Editor Assignment <input type="button" value="Customize"/>
	Editor 2	Section Editor <input type="button" value="v"/>	Editor Chief Wayne John	Editor Assignment <input type="button" value="Customize"/>
	Editor 3	Associate Editor <input type="button" value="v"/>	<a href="#">Editor Search</a>	Editor Invitation <input type="button" value="Customize"/>

Associate Editor

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief <input type="button" value="v"/>	way <input type="button" value="x"/>	Editor Assignment <input type="button" value="Customize"/>
	Editor 2	Section Editor <input type="button" value="v"/>	Wayne John <a href="#">Editor Search</a>	Editor Assignment <input type="button" value="Customize"/>
	Editor 3	Associate Editor <input type="button" value="v"/>	<a href="#">Editor Search</a>	Editor Invitation <input type="button" value="Customize"/>

Associate Editor

The mechanism used to identify the appropriate Editor for the assignment is defined by the Editor Role.

# New 'Assign Editor Chain' Feature

**Assign Editor Chain: Search**

**Title:** New "Assign Editor Chain" Feature


Use the search tool to identify the most appropriate person for this step in the chain.

**Editor 2:** Section Editor

Click the Blind Editors link to block access to this submission for one or more Editors. [Blind Editors](#)

[Insert Special Character](#)  [Value Options](#)

(	Criterion	Is/Is not	Selector	Value	)		
<input type="checkbox"/>	Editor Role	is	Equal To	Section Editor	<input type="checkbox"/>	AND	<input type="button" value="Remove"/>
<input type="checkbox"/>	Last Name	is	Begins With	e	<input type="checkbox"/>		<input type="button" value="Remove"/>



The Role for the step in the Chain is preselected but can be changed on the *Assign Editor Chain: Search* page.

# New 'Assign Editor Chain' Feature

**Assign Editor Chain: Select**

**Title:** New "Assign Editor Chain" Feature

The following have been identified as candidates for this Step in the Editor Chain. Select the Editor to return the Assign Editor Chain page where you can select and customize the Assignment Letter, if appropriate.

**Editor 2:** Section Editor

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

Cancel Assign Selected Editor

Search Again

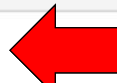
Page: 1 of 1 (3 total People Matches) Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Section Editor	<a href="#">David Editor</a>	17	0		Yes
<input type="radio"/>	Section Editor	<a href="#">John Editor</a>	8	0		Yes
<input checked="" type="radio"/>	Section Editor	<a href="#">Michael Editor</a>	18	0		Yes

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

Search Again

Cancel Assign Selected Editor



When the Editor to be assigned is selected, the user clicks the 'Assign Selected Editor' button.



# New 'Assign Editor Chain' Feature

### Assign Editor Chain

**Title:** New "Assign Editor Chain" Feature

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

#### Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Wayne John	Editor Assignment <a href="#">Customize</a>
	Editor 2	Section Editor	Michael Editor <a href="#">[Search]</a>	Editor Assignment <a href="#">Customize</a>
	Editor 3	Associate Editor	Harry Editor <a href="#">[Search]</a>	Editor Invitation <a href="#">Customize</a>

Associate Editor [Add to Chain](#)

[Cancel](#) [Create Chain and Send Letters](#)

The selected Editor is now displayed for the step in the Editor Assignment Chain, and the assigning Editor can click Customize to personalize the letter.

# New 'Assign Editor Chain' Feature

## Customize Editor Assignment Letter

**Wayne John  
(Editor in Chief)**

Cancel

Preview Letter

Submit

From: "My Journal" <trash1@ariessc.com>

To: [John Wayne](#)

Letter Purpose: Editor Assignment

Letter Subject:

Letter Body: [Insert Special Character](#) | [Insert Custom Merge Field](#)  
[Open in New Window](#)

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

Dear %TITLE% %LAST\_NAME%,

I am passing the above article to you for handling. Please log onto Editorial Manager as an editor to view the details and PDF.

Here are the Author's suggestions for Reviewers:  
%SUGGESTED\_REVIEWERS%

%JOURNAL\_URL%  
username: %USERNAME%  
password: %PASSWORD%

Cancel

Preview Letter

Submit

# New 'Assign Editor Chain' Feature

## Assign Editor Chain

**Title:** New "Assign Editor Chain" Feature

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

### Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Wayne John	Editor Assignment <a href="#">Customize*</a>
	Editor 2	Section Editor	Michael Editor <a href="#">[Search]</a>	Editor Assignment <a href="#">Customize</a>
	Editor 3	Associate Editor	Harry Editor <a href="#">[Search]</a>	Editor Invitation <a href="#">Customize</a>

[Associate Editor](#)  
Conference Editor  
Editor in Chief  
Editorial Assistant  
Managing Editor  
Section Editor  
Special Issue Editor

[Add to Chain](#)

[Cancel](#) [Create Chain and Send Letters](#)

Additional 'Editor Steps' can be added to the Chain by selecting a Role and clicking the 'Add to Chain' button.

# New 'Assign Editor Chain' Feature

### Assign Editor Chain

**Title:** New "Assign Editor Chain" Feature

Select the correct Editor to be used at each step of the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

#### Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Wayne John	Editor Assignment <a href="#">Customize*</a>
	Editor 2	Section Editor	Michael Editor <a href="#">[Search]</a>	Editor Assignment <a href="#">Customize</a>
	Editor 3	Associate Editor	Harry Editor <a href="#">[Search]</a>	Editor Invitation <a href="#">Customize</a>
	Editor 4	Associate Editor	<a href="#">Editor Search</a>	None <a href="#">Customize</a>

[Associate Editor](#) [Add to Chain](#)

[Cancel](#) [Create Chain and Send Letters](#)

If the proposed Editor or Role is invalid, an error icon is displayed and the 'Create Chain and Send Letters' button is disabled.

# New 'Assign Editor Chain' Feature

### Assign Editor Chain

**Title:** New "Assign Editor Chain" Feature

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

#### Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Wayne John	Editor Assignment
	Editor 2	Section Editor	Michael Editor	Editor Assignment
	Editor 3	Associate Editor	Harry Editor	Editor Invitation
	This Role cannot Assign other Editors.		Editor Search	None

[Associate Editor](#) [Add to Chain](#)

[Cancel](#) [Create Chain and Send Letters](#)

	Editor 3	Associate Editor	Harry Editor
	This Role cannot Assign other Editors.		<a href="#">Editor Search</a>

Informational text is displayed when the user hovers over the error icon. In this example, the Role selected for Editor 3 does not have RoleManager permission to assign other Editors, and must be the last Editor in the Chain.



# New 'Assign Editor Chain' Feature

### Assign Editor Chain

**Title:** New "Assign Editor Chain" Feature

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

**Assign Individual Editor**

#### Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Wayne John	Editor Assignment
	Editor 2	Section Editor	Michael Editor <a href="#">[Search]</a>	Editor Assignment
	Editor 3	Associate Editor	Harry Editor <a href="#">[Search]</a>	Editor Invitation
	Editor 4	Associate Editor	<a href="#">Editor Search</a>	None

Associate Editor [Add to Chain](#)

[Cancel](#) [Create Chain and Send Letters](#)

If the logged-in user prefers, he or she can click the 'Assign Individual Editor' button to assign only the first Editor, instead of assigning the entire Chain.

# New 'Assign Editor Chain' Feature

**Assign Editor**

**Title:** New "Assign Editor Chain" Feature

Use the search tool to identify the most appropriate person to handle this submission.

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

[Insert Special Character](#)  [Value Options](#)

(	Criterion	Is/Is not	Selector	Value	)
<input type="button" value="v"/>	Last Name <input type="button" value="v"/>	is <input type="button" value="v"/>	Begins With <input type="button" value="v"/>	e <input type="text"/>	<input type="button" value="v"/>
					<input type="button" value="Add"/>

After clicking the 'Assign Individual Editor' button, the user is prompted to select the first assigned Editor.



# New 'Assign Editor Chain' Feature

**Assign Editor**

**Title:** New "Assign Editor Chain" Feature

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you to choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

Cancel Send Custom Letters Send Default Letters

Search Again

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

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Associate Editor	<a href="#">Harry Editor</a>	0	0		Yes
<input type="radio"/>	Editor in Chief	<a href="#">Chief Editor</a>	8	0		Yes
<input checked="" type="radio"/>	Managing Editor	<a href="#">Sally Editor, PhD</a>	28	0		Yes
<input type="radio"/>	Section Editor	<a href="#">David Editor</a>	17	0		Yes
<input type="radio"/>	Section Editor	<a href="#">John Editor</a>	8	0		Yes
<input type="radio"/>	Section Editor	<a href="#">Michael Editor</a>	18	0		Yes

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

Search Again

Cancel Send Custom Letters Send Default Letters

After clicking the 'Assign Individual Editor' button, the 'Assign Editor' page displays Editors with permission to receive assignments – not just Editors with a particular Role.

# New 'Assign Editor Chain' Feature

## **Editor Assignment Confirmation**

Sally Editor, PhD has been assigned to manuscript number SALLYDEV121-D-15-00005.

E-mail has been sent to the following individuals notifying them of the Editor assignment:

Sally Editor, PhD (Managing Editor)

Close

When the user chooses to assign just the first Editor, the selected Editor is assigned as in current functionality.

# New 'Assign Editor Chain' Feature

### Assign Editor Chain

**Manuscript Number:**  
SALLYDEV112-D-14-00056R1

**Title:** Testing the Editor Chain

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

#### Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Editor Chief	Editor Assignment <a href="#">Customize</a>
	Editor 2	Section Editor	David Editor <a href="#">[Search]</a>	Editor Assignment <a href="#">Customize</a>
	Editor 3	Section Editor	David Editor <a href="#">[Search]</a>	None <a href="#">Customize</a>

Associate Editor  [Add to Chain](#)

#### Define Initial Editor Assignment Chain

	Step	Role
	Editor 1	Editor in Chief
	Editor 2	Section Editor
	Cannot assign a person twice.	

The 'Assign Editor Chain' page does not allow an individual Editor to be assigned to more than one step in the Chain.

# 'Assign Editor Chain' Feature

### Assign Editor Chain

**Title:** EMUG 2015 is Great!

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

#### Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	John Wayne	Editor Assignment
	Editor 2	Section Editor	Editor Search	Editor Assignment
	Editor 3	Associate Editor	Editor Search	Editor Invitation

[Associate Editor](#) [Add to Chain](#)

Role	Editor
Editor in Chief	John Wayne

If only one registered user has the selected Editor Role, his or her name is displayed as plain text in the 'Editor' column.

# 'Assign Editor Chain' Feature

**Blinded Editors:**

Chief Editor, Editor in Chief; John Wayne, Editor in Chief [Blinded Editors](#)

## Assign Editor Chain

**Manuscript Number:**  
SALLYDEV112-D-14-00056R1

**Title:** Testing the Editor Chain

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

### Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	No users have this Role	Editor Assignment <a href="#">Customize</a>
	Editor 2	Section Editor	<a href="#">Editor Search</a>	Editor Assignment <a href="#">Customize</a>
	Editor 3	Associate Editor	<a href="#">Editor Search</a>	Editor Invitation <a href="#">Customize</a>

Associate Editor

[Add to Chain](#)

[Cancel](#)

[Create Chain and Send Letters](#)

Editors who have been 'blinded' to the submission are not displayed in the 'Editor' combo box and do not appear in search results.

# 'Assign Editor Chain' Configuration

- *PolicyManager*
  - *Define Editor Assignment Chain Templates* page
    - Create Templates
  - *Edit Article Type* page
    - Select Editor Assignment Chain Template per Article Type
  - *Set Editor Assignment Options* page (Revisions)
    - Revisions go to 'Revised Submissions' or 'Revised Submissions Requiring Assignment' folder
- *RoleManager – Editor Role*
  - Select or Search for Editor to assign

# 'Assign Editor Chain' Configuration

**PolicyManager Main Menu**

---

[Expand All](#)    [Collapse All](#)

- ⊕ Registration and Login Policies
- ⊕ Status Policies
- ⊕ Submission Policies
- ⊕ Questionnaire Policies
- ⊕ Additional Data Policies
- ⊖ Editor Assignment Policies
  - [Set Editor Assignment Options](#) ←
  - [Define Editor Assignment Chain Templates](#) ←
  - [Set Editor Rotation Participants](#)
  - [Configure Automated Summary Reminders](#)
- ⊕ Reviewer and Editor Form Policies
- ⊕ E-mail and Letter Policies
- ⊕ General Policies
- ⊕ Discussion Forums
- ⊕ Linked Submissions Policies
- ⊕ Conference Submission Policies
- ⊕ Transmittal Policies
- ⊕  ProduXion Manager



# 'Assign Editor Chain' Configuration

## Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

**Current Editor Assignment Chain Template List**

[+ Add Another Editor Assignment Chain Template](#)

*There are currently no Editor Chain Templates in the list*

[+ Add Another Editor Assignment Chain Template](#)

Close












[Edit Article Types](#)

No 'Assignment Chain Templates' are defined upon upgrade.

# 'Assign Editor Chain' Configuration

## Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor Assignment Chain Template List		+ Add Another Editor Assignment Chain Template
	 <b>Standard Three Editor Chain</b>	
	  <b>Two Editor Chain for Rapid Reports</b>	
	  <b>Three Editor Chain for Invited Submissions</b>	
	  <b>Two Editor Chain for Rapid Communications</b>	
+ Add Another Editor Assignment Chain Template		






Close

[Edit Article Types](#)

# 'Assign Editor Chain' Configuration

**Define Editor Assignment Chain Templates**

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor Assignment Chain Template	View Editor Assignment Chain Template Details	Chain Template
 Standard Three Editor Chain	 Standard Three Editor Chain	
 Two Editor Chain		
 Three Editor Chain		
 Two Editor Chain		

[+ Add Another Editor Assignment Chain Template](#)

Step	Editor Role	Assignment Letter	Method
Editor 1	Editor in Chief	Editor Assignment	Select
Editor 2	Section Editor	Editor Assignment	Search
Editor 3	Associate Editor	Editor Invitation	Search

Click the glasses icon  to view an existing 'Assignment Chain Template'.

# 'Assign Editor Chain' Configuration

Current Editor Assignment C

Standard Th

Two Editor C

Three Editor

Two Editor C

+ Add Another Editor Assign

**Edit Editor Assignment Chain Template Details**

Standard Three Editor Chain

[Open Special Character Palette](#)

**Description\*** Standard Three Editor Chain x

	Role	Assignment Letter
☰	Editor in Chief	Editor Assignment ▼
☰	Section Editor	Editor Assignment ▼
☰	Associate Editor	Editor Invitation ▼

Associate Editor ▼

Click the pencil icon  to edit an 'Assignment Chain Temple'.

# 'Assign Editor Chain' Configuration

**Edit Editor Assignment Chain Template Details**

Standard Three Editor Chain

[Open Special Character Palette](#)

**Description\*** Standard Three Editor Chain

	Role	Assignment Letter
☰	Editor in Chief	Editor Assignment
☰	Section Editor	Editor Assignment
☰	Associate Editor	Editor Invitation
☰	Section Editor	This Role cannot Assign other Editors

Section Editor

The Editor Chain template must be valid in order for it to be saved. In this example, the Associate Editor does not have permission to assign other Editors and must be the last Editor in the Chain.

# 'Assign Editor Chain' Configuration

The screenshot shows a web interface for configuring editor assignment chains. A dialog box titled "Edit Editor Assignment Chain Template Details" is open, displaying a "Standard Three Editor Chain" template. The dialog includes a "Cancel" icon (a left-pointing arrow) and a "Confirm Cancel" warning box that asks, "Are you sure you wish to discard your changes?". The warning box has "OK" and "Cancel" buttons. The background shows a list of editor assignments with roles like "Editor in", "Section E", and "Section E".

Role
Editor in
Section E
Section E

The logged-in user can click the 'Cancel' icon  to return to the 'Define Editor Assignment Chain Templates' page.

# 'Assign Editor Chain' Configuration

The screenshot displays the 'Enter Editor Assignment Chain Template Details' dialog box. The 'Description\*' field contains the text 'A Brand New EMUG 2015 Editor Chain'. Below the description is a message box that reads 'There are currently no Editor Roles in the Chain'. A dropdown menu is open, showing a list of roles: Associate Editor, Conference Editor, Editor in Chief (highlighted), Editorial Assistant, Managing Editor, Section Editor, and Special Issue Editor. An 'Add to Chain' button is located to the right of the dropdown. The background shows a list of existing editor assignments, including 'Standard Th', 'Two Editor C', 'Three Editor', and 'Two Editor C'. A 'Close' button is at the bottom of the dialog, and a link 'Edit Article Types' is at the bottom of the page.

To create a new template, enter a 'Description' for the template and select a Role to add to the Chain.



# 'Assign Editor Chain' Configuration

Current Editor Assignment C

Standard Th

Two Editor C

Three Editor

Two Editor C

+ Add Another Editor Assign

**Enter Editor Assignment Chain Template Details**

[Open Special Character Palette](#)

**Description\*** A Brand New EMUG 2015 Editor Chain

Role	Assignment Letter
Editor in Chief	None
	Editor Assignment
	Editor Invitation
	Editor Notice an Assignment was Undone
	Editor Assignment Undone
	Editor Assignment - Proposal

Editor in Chief



Close

[Edit Article Types](#)

Continue adding Roles until the Chain template is complete. The Editor order does not matter yet – you will be able to sort the Editors after adding them to the template.








# 'Assign Editor Chain' Configuration

**Edit Editor Assignment Chain Template Details** ✕


   **A Brand New EMUG 2015 Editor Chain**

[Open Special Character Palette](#)

**Description\***

	Role	Assignment Letter
 	Editor in Chief	<input type="text" value="Editor Assignment"/> <span>▼</span>
 	Section Editor	<input type="text" value="Editor Invitation"/> <span>▼</span>
 	Special Issue Editor	<input type="text" value="None"/> <span>▼</span>
 	Special Issue Editor	<input type="text" value="Editor in"/> <span>▼</span>




▼



**Grab the blue gripper bar to sort the Editor Roles in the template.**










# 'Assign Editor Chain' Configuration


**Edit Editor Assignment Chain Template Details** ✕

   **A Brand New EMUG 2015 Editor Chain**

[Open Special Character Palette](#)

**Description\***

	Role	Assignment Letter
 	Editor in Chief	<input type="text" value="Editor Assignment"/> 
 	Special Issue Editor	<input type="text" value="Editor Invitation"/> 
 	Section Editor	<input type="text" value="Editor Invitation"/> 



The newly defined sort order is displayed.

# 'Assign Editor Chain' Configuration

**Edit Article Type**

**Article Type:**   
Maximum Article Type name is 75 characters.  
*Warning: changing the Article Type name will apply the name change to all submissions.*

**Family:** Regular      **Editor Use Only:**

**Hide** When you **Hide** an Article Type, the Article Type will be deactivated (not available for new submissions)

Allow file uploads from arXiv.org server

**Similarity Check:**

- Send Reviewer PDF on Initial Submission
- Send Reviewer PDF on First Revision
- Send Reviewer PDF on Final Disposition to Accept

*You must also set up Automatic Transfer to a checking service on the Configure Similarity Check page. Editor and Publisher Roles can be configured to send files by Automatic Transfer from the File Inventory or Technical Check pages even if you do not enable the options on this page.*

The System Administrator can select a default 'Editor Assignment Chain' template for each Article Type.

Partial page displayed

**Editor Parameters**

**Editor Assignment Chain Template:**

**Reviewer Parameters:**

Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.

Number of Days Reviewer has to Respond to Invitation:

Automatically Un-assign Reviewers n days after 'Date Review Due':

Automatically Un-assign late Reviewers with partial review saved.

Automatically Promote Alternate Reviewers:

**New and Revised Submissions**

**New and Revised Submissions**

**None**  
**A Brand New EMUG 2015 Editor Chain**  
**Standard Three Editor Chain**  
**Two Editor Chain for Rapid Reports**  
**Three Editor Chain for Invited Submissions**  
**Two Editor Chain for Rapid Communications**

*Set this value to zero to turn off the automatic un-invitation process for all Reviewers who have not responded to an invitation.*

*Set this value to zero to turn off the automatic un-assign process for all Reviewers who have accepted an invitation but not submitted a review on time.*

*Select this box to automatically un-assign late Reviewers even if they have a partial review saved.*

*Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines, is un-invited, or un-assigned.*



# 'Assign Editor Chain' Configuration

## Set Editor Assignment Options

### New Submissions

The settings below control how new manuscripts are assigned to Editors. The first choice, 'Submissions go to *New Submissions Requiring Assignment* folder' allows manual assignment of editors. The sub option "Submissions where Author has Selected an Editor" automatically directs the submission to the Editor selected by the Author at the 'Request Editor' manuscript submission step. The sub option 'Submissions where Author has Selected a Section/Category' automatically directs the submission to the Editor selected by the Author at the 'Select Section/Category' manuscript submission step.

If "Assign to Editors by Rotation" is selected, the submissions are automatically directed to the Editor with the oldest assignment date.

- Submissions go to *New Submissions Requiring Assignment* folder
  - Except:
    - Submissions where Author has selected an Editor  
*Please also configure settings on the 'Set Request or Assign Editor Display Options' page.*
    - Submissions where Author has selected a Section/Category  
*Please also assign Editors to sections of*
  - Assign to Editor by Rotation  
*Please also select Editors on the 'Set Editor Rotation Participan*

### Revised Submissions

The settings below control how revised manuscripts are assigned to Editors. The first choice, 'Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder' allows manual assignment of Editors. If the first editor assignment for the revision will be allowed to assign the entire

If the "Revisions are automatically directed to the First Assigned Editor of the previous version" choice is selected, a Revision will be automatically assigned to the First Assigned Editor of the previous version.

- Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder
  - Allow reassignment to previous Editors
    - Letter:
  - Revisions are automatically directed to the First Assigned Editor of the previous version.

**HINT:** To assign the Editor Chain for revised submissions using a template, select the 'Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder' radio button.

# 'Assign Editor Chain' Configuration

## Reassign Editors

**Manuscript Number:**  
SALLYDEV112-D-14-00056R1

**Title:** Testing the Editor Chain

The Editors listed were assigned to the previous version of this submission in the order indicated. To reassign the previous Editors in the same order, use one of the 'Reassign...' buttons. The submission will be automatically assigned to each editor in succession, and the last assigned Editor of the previous version will then be responsible for the submission.

Use 'Edit this/selected Chain' to first change these assignments; use 'Create a New Chain' for a new Chain as configured for this Article Type; use 'Assign Individual Editor' to set up just the first assignment.

Assignment Order	Editor Name	Editor Role	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
Editor 1	Sally Editor, PhD	Managing Editor	31	0		Yes
Editor 2	Chief Editor	Editor in Chief	9	0		Yes
Editor 3	David Editor	Section Editor	14	0		Yes
Editor 4	Michael Editor	Section Editor	19	0		Yes

Cancel

Reassign with Custom Letter

Reassign with Default Letter

Cancel

Reassign with Custom Letter

Reassign with Default Letter

Edit this Chain

Create a New Chain

Assign Individual Editor

Edit this Chain

Create a New Chain

Assign Individual Editor

# 'Assign Editor Chain' Configuration

### Edit Role Definition

**Role Name:\***   
*Maximum Role name is 40 characters.*

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

---

[Expand All](#)   [Collapse All](#)

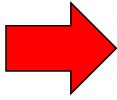
**[-] New Submissions**

- Receive New Submissions in 'New Submissions' Folder
  - Perform Technical Check (submissions)
- Receive New Transferred Submissions in 'New Submissions' Folder
- Submit Manuscript as an Editor
  - Restrict to 'Editor/Publisher Use Only'
  - Can set 'Accept on Submission' Final

**[-] Editor Assignment**

- Receive Assignments in 'New Assignments' Folder
  - Receive Assignments without Invitation
  - Receive Invitations for Assignments
- Always Use Search-based selection for Editor Chain Assignment (i.e. if not Applied Automatically by System)
- Assign Editor
- Redirect to Other Editor (and be removed from Editor Chain)
- Change Corresponding Editor
- Blind Editor
- Unassign Other Editors
- Unassign Myself

The *RoleManager – Editor* 'Always Use Search-based selection for Editor Chain Assignment' permission determines the method used to identify the Editor when assigning the Chain.





# Modifying an Editor Chain

...

Replace or Remove an Editor

# Current Unassign Editor Functionality

- Editors with permission can click the Unassign Editor Action Link to 'Unassign' or 'Switch' the assignment for the *lowest level Editor* in the Chain
- The lowest level Editor must not have saved or submitted an Editorial decision
- If the Editor is removed from the Chain, Reviewers are associated with the next highest Editor in the Chain
- If the assignment is switched to another Editor, reviews are associated with the new Editor
- Editors with 'Unassign Other Editors' and 'Assign Editor' permission can remove or replace the Editor at the *bottom of the Chain*
- Editors with 'Unassign Myself' and 'Assign Editor' permission – who are at the bottom of the Chain – can remove or replace *their own assignment*

# Current Unassign Editor Functionality

If the current Editor Assignment Chain is:



Editor C can be removed from the Chain



or Editor C's assignment can be switched to another Editor.



# Current Unassign Editor Functionality


If there is only one Editor in the Chain, and Reviewers *have not been* invited, the assignment can be rolled back.

**Unassign Editor**

Are you sure you want to unassign the Editor? If you unassign the Editor from this submission, David Editor will no longer be responsible for the submission, and the submission must be assigned to another Editor.

Click 'Switch to New Editor' to immediately assign a new Editor to the submission.

Click 'Roll Back to Previous Editor' to move the submission back up the chain to the Assigning Editor.




If there is only one Editor in the Chain, and Reviewers *have been* invited the assignment can only be switched to another Editor.

**Unassign Editor**

Are you sure you want to unassign the Editor? If you unassign the Editor from this submission, Sally Editor, PhD will no longer be responsible for the submission, and the submission must be assigned to another Editor.

Click 'Switch to New Editor' to immediately assign a new Editor to the submission.



# Current Unassign Editor Functionality

If Reviewers have been invited or assigned:



Editor C's assignment can be switched to another Editor:



Or the assignment can be rolled back:



*But no other Editors can be added to the Chain once the assignment has rolled back if Reviewers have been invited or assigned!*

# What if?

- The Editor Assignment Chain could be *modified* in one action on a single page?
- An Editor with permission could replace or remove an Editor for *any step* in the Editor Assignment Chain – not just the lowest level Editor?
- Editors could be replaced *after* they have submitted a decision?
- An Editor with permission could replace or remove multiple Editors in one action, on a single page?
- An Editor with permission could replace one Editor with another Editor who has a *different* Editor Role?



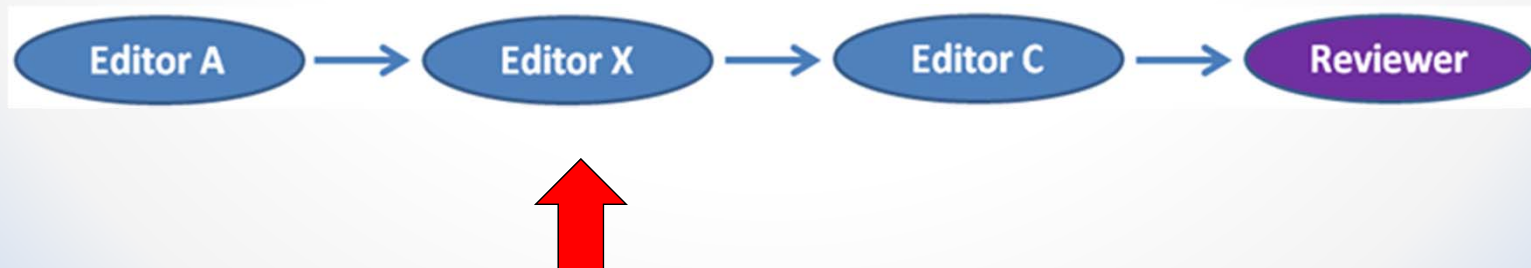
# New 'Modify Editor Chain' Feature



In EM v. 12.2, Editors can replace or remove an Editor from any step in the Editor Assignment Chain:



Modified Editor Assignment Chain:

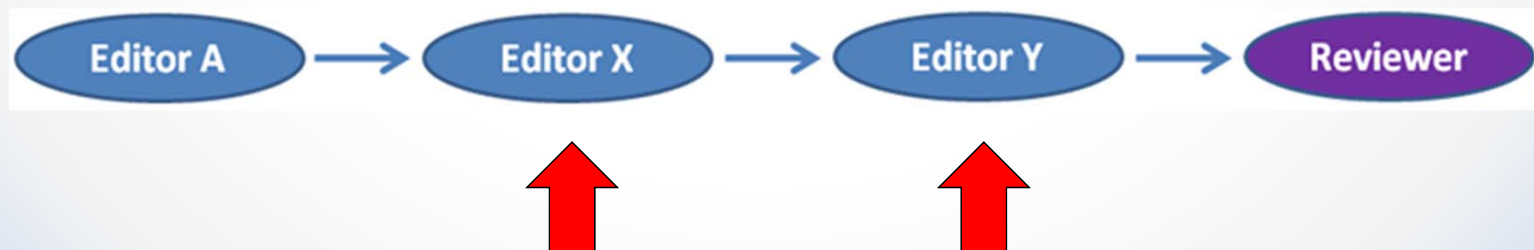


# New 'Modify Editor Chain' Feature

Editors will be able to remove or replace more than one Editor in the Chain in one action on one page!



Modified Editor Assignment Chain:

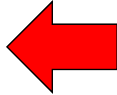


# New 'Modify Editor Chain' Feature

- An Editor who has saved or submitted a decision can be replaced by another Editor with the *same Role*
- Under certain conditions, an Editor may be replaced by another Editor with a *different Role*
- Replacement Editors inherit the history of the Editor they have replaced
- Under certain conditions, an Editor may be removed from the Chain altogether
- Default or customized letters may be sent
- Modifications to the Editor Chain are visible on the Custom *Details* page, the *History* page and in Reports

# New 'Modify Editor Chain' Feature

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Editor with Current Responsibility ▲▼	Review Status	View Decision ▲▼
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (82%)</a> <a href="#">Details ▼</a> <a href="#">History</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Invite Reviewers</a> <a href="#">Solicit Commentary</a> <a href="#">Notify Editor</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	SALLYDEV121-D-15-00008	Original Study		New 'Modify Editor Chain' Feature for EMUG 2015	Buzz Lightyear Aldrin PhD	May 12 2015 5:00PM	May 12 2015 5:01PM	With Editor	Harry Editor		



The Unassign Editor link is displayed for Editors with access to the submission and permission to modify the Chain, up to the point that the Final Disposition is set for the submission. Clicking the link brings the user to the new *Modify Editor Chain* page.

# New 'Modify Editor Chain' Feature

### Modify Editor Chain




[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor  
Assignment Chain

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

#### Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	None Selected
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor	None Selected
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	<a href="#">Editor Search</a>

In this example, the logged-in Editor is either not in the Chain AND has permission to remove / replace other Editors OR is the first Editor in the Chain and has permission to remove or replace her assignment or that of subordinate Editors.

# New 'Modify Editor Chain' Feature

## Modify Editor Chain


[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor Assignment Chain

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

**Current Editor Assignment Chain**

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	This Editor cannot be replaced
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor	This Editor cannot be replaced
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor <input type="text" value="Associate Editor"/>	<a href="#">Editor Search</a>

In this example, Michael Editor is the logged-in Editor, has not saved or submitted a decision and has permission to remove or replace his own Editor assignment.



# New 'Modify Editor Chain' Feature



**Current Editor Assignment Chain**

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	<div style="border: 1px solid black; padding: 2px;">Managing Editor Section Editor Associate Editor Editor in Chief Guest Editor</div>	None Selected <input type="button" value="v"/>
	Editor 2	<a href="#">David Editor</a> Section Editor		None Selected <input type="button" value="v"/>
	Editor 3	<a href="#">Michael Editor</a> Associate Editor		<a href="#">Editor Search</a>

**Current Editor Assignment Chain**

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor <input type="button" value="v"/>	<div style="border: 1px solid black; padding: 2px;">None Selected John David Smith Jane Adams Harriet Truman</div>
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor <input type="button" value="v"/>	
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor <input type="button" value="v"/>	<a href="#">Editor Search</a>



The 'New Editor' column displays non-blinded Editors with the Role selected in the 'Role' column – either in a dropdown list or in the search results.

# New 'Modify Editor Chain' Feature



**Current Editor Assignment Chain**

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	None Selected
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor	None Selected
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	<a href="#">Editor Search</a>

**Current Editor Assignment Chain**

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Section Editor	None Selected
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor	Jackson Browne
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	Don Henley
				Glenn Frey
				David Editor

When the Role selected in the 'Role' column is changed, only non-blinded Editors with the selected Role are displayed in the 'New Editor' dropdown list or search results.

# New 'Modify Editor Chain' Feature

### Modify Editor Chain

[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor Assignment Chain



The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may add an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

#### Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	None Selected
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor	None Selected
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	<a href="#">Editor Search</a>

#### Insert Special Character

(	Criterion	Is/Is not	Selector	Value	)			
<input type="checkbox"/>	Editor Role	is	Equal To	Associate Editor	<input type="checkbox"/>	<input type="checkbox"/>	AND <input type="checkbox"/>	<input type="button" value="Remove"/>
<input type="checkbox"/>	Last Name	is	Begins With		<input type="checkbox"/>			<input type="button" value="Remove"/>



When searching for an Editor, the Role name is preselected on the search page.

# New 'Modify Editor Chain' Feature

**Editor Search**

**Manuscript Number:**  
SALLYDEV112-D-15-00016

**Title:** Testing Editor Assignment Chain

Please select the Editor whom you would like to assign for this step in the Editor Assignment Chain. You will be allowed to send this Editor either the default editor assignment letter or a customized letter.

**Editor 2:** Associate Editor

Click the Blind Editors link to block access to this submission for one or more Editors

(1) Abdomen/Gastrointestinal tract; (2) Adrenal glands

Page: 1 of 1 (5 total People Matched)

Select	Editor Role	Editor Name	Current	Count	Count	Count	Count	Count
<input type="radio"/>	Associate Editor	<a href="#">Bradley Cooper</a>		6	0			Yes
<input type="radio"/>	Associate Editor	<a href="#">Thomas Hanks, PhD</a>		26	1	1		Yes
<input type="radio"/>	Associate Editor	<a href="#">Mary Poppins</a>		14	0			Yes
<input checked="" type="radio"/>	Associate Editor	<a href="#">Dr. Jack Spratt</a>		9	1	2		Yes
<input type="radio"/>	Associate Editor (This Editor is being)	<a href="#">Michael Editor</a>		17	0			Yes

The Editor selected on the search results page is now displayed on the "Modify Editor Chain" page. When a valid change is proposed, the "Confirm Selections ..." buttons are enabled.

**Modify Editor Chain**

[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor Assignment Chain

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

**Current Editor Assignment Chain**

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	None Selected
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor	None Selected
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	<a href="#">Dr Jack Spratt</a> <a href="#">[Search]</a>

[Dr Jack Spratt](#) [\[Search\]](#)

# New 'Modify Editor Chain' Feature

Editors who have submitted a decision cannot be removed – they can only be replaced by another Editor who has the *same* Role.

### Modify Editor Chain

[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor Assignment Chain

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

#### Current Editor Assignment Chain

Step	Assigned Editor	Role	New Editor
Editor 1	<a href="#">Sally Editor</a> Managing Editor <small>(Major Revision)</small>	Managing Editor	This Editor cannot be replaced
Editor 2	<a href="#">David Editor</a> Section Editor <small>(Major Revision)</small>	Section Editor	This Editor cannot be replaced
Editor 3	<a href="#">Michael Editor</a> Associate Editor <small>(Minor Revision)</small>	Associate Editor	This Editor cannot be replaced

In this example, the logged-in user has permission to unassign other Editors, but does not have permission to replace Editors in the Chain. Since all Editors have submitted decisions they cannot be removed.

# New 'Modify Editor Chain' Feature

## Modify Editor Chain

[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor Assignment Chain

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

### Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	No available users have this Role
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor	None Selected
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	<a href="#">Editor Search</a>

### New Editor

No available users have this Role

None Selected

[Editor Search](#)

In this example, Sally Editor is the only user with a “Managing Editor” Role. Text is displayed that reads, “No available users have this Role”.



# New 'Modify Editor Chain' Feature

## Modify Editor Chain


[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor Assignment Chain

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

### Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Guest Editor	John Lennon
	Editor 2	<a href="#">David Editor</a> Section Editor <i>(Major Revision)</i>	Section Editor	None Selected
	Editor 3	<a href="#">Michael Editor</a> Associate Editor <i>(Minor Revision)</i>	Associate Editor	<a href="#">Editor Search</a>

Once Editors have made a decision, their assignment can be switched to another Editor with the *same* Editor Role, but they cannot be removed from the Editor Assignment Chain.

# New 'Modify Editor Chain' Feature


**Modify Editor Chain**

**Manuscript Number:** SALLYDEV120-D-15-00015

**Title:** Testing Editor Assignment Chain

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

**Current Editor Assignment Chain**

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	None Selected

[View Reviews and Comments](#)

**Modify Editor Chain**

**Manuscript Number:** SALLYDEV120-D-15-00015

**Title:** Testing Editor Assignment Chain

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

**Current Editor Assignment Chain**




	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	None Selected

**Buttons:** Cancel, Confirm Selections and Send Default Letters, Confirm Selections and Send Custom Letters

If Reviewers have been invited or assigned, the only Editor in the Chain can be replaced but not removed. Someone has to handle the incoming reviews!

# New 'Modify Editor Chain' Feature

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor <input type="text"/>	John David Smith <input type="text"/>
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor <input type="text"/>	Jackson Browne <input type="text"/>
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor <input type="text"/>	<a href="#">Editor Search</a>



When the proposed changes are valid, the 'Confirm Selections and Send Default Letters' and 'Confirm Selections and Send Custom Letters' buttons are enabled.

# New 'Modify Editor Chain' Feature

## Modify Editor Assignment Chain - Confirm Selection and Customize Letters

The following people are configured to receive a letter when an Editor is unassigned for a submission, and when the submission is switched to a new Editor(s). Note: All new (switched to) Editors must be automatically assigned to the submission, even if the Editor Role is traditionally invited for Editor Assignments.

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 1

#### Editor Being Unassigned

Name	Letter	Do Not Send Letter
<a href="#">Sally Editor (Managing Editor)</a>	Editor Assignment Undone	<input type="checkbox"/>

### Editor 2

#### Editor Being Unassigned

Name	Letter	Do Not Send Letter
<a href="#">David Editor (Section Editor)</a>	Editor Assignment Undone	<input type="checkbox"/>

#### Editor Being Assigned (Switched To)

Name	Letter	Do Not Send Letter
<a href="#">Jackson Browne (Section Editor)</a>	Editor Assignment	<input type="checkbox"/>

### Editor 3

#### Editor Being Unassigned

Name	Letter	Do Not Send Letter
<a href="#">Michael Editor (Associate Editor)</a>	Editor Assignment Undone	<input type="checkbox"/>

#### Others Notified of Editor Unassignment

Name	Letter	Do Not Send Letter
<a href="#">Mary Editor, PhD (Managing Editor)</a>	Editor Notice an Assignment was Undone	<input type="checkbox"/>
<a href="#">Bob Reviewer, MS, PhD (Reviewer)</a>	Reviewer Notification an Editor was Unassigned	<input type="checkbox"/>
<a href="#">Roger Rabbit, PhD (Reviewer)</a>	Reviewer Notification an Editor was Unassigned	<input type="checkbox"/>

Letters can be customized for those recipients whose Role is configured to receive notifications for these events in ActionManager.

# New 'Modify Editor Chain' Feature

## Editor Assignment Confirmation

The following changes have been made for submission SALLYDEV112-D-14-00062:

- Sally Editor has been replaced by John David Smith
- David Editor has been replaced by Jackson Browne
- Michael Editor has been removed from the submission

E-mail has been sent to the following individuals notifying them of the Editor assignment changes:

Sally Editor (Managing Editor)  
John David Smith (Managing Editor)  
David Editor (Section Editor)  
Jackson Browne (Section Editor)  
Michael Editor (Associate Editor)  
Bob Reviewer, MS, PhD (Reviewer)  
Roger Rabbit, PhD (Reviewer)  
Stephen Author (Author)

Close

The *Confirmation* page identifies all changes to the Editor Assignment Chain and lists email recipients.

# New 'Modify Editor Chain' Feature

Editors		<a href="#">Top</a>
<b>Name:</b>	Chief Editor  <span style="background-color: yellow;">[Proxy]</span>	
<b>Role:</b>	Editor in Chief	
<b>Date Assigned:</b>	May 12 2015 5:01PM	
<b>Date Completed:</b>		
<b>Elapsed Days:</b>	0	
<b>Recommendation:</b>		
<hr/>		
<b>Name:</b>	Michael Editor  <span style="background-color: yellow;">[Proxy]</span>	
<b>Role:</b>	Section Editor	
<b>Date Assigned:</b>	May 12 2015 5:01PM	
<b>Date Completed:</b>		
<b>Elapsed Days:</b>	0	
<b>Recommendation:</b>		
<hr/>		
<b>Name:</b>	Harry Editor  <span style="background-color: yellow;">[Proxy]</span>	
<b>Role:</b>	Associate Editor	
<b>Date Assigned:</b>	May 12 2015 5:01PM	
<b>Date Completed:</b>		
<b>Elapsed Days:</b>	0	
<b>Recommendation:</b>		
<hr/>		

Here is the *Details* page before the Chain is modified . . .



# New 'Modify Editor Chain' Feature

Editors	
<b>Name:</b>	John David Smith  [Proxy] (Replaced Sally Editor)
<b>Role:</b>	Managing Editor
<b>Date Assigned:</b>	Sep 29 2014 12:25PM
<b>Date Completed:</b>	
<b>Elapsed Days:</b>	0
<b>Recommendation:</b>	
<hr/>	
<b>Name:</b>	Jackson Browne  [Proxy] (Replaced David Editor who replaced Don Henley)
<b>Role:</b>	Section Editor
<b>Date Assigned:</b>	Sep 29 2014 12:25PM
<b>Date Completed:</b>	
<b>Elapsed Days:</b>	0
<b>Recommendation:</b>	

And here is the *Details* page after the Chain has been modified.

# 'Modify Editor Chain' Configurations

## RoleManager – Editor

**Edit Role Definition**

Role Name:\*   
Maximum Role name is 255 characters

Check the functions that this role is permitted to perform. Note : in boxes select or deselect multiple terms by holding down the CTRL (PC) or Command (Mac) key.

[Expand All](#) [Collapse All](#)

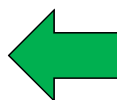
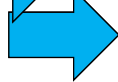
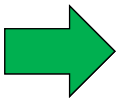
- New Submissions**
- Editor Assignment**
  - Receive Assignments
    - Classic Method of Editor Assignment
      - Receive Assignments without Invitation
      - Receive Invitations for Assignments
  - Always Use Search-based selection for Editor Chain Assignment / Replacement (i.e. if not Applied Automatically by System)
  - Assign Editor Using Single Editor Selection
  - Assign Editor Using Suggested Editor Queue
    - Close Queue and Assign Editor
  - Redirect to Other Editor (and be removed from queue)
  - Change Corresponding Editor

### A Few Options:

- 'Unassign Other Editors' + 'Assign Editor'
- 'Unassign Myself' + 'Unassign Subordinate Editors' + 'Replace Editor'
- 'Unassign Myself' + 'Unassign Subordinate Editors'
- 'Unassign Myself' + 'Replace Editor'

- Blind Editor
- Unassign Other Editors
- Unassign Myself
  - Unassign Subordinate Editors
  - Replace Editor

- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**



# 'Modify Editor Chain' Configurations

## *RoleManager – Editor*

- 'Always Use Search-based selection for Editor Chain Assignment / Replacement (i.e. if not Applied Automatically by System)'
- Editorial Office User
  - 'Assign Editor'
  - 'Unassign Other Editors'
- Editor in the Chain
  - 'Unassign Myself'
    - 'Unassign Subordinate Editors'
    - 'Replace Editor'

# 'Modify Editor Chain' Configurations

## PolicyManager Main Menu

---

[Expand All](#)

[Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊕ **Submission Policies**
- ⊕ **Questionnaire Policies**
- ⊕ **Additional Data Policies**
- ⊖ **Editor Assignment Policies**
  - [Set Editor Assignment Options](#)
  - [Set Editor Rotation Participants](#)
  - [Edit Instructions on the Modify Editor Chain Page](#)
  - [Configure Automated Summary Reminders](#)
- ⊕ **Suggest Editor Policies**
- ⊕ **Reviewer and Editor Form Policies**
- ⊕ **E-mail and Letter Policies**
- ⊕ **General Policies**

Publications can customize the instructional text that is displayed on the 'Modify Editor Chain' page.

# 'Modify Editor Chain' Configurations

## Edit Instructions on the Modify Editor Chain Page

Enter the instructions that you would like to appear when Modify Editor Chain page is displayed.

Page	Instructions
Modify Editor Chain	<p><a href="#">Insert Special Character</a></p> <p>The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.</p> <p><a href="#">View Default Instructions</a> <a href="#">Revert to Default Instructions</a></p>

Cancel

Submit

Publications can enter customized text . . .

# 'Modify Editor Chain' Configurations

**Default Instructions for the Modify Editor Chain Page**

Here are the default instructions that appear when Modify Editor Chain page is displayed.

Close

Page	Instructions
<b>Modify Editor Chain</b>	The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

Close

step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor assignments as needed and send the selected letters.

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

Cancel Submit

... And can view or revert to the default instructions.



# Summary

## Assign Editor Chain (v. 12.1)

- The Editor Assignment Chain can be *created* in one action on a single page
- Publications can create various templates that are then applied to Article Types
- Editor Roles can be pre-selected for each step in the Chain
- Default letters can be associated for each Editor
- Additional Editors can be added when assigning the Chain
- Can be used to assign revisions
- Can only be used when assigning the first Editor in the Chain

## Modify Editor Chain (v. 12.2)

- The Editor Assignment Chain can be *modified* in one action on a single page
- Editors with permission can remove or replace an Editor for any step in the Chain (subject to conditions)
- Editors can be replaced after submitting a decision, until the Final Disposition is set
- Editors can be replaced by another Editor with a different Role (subject to conditions)



Questions?