

# Welcome to EMUG 2015



# Let's Discuss

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# Agenda

- Discussion Forums
  - The Basics
  - Sample Use Cases
  - Initiating a Discussion
  - Viewing/Participating in Discussion
  - Managing a Discussion
  - Brief Case Study: PLOS Use of Discussions
  - Administration (Permissions, Letters, Topic Template Configuration, Automatic Initiation)



# The Basics



- Tool for conducting a “side-bar” conversation
- Initiate at any point in workflow – no restrictions
- Solicit opinions or feedback from Editors outside the decision chain
- Can even be done before any Editors are assigned:
  - Initial consult
  - Second opinion
  - Better suited for another publication
  - Outright reject

# The Basics



- Multiple “threads” for a single submission
  - Different Topics
  - Different Participants
- Pre-configured Topic Templates
  - Pre-populate default Initial Comments
  - Set up default settings for different Topics

# Sample Use Cases

- General questions about a new submission
  - Ethical concerns
  - Conflict of interest
  - Incorrect classification (e.g. submitted as Clinical Trial but is it really a Research Article)
  - Who is the best Editor to handle this paper?

# Sample Use Cases

- Editors consulting with each other
  - Do we need more peer review?
  - Major revisions were made, does the new data table match the mission statement?
  - Decision was rescinded for these reasons...please invite more Reviewers to review the revised manuscript
  - Contemplate appeals
- Offer comment on Draft Decision Letter
  - Should any comments be removed
  - Should any additional information be provided

# Starting a Discussion

**New Submissions - Mary François Smith, PhD**

**Contents:** These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort order.

Page: 1 of 1 (6 total submissions) Display 100

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	I S ▲
<a href="#">View Submission</a> <a href="#">Details ▼</a> <a href="#">Initiate Discussion</a> ←						
<a href="#">History</a> <a href="#">Technical Check</a> <a href="#">View Reference Checking Results</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="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Google Scholar Title Search</a> <a href="#">Author ORCID profile</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>		Letter to the Editor		Demonstration of Discussions	<a href="#">Sally Editor ▼</a>	O
<a href="#">View Submission</a>						



# Top of Initiate Discussion Page

**Initiate Discussion for Manuscript Number: DEMO483  
Brad Pitt  
"A Very Important Research Article"**

Choose Topic Template:

- Please Choose
- Default Topic Template
- Second Opinion - Outright Reject?
- Need More Reviewers
- Comment on Draft Decision Letter
- Graphic Specialist - Check Figures

**Topic**

**Initial Comments**



# Bottom of Initiate Discussion Page

Page: 1 of 9 (81 total candidates) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) >> >| Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	View Reviews and Comments	Download Files(source and companion)	View Draft Decision Letter	# Classification Matches	Classification Matches	Available during next 300 days
<input type="checkbox"/>	Wendys Test Editor	<a href="#">Candy Cane</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	UptoDate Report Editor	<a href="#">John Garçon, MD</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Typesetter - old	<a href="#">George Allen</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Typesetter	<a href="#">Nicki Cat</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Typesetter	<a href="#">John Smith</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Test Editor	<a href="#">Jane Smith</a>	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Test Editor	<a href="#">Paul Hewson</a>	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Staff Editor	<a href="#">Arthur Author</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Review Article Editor	<a href="#">clevelandeditor</a> <a href="#">clevelandeditor</a>	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Reprint Vendor	<a href="#">Joe Yew</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes

Page: 1 of 9 (81 total candidates) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) >> >| Display 10 results per page.

# Customize Letter to Participants

## Preview Letter - Discussion Forum Invitation

To permanently save this letter, close this window and click 'Save' on the Customize Letter page.

Close

Dear Editor,

I invite you to participate in a discussion for a specialized paper where we need a second opinion.

The topic is:  
Please start a discussion about the discussion topic.

The forum can be reached at:

%DISCUSSION\_DEEP\_LINK%

Thank you,

The Editorial Staff for the initiating editor

Close

# Participant Access to Discussion

- Participants can access a Discussion in two ways
  - Via a Deep Link in a letter

From: em.demobh110.0.3b4333.cbe28493@editorialmanager.com on behalf of Betsy 11.0 <no-reply@editorialmanager.com> Sent: Wed 5/21/2014 11:57 AM

To: Betsy Hopkins

Cc:

Subject: Invitation to a Discussion Forum - [EMID:fb011324a46b663e]

Dear Editor,

I invite you to participate in a discussion for a specialized paper where we need a second opinion.

The topic is:  
Please start a discussion about the dicussion topic.

The forum can be reached at:

<http://demobh110.edmgr.com/l.asp?i=3356&l=3OEQEIOH>

Thank you,

The Editorial Staff for the initiating editor

# Participant Access to Discussion

- Participants can access a Discussion in two ways
  - Via the “Submissions with Active Discussions” folder on the Editorial Main Menu

The screenshot displays the 'Staff Editor Main Menu' interface. On the left, the text 'Staff Editor Main Menu' is visible. The main content area is divided into two sections: 'Search' and 'Editor 'To-Do' List'. The 'Search' section contains two links: 'Search Submissions' and 'Search People'. The 'Editor 'To-Do' List' section contains a list of items with counts in parentheses: 'My Pending Assignments (2)', 'New Assignments (0)', 'Submissions with Required Reviews Complete (0)', 'Submissions Requiring Additional Reviewers (0)', 'Submissions with One or More Late Reviews (0)', 'Submissions with Active Discussions (2)', 'Reviews in Progress (0)', 'Reviewers Invited - No Response (0)', and 'Submissions Under Review (0)'. The item 'Submissions with Active Discussions (2)' is highlighted with a yellow rectangular box.

# Submissions with Active Discussions Folder

- Multiple topics indicated in Submissions with Active Discussions folder
- Users see only threads with which they are associated

Submissions with Active Discussions

Page: 1 of 1 (11 total submissions) Display  results per page.

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Article Title ▲▼	Corresponding Author ▲▼	Topic	Date of Last Post	Date Discussion Started	Discussion Initiator	Editorial Status ▲▼	Current Editorial Status ▲▼
<a href="#">Discussions</a> <a href="#">View Submission Details</a> <a href="#">Send E-mail</a>	STACEYDEV111-D-14-00001	Clinical	Lyme Disease in Adolescents	Stacey Lavelle \$ @	Initial Consultation	Jun 04, 2015	May 12, 2014	José Ignacio Ed García-Plazaola, M.D. ▼	May 09, 2014	Editor Invited
					Suggest Reviewers	May 12, 2014	May 12, 2014	José Ignacio Ed García-Plazaola, M.D. ▼		
<a href="#">Discussions</a> <a href="#">View Submission Details</a> <a href="#">Send E-mail</a>	STACEYDEV100-D-12-00009	Ethics	Testing the Editor Decline Reasons October 2012	Jiminy Cricket ▼	Initial Consult	May 16, 2013	May 16, 2013	José Ignacio Ed García-Plazaola, M.D. ▼	Oct 04, 2012	Editor Invited

# Participant View

## Discussion for Manuscript Number: Sally Editor "Demonstration of Discussions"

Close

These are the custom instructions for the Discussion Forum.

[View Submission](#)

[Details](#)

**Topic: Second Discussion Topic**

**Comments:**

1. Enter your comments in  
this space

Post

2. Click Post

Close

Discussion Thread Showing  
All the Comments

Participant ▲ ▼	Comments	Date ▲ ▼
Mary François Smith, PhD	Please start a discussion about the dicussion topic.	Dec 09 2013 04:46PM

# Participant View

## Discussion for Manuscript Number: Sally Editor "Demonstration of Discussions"

Close

These are the custom instructions for the Discussion Forum.

[View Submission](#)

[Details](#)

Topic: Second Discussion Topic

Comments:

View/Print All

3. A new entry is created in the Discussion Thread.

Post

Participant ▲▼	Comments	Date ▲▼
Candy Cane	My Comment has been entered here.	Dec 10 2013 01:23PM
Mary François Smith, PhD	Please start a discussion about the dicussion topic.	Dec 09 2013 04:46PM

Close



# Initiator (Manage) View

**Discussion for Manuscript Number:  
Sally Editor  
"Demonstration of Discussions"**

End the Discussion

These are the custom instructions for the Discussion Forum.

[Participant Summary](#)
[View Submission](#)
[File Inventory](#)
[Add/Edit Submission Flags](#)
[Details](#)

**Topic:**  
Second Discussion Topic

**Comments:**

Participant	Comments	Date
Candy Cane	My Comment has been entered here.	Dec 10 2013 01:23PM
Mary François Smith, PhD	Please start a discussion about the dicussion topic.	Dec 09 2013 04:46PM

Invite More Participants

Participant	Post	View Reviews and Comments	Download Files	View Draft Decision Letter	
George Allen	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
Candy Cane	1 Dec 10 2013 01:23PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
Nicki Cat	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
John Smith	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
Mary François Smith, PhD	1 Dec 09 2013 04:46PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Send E-mail</a>

# Discussion Fields in Search Submissions

Remove Search Definition   Edit Selected Search Definition   Run Selected Search Definition

[Help with Searching](#)   [Insert Special Character](#)   [Value Options](#)   [Advanced Criteria](#)

(	Criterion	Is/Is not
▼	Manuscript Number	is ▼
	Classification Description	
	Production Notes	
	Editorial Status	
	Editorial Status Date	
	Initial Date Submitted	
	Final Decision Date	
	First Author First Name	
	First Author Last Name	
	Any Author First Name	
	Any Author Last Name	
	Reviewer First Name	
	Reviewer Last Name	
	Handling Editor First Name	
	Handling Editor Last Name	
	Assigned Editor First Name	
	Assigned Editor Last Name	
	Final Disposition Term	
	Submission Flag Name	
	Discussion Topic	
	Discussion Comments	
	Date Discussion Topic Initiated	
	Discussion Topic Initiator First Name	
	Discussion Topic Initiator Last Name	
	Last Discussion Topic Post Date	
	Discussion Topic Posted By First Name	
	Discussion Topic Posted By Last Name	
	Discussion Status	
	Discussion Participant First Name	
	Discussion Participant Last Name	
	Production Status Term	

view standard entry is mm/dd

t of criteria in criteria, the qui lations, use t ne AND and C taining per Group, dates, and Group Names may s. You may enter any mixed case value. (value) fields by selecting the "Unspecified" Selector.

[Editorial Menu](#)  
[Production Tasks Menu](#)  
[Production Status Grid](#)

Computer | Protected Mode: Off   100%

# First-Hand User Experience

- Helen Atkins, Acting Publisher at PLOS
- Discussion features we like at PLOS:
  - Communicate with many different parties associated with the MS, both internal and external
  - Choose who participates in each discussion
  - Open many discussions per MS
  - Create standard topics, which can vary for each journal



# Editor RoleManager Permissions

- Any Editor can be invited to participate in a Discussion
- Further permissions allow Editor Roles to:
  - View All Discussions – regardless of participation
  - Initiate and Manage “their own” Discussions
  - Initiate and Manage ALL Discussions
    - Users who have “carte blanche” access to all discussions started by self or others.

## Discussion Forums

- View All Discussions
- Initiate and Manage Discussions
  - My Discussions Only
  - All Discussions

# Letters

- Letters in the “Discussion Forum” letter family are used in three ways:
  - Invitations to Participate
  - Notifications of Posts
  - Discussion-related “Ad Hoc” letters
- Notifications of Posts can either go to:
  - Discussion Initiator Only
  - All Active Participants
- Can be configured to not send letters if you choose
- Three merge fields
  - %INITIAL\_DISCUSSION\_POST%
  - %DISCUSSION\_POST%
  - %DISCUSSION\_DEEP\_LINK%

# Topic Templates

- Use Topic Templates for:
  - High submission volumes
  - Routine discussions for a particular purpose(s) at consistent points in the workflow
- Save Editors time when initiating a discussion
- Use to control/restrict what Editors type in the Initial Comments box
- Using Topic Templates is Optional
  - All publications have one Topic Template – Discussions can be based on this one Template if desired

# Topic Templates

## Add Discussion Topic Template

Below you may enter the text that will be pre-populated on the Initiate Discussion page when users select this template. ([more...](#))

<b>Discussion Topic Template Name</b>	<input type="text" value="Second Opinion - Outright Reject"/> <a href="#">Insert Special Character</a>
<b>'Initiate Discussion' Page Custom Instructions</b>	<input type="text"/>
<b>Topic</b>	<input type="text" value="Second Opinion"/> <input checked="" type="checkbox"/> Allow user to modify Topic name when initiating a discussion
<b>Initial Comments</b>	<p>Please let us know within 2 business days if you think this paper meets the stringent criteria for our publication. If yes, please suggest the best Editor to handle this new subject mater. If not, is it better suited for one of our sister publications? If so, please name the publication for which this paper would be better suited.</p> <input type="text"/> <input checked="" type="checkbox"/> Allow user to modify Initial Comments when initiating a discussion
<b>Default Participant Permissions</b>	<input checked="" type="checkbox"/> View Reviews and Comments <input type="checkbox"/> Download Files (source and companion) <input type="checkbox"/> View Draft Decision Letter
<b>Access to 'Details' Link</b>	<input type="checkbox"/> Display 'Details' link in Submissions with Active Discussions folder and on Discussion page. <p>Select the Details Page Layout that participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts.'</p> <input type="text" value="Editorial Details Layout Configured for the Editor's Role"/> <input type="button" value="v"/>
<b>Discussion Letters</b>	<p>Select the Letter to send asking Editors to participate:</p> <input type="text" value="None"/> <input type="button" value="v"/> <p>Select the notification letter to send when comments are posted:</p> <input type="text" value="None"/> <input type="button" value="v"/> <input checked="" type="radio"/> Notify discussion initiator only <input type="radio"/> Notify all active participants

**Hide** When you **Hide** a Discussion Topic Template, it will no longer be available for selection on the Initiate Discussion page.

- PolicyManager
  - Discussion Forums
    - Configure Discussion Topic Templates



# Automatic Initiation

- Discussions may be automatically launched for specified Article Types when Editor is invited and agrees to handle paper

**Configure Automatic Discussion Initiation**

In the grid below, for each Article Type, please specify whether to initiate a discussion automatically for an ActionManager event by selecting the checkbox 'Initiate Discussion Automatically'. Then select one or more Editor Roles and a discussion Topic Template. A discussion is initiated only if a user with one of these Editor Roles triggers that ActionManager event, and the Editor who invited this Editor has permission to initiate and manage discussions. When a discussion is initiated, it is based on the selected Topic Template.

Article Type	ActionManager Event	Editor Agree to Assignment
Clinical	<input type="checkbox"/> Initiate Discussion Automatically Editor Roles: <span style="float: right;"><a href="#">Select All</a> <a href="#">Clear All</a></span> <div style="border: 1px solid gray; padding: 2px;">             Associate Editor              Deputy Editor              Editorial Assistant              Editor-in-Chief           </div> Topic Template: <div style="border: 1px solid gray; padding: 2px;">Please Choose a Topic Template</div>	
Research	<input type="checkbox"/> Initiate Discussion Automatically Editor Roles: <span style="float: right;"><a href="#">Select All</a> <a href="#">Clear All</a></span> <div style="border: 1px solid gray; padding: 2px;">             Associate Editor              Deputy Editor              Editorial Assistant              Editor-in-Chief           </div>	



# Reviewer Consultation Discussions

...

A New Type of Discussion

# Agenda

- Reviewer Consultation Discussion
  - What is it?
  - Reviewer/Editor Views
  - Automated
  - Participant Status
  - Merge Fields & Letters
  - Configuration
  - Possible Future Enhancements



# Why a New Discussion Type?

- Currently, only Editors can participate in discussions
- However, some publications, especially those using *Open Peer Review* workflows, would like Reviewers to be able to participate
  - The new type allows Reviewers and Editors to discuss a submission openly
  - New type is independent of EM's *Open Peer Review* functionality, but can be used together with it

# New Reviewer Consultation Type

- *Reviewer Consultation* – the new discussion type
  - All Reviewers who have completed a review for a submission can participate in a discussion for it, along with the Editors assigned to the submission
- *Editor Consultation* – all pre-existing discussions are now of this type
  - Only Editors can participate

# Reviewer Consultation – as seen by Reviewer

**Discussion for Manuscript Number: JANETDEV120-D-15-00003**  
**Maney M. Alexander, PhD**  
**"The Roses are Red Theory"**

[Close](#)

Hi Reviewer! Please participate in the discussion for this submission. (This text is customizable.)

[View Submission](#)   [View Reviewer Comments](#)

**Topic: Editors & Reviewers Forum**

[View/Print All](#)

**Comments:**

Enter new comment here  
and click Post button

[Post](#)



Participant ▲ ▼	Comments	Date ▲ ▼
Twink E. Jonesey, PhD	I will be on sabbatical for 4 months starting Feb 2, 2015	Dec 12 2014 04:45PM
Ginger Rabelais <i>(Reviewer 2)</i>	I agree with Jorge	Dec 03 2014 11:05AM
Jorge M. Garcia, PhD <i>(Reviewer 1)</i>	This a formidable task	Dec 03 2014 11:05AM
Frank McDougall	This Corresponding Author for this submission is going on a research trip to Antarctica starting April 2015 and may be unavailable for periods of time ( <a href="#">more...</a> )	Dec 03 2014 11:04AM
Twink E. Jonesey, PhD	This one is on a short timetable.	Dec 01 2014 03:03PM

# Reviewer Consultation – as seen by Editor

**Discussion for Manuscript Number: JANETDEV120-D-15-00003**  
**Maney M. Alexander, PhD**  
**"The Roses are Red Theory"**

Close

Hi Editor! Please participate in the discussion for this submission. (This text is customizable.)

[View Submission](#)

[Add/Edit Submission Flags](#)

[Details](#)

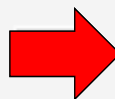
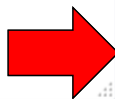


**Topic: Editors & Reviewers Forum**

**Comments:**

View/Print All

Participant	Comments	Date
Twink E. Jonesey, PhD	I will be on sabbatical for 4 months starting Feb 2, 2015	Dec 12 2014 04:45PM
Ginger Rabelais (Reviewer 2)	I agree with Jorge	Dec 04 2014 12:55PM
Jorge M. Garcia, PhD (Reviewer 1)	This a formidable task	Dec 03 2014 11:05AM
Frank McDougall	This Corresponding Author for this submission is going on a research trip to Antarctica starting April 2015 and may be unavailable for periods of time (more...)	Dec 03 2014 11:04AM
Twink E. Jonesey, PhD	This one is on a short timetable.	Dec 01 2014 03:03PM



Editor Participant has 'View All Discussions' permission but not 'Manage' permission

- New Reviewer Participants grid

**Discussion for Manuscript Number: JANETDEV100-D-15-00005R2**  
**Zelda Frye McDougall, PhD**  
**"Antarctic Caverns"**

[Close](#)

Reminding you to please participate in the discussion for this submission. (I am customizable.)

[Participant Summary](#)  
 [View Submission](#)  
 [Add/Edit Submission Flags](#)  
 [Details](#)

**Topic: Reviewers du Jour**

**Comments:**

[Post](#)

Participant	Comments	Date
Mary Jones, PhD	Hey, I am Mary Jones and I'm testing what happens when a discussion is <a href="#">(more...)</a>	Jan 13 2015 12:54PM
Ginger Rabelais (Reviewer 1)	Take it to the mountain.	Jan 12 2015 03:39PM
Twink E. Jonesey, PhD	Hey, I'm an EIC.	Jan 06 2015 03:37PM
Edward M. Browdy	Take the A-Train	Jan 05 2015 02:36PM
Mary Jones, PhD	Let's roll!	Jan 04 2015 01:35PM

[View/Print All](#)

**Editor Participants**

Editor Participant	Role	# Posts	Latest Post	Participant Status	View Reviews and Comments	Download Files	View Draft Decision Letter
Mary Jones, PhD	Managing Editor	1	Jan 13 2015 12:54PM	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Twink E. Jonesey, PhD	Editor-in-Chief	1	Jan 06 2015 03:37PM	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edward M. Browdy	Associate Editor	2	Jan 05 2015 02:36PM	Inactive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Reviewer Participants**

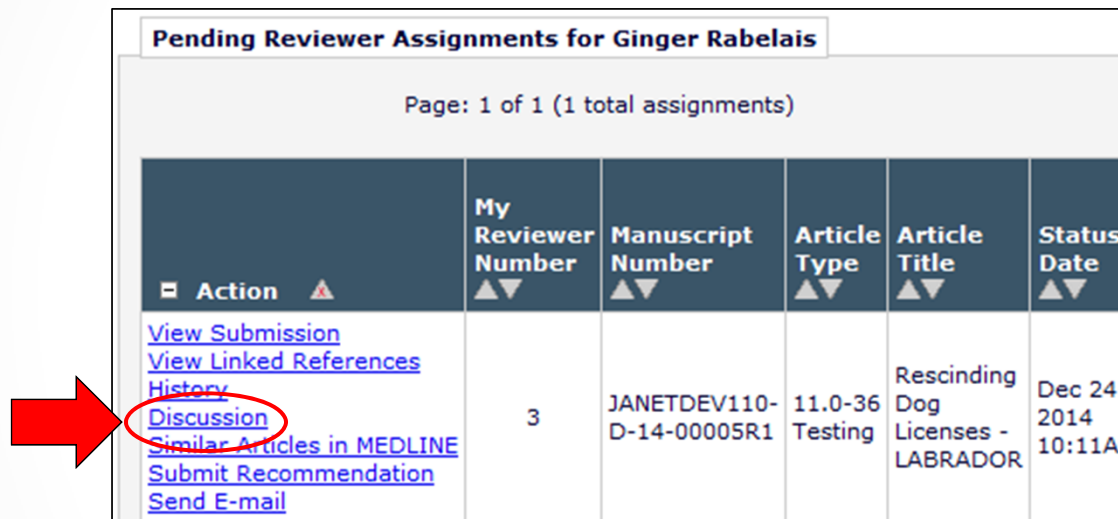
Reviewer Participant	Role	# Posts	Latest Post	Participant Status	Reviewer Number	Complete Review Submitted for Versions	Status of Most Recent Review Assignment
Ginger Rabelais	Reviewer	1	Jan 12 2015 03:39PM	Active	Reviewer 1	R0, R1, R2	R2: Review Complete
Ron Raptor	Reviewer	0		Active	Reviewer 2	R0	R1: Declined
Vanessa Wright	Reviewer	0		Active	Reviewer 4	R1	R2: Partial Review Saved
George Bortnichak	Statistical Reviewer	0		Inactive	Reviewer 5		R2: Reviewer Invited
Melissa Humphrey	Analytical Reviewer	0		Inactive	Reviewer 3		R0: Terminated After Agreeing to Review

[Close](#)



# Reviewer – Access to Discussion

- Reviewer can access discussion from:
  - ‘Discussion’ Action link in Reviewer folders



**Pending Reviewer Assignments for Ginger Rabelais**

Page: 1 of 1 (1 total assignments)

Action	My Reviewer Number	Manuscript Number	Article Type	Article Title	Status Date
<a href="#">View Submission</a> <a href="#">View Linked References</a> <a href="#">History</a> <a href="#">Discussion</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Submit Recommendation</a> <a href="#">Send E-mail</a>	3	JANETDEV110-D-14-00005R1	11.0-36 Testing	Rescinding Dog Licenses - LABRADOR	Dec 24 2014 10:11AM

- Deep link in letter sent when Reviewer submits a complete review (ActionManager event ‘Review Assignment Completed’)
- Deep link in discussion notification letters, e.g. when comment is posted

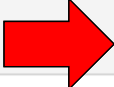
# Reviewer – Access to Submission

- Reviewer has same level of access to a submission from the discussion as from their Reviewer folders

**Discussion for Manuscript Number: JANETDEV120-D-15-00003**  
**Maney M. Alexander, PhD**  
**"The Roses are Red Theory"**

[Close](#)

Hi Reviewer! Please participate in the discussion for this submission. (This text is customizable.)

 [View Submission](#)   [View Reviewer Comments](#)

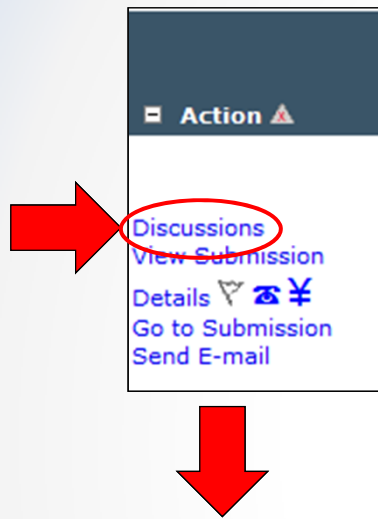
**Topic: Editors & Reviewers Forum** [View/Print All](#)

**Comments:**

Participant ▲ ▼	Comments	Date ▲ ▼
Twink E. Jonesey, PhD	I will be on sabbatical for 4 months starting Feb 2, 2015	Dec 12 2014 04:45PM
Ginger Rabelais <i>(Reviewer 2)</i>	I agree with Jorge	Dec 03 2014 11:05AM
Jorge M. Garcia, PhD <i>(Reviewer 1)</i>	This a formidable task	Dec 03 2014 11:05AM
Frank McDougall	This Corresponding Author for this submission is going on a research trip to Antarctica starting April 2015 and may be unavailable for periods of time <a href="#">(more...)</a>	Dec 03 2014 11:04AM
Twink E. Jonesey, PhD	This one is on a short timetable.	Dec 01 2014 03:03PM

[Post](#)

# Differences Between Discussion Types



- Editor Consultation:
  - Multiple allowed per submission
  - Can be initiated automatically or manually
- Reviewer Consultation:
  - Only one per submission
  - Can only be initiated automatically

**Discussions for Manuscript Number: JMMA-D-15-00033**  
**Maney M. Alexander, PhD**  
**"Quasars and Pulsars"**

Action	Topic ▲▼	Type ▲▼	Last Post Date ▲▼	Posted By ▲▼	Discussion Status ▲▼	Date initiated ▲▼	Initiated By ▲▼	Initial Participant
<a href="#">View</a>	The A Team	Editor Consultation	May 02 2015 03:01PM	Mary Jones, PhD	Open	Apr 12 2015 04:44PM	Mary Jones, PhD	Twink E. Jonesey, PhD
<a href="#">View</a>	Editors & Reviewer Forum	Reviewer Consultation	May 03 2015 01:45PM	Twink E. Jonesey, PhD	Open	Apr 13 2015 04:13PM	Mary Jones, PhD	
<a href="#">View</a>	The B Team	Editor Consultation	May 04 2015 12:01PM	Mary Jones, PhD	Open	May 01 2015 10:59PM	Mary Jones, PhD	Twink E. Jonesey, PhD

Editor Participant (who can 'View All Discussions' but not 'Manage' this one)

**Discussion for Manuscript Number: JANETDEV100-D-15-00005R2**  
**Zelda Frye McDougall, PhD**  
**"Antarctic Caverns"**

[Close](#)

Reminding you to please participate in the discussion for this submission. (I am customizable.)

[Participant Summary](#)  
 [View Submission](#)  
 [Add/Edit Submission Flags](#)  
 [Details](#)

**Topic: Reviewers du Jour**

**Comments:**

[Post](#)

Participant	Comments	Date
Mary Jones, PhD	Hey, I am Mary Jones and I'm testing what happens when a discussion is <a href="#">(more...)</a>	Jan 13 2015 12:54PM
Ginger Rabelais <small>(Reviewer 1)</small>	Take it to the mountain.	Jan 12 2015 03:39PM
Twink E. Jonesey, PhD	Hey, I'm an EIC.	Jan 06 2015 03:37PM
Edward M. Browdy	Take the A-Train	Jan 05 2015 02:36PM
Mary Jones, PhD	Let's roll!	Jan 04 2015 01:35PM

[View/Print All](#)

**Editor Participants**

Editor Participant	Role	# Posts	Latest Post	Participant Status	View Reviews and Comments	Download Files	View Draft Decision Letter
Mary Jones, PhD	Managing Editor	1	Jan 13 2015 12:54PM	Active	✓	✓	✓
Twink E. Jonesey, PhD	Editor-in-Chief	1	Jan 06 2015 03:37PM	Active	✓	✓	✓
Edward M. Browdy	Associate Editor	2	Jan 05 2015 02:36PM	Inactive	✓		

**Reviewer Participants**

Reviewer Participant	Role	# Posts	Latest Post	Participant Status	Reviewer Number	Complete Review Submitted for Versions	Status of Most Recent Review Assignment
Ginger Rabelais	Reviewer	1	Jan 12 2015 03:39PM	Active	Reviewer 1	R0, R1, R2	R2: Review Complete
Ron Raptor	Reviewer	0		Active	Reviewer 2	R0	R1: Declined
Vanessa Wright	Reviewer	0		Active	Reviewer 4	R1	R2: Partial Review Saved
George Bortnichak	Statistical Reviewer	0		Inactive	Reviewer 5		R2: Reviewer Invited
Melissa Humphrey	Analytical Reviewer	0		Inactive	Reviewer 3		R0: Terminated After Agreeing to Review

# Editor Consultation – Features Unchanged

- Multiple 'Editor Consultation' discussions can be open at the same time for a submission
- Discussion initiators can manage these as usual:
  - Initiate a discussion manually
  - Add Editors as participants
  - Close and re-open discussions
- All participants can post comments







# Reviewer Consultation - Automated



- Most of the management is done automatically!
  - Discussion is initiated (behind the scenes) when first Editor for a new submission is confirmed
    - When Editor is either assigned or agrees to handle submission
  - All Editors subsequently assigned to the submission are added automatically
  - All Reviewers assigned or who agree to submit a review are added automatically (as inactive)
  - Automatically concluded when Final Disposition is set (remains open throughout all revisions)





# New Concept - *Inactive* /Active Participants

- All Reviewers assigned or who agree to submit a review are added as 'inactive' participants
- An inactive Reviewer has no access to the discussion yet, but Editors can see that the Reviewer has an open review assignment for the submission

Reviewer Participant	Role	# Posts	Latest Post	Participant Status	Reviewer Number	Complete Review Submitted for Versions	Status of Most Recent Review Assignment	
Jack Bauer 	Reviewer	1	Jan 06 2015 06:32PM	Active	Reviewer 1	R0	R0: Review Complete	<a href="#">Send E-mail</a>
Ginger Rabelais 	Reviewer	1	Jan 06 2015 03:02PM	Active	Reviewer 3	R0	R1: Agreed to Review	<a href="#">Send E-mail</a>
Ron Raptor 	NB Reviewer	0		Active	Reviewer 2	R0, R1	R1: Review Complete	<a href="#">Send E-mail</a>
George Bertichak 	Statistical Reviewer	0		Inactive			R0: Terminated After Accepting to Review	
Sylvia W. Verdi	Reviewer	0		Inactive			R1: Agreed to Review	

# New Concept - Inactive /Active Participants

- When a Reviewer submits a complete review, the Reviewer becomes an 'active' participant and can access the discussion
  - Reviewers cannot be added manually

Reviewer Participant	Role	# Posts	Latest Post	Participant Status	Reviewer Number	Complete Review Submitted for Versions	Status of Most Recent Review Assignment	
Jack Bauer 	Reviewer	1	Jan 06 2015 06:32PM	Active	Reviewer 1	R0	R0: Review Complete	<a href="#">Send E-mail</a>
Ginger Rabelais 	Reviewer	1	Jan 06 2015 03:02PM	Active	Reviewer 3	R0	R1: Agreed to Review	<a href="#">Send E-mail</a>
Ron Raptor 	NB Reviewer	0		Active	Reviewer 2	R0, R1	R1: Review Complete	<a href="#">Send E-mail</a>
George Bortnichak 	Statistical Reviewer	0		Inactive			R0: Terminated After Agreeing to Review	
Sylvia W. Verdi	Reviewer	0		Inactive			R1: Agreed to Review	



# Reviewer Participant Status

- Row 1 – Jack *active* – submitted R0 review
- Row 2 – Ginger *active* – submitted R0 review
- Row 3 – Ron *active* – submitted R0 review, remained *active* while reviewing R1
- Row 4 – George *inactive* – no reviews submitted
- Row 5 – Sylvia *inactive* – if submits R1 review, will become *active*

Reviewer Participant	Role	# Posts	Latest Post	Participant Status	Reviewer Number	Complete Review Submitted for Versions	Status of Most Recent Review Assignment	
Jack Bauer 🙌	Reviewer	1	Jan 06 2015 06:32PM	Active	Reviewer 1	R0	R0: Review Complete	<a href="#">Send E-mail</a>
Ginger Rabelais 🙌	Reviewer	1	Jan 06 2015 03:02PM	Active	Reviewer 3	R0	R1: Agreed to Review	<a href="#">Send E-mail</a>
Ron Raptor @	NB Reviewer	0		Active	Reviewer 2	R0, R1	R1: Review Complete	<a href="#">Send E-mail</a>
George Bortnichak 🙌	Statistical Reviewer	0		Inactive			R0: Terminated After Agreeing to Review	
Sylvia W. Verdi	Reviewer	0		Inactive			R1: Agreed to Review	

# Reviewer Participants Grid

- Summarizes Reviewer information related to the submission (as well as the discussion)
  - Participant Status
  - Reviewer Number
  - Complete Review Submitted for Versions
  - Status of Most Recent Review Assignment

Reviewer Participants								
Reviewer Participant ▲▼	Role ▲▼	# Posts	Latest Post	Participant Status ▲▼	Reviewer Number ▲▼	Complete Review Submitted for Versions ▲▼	Status of Most Recent Review Assignment ▲▼	
Jack Bauer 👑	Reviewer	1	Jan 06 2015 06:32PM	Active	Reviewer 1	R0	R0: Review Complete	<a href="#">Send E-mail</a>
Ginger Rabelais 🧢	Reviewer	1	Jan 06 2015 03:02PM	Active	Reviewer 3	R0	R1: Agreed to Review	<a href="#">Send E-mail</a>
Ron Raptor @	NB Reviewer	0		Active	Reviewer 2	R0, R1	R1: Review Complete	<a href="#">Send E-mail</a>
George Bortnichak 🧢	Statistical Reviewer	0		Inactive			R0: Terminated After Agreeing to Review	
Sylvia W. Verdi	Reviewer	0		Inactive			R1: Agreed to Review	

# Lifetime Participation

- Once Editors/Reviewers become active participants, they remain active participants for the lifetime of the submission
- If a submission is closed and re-opened, new Reviewers can be added to the discussion manually to catch back up to the same state as if the discussion had not been closed

# Expandable/Collapsible Participant Grids

**Discussion for Manuscript Number: JANETDEV120-D-15-00003R1**  
**Maney M. Alexander, PhD**  
**"Ultraviolet Photons"**

Reminding you to please participate in the discussion for this submission. (I am customizable.)

[Participant Summary](#)   [View Submission](#)   [View Reviews and Comments](#)   [File Inventory](#)   [Add/Edit Submission Flags](#)  
[Details](#)   


**Topic:**  
Editors & Reviewers Confab

**Comments:**



Participant 	Comments	Date 
Twink E. Jonesey, PhD	That's an excellent suggestion. Who can we get to implement this?	Jan 07 2015 10:49AM
Jack Bauer <i>(Reviewer 1)</i>	I agree with Ginger	Jan 06 2015 06:32PM
Ginger Rabelais <i>(Reviewer 3)</i>	As a frequent reviewer of this kind of article, I recommend...	Jan 06 2015 03:02PM
Twink E. Jonesey, PhD	Big Dog here, perhaps one of the Reviewers has a good idea about this.	Jan 05 2015 01:22PM
Mary Jones, PhD	Okay, what do you think of the current issue, Twinky? AKA Big Dog?	Jan 05 2015 01:02PM

Editor Participant who can Manage a discussion

**Discussion for Manuscript Number: JANETDEV120-D-15-00003R1**  
**Maney M. Alexander, PhD**  
**"Ultraviolet Photons"**




Reminding you to please participate in the discussion for this submission. (I am customizable.)

[Participant Summary](#)
[View Submission](#)
[View Reviews and Comments](#)
[File Inventory](#)
[Add/Edit Submission Flags](#)
[Details](#)



**Topic:**  
 Editors & Reviewers Confab

**Comments:** [View/Print All](#)

Participant	Comments	Date
Twink E. Jonesey, PhD	That's an excellent suggestion. Who can we get to implement this?	Jan 07 2015 10:49AM
Jack Bauer <small>(Reviewer 2)</small>	I agree with Ginger	Jan 06 2015 06:32PM
Ginger Rabelais <small>(Reviewer 2)</small>	As a frequent reviewer of this kind of article, I recommend...	Jan 06 2015 03:02PM
Twink E. Jonesey, PhD	Big Dog here, perhaps one of the Reviewers has a good idea about this.	Jan 05 2015 01:22PM
Mary Jones, PhD	Okay, what do you think of the current issue, Twinky? AKA Big Dog?	Jan 05 2015 01:02PM



**Editor Participants**

Editor Participant	Role	# Posts	Latest Post	Participant Status	View Reviews and Comments	Download Files	View Draft Decision Letter	
Edward M. Browdy	Associate Editor	0		Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
Mary Jones, PhD	Managing Editor	1	Jan 05 2015 01:02PM	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Send E-mail</a>
Twink E. Jonesey, PhD	Editor-in-Chief	2	Jan 07 2015 10:49AM	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Send E-mail</a>
June Hemmick	Associate Editor	0		Inactive	-	-	-	

**Reviewer Participants**

Reviewer Participant	Role	# Posts	Latest Post	Participant Status	Reviewer Number	Complete Review Submitted for Versions	Status of Most Recent Review Assignment	
Jack Bauer	Reviewer	1	Jan 06 2015 06:32PM	Active	Reviewer 1	R0	R0: Review Complete	<a href="#">Send E-mail</a>
Ginger Rabelais	Reviewer	1	Jan 06 2015 03:02PM	Active	Reviewer 3	R0	R1: Agreed to Review	<a href="#">Send E-mail</a>
Ron Raptor	NB Reviewer	0		Active	Reviewer 2	R0, R1	R1: Review Complete	<a href="#">Send E-mail</a>
George Bortnichak	Statistical Reviewer	0		Inactive			R0: Terminated After Agreeing to Review	
Sylvia W. Verdi	Reviewer	0		Inactive			R1: Agreed to Review	

# Editor Can Add Editor Participants

**Editor Candidates**

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

Select	Editor Role	Editor Name	Current Assignments	View Reviews and Comments	Download Files(source and companion)	View Draft Decision Letter	# Classification Matches	Classification Matches	Available during next 30 days
<input type="checkbox"/>	Associate Editor	<a href="#">Edward M. Browdy</a>	16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	1, 2, 3	Yes
<input type="checkbox"/>	Guest Editor (E)	<a href="#">Bella Marcello</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Editor-In-Chief <small>(This is Editor number 1 of the previous version) (This editor is already assigned to the current submission) (Current participant in the discussion)</small>	<a href="#">Twink E. Jonesey, PhD</a>	61	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	5	Yes
<input type="checkbox"/>	Editor-In-Chief	<a href="#">Karen Mulligan</a>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	2, 3	Yes
<input type="checkbox"/>	Editor-In-Chief	<a href="#">Buttercup Buddy Swatski</a>	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	2, 3	Yes
<input type="checkbox"/>	Associate Editor (E)	<a href="#">Ling Lang</a>	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Managing Editor <small>(Current participant in the discussion)</small>	<a href="#">Mary Jones, PhD</a>	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	4, 5	Yes

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

**Reviewer Candidates**

Select	Reviewer Participant	Role	# Posts	Latest Post	Participant Status	Reviewer Number	Complete Review Submitted for Versions	Status of Most Recent Review Assignment
<input checked="" type="checkbox"/>	<a href="#">Jack Bauer</a>	Reviewer	1	Jan 06 2015 06:32PM	Active	Reviewer 1	R0	R0: Review Complete
<input checked="" type="checkbox"/>	<a href="#">Ginger Rabelais</a>	Reviewer	1	Jan 06 2015 03:02PM	Active	Reviewer 3	R0	R1: Agreed to Review
<input checked="" type="checkbox"/>	<a href="#">Ron Raptor</a>	NB Reviewer	0		Active	Reviewer 2	R0, R1	R1: Review Complete
<input type="checkbox"/>	<a href="#">George Bortnichak</a>	Statistical Reviewer	0		Inactive			R0: Terminated After Agreeing to Review
<input type="checkbox"/>	<a href="#">Sylvia W. Verdi</a>	Reviewer	0		Inactive			R1: Agreed to Review

Cancel
Add Participants without Sending Letters
Proceed To Customize Letters

## Multi-Role User

- If a user is associated with a submission as both an Editor and a Reviewer, she is added as a participant with both roles, and may participate in the discussion as either role
  - She can post comments to the discussion as her currently-logged in role.



# User is both Editor and Reviewer of Submission

Participant	Comments	Date
Jordan Fleming	I have some contacts in that area. Let me chat with them and get back to you	Jan 10 2015 10:37AM
Twink E. Jonesey, PhD	That's an excellent suggestion. Who can we get to implement this?	Jan 07 2015 10:49AM
Jack Bauer	I agree with Ginger	Jan 06 2015 06:32PM
Jordan Fleming (Reviewer 3)	As a frequent reviewer of this kind of article, I recommend...	Jan 06 2015 03:02PM
Twink E. Jonesey, PhD	Big Dog here, perhaps one of the reviewers has a good idea about this.	Jan 05 2015 01:22PM
Mary Jones, PhD	Okay, what do you think of the current issue, Twinky? AKA Big Dog?	Jan 05 2015 01:02PM

Add Participants

**Editor Participants**

Editor Participant	Role	# Posts	Latest Post	Participant Status	View Reviews and Comments	Download Files	View Draft Decision Letter	
Edward M. Bandy	Associate Editor	0		Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
Jordan Fleming	NB Editor	1	Jan 10 2015 10:37AM	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
Mary Jones, PhD	Managing Editor	1	Jan 05 2015 01:02PM	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
Twink E. Jonesey, PhD	Editor-in-Chief	2	Jan 07 2015 10:49AM	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Send E-mail</a>
June Hemmick	Associate Editor	0		Inactive	-	-	-	

**Reviewer Participants**

Reviewer Participant	Role	# Posts	Latest Post	Participant Status	Reviewer Number	Complete Review Submitted for Versions	Status of Most Recent Review Assignment	
Jack Bauer	Reviewer	1	Jan 06 2015 06:32PM	Active	Reviewer 1	R0	R0: Review Complete	<a href="#">Send E-mail</a>
Jordan Fleming	Reviewer	1	Jan 06 2015 03:02PM	Active	Reviewer 3	R0	R0: Review Complete	<a href="#">Send E-mail</a>
Ron Raptor	NB Reviewer	0		Active	Reviewer 2	R0, R1	R1: Review Complete	<a href="#">Send E-mail</a>
George Bortnichak	Statistical Reviewer	0		Inactive			R0: Terminated After Agreeing to Review	
Sylvia W. Verdi	Reviewer	0		Inactive			R1: Agreed to Review	

Editor Comment

Reviewer Comment

Editor Participant

Reviewer Participant



# Configuration

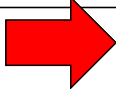
- Step 1 – Configure Topic Template
- Step 2 – Configure Automatic Discussion Initiation
  - By Article Type
- Step 3 – Configure Custom Instructions
- Step 4 – Configure Letters for Reviewers



# Step 1 – Configure a Topic Template

- Any number of Reviewer Consultation topic templates can be created
- Similar to configuration for an Editor Consultation topic template

## Configure Discussion Topic Templates



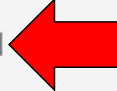
Order	Type	Description	Actions
<input type="text" value="1"/>	Editor Consultation	Default Topic Template	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="2"/>	Editor Consultation	Decision Letter Review	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="3"/>	Editor Consultation	Master Topic Template	<a href="#">Edit</a> (Master)
<input type="text" value="4"/>	Reviewer Consultation	Reviewer Feedback	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="5"/>	Reviewer Consultation	Open Discussion w/ Reviewers	<a href="#">Remove</a> <a href="#">Edit</a>

# Adding a 'Reviewer Consultation' Topic Template

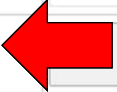
- Select *Discussion Topic Template Type* at top
- Fields related to manual discussion initiation disabled
- New *'Reviewer Discussion Letters'* section

**Add Discussion Topic Template**

There are two types of discussions: Editor Consultation and Reviewer Consultation. The set of configuration options differs slightly for the two types. ([more...](#))

Discussion Topic Template Type: **Reviewer Consultation** 

[Open SpecialCharacter Palette](#)

<b>Discussion Topic Template Name</b>	Find Qualified Reviewers
<b>'Initiate Discussion' Page Custom Instructions</b>	
<b>Topic</b>	Suggestions for Good Reviewers <input checked="" type="checkbox"/> Allow user to modify Topic name when initiating a discussion
<b>Initial Comments</b>	This discussion allows all Editors and Reviewers assigned to a submission to discuss it over the lifetime of the submission. <input type="checkbox"/> Allow user to modify Initial Comments when initiating a discussion
<b>Default Editor Participant Permissions</b>	<input checked="" type="checkbox"/> View Reviews and Comments <input type="checkbox"/> Download Files (source and companion) <input type="checkbox"/> View Draft Decision Letter
<b>Editor Access to 'Details' Link</b>	<input checked="" type="checkbox"/> Display 'Details' link in Submissions with Active Discussions folder and on Discussion page. Select the Details Page Layout that participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts.' Editorial Kitchen Sink
<b>Editor Discussion Letters</b>	Select the Letter to send asking Editors to participate: Editor - You have been added to a discussion Select the notification letter to send to Editors when comments are posted: Editor - New Comment Posted to Discussion <input type="radio"/> Notify discussion initiator only <input checked="" type="radio"/> Notify all active Editor participants
<b>Reviewer Discussion Letters</b>	Select the Letter to send asking Reviewers to participate: Reviewer - You have been added to a discussion Select the notification letter to send to Reviewers when comments are posted: Reviewer - New Comment Posted to Discussion

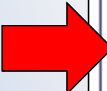
**Hide** When you **Hide** a Discussion Topic Template, it will no longer be available for selection on the Initiate Discussion page.

# Configure Automatic Discussion Initiation

- As Article Type/Discussion Trigger combinations
- For a Reviewer Consultation discussion, go to the intersection of the desired Article Type and the new column “First Editor Confirmed”, select the option, and select a Reviewer Consultation Topic Template

**Configure Automatic Discussion Initiation**

In the grid below, for each Article Type, you may specify the types of discussions to be opened automatically for a submission based on a Discussion Trigger. ([more...](#))

Discussion Trigger Article Type	Editor Agrees to Assignment	First Editor Confirmed
 Original Study	<input type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: <a href="#">Select All</a> <a href="#">Clear All</a> Associate Editor Editor-In-Chief Everything Editor Guest Editor Editor Consultation Topic Templates: Please Choose a Topic Template	<input checked="" type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: HASS Editor & Reviewer Confab

# Step 3 – Configure Custom Instructions

- Separate instructions for Editors and Reviewers

**Configure Discussion Forum Settings**

---

**Custom Instructions**

[Open Special Character Palette](#)

Enter any instructions that you would like to appear on the Editor version of the Discussion page.

Hi Editor. Please feel free to participate in this discussion.

Enter any instructions that you would like to appear on the Reviewer version of the Discussion page.

Hi Reviewer. Please participate in the discussion for this submissions. (This text is customizable.)

- Instructions display on the Discussion page

**Discussion for Manuscript Number: JANETDEV120-D-15-00003**  
**Maney M. Alexander, PhD**  
**"Roses are Red - VIOLETS"**

[Close](#)

Please participate in the discussion for this submission. (This text is customizable.)

[View Submission](#)   [View Reviewer Comments](#)

**Topic: Editors & Reviewers Forum**

**Comments:** [View/Print All](#)

Participant	Comments	Date
Twink E. Jonesey, PhD	I will be on sabbatical for 4 months starting Feb 2, 2015	Dec 12 2014 04:45PM

# Merge Fields for Reviewer Consultations

***%REVIEWER\_DISCUSSION\_DEEP\_LINK%*** - new deep link

- Logs Reviewer into EM, navigates to the *Completed Reviews* folder, and opens the *Discussion* page for the submission's Reviewer Consultation discussion

Letter Body: [Insert Image](#) | [Insert Custom Merge Field](#) | [Insert System Merge Field](#)

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

Dear %TITLE% %LAST\_NAME%,

Thank you for reviewing this manuscript.

To view the Reviewer PDF, click here:  
%VIEW\_REVIEWER\_PDF%

To participate in a discussion with the Editors and Reviewers of this submission, click here:  
%REVIEWER\_DISCUSSION\_DEEP\_LINK%

Kind regards,

%EDITOR\_NAME%  
%EDITOR\_ROLE%  
%JOURNAL\_URL%

# Merge Fields for Reviewer Consultations

***%DISCUSSION\_POST%*** - existing deep link now populates for Reviewers as well as Editors

Letter Body: [Insert Custom Merge Field](#) | [Insert System Merge Field](#)

Hello %TITLE% %LAST\_NAME%,

Greeting: %GREETING%,

A new comment has been posed to the discussion for this manuscript  
%MS\_NUMBER%:  
%ARTICLE\_TITLE%  
%CORRAUTHOR%  
%JOURNALFULLTITLE%

Click here to access the discussion:  
%DISCUSSION\_POST%

Looking forward to your feedback.

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

Regards

## Step 4a – Configure Reviewer Letters



New merge field `%REVIEWER_DISCUSSION_DEEP_LINK%` available for these four types of letters:

- *‘Review Assignment Completed’* letter
  - Sent when Reviewer submits a complete review
  - This is the Reviewer’s invitation to the discussion
- *Reviewer Notification* letter
  - Sent when an Author Notification letter is sent (Author is notified of a decision)
- *Discussion notification* letter
  - Sent when a comment is posted
- *Discussion invitation* letter
  - Sent if a closed discussion is re-opened



## Step 4b – Configure Editor/Reviewer Letters

- For Reviewer letters, include the new deep link
  - %REVIEWER\_DISCUSSION\_DEEP\_LINK%
- For Editor letters, include the existing deep link
  - %DISCUSSION\_DEEP\_LINK%
- For both Reviewers and Editors, include the existing deep link
  - %DISCUSSION\_POST%

# Possible Future Enhancements for Reviewer Consultation Discussions



- Initiate manually
- Allow than one Reviewer Consultation discussion for a submission
- Allow Reviewers not associated with a submission to be added
- Add Reviewers as 'active' participants before they complete a review (for Open Peer Review workflows)

# Discussion Time!

- Questions
- Feedback



The End!

