CONFIDENTIAL AND PROPRIETARY

Release Notification

Editorial Manager®

ProduXion Manager™

Commerce Manager™

Editorial Manager/ProduXion Manager
10.0 General Release Notification
3/19/2013
Draft – Subject to Change

Document Change Log

Date	Version	Change
12/06/2012	Beta Release	Beta version
01/23/2013	Gamma Release	Typographical errors
03/13/2013	General Release	Include supplemental notes (Enhanced Password Security)

Editorial Manager/ProduXion Manager 10.0 General Release Notification

GENERAL ENHANCEMENTS

Enhanced Password Security

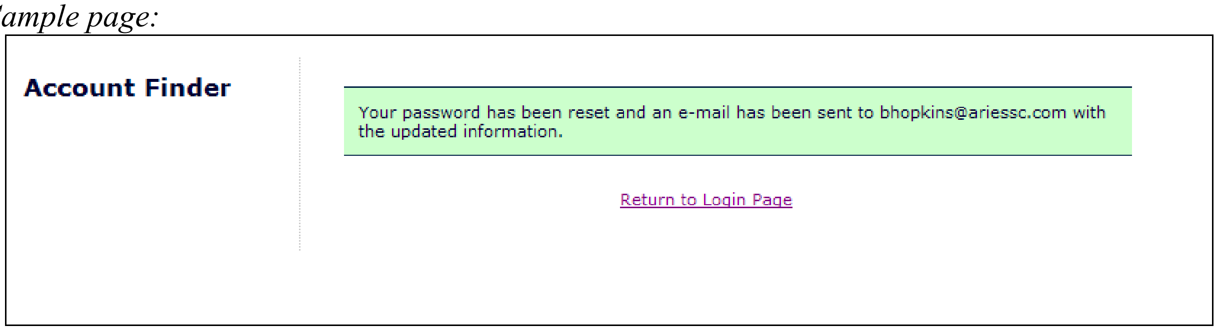
In EM/PM v9.2, users can request to have their username and password sent to them via e-mail. Editors (with proper permission) can also send the username and password by clicking a button on a user's People Record. When a user clicks the "Send Password" or "Send Username and Password" button on the *Account Finder* page, or an Editor clicks the "Send Username/Password" button on the *Search People – Update Information* page, the letter configured for the Author Role at the "Forgot Username or Password" event is sent. If the publication has included the password and/or username merge fields in the letter template, then the letter sent to the primary recipient will contain the corresponding information for their user record.

New in v10.0, Aries has taken steps to make the password notification process more secure by ensuring that only temporary passwords are included in e-mails. When a user requests that their username and/or password be sent to them (either by clicking a link or requesting the Editorial Office to send their password), EM/PM will reset the user's password to a temporary password. The temporary password is a system-generated password that adheres to the publication's current password profile. The user's people record is updated with the new password with an accompanying flag signifying that the password must be reset upon the user logging into the system.

NOTE: If the publication is in a People Sharing Group, the user's new password is propagated to the other publications in the group, along with the "must be reset" flag.

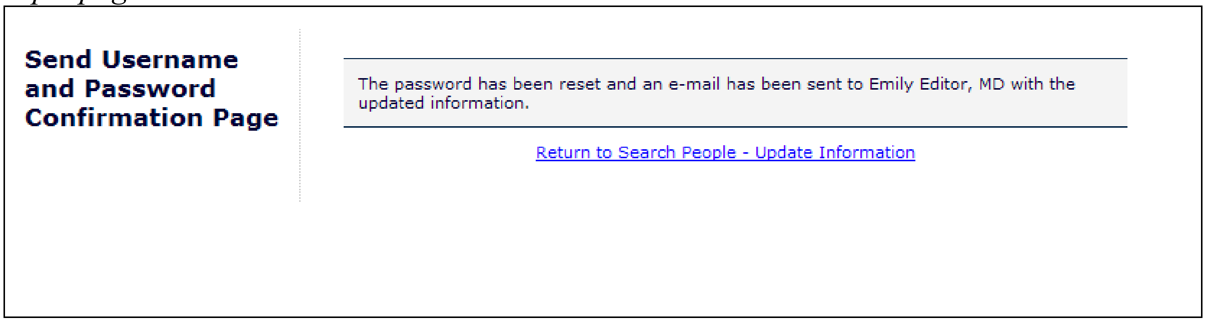
When a user clicks on either the Send Username/Password link or the Send Password link on the *Login* page, and the new setting is enabled, the system will issue a temporary password that will be included in the letter. The user will see a confirmation page letting them know that their password has been reset.

Sample page:



When an Editor clicks the "Send Username/Password" button on the *Search People – Update Information* page, and this new setting is enabled, the system also issues a temporary password that will be included in the letter sent to the user whose record is being viewed at the time the button is clicked. The Editor will see a slightly different confirmation page letting them know the password has been reset and an email has been sent to the user.

Sample page:



Send Username and Password Confirmation Page

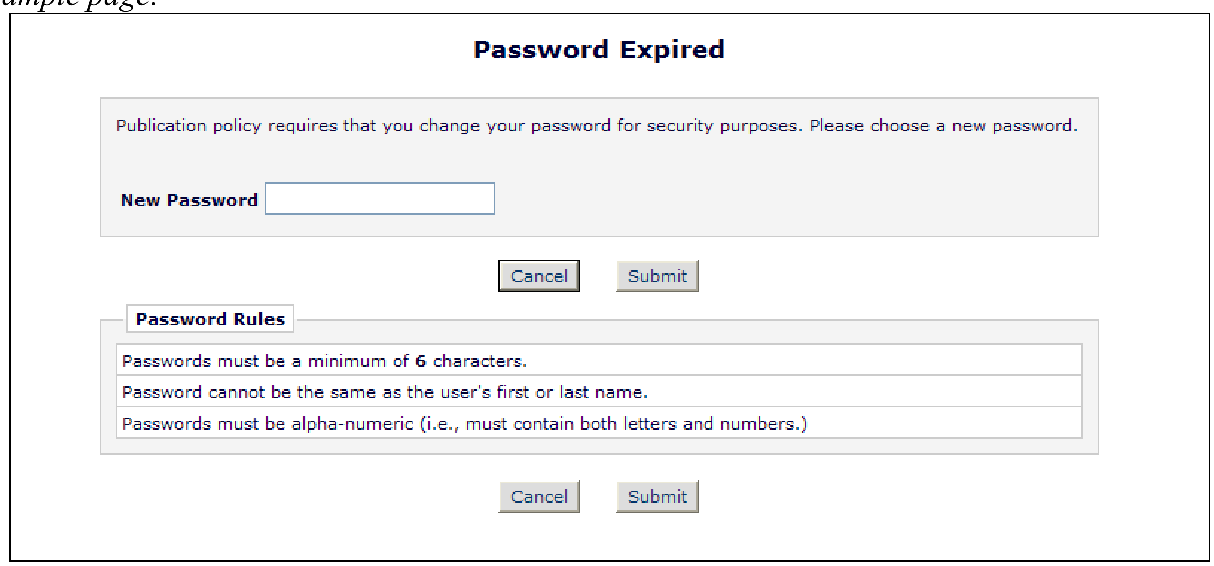
The password has been reset and an e-mail has been sent to Emily Editor, MD with the updated information.

Return to Search People - Update Information

NOTE: An administrator may still change the user's password manually by changing it in the Password field and submitting the page. However, if the administrator clicks the "Send Username/Password" button after changing the password but before submitting the page, the system will generate a temporary password before sending the letter.

When the publication is configured to generate a temporary password when sending the "Forgot Username or Password" letter, and when a user has logged in with a password that must be reset, she is brought to the *Password Expired* page, where she is asked to reset her password. The page displays a full set of the publication's currently configured "Password rules", including a message that the user must reset her password after it has been reset.

Sample page:



Password Expired

Publication policy requires that you change your password for security purposes. Please choose a new password.

New Password

Cancel Submit

Password Rules

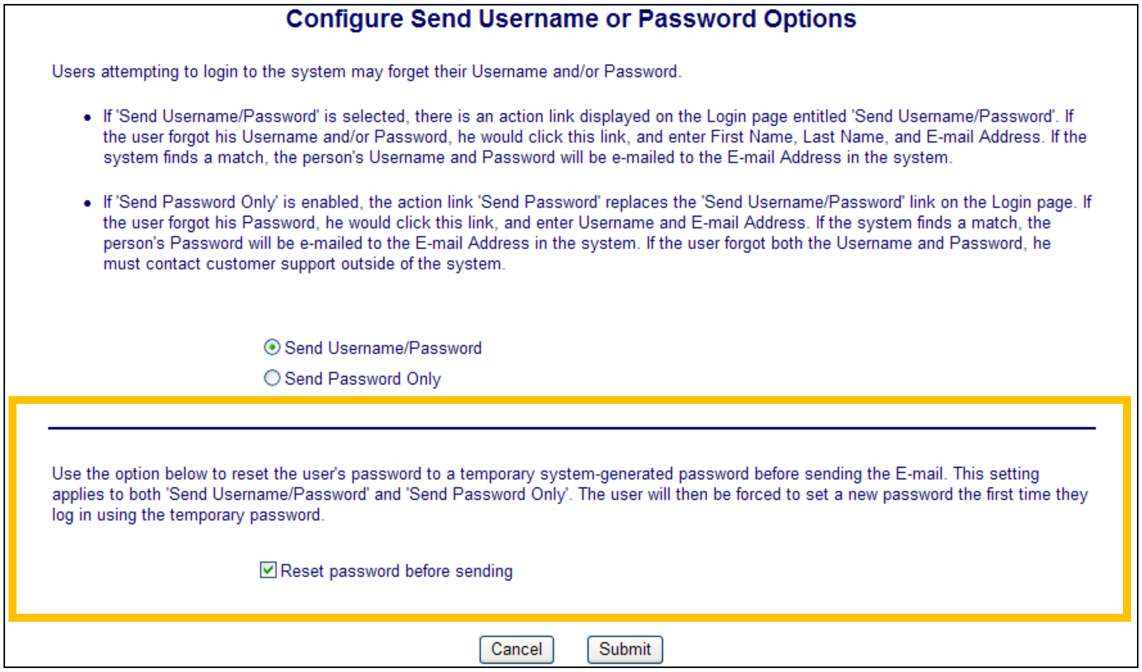
Passwords must be a minimum of **6** characters.
Password cannot be the same as the user's first or last name.
Passwords must be alpha-numeric (i.e., must contain both letters and numbers.)

Cancel Submit

When the password reset succeeds, the user is brought to their main menu.

TO CONFIGURE:
NOTE: On implementation, this feature will be enabled/turned on.

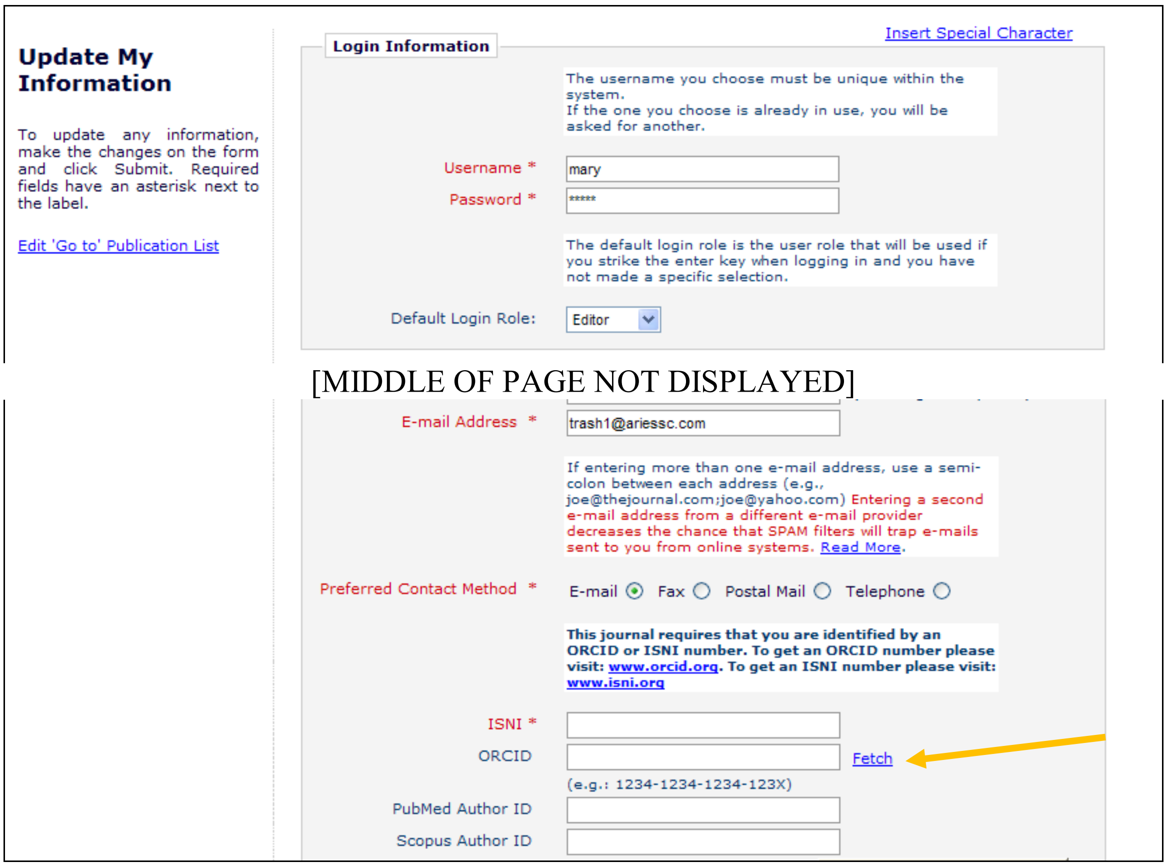
To disable this new Password Security feature for your publication, go to PolicyManager, and click the Configure Send Username or Password Options link. Uncheck/unselect the 'Reset password before sending' box in the lower part of the page.


Configure Send Username or Password Options
Users attempting to login to the system may forget their Username and/or Password.
If 'Send Username/Password' is selected, there is an action link displayed on the Login page entitled 'Send Username/Password'. If the user forgot his Username and/or Password, he would click this link, and enter First Name, Last Name, and E-mail Address. If the system finds a match, the person's Username and Password will be e-mailed to the E-mail Address in the system.
If 'Send Password Only' is enabled, the action link 'Send Password' replaces the 'Send Username/Password' link on the Login page. If the user forgot his Password, he would click this link, and enter Username and E-mail Address. If the system finds a match, the person's Password will be e-mailed to the E-mail Address in the system. If the user forgot both the Username and Password, he must contact customer support outside of the system.
Send Username/Password
Send Password Only
Use the option below to reset the user's password to a temporary system-generated password before sending the E-mail. This setting applies to both 'Send Username/Password' and 'Send Password Only'. The user will then be forced to set a new password the first time they log in using the temporary password.
Reset password before sending
Cancel
Submit

Additional Personal Identifier Functionality – ORCID

In EM/PM v9.2, publications may configure Personal Identifier fields as optional or required information for Registration or adding Co-Authors to a submission. There are five (5) Identifiers that may be requested: ORCID, PubMed Author ID, ISNI, ResearcherID, and Scopus Author ID.

New in EM/PM v10.0, users may now look up and/or confirm the ORCID for themselves or Co-Authors using a new 'Fetch' option. Clicking this link uses the ORCID API search feature to request a list of ORCID profiles that match people metadata on the calling page.



When the Fetch link is clicked, a search is run of the ORCID database using any of the following data if present on the current page:

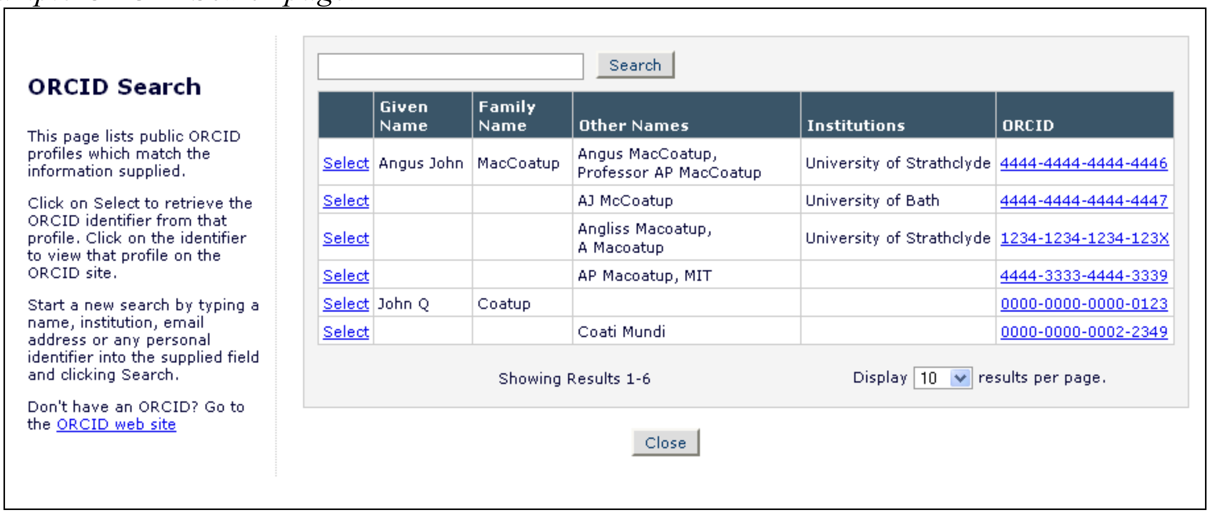
- First Name
- Last Name
- Secondary First Name
- Secondary Last Name
- E-Mail Address
- Institution
- ORCID

A list of matching profiles is presented to the user with highest-ranked hits displayed first. The results are displayed 10 per page, however users may choose to display up to 100 on a page with the 'Display' dropdown. Each ORCID Identifier is shown as a link to the associated public

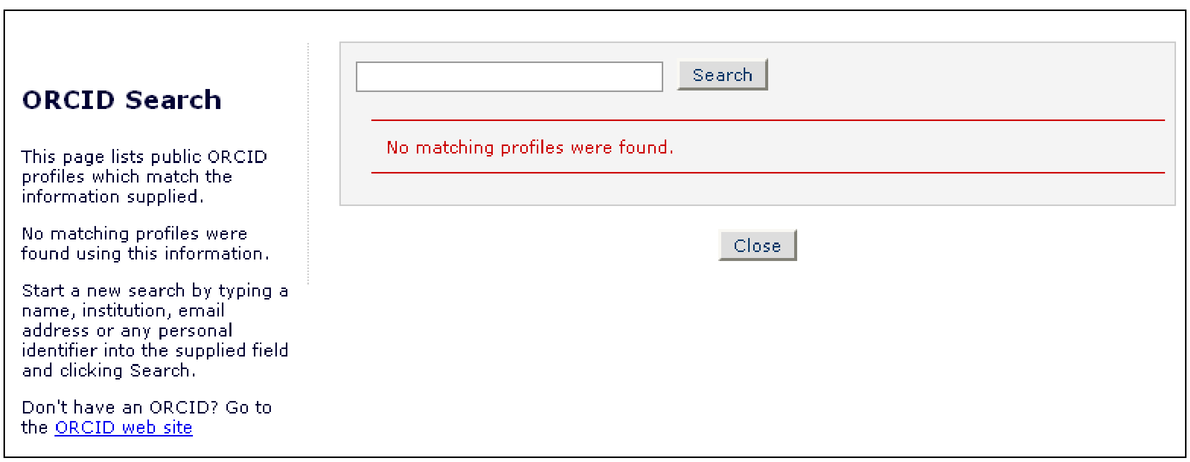
ORCID Profile. When the user knows which record is the correct record, he clicks the Select link next to the desired record to retrieve the associated ORCID Identifier.

NOTE: This initial search is an “OR” search on all relevant fields that are present, returning records that match any term. This may result in a large set of matching records. Records that match the most fields will be ranked higher and displayed first, so in most cases the required record will appear in the first couple of pages.

Sample ORCID Search *page:*



If no matching profiles are found, a message displays to the user. He may then enter a new search in the ‘Search’ box to modify the criteria against which the search is executed.



NOTE: A Search that is triggered from the *ORCID Search* page is an “AND” search. Adding more terms in the ‘Search’ box will narrow the results to only those records that match all terms. This may be useful if the original search returned too many results.

The Fetch link displays wherever the ‘ORCID’ data entry field appears for users (when configured):

- Update My Information

- Add/Edit Other Authors
- Register
- Proxy Register New User

Additionally in 10.0, when an ORCID has been entered for a user, then the ORCID now displays as a hyperlink wherever it displays. Clicking the link opens the related ORCID profile in a new window.

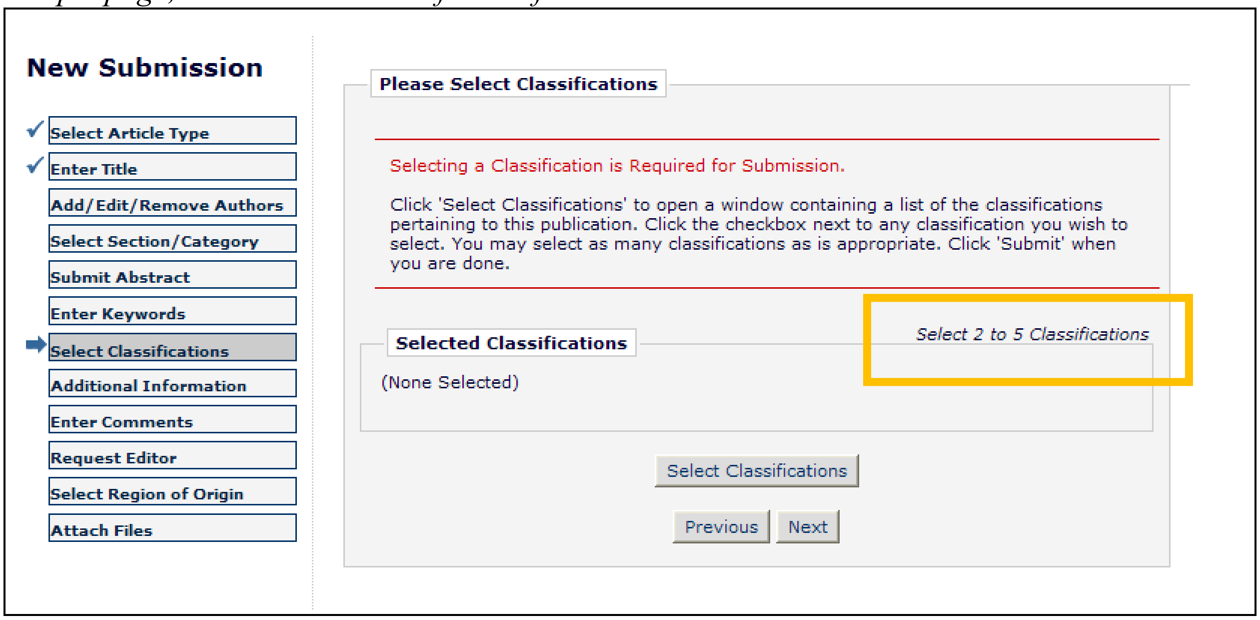
TO CONFIGURE:
No additional configuration is necessary. When the ORCID personal identifier field is configured to be optional or required in areas in EM, the new ‘Fetch’ functionality will be made available.

Require Minimum Classifications on Submissions

In EM v9.2, Publications may configure both a minimum and maximum number of Personal Classifications a user may select. Publications may also configure a maximum limit for Submission Classifications by Article Type, but there is no minimum limit for Submission Classifications by Article Type; making classification selection 'required' on a submission means that the user must select at least one classification.

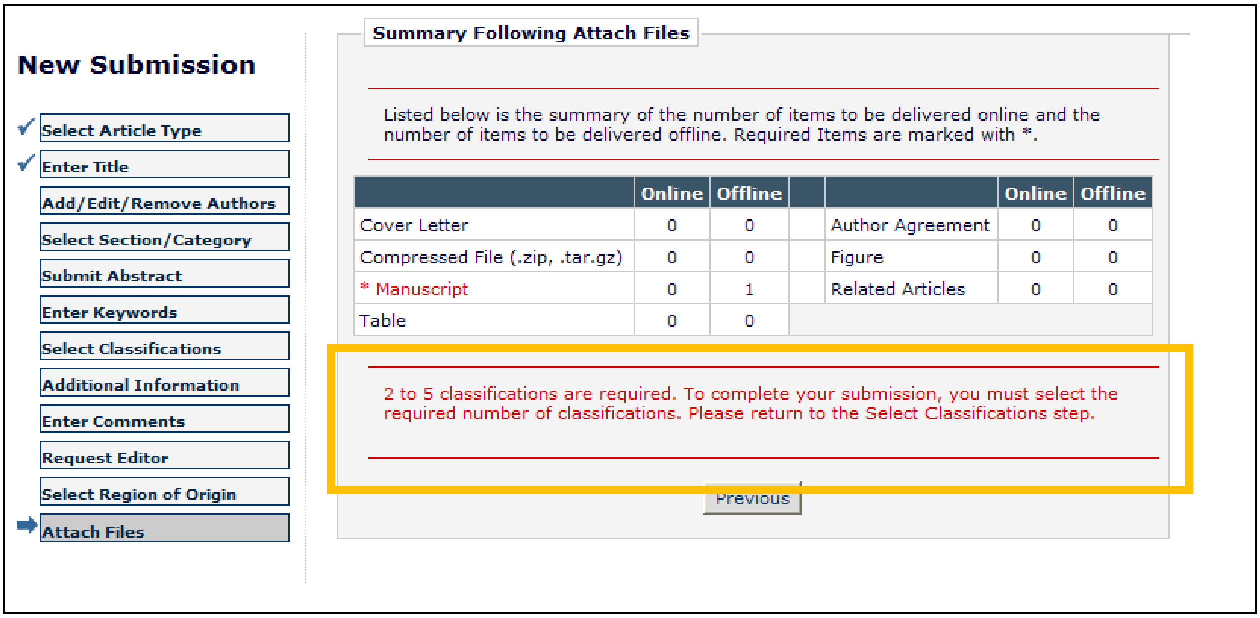
New in EM v10.0, a new setting is available on *Edit Article Type* to allow publications to require a minimum number of Submission Classifications. When an Article Type is configured to require Classifications, and a Minimum is set, then the Author will see text letting him know how many Classifications must be selected:

Sample page; Minimum number of Classifications set to 2:

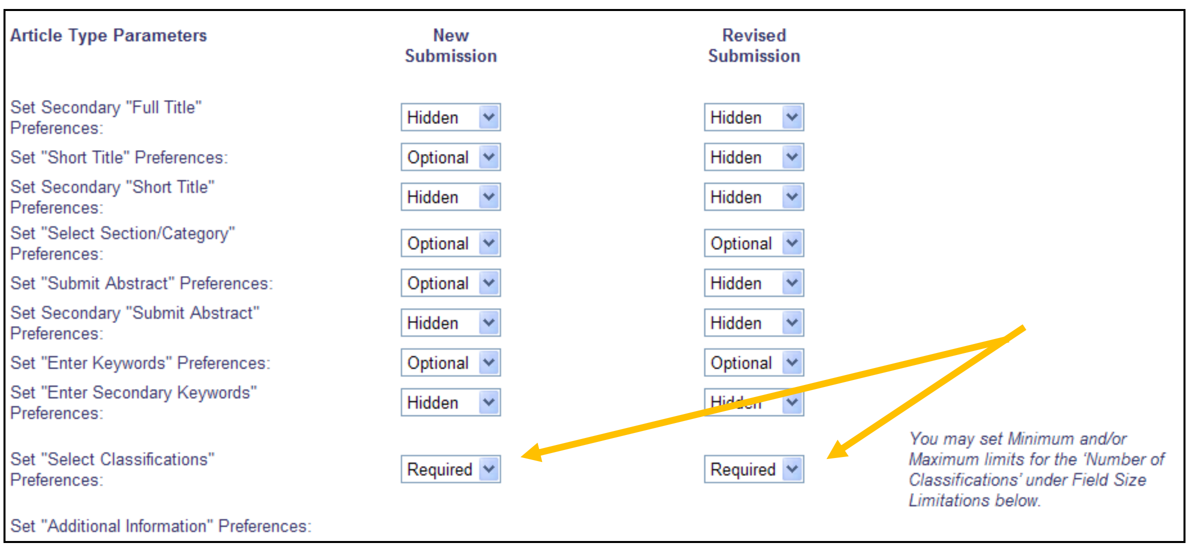


NOTE: If an Editor (or Publisher Role) edits a submission where Minimum/Maximum Classifications limits are configured, she will not be restricted to those limits. You may wish to mark Classifications on Revisions as "Hidden" from the Author if Editors are likely to add Classifications under or over the configured amounts.

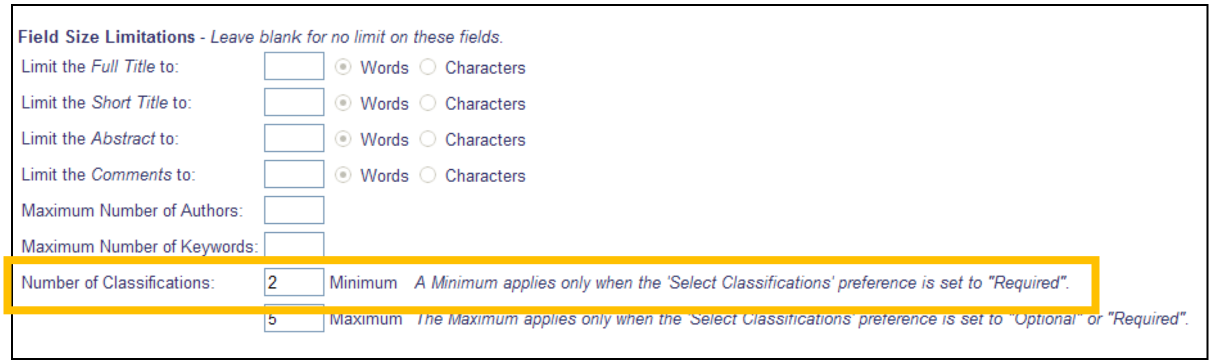
If an Author does not select the required number of Classifications, he will not be allowed to complete his submission until the required information is completed.



TO CONFIGURE:
To use the new Minimum Classifications feature on Submissions, go to PolicyManager, Edit Article Types, and Edit an existing Article Type or ‘Copy’ or ‘Add’ a new one. In the ‘Article Type Parameters’ section, select “Required” in the ‘New Submission’ column or ‘Revised Submission’ column for the ‘Set "Select Classifications" Preferences’ option.



In the ‘Field Size Limitations’ section, enter a number in the ‘Minimum’ box under ‘Number of Classifications’.



NOTE: A minimum applies only when the 'Select Classifications' preference is set to "Required".

Missing Co-Author Information Notice

In EM v9.2, publications may configure what information Corresponding Authors need to provide when adding Co-Authors to a submission, and which pieces of information are required for the submission to be complete. Authors may add a Co-Author without completing all information should they need to gather the information for entry at a later time. An asterisk marks the Edit link for that Author in the Author grid. When Authors continue to the end of the manuscript submission process without completing all required information, a message asks them to go back and fill in the missing information. Because Co-Author information is entered via a pop-up interface, the asterisk in the Other Author Grid is not always obvious to the Corresponding Author, and the Authors often find it difficult to determine what is missing and how to enter it.

New in EM v10.0, an enhanced "missing author information" message is presented at the final step prior to building the PDF. This new message tells the Author exactly which Co-Authors are missing information and provides links to edit each Co-Author's information.

TO CONFIGURE:
No configuration is required for this new feature. On upgrade to v10.0, Authors will see this new warning when they have forgotten to enter required Co-Author information on the 'Add/Edit/Remove Authors' step of the submission process.

Co-Author Verification and/or Registration on Revised Submissions

In EM v9.2, publications may configure Article Types to require Other (Co-) Authors to verify that they are a Contributing Author on a submission, or verify as a registered user (either by registering, or logging in using an existing account). When an Article Type has either option configured, then all Other Authors are sent a letter (if configured) when the Corresponding Author approves the submission and sends it to the publication.

Some publications find this feature useful, but would prefer that the Other Authors not be asked to verify until a submission is being revised and therefore has a better chance of being published. New in EM v10.0, two new options are made available for initiating the Other Author Notification process.

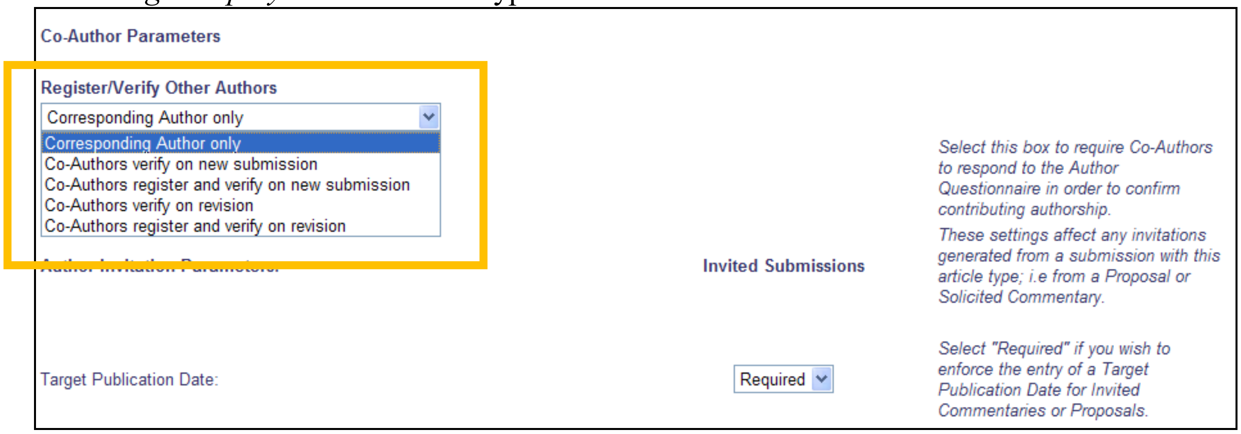
- Co-Authors verify on revision – When this option is selected, the first verification request is sent to all Other Authors when the first Revision of a submission (R1) is sent to the publication.
- Co-Authors register and verify on revision – When this option is selected, the first registration and verification request is sent to all Other Authors when the first Revision of a submission (R1) is sent to a publication.

Additionally, the existing three (3) options are re-named for clarity, though the functionality is unchanged:

- "Only Corresponding Author must be registered" is now "Corresponding Author Only"
- "Require Other Authors to verify that they are co-authors on the submission" is now "Co-Authors verify on new submission"
- "Require Other Authors to register and verify that they are co-authors on the submission" is now "Co-Authors register and verify on new submission"

TO CONFIGURE:
To select one of the new trigger points for the existing "Notify Other Authors" event, go to PolicyManager, Edit Article Types, and edit an existing Article Type, or add a new Article Type. In the new 'Co-Author Parameters' section, select the desired option from the 'Register/Verify Other Authors' drop-down. NOTE: Though the existing options are re-labeled, the existing (v9.2) settings are retained on upgrade to v10.0; just the labels of the existing options are changed.

Partial Page Display – Edit Article Type:



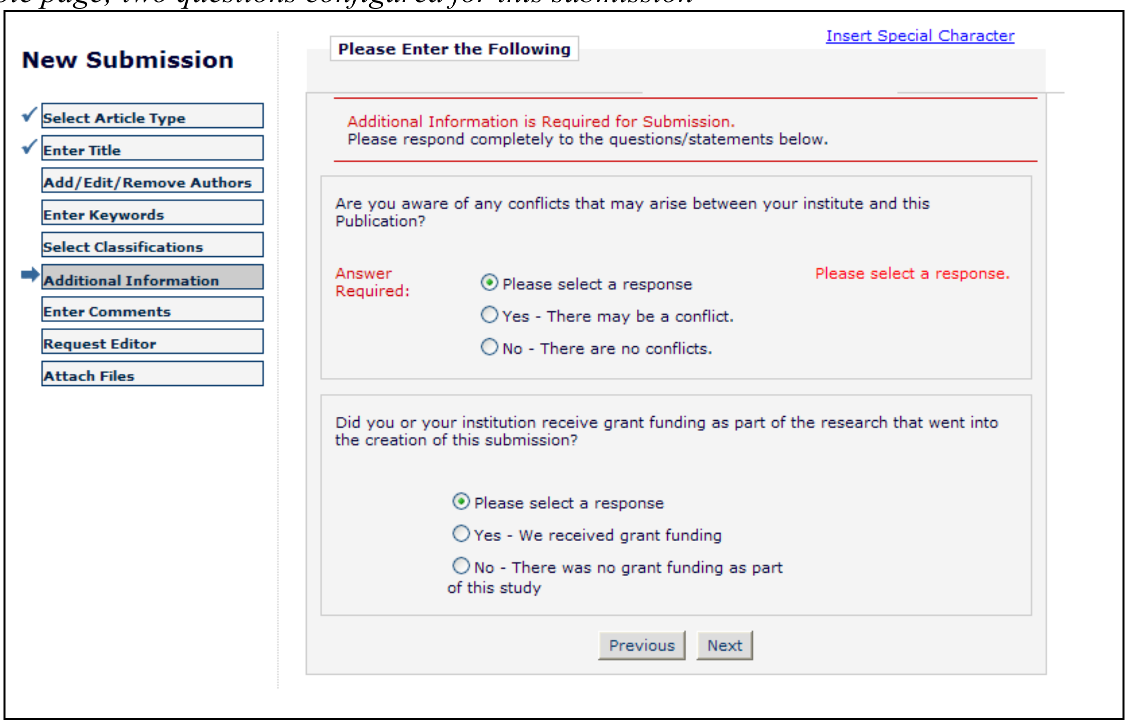
Multi-part Custom Questions for Author and Co-Authors

In EM/PM v9.2, Publications may configure a series of Custom Questions to be asked of Corresponding Authors when submitting a manuscript (these questions are also available when using the 'Create Submission' feature from the *Production Tasks* menu). These questions may ask for responses in a variety of formats (text, date, integer, decimal, or a list type, including radio button, drop down menu, or checkboxes), and are combined to make Questionnaires that are then assigned to Article Types.

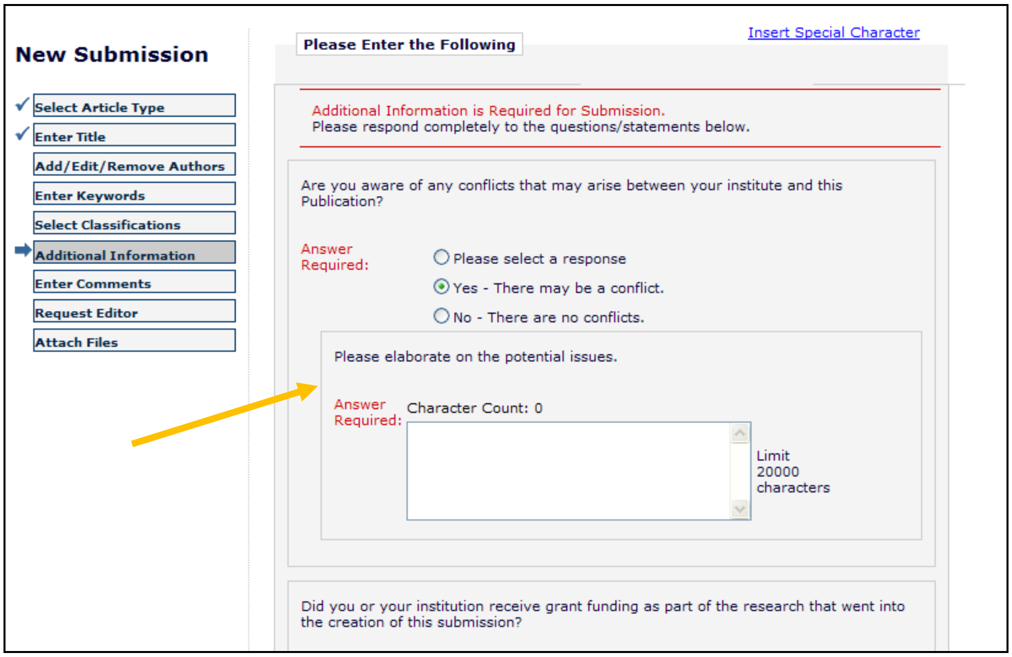
New in EM/PM v10.0, Custom Questions may now be configured to have multiple levels of questions, allowing for one or more follow-up questions to be asked depending on the answer selected for the initial question.

When the Author first goes to the 'Additional Information' step of the submission process, she will see the Top-Level questions, as currently displayed in v9.2.

Sample page; two questions configured for this submission



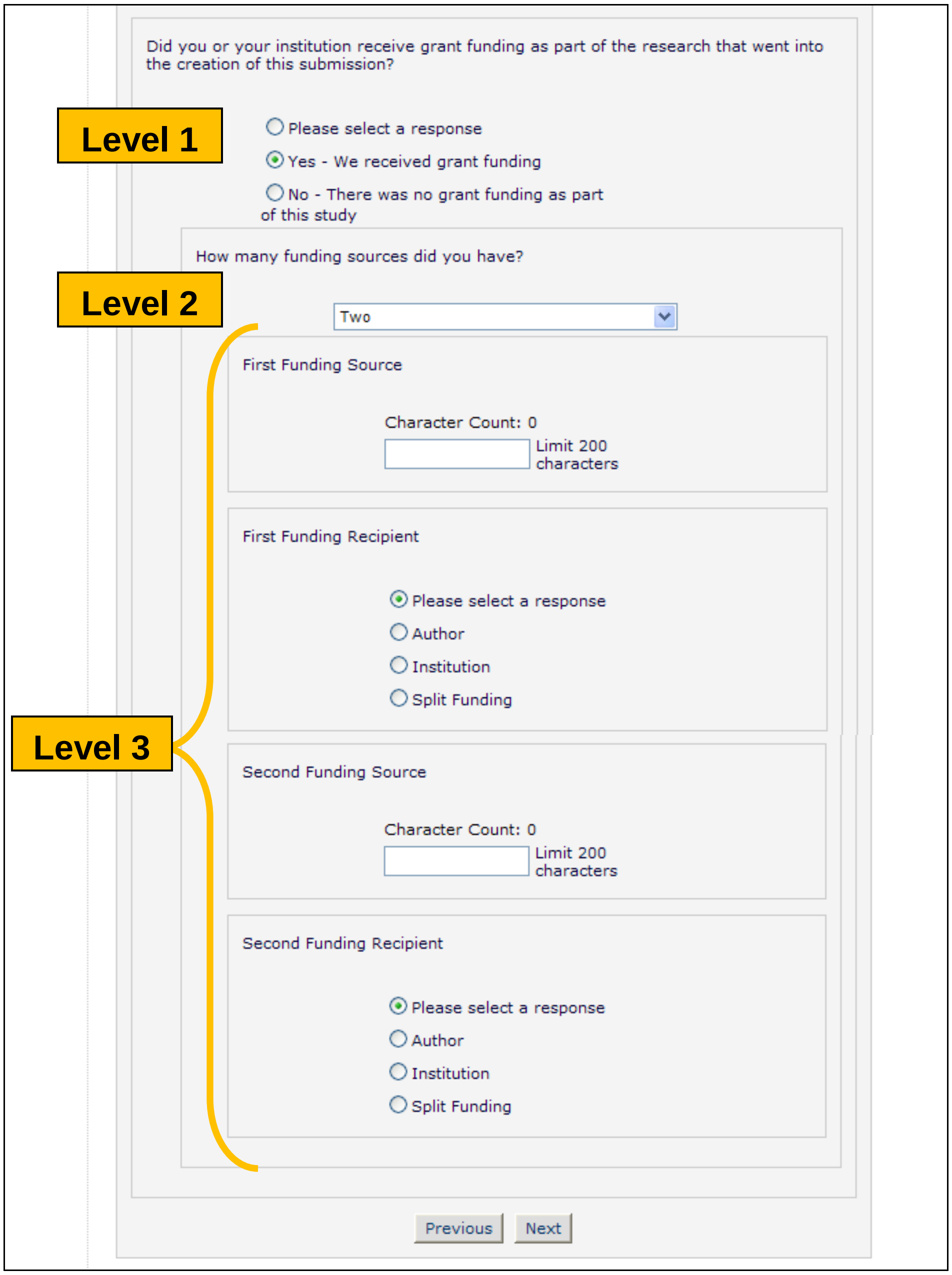
When the Author selects an answer that is configured to trigger a follow-up question, the page refreshes and the Follow-up Question(s) display. In this example, a Follow-up Question has been configured for a selected response of 'Yes – There may be a conflict' on the Primary Question of "Are you aware of any conflicts that may arise between your institute and this Publication?"



The Author may now provide additional information describing the potential conflicts. NOTE: If a Primary Question is configured as 'Required', all Follow-up Questions are also Required for the submission.

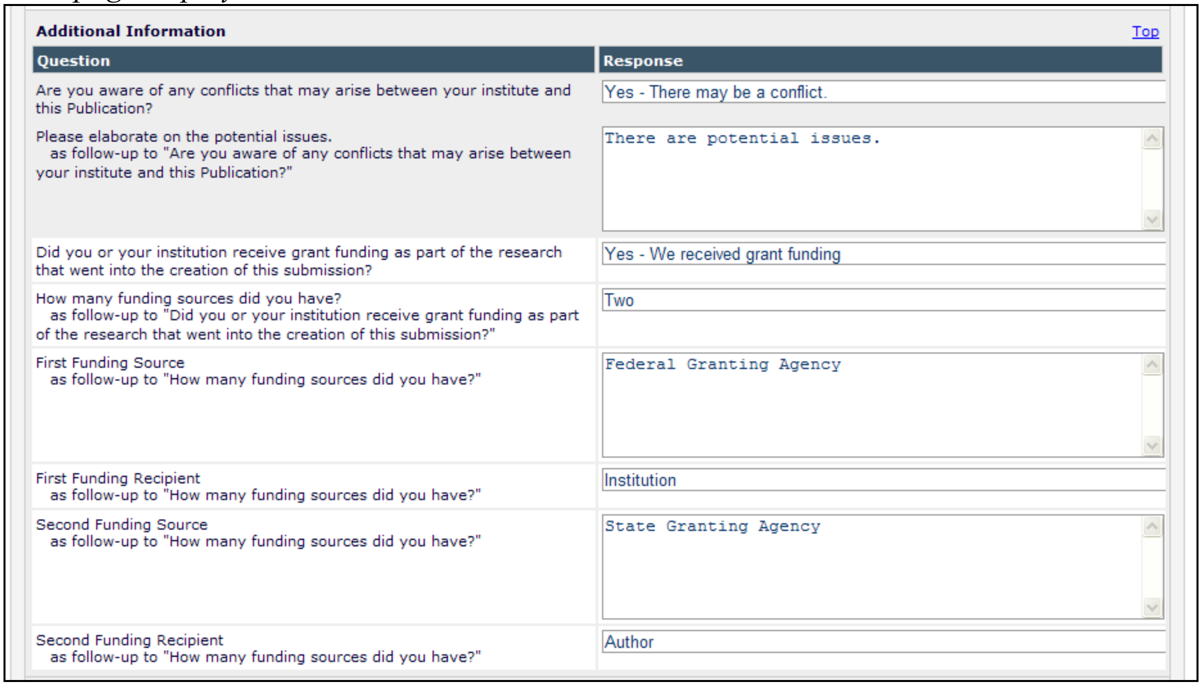
In this next example, a Follow-up Question is configured for an answer of 'Yes – we received grant funding' given for the Primary Question "Did you or your institution receive grant funding as part of the research that went into the creation of this submission?" A third level of Follow-up Questions is configured based on the number selected in the drop-down response for this Second Level Question. In this case, for a selected response of 'Two' on the Second Level Question "How many funding sources did you have?", additional Follow-up Questions appear asking the Author to identify the two funding sources and declare who received the funding; the Author directly, the Institution, or was the funding split between the two.

Three levels of questions; a Primary Question can have up to two levels of Follow-up Questions configured:



Once a manuscript has been successfully submitted to the editorial office, Editor Roles have read-only access to all Questions and Author responses on the default *Details* pages (if the Question is configured to be displayed).

Partial page display; Details*:*



Additional Information Top

Question	Response
Are you aware of any conflicts that may arise between your institute and this Publication?	Yes - There may be a conflict.
Please elaborate on the potential issues. as follow-up to "Are you aware of any conflicts that may arise between your institute and this Publication?"	There are potential issues.
Did you or your institution receive grant funding as part of the research that went into the creation of this submission?	Yes - We received grant funding
How many funding sources did you have? as follow-up to "Did you or your institution receive grant funding as part of the research that went into the creation of this submission?"	Two
First Funding Source as follow-up to "How many funding sources did you have?"	Federal Granting Agency
First Funding Recipient as follow-up to "How many funding sources did you have?"	Institution
Second Funding Source as follow-up to "How many funding sources did you have?"	State Granting Agency
Second Funding Recipient as follow-up to "How many funding sources did you have?"	Author

Editors and Publishers with appropriate permission also have access to all Questions and Author responses on the *Transmittal Form* (when the Question is configured to display on the *Transmittal Form*):

- If a Question is not configured to be editable on the *Transmittal Form* from the *Create Custom Questions* page, Author responses are displayed as basic text under the 'Value' column.
- If a Question is configured to be editable on the *Transmittal Form* from the *Create Custom Questions* page, an Edit Response link displays next to the Primary Question. To Edit any responses of the connected Questions, the user must click this link to open a new Window. This allows for the possibility that changing an Author's answer may change the Follow-up Questions that are configured to display.

Transmittal Form for Manuscript Number: Unassigned
"Demonstration of Follow-Up Questions"

Transmit to production system by clicking the 'Release to Production' button.

Source Files

[MIDDLE OF PAGE NOT DISPLAYED]

Are you aware of any conflicts that may arise between your institute and this Publication?	Edit Response	( ) Please select a response (•) Yes - There may be a conflict. ( ) No - There are no conflicts.	
Please elaborate on the potential issues. as follow-up to "Are you aware of any conflicts that may arise between your institute and this Publication?"		There are potential issues.	
Did you or your institution receive grant funding as part of the research that went into the creation of this submission?		Yes - We received grant funding	
How many funding sources did you have? as follow-up to "Did you or your institution receive grant funding as part of the research that went into the creation of this submission?"		Two	
First Funding Source as follow-up to "How many funding sources did you have?"		Federal Granting Agency	
First Funding Recipient as follow-up to "How many funding sources did you have?"		Institution	
Second Funding Source as follow-up to "How many funding sources did you have?"		State Granting Agency	
Second Funding Recipient as follow-up to "How many funding sources did you have?"		Author	
This is a List for Caroline			
Name of Pet		Please Choose a Value	
Would you like to recieve special offers and promotions?			

Cancel | Save Changes | Proof & Print

Sample pop-up page; Edit Response link has been clicked:

Cancel | Save and Close

"Demonstration of Follow-Up Questions"

Kermit the Frog (Corresponding Author)

Open Special Character Palette

Are you aware of any conflicts that may arise between your institute and this Publication?

( ) Please select a response
(•) Yes - There may be a conflict.
( ) No - There are no conflicts.

Please elaborate on the potential issues.

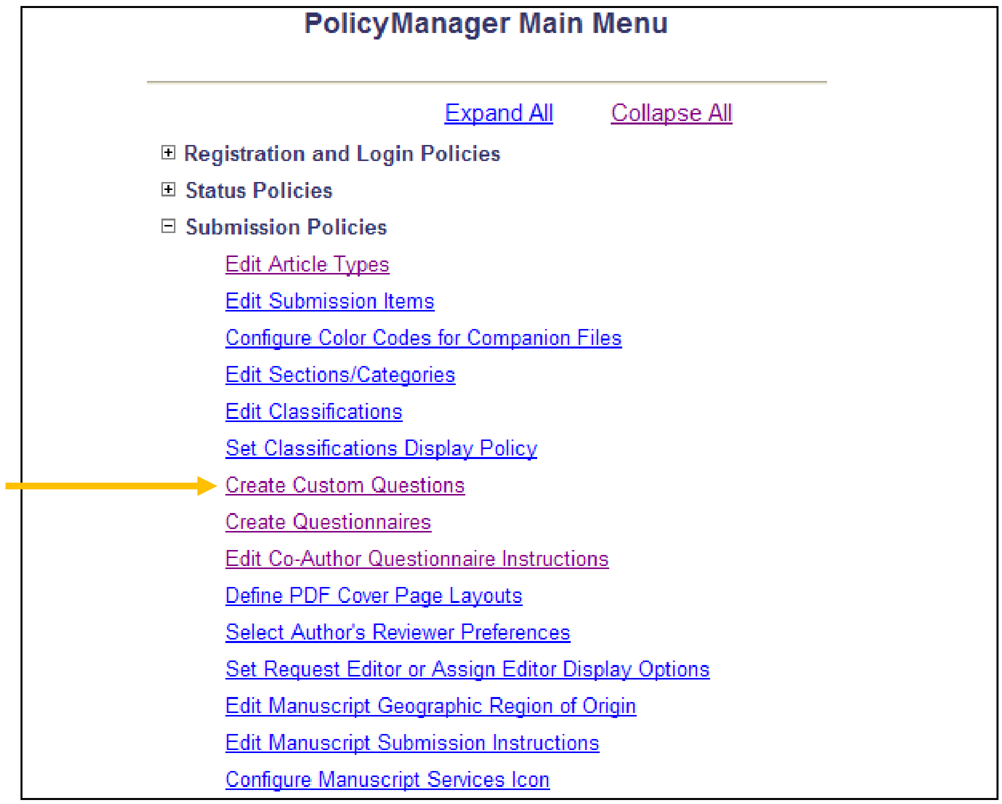
Character Count: 27

There are potential issues.

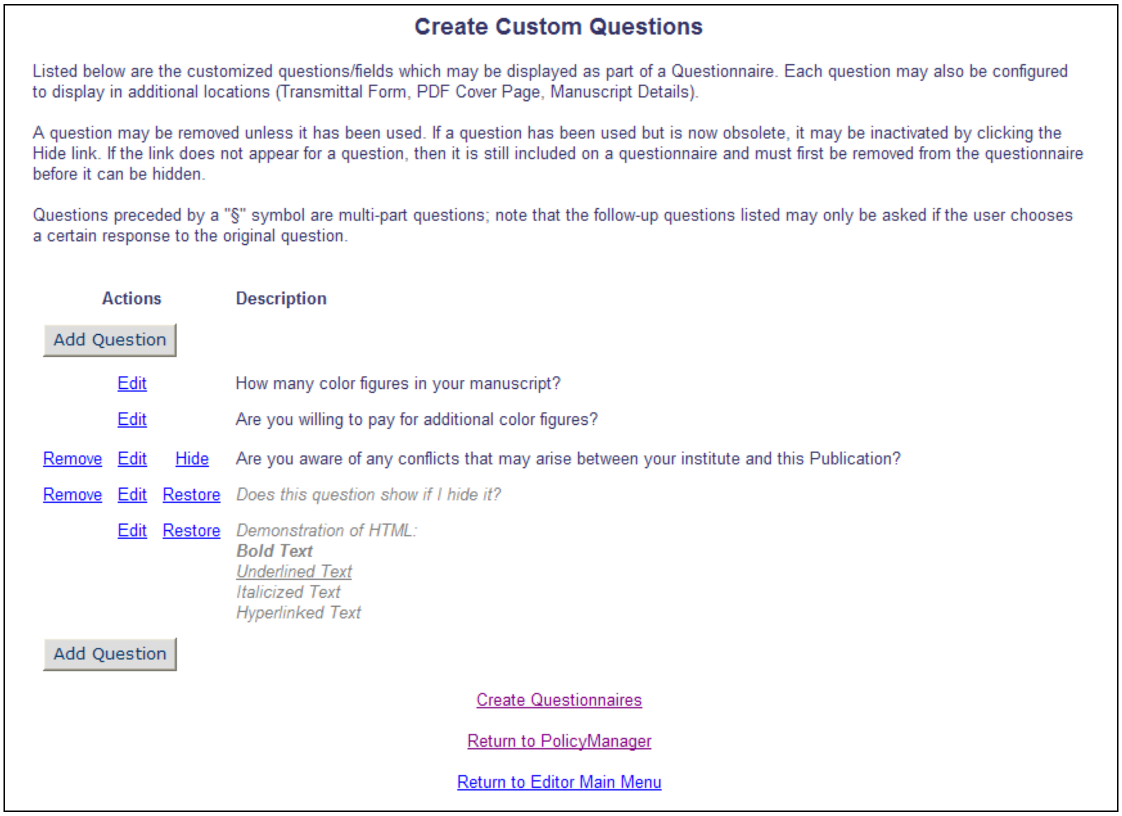
Limit 20000 characters

Cancel | Save and Close

TO CONFIGURE:
To use this new feature, new questions will need to be created. You may not add follow-up questions to any questions that have already been used for your publication. To add new questions that use the new Multi-part functionality, go to PolicyManager and click the Create Custom Questions link in the 'Submission Policies' section. You will be taken to an enhanced version of the *Create Custom Questions* page; this is the "master list" of Questions. These questions can be used for both Submission Questionnaires and Author Questionnaires (see the "Additional Information / Author Questionnaire Enhancements' section of these release notes for more information on Author and Submission Questionnaires).



On the *Create Custom Questions* page, click the 'Add Question' button to create a new Question in the 'master list'. NOTE: You may click the Edit link to modify the answers available on a list-type question or click the Remove link to remove a question that has not yet been presented an Author. You may also click the Hide link to hide a question that has already been used, but is not currently on a Questionnaire.

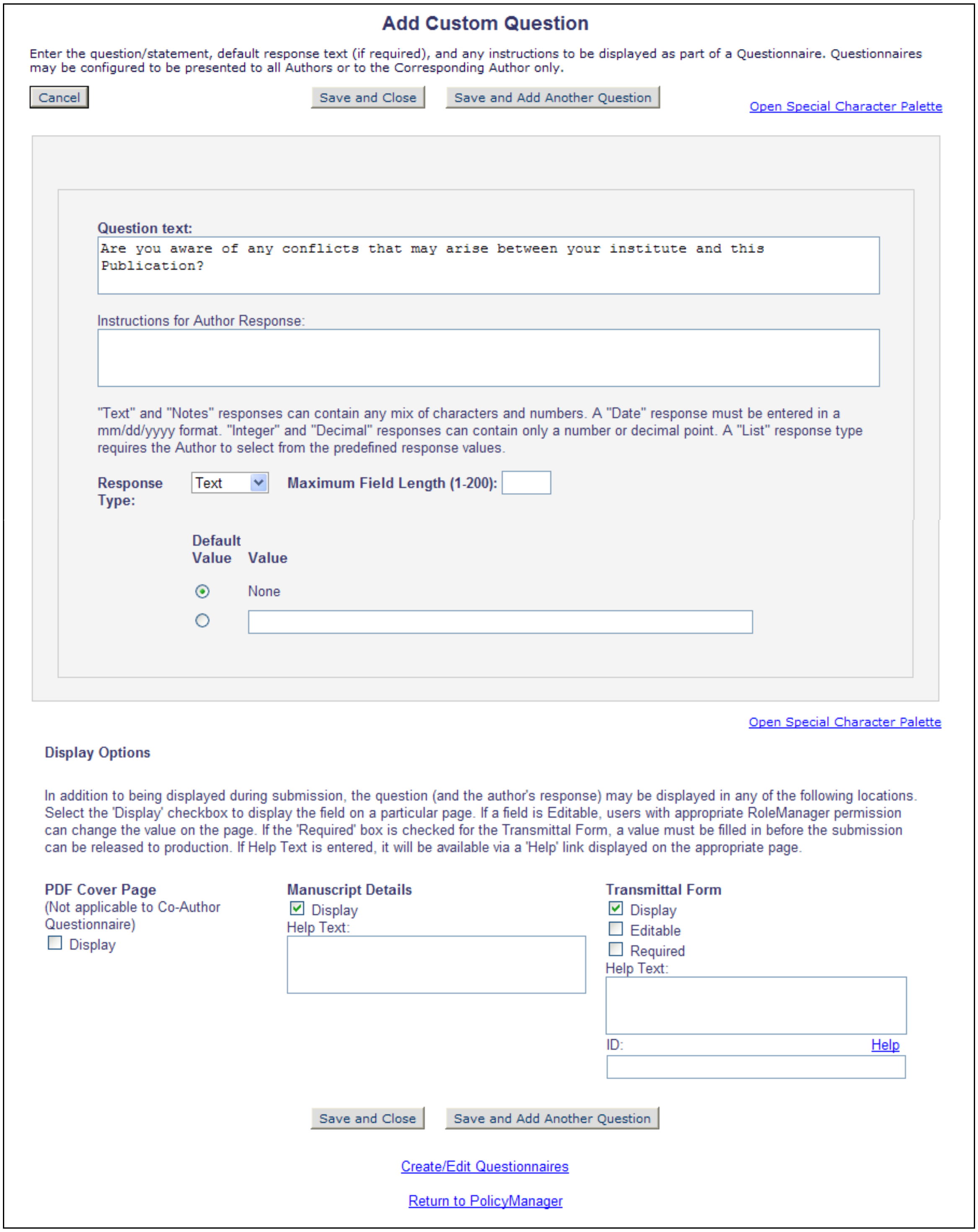


The *Add Custom Question* page layout is modified to assist in a clear line-up of Questions and subsequent Questions:

1. 'Question text' – This area is where the Question is entered. This is the text that will appear to the Author on the Questionnaire. Text is required in this field; a Question cannot be saved without entering at least one non-space character in this box.
2. 'Instructions for Author Response' – Text entered here is available to the Author by clicking the Instructions hyperlink next to the Question at the 'Additional Information' submission step or on the *Author Questionnaire* page.
3. 'Response Type' – This indicates how the Author is expected to respond to the Questions at the Additional Information step (i.e. Will he choose an option from a drop-down list? Does he have to enter a date? Can he enter text?). This drop-down list allows you to choose from one of the following options:
   - 'Text' (selected by default) – If this Response Type is selected, the Author response entered on the Additional Information step can contain any combination of characters and numbers. A maximum number of characters may be set from 1-200.
   - 'Date' – Author response must be entered in an 'mm/dd/yyyy' format. The calendar icon feature is displayed to provide a convenient way for the user to adhere to this format.
   - 'Integer' – Author response must be a number.
   - 'Decimal' – Author responses can contain only numbers and a decimal point.
   - 'Notes' – Author response may contain any combination of characters and numbers. This is just like 'Text', except the Author has a larger area in which to type. A maximum number of characters may be set from 1-20,000.

- ‘List’ – Author response requires the Author to select from a list of choices pre-configured by the Administrator. This is described further below.

4. The ‘Display Options’ section at the bottom of the page is where administrators determine where these Questions and Answers will display (when they have been configured on a Questionnaire and assigned to an Article Type). Questions and Answers may be configured for three areas:
    a. PDF Cover Page – Questions are not displayed by default on the PDF Cover Page. To display, select/check the ‘display’ box under this header. You must also select ‘Additional Information’ in the PDF Cover Page configuration for any question to display on the PDF Cover Page.
    b. Manuscript Details – Questions are displayed on the *Details* page by default. If you do not want the Question and response to display on the *Details* page, deselect/uncheck the ‘Display’ checkbox under this heading at the bottom of the page. If this Question is configured to display, you may also enter ‘Help’ text that is available via a Help link located next to the Question and Answer on the *Details* page.
    c. Transmittal Form – Questions are displayed on the *Transmittal Form* by default. To remove it from the *Transmittal Form*, uncheck/deselect the ‘Display’ checkbox under this heading. If the Question is marked as ‘Editable’, users with appropriate RoleManager permission can edit the value on the *Transmittal Form*. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, it will be available via a Help link on the *Transmittal Form*.



Add Custom Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented to all Authors or to the Corresponding Author only.

Cancel | Save and Close | Save and Add Another Question | Open Special Character Palette

Question text:

Are you aware of any conflicts that may arise between your institute and this Publication?

Instructions for Author Response:

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: Text **Maximum Field Length (1-200):**

Default Value	Value
(•)	None
( )	

Open Special Character Palette

Display Options

In addition to being displayed during submission, the question (and the author's response) may be displayed in any of the following locations. Select the 'Display' checkbox to display the field on a particular page. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

PDF Cover Page
(Not applicable to Co-Author Questionnaire)
☐ Display

Manuscript Details
☑ Display
Help Text:

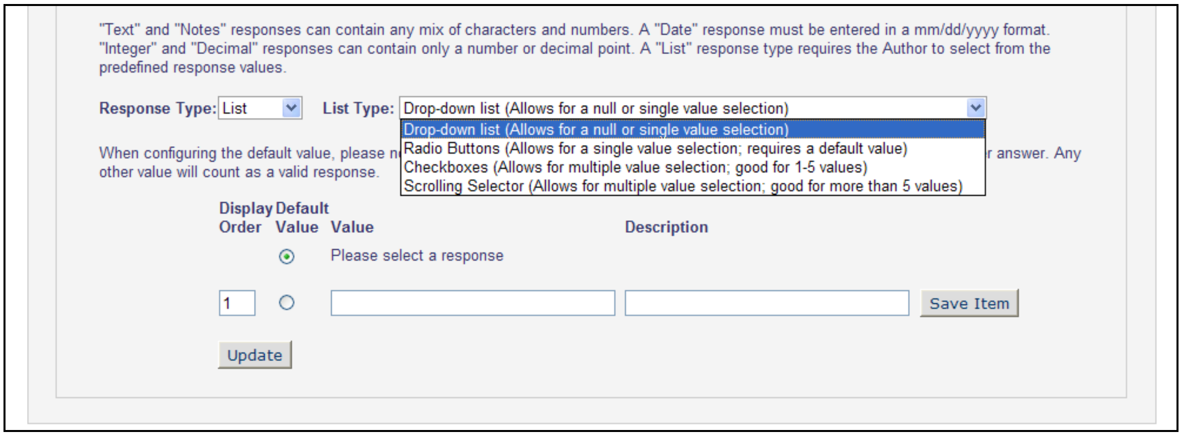
Transmittal Form
☑ Display
☐ Editable
☐ Required
Help Text:
ID: Help

Save and Close | Save and Add Another Question

Create/Edit Questionnaires

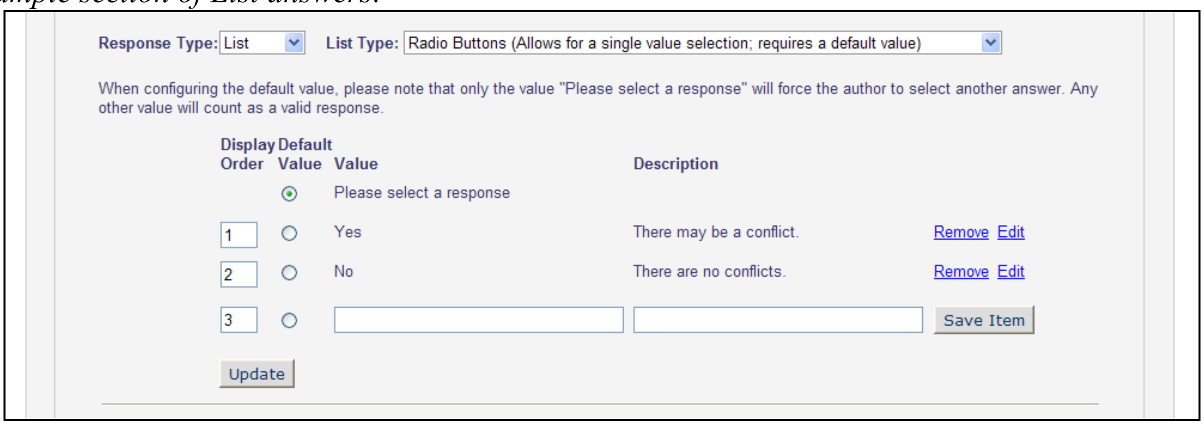
Return to PolicyManager

Selecting the 'List' option from the Response Type drop-down refreshes the page to display a 'List Type' drop-down with four Display options to specify how the Author is presented with the list of possible values at the *Additional Information* step or Co-Author Questionnaire.



When the 'List' Response Type option is selected, the page refreshes, allowing the administrator to customize the options available for Author responses directly on the page. You may select a Default value, and indicate the order in which the answer choices are displayed.

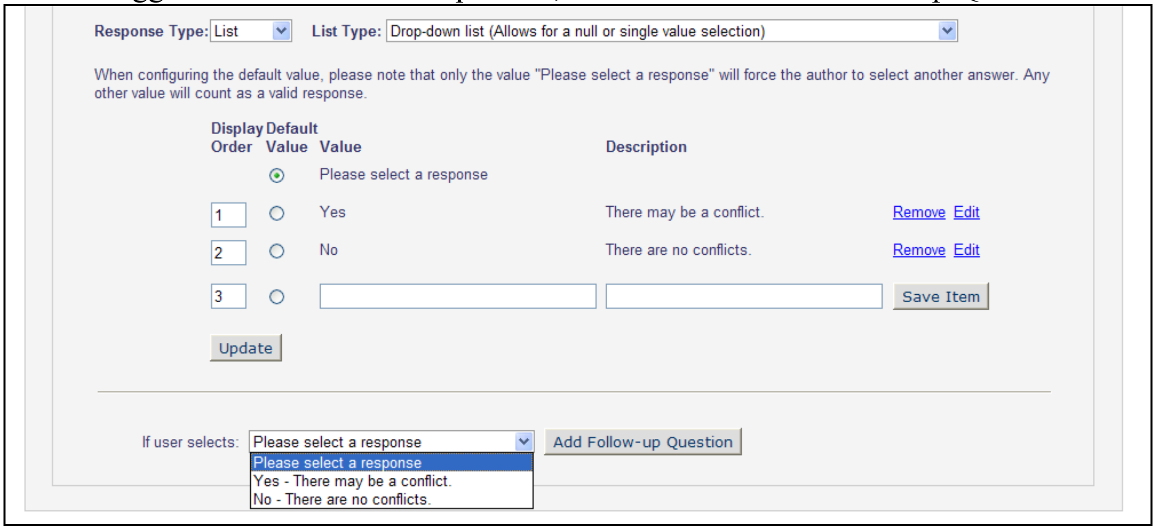
Sample section of List answers:



When the Response Type is 'List', new functionality is introduced in v10.0 to allow a Follow-up Question to be configured that depends on the response given by the Author. Below the 'Update' button (below the List Values), a section displays with the text 'If user selects:', and all configured List Options display. The way they display and function is dependent on the List Type selected.

1. 'Drop-down list (Allows for a null or single value selection)' – When this option is selected, the list displays as a Drop-Down in the lower portion of the page. Select the

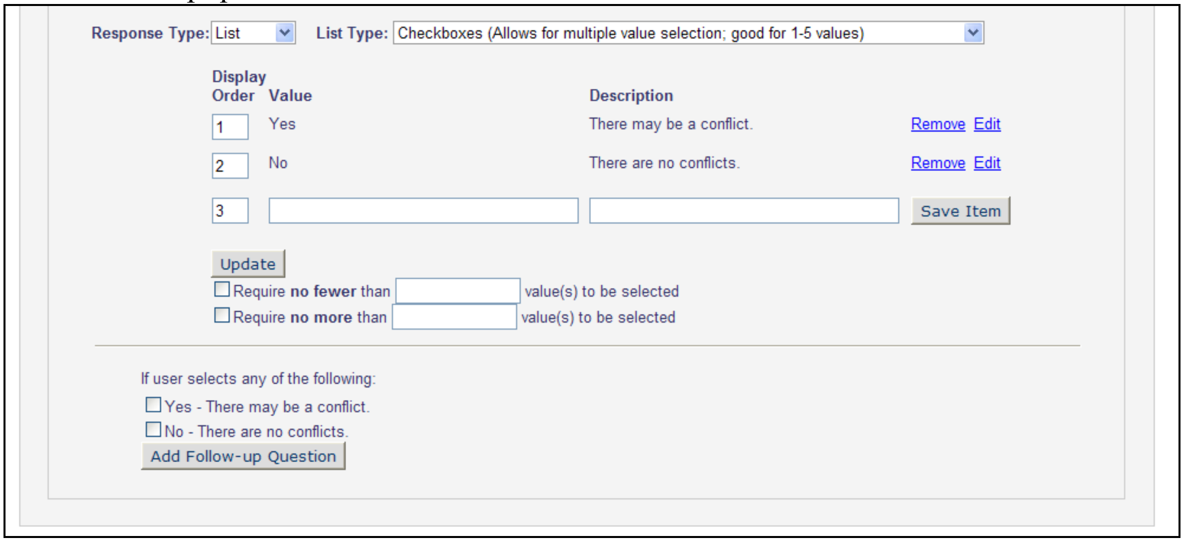
desired trigger answer from the drop-down, and click the 'Add Follow-up Question'.



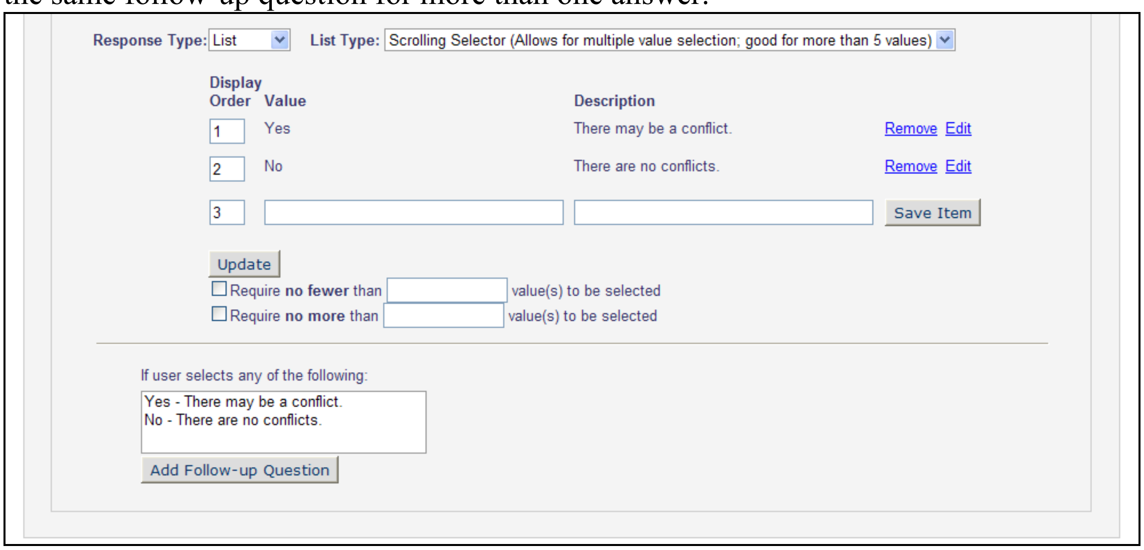
2. 'Radio Buttons (Allows for a single value selection; requires a default value)' – When this option is selected, the list displays as Radio Buttons in the configured order in the lower portion of the page. Select the Radio Button for the desired trigger answer, and click the 'Add Follow-up Question'.

3. 'Checkboxes (Allows for multiple value selection; good for 1-5 values)' – When this option is selected, the list displays as Check Box options in the configured order in the lower portion of the page. Check the box(es) for the desired trigger answer(s), and click the 'Add Follow-up Question'. You can select multiple checkbox options to use the

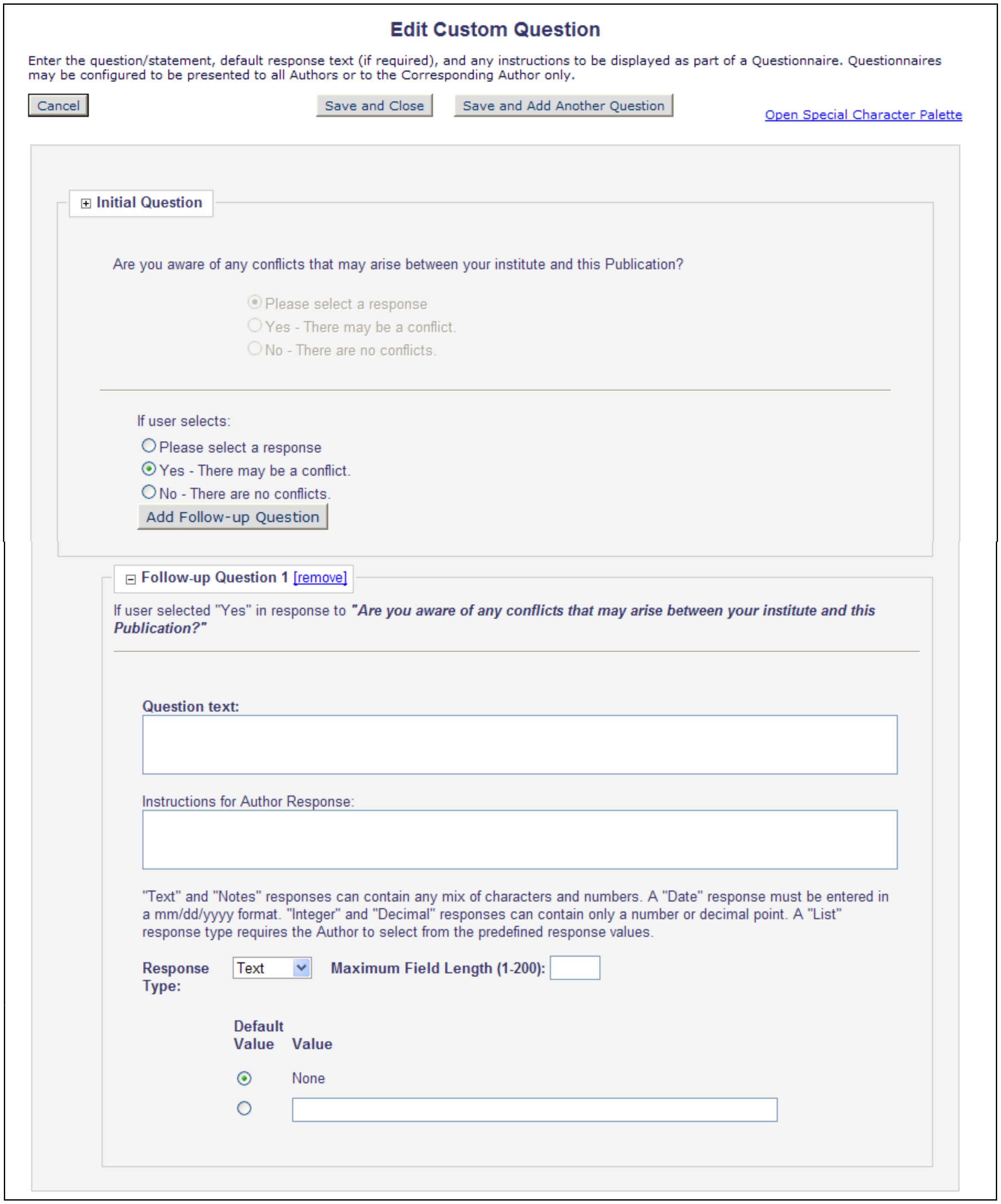
same follow-up question for more than one answer.



4. ‘Scrolling Selector (Allows for multiple value selection; good for more than 5 values)’ – When this option is selected, the list displays as the scrolling selector options in the configured order in the lower portion of the page. Select the desired trigger answer(s), and click the ‘Add Follow-up Question’. You can select multiple menu options to use the same follow-up question for more than one answer.

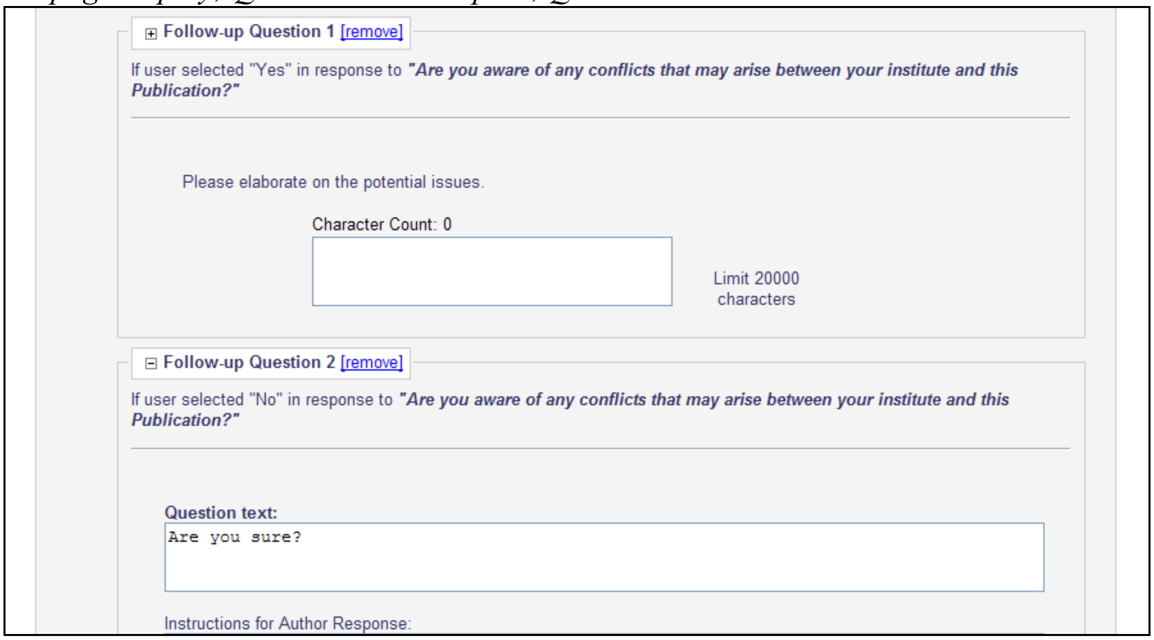


To create a Follow-up Question triggered by a response, select the Response for which the question should be triggered, and click the ‘Add Follow-up Question’ button. In the pictured example, you may wish to prompt the Author to elaborate on what conflicts may exist between the Author’s institute and the publication. To capture this, the example has set the list type to Radio Buttons. Then in the lower portion of the page, the answer of ‘Yes’ is selected, and the ‘Add Follow-up Question’ button is clicked. The page refreshes to ‘collapse’ the Initial Question and expand a Follow-up Question area. This is where the follow-up question is configured.



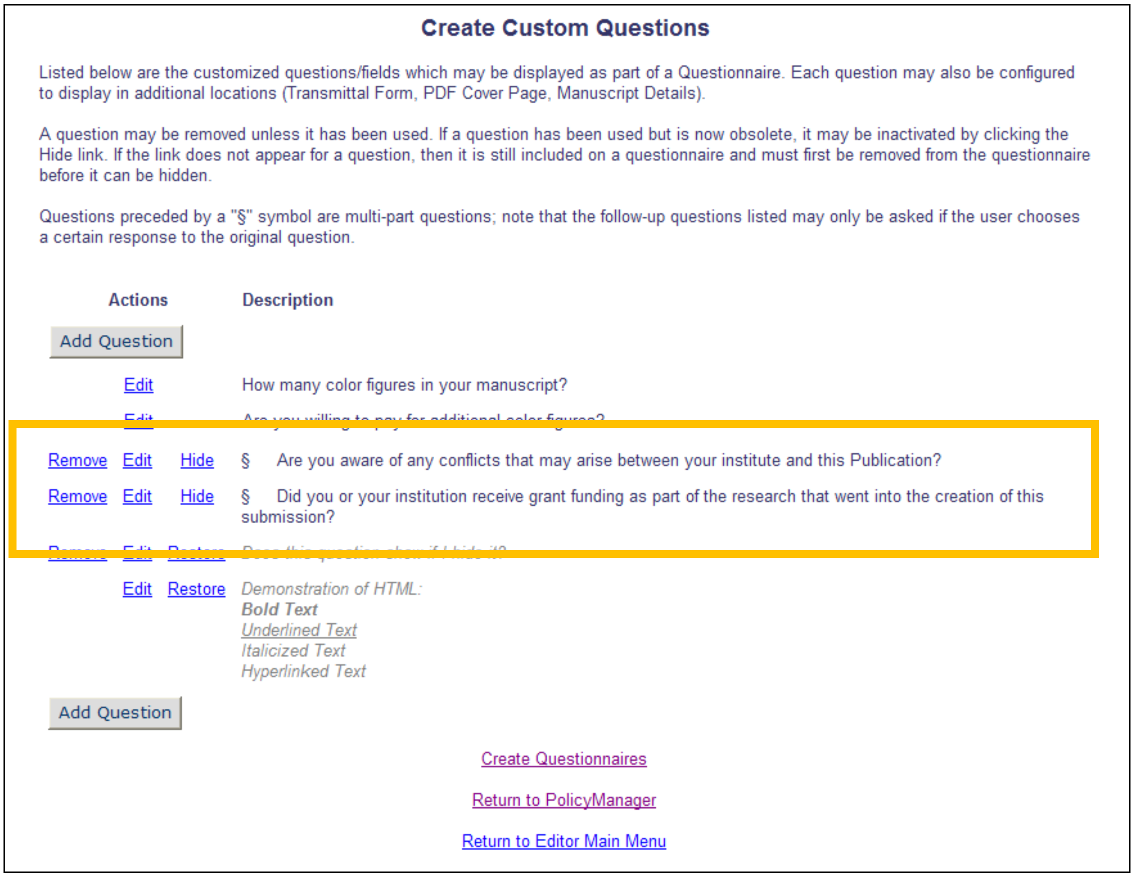
You may configure as many Follow-up questions as you like for each of the two Primary responses. To have a Follow-up for each answer, you would next click the Radio Button next to the 'No' answer and click the 'Add Follow-up Question' button. The second Follow-up Question (in this case, the Follow-up to "No", as opposed to the first Follow-up Question which is a Follow-up to "Yes") will appear below Follow-up Question 1, with Follow-up Question 1 collapsed. NOTE: When Questions are collapsed on this page, they display as they will be shown to the Author.

Partial page display; Question 1 is collapsed, Question 2 is below:



Publications may configure up to 3 levels of Questions (Primary, Follow-up to the Primary, Second Follow-up to the First Follow-up). You may configure multiple Follow-Up questions for 1 response. This may be useful in gathering Grant-related information. For example, you may ask the Author how many Grants were received as funding for the research. If the Author selects '3' from a list of options, you may configure 3 Follow-up Questions, and they may each ask 'To whom was the Grant paid'. This question may be configured with the following answers; 'You' and 'Your Institution'. A third level of questions may be configured triggered by one of those answers. An answer of 'You' may result in questions asking about the Grantor, the relationship between the Grantor and the Author, etc.

When the new multi-part questions are listed on configuration pages (such as the *Create Custom Questions* page), they are denoted with a section symbol (§) before the text of the question. The Initial Question is the one listed; when selected, all follow-on questions will also be included in the Questionnaire, appearing when the triggering answer is given by the Author.



Create Custom Questions

Listed below are the customized questions/fields which may be displayed as part of a Questionnaire. Each question may also be configured to display in additional locations (Transmittal Form, PDF Cover Page, Manuscript Details).

A question may be removed unless it has been used. If a question has been used but is now obsolete, it may be inactivated by clicking the Hide link. If the link does not appear for a question, then it is still included on a questionnaire and must first be removed from the questionnaire before it can be hidden.

Questions preceded by a "§" symbol are multi-part questions; note that the follow-up questions listed may only be asked if the user chooses a certain response to the original question.

Actions	Description
Add Question	
Edit	How many color figures in your manuscript?
Edit	Are you willing to pay for additional color figures?
Remove Edit Hide	§ Are you aware of any conflicts that may arise between your institute and this Publication?
Remove Edit Hide	§ Did you or your institution receive grant funding as part of the research that went into the creation of this submission?
Remove Edit Restore	*Does this question show if I hide it?*
Edit Restore	*Demonstration of HTML:* ***Bold Text*** *Underlined Text* *Italicized Text* *Hyperlinked Text*
Add Question	

Create Questionnaires

Return to PolicyManager

Return to Editor Main Menu

Additional Information / Author Questionnaire Enhancements

In EM v9.2, Publications may configure an 'Author Questionnaire' comprised of any number of Questions from a 'master list' of Custom Submission Questions. These questions may be used to gather Submission Information (such as questions on research) or Author Information (such as conflict of interest questions, etc.). When configured for a selected Article Type, the Corresponding Author is presented with the Author Questionnaire on the 'Additional Information' step of the Submit New Manuscript process.

New in EM v10.0, Publications can now configure an Article Type so that the questions associated with two different questionnaires are presented to the Corresponding Author during the 'Additional Information' step of the submission process; one questionnaire (a 'Submission Questionnaire') may contain submission-related questions that are only presented to the Corresponding Author during the submission process, and a second questionnaire (an 'Author Questionnaire') may contain author-related questions that are presented to the Corresponding Author during the submission process and may also be presented to Co-Authors during the verification process (see the "Co-Author Questionnaires" section of these Release Notes for more information). The Corresponding Author will see all questions on the existing Additional Information page as if they are part of a single questionnaire.

NOTE: On upgrade, any existing Questionnaire configured for an Article Type is set as the 'Submission Questionnaire' on the *Edit Article Type* page.

When an Article Type is configured with Questionnaires of both kinds (Submission and Author), all questions are displayed to the Corresponding Author on the Additional Information step. Questions associated with the questionnaire configured for the 'Designate Submission Questionnaire' option are displayed first, in the order defined on the Questionnaire, followed by questions associated with the questionnaire configured for the 'Designate Author Questionnaire' option.

NOTE: There is no visual separation of the questions pulled from the 'Submission' and 'Author' Questionnaires. They are displayed to the Corresponding Author as if they are part of a single questionnaire.

TO CONFIGURE:
To configure Custom Questions for use on the Author Questionnaire, go to PolicyManager and click the Create Custom Questions link in the 'Submission Policies' section (note, this link is re-named in v10.0). For more information on the enhanced Custom Question functionality, go to the "Multi-part Custom Questions for Authors and Co-Authors" section of these release notes.

To create a new Questionnaire, or edit an existing Questionnaire, go to PolicyManager and click the Create Questionnaires link in the 'Submission Policies' section (note, this link is re-named in v10.0), or click the Create Questionnaires link on the *Create Custom Questions* page.

To assign these separate questionnaires for an Article Type, go to Edit Article Type in PolicyManager, and Edit the desired Article Type. Scroll down the page to the 'Article Type Parameters' section and select the desired Questionnaires in the 'Set "Additional Information" Preferences' section. The Submission Questionnaire will be displayed on the 'Additional Information' step first, with the Author Questionnaire displayed second. NOTE: If configured, the Author Questionnaire will also be displayed to the Co-Authors of a submission (see the 'Co-Author Questionnaires' section of these Release Notes for more information).

Article Type Parameters	New Submission	Revised Submission	
Set Secondary "Full Title" Preferences:	Hidden	Hidden	
Set "Short Title" Preferences:	Optional	Hidden	
Set Secondary "Short Title" Preferences:	Hidden	Hidden	
Set "Select Section/Category" Preferences:	Optional	Optional	
Set "Submit Abstract" Preferences:	Optional	Hidden	
Set Secondary "Submit Abstract" Preferences:	Hidden	Hidden	
Set "Enter Keywords" Preferences:	Optional	Optional	
Set "Enter Secondary Keywords" Preferences:	Hidden	Hidden	
Set "Select Classifications" Preferences:	Required	Optional	*You may set Minimum and/or Maximum limits for the 'Number of Classifications' under Field Size Limitations below.*
Set "Additional Information" Preferences:			
Designate Submission Questionnaire:	Demonstration Questionnaire	Demonstration Questionnaire	
Designate Author Questionnaire:	Author Questionnaire	Author Questionnaire	
Set "Enter Comments" Preferences:	Optional	Optional	
Set "Suggest Reviewers" Preferences:	Hidden	Hidden	

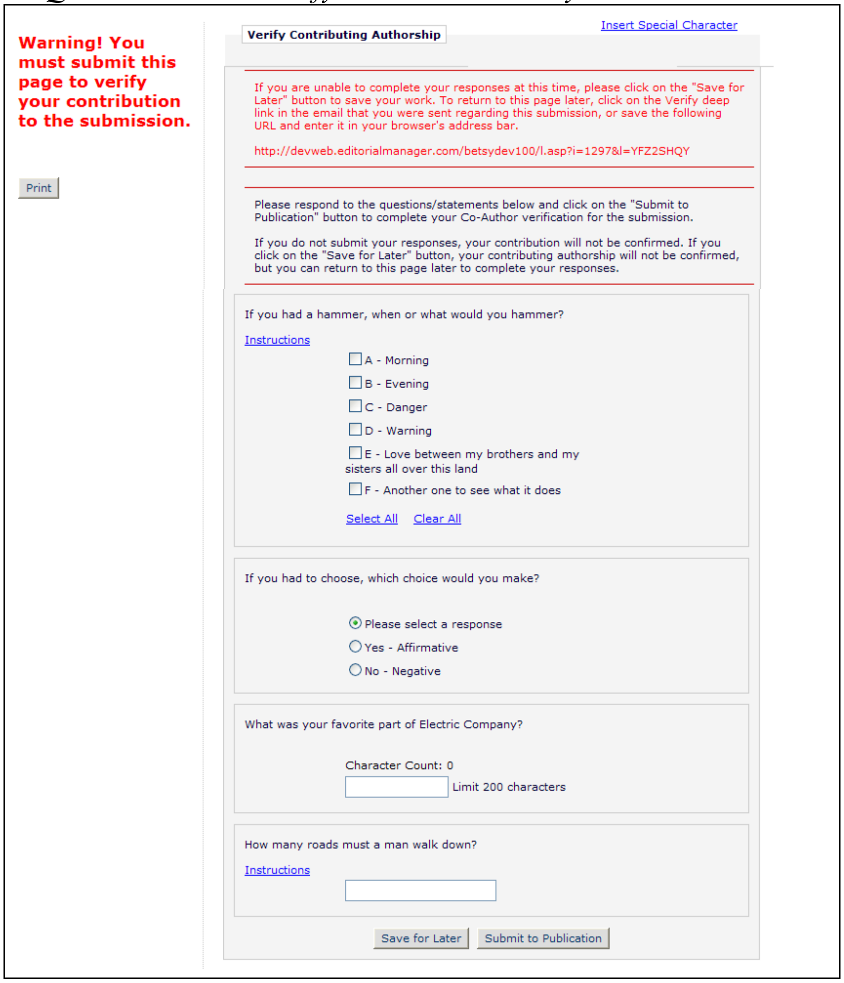
Co-Author Questionnaires

In EM v9.2, publications may configure Article Types to request that Co-Authors listed on a submission by the Corresponding Author verify that they are Co-Authors on that submission. These Co-Authors Verify or Decline by clicking deep links sent in a confirmation e-mail.

New in EM v10.0, Publications may choose to ask Co-Authors to complete an Author Questionnaire, similar to that displayed to the Corresponding Author on the 'Additional Information' step of a New or Revised Submission. When an Article Type is configured to require Co-Authors to verify their contribution to a submission, they are sent an e-mail containing two deep links: One to decline and one to confirm. If the Co-Author clicks on the deep link to verify, and the Article Type of the submission has been configured to Display an Author Questionnaire to Co-Authors, then the Co-Author is now brought to a new page containing the configured Author Questionnaire.

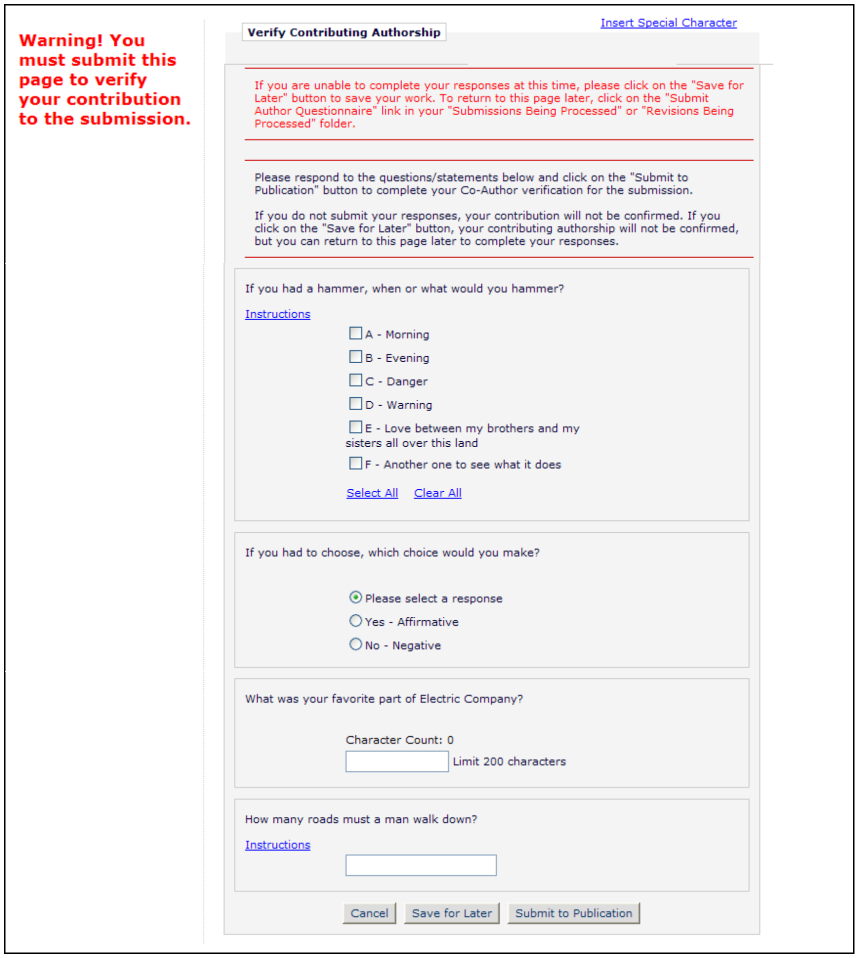
The Co-Author must answer any required questions and click the 'Submit to Publication' button to complete their verification. He may click the 'Save for Later' button to complete the Questionnaire at a later time, though he must use the link displayed in the Instructional Text on the page, or click the 'Confirm' deep link in the e-mail to return to the page. The Co-Author may also use the 'Print' button on the left side of the page to print a copy of the Questionnaire for reference.

Sample Co-Author Questionnaire – Verify Contribution Only:



When an Article Type is configured to require Co-Authors to verify their contribution to a submission and register in the system (or log in using an existing registration), they are sent an e-mail containing two deep links: one to decline and one to confirm. If the Co-Author clicks on the deep link to verify and successfully logs into the system (either using an existing registration, or by completing a new registration), and the Article Type of the submission has been configured to display an Author Questionnaire to Co-Authors, then the Author is brought to a new page containing the configured Author Questionnaire.

The Co-Author must answer any required questions and click the 'Submit to Publication' button to complete their verification. She may click either the 'Cancel' or the 'Save for Later' button to complete the Questionnaire at a later time. Clicking either of these buttons will not complete the Co-Author confirmation process, but will place the submission in the Co-Author's *Submissions Being Processed* or *Revisions Being Processed* folder (depending on if this is a new submission or a revision).



Warning! You must submit this page to verify your contribution to the submission.

Verify Contributing Authorship

Insert Special Character

If you are unable to complete your responses at this time, please click on the "Save for Later" button to save your work. To return to this page later, click on the "Submit Author Questionnaire" link in your "Submissions Being Processed" or "Revisions Being Processed" folder.

Please respond to the questions/statements below and click on the "Submit to Publication" button to complete your Co-Author verification for the submission.

If you do not submit your responses, your contribution will not be confirmed. If you click on the "Save for Later" button, your contributing authorship will not be confirmed, but you can return to this page later to complete your responses.

If you had a hammer, when or what would you hammer?

Instructions

- A - Morning
- B - Evening
- C - Danger
- D - Warning
- E - Love between my brothers and my sisters all over this land
- F - Another one to see what it does

Select All Clear All

If you had to choose, which choice would you make?

- Please select a response
- Yes - Affirmative
- No - Negative

What was your favorite part of Electric Company?

Character Count: 0

Limit 200 characters

How many roads must a man walk down?

Instructions

Cancel | Save for Later | Submit to Publication

If the Co-Author doesn't complete the Questionnaire upon first logging in she must either go to the appropriate folder and click on the new Submit Author Questionnaire link for that submission, or click the 'Confirm' deep link in the e-mail to return to the *Co-Author Questionnaire* page.

Submissions Being Processed for Author Hermione Grainger

Page: 1 of 1 (2 total submissions) Display 10 results per page.

Action	Manuscript Number	Title	Authorship	Initial Date Submitted	Status Date	Current Status
View Submission Submit Author Questionnaire		Testing Co-Author Registration Questionnaire	Other Author	Nov 1 2012 10:48AM	Nov 1 2012 10:48AM	Received by Journal
View Submission Author Status Correspondence Send E-mail	BETSYDEV92-D-12-00009	Testing the requirement of Other Authors to Register 1/5/10	Corresponding Author	Jan 5 2010 2:21PM	Sep 10 2012 3:48PM	Reviewer invited

Page: 1 of 1 (2 total submissions) Display 10 results per page.

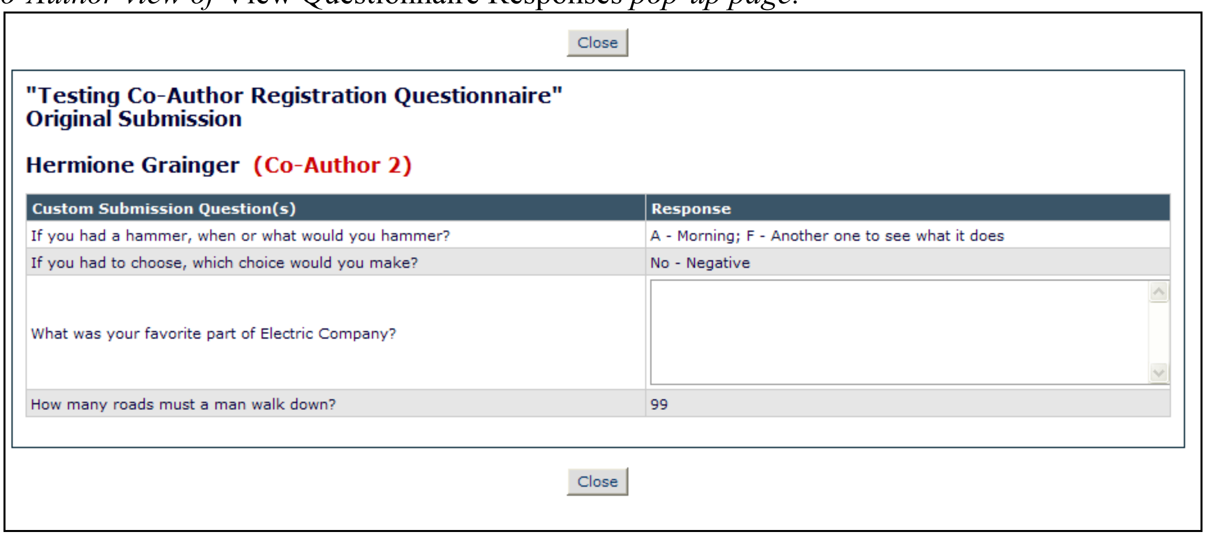
<< Author Main Menu

When Co-Authors have completed the Author Questionnaire as part of their verification process, then these responses can be accessed from a number of places in the system by users with proper permission.

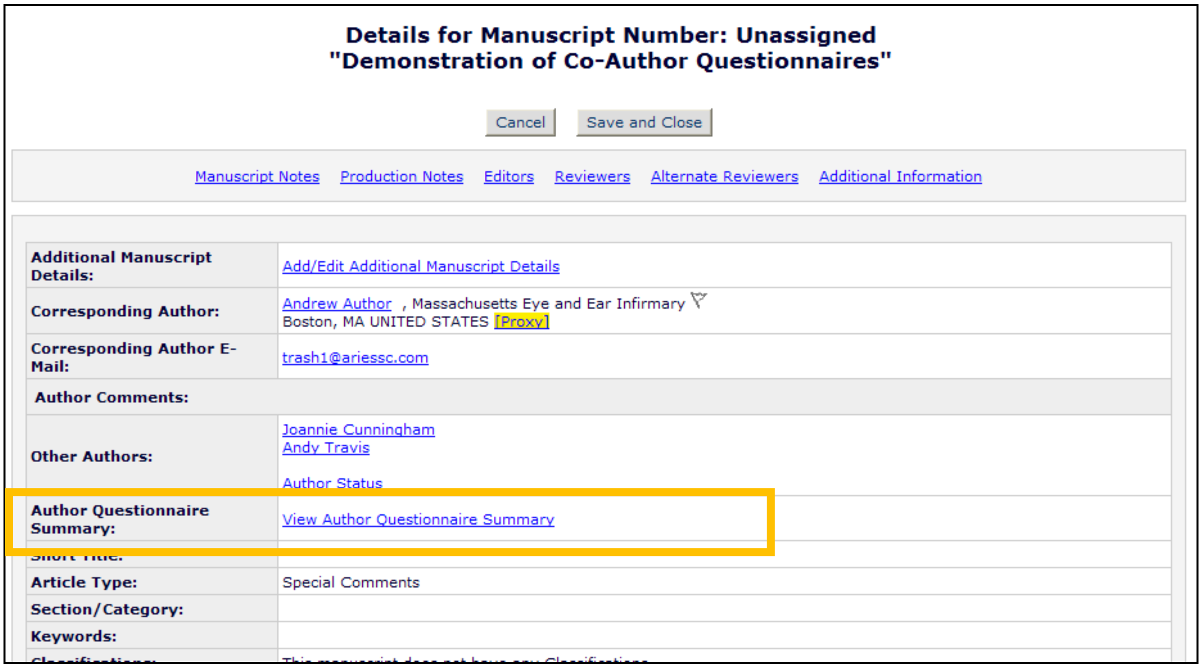
Co-Authors who have verified their contribution through registration may view their own answers by clicking the new View Questionnaire Responses link in the *Submissions Being Processed* or *Revisions Being Processed* folder.

The Co-Author may view their responses on the *View Questionnaire Responses* page, but they may not edit their responses. If a Co-Author wishes to edit their responses, they must contact the Editorial Office and request their answers be changed, or have their confirmation status reset. NOTE: Resetting the confirmation status will clear out *all* answers from this Co-Author.

Co-Author view of View Questionnaire Responses *pop-up page:*



For Editors, a new section appears on the default *Editorial Details* page when a submission has Co-Authors, the Article Type is configured to require either Co-Author verification or Co-Author verification and registration, and an Author Questionnaire is configured for either the Corresponding Author or Co-Authors. This section, labeled "Author Questionnaire Summary", contains a View Author Questionnaire Summary link.



Clicking this link opens a new *Author Questionnaire Summary* page, where the user can see all Authors (Corresponding and Co-Authors) who have answered an Author Questionnaire. The questions are displayed in a grid containing all Author Questions and the associated Responses for each Author.

Author Questionnaire Summary
Manuscript Number: SALLYTEST90-D-11-00039
"More Co-Author Testing"

Close

Expand All / Collapse All

Ann Author (Corresponding Author)	Stephen Author (Co-Author)	Sandy Author (Co-Author)	Arthur Author (Co-Author)	George Jetson (Co-Author)
Please indicate the source of funding for your research.				
NIH	NIH	My Institution	This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters. Lengthy responses have (more...) and (less...) links to make them more readable. This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters. Lengthy responses have (more...) and (less...) links to make them more readable. This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters. This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters. Lengthy responses have (more...) and (less...) links to make them more readable. This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters. Lengthy responses have (more...) and (less...) links to make them more readable. This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters (less...)	Independent funding organization.
Please select a presentation date.				
6/18/2010	6/18/2010	6/19/2010	*(No Response)*	7/04/2011
What is the date of your anniversary?				
6/01/2004	6/25/1984	1/31/1991	1/1/2011	1/1/2011
Is this a tricky question?				
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta nobis eleifend (more...)	**Yes:** This is an example of a 'Yes/No/Text' response type. The additional response text is triggered by the 'Yes' response. The 'Yes' is displayed in bold text.	No	No	**Yes:** I think it is tricky.

Close

If a Question is not presented to a particular Author (if an Author is added on Revision, for example, and the Author Questionnaire is different), the 'response' area is shaded with dark gray.

Author Questionnaire Summary
Manuscript Number: SALLYTEST90-D-11-00039
"More Co-Author Testing"

Close

Expand All / Collapse All

Ann Author (Corresponding Author)	Stephen Author (Co-Author)	Sandy Author (Co-Author)	Arthur Author (Co-Author)	New Author (replaced George Jetson) (Co-Author)
Please indicate the source of funding for your research. (NOTE: This question does not appear on the Author Questionnaire configured for Revisions.)				
NIH	NIH	My Institution	This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters. Lengthy responses have (more...) and (less...) links to make them more readable. This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters. Lengthy responses have (more...) and (less...) links to make them more readable. This Author could have a lengthy response. The 'Expand All' and 'Collapse All' links are used to display responses of more than 500 characters (more...)	
Please select a presentation date.				
6/18/2010	6/18/2010	6/19/2010	*(No Response)*	7/14/2011
What is the date of your anniversary?				
6/01/2004	6/25/1984	1/31/1991	1/1/2011	1/1/2012
Is this a tricky question?				
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta nobis eleifend (more...)	**Yes:** This is an example of a 'Yes/No/Text' response type. The additional response text is triggered by the 'Yes' response. The 'Yes' is displayed in bold text.	No	No	**Yes:** This is hard to understand.
This question is part of the questionnaire configured for Revisions.				
This is the Corresponding Author's response.				This is the response from a Co-Author who was added when the Corresponding Author submitted the R1. A different questionnaire is configured for the 'Designate Author Questionnaire' item on Revision.
This is an example of a multiple choice question response that was only presented for the R1.				
• Option 1 • Option 2 • Option 3				• Option 3 • Option 4

Close

If any responses are more than 500 characters, then (more…)/(less…) links display in that cell, allowing the answer to be expanded. Additionally, Expand All / Collapse All links are available above the grid to expand or collapse all answers greater than 500 characters.

Both the new View Questionnaire Responses and View Author Questionnaire Summary links are available on the *Author Details* page for Editors with 'Manager Other Authors' permission enabled. See the 'Enhancements for Managing Other Authors' section of these Release Notes for more information on the *Author Details* page enhancements.

When an Editor with 'Manage Other Authors' permission enabled clicks on an individual Co-Author's View Questionnaire Responses link, he is brought to the *View Questionnaire Responses* pop-up page, but he has two additional options on this page that the Co-Author does not have:

- Edit Other Author Responses – This allows the Editor to edit the responses entered by the Co-Author. The Editor is warned that editing responses will completely overwrite the prior answers submitted.
- View Author Details – This opens the existing *View Author Details* pop-up

Close

"Demonstration of Co-Author Questionnaires"
Original Submission

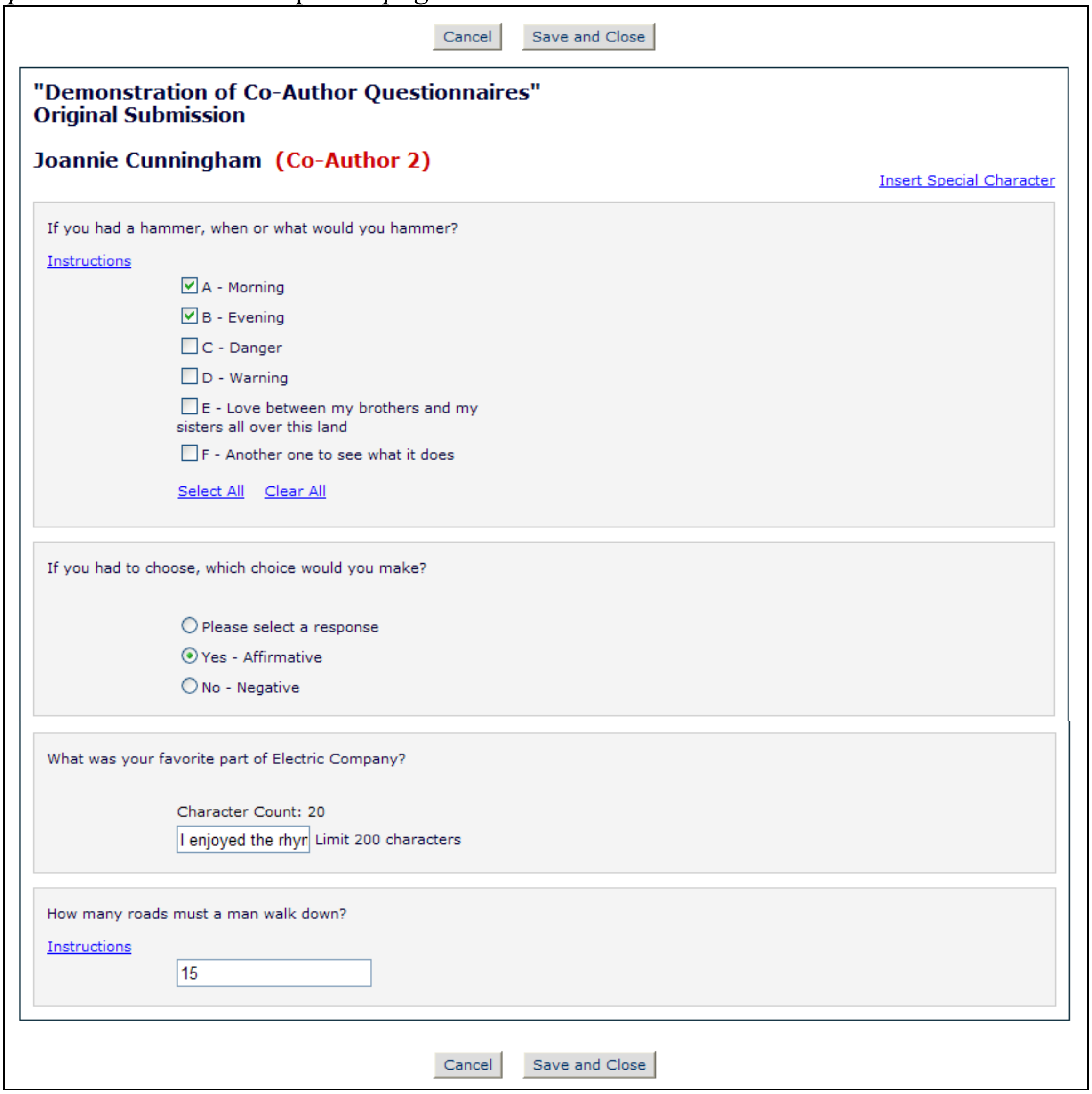
Joannie Cunningham (Co-Author 2)
Edit Other Author Responses

Custom Submission Question(s)	Response
If you had a hammer, when or what would you hammer?	A - Morning; B - Evening
If you had to choose, which choice would you make?	Yes - Affirmative
What was your favorite part of Electric Company?	I enjoyed the rhymes
How many roads must a man walk down?	15

View Author Details

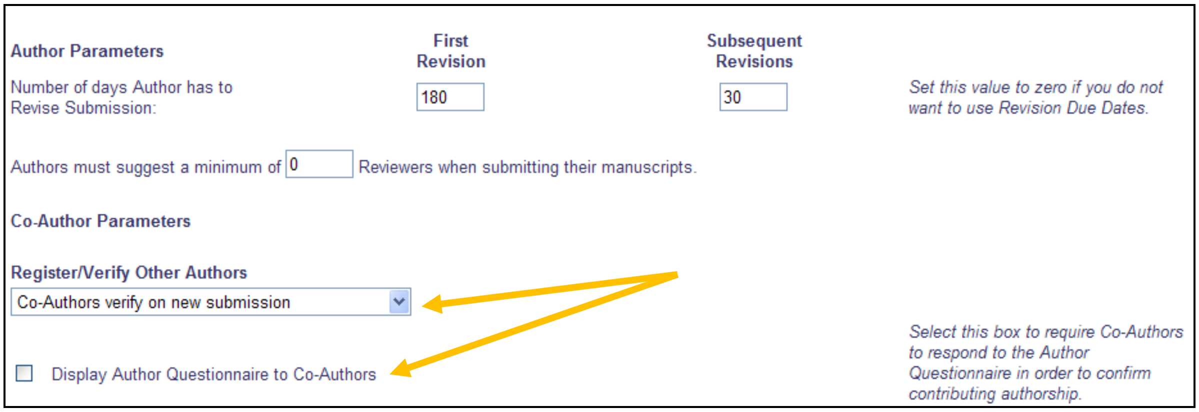
Close

Sample Edit Co-Author Responses *page:*

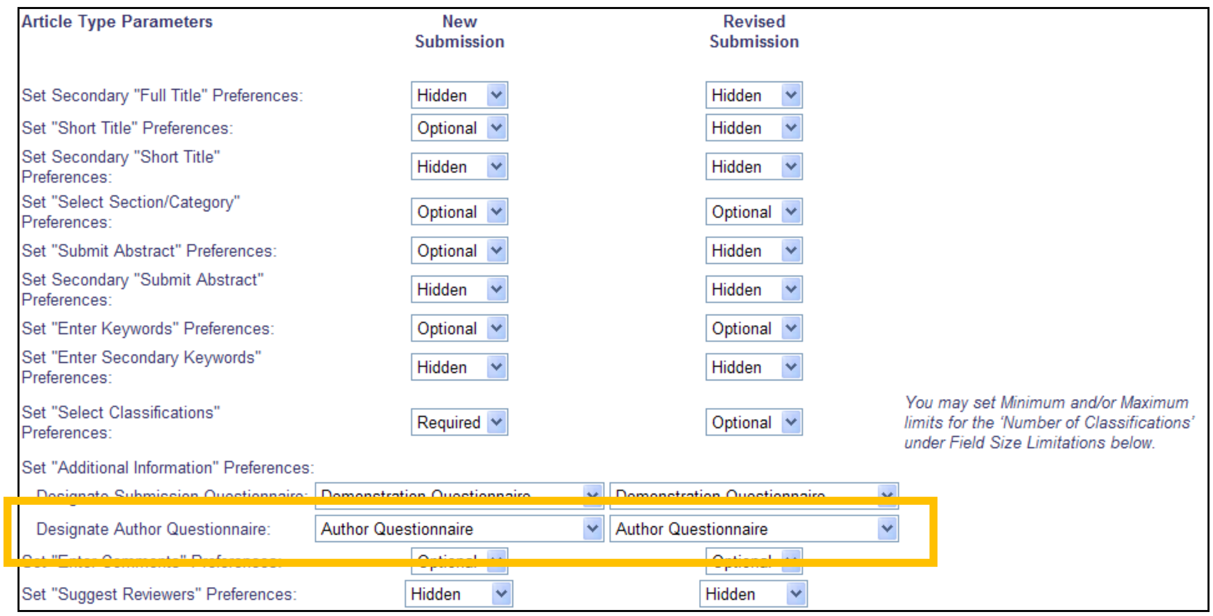


TO CONFIGURE:

To display an 'Author Questionnaire' to all Other Authors (Co-Authors) on a submission, go to PolicyManager, *Edit Article Type*, and edit an existing Article Type or Add a new Article Type. On the *Edit Article Type* page, scroll to the new 'Co-Author Parameters' section, and select an option other than "Corresponding Author Only" from the drop-down. When one of these other options is selected, the new 'Display Author Questionnaire to Co-Authors' checkbox is available for selection.

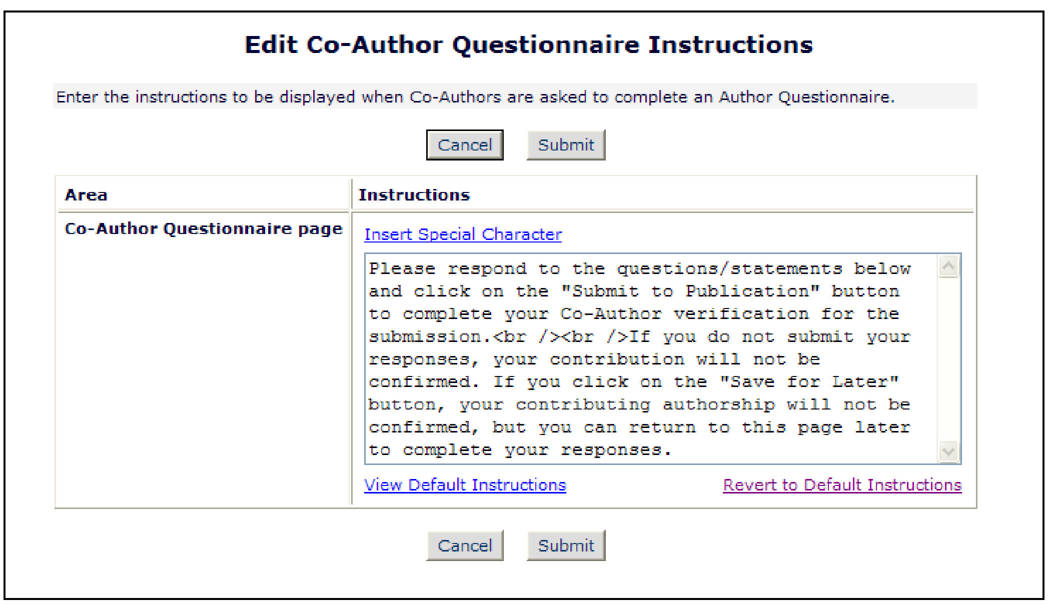


Scroll down the page to the 'Article Type Parameters' section and select the desired Questionnaire in the 'Designate Author Questionnaire' section. The Author Questionnaire will be displayed to the Corresponding Author as well as all Co-Authors of a submission.



To configure instructions that will display to Co-Authors when they are presented with the Author Questionnaire, go to PolicyManager, and click the new Edit Co-Author Questionnaire Instructions link.

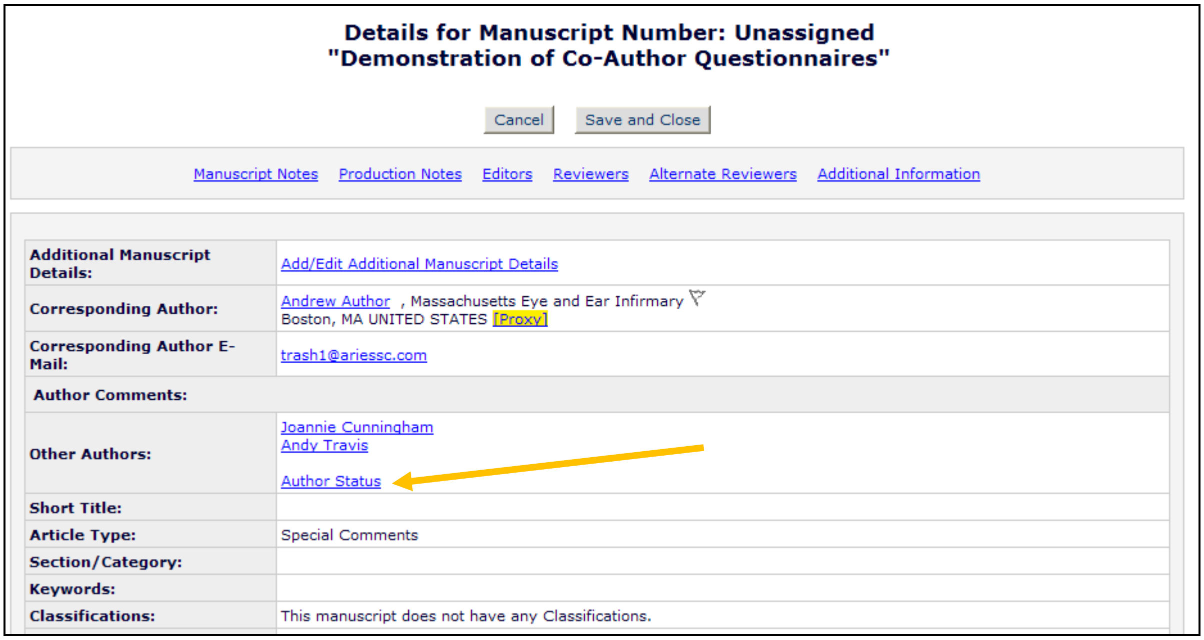
On upgrade, default text is entered into the 'Instructions' column on the *Edit Co-Author Questionnaire Instructions* page. Administrators may enter any custom text desired and save by clicking the 'Submit' button. Use the Revert to Default Instructions link to return to the default instructions.



Enhancements for Managing Other Authors

In EM v9.2, publications may configure Article Types to request Other (Co-) Authors on a submission to verify or decline their contribution to the submission. Editors (with proper permission) may view the Other Author status from *Details* and from *Technical Check* by clicking the Other Author Status link. The link displays for submissions where the Article Type has been configured to request Other Authors to register and/or verify their contribution to a submission and where there is at least one Other Author associated with the submission.

New in EM v10.0, this link is renamed Author Status, and the Other Author Details page now shows more information about all Authors of a submission.



The *Other Author Details* page is renamed *Author Details* and now shows Corresponding Author information as well as the Other (Co-) Author information. Editors may click the Author Status link from *Details* or *Technical Check* at any point in the process to see the current status of any Co-Authors of a submission.

Sample Author Details *page; Editors without 'Manage Other Authors' permission enabled:*

Author Details for Manuscript Number: SALLYTEST90-D-11-00039
"More Co-Author Testing"

Close

Corresponding Author Status

Order	Author Name	E-mail Address	Academic Degree(s)	Affiliation
2	Ann Author	Ann@ariessys.com	PhD	Columbia University

Other Author Status

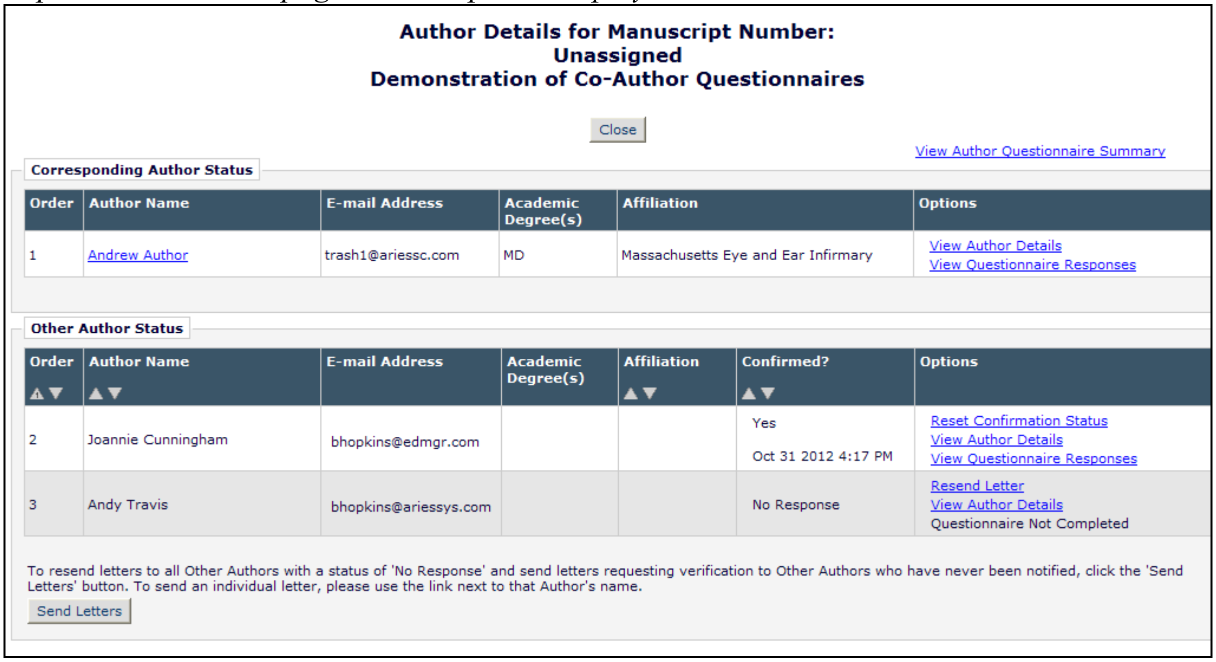
Order ▲▼	Author Name ▲▼	E-mail Address	Academic Degree(s)	Affiliation ▲▼	Confirmed? ▲▼
1	Stephen Author	Stephen@duke.edu	PhD	Duke University	Yes (Registered) Nov 11, 2011
3	Sandy Author	sandy@hmc.edu	MD	Harvey Mudd College	**Declined:** Nov 11, 2011
4	Arthur Author	AAuthor@BC.edu	MD	Boston College	No Response
5	Angie Jolie	Angie@Dartmouth.edu	PhD	Dartmouth College	Confirmation Not Requested
6	Blake Stephens	BlakeS@UCLA.edu	PhD	UCLA	Partial Questionnaire Saved

Close

For Editors with 'Manage Other Authors' permission enabled, the *Author Details* page is now modified in the following ways.

- The existing Action links are now located under a column heading of 'Options'.
- The Other Author's name in the 'Author Name' column is no longer a link to the *View Author Detail* page; instead a new View Author Details link is available in the 'Options' column in all cases (not just when a Co-Author is registered).
- When Authors have been asked to complete an Author Questionnaire, the Author's responses can be seen by clicking the new View Questionnaire Responses link in the 'Options' column.
- The remaining options are still available in the 'Options' column, depending on the status of the confirmation:
  - Reset Confirmation Status – NOTE: If Co-Author Questionnaires are in use, resetting a confirmation status will clear out ALL previous responses; the Co-Author will be asked to complete the Author Questionnaire again.
  - Resend Letter
  - Request Confirmation

Sample Author Details *page; not all options displayed here:*



Author Details for Manuscript Number:
Unassigned
Demonstration of Co-Author Questionnaires

Close

View Author Questionnaire Summary

Corresponding Author Status

Order	Author Name	E-mail Address	Academic Degree(s)	Affiliation	Options
1	Andrew Author	trash1@ariessc.com	MD	Massachusetts Eye and Ear Infirmary	View Author Details View Questionnaire Responses

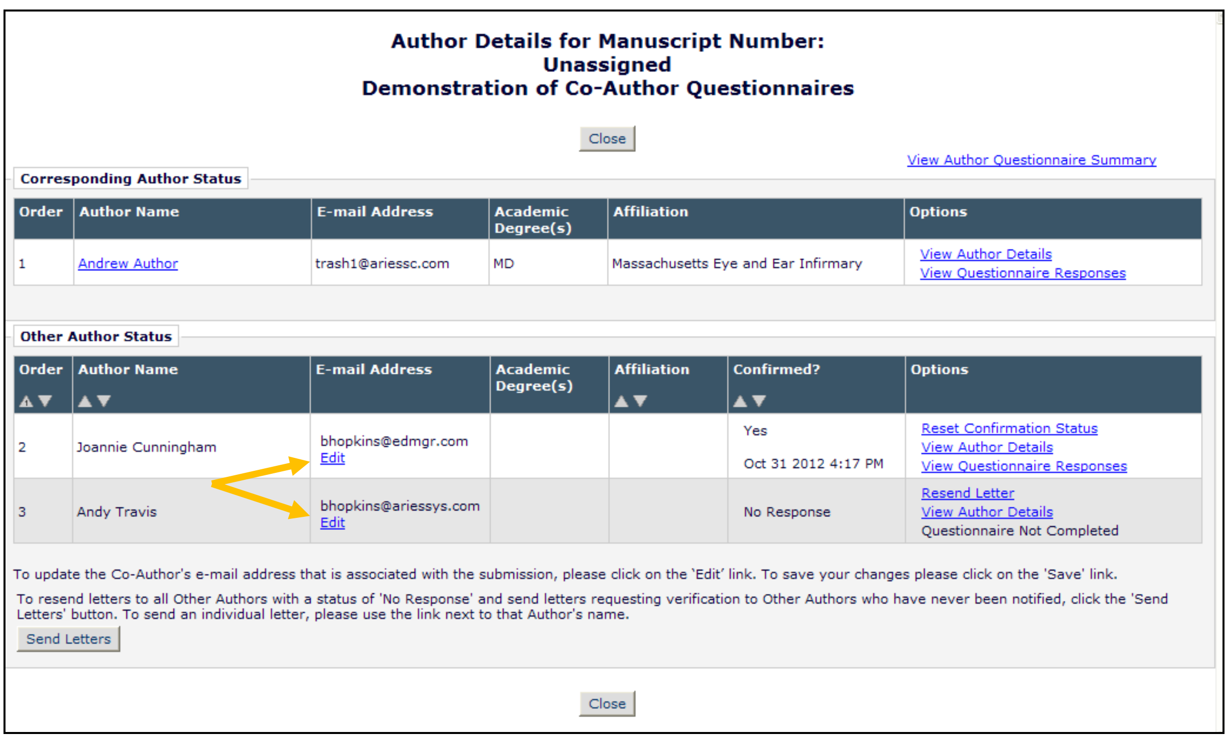
Other Author Status

Order	Author Name	E-mail Address	Academic Degree(s)	Affiliation	Confirmed?	Options
2	Joannie Cunningham	bhopkins@edmgr.com			Yes Oct 31 2012 4:17 PM	Reset Confirmation Status View Author Details View Questionnaire Responses
3	Andy Travis	bhopkins@ariessys.com			No Response	Resend Letter View Author Details Questionnaire Not Completed

To resend letters to all Other Authors with a status of 'No Response' and send letters requesting verification to Other Authors who have never been notified, click the 'Send Letters' button. To send an individual letter, please use the link next to that Author's name.

Send Letters

Also in EM v10.0, Editors may be given permission to update Co-Author E-mail Addresses directly from the *Author Status* page. When this permission is enabled, then the Editor will see an Edit link under the E-mail Addresses in the 'E-mail Address' column.



Author Details for Manuscript Number:
Unassigned
Demonstration of Co-Author Questionnaires

Close

View Author Questionnaire Summary

Corresponding Author Status

Order	Author Name	E-mail Address	Academic Degree(s)	Affiliation	Options
1	Andrew Author	trash1@ariessc.com	MD	Massachusetts Eye and Ear Infirmary	View Author Details View Questionnaire Responses

Other Author Status

Order	Author Name	E-mail Address	Academic Degree(s)	Affiliation	Confirmed?	Options
2	Joannie Cunningham	bhopkins@edmgr.com Edit			Yes Oct 31 2012 4:17 PM	Reset Confirmation Status View Author Details View Questionnaire Responses
3	Andy Travis	bhopkins@ariessys.com Edit			No Response	Resend Letter View Author Details Questionnaire Not Completed

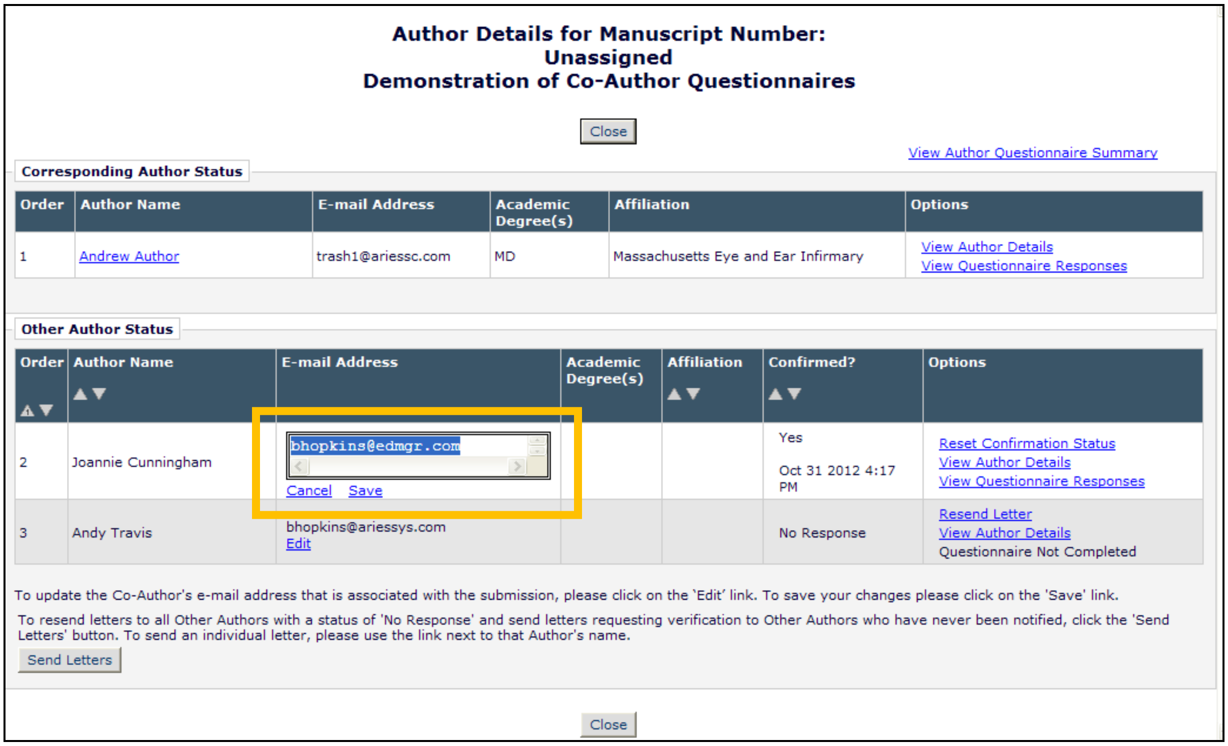
To update the Co-Author's e-mail address that is associated with the submission, please click on the 'Edit' link. To save your changes please click on the 'Save' link.

To resend letters to all Other Authors with a status of 'No Response' and send letters requesting verification to Other Authors who have never been notified, click the 'Send Letters' button. To send an individual letter, please use the link next to that Author's name.

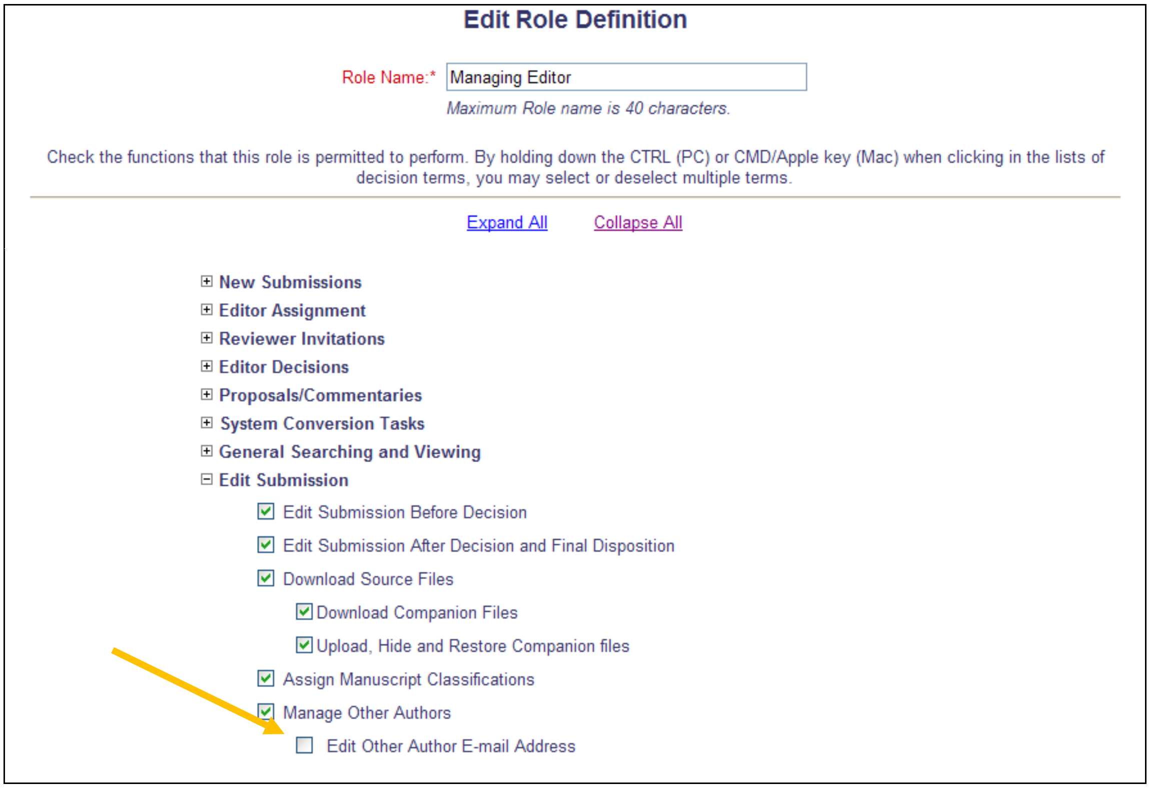
Send Letters

Close

Clicking this link for any Other Author opens a text box displaying each e-mail address entered. The Editor may then edit the e-mail address, or add an additional address if desired without having to Edit the submission. The Editor may click the Cancel link to “escape” the editing, or click Save to commit the changes to the system. NOTE: If the Co-Author is a registered user on the site, the-email address is only updated on the Submission record, not on the Co-Author’s People Record.



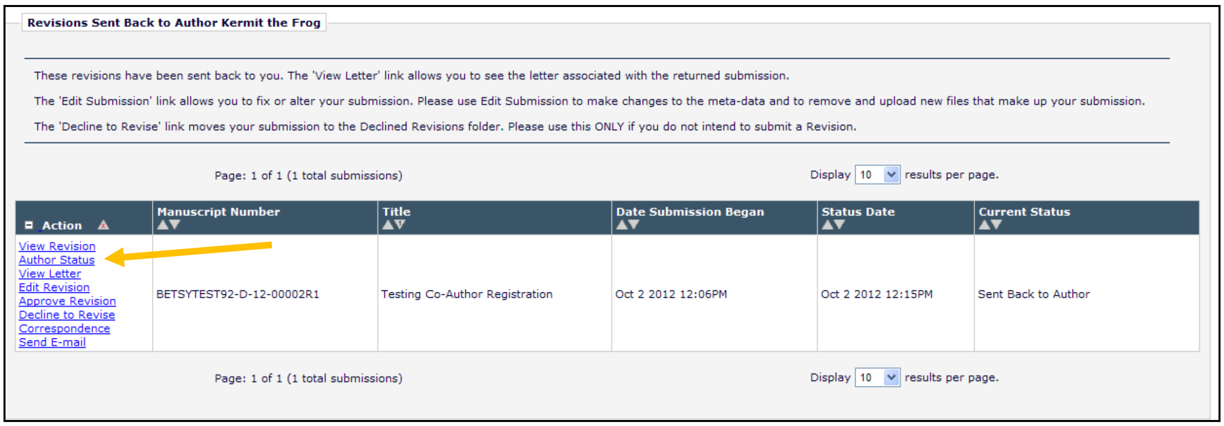
TO CONFIGURE:
To allow Editors to edit the e-mail addresses of Other Authors directly on the *Author Status* page rather than having to Edit a submission, set/check the new ‘Edit Other Author E-mail Address’ permission. NOTE: This permission is a sub-permission of the existing ‘Manage Other Authors’ permission; Editors must be able to Manage Other Authors in order to Edit E-mail Addresses.


Edit Role Definition
Role Name:*
Managing Editor
Maximum Role name is 40 characters.
Check the functions that this role is permitted to perform. By holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking in the lists of decision terms, you may select or deselect multiple terms.
Expand All
Collapse All
New Submissions
Editor Assignment
Reviewer Invitations
Editor Decisions
Proposals/Commentaries
System Conversion Tasks
General Searching and Viewing
Edit Submission
Edit Submission Before Decision
Edit Submission After Decision and Final Disposition
Download Source Files
Download Companion Files
Upload, Hide and Restore Companion files
Assign Manuscript Classifications
Manage Other Authors
Edit Other Author E-mail Address

Enhancements for Managing Other (Co-) Authors – Corresponding Author

In EM v9.2, publications that use the Co-Author Verification/Registration feature may also provide Corresponding Authors permission to "View Other Author Status". When this permission is enabled, and at least one Co-Author on the submission has been sent the notification that verification of their contribution is required, then the Corresponding Author sees the Author Status Action Link (re-named in v10.0) in the *Submissions Sent Back to Author*, *Submissions Being Processed*, *Revisions Being Processed*, and *Submissions With a Decision* folders. The link leads to the Author version of the *Other Author Status* page.

New in EM v10.0, the Author Status Action Link is now available in the *Revisions Sent Back to Author* folder.



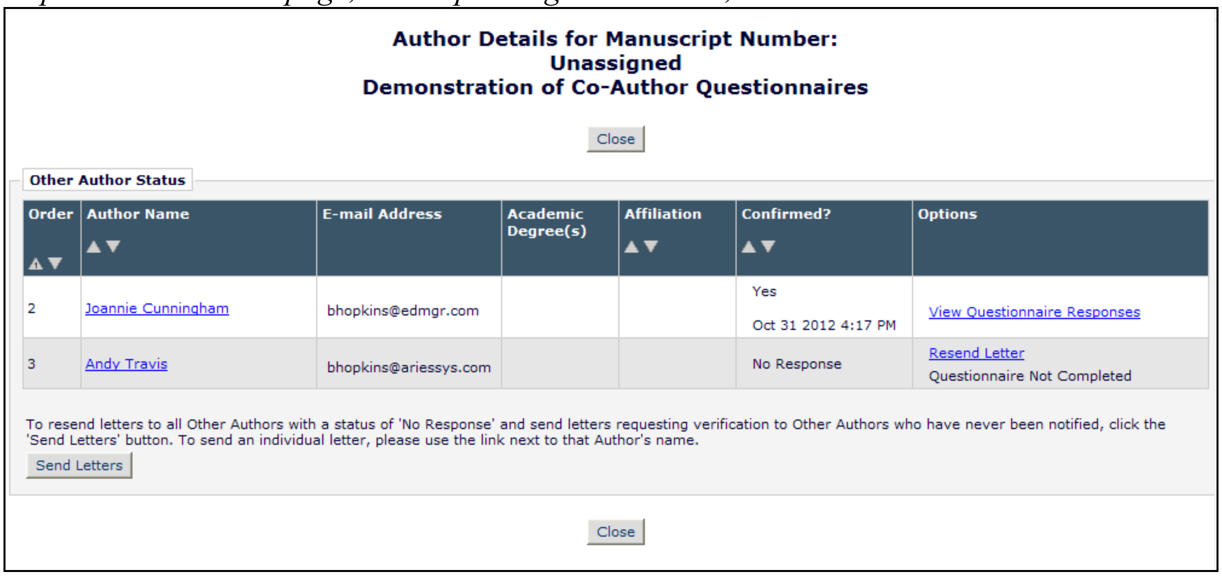
Additionally, publications may enable Corresponding Authors to manage the Co-Author process. Corresponding Authors may be given permission to Manage Co-Author verifications and update Co-Author E-mail Addresses directly from the *Author Status* page (re-named in v10.0). Publications may also now configure the letter sent at the 'Notify Other Authors' event to be sent "From" the Corresponding Author, which allows any "bounced" letters to be directed to the Corresponding Author, letting them know the e-mail address entered on the 'Add/Edit/Remove Authors' step is incorrect.

When the Author Role is given permission to 'Manage Other Authors', then an additional 'Options' column is displayed on the existing *Author Details* page when that page is available to Corresponding Authors. Authors may see the following links in this column:

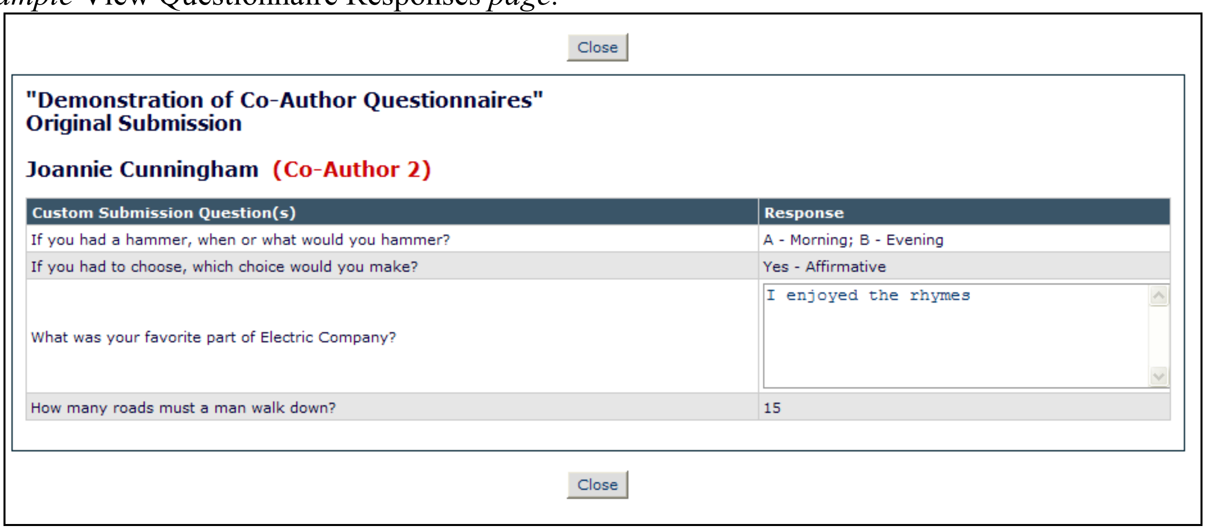
1. View Questionnaire Responses – displays for Co-Authors who have submitted responses to the Author Questionnaire. Clicking on the link navigates the Corresponding Author to the new *View Author Questionnaire* page (see the "Co-Author Questionnaires" section of these Release Notes for more information).
2. "Questionnaire Not Completed" – displays if an Author Questionnaire is configured for the Article Type but the Co-Author has not yet submitted responses.
3. Resend Letter – sends the letter configured for the 'Notify Other Authors' event to that specific Co-Author.
4. Request Confirmation – displays for any Co-Author that has not yet been sent the letter configured for the 'Notify Other Authors' event.

Corresponding Authors with ‘Manage Other Authors’ permission will now see a ‘Send Letters’ button on this page. Clicking this button will send letters to all Co-Authors with a status of ‘No Response’ or ‘Confirmation Not Requested’.

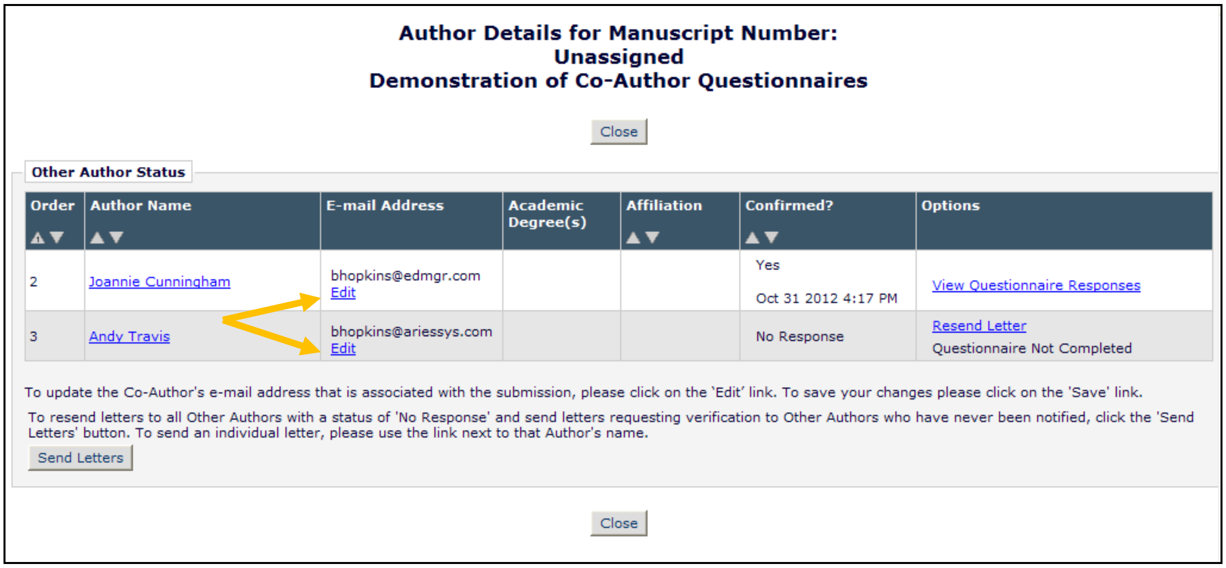
Sample Author Details *page; Corresponding Author view;*



Sample View Questionnaire Responses *page:*

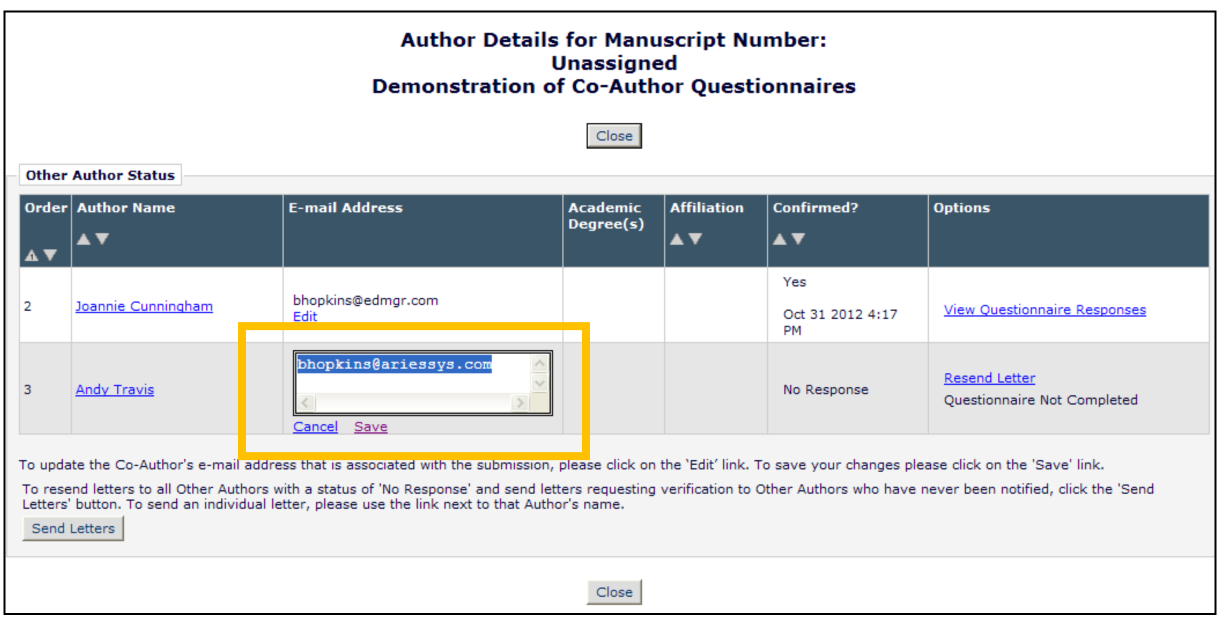


Authors may be given an additional permission that allows them to edit the e-mail addresses of Other Authors directly on the *Author Details* page. When this permission is enabled, then the Corresponding Author will see an Edit link under the E-mail Addresses in the ‘E-mail Address’ column.

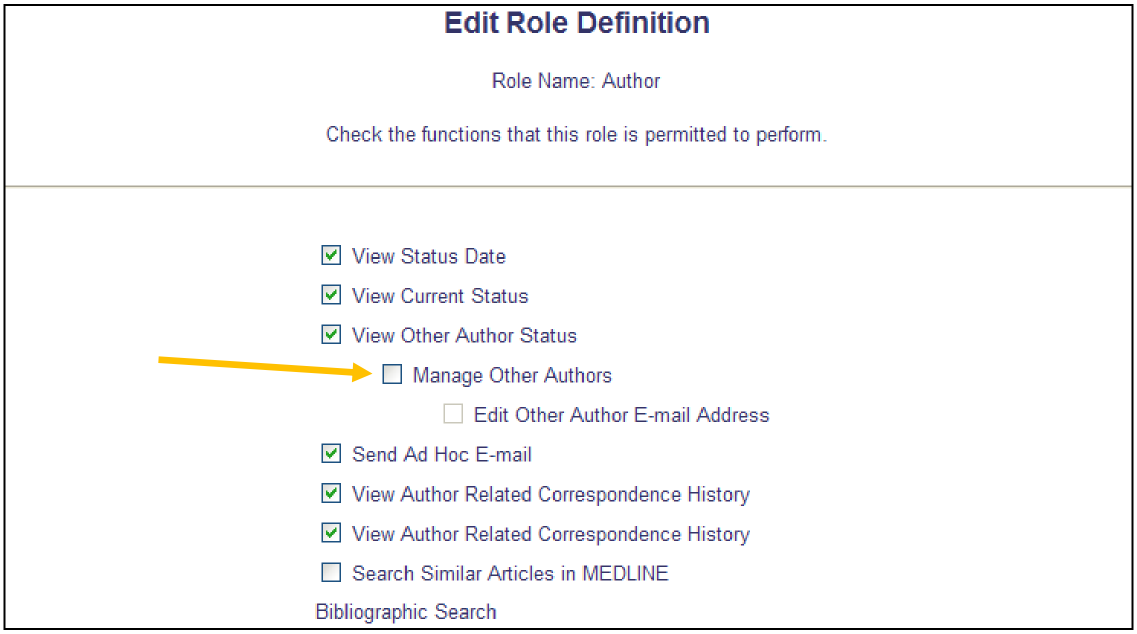


Clicking this link for any Other Author opens a text box displaying each e-mail address entered. The Corresponding Author may then edit the e-mail address, or add an additional address if desired. This feature is particularly of use in cases where the Co-Author hasn't received a notification due to an incorrect e-mail address.

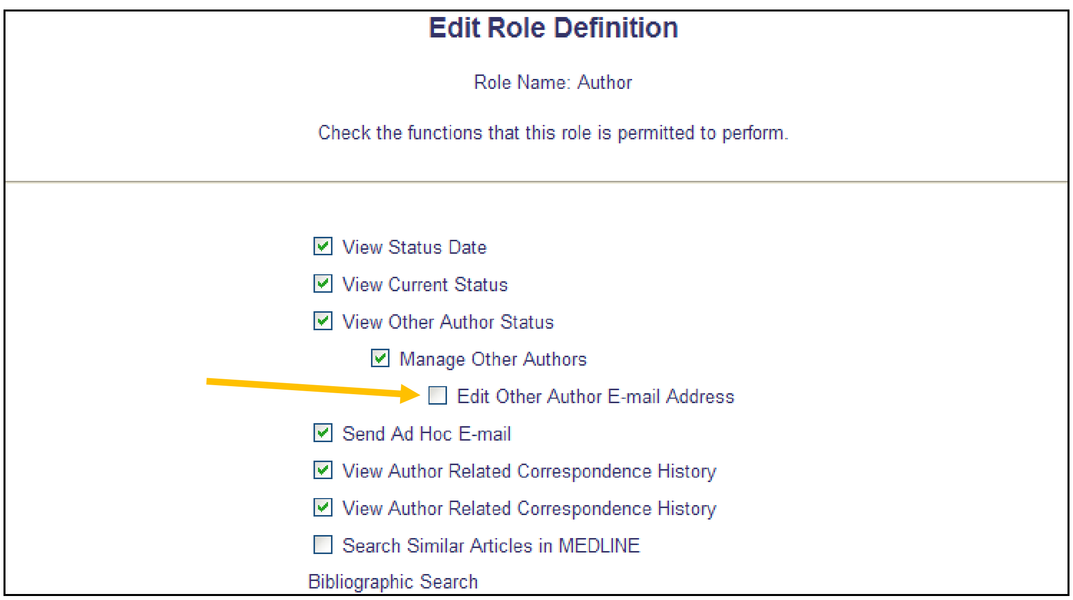
The Corresponding Author may click the Cancel link to "escape" the editing, or click Save to commit the changes to the system. NOTE: If the Co-Author is a registered user on the site, the e-mail address is only updated on the Submission record, not on the Co-Author's People Record.



TO CONFIGURE:
To allow Corresponding Authors to manage the Co-Author process, go to RoleManager, Author Role, and select/check the new 'Manage Other Authors' sub-permission located under the existing 'View Other Author Status' permission.



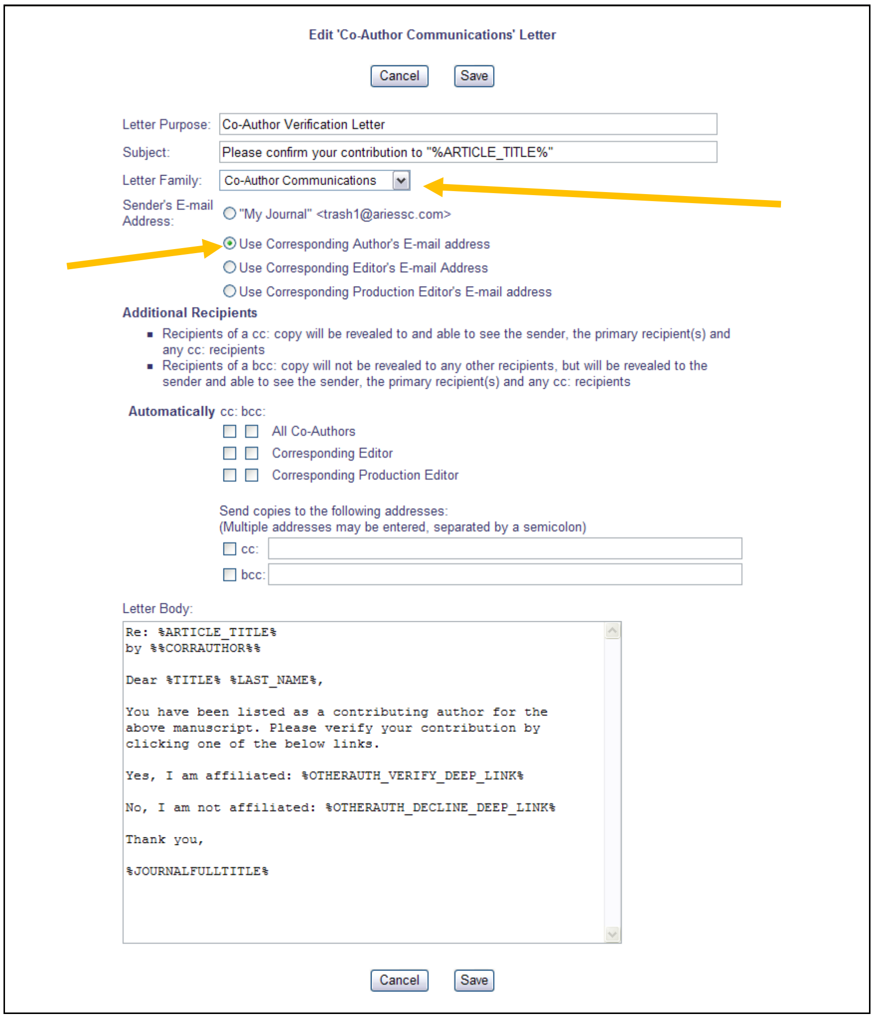
To further allow Authors to edit the e-mail addresses of Other Authors directly on the *Author Status* page rather than having to Edit a submission, set/check the new 'Edit Other Author E-mail Address' permission. NOTE: This permission is a sub-permission of the new 'Manage Other Authors' permission; Authors must be able to Manage Other Authors in order to Edit E-mail Addresses.



A new Letter Family is introduced in EM v10.0 called 'Co-Author Communications'. On upgrade to v10.0, any letter currently associated with the existing 'Notify Other Authors' event for Author letters is automatically assigned to the new letter family; all existing settings are retained. To configure a letter in the 'Co-Author Communications' Letter Family to be sent "From" the Corresponding Author, go to an existing letter in this family, or Add a new letter.

Select the ‘Co-Author Communications’ letter family, and on the configuration page, select the radio button next to the ‘Use Corresponding Author’s E-mail address’ option in the ‘Sender’s E-Mail Address’ section of the page.

NOTE: If the letter is configured to use the Corresponding Author’s e-mail address as the sender of the letter, but the Corresponding Author does not have a valid e-mail address, the publication’s ‘Set E-mail From’ address is used.

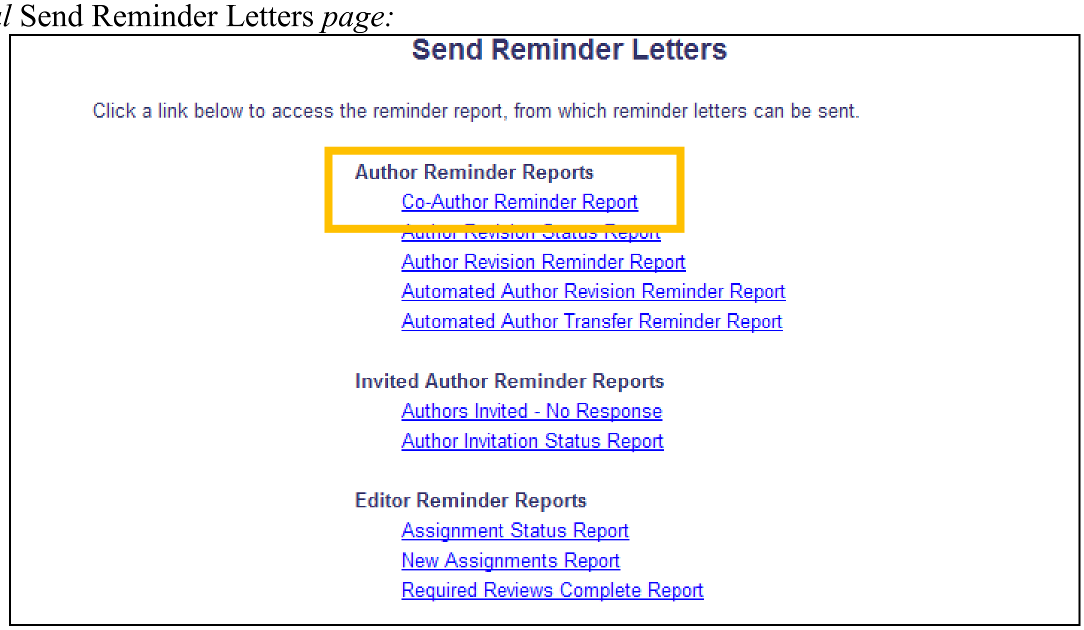


Co-Author Reminder Report

In EM v9.2, publications can configure Article Types so that Other (Co-) Authors are requested to verify their contributing authorship or to verify and be registered users on the publication. New in EM v10.0, Editors with either 'Produce Reports' permission or 'Send Author Reminders' permission will now have a new 'Co-Author Reminder Report' listed in the 'Author Reminder Reports' section to allow publications to send reminders to those Other Authors that have not responded to their verification request.

Partial Reports *page display:*

Partial Send Reminder Letters *page:*



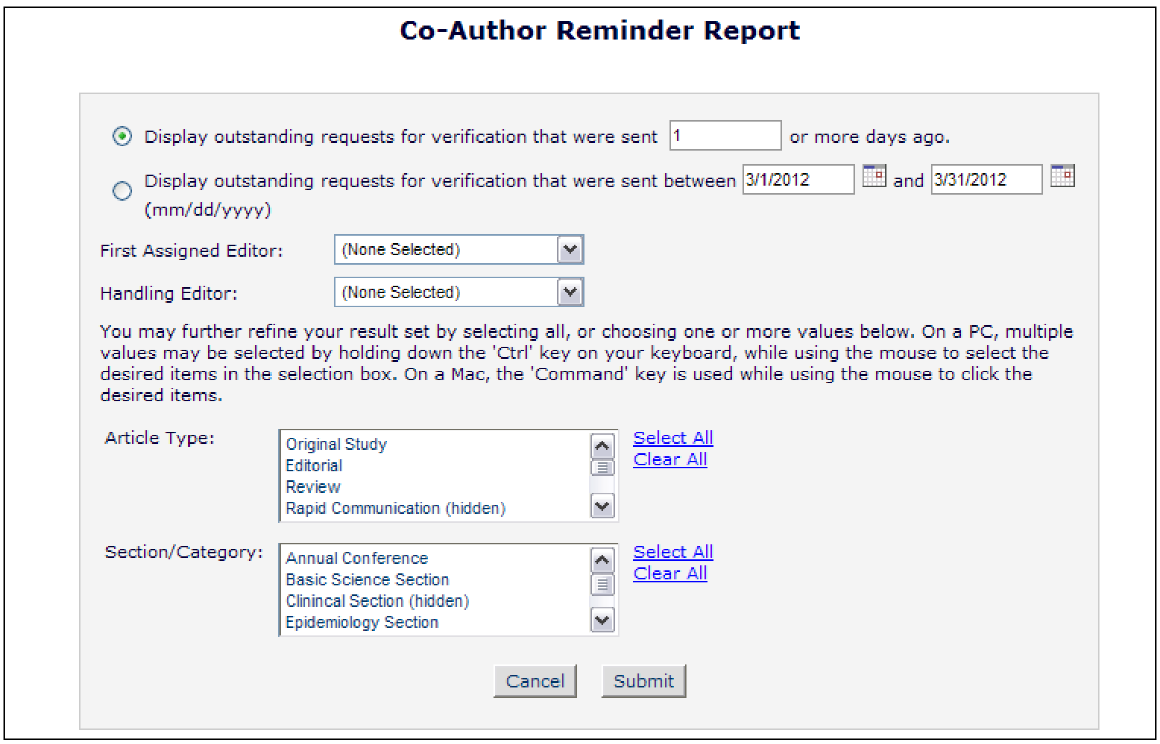
Clicking on the Co-Author Reminder Report link brings the Editor to the *Co-Author Reminder Report* page. Editors may run the report using one of two main criteria:

i. "Display outstanding requests for verification that were sent {n} or more days ago", where a number entry box is displayed in place of the {n}.
   - This option is selected by default on first loading the page.
   - The default value entered in the box is 1.

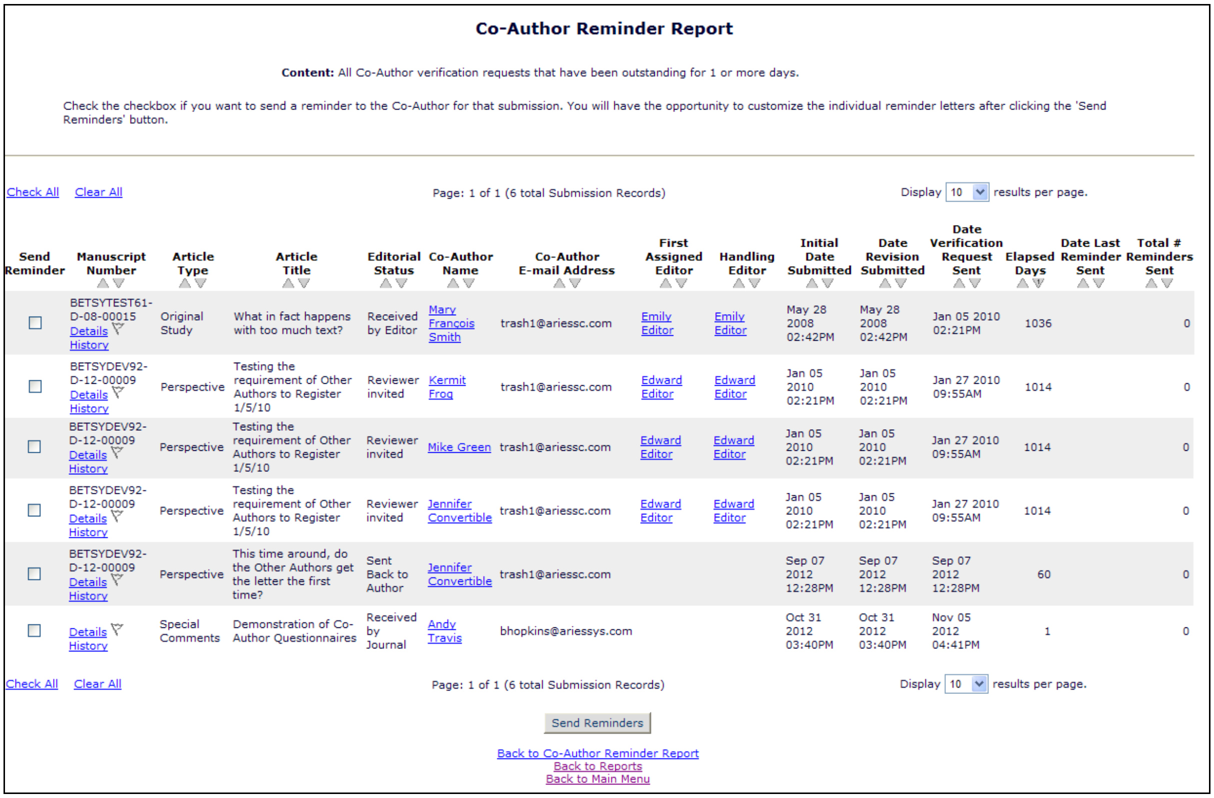
ii. "Display outstanding requests for verification that were sent between {date} and {date} (mm/dd/yyyy)".

Results may additionally be limited by:

- First Assigned Editor
- Handling Editor
- Selected Article Types
- Selected Section/Categories (if used by your publication)



When the report is run, the results display one row per Co-Author who has received a notification letter but has either not responded, or has partially saved a questionnaire but has not completed the questionnaire, so has not yet completed the confirmation process. Additionally, if the Editor running the report has the 'Restrict Reminder Reports to Assigned Submissions' permission set, he will only see Co-Authors for submissions on which this Editor is in the Editor Chain.



Co-Author Reminder Report

Content: All Co-Author verification requests that have been outstanding for 1 or more days.

Check the checkbox if you want to send a reminder to the Co-Author for that submission. You will have the opportunity to customize the individual reminder letters after clicking the 'Send Reminders' button.

Check All   Clear All   Page: 1 of 1 (6 total Submission Records)   Display 10 results per page.

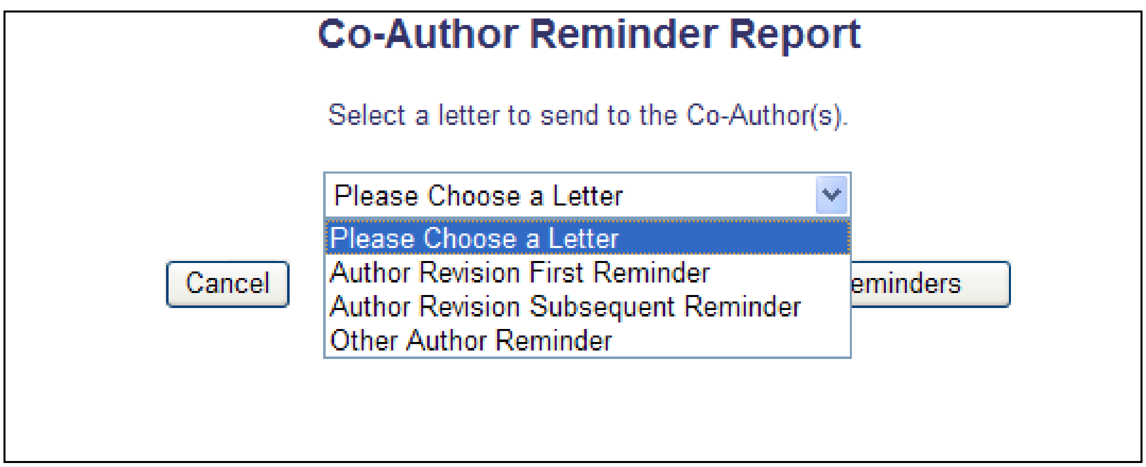
Send Reminder	Manuscript Number	Article Type	Article Title	Editorial Status	Co-Author Name	Co-Author E-mail Address	First Assigned Editor	Handling Editor	Initial Date Submitted	Date Revision Submitted	Date Verification Request Sent	Elapsed Days	Date Last Reminder Sent	Total # Reminders Sent
☐	BETSYTEST61-D-08-00015 Details History	Original Study	What in fact happens with too much text?	Received by Editor	Mary François Smith	trash1@ariessc.com	Emily Editor	Emily Editor	May 28 2008 02:42PM	May 28 2008 02:42PM	Jan 05 2010 02:21PM	1036		0
☐	BETSYDEV92-D-12-00009 Details History	Perspective	Testing the requirement of Other Authors to Register 1/5/10	Reviewer invited	Kermit Frog	trash1@ariessc.com	Edward Editor	Edward Editor	Jan 05 2010 02:21PM	Jan 05 2010 02:21PM	Jan 27 2010 09:55AM	1014		0
☐	BETSYDEV92-D-12-00009 Details History	Perspective	Testing the requirement of Other Authors to Register 1/5/10	Reviewer invited	Mike Green	trash1@ariessc.com	Edward Editor	Edward Editor	Jan 05 2010 02:21PM	Jan 05 2010 02:21PM	Jan 27 2010 09:55AM	1014		0
☐	BETSYDEV92-D-12-00009 Details History	Perspective	Testing the requirement of Other Authors to Register 1/5/10	Reviewer invited	Jennifer Convertible	trash1@ariessc.com	Edward Editor	Edward Editor	Jan 05 2010 02:21PM	Jan 05 2010 02:21PM	Jan 27 2010 09:55AM	1014		0
☐	BETSYDEV92-D-12-00009 Details History	Perspective	This time around, do the Other Authors get the letter the first time?	Sent Back to Author	Jennifer Convertible	trash1@ariessc.com			Sep 07 2012 12:28PM	Sep 07 2012 12:28PM	Sep 07 2012 12:28PM	60		0
☐	Details History	Special Comments	Demonstration of Co-Author Questionnaires	Received by Journal	Andy Travis	bhopkins@ariessys.com			Oct 31 2012 03:40PM	Oct 31 2012 03:40PM	Nov 05 2012 04:41PM	1		0

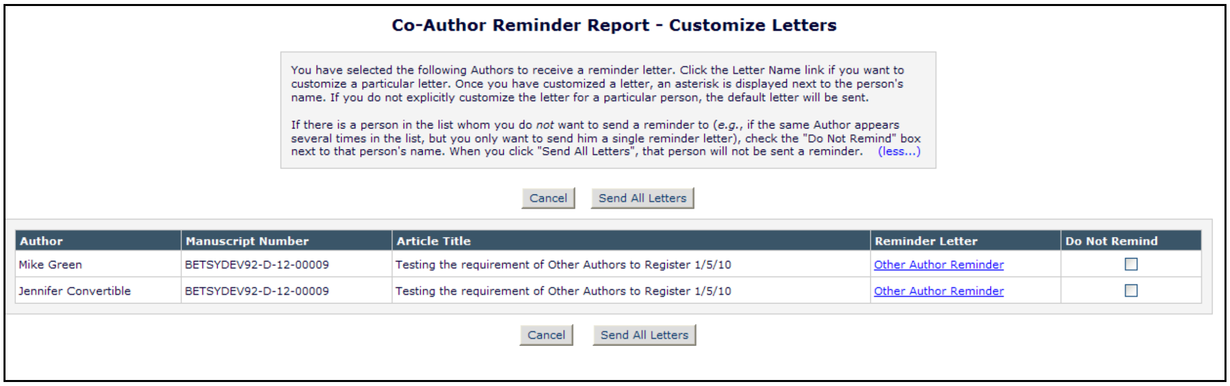
Check All   Clear All   Page: 1 of 1 (6 total Submission Records)   Display 10 results per page.

Send Reminders

Back to Co-Author Reminder Report
Back to Reports
Back to Main Menu

Editors may select one or more Co-Authors to receive reminders by selecting/checking the box on the left and clicking the 'Send Reminders' button at the bottom of the page. The Editor may select a letter from the 'Author Reminder' letter family, displayed in the drop-down on the next page. After selecting a letter, the Editor may either 'Send Reminders', which will send the selected letter, or 'Customize Reminders', which will allow him to customize each reminder before sending.




Co-Author Reminder Report - Customize Letters

You have selected the following Authors to receive a reminder letter. Click the Letter Name link if you want to customize 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.

If there is a person in the list whom you do *not* want to send a reminder to (*e.g.*, if the same Author appears several times in the list, but you only want to send him a single reminder letter), check the "Do Not Remind" box next to that person's name. When you click "Send All Letters", that person will not be sent a reminder. (less...)

Cancel Send All Letters

Author	Manuscript Number	Article Title	Reminder Letter	Do Not Remind
Mike Green	BETSYDEV92-D-12-00009	Testing the requirement of Other Authors to Register 1/5/10	Other Author Reminder	☐
Jennifer Convertible	BETSYDEV92-D-12-00009	Testing the requirement of Other Authors to Register 1/5/10	Other Author Reminder	☐

Cancel Send All Letters

TO CONFIGURE:
To enable Editors to send Co-Author Reminders, go to RoleManager, select the Editor role, and select/check the ‘Produce Reports’ permission and/or ‘Send Author Reminders’ permission.

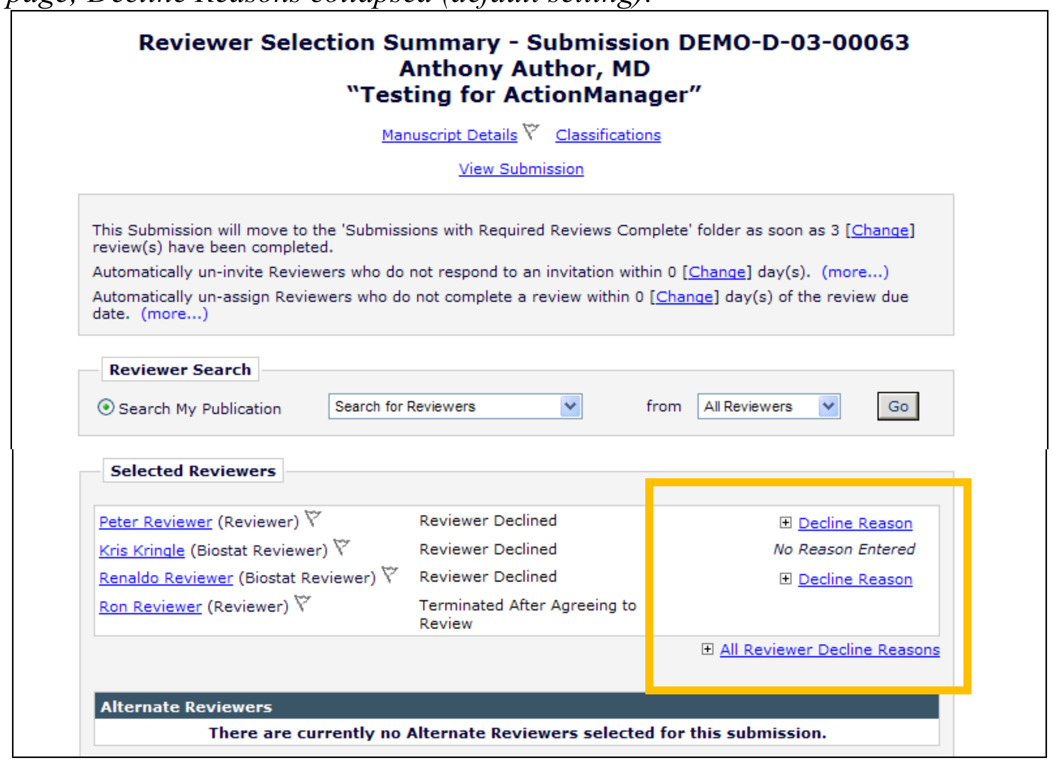
To create a new Reminder Letter for this use, go to PolicyManager, Edit Letters, and Add a new letter to the ‘Author Reminder’ Letter Family.

Better Access to Reviewer Declined Reason

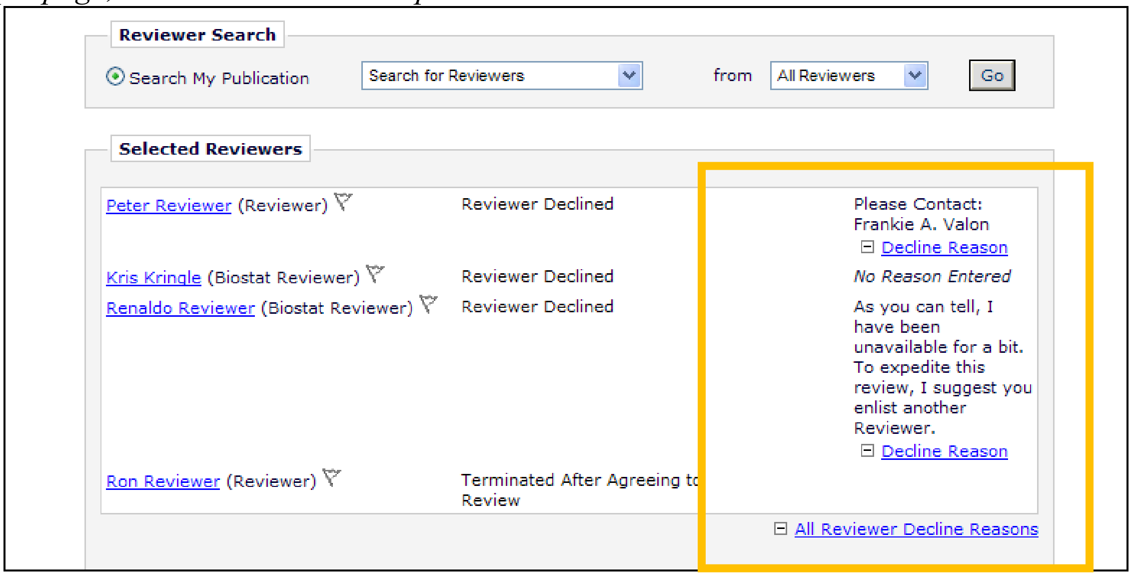
In EM v9.2, when an invited Reviewer declines a Reviewer Invitation, they are asked to provide a reason for declining in a text box. Editors may view these Decline reasons for information, or perhaps for alternate Reviewers suggested by the declining Reviewer, but the information is not readily available from the *Reviewer Summary* page.

New in EM v10.0, the Reviewer Selection Summary page is enhanced to include new hyperlinks to Reviewer decline reasons. For each Reviewer that has declined to review a submission, the 'Selected Reviewers' grid contains a Decline Reason link that, when clicked, will expand to display the Reviewer's reason. If the Reviewer did not provide a Reason, the text '*No Reason Entered*' is displayed. Additionally, an All Reviewer Decline Reasons link is displayed directly below the 'Selected Reviewers' grid that will expand/collapse all Reviewer Decline reasons.

Sample page; Decline Reasons collapsed (default setting):

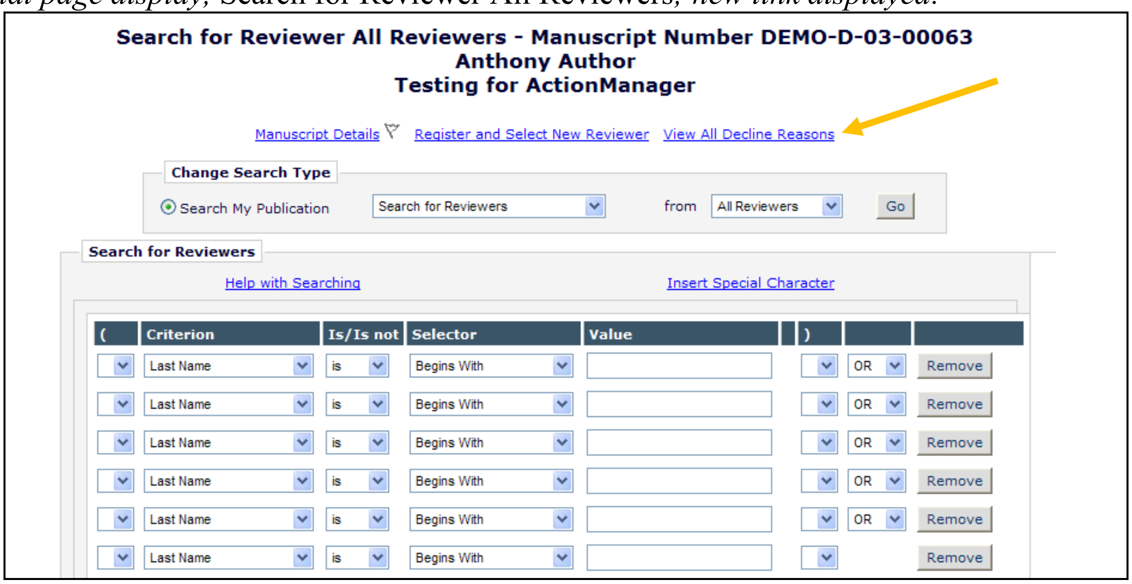


Sample page; all Decline Reasons expanded:



Additionally, the *Search for Reviewer* pages are enhanced with a new hyperlink at both the top and bottom called View All Decline Reasons.

Partial page display, Search for Reviewer All Reviewers*; new link displayed:*



Clicking this link on any of the *Search for Reviewer* pages opens a pop-up window displaying all Declined Reviewers and Reasons for the current revision of the submission. The default sort order of this page is by the 'Date Invited' column in ascending order, though the results may be sorted by 'Reviewer Name' or 'Date Declined' as well.

All Reviewer Decline Reasons for Manuscript Number: DEMO-D-03-00063
Anthony Author, MD
"Testing for ActionManager"

Close

All Reviewer Decline Reasons

Reviewer Name	Date Invited	Date Declined	Decline Reason
Renaldo Reviewer	Jan 30 2009 04:10PM	Sep 26 2012 12:16PM	As you can tell, I have been unavailable for a bit. To expedite this review, I suggest you enlist another Reviewer.
Kris Kringle, - 101	Jan 30 2009 04:10PM	Sep 26 2012 12:19PM	*No Reason Entered*
Peter Reviewer	Jan 30 2009 04:10PM	Sep 26 2012 12:20PM	Please Contact: Frankie A. Valon

Close

TO CONFIGURE:
No configuration necessary to view the Reviewer Decline information. Editors with permission to Invite, Assign, Propose, or Invite Alternate Reviewers will see this information displayed.

Increased Access to Discussions

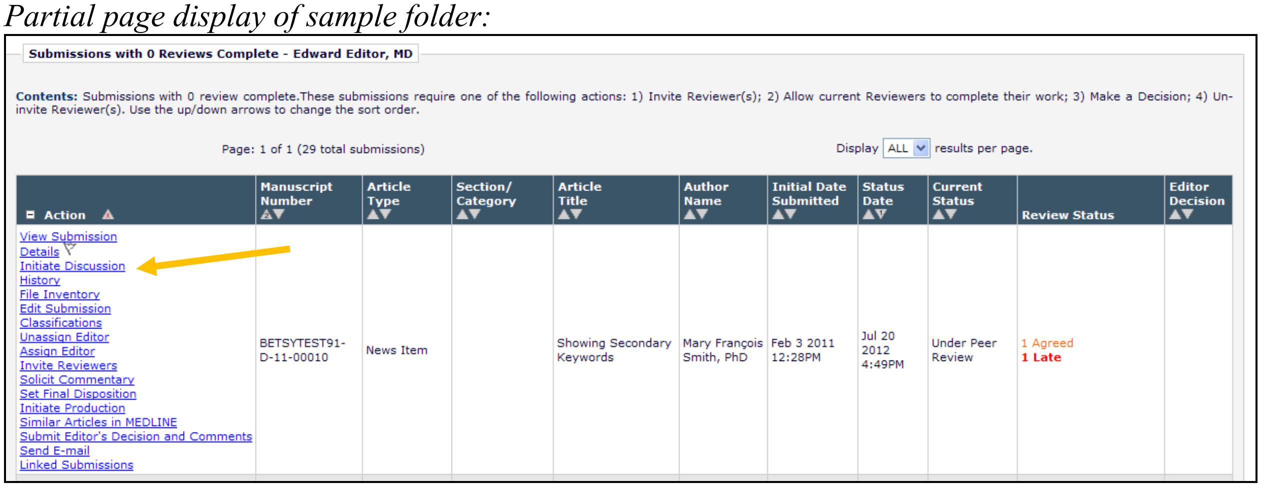
In EM v9.2, Editors may be given permission to Initiate Discussions on submissions parallel to the peer-review workflow. Any Editor may be invited to participate in a Discussion. To initiate a discussion, however, editors with 'Manage Discussion' permission must go to the *Details* page for the submission to initiate a discussion.

New in EM v.10.0, Editors with 'Manage Discussion' permission will now see the Initiate Discussion Action Link displayed in the following folders:

- New Submissions
- Revised Submissions
- New Submissions Requiring Assignment
- Revised Submissions Requiring Assignment
- Direct-to-Editor New Submissions
- Direct-to-Editor Revised Submissions
- New Invitations
- New Assignments
- Submissions with Rescinded Decision
- Submissions with X (0,1,2,3,4+) Reviews Complete
- Submissions Requiring Additional Reviewers
- Submissions with Required Reviews Complete
- Submissions with One or More Late Reviews
- Reviewers Invited - No Response
- Submissions Under Review
- Editors Invited - None Yet Assigned
- Search Submissions

When the Initiate Discussion Action Link displays in these folders, it displays below the Details link, though if the Details link is not available in the folder, the new link displays below View Submission.

Partial page display of sample folder:



Submissions with 0 Reviews Complete - Edward Editor, MD

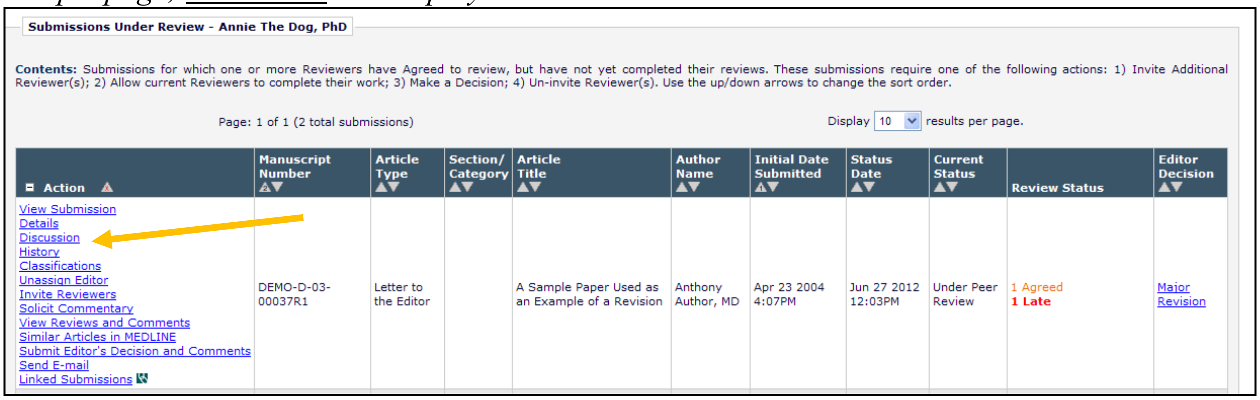
Contents: Submissions with 0 review complete.These submissions require one of the following actions: 1) Invite Reviewer(s); 2) Allow current Reviewers to complete their work; 3) Make a Decision; 4) Un-invite Reviewer(s). Use the up/down arrows to change the sort order.

Page: 1 of 1 (29 total submissions) Display ALL results per page.

Action	Manuscript Number	Article Type	Section/ Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Review Status	Editor Decision
View Submission Details Initiate Discussion History File Inventory Edit Submission Classifications Unassign Editor Assign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production Similar Articles in MEDLINE Submit Editor's Decision and Comments Send E-mail Linked Submissions	BETSYTEST91-D-11-00010	News Item		Showing Secondary Keywords	Mary François Smith, PhD	Feb 3 2011 12:28PM	Jul 20 2012 4:49PM	Under Peer Review	1 Agreed 1 Late	

When a Discussion has been initiated on a submission, the Initiate Discussion link is replaced by the Discussion link. This link displays for any Editor with ‘Manage Discussions’ or ‘View All Discussions’ permission, or for an Editor that does not have either permission but has been invited to participate in a Discussion on that submission.

Sample page; Discussion link displays:



Submissions Under Review - Annie The Dog, PhD

Contents: Submissions for which one or more Reviewers have Agreed to review, but have not yet completed their reviews. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Allow current Reviewers to complete their work; 3) Make a Decision; 4) Un-invite Reviewer(s). Use the up/down arrows to change the sort order.

Page: 1 of 1 (2 total submissions)

Display 10 results per page.

Action	Manuscript Number	Article Type	Section/ Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Review Status	Editor Decision
View Submission Details Discussion History Classifications Unassign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Similar Articles in MEDLINE Submit Editor's Decision and Comments Send E-mail Linked Submissions	DEMO-D-03-00037R1	Letter to the Editor		A Sample Paper Used as an Example of a Revision	Anthony Author, MD	Apr 23 2004 4:07PM	Jun 27 2012 12:03PM	Under Peer Review	1 Agreed 1 Late	Major Revision

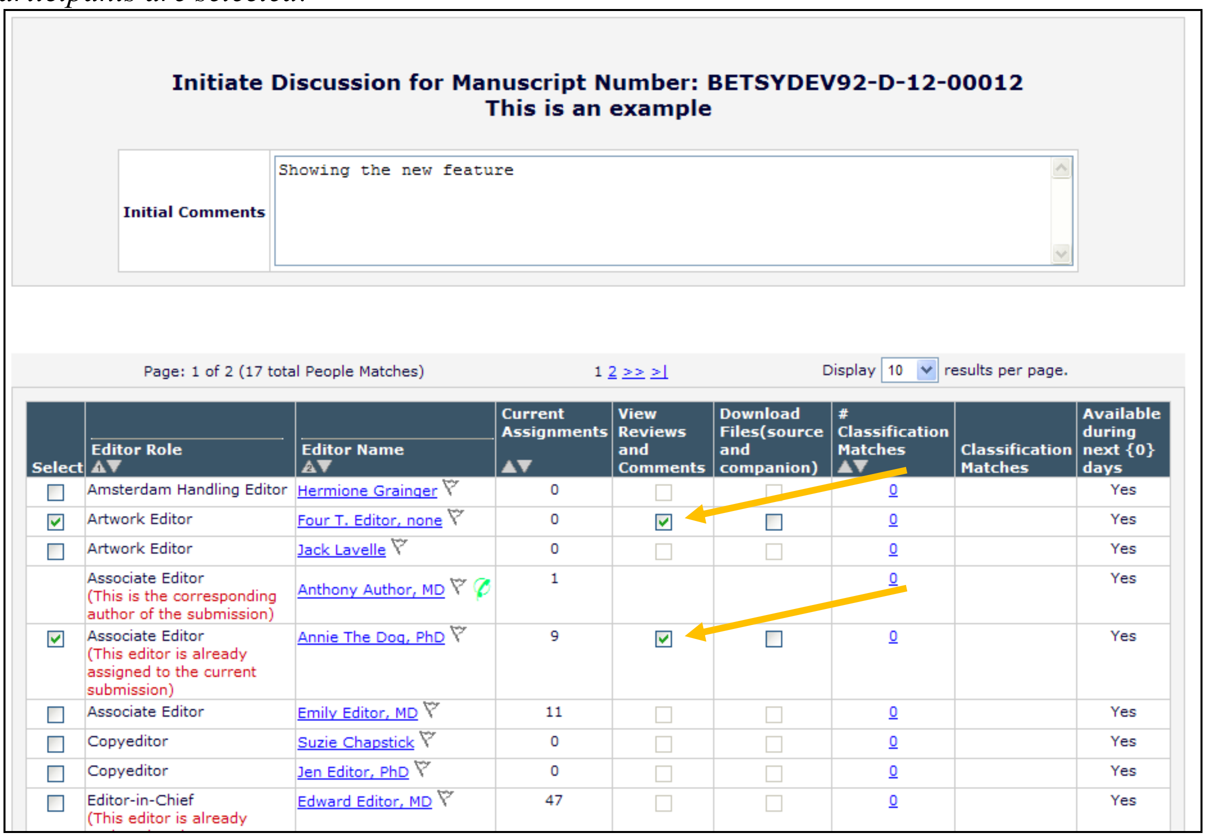
TO CONFIGURE:
No additional configuration required. To allow Editors to Initiate a Discussion, go to RoleManager, select the Editor Role, and select/check the ‘Manage Discussions’ permission. To allow Editors to view any Discussion, select/check the ‘View All Discussions’ permission.

Streamlined Selection of Discussion Forum Participants

In EM v9.2, publications may use the 'Discussion Forum' feature to enable Discussions among Editors in the system, outside of the peer review workflow. When an Editor (with proper permission) initiates, re-opens, or adds participants to a discussion, he decides if each participant can be given access to 'Download Files' associated with the submission or can 'View Reviews and Comments' associated with a submission. When choosing many participants, it can be very time consuming for the Initiator to select the participant permissions for each person (requiring an additional two extra clicks for every Editor selected).

New in EM v10.0, publications may configure their Discussion Forum Settings so that either or both of these options are always selected by default when each new participant is selected. Editors may then choose to disable these options manually for individual participants at the time of initiation, re-opening, or adding new participants.

Sample page; 'View Reviews and Comments' are configured to be automatically selected when Participants are selected:



Initiate Discussion for Manuscript Number: BETSYDEV92-D-12-00012
This is an example

Initial Comments: Showing the new feature

Page: 1 of 2 (17 total People Matches) 1 2 >> >| Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	View Reviews and Comments	Download Files(source and companion)	# Classification Matches	Classification Matches	Available during next {0} days
☐	Amsterdam Handling Editor	Hermione Grainger	0	☐	☐	0		Yes
☑	Artwork Editor	Four T. Editor, none	0	☑	☐	0		Yes
☐	Artwork Editor	Jack Lavelle	0	☐	☐	0		Yes
	Associate Editor (This is the corresponding author of the submission)	Anthony Author, MD	1			0		Yes
☑	Associate Editor (This editor is already assigned to the current submission)	Annie The Dog, PhD	9	☑	☐	0		Yes
☐	Associate Editor	Emily Editor, MD	11	☐	☐	0		Yes
☐	Copyeditor	Suzie Chapstick	0	☐	☐	0		Yes
☐	Copyeditor	Jen Editor, PhD	0	☐	☐	0		Yes
☐	Editor-in-Chief (This editor is already	Edward Editor, MD	47	☐	☐	0		Yes

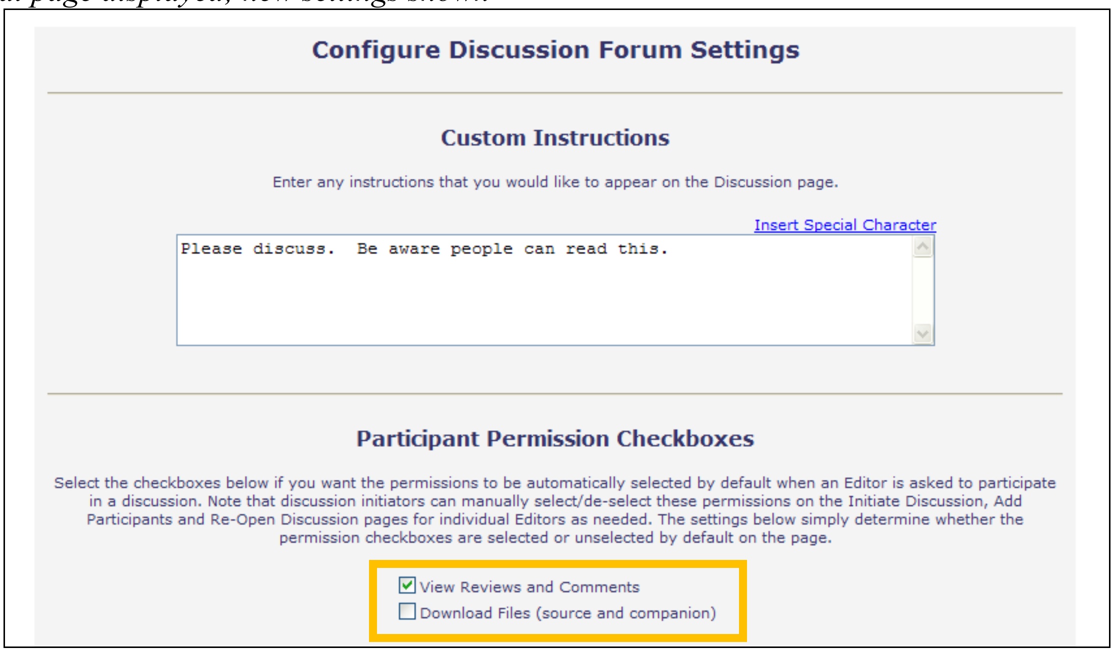
TO CONFIGURE:

Go to PolicyManager, and click the Configure Discussion Forum Settings in the 'General Policies' section. The new settings are located below 'Custom Instructions', in the 'Participant Permission Checkboxes' section.

Select/check the ‘View Reviews and Comments’ box on this page to have the corresponding ‘View Reviews and Comments’ box checked by default when adding participants to a discussion.

Select/check the ‘Download Files (source and companion)’ box on this page to have the corresponding ‘Download Files (source and companion)’ box checked by default when adding participants to a discussion.

Partial page displayed; new settings shown

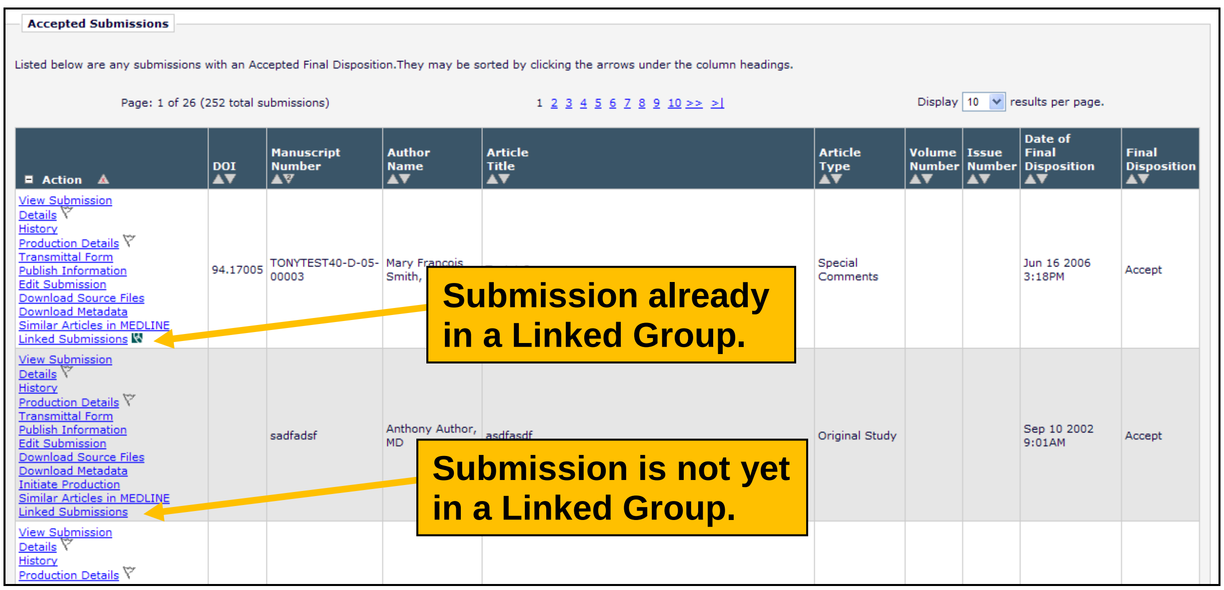


Enhanced Publisher Permissions - Linked Submissions

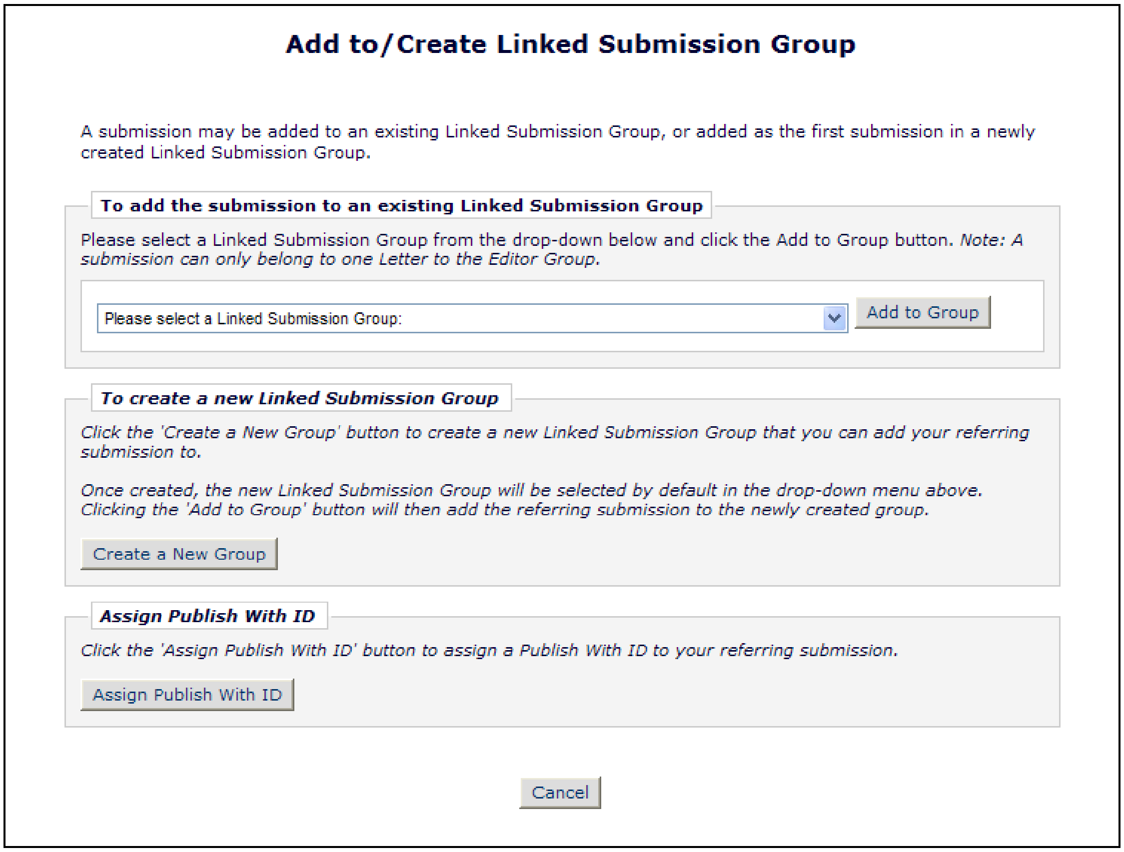
In EM v9.2, Editor Roles may use the Linked Submissions feature to link submissions together for general reference (for example, those that are related by Author or topic) or to group Letters to the Editor together (this type of Linked Group allows additional functionality when inviting Authors to provide a commentary). Publisher Roles may be given permission to view the groups of submissions and view the Linked Submission information of a submission when that submission is in a linked group, but they do not have the ability to manage Linked Submission Groups.

New in EM/PM v10.0, Publisher Roles may be given the additional permissions (currently available for Editor Roles) to 'Create/Edit Linked Submission Groups', and/or 'Set Active/Inactive Status on Linked Submission Groups'. As with Editor Roles, these permissions are sub-permissions of the existing 'View Linked Submission Groups' permission.

When Publisher roles have the 'Create/Edit Linked Submission Groups' permission enabled, Publishers with that role will now see the Linked Submissions link available for all submissions in the *Accepted Submissions* folder.

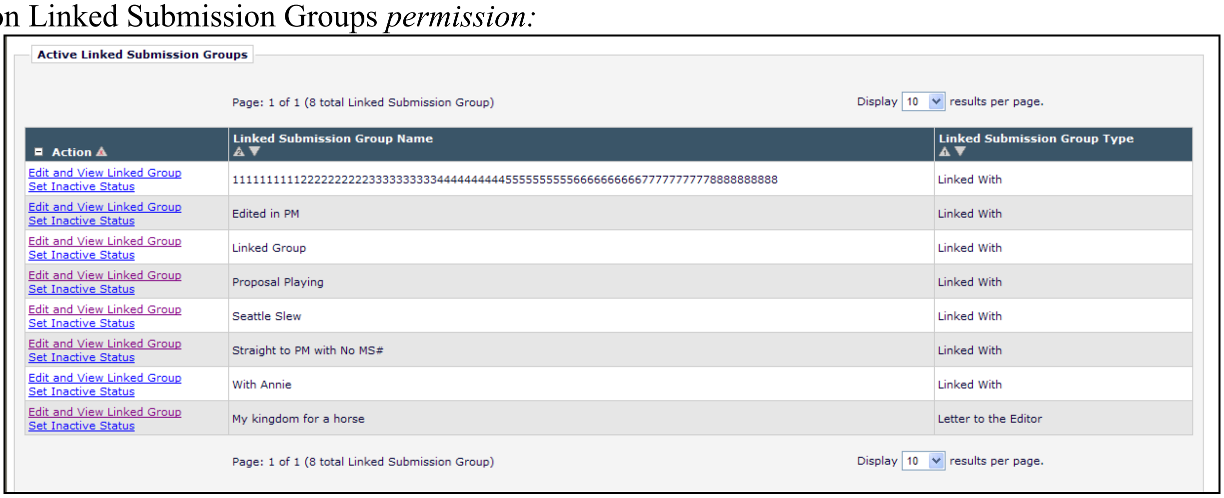


When the Publisher with this permission clicks the Linked Submissions link for a submission not in a Linked Submission group, he is taken to the *Add to/Create Linked Submission Group* page. He can select an existing group from the drop down (at the top of the page) and click the 'Add to Group' button, or he can click the 'Create a New Group' button to set up a new Group.



Additional options will also be available to Publisher Roles with either of the new permissions in the *Active Linked Submission Groups* folder. Submissions can be added to a group from this page (allowing multiple submissions to be added at once). For Publisher with 'Set Active/Inactive Status on Linked Submission Groups' permission enabled, Linked Submission Groups may be made 'Inactive', preventing additional submission from being added to the group, or re-activated from the *Inactive Linked Submission Groups* folder.

Sample Active Linked Submission Groups *page; Publisher Role with* Set Active/Inactive Status on Linked Submission Groups *permission:*



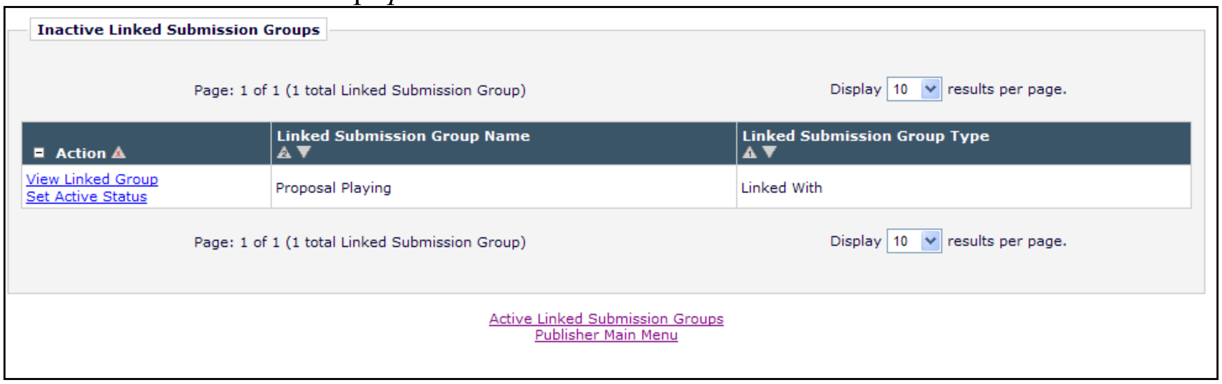
Active Linked Submission Groups

Page: 1 of 1 (8 total Linked Submission Group) Display 10 results per page.

Action	Linked Submission Group Name	Linked Submission Group Type
Edit and View Linked Group Set Inactive Status	1111111112222222222333333333344444444445555555555666666666677777777778888888888	Linked With
Edit and View Linked Group Set Inactive Status	Edited in PM	Linked With
Edit and View Linked Group Set Inactive Status	Linked Group	Linked With
Edit and View Linked Group Set Inactive Status	Proposal Playing	Linked With
Edit and View Linked Group Set Inactive Status	Seattle Slew	Linked With
Edit and View Linked Group Set Inactive Status	Straight to PM with No MS#	Linked With
Edit and View Linked Group Set Inactive Status	With Annie	Linked With
Edit and View Linked Group Set Inactive Status	My kingdom for a horse	Letter to the Editor

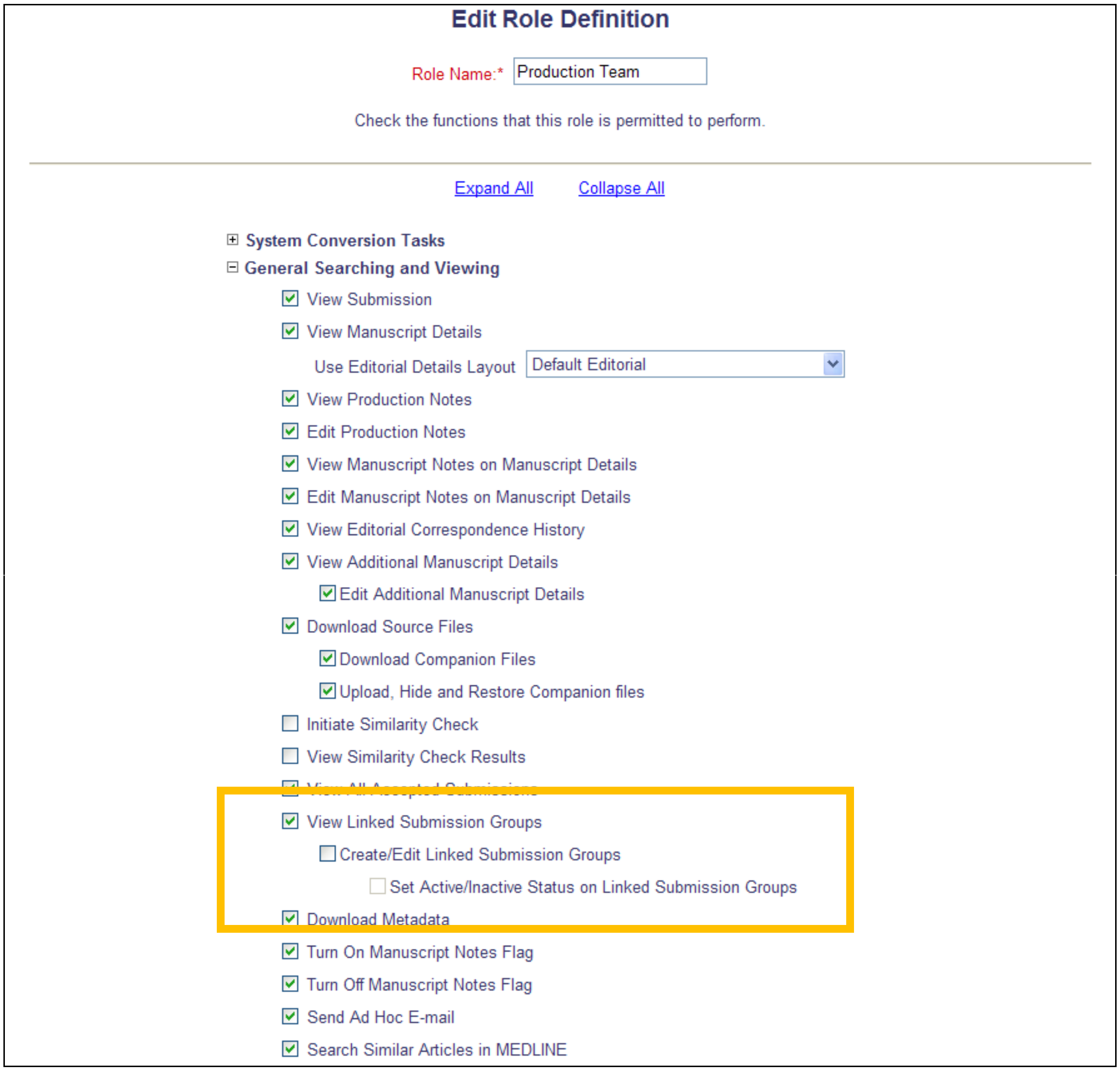
Page: 1 of 1 (8 total Linked Submission Group) Display 10 results per page.

Sample Inactive Linked Submission Groups *page; Publisher Role with* Set Active/Inactive Status for Linked Submission Groups *permission:*



TO CONFIGURE:
To enable the new permissions for Publisher Roles, go to RoleManager, select the appropriate Publisher Role, and go to the 'General Searching and Viewing' section. Two new sub-permissions are displayed under the existing 'View Linked Submission Groups' permission. These are:

- 'Create/Edit Linked Submission Groups' – This permission works in conjunction with the 'View Linked Submission Groups' permission. If enabled, the Publisher can create a new Linked Submission Group, as well as edit an existing one.
- 'Set Active/Inactive Status for Linked Submission Groups' – This permission works in conjunction with the 'Create/Edit Linked Submission Groups' permission. If enabled, the Publisher can set an inactive status on an active Linked Submission Group, or set an active status on an inactive one.


Edit Role Definition
Role Name:* Production Team
Check the functions that this role is permitted to perform.
Expand All
Collapse All
System Conversion Tasks
General Searching and Viewing
View Submission
View Manuscript Details
Use Editorial Details Layout
Default Editorial
View Production Notes
Edit Production Notes
View Manuscript Notes on Manuscript Details
Edit Manuscript Notes on Manuscript Details
View Editorial Correspondence History
View Additional Manuscript Details
Edit Additional Manuscript Details
Download Source Files
Download Companion Files
Upload, Hide and Restore Companion files
Initiate Similarity Check
View Similarity Check Results
View All Accepted Submissions
View Linked Submission Groups
Create/Edit Linked Submission Groups
Set Active/Inactive Status on Linked Submission Groups
Download Metadata
Turn On Manuscript Notes Flag
Turn Off Manuscript Notes Flag
Send Ad Hoc E-mail
Search Similar Articles in MEDLINE

Additional Features in Linked Submissions

In EM v9.2, submissions can be linked together in user-defined groups of related submissions using the Linked Submissions functionality. Editors (with permission) may view the groups of submissions, and may see the View Submission Action Link or the Go to Submission Action Link when the Editor has an open Editor Assignment associated with the submission.

New in EM v10.0, Editor and Publisher Roles (with proper permission) may now see the Details link for a submission and associated Submission Flags from both the *Linked Submissions for Manuscript* page and the *Edit Linked Submission Group* page (for Active Linked Submission Groups only).

Editors will see the Details link for submissions on which they are not blinded when:

- The Editor has a pending assignment for the current revision and has 'View Linked Submission Groups' permission enabled,
  OR
  The Editor has both 'View All Submissions' **and** 'Create/Edit Linked Submission Groups' permissions enabled

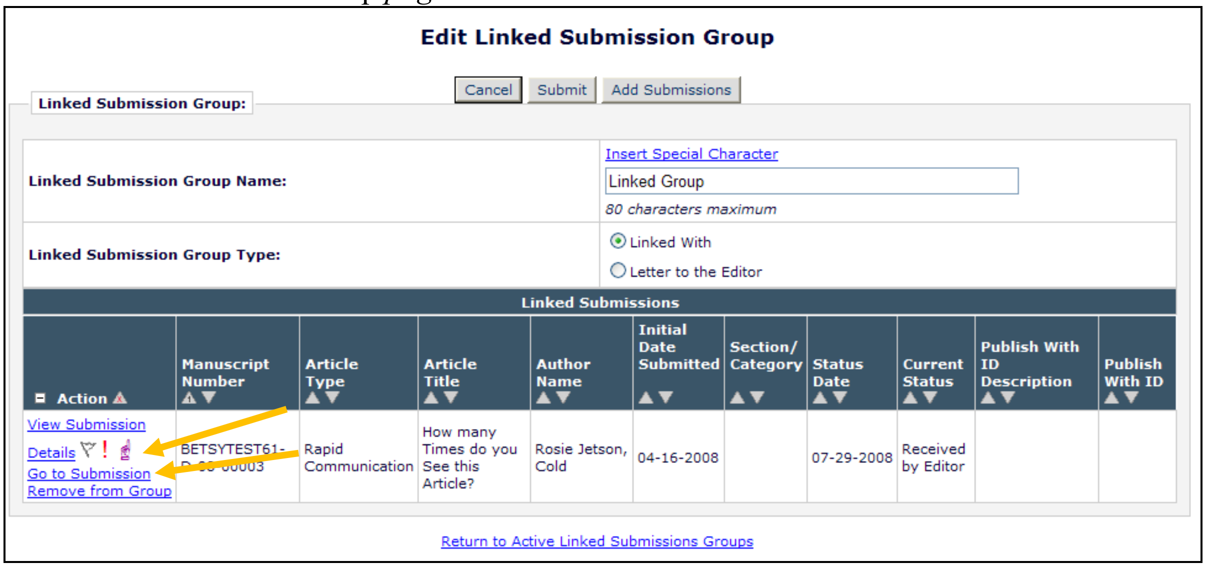
Publishers will see the Details link for submissions when three permissions are enabled: 'View Manuscript Details', 'View All Accepted Submissions', and 'Create/Edit Linked Submission Groups'.

The Go to Submission Action Link is now displayed to Editors (who are not blinded to a submission) on both the *Linked Submissions for Manuscript* page and the *Edit Linked Submission Group* page (for Active Linked Submission Groups only) when:

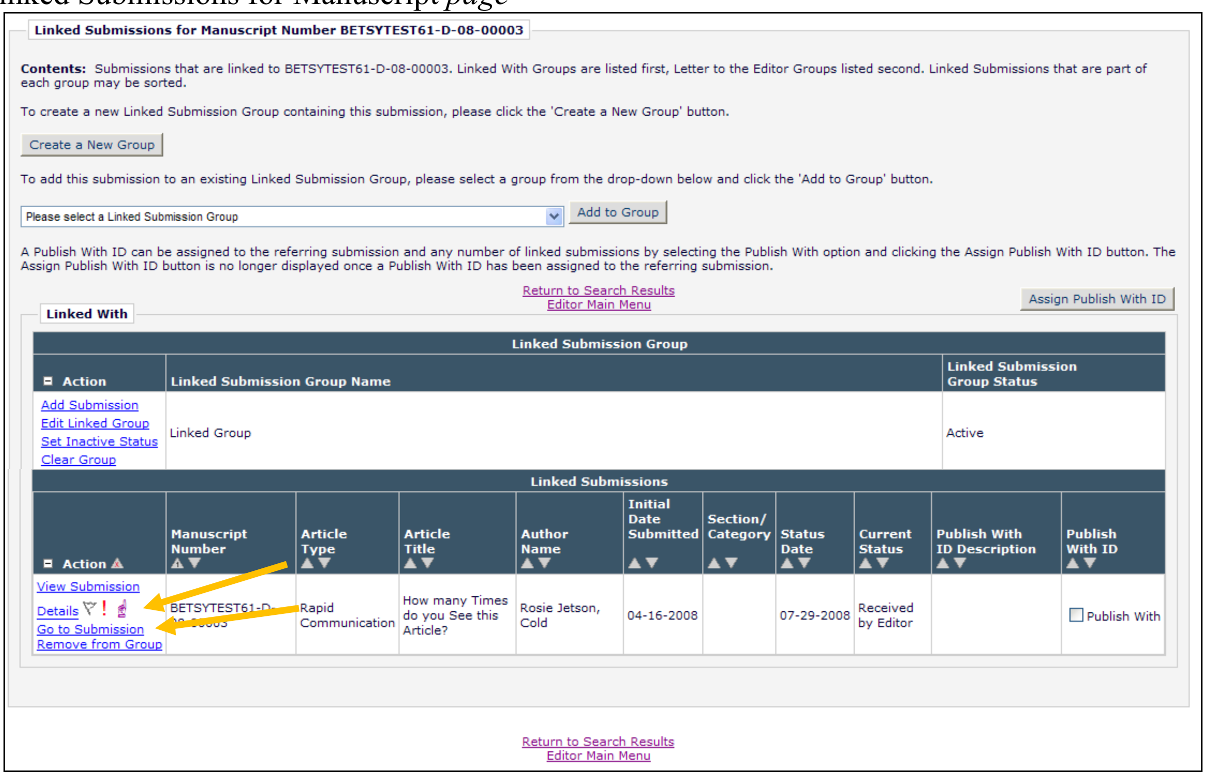
- The Editor has a pending assignment for the current revision and has 'View Linked Submission Groups' permission enabled,
  OR
  The Editor has both 'View All Submissions' **and** 'Create/Edit Linked Submission Groups' permissions enabled.

NOTE: If the Editor clicks the Go to Submission link to navigate away from this page and has made any changes to the ‘Linked Submission Group Name’ or the ‘Linked Submission Group Type’ without clicking the ‘Submit’ button, the information is not saved.

Edit Linked Submission Group *page*



Linked Submissions for Manuscript *page*



TO CONFIGURE:

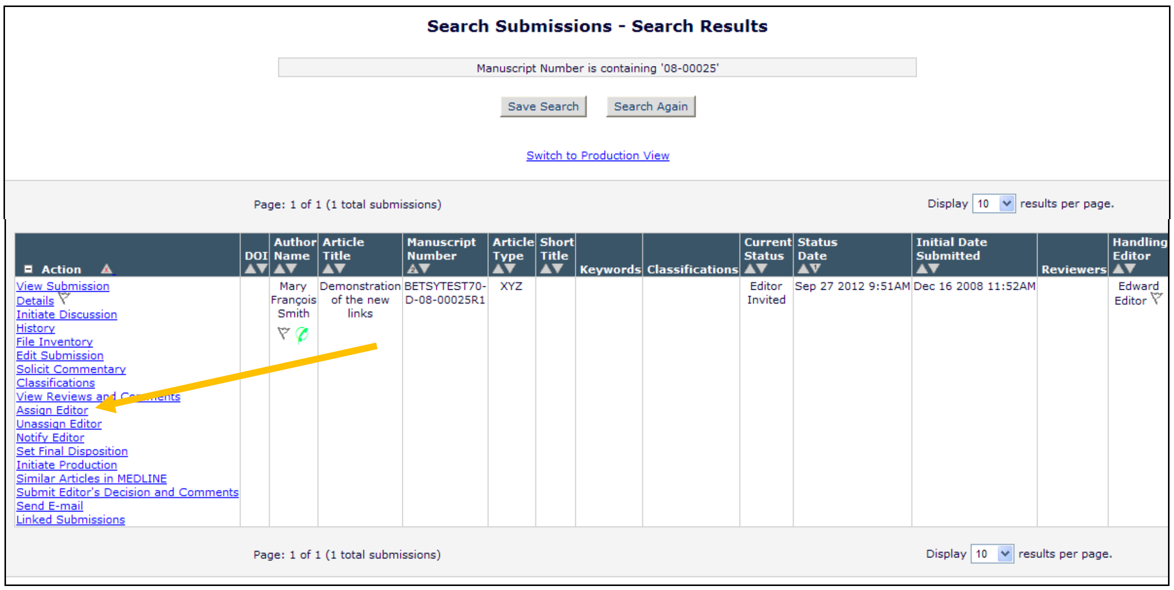
To enable Editor Roles to view the additional Details or Go to Submission links (on appropriate submissions) on the *Linked Submissions for Manuscript* page and the *Edit Linked Submission Group* pages, go to RoleManager, select the Editor Role to have these permissions, and set/check the existing 'View Linked Submission Groups', 'Create/Edit Linked Submission Groups', and/or 'View All Submissions' as appropriate.

To enable Publisher Roles to view the Details link, on the *Linked Submissions for Manuscript* page and the *Edit Linked Submission Group* pages, go to RoleManager, select the Publisher Role to have permission, and select/check the existing permissions 'View Manuscript Details', 'View All Accepted Submissions', and 'Create/Edit Linked Submission Groups'.

Additional Access to Assign Editor (Suggest Editor Feature)

In EM v9.2, publications may be configured to use the 'Suggest Editor' feature, in which Editors are added to an Invitation Queue rather than being invited directly to accept an assignment. When the list of Editors to invite has been exhausted (all Editors have been invited and have either not responded or have declined the invitation), the only way for an Editor to replenish the Editor Queue is by clicking the Assign Editor link. This link has not been available for these submissions via Search Submissions.

New in EM v10.0, the Assign Editor link is now also displayed in *Search Submissions Results* for any submissions where the logged in Editor has the 'Assign Editor Using Suggested Editor Queue' permission, and the submission has an open Suggest Editor Queue (no Editor has accepted an invitation to take the assignment).



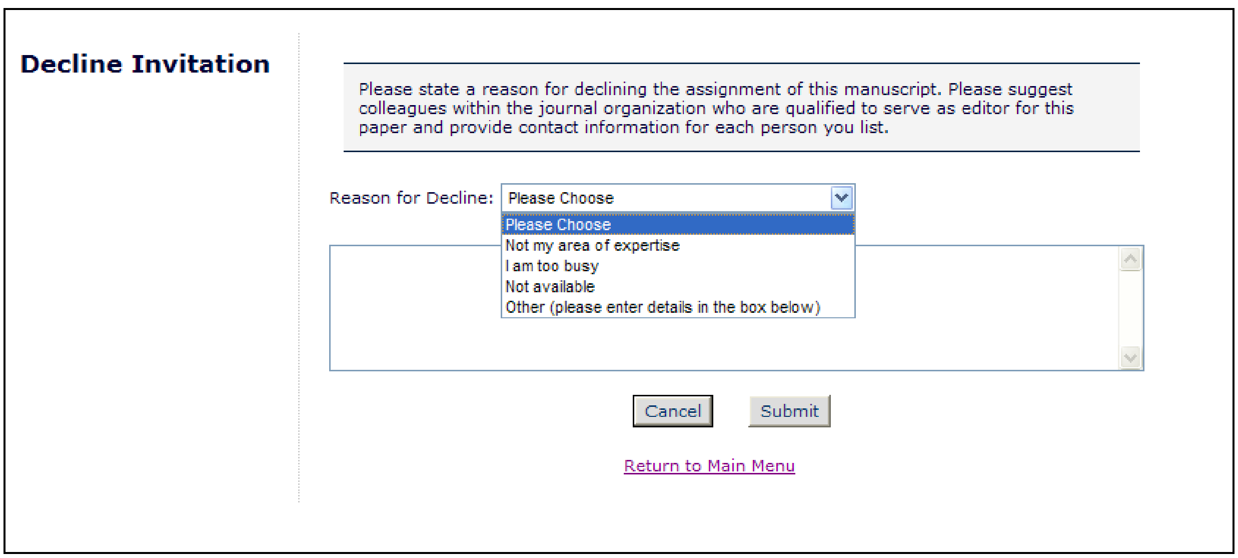
TO CONFIGURE:

No additional configuration required. Publications configured to use Suggest Editor will now have this link available when there is an open Queue, and the logged in Editor has the 'Assign Editor Using Suggested Editor Queue' permission enabled.

Enhanced Editor Decline Functionality (Suggest Editor Feature)

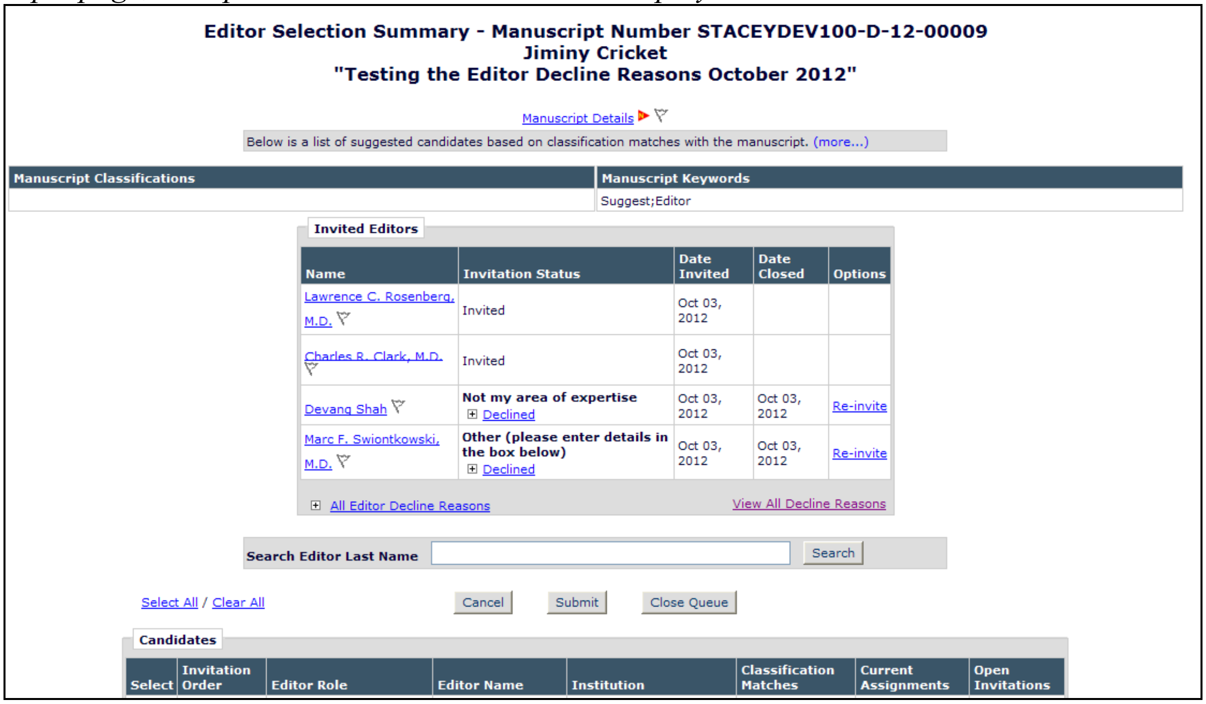
In EM v9.2, Publications may be configured to use the 'Suggest Editor' method of inviting Editors to handle a submission. When this method is used, a queue of Editors can be created, and Editors are invited automatically until an Editor accepts (or is assigned) to handle a submission. An invited Editor may decline a Suggest Editor invitation by clicking the No I will not take this Assignment link in his *New Invitations* folder on the *Editor Main Menu*, or by clicking the Editor Decline deep link in an e-mail. After clicking the deep link or the Action Link in the folder, the declining Editor is navigated to the *Decline Invitation* page, containing customized instructional text and a free-text notes box in which he may enter his reason for declining, though he is not required to do so. Users (with proper permission) can access the invited Editor's Reason for Decline on both the *Editor Selection Summary* page and *People Information* page if he has entered a reason, but because the reasons are text, the reasons for decline are not standardized.

This feature is enhanced in v10.0 with two new elements. First, Publications may now create a list of pre-configured Reasons for Decline. The invited Editor can be asked to select a reason from a pre-configured drop-down list when declining the invitation. The publication determines whether selecting a Reason for Decline from the drop-down is required or optional. The existing free text notes box on the *Decline Invitation* page is retained, and entering text into this box remains optional.



When Editors have declined the invitation to handle a submission, Editors now have many ways to view the Decline reasons. For each Editor that has declined to handle a submission, the 'Invited Editors' grid on the *Editor Selection Summary* page includes the Declined reason. If the Editors have chosen a reason from the drop-down menu, the selected Reason is displayed in bold, with a Declined link beneath that, when clicked, will expand to display the text of the Editor's additional reason (if he entered more information). If the Editor did not provide a Reason, the text 'Declined' is displayed, but not as a link. Additionally, an All Editor Decline Reasons link is displayed directly below the 'Invited Editors' grid that will expand/collapse all Editor Declined reasons.

Sample page; collapsed Editor Declined Reasons displayed:



Closer view; Declined reasons are expanded:

Additionally, the 'Invited Editors' grid has a new hyperlink at the bottom called View All Decline Reasons. Clicking this link opens a pop-up window displaying all Declined Editors and Reasons for the current revision of the submission. The default sort order of this page is by the 'Date Invited' column in ascending order, though the results may be sorted by 'Editor Name', 'Date Declined', or 'Decline Reason' as well.

All Editor Decline Reasons for Manuscript Number: STACEYDEV100-D-12-00009
Jiminy Cricket
"Testing the Editor Decline Reasons October 2012"

Close

Editor Decline Reasons

Editor Name	Date Invited	Date Declined	Decline Reason	Decline Reason Explanation
Devang Shah	Oct 03, 2012	Oct 03, 2012	Not my area of expertise	Keep me in mind for the next go 'round, yeah?
Marc F. Swiontkowski, M.D.	Oct 03, 2012	Oct 03, 2012	Other (please enter details in the box below)	Thank you for the invitation - but I am distantly related to the Author and feel I should sit this one out!
Charles R. Clark, M.D.	Oct 03, 2012	Oct 04, 2012	I am too busy	Ask me again after the new year.

Close

A new merge field is included in v10.0 called **%SUGGEST_EDITOR_DECLINE_REASON%**. This merge field can be used in letters triggered by either the 'Editor Declines Invitation from an Editor' or 'Editor Declines Invitation of New Submission' ActionManager events. The **%SUGGEST_EDITOR_DECLINE_REASON%** pulls in the Reason selected from the drop-down (if one is chosen) and any text entered by the Editor on Declining the Invitation.

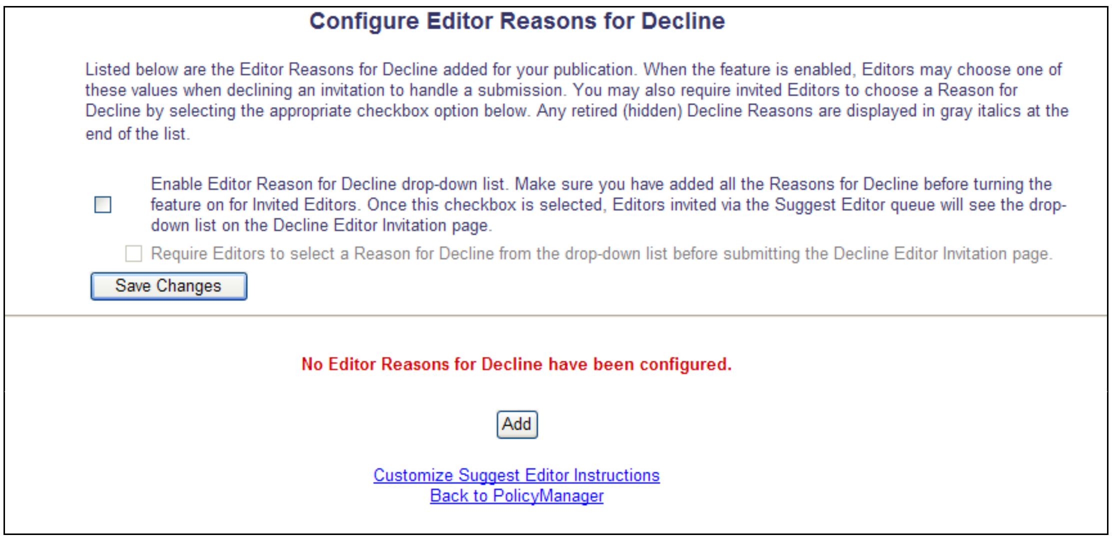
NOTE: This merge field is not available for use in "traditional" invitations, only Suggest Editor Invitations.

TO CONFIGURE:
To create a list of Reasons for Decline to be provided to Editors, go to PolicyManager, Suggest Editor Policies, and click the new Configure Editor Reasons for Decline link.

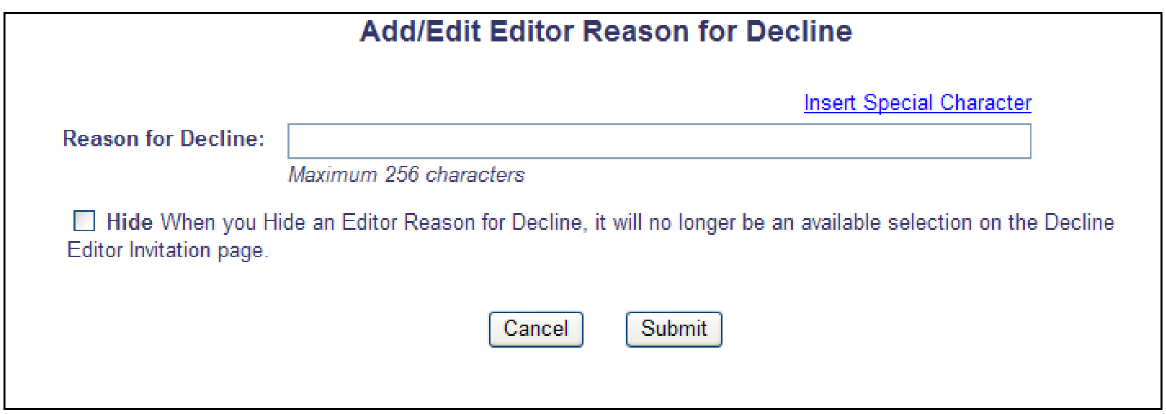
The *Configure Editor Reasons for Decline* page has two sections. The upper section is where the Administrator decides whether or not to use the 'Editor Reason for Decline' drop-down list by selecting/checking the checkbox. NOTE: Once this feature is enabled, all Declining Editors (invited via the Suggest Editor queue) will see the drop-down. It is recommended that you set up your list of Decline Reasons before enabling the feature.

When the feature is enabled, a sub-option is available for selection where the Administrator may Require Declining Editors to select an option from the 'Reason for Decline' drop-down list.

To add a new Reason to the list, click the Add button in the lower part of the page.



Clicking the 'Add' button navigates the Administrator to the new *Add/Edit Editor Reason for Decline* page. Decline Reasons may be up to 256 characters in length. When you are done, click the 'Submit' button to add the reason to the list of available Decline Reasons.



Once you have entered your Decline Reasons, they are listed on the main *Configure Editor Reasons for Decline* page. The order in which the Reasons display in the drop-down presented to Declining Editors may be updated by entering numbers in the fields in the 'Order' column and clicking the 'Update Item Order' button. Click the Edit link next to a Reason to edit an option. The Remove option can be used for any Reason that hasn't been used as a Reason by a Declining Editor.

Partial page display:

To use the new merge field, go to PolicyManager, Edit Letters, and edit an existing letter in the "Invite/Assign/Unassign Editor" Letter Family or add a new letter to that Letter Family. Include the new **%SUGGEST_EDITOR_DECLINE_REASON%** merge field. Then go to ActionManager, Editor Roles, and select the letter in the appropriate event(s).

Notify Author Refinements

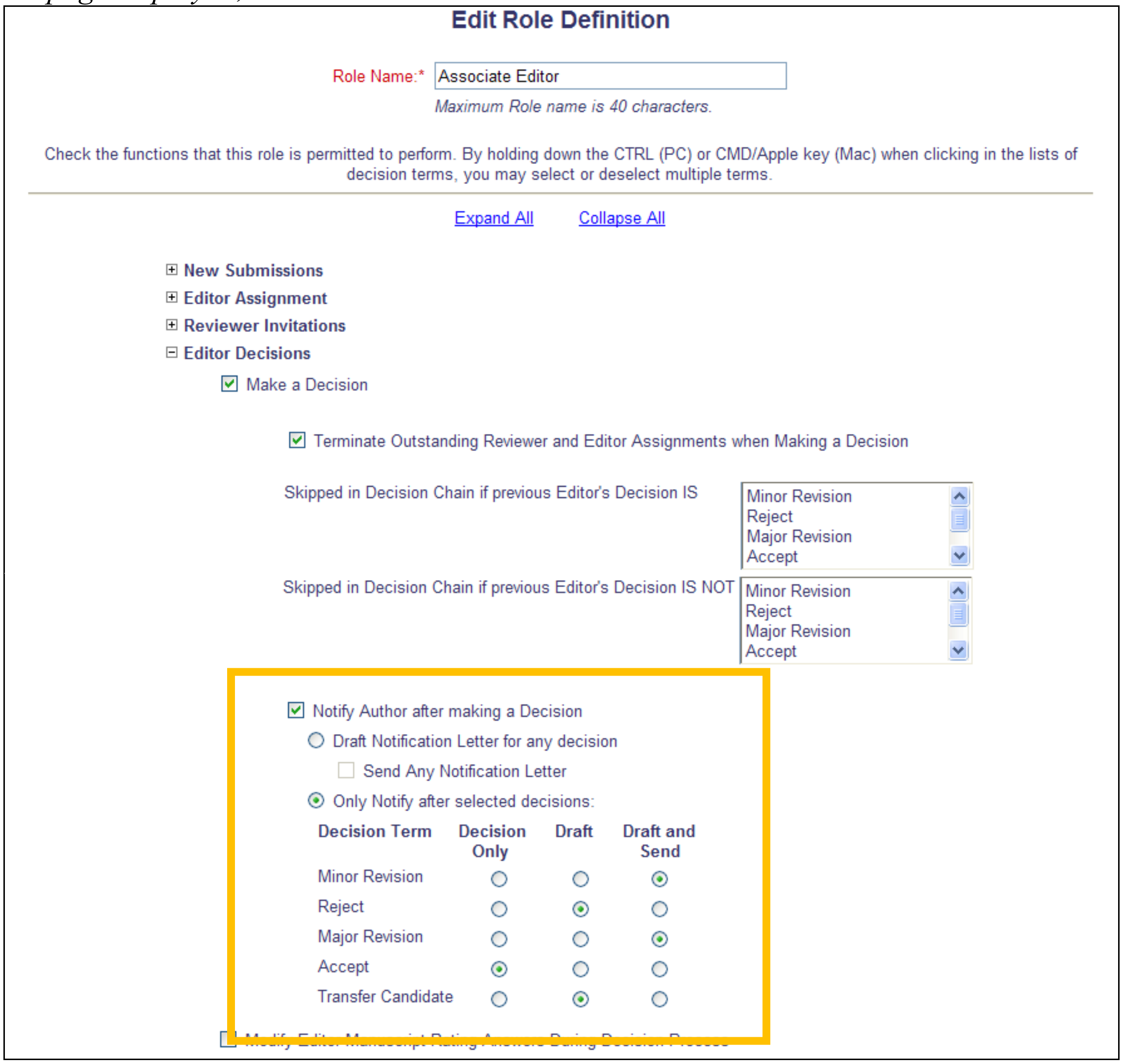
In EM v9.2, Publications may configure Editor Roles with permission to notify the Author after making a decision on a submission. This permission can be allowed for all Decision terms or only selected Decision terms. Editors may be further restricted to be able to only Draft a letter, requiring a higher level Editor to review and send the actual Author Notification letter.

Some publications have scenarios where certain Editor Roles are allowed to render an 'Accept' or 'Revise' decision on a submission and notify the Author without intervention from the Editorial staff, but those same Editor Roles are not allowed to notify an Author when they have made a 'Reject' decision (for example). New in EM v10.0, the Editor Decision and Notify Author permissions are enhanced with additional granularity by giving each decision term its own 'Decision Only', 'Draft' or 'Draft and Send' setting under RoleManager. This allows an Editor to Draft for all Decision Terms, Send for all Decision Terms, or only draft the decision letter for some terms, send the notification for other decision terms, or never enter the Notification workflow for still others.

TO CONFIGURE:
To take advantage of the new feature, go to RoleManager, Editor Role, and select the desired role and click the Edit link. On the *Role Definition* page, scroll to the 'Editor Decisions' section. When an Editor role has 'Make a Decision' permission enabled, they may also be given the 'Notify Author after making a Decision' permission. When this permission is enabled, one of the two sub-permission radio buttons must be selected:

- Draft Notification letter for any decision – when selected, the Editor will always be brought to the *Notify Author* page upon submitting a decision. The Editor will have the ability to Draft the letter and submit this with his decision to a higher level Editor for review and delivery.
  - A sub-permission of this Radio Button is 'Send any Notification Letter'. When this sub-permission is enabled, the Editor will be able to send the Author Notification letter, or submit a draft with his decision to a higher level Editor.
- Only Notify after selected decisions – when this radio button is selected, the Administrator may choose options for each configured Decision term. For each Term, this Editor Role may be given one of the following options:
  - Decision Only – when selected for this term, the Editor will be able to submit a decision, but she will not be brought to the *Notify Author* page at any point in the decision process.
  - Draft – when selected for this term, the Editor will be able to submit a Draft version of the Author Notification letter. If a prior Editor in the chain saves a draft, this Editor will be able to make additional edits and submit the edited draft up to a higher level Editor for review and delivery.
  - Draft and Send – when selected for this term, the Editor will be able to either submit a draft Author Notification letter to a higher level Editor when this decision term is selected, or draft and send the letter to the Author with his decision.

Partial page displayed; Editor Role Definition:



On upgrade to v10.0:

- The 'Draft Notification Letter for any decision' radio button is selected for all Editor Roles with the existing 'Notify after any Decision' radio button selected AND the existing 'Only draft the Notification (another Editor must ratify and send)' checkbox selected.
- The 'Send any Notification Letter' checkbox is selected for all Editor Roles with the existing 'Notify after any Decision' radio button selected.
- If the existing 'Only draft the Notification (another Editor must ratify and send)' checkbox is selected/checked and the 'Only Notify after a Decision of:' radio button is selected, then the 'Decision Only' option is selected for any terms that were NOT previously selected.
- If the existing 'Only draft the Notification (another Editor must ratify and send)' checkbox is selected/checked and the 'Only Notify after a Decision of:' radio button is selected, then the new 'Draft' option is selected for any decision terms that WERE previously selected.

- If the existing ‘Only draft the Notification (another Editor must ratify and send)’ checkbox is NOT selected/checked and the ‘Only Notify after a Decision of:’ radio button is selected, then the new ‘Draft and Send’ option is selected for any selected decision term.

Automatically Add External Correspondence

In EM/PM v9.2, notifications are sent to users via e-mail letters generated at various points in the workflow. Letters may be configured to be sent "from" different options as configured on letter templates, such as from the Corresponding Editor or from the Publication configured default E-mail. When a letter recipient replies to an e-mail, the reply is sent to the e-mail address of the configured "sender", but that communication occurs outside of the EM/PM system. Editors may be given permission to add External Correspondence to the system, allowing the user to manually add correspondence to the Submission History.

New in v10.0, publications may set up a "drop box" e-mail address in their publication, creating an e-mail address where users may send responses to EM-generated e-mail messages to be automatically inserted into History for a submission as if the Editor had used the existing 'Add External Correspondence' functionality.

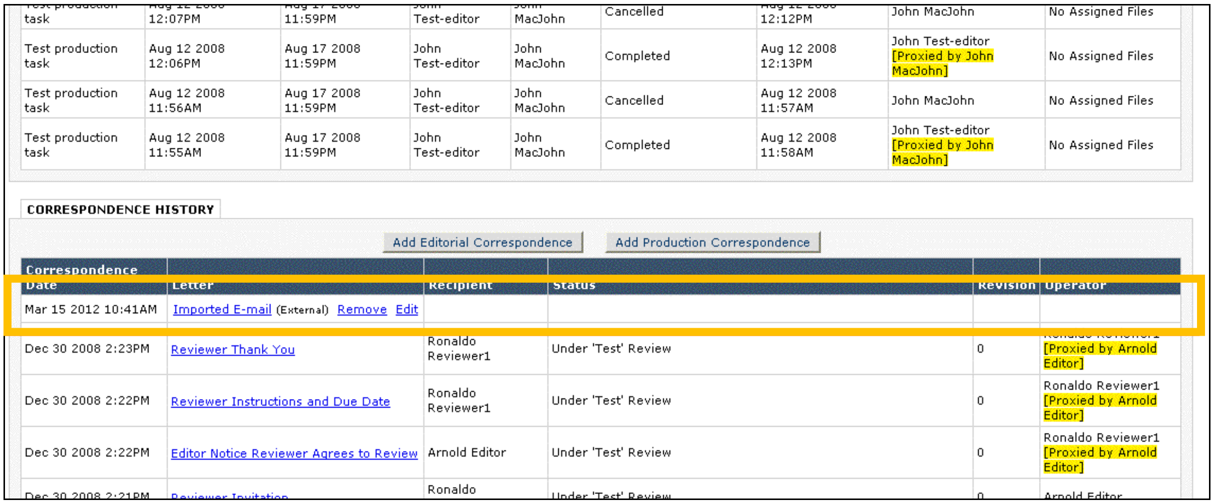
Once the publication is configured with this new "drop box", then any letter that is sent out from the system has an identifier code appended to the Subject of the e-mail. Any responses to this outgoing e-mail will normally retain this identifier in the subject line. Replies to that e-mail can be forwarded to the publication's "drop-box" e-mail address, and the identifier code can be used by EM/PM to determine which submission this letter should be associated with.

Only e-mail messages that contain a valid identifier code generated by EM can be imported. EM identifier codes have the standard form [EMID: xxxxxxxxxxxxxxxx]. Incoming e-mail messages are imported into the same submission's Correspondence History as the original e-mail sent from EM.

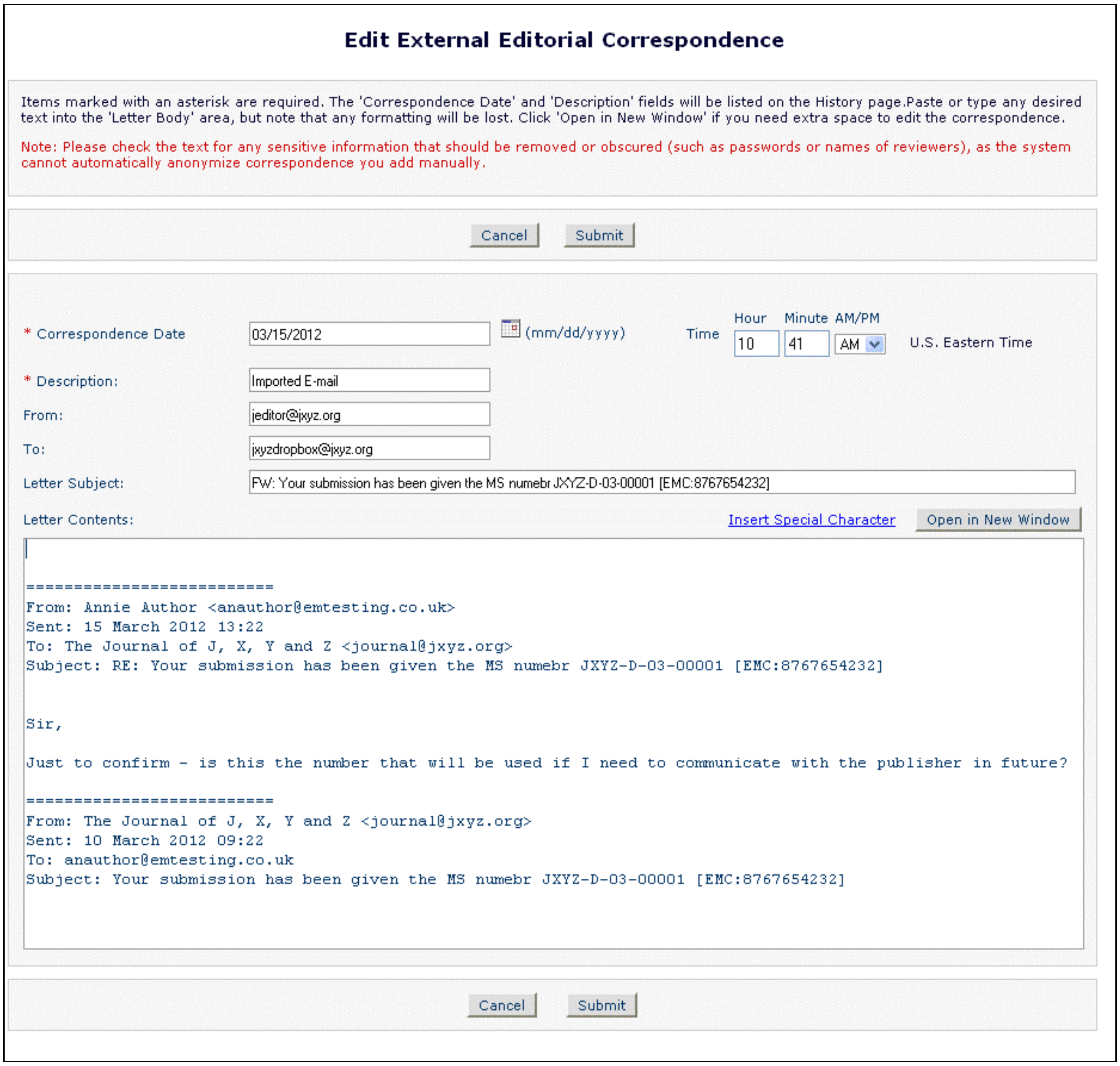
NOTE: E-mail messages cannot be automatically imported without an identifier code, but these messages can still be manually added using the Add External Correspondence functionality.

NOTE: For security reasons, the Identifier Code is not appended to subject lines of letters containing %USERNAME% or %PASSWORD% merge fields.

When an Editor receives a letter (with a valid EM e-mail identifier in the subject line) that she wants to add to a submission's Correspondence History, and she has the Drop Box E-mail Address, she can forward the e-mail to the Drop Box E-mail Address. When the letter is successfully imported into EM, the e-mail is added to the Correspondence History of the submission from which the original e-mail was sent, as if the Editor had manually added the external correspondence.



The information is further parsed on the *Edit External Correspondence* page.


Edit External Editorial Correspondence

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

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

Cancel Submit

* Correspondence Date: 03/15/2012 (mm/dd/yyyy) Time Hour 10 Minute 41 AM/PM AM U.S. Eastern Time

* Description: Imported E-mail

From: jeditor@jxyz.org

To: jxyzdropbox@jxyz.org

Letter Subject: FW: Your submission has been given the MS numebr JXYZ-D-03-00001 [EMC:8767654232]

Letter Contents: Insert Special Character Open in New Window

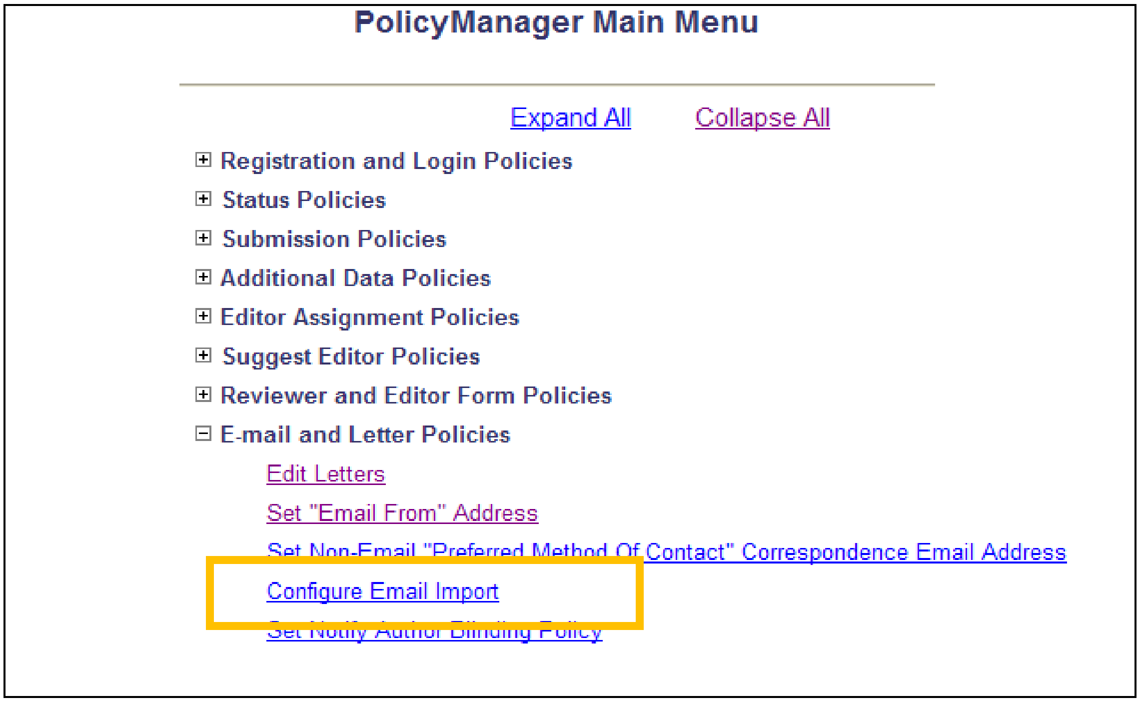
```
==========================
From: Annie Author &lt;anauthor@emtesting.co.uk&gt;
Sent: 15 March 2012 13:22
To: The Journal of J, X, Y and Z &lt;journal@jxyz.org&gt;
Subject: RE: Your submission has been given the MS numebr JXYZ-D-03-00001 [EMC:8767654232]


Sir,

Just to confirm - is this the number that will be used if I need to communicate with the publisher in future?

==========================
From: The Journal of J, X, Y and Z &lt;journal@jxyz.org&gt;
Sent: 10 March 2012 09:22
To: anauthor@emtesting.co.uk
Subject: Your submission has been given the MS numebr JXYZ-D-03-00001 [EMC:8767654232]
```

Cancel Submit

If the letter forwarded to the drop-box contains attachments, these are run through a virus-scanner and uploaded as attachments to the letter.

NOTE: If multiple e-mail messages are contained within one letter (as attachments), these will not be parsed into individual messages, but rather added as attachments to the main letter.

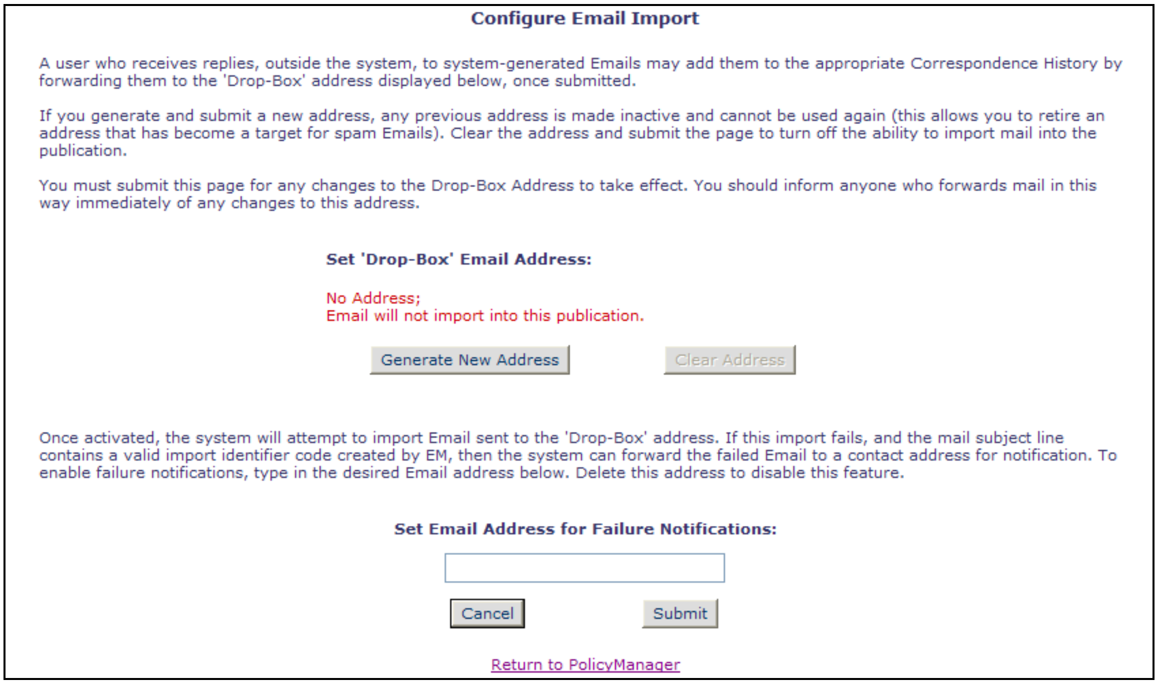
TO CONFIGURE:
To configure a new Drop Box for your site, go to PolicyManager, and click the new Configure Email Import link located in the 'E-mail and Letter Policies' section.



On the *Configure Email Import* page, click the ‘Generate New Address’ button to have the system create the e-mail address to be used for sending e-mail to the system ‘Drop Box’.

NOTE: Only one drop-box address is active at a time for a publication. If the address needs to be changed for any reason, the system administrator of the publication must click the ‘Clear Address’ button first, then ‘Generate New Address’.

NOTE: Drop-box addresses stop working as soon as they are cleared; only the currently active drop-box address can be used to import e-mail messages. You should warn all Editors before generating a new address, and ask them not to import any e-mail messages until you send them the new drop-box address.


Configure Email Import

A user who receives replies, outside the system, to system-generated Emails may add them to the appropriate Correspondence History by forwarding them to the 'Drop-Box' address displayed below, once submitted.

If you generate and submit a new address, any previous address is made inactive and cannot be used again (this allows you to retire an address that has become a target for spam Emails). Clear the address and submit the page to turn off the ability to import mail into the publication.

You must submit this page for any changes to the Drop-Box Address to take effect. You should inform anyone who forwards mail in this way immediately of any changes to this address.

Set 'Drop-Box' Email Address:

No Address;
Email will not import into this publication.

Generate New Address   Clear Address

Once activated, the system will attempt to import Email sent to the 'Drop-Box' address. If this import fails, and the mail subject line contains a valid import identifier code created by EM, then the system can forward the failed Email to a contact address for notification. To enable failure notifications, type in the desired Email address below. Delete this address to disable this feature.

Set Email Address for Failure Notifications:

Cancel   Submit

Return to PolicyManager

Once a Drop-Box Email Address has been created, authorized users (such as Editors) can forward e-mail messages to that address for importing into the system.

NOTE: It is recommended that you do NOT circulate the drop-box address to people outside of your Editorial team to decrease the chance of spam being directed to this address.

An e-mail address may be added to receive notices in the event an e-mail fails to be uploaded successfully.


Configure Email Import

A user who receives replies, outside the system, to system-generated Emails may add them to the appropriate Correspondence History by forwarding them to the 'Drop-Box' address displayed below, once submitted.

If you generate and submit a new address, any previous address is made inactive and cannot be used again (this allows you to retire an address that has become a target for spam Emails). Clear the address and submit the page to turn off the ability to import mail into the publication.

You must submit this page for any changes to the Drop-Box Address to take effect. You should inform anyone who forwards mail in this way immediately of any changes to this address.

Set 'Drop-Box' Email Address:

emdev.betsydev100-eb34e5c83ee7219c@editorialmanager.com

Generate New Address   Clear Address

Once activated, the system will attempt to import Email sent to the 'Drop-Box' address. If this import fails, and the mail subject line contains a valid import identifier code created by EM, then the system can forward the failed Email to a contact address for notification. To enable failure notifications, type in the desired Email address below. Delete this address to disable this feature.

Set Email Address for Failure Notifications:

Cancel   Submit

Return to PolicyManager

Transfer Submissions to Non-Editorial Manager Systems

In EM v9.2, publications may be configured to transfer submissions between EM-publications using the Transfer Submissions feature. Some publications would like a method of transferring submissions to non-Editorial Manager systems.

New in EM v10.0, publications may now configure sites to use the Transfer Submissions feature to pass submissions to non-EM systems via FTP. Publications wishing to use the Transfer Submission feature must first enable the feature in AdminManager on the *Configure Cross-Publication Submission Transfer* page. Once this feature is enabled, Editors can transfer a submission by setting the Final Disposition to "Transfer" and selecting a recipient publication from a list of configured publications.

NOTE: This Final Disposition option is only available if there are no open assignments associated with the submission (including Reviewer or Editor assignments, Author invitations, or if production has been initiated).

When a publication enables the transfer to a non-EM publication feature, Publications may choose to include Reviewer Information as part of the transferred package of information. Review Forms must be configured to allow Reviewers who have submitted a review to agree or decline to transfer their identifying information or review, or agree to publish their review, at the time they submit their review for the current version of the submission. There are three (3) Review Questions that can be included on Review Forms that are presented to Reviewers at the time of their review:

1. If this submission is transferred to another publication, do we have your consent to include your identifying information?
2. If this submission is transferred to another publication, do we have your consent to include your review?
3. If this submission is transferred to another publication with "Open Peer Review", do we have your consent to publish your review in a pre-publication history?

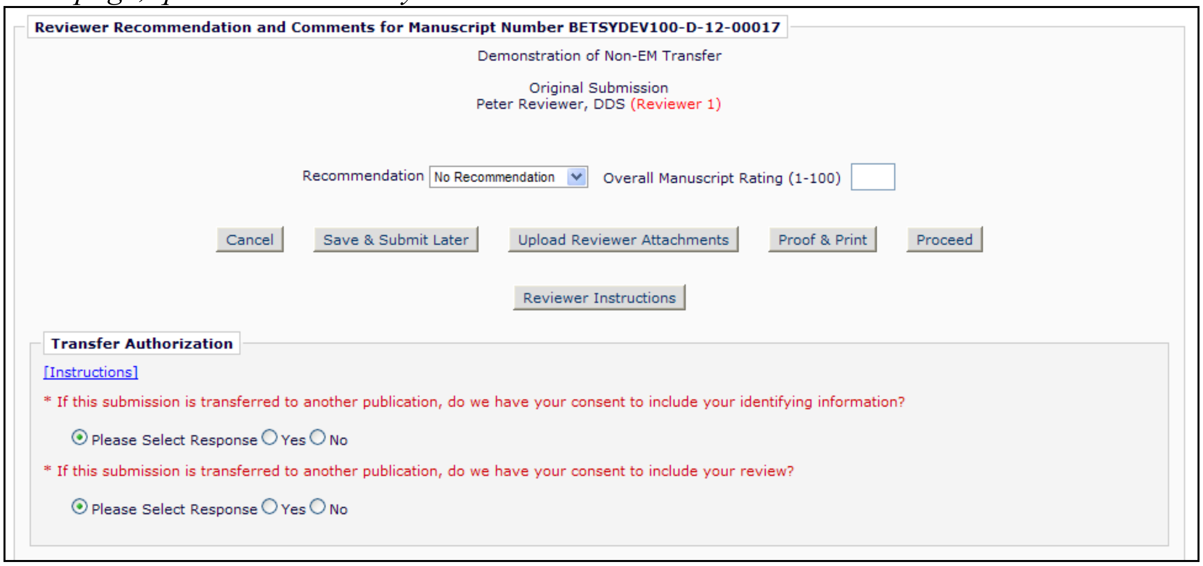
If Reviewers answer 'No' to any questions, or if the Reviewers are not asked these questions at all, then some or all of their Review information will not be transferred with the submission to the non-EM publication.

NOTE: Reviews are never transferred with an EM-to-EM Submission Transfer, although the %DECISION_LETTER% merge field may be included in the Transfer Letter that is automatically sent to receiving EM sites, and the Decision Letter itself may include Reviewer information.

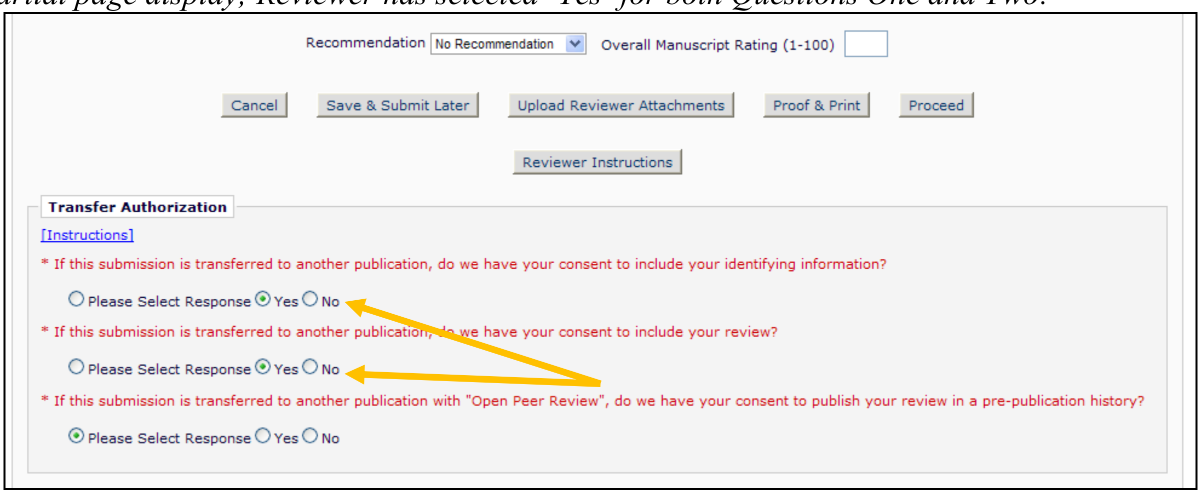
When a Review Form is configured to ask one or more of these Transfer Questions, the information displays on the *Submit Recommendation and Comments* page (the order of the section with regard to the other sections of the Form may be configured on the Review Form). NOTE: The third question is displayed only when 'Yes' is selected as the answer for both of the other two questions.

The instructions are available by clicking the Instructions link above the questions.

Partial page; questions have not yet been answered:



Partial page display; Reviewer has selected 'Yes' for both Questions One and Two:



When a submission is transferred to a non-EM publication, a Zip file is sent to the designated FTP server containing:

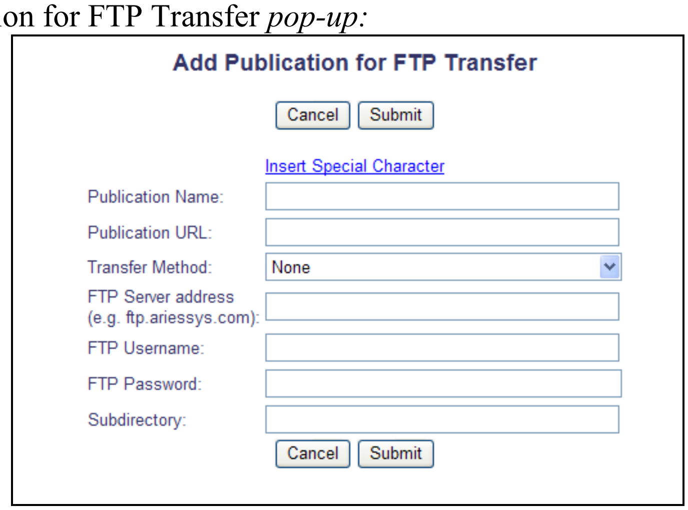
1. An XML file containing:
   - Submission metadata
   - All Reviews where the Reviewer consented to the transfer by selecting 'Yes' on the question "If this submission is transferred to another publication, do we have your consent to include your review?"
   - Reviewer Identifying Information, if the Reviewer consented (on the highest revision level of the submission for which he or she submitted a review) by selecting 'Yes' on the question "If this submission is transferred to another publication, do we have your consent to include your identifying information?"
2. All submission items for all versions of the submission
3. The Submission PDF for all versions of the submission

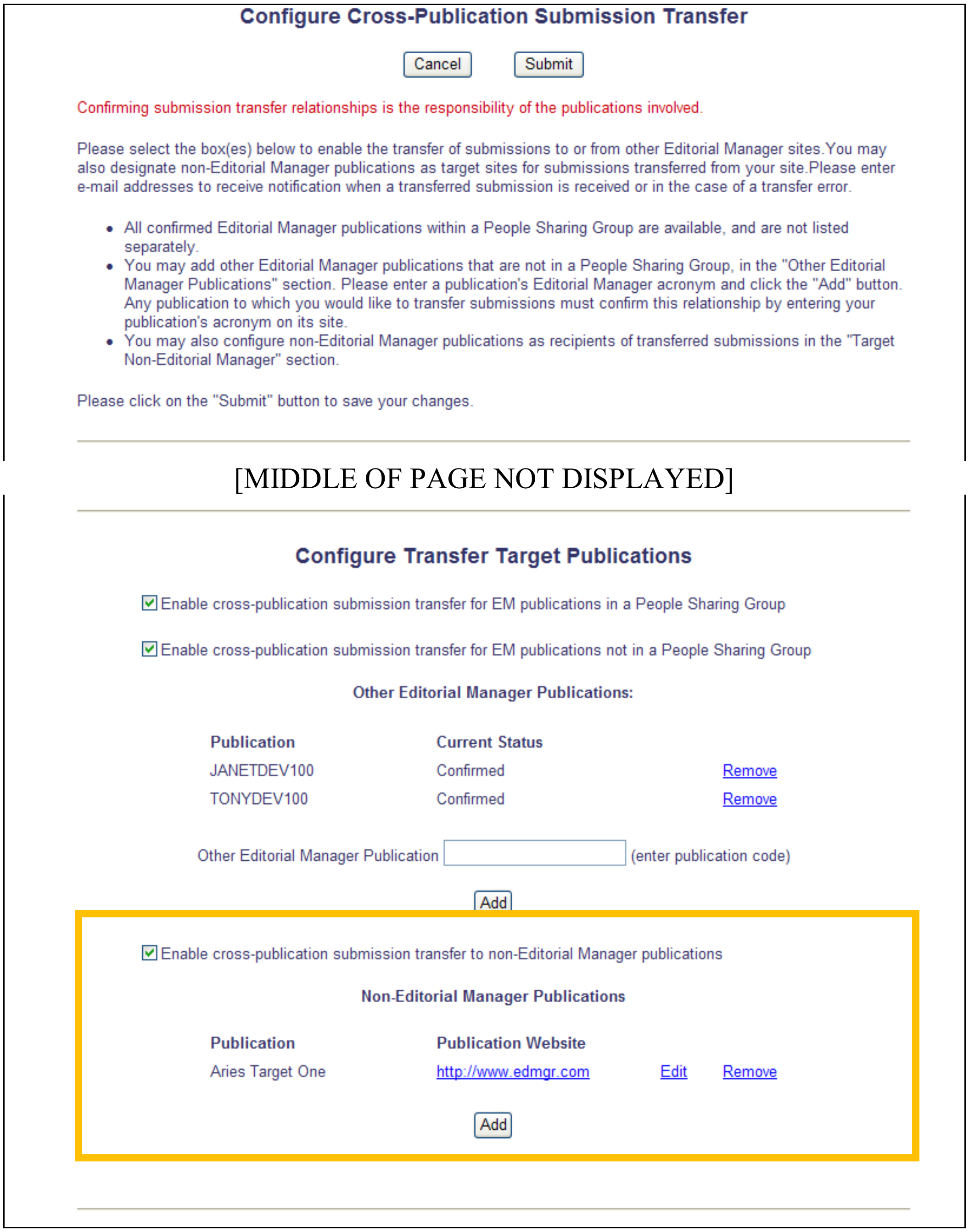
If the transfer is successful, the sending publication will see transfer information on the *Details* page for the submission. The “Transferred” Final Disposition Term will display, and a ‘Transfer Information’ section will display at the bottom (on the default Editorial Detail layout) containing the name of the publication to which the submission was transferred. The submission now displays in the ‘All Submissions with Final Disposition: Transfer’ folder on the *Editor Main Menu*.

TO CONFIGURE:
To enable the submission transfer feature from your publication to a non-EM system, go to AdminManager, Configure Cross-Publication Submission Transfer, and select/check the box labeled ‘Enable cross-publication submission transfer to non-Editorial Manager publications’. Click the ‘Add’ button in this section to open the *Add Publication for FTP Transfer* page where you can add the following required information for the destination site:

- **Publication Name** - Enter the Journal Title/Publication Name of the target publication (maximum length is 256 characters). NOTE: When the name is displayed on the page, it is truncated after 120 characters followed by ellipses.
- **Publication URL** - Enter the target publication’s web site. This must be a complete URL, e.g. http://www.target_site.com.
- **Transfer Method** - Select the desired transfer method. Options include those that have been developed for non-EM submission transfers.
- **FTP Server address** - Enter the FTP site for the target publication. This must be a well-formed host name, and cannot contain any slashes, e.g. cannot begin with “ftp://”.
- **FTP Username** - Enter the username required to access the designated FTP server
- **FTP Password** - Enter the password required to access the designated FTP server
- **Subdirectory** - Enter the subdirectory on the ftp server of the target publication

Sample Add Publication for FTP Transfer *pop-up:*




Configure Cross-Publication Submission Transfer

Cancel Submit

Confirming submission transfer relationships is the responsibility of the publications involved.

Please select the box(es) below to enable the transfer of submissions to or from other Editorial Manager sites.You may also designate non-Editorial Manager publications as target sites for submissions transferred from your site.Please enter e-mail addresses to receive notification when a transferred submission is received or in the case of a transfer error.

- All confirmed Editorial Manager publications within a People Sharing Group are available, and are not listed separately.
- You may add other Editorial Manager publications that are not in a People Sharing Group, in the "Other Editorial Manager Publications" section. Please enter a publication's Editorial Manager acronym and click the "Add" button. Any publication to which you would like to transfer submissions must confirm this relationship by entering your publication's acronym on its site.
- You may also configure non-Editorial Manager publications as recipients of transferred submissions in the "Target Non-Editorial Manager" section.

Please click on the "Submit" button to save your changes.

[MIDDLE OF PAGE NOT DISPLAYED]

Configure Transfer Target Publications

☑ Enable cross-publication submission transfer for EM publications in a People Sharing Group

☑ Enable cross-publication submission transfer for EM publications not in a People Sharing Group

Other Editorial Manager Publications:

Publication	Current Status	
JANETDEV100	Confirmed	Remove
TONYDEV100	Confirmed	Remove

Other Editorial Manager Publication (enter publication code)

Add

☑ Enable cross-publication submission transfer to non-Editorial Manager publications

Non-Editorial Manager Publications

Publication	Publication Website		
Aries Target One	http://www.edmgr.com	Edit	Remove

Add

To configure a Review Form to display one or all of the Transfer Questions, go to PolicyManager, Create/Edit Review Forms, and Edit an existing form or Add a new form. When at least one non-EM publication has been added to the *Configure Cross-Publication Submission Transfer* page, then a new section displays on the *Add/Edit Review Form* page called 'Authorization to Transfer Review'. Three questions are available for inclusion on the Review Form:

- If this submission is transferred to another publication, do we have your consent to include your identifying information?

- If this submission is transferred to another publication, do we have your consent to include your review?
- If this submission is transferred to another publication with "Open Peer Review", do we have your consent to publish your review in a pre-publication history?

NOTE: The ability to select the third question is dependent on both of the other two questions being asked.

The text of the questions may be customized by clicking the Edit Questions link. If you choose to edit the questions, it is important that the basic meaning of the question be retained, as the Reviewer's choice of 'Yes' or 'No' has an impact on functionality in conjunction with a non-EM submission transfer.

Below the questions is a corresponding 'Instructions for Transfer Authorization' section. These instructions will display to Reviewers via an Instructions link on the Review Form above the configured questions.

These Instructions may be customized by clicking the Edit Instructions link. NOTE: These instructions pertain to the transfer-related questions only, and not the general instructions for the Review Form.

Partial page display; new sections on Edit Review Form *page:*

Edit Review Form

Review Form Name: Default Review Form

☐ Hide - When you **Hide** a Reviewer Form, the form will be deactivated (not available for use with any Article Types).

Reviewer Instructions:

☑ **Display Reviewer Instructions in popup** — Insert Special Character

```
The Review Form has two components: Reviewer Instructions and Review Form.  The
Reviewer Instructions are displayed to Reviewers when the 'Reviewer Instructions'
link is clicked on the Submit Reviewer Recommendation and Comments page.

The Review Form is displayed to Reviewers in the 'Reviewer Confidential Comments to
Editor' box on the Submit Reviewer Recommendation and Comments page.
```

Authorization to Transfer Review — Edit Questions

Question	Display on Review Form
If this submission is transferred to another publication, do we have your consent to include your identifying information?	☐
If this submission is transferred to another publication, do we have your consent to include your review?	☐
If this submission is transferred to another publication with "Open Peer Review", do we have your consent to publish your review in a pre-publication history?	☐

Instructions for Transfer Authorization — Edit Instructions

It is possible that this submission may be transferred to another publication at the conclusion of the peer review process. If the submission is transferred, we would like to include your review. We would also like to include your identifying information, so that the other publication can contact you if necessary. If you agree, we may transfer your name, degree(s), position, department, institution, address, phone number and e-mail address. Your review and identifying information will not be transferred unless you give your consent.

[MIDDLE OF PAGE NOT DISPLAYED]

The following sections may be displayed to the Reviewer on the Reviewer Recommendation Page. Please select the order in which you would like them to appear. Note that Manuscript Rating Questions are configured elsewhere and do not appear for revisions. This setting determines where they will display on the Review Form only when applicable.

Order	Review Form Section
1	Reviewer Instructions
2	Authorization to Transfer Review
3	Custom Review Questions
4	Manuscript Rating Questions
5	Comments to Authors and Editors

Update Order

Cancel Submit

Allow Authors to Authorize Transfer and Select Destination

In EM v9.2, publications may be configured to allow the transfer of a submission to another Editorial Manager site. In EM v10.0, this is further extended to allow publications to transfer submissions to non-EM publications. The transfer of a submission typically occurs when an Editor sets a Final Disposition of 'Transfer'. The Author may be notified when a transfer occurs if a letter is configured for the 'Final Disposition – Transfer' event in ActionManager, but she may not be aware of the transfer prior to this notification.

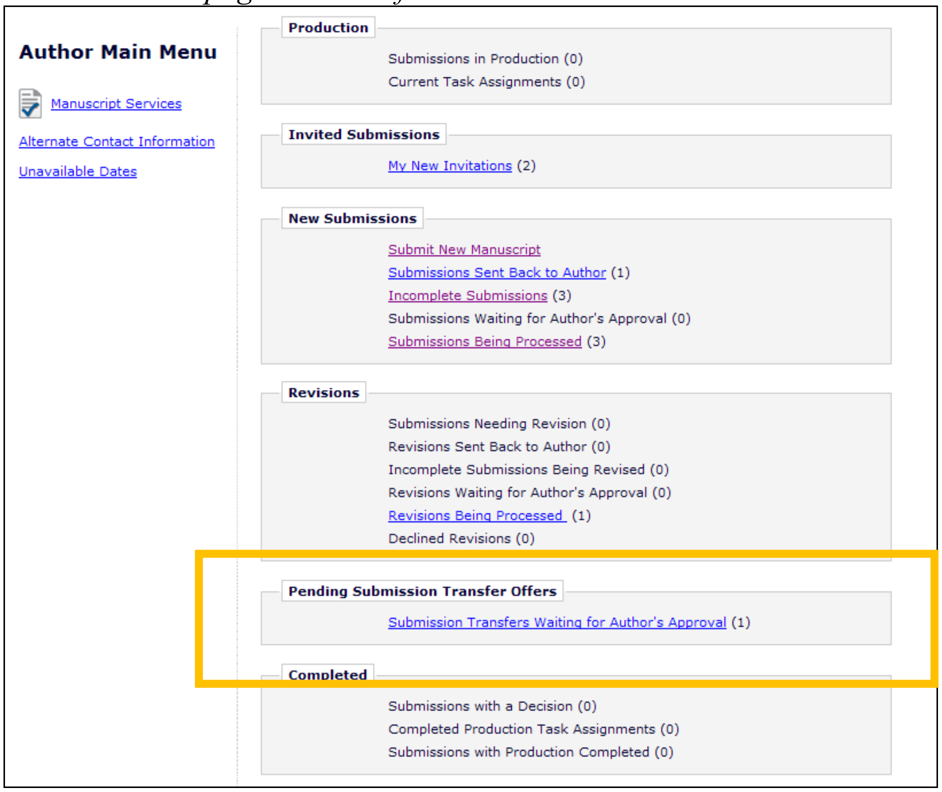
New in EM v10.0, a new "Reject and Transfer" Decision Family is created. This Decision Family has specific functionality associated with it, giving the Corresponding Author the opportunity to Agree to the transfer, or Decline a transfer, resulting in the submission being 'Rejected'. NOTE: Editors may still manually initiate a transfer using the Final Disposition term 'Transfer' even if the Decision term is in the new 'Reject and Transfer' family.

When an Editor makes a Final Decision on a submission of a Decision term in the new "Reject and Transfer" Decision Family, it is recommended that the Decision Letter sent to the Author contain the following new Merge Fields:

- **%AGREE_TO_TRANSFER%** - Generates a deep link that, when clicked, fully logs the Author in and delivers him to the new *Transfer Submission to a Different Publication* page, where he can select the publication to which he wishes to have his paper transferred
- **%DECLINE_TO_TRANSFER%** - Generates a deep link that, when clicked, delivers the Author to the *Decline to Transfer Confirmation* page, and automatically sets the Final Disposition to 'Reject'
- **%TRANSFER_TARGETS%** - Displays a list of all publications to which this submission can be transferred, along with links to these websites. The Author will be able to choose which of these sites she wishes to transfer her submission to when she agrees to the transfer.
- **%TRANSFER_OFFER_EXPIRATION_DATE%** - Displays the date by which an Author must agree to transfer the submission before a Final Disposition of "Reject" is automatically set. This date is calculated at time the Author is notified of the Decision based on the number of days configured on the *Configure Cross-Publication Submission Transfer* page.

When the Author is notified of a Decision in the "Reject and Transfer" Decision family, the Author is given the option to Agree to Transfer, or Decline to Transfer. The Author may do this via Deep Links in the Notify Author letter (the template letter must include the %AGREE_TO_TRANSFER% and %DECLINE_TO_TRANSFER% merge fields), or in the new *Submission Transfers Waiting for Author's Approval* folder. This folder displays in a new 'Pending Submission Transfer Offers' section of the Author's Main Menu.

Sample Author Main Menu *page with new folder:*



Author Main Menu

Manuscript Services

Alternate Contact Information

Unavailable Dates

Production

Submissions in Production (0)
Current Task Assignments (0)

Invited Submissions

My New Invitations (2)

New Submissions

Submit New Manuscript
Submissions Sent Back to Author (1)
Incomplete Submissions (3)
Submissions Waiting for Author's Approval (0)
Submissions Being Processed (3)

Revisions

Submissions Needing Revision (0)
Revisions Sent Back to Author (0)
Incomplete Submissions Being Revised (0)
Revisions Waiting for Author's Approval (0)
Revisions Being Processed (1)
Declined Revisions (0)

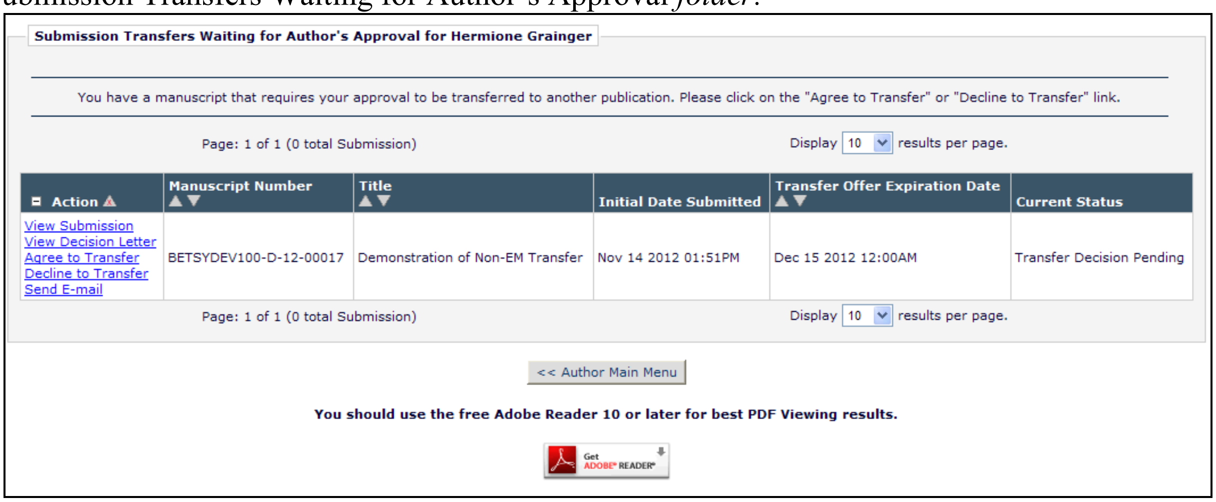
Pending Submission Transfer Offers

Submission Transfers Waiting for Author's Approval (1)

Completed

Submissions with a Decision (0)
Completed Production Task Assignments (0)
Submissions with Production Completed (0)

Submission Transfers Waiting for Author's Approval *folder:*



Submission Transfers Waiting for Author's Approval for Hermione Grainger

You have a manuscript that requires your approval to be transferred to another publication. Please click on the "Agree to Transfer" or "Decline to Transfer" link.

Page: 1 of 1 (0 total Submission) Display 10 results per page.

Action	Manuscript Number	Title	Initial Date Submitted	Transfer Offer Expiration Date	Current Status
View Submission View Decision Letter Agree to Transfer Decline to Transfer Send E-mail	BETSYDEV100-D-12-00017	Demonstration of Non-EM Transfer	Nov 14 2012 01:51PM	Dec 15 2012 12:00AM	Transfer Decision Pending

Page: 1 of 1 (0 total Submission) Display 10 results per page.

<< Author Main Menu

You should use the free Adobe Reader 10 or later for best PDF Viewing results.

Get ADOBE READER

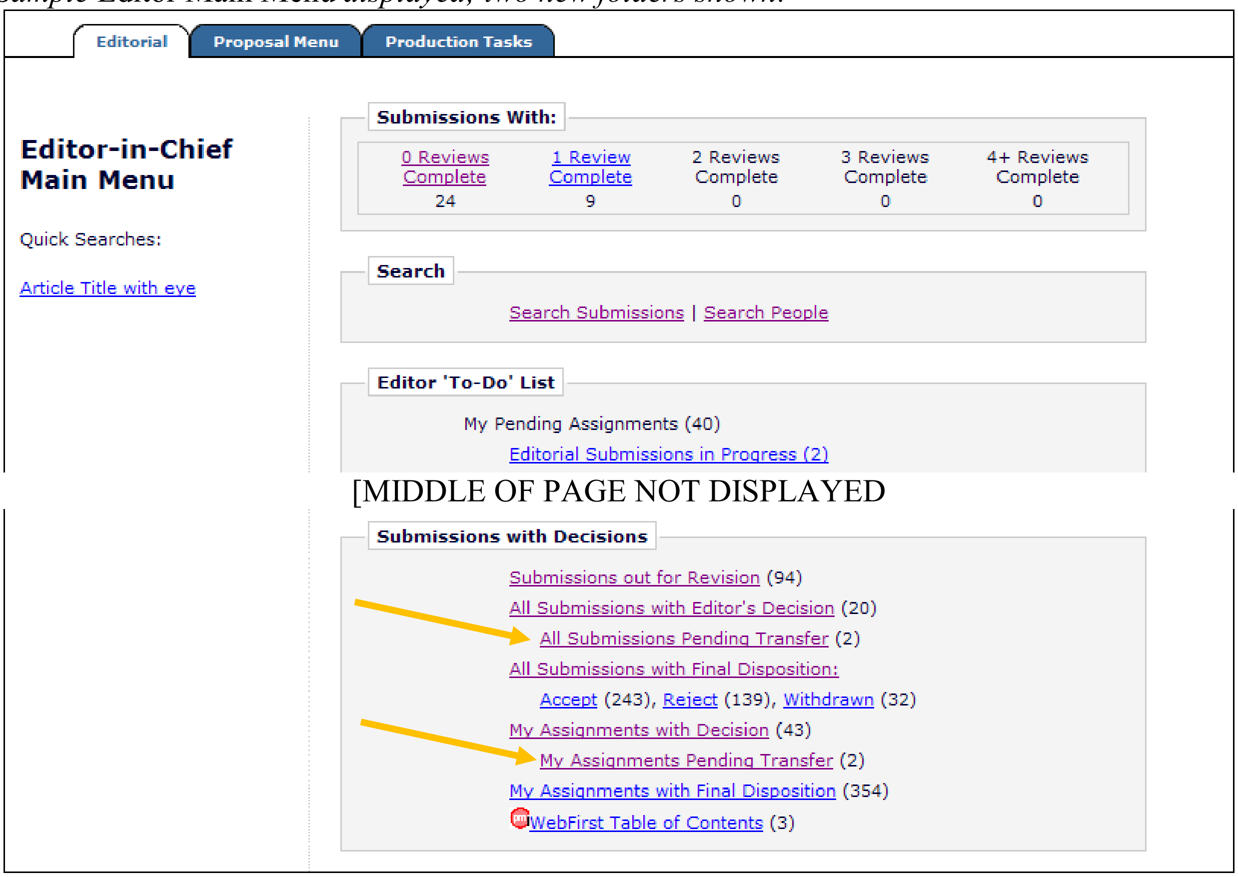
Submissions that are with an Author pending an Author's Transfer Decision are displayed to Editors in one of two folders, located on the Editor's Main Menu.

- **My Assignments Pending Transfer** – This folder, displayed as a sub-folder of the existing 'My Assignments with Decision', contains all submissions on which
    - The logged in Editor has made a Decision

- The Corresponding Author has been notified of a decision in the ‘Reject and Transfer’ Decision Family and has neither Agreed to nor Declined the Transfer option, and
- The ‘Transfer Time Limit’ has not expired

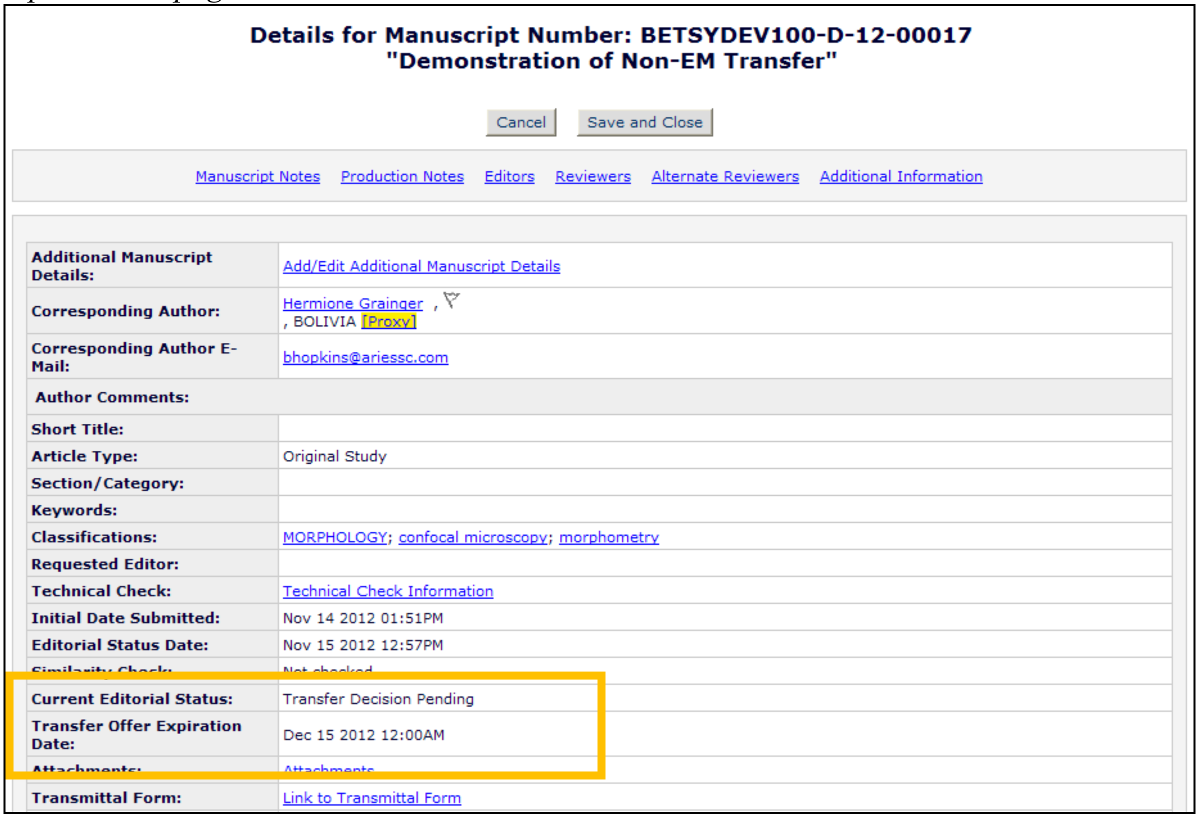
- **All Submissions Pending Transfer** - This folder, displayed as a sub-folder of the existing ‘All Submissions with Editor’s Decision’, contains all submission on which
  - The Corresponding Author has been notified of a decision in the ‘Reject and Transfer’ Decision Family and has neither Agreed to nor Declined the Transfer option, and
  - The ‘Transfer Time Limit’ has not expired

Sample Editor Main Menu *displayed; two new folders shown:*



A new item is added to the default *Editorial Details* page called ‘Transfer Offer Expiration Date’. This row, displayed under the ‘Current Editorial Status’ item, only displays for submissions where the ‘Transfer Time Limit’ has not expired.

Sample Details *page:*



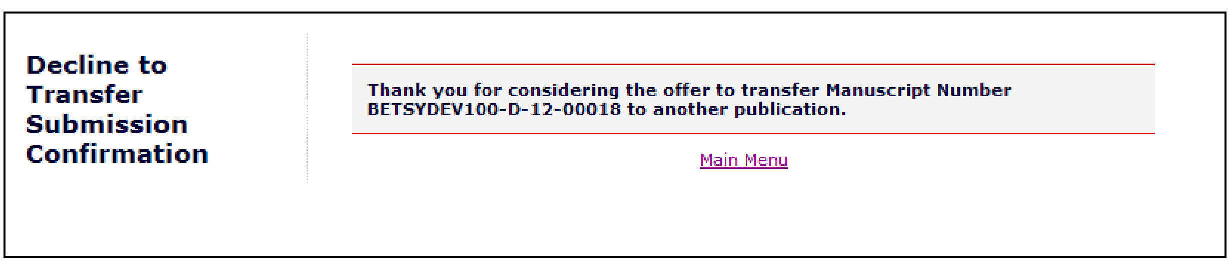
Details for Manuscript Number: BETSYDEV100-D-12-00017
"Demonstration of Non-EM Transfer"

Cancel | Save and Close

Manuscript Notes | Production Notes | Editors | Reviewers | Alternate Reviewers | Additional Information

Additional Manuscript Details:	Add/Edit Additional Manuscript Details
Corresponding Author:	Hermione Grainger , , BOLIVIA [Proxy]
Corresponding Author E-Mail:	bhopkins@ariessc.com
Author Comments:	
Short Title:	
Article Type:	Original Study
Section/Category:	
Keywords:	
Classifications:	MORPHOLOGY; confocal microscopy; morphometry
Requested Editor:	
Technical Check:	Technical Check Information
Initial Date Submitted:	Nov 14 2012 01:51PM
Editorial Status Date:	Nov 15 2012 12:57PM
Similarity Check:	Not checked
Current Editorial Status:	Transfer Decision Pending
Transfer Offer Expiration Date:	Dec 15 2012 12:00AM
Attachments:	Attachments
Transmittal Form:	Link to Transmittal Form

If an Author does not wish to have their submission transferred to any of the available publications (as displayed via the %TRANSFER_TARGETS% merge code when the code is contained in the *Notify Author* letter), then he can either click the deep link inserted by the %DECLINE_TO_TRANSFER% merge field, or click the Decline to Transfer Action Link on the submission in the *Submission Transfers Waiting for Author's Approval* folder. Clicking either link brings the Author to a new *Decline Transfer Submission Confirmation* page.



Decline to Transfer Submission Confirmation

Thank you for considering the offer to transfer Manuscript Number BETSYDEV100-D-12-00018 to another publication.

Main Menu

A new event, "Author Declines to Transfer Submission" is triggered upon the Author declining the Transfer. The submission status changes to "Author Declines to Transfer", and any letters configured for this Event are sent (see 'To Configure' below). The Final Disposition of the submission is automatically set to 'Reject', and any letters configured for the event "Final Disposition – Reject" are sent. If a status is configured for this Event, then the status is changed on the submission. The submission moves out of the Author's *Submission Transfers Waiting for Author's Approval* folder and the Editor's *My Assignments Pending Transfer* and *All Submissions Pending Transfer* folders.

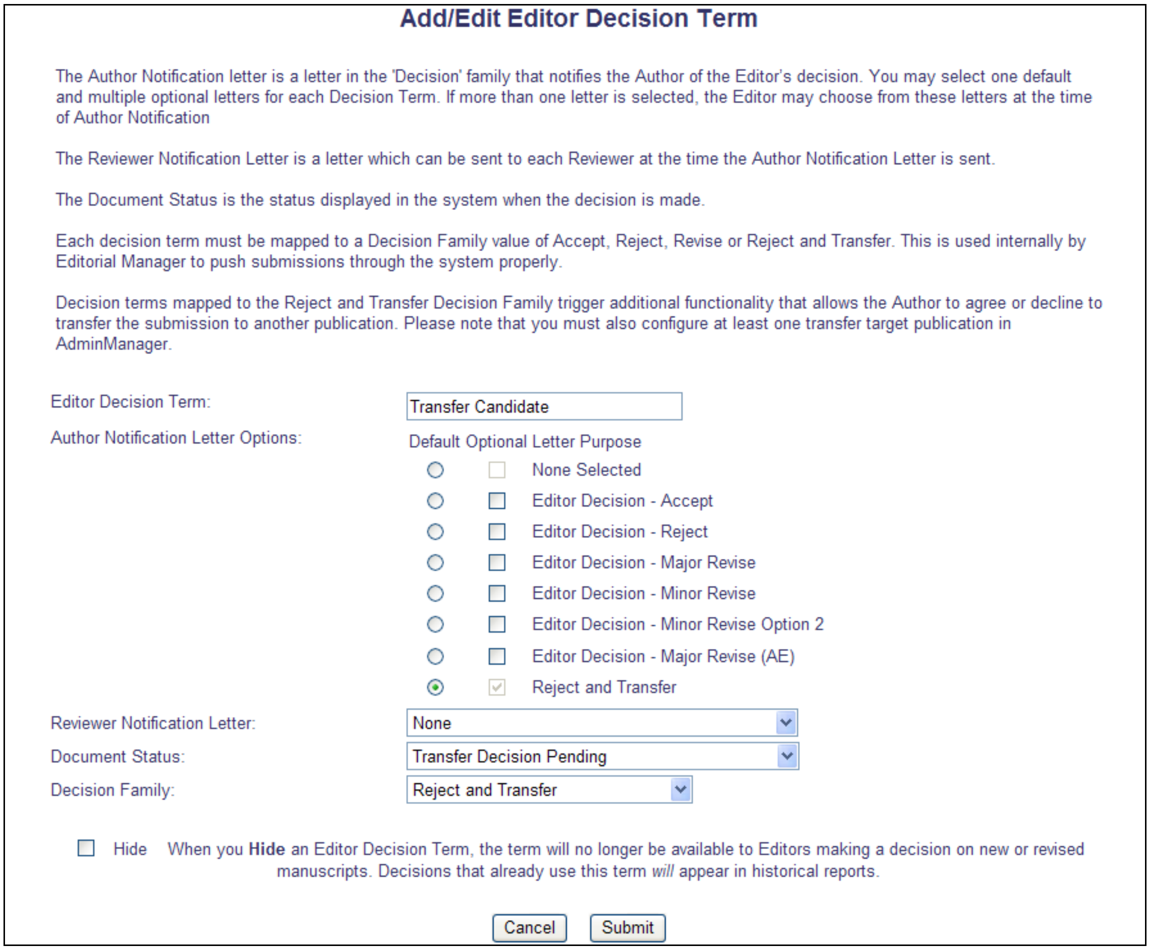
If an Author does agree to have their submission transferred to another publication, then she can either click the deep link inserted by the %AGREE_TO_TRANSFER% merge field, or click the Agree to Transfer Action Link on the submission in the *Submission Transfers Waiting for Author's Approval* folder. Clicking either link brings the Author to a new *Transfer Submission to a Different Publication* page. This page displays the list of available Target Publications as configured in this Publication and a link to the site. An additional 'DO NOT TRANSFER SUBMISSION' option is listed; the Author can still decide at this point to decline the transfer.

When the Author selects a Transfer destination and clicks the 'Submit' button, a new event, "Author Agrees to Transfer Submission" is triggered. The submission status changes to "Author Agrees to Transfer", and any letters configured for this Event are sent (see 'To Configure' below). The Final Disposition of the submission is automatically set to 'Transfer', and any letters configured for the event "Final Disposition – Transfer" are sent. The status is changed on the submission to 'Submission Transferred', and the appropriate transfer process is initiated (either existing EM-to-EM transfer, or the new EM-to-Non-EM Transfer, introduced in v10.0). The submission moves out of the Author's *Submission Transfers Waiting for Author's Approval* folder and the Editor's *My Assignments Pending Transfer* and *All Submissions Pending Transfer* folders.

If an Author does not Agree to or Decline the Transfer offer, and the 'Transfer Time Limit' is reached on the submission, the system automatically sets the Final Disposition of the submission to 'Reject', and moves the submission out of the Author's *Submission Transfers Waiting for Author's Approval* folder and the Editor's *My Assignments Pending Transfer* and *All Submissions Pending Transfer* folders. Note that in this scenario, the new "Author Declines to Transfer" event is not triggered, as the Author did not Decline the transfer, but rather the offer expired.

TO CONFIGURE:
To create a new Decision Term in the new 'Reject and Transfer' Decision Family, go to PolicyManager, Edit Editor Decision Terms, and click the 'Add New Term' button. Enter your new Decision Term, select the desired Author Notification Letter(s), a Reviewer Notification

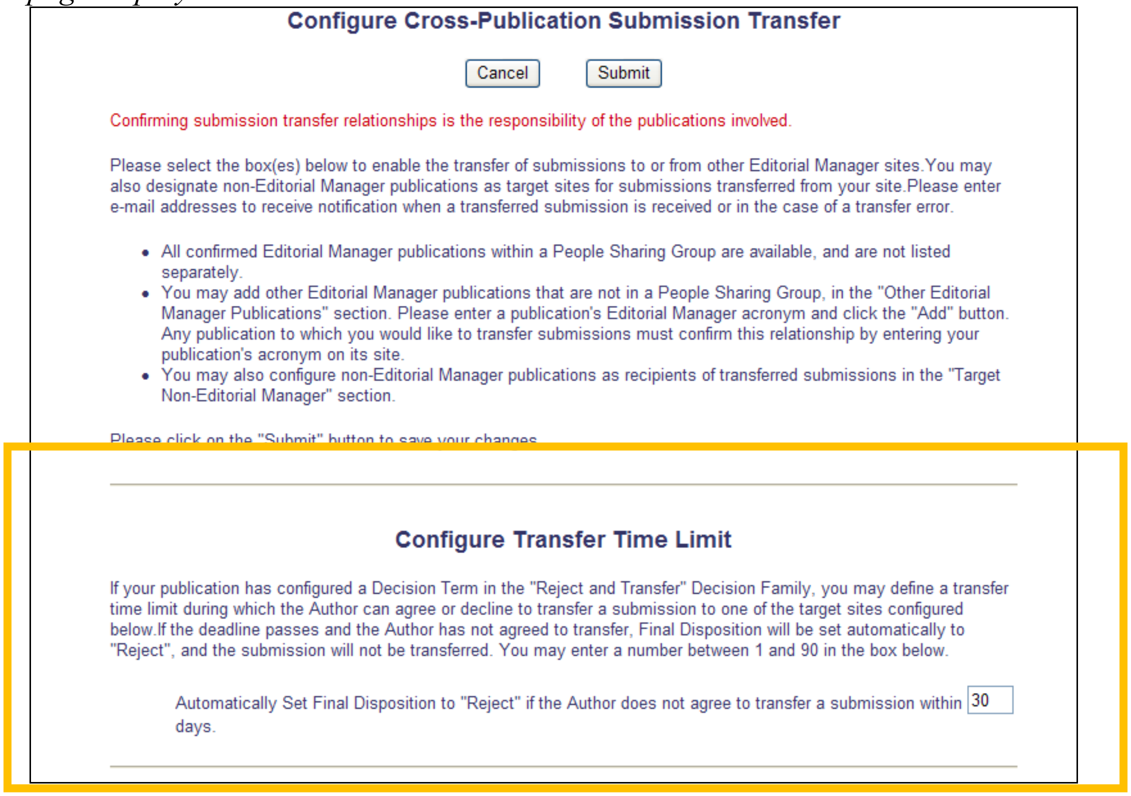
Letter (if desired), and the Document Status you wish to have displayed when this Decision term is selected. The Decision Family should be 'Reject and Transfer'.



NOTE: A 'Reject and Transfer' Family Decision should only be created if there is at least one Target Publication configured on the *Configure Cross-Publication Submission Transfer* page in AdminManager. Even if a 'Reject and Transfer' Family Decision has been configured, the term will not be available for Editors to select on the *Submit Editor's Decision and Comments* page if there are no confirmed Transfer Target publications.

To configure a "Transfer Time Limit", a period of time during which the Corresponding Author may agree or decline to transfer his submission to one of the configured publications, go to AdminManager, Configure Cross-Publication Submission Transfer, and set a number between 1 and 90 in the "Automatically Set Final Disposition to "Reject" if the Author does not agree to transfer a submission within {n} days" setting. On upgrade, n=30.

Partial page display:



To create new letters for use in notifying the Author of a ‘Reject and Transfer’ Decision, go to PolicyManager, Edit Letters, and Add a new letter in the ‘Decision’ Letter Family. The following new Merge Fields should be included in the letter:

- **%AGREE_TO_TRANSFER%** - Generates a deep link that, when clicked, fully logs the Author in and delivers him to the new *Transfer Submission to a Different Publication* page, where he can select the publication to which he wishes to have his paper transferred
- **%DECLINE_TO_TRANSFER%** - Generates a deep link that, when clicked, delivers the Author to the *Decline to Transfer Confirmation* page, and automatically sets the Final Disposition to ‘Reject’
- **%TRANSFER_TARGETS%** - Displays a list of all publications to which this submission can be transferred, along with links to these websites. The Author will be able to choose which of these sites she wishes to transfer her submission to when she agrees to the transfer.
- **%TRANSFER_OFFER_EXPIRATION_DATE%** - Displays the date by which an Author must agree to transfer the submission before a Final Disposition of “Reject” is automatically set. This date is calculated at time the Author is notified of the Decision based on the number of days configured on the *Configure Cross-Publication Submission Transfer* page.

Additionally, the new merge field **%ACTUAL_TRANSFER_PUBLICATION_TITLE%** can be added to a letter configured for the new ‘Author Agrees to Transfer Submission’ event. This merge field will display the name of the Publication to which the submission has been transferred.

On upgrade to EM v10.0, three new Document Statuses are added.

- Transfer Pending
- Author Agrees to Transfer
- Author Declines to Transfer

To edit the text of these terms, or create a different term, go to PolicyManager, Edit Document Status, and click the Edit link next to the desired status.

Edit Document Statuses

Listed below are the text strings used to define Document Status and the Role Family that assumes responsibility for a document when the status is assigned. If an Alternative Text for Authors is defined, then this is what Authors will see when they are configured in RoleManager to view the Current Document Status; leave this blank if the Author should see the main Editorial Status Text term. Where you have several Main Status Terms that are configured to trigger consecutively in ActionManager, you can set them all to have the same Alternative text for Authors value so that the author will see no corresponding change in status during this time.

Editorial Status Text	Alternative Text for Authors (if Different)	Role Family		
No Change	No Change			
Accept		EDITOR	Remove	Edit
Accept and Transmit Conference Submission		EDITOR		Edit
Accept for Extraction Conference Submission		EDITOR		Edit
Accepted on Submission		EDITOR		Edit
Author Agrees to Transfer		EDITOR		Edit
Author Approves Changes		EDITOR	Remove	Edit
Author Declines to Revise		No Change	Remove	Edit
Author Declines to Transfer		EDITOR		Edit
Authors Invited		AUTHOR	Remove	Edit

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Editorial Status Text	Alternative Text for Authors (if Different)	Role Family		
Sent Back to Author		AUTHOR	Remove	Edit
Sent Back to Author		AUTHOR		Edit
Submission Transferred		EDITOR		Edit
Transfer Decision Pending		AUTHOR	Remove	Edit
Transfer Pending		EDITOR		Edit
Transferred Submission Received		EDITOR		Edit
Unassign Editor		No Change		Edit
Unassign Editor Notification		No Change		Edit
Under Peer Review		REVIEWER	Remove	Edit
Withdrawn Conference Submission		EDITOR		Edit
Withdrawn Proposal		EDITOR		Edit

Add New Status

Two new Events, “Author Agrees to Transfer Submission” and “Author Declines to Transfer Submission”, are available for sending letters to the Corresponding Author and Editors with access to the submission (including the Special Relationship Editor). These Events are added with a pre-configured Event Status, though the text can be edited.

Partial page display; ActionManager:

ActionManager

Editor Decision and Final Disposition

Event	New Document Status	Warnings	Alternative Text for Authors
Editor Decision	Decision in Process		
Rescind Decision	Decision Rescinded		
Final Disposition – Accept on Submission	Accepted on Submission		
Final Disposition - Accept	Completed		
Final Disposition - Reject	Completed		
Final Disposition - Withdrawn	Completed		
Author Agrees to Transfer Submission	Author Agrees to Transfer		
Author Declines to Transfer Submission	Author Declines to Transfer		
Final Disposition - Transfer	Submission Transferred		
Final Disposition - Completed Proposal	Complete Proposal		

To add the new 'Transfer Offer Expiration Date' item to a custom *Details* layout, go to PolicyManager, Define Details Page Layouts, and Edit an existing layout, or Add a new layout. Click the Select Items to Display link, and select the new option, located in the 'Key Workflow Dates and Status Information' section.

Partial page display Select Items for Display*;*

Select Items to Display for 10.0 Copy of Default Editorial

Select the information to appear on the Details page

* Items marked with an asterisk are subject to additional permissions, which may mean that some users will not be able to view them until you give them the additional permission to do so in RoleManager.

Expand All Collapse All

- ⊞ **Links**
- ⊞ **Information Submitted by Author**
- ⊞ **General Manuscript Information**
- ⊞ **Proposal Specific Information**
- ⊞ **Additional Manuscript Details**
- ⊟ **Key Workflow Dates and Status Information**
  - ☑ Current Editorial Status
  - ☑ Transfer Offer Expiration Date
  - ☑ Editorial Status Date
  - ☑ Production Status
  - ☑ Initial Date Submitted

Allow Editors to Limit Transfer Destination Options

In EM v9.2, publications may be configured to allow the transfer of a submission to another Editorial Manager site. In EM v10.0, this is further extended to allow publications to transfer submissions to non-EM publications. Additionally, Editors may choose to let the Corresponding Author decide whether to have their submission Transferred to another publication, providing him or her with the list of publications configured as possible recipients. Some publications may have large lists of EM and non-EM sites they have configured as available Transfer Targets, which can be overwhelming to Authors.

Additional functionality introduced in v10.0 allows Editors to limit the number of possible Transfer Targets from which an Author may choose a destination. Further, Publications may define a maximum number of options an Editor can provide to the Corresponding Author when a decision of "Reject and Transfer" is made on a submission.

When this new feature is enabled, then when an Editor makes a decision in the 'Reject and Transfer' Decision family, and that Editor further has either 'Draft' or 'Draft and Send' permission on the selected Decision (see the "Notify Author Refinements" section of these Release Notes for information on the 'Draft' and 'Draft and Send' permissions), then when that Editor clicks the 'Proceed' button on the *Draft Decision* page (following the *Submit Editor's Decision and Comments*), she is brought to a new interim *Select Transfer Target Publication* page. This page displays all configured Transfer Target publications from which the Editor may choose the desired target options for the Author to choose from.

Sample page; Editor can suggest only one (1) transfer target to the Author:

Sample *Transfer Target Publication* page, when the Editor may suggest up to 3 publications:

When Transfer Targets are selected and the Editor clicks the 'Proceed' button, he continues onto the *Notify Author* page. This page now includes a 'Transfer Target Publications' section that displays the publications selected by the Editor. If he wishes to change the selections, he can click the Edit Transfer Target Publication List link displayed below the list. Clicking this link saves any changes made to the page and brings the Editor back to the *Select Transfer Target Publications* page.

Partial page display; Notify Author *page:*

NOTE: If an Editor has made a decision that is not in the 'Reject and Transfer' family, he will not be given the option to select Transfer Targets. If the Decision term is subsequently changed on the *Notify Author* page, the Editor will be navigated to the new *Select Transfer Target Publications* page.

TO CONFIGURE:
To allow Editors to select transfer targets to suggest to the Corresponding Author, go to AdminManager, Configure Cross-Publication Submission Transfer, and select/check the new 'Allow the Editor to suggest the transfer target publication(s)' checkbox.

If you wish to limit the number of options the Editor can suggest, select/check the 'Editors may suggest up to {n} publication(s)' sub-option, and enter the desired number of publications to which the Editor should be limited.

Configure Cross-Publication Submission Transfer

[Cancel] [Submit]

Confirming submission transfer relationships is the responsibility of the publications involved.

Please select the box(es) below to enable the transfer of submissions to or from other Editorial Manager sites.You may also designate non-Editorial Manager publications as target sites for submissions transferred from your site.Please enter e-mail addresses to receive notification when a transferred submission is received or in the case of a transfer error.

- All confirmed Editorial Manager publications within a People Sharing Group are available, and are not listed separately.
- You may add other Editorial Manager publications that are not in a People Sharing Group, in the "Other Editorial Manager Publications" section. Please enter a publication's Editorial Manager acronym and click the "Add" button. Any publication to which you would like to transfer submissions must confirm this relationship by entering your publication's acronym on its site.
- You may also configure non-Editorial Manager publications as recipients of transferred submissions in the "Target Non-Editorial Manager" section.

Please click on the "Submit" button to save your changes.

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Restrict Transfer Target Publication(s)

When Authors are notified of a decision in the "Reject and Transfer" Decision Family, they are given the opportunity to agree or decline to transfer their submission to another publication.You may allow the notifying Editor to restrict the list of transfer targets presented to the Author.

☑ Allow the Editor to suggest the transfer target publication(s)

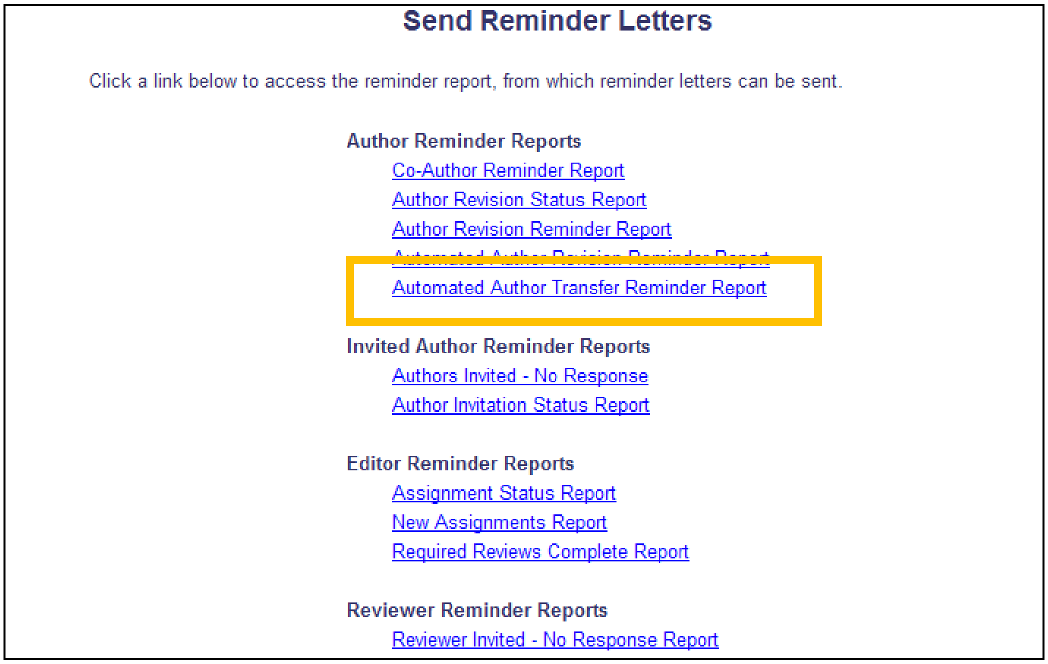
☐ Editors may suggest up to [1] publication(s)

Automated Author Transfer Reminder Report

To support the new feature allowing Authors to authorize a submission transfer (see the "Allow Authors to Authorize Transfer and Select Destination" section of these Release Notes), a new *Automated Author Transfer Reminder Report* is introduced for Editors with the new 'Create Automated Author Transfer Reminders' permission enabled. When created, this reminder will send automated reminders to Authors with pending Transfer requests. This permission is disabled/not selected on upgrade to v10.0.

Users with the existing 'Produce Reports' permission and the new 'Create Automated Author Transfer Reminders' permission will see the Automated Author Transfer Reminder Report link on the *Reports Menu* in the 'Author Reminder Reports' section.

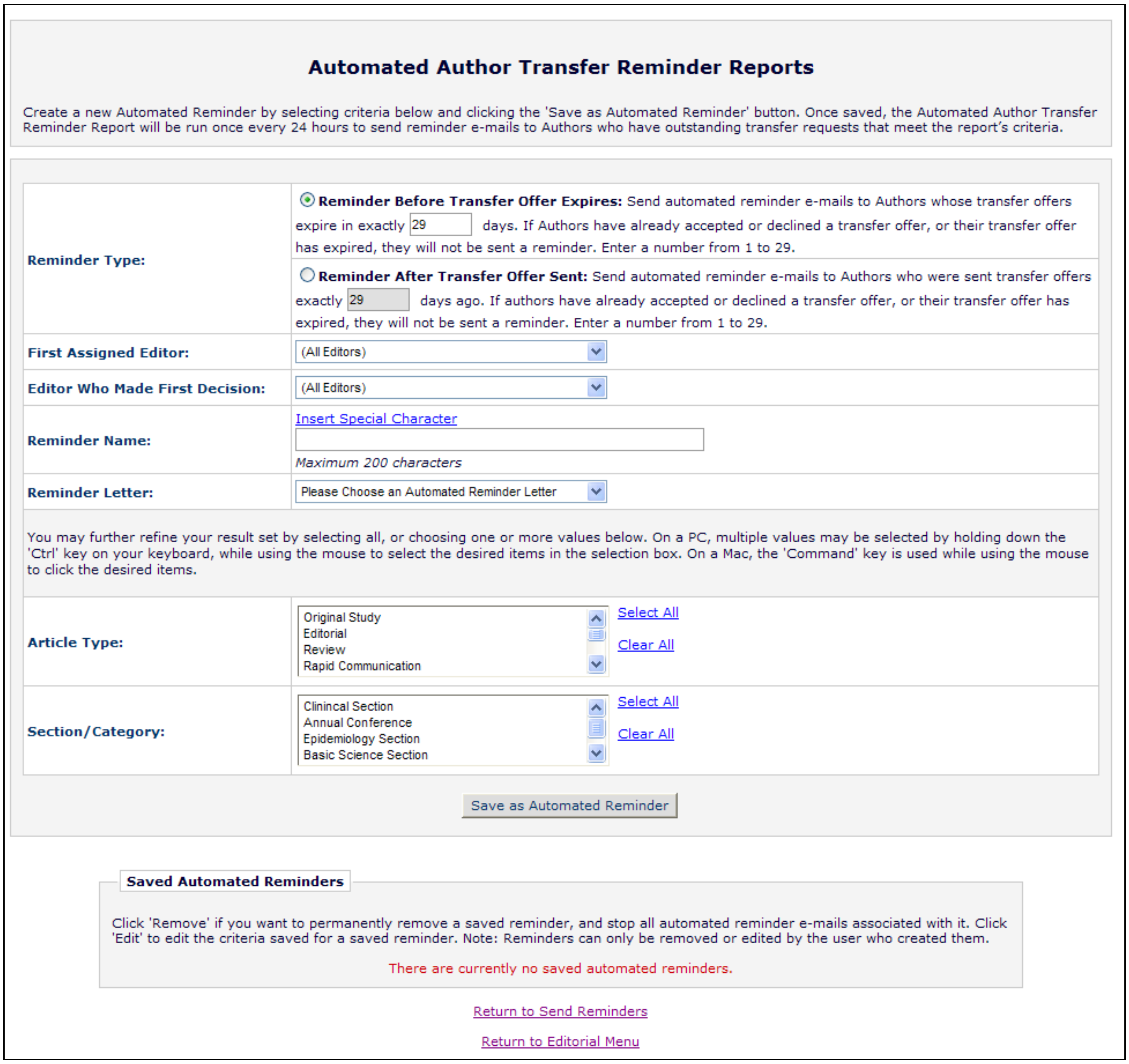
Users with the existing 'Send Author Reminders' permission and the new 'Create Automated Author Transfer Reminders' permission will see the Automated Author Transfer Reminder Report link on the *Send Reminder Letters* page (accessible from the Editorial Main Menu).



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

- Reminder Before Transfer Offer Expires - Reminders will be sent to Authors where the Author was sent an offer to transfer the submission to another site but the Author has not taken action, and the offer is set to expire in {n} days (where n = the value entered in the box).
- Reminder After Transfer Offer Sent - Reminders will be sent to Authors where the Author was sent an offer {n} days ago to transfer the submission to another site but the Author has not taken action, and the offer has not expired (where n = the value entered in the box).

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



Once an Automated Reminder is created and saved, it is listed at the bottom of the page. All Editors can see the complete list of Automated Reminders that have been created on this page, including the Creator, Type, and Number of Days for the given report. Only the user who created the Automated Reminder can stop running that reminder (by clicking the Remove link) or edit the criteria. The order in which the saved reports display can be updated by using the 'Order' column and the "Update Order" button.

NOTE: The saved order displays for all Editors with access to the *Automated Author Transfer Reminder Report* page, not just for the current Editor.

Saved Automated Reminders

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

Select the order in which the saved reminders should appear on this page. To re-order them, change the number for a saved reminder, click the 'Update Order' button, and all of the saved reminders will re-order accordingly.

Order	Reminder Name	Reminder Type	Number of Days	Reminder Creator	Remove	Edit
1	Second Reminder	Before Transfer Offer Expires	3	Mary Jones, PhD		
2	First Reminder	After Transfer Offer Sent	4	Mary Jones, PhD		
3	Offer Expires Tomorrow	Before Transfer Offer Expires	1	Twink E. Jones, PhD	Remove	Edit
4	You were sent the transfer request 16 days ago, but this is really just a long reminder name to see how it looks when displayed on the page.	After Transfer Offer Sent	16	Edward Thurston Howell Browdy the Third		

Update Order

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

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

Some notes about Automated Author Transfer Reminders:

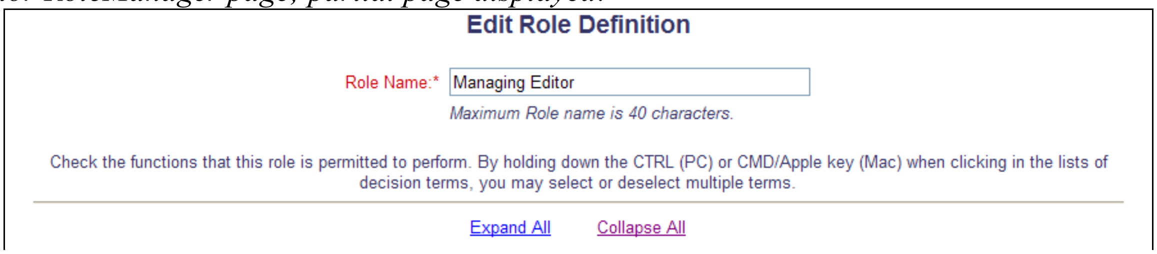
1. The reminder queries retrieve records that meet the criteria exactly. For example, a reminder that stipulates a reminder to be sent "to Authors whose transfer offers expire in exactly 5 days." does not generate a reminder when the transfer offer expires in 6 days, 4 days, etc.
2. Users that have the 'Restrict Reminder Reports to Assigned Submissions' permission enabled are also able to save automated reminder criteria, triggering the creation of batch automated reminders that are delivered only to Authors associated with their assigned submissions.
3. If the Editor who saved the reminder is 'blinded' to a submission that matches the Automated Reminder criteria, no automated reminder e-mail will be sent.
4. All automated reminder letters are written to the Correspondence History.

Two new merge fields are available for use in the Author Reminder Letters:

- **%AUTHOR_TRANSFER_REMIND_COUNT%** - Inserts the number of transfer reminders that have been sent to the Author for this submission.
- **%AUTHOR_TRANSFER_REMIND_DATE%** - Inserts the date that the last transfer reminder was sent to the Author for this submission.

TO CONFIGURE:
To allow Editor Roles to create new Automated Author Transfer Reminder Reports, go to RoleManager, select the Editor Role, and go to the 'Administrative and Reporting Functions' section. Select/check the new 'Create Automated Author Transfer Reminders' permission. Make sure the Editor Role also has either 'Produce Reports' permission or 'Send Author Reminders'; otherwise they will not be able to access the Automated Author Transfer Reminder Report.

Editor RoleManager page; partial page displayed:



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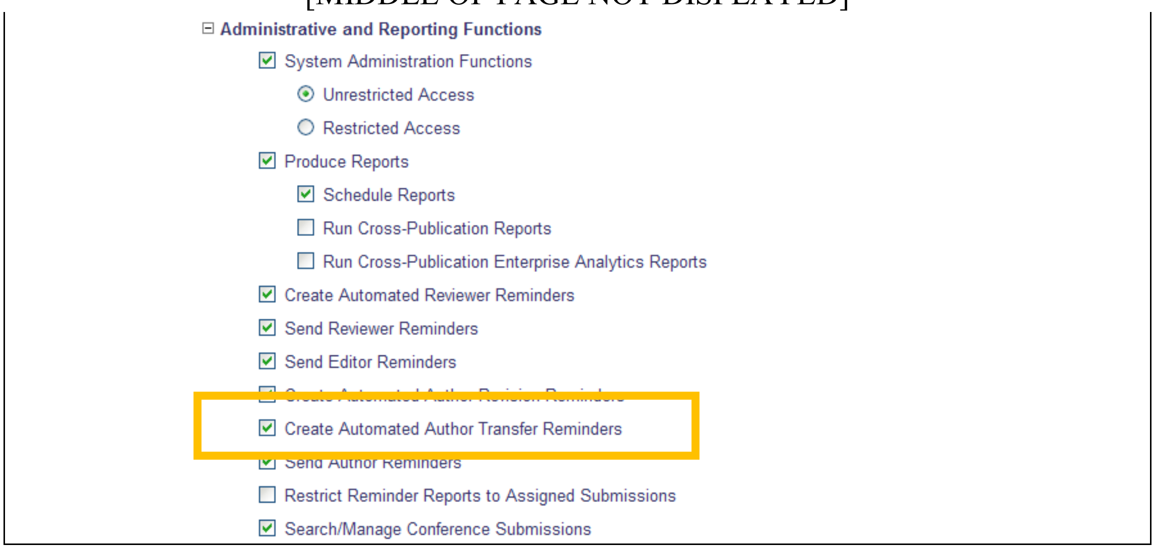


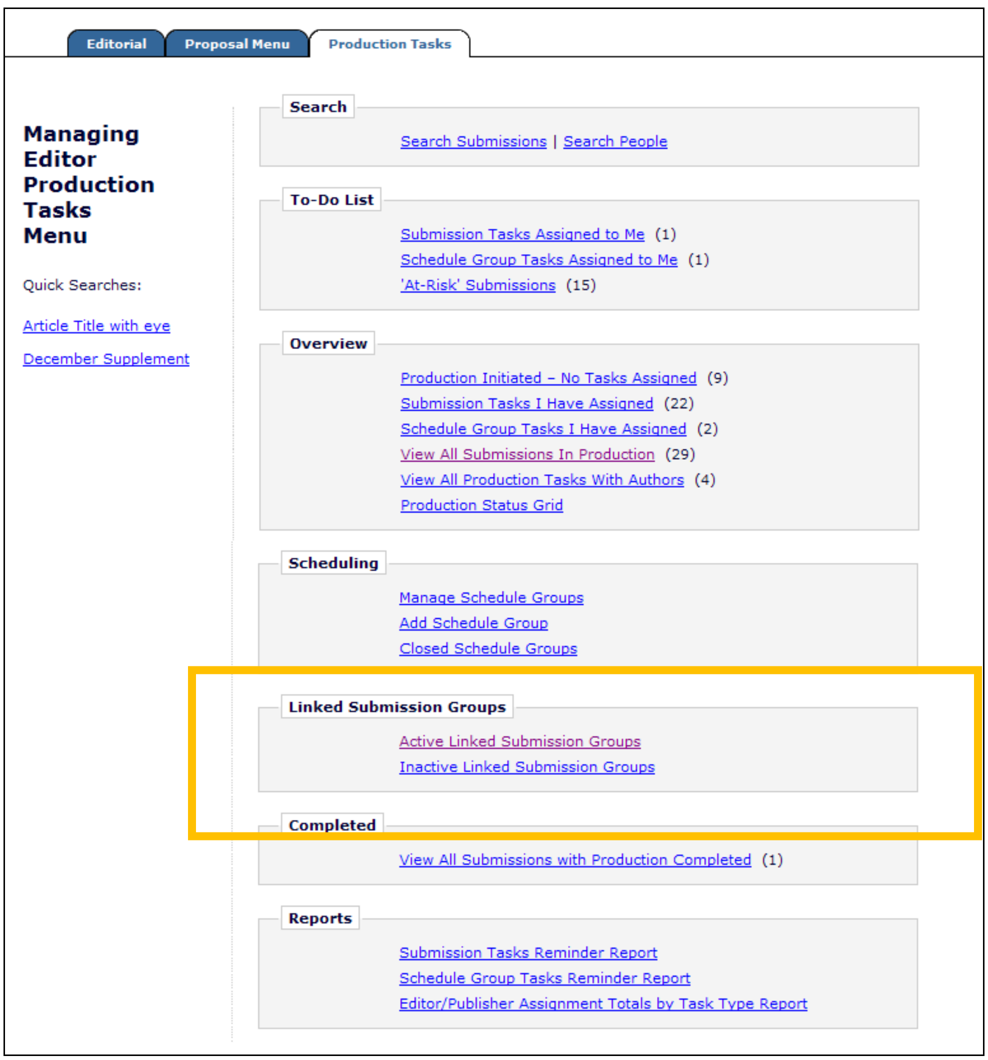
To create a new Author Reminder letter for use in the Automated Author Transfer Reminder Report, go to PolicyManager, Edit Letters, and Edit an existing letter, or add a new letter to the Author Reminders letter family. Include the new merge fields to send transfer reminder information.

PRODUCTION TRACKING ENHANCEMENTS

Expanded Linked Submissions Availability

In EM v9.2, publications may use the Linked Submissions feature to link submissions together for general reference (those that are related by Author or topic) or to group Letters to the Editor together (this type of Linked Group allows additional functionality when inviting Authors to provide a commentary). For example, the Editor can link a series of manuscripts submitted by the same Author. Or, the publication office can link a group of submissions that need to be processed together. For Editors, the Linked Submission information is only available on the Editorial Main Menu. For publications that use Production Tracking, there is no visibility to this information from the *Production Tasks Menu*.

New in EM/PM v10.0, users with permission to 'View Linked Submission Groups' will now see the 'Linked Submission Groups' header and corresponding Active Linked Submission Groups and Inactive Linked Submission Groups links on the Production Tasks Menu.



Additionally, the Linked Submissions Action Link will now display in the following Production Tasks Menu folders (based on the logged in user's permissions):

- Incomplete Submissions
- Submissions Needing Approval
- 'At-Risk' Submissions
- Production Initiated – No Tasks Assigned
- View All Submissions In Production
- Production Status Grid
    - Traditional View
    - Interactive View
- View All Submissions with Production Completed
- Edit Schedule Group Details/Add Submissions
- Add Submissions to Schedule Group

NOTE: The Linked Submissions action link is not added to task-based folders or schedule group-based folders.

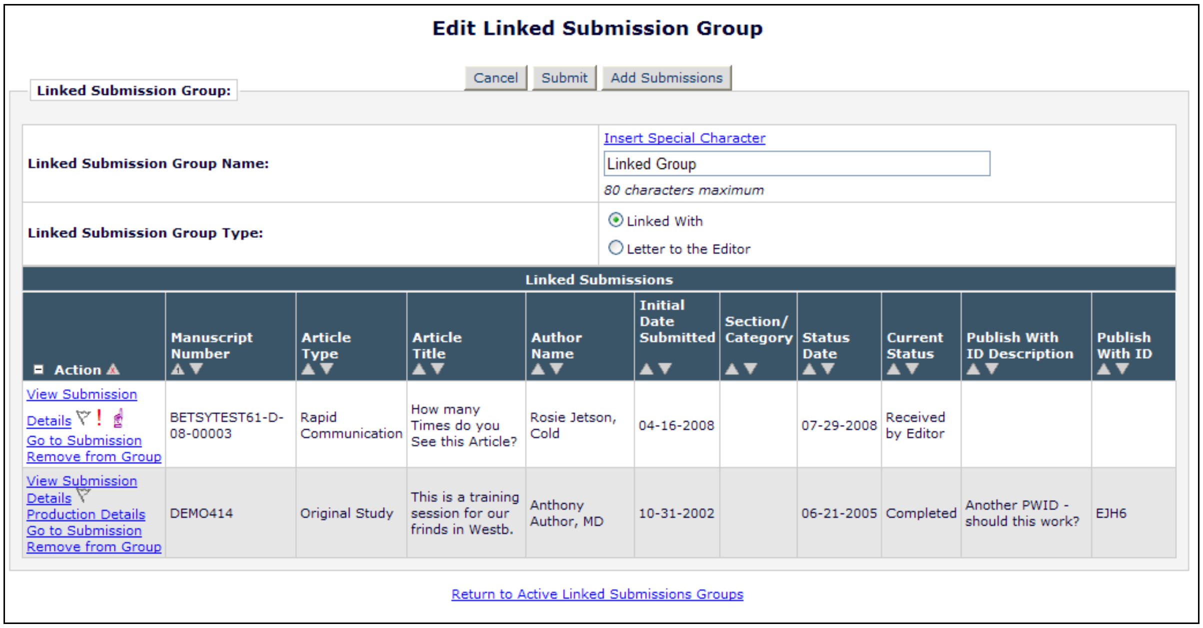
Additionally, Editor and Publisher Roles (with proper permission) may now see the Production Details link for a submission and associated Submission Flags from both the *Linked Submissions for Manuscript* page and the *Edit Linked Submission Group* page (for Active Linked Submission Groups only) when viewed from the *Production Tasks* menu.

Editors will see the Production Details link for submissions in production on which they are not blinded when:

- The Editor has both 'View Production Details' and
    - The Editor has a pending assignment for the current revision and has 'View Linked Submission Groups' permission enabled

    OR
    - The Editor has both 'View All Submissions' **and** 'Create/Edit Linked Submission Groups' permission enabled

Publishers will see the Production Details link for submissions when three permissions are enabled: 'View Production Details', 'View All Accepted Submissions', and 'Create/Edit Linked Submission Groups'.



TO CONFIGURE:
Users with ‘View Linked Submissions’ permission and permission to view the Production Tasks menu will see the Linked Submissions information.

To enable Editor Roles to view the additional Production Details links (on appropriate submissions) on the *Linked Submissions for Manuscript* page and the *Edit Linked Submission Group* pages, go to RoleManager, select the Editor Role to have these permissions, and set/check the existing ‘View Production Details’, 'View Linked Submission Groups', 'Create/Edit Linked Submission Groups’, and/or 'View All Submissions' as appropriate.

To enable Publisher Roles to view the Production Details link, on the *Linked Submissions for Manuscript* page and the *Edit Linked Submission Group* pages, go to RoleManager, select the Publisher Role to have permission, and select/check the existing permissions 'View Production Details', 'View All Accepted Submissions', and 'Create/Edit Linked Submission Groups'.

CUSTOM REPORTS ENHANCEMENTS

A new 'Submissions & All Authors Questionnaires' view is added to Custom Reports to allow publications to easily run reports against Author Questionnaires asked of Corresponding and Co-Authors. The information contained in this view represents Author information in the 'Authors' table, representing Author information at the time the manuscript was submitted.

Results return one row per Author per Question. The following fields are contained in the new view:

DOI [DOCUMENT.DOI] The Digital Object Identifier (DOI) is an emerging international standard in the publishing industry. This value uniquely identifies this submission to the rest of the world. See http://www.doi.org for more information about this standard. **Hints:** According to the standard referred to above, a digital object identifier must take the form 10.[string]/[string], where [string] is a list of one or more Unicode characters.
Article Title [DOCUMENT.DTITLE] Title entered by Author when submitting a new manuscript.
Short Title [DOCUMENT.SHORT_TITLE] Short Title entered by Author when submitting a new manuscript.
Article Type [DOCUMENT.CATEGORY] Article Type is required for submission. Values are defined by the journal, and may include values such as Original Study, Rapid Communication, Case Study.
Initial Date Submitted [DOCUMENT.RECEIVED] The date the Author approved his initial submission of the manuscript, and it was received by the journal office. This is the date that is used to calculate the elapsed time to decision for a submission. **Hints:** The Initial Date Submitted may be overwritten if the Editor edits the submission and sends it back to the Author for approval before another Editor is assigned (edited in New Submissions folder) or before any Reviewers have been invited (edited in New Assignments folder). In this case, the original Received Date is overwritten with the date the Author approved the edited submission.
Editorial Status [DSTATUS.NAME] Editorial Status Term defined by the journal.
Editorial Status Date [DOCUMENT.STATUSDATE] Date the Status changed in the Manuscript Status field. The journal defines the changes in status for each event in ActionManager. **Hints:** Note that some events are non-configurable by the journal.
Final Disposition Term [DDISPOSI.NAME] Allowable values for a regular submission: Accept, Reject, Withdrawn. Allowable values for a Proposal: Completed Proposal, Withdrawn Proposal. Allowable values for a conference submission: Accept and Transmit, Accept for Extraction, Reject, Withdrawn. These terms are defined by Aries, and are not configurable by the journal. Only the "Withdraw" option is available for a regular submission until the Author has been notified of the Editor's decision. **Hints:** Value is null (blank) if the Final Disposition has not yet been set. To find all submissions Accepted for publication, user can enter criteria Final Disposition Term = 'Accept', or Final Disposition Term BEGINS WITH 'Acc'.
Date Final Disposition Set [DOCUMENT.DDISPOSIDATE] Date the final disposition was set on the manuscript.

Manuscript Number **[DOCUMENT.PUBDNUMBER]**
Manuscript Number is assigned to a submission after it is received by the journal office. If the journal assigns Manuscript Numbers automatically, the system assigns the number when the submission is assigned to an Editor. If the journal assigns Manuscript Numbers manually, the Manuscript Number must be assigned before the submission can be assigned to an Editor. The value is null (blank) until this point (e.g. while Author is submitting his manuscript, while PDF is being built).

Unique Document ID **[DOCUMENT.DOCUMENTID]**
Unique identifier for each submission in the system. This is the number used in several other tables to specify data related to a particular submission.

Final Decision Date **[DOCUMENT.FINALDECISIONDATE]**
Most recent Editor's decision date, that is, date when the final decision was made by the Editor.

Final Decision Term **[SUBMISSIONS_ALL_AUTHORS_QUESTIONNAIRES_VIEW.FINAL_DECISION_TERM]**
The final editorial decision for the submission.
Hints: Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will appear in this field.

Question Order **[SUBMISSION_QUESTION_ANSWERS.RANK]**
The order in which the Custom Submission Question appeared on the questionnaire when it was asked

Custom Submission Question ID **[SUBMISSION_QUESTION_DEFINITION.SUBMISSION_QUESTION_DEFINITION_ID]**
Uniquely identifies each record in the Custom Submission Questions table

Question Text **[SUBMISSION_QUESTION_DEFINITION.QUESTION_TEXT]**
The text of the question as displayed to the author

Author Response **[SUBMISSIONS_ALL_AUTHORS_QUESTIONNAIRES_VIEW.RESPONSE]**
The author's response to a question associated with an Author Questionnaire.

Asked at Initial Submission **[SUBMISSIONS_ALL_AUTHORS_QUESTIONNAIRES_VIEW.ASKED_ON_ORIGINAL]**
Value is True/1 if the question appeared on the Author Questionnaire configured for New Submissions. Value is False/0 if not.

Author's Address Line 1 **[AUTHORS.ADDRESS1]**
First line of the Author's address, as entered during the submission process
Hints: This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

Author's Address Line 2 **[AUTHORS.ADDRESS2]**
Second line of the Author's address, as entered during the submission process
Hints: This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

Author's Address Line 3 **[AUTHORS.ADDRESS3]**
Third line of the Author's address, as entered during the submission process
Hints: This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

Author's Address Line 4 **[AUTHORS.ADDRESS4]**
Fourth line of the Author's address, as entered during the submission process
Hints: This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

Author's Affiliation **[AUTHORS.AFFILIATION]**
Institution entered by the Author in Add/Edit/Remove Authors section of Submit New Manuscript or Edit Manuscript.

Asked at Revision **[SUBMISSIONS_ALL_AUTHORS_QUESTIONNAIRES_VIEW.ASKED_ON_REVISION]**
Value is True/1 if the question appeared on the Author Questionnaire configured for Revised Submissions. Value is False/0 if not.

Author Type **[AUTHORS.AUTHTYPE]**
Allowable values: 'on' (person is Corresponding Author for the manuscript) or 'off' (person is an Other Author for the manuscript)

Author's City **[AUTHORS.CITY]**
City of the Author's address, as entered during the submission process
Hints: This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

Author's Country **[AUTHORS.COUNTRY]**
This field stores the name of the country entered by the creator of the submission at the time of submission.
Hints: This may not match the ISO country name as the ISO country name may have changed since the paper was submitted.

Date Production Was Initiated **[DOCUMENT.DATE_PRODUCTION_WAS_INITIATED]**
Date the submission was put into production. Updated each time the submission (re)enters production. (See also Date First Entered Production.)

Author's Academic Degree **[AUTHORS.DEGREE]**

Author's Department **[AUTHORS.DEPARTMENT]**
The Author's department, as entered during the submission process
Hints: This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

Author's E-mail address **[AUTHORS.EMAIL]**

Author's First Name **[AUTHORS.FIRSTNAME]**
First name of the Author.

Author's Institution **[AUTHORS.INSTITUTE]**
The Author's Institution, as entered during the submission process
Hints: This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

Author's Last Name **[AUTHORS.LASTNAME]**
Last name of the Author.
Hints: The same person will likely appear many times in this table, particularly if they have submitted more than one manuscript and/or each manuscript has gone through some phase of revision.

Author's Middle Name **[AUTHORS.MIDDLENAME]**
Middle name of the Author.

Author's People ID **[SUBMISSIONS_ALL_AUTHORS_QUESTIONNAIRES_VIEW.PEOPLEID]**
People ID for the author whose response is saved in this record.
Hints: For co-authors, this is 0 unless the Article Type is configured to require co-authors to register. If registration is required, this is 0 until their authorship is verified.

Author's Order **[AUTHORS.RANK]**
This field indicates in what sequence the Authors are listed as contributors to the submission (e.g. First Author, Second Author, etc.)

Revision Independent Author ID **[AUTHORS.REVISION_INDEPENDENT_ID]** Links this Author record to a Verification Status record in the AUTHOR_VERIFICATION table, without regard to the revision number of the submission
Author's State/Province **[AUTHORS.STATE]** The State/Province of the Author's address, as entered during the submission process **Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.
Author's Title **[AUTHORS.TITLE]** The Author's title (e.g. Mr., Mrs., Dr., etc.) as entered during the submission process **Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.
Author's Zip/Postal Code **[AUTHORS.ZIPCODE]** The Zip/Postal Code of the Author's address, as entered during the submission process **Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.
Parent Question ID **[SUBMISSION_QUESTION_DEFINITION.PARENT_QUESTION_DEFINITION_ID]** If the question defined in this record is part of a multi-part question, this field identifies the question whose answer conditionally triggers this question to appear. If this question is not a follow-up question, this field will be blank.

TO CONFIGURE:
No configuration required. Editors with permission to run Custom Reports will have access to the new view on upgrade to EM v10.0.

MERGE FIELD ENHANCEMENTS

The following existing merge fields are enhanced with EM v10.0.

- **%AUTHOR_QUESTIONNAIRE%** - This merge field includes any question presented to the Corresponding Author on the 'Additional Information' step of the Submission process. These questions may be Submission Questions or Author Questions.
- **%OTHERAUTH_VERIFY_DEEP_LINK%** - when Co-Author Questionnaires are being used, expiration depends on the level of verification configured for the Article Type:
  - Verify only – the deep link expires after the Co-Author clicks on the [Submit to Publication] button on the *Contributing Authorship Questionnaire* page.
  - Register and Verify – the deep link expires after the Co-Author successfully logs in to the system from the login page presented after clicking on the deep link AND submits the questionnaire.
- **%OTHERAUTH_DECLINE_DEEP_LINK%** - the decline deep link expires after it is clicked.
  - NOTE: If a Co-Author clicks the deep link generated by the %OTHERAUTH_DECLINE_DEEP_LINK% merge field, and has previously saved responses to a Questionnaire, any saved responses are deleted.

The following new Merge Fields are added in v10.0:

SUGGEST EDITOR FEATURE

- **%SUGGEST_EDITOR_DECLINE_REASON%** - This merge field can be used in letters triggered by either the 'Editor Declines Invitation from an Editor' or 'Editor Declines Invitation of New Submission' ActionManager events. The %SUGGEST_EDITIOR_DECLINE_REASON% pulls in the Reason selected from the drop-down (if one is chosen) and any text entered by the Editor on Declining the Invitation.
  NOTE: This merge field is not available for use in "traditional" invitations, only Suggest Editor Invitations.

TRANSFER SUBMISSION FEATURE

- **%AGREE_TO_TRANSFER%** - Generates a deep link that, when clicked, fully logs the Author in and delivers him to the new *Transfer Submission to a Different Publication* page, where he can select the publication to which he wishes to have his paper transferred
- **%DECLINE_TO_TRANSFER%** - Generates a deep link that, when clicked, delivers the Author to the *Decline to Transfer Confirmation* page, and automatically sets the Final Disposition to 'Reject'
- **%TRANSFER_TARGETS%** - Displays a list of all publications to which this submission can be transferred, along with links to these websites. The Author will be able to choose which of these sites she wishes to transfer her submission to when she agrees to the transfer.
- **%TRANSFER_OFFER_EXPIRATION_DATE%** - Displays the date by which an Author must agree to transfer the submission before a Final Disposition of "Reject" is automatically set. This date is calculated at the time the Author is notified of the

Decision based on the number of days configured on the *Configure Cross-Publication Submission Transfer* page.

- **%ACTUAL_TRANSFER_PUBLICATION_TITLE%** - This merge field can be added to a letter configured for the new 'Author Agrees to Transfer Submission' event. This merge field will display the name of the Publication to which the submission has been transferred.

Two new merge fields are available for use in the Author Reminder Letters:

- **%AUTHOR_TRANSFER_REMIND_COUNT%** - Inserts the number of transfer reminders that have been sent to the Author for this submission.
- **%AUTHOR_TRANSFER_REMIND_DATE%** - Inserts the date that the last transfer reminder was sent to the Author for this submission.