


CONFIDENTIAL AND PROPRIETARY

Release Notification

 **Editorial Manager[®]**

 **ProduXion Manager[®]**

 **Commerce Manager[™]**

Editorial Manager/ProduXion Manager

12.2 General Release Notification

02/15/2016

Draft – Subject to Change

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Document Change Log

| Date | Version | Change |
|-------------------------|-----------------|-------------------------------------------------------------------|
| 10/16/15 | Beta Release | Beta version |
| 11/23/2015 12/8/2015 | Gamma Release | Gamma Version *Updates to screenshots *Clarified text |
| 12/29/2015 | General Release | *Added 'View Publication Charges Permissions' feature information |
| 2/8/2016 | General Release | Formatting issues |

Editorial Manager/ProduXion Manager 12.2 General Release Notification

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GENERAL ENHANCEMENTS

Replace Editor in the Chain

In EM version 12.1, a submission may be passed through several Editors in a 'chain'. The Editor Chain is created when a submission is assigned to an Editor who in turn, assigns the submission to a lower-level Editor. If an error is made during the assignment, each Editor may be unassigned individually in the reverse order in which they were assigned. If there are several Editors assigned below the erroneous Editor, each lower Editor assignment must be unassigned before an Administrator can correct the chain.

New in EM version 12.2, Editors and Administrators with appropriate permissions may replace or remove an Editor located in any position in the current Editor Assignment Chain for the current version of a submission, subject to conditions related to the state of the submission.

Depending on the logged-in user's *RoleManager* permissions, an Editor assignment can be removed from the chain or replaced by an Editor with a different Editor Role where:

The Editor being modified has NOT made or saved a decision AND one of the following applies:

- ✚ There are no unprocessed reviews (invitations, open reviews, or reviews that were submitted after the last complete decision was made) and:
 - One "Good Decision" (a complete decision that has not been skipped or terminated) has already been submitted
 - Another Editor in the chain has "Make a Decision" permission
- ✚ OR all Reviewer assignments have been processed
- ✚ OR there are unprocessed Reviewer Assignments AND there is at least one open Editor Assignment with "Make a Decision" permission.

NOTE: Replacing an Editor in the chain is not dependent on the method by which the Editor was assigned. Publications using Suggest Editor, Assign Editor Chain, individual assignment, individual invitation, and Direct-to-Editor assignments may use this feature.

To achieve this functionality, two new sub-permissions are added to the 'Unassign Myself' permission in Editor *RoleManager*: 'Unassign Subordinate Editors' and 'Replace Editor'.

- The 'Unassign Subordinate Editors' permission allows an Editor to remove his/her Editor Assignment or the Assignment(s) of lower level Editor(s).
- The 'Replace Editor' permission allows an Editor to switch his/her own assignment (or that of a lower level Editor if the user also has "Unassign Subordinate Editors" permission) to another Editor.

The existing permissions of 'Unassign Other Editors' in conjunction with the 'Assign Editor' permission will allow users to remove or replace Editors anywhere in the chain (provided the submission is in a state that allows this).

Additionally, the 'Unassign Editor' action link will now be more widely available for Editors with 'Unassign Other Editors' and/or 'Unassign Myself' permission. The link will now display consistently for a submission when the Final Disposition has not been set so long as the logged-in Editor has 'Unassign Other Editors' permission or has 'Unassign Myself' permission and is in the Editor Chain.

NOTE: If the logged-in user meets the above requirements but the submission is being edited, the 'Unassign Editor' action link will not be available.

To replace or remove an Editor from the Editor Chain, the Editor clicks the 'Unassign Editor' Action Link. The Editor is presented with the current Editor Chain and the actions available depend on the logged in user's permissions and the condition of the submission. The instructions on the left sidebar of this page may be customized in *PolicyManager*.

Sample Modify Editor Chain interface

Modify Editor Chain

[View Reviews and Comments](#)

Manuscript Number:
SALLYDEV120-D-15-00015

Title: Testing Editor Assignment Chain



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

Current Editor Assignment Chain

| | Step | Assigned Editor | Role | New Editor |
|----|----------|-------------------------------------------------|------------------|-------------------------------|
| 🗑️ | Editor 1 | Sally Editor Managing Editor | Managing Editor | None Selected |
| 🗑️ | Editor 2 | David Editor Section Editor | Section Editor | None Selected |
| 🗑️ | Editor 3 | Michael Editor Associate Editor | Associate Editor | Editor Search |

From this page, Editors may click the trashcan icon to simply remove an Editor or use the 'Role' and 'New Editor' drop down lists to select a replacement for one or more Editors. Once a valid change to the Editor Chain has been made, the Editor may proceed to send the notification letters. The 'Details' page will show the Editor replacement information:




Partial Details page, showing Editor replacement information – highlighted in pink text for reference only

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

A new merge field - **%EDITOR_REPLACEMENT%** - is added for use in Unassign Editor workflows that will insert the name of the Editor being replaced as well as his/her replacement into letters in the 'Invite/Assign/Unassign Editor' letter family.

TO CONFIGURE:

Publications that wish to allow Editors to use the new Editor replacement functionality must enable any of the following permission combinations:

-  'Unassign Other Editors' + 'Assign Editor' – This combination will allow users to unassign and replace unassigned Editors with new selections. Editors with this permission do not need to be in the Editor Chain.
-  'Unassign Myself' + 'Replace Editor' – This combination will allow users to remove their own assignment and replace themselves with another Editor.
-  'Unassign Myself' + 'Unassign Subordinate Editors' + 'Replace Editor' – This combination allows the logged-in user to remove their own assignment and assignments in the chain below him/her and replace the unassigned Editors with new selections.

NOTE: Editors with permission to 'Unassign Myself' and 'Unassign Subordinate Editors' without the 'Replace Editor' permission will only be able to remove their own assignment and assignments below them in the Editor Chain.

Sample Editor RoleManager showing the new sub-permissions of 'Unassign Myself'

Editor Assignment

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

Reviewer Invitations

- Invite Reviewers

To configure the instructions shown on the left sidebar of the 'Modify Editor Chain' page, go to 'Edit Instructions on the Modify Editor Chain Page' link in *PolicyManager*.

Sample part of PolicyManager

- ☐ **Questionnaire Policies**
 - [Create Custom Questions](#)
 - [Create Questionnaires](#)
 - [Edit Co-Author Questionnaire Instructions](#)

- ☐ **Additional Data Policies**
 - [Add/Edit Additional People Detail Fields](#)
 - [Add/Edit Additional Manuscript Detail Fields](#)
 - [Edit Additional Invitation Details](#)

- ☐ **Editor Assignment Policies**
 - [Set Editor Assignment Options](#)
 - [Define Editor Assignment Chain Templates](#)
 - [Set Editor Rotation Participants](#)
 - [Edit Instructions on Modify Editor Chain Page](#)
 - [Configure Automated Summary Reminders](#)

After clicking the link, the user will be able to enter custom text to be displayed when an Editor is modifying the Editor Chain:

Edit Instructions on the Modify Editor Chain Page

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

| Page | Instructions |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Modify Editor Chain | <p>Insert Special Character</p> <div style="border: 1px solid gray; padding: 5px;"><p>The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor Assignments as needed and send the selected letters.</p></div> <p>View Default Instructions Revert to Default Instructions</p> |

Proxy Registration Enhancements

In EM/PM version 12.1, the fields presented to Editors when proxy registering a new user are based on the fields configured for self-registration – for example, if a field is configured as “Hidden” for self-registration, it is not displayed to Editors when proxy registering a new user. Also, if a field is defined as “Required” for self-registration, it is displayed during the proxy registration process in red text with an asterisk as if it were required; however, the requirement is not enforced for Editors and they can successfully proxy register a new user without supplying complete information.

New in EM/PM version 12.2, a new ‘Configure Proxy Registration’ page is added to *PolicyManager* so publications can create a separate set of criteria collected during proxy registration. Additionally, the selected fields configured for proxy registration may be configured to be required so proxy registered users aren’t entered into the system with incomplete information.

NOTE: The new ‘Configure Proxy Registration’ page may not be available for publications that have some of the existing “behind-the-scenes” proxy registration security features in place. Your Aries Account Coordinator will be able to let you know if this feature is applicable.

Additionally, publications can now configure the suppression of the Register and Send Letter button so the Editor does not have the option to send a notification letter to the proxy registered user.

TO CONFIGURE:

Access the new ‘Configure Proxy Registration’ page in *PolicyManager* under the ‘Registration and Login Policies’ subheading. Similar to the existing ‘Edit Registration Fields’, an Administrator may choose which registration fields to require or hide during proxy registration. From this page, the proxy registration instructions may also be customized and the publication can choose whether the ‘Register User and Send Letter’ button is displayed for ‘Register and Select New Reviewer’ and ‘Register and Invite Author’.

Sample 'Configure Proxy Registration' page in PolicyManager

Configure Proxy Registration

This page is used to configure the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. You may configure whether or not the 'Register User and Send Letter' button is displayed, which fields the Editor will be forced to complete and the instructions that are displayed on the page. When you have made your selections please click 'Submit'.

Display 'Register User and Send Letter' Button

Select the checkbox to display the 'Register User and Send Letter' button on the Proxy Registration page. When a checkbox is not selected, the 'Register User and Proceed' button is displayed and when the Editor selects the associated link, the option to send the letter associated with the 'Proxy Register New User' event in ActionManager is no longer available on the proxy registration page.

Register and Select New Reviewer link from the Reviewer Selection Summary Page show the 'Register User and Send Letter' button

Register and Invite New Author link from the Author Selection Summary Page show the 'Register User and Send Letter' button

Configure Fields for Proxy Registration

Please select the fields you would like to present and require during the Proxy Registration process. Required fields will be labelled in red and designated with an asterisk on the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. Optional fields will be labelled in blue. Fields in bold text below are required by Editorial Manager and cannot be made optional by the publication.

| Required | Hidden | System Field |
|-------------------------------------|-------------------------------------|-----------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Title |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Given/First Name |
| <input type="checkbox"/> | <input type="checkbox"/> | Middle Name |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Family/Last Name |
| <input type="checkbox"/> | <input type="checkbox"/> | Degree |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Preferred Name |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Telephone Number |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Fax Number |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Secondary Telephone Number |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Secondary Telephone Number is for |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | E-mail |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Preferred Method of Contact |

Complete list of Registration Fields not shown in this figure.

Classifications and Keywords

Access to Personal Classifications (defined by an administrator) and Keywords (typed by the user) can be hidden from Editors when they proxy register a new user. You can set a maximum number of classifications that may be selected or keywords that may be added; making an item required enforces a minimum of at least one.

| | Hidden | Optional | Required (Minimum) | Maximum (leave blank for no limit) |
|---------------------------------|----------------------------------|----------------------------------|-----------------------|------------------------------------|
| Select Personal Classifications | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="text"/> |
| Enter Personal Keywords | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="text"/> |

Customize Proxy Registration Instructions

| Event | Instructions |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Proxy Register New User | <p>Insert Special Character</p> <p>You may register a new user and send that new user a custom Welcome letter, or choose not to send a letter. To begin the Proxy Registration process, please enter the following information:</p> <p style="text-align: right;">View Default Instructions Revert to Default Instructions</p> |
| Register and Select New Reviewer | <p>Insert Special Character</p> <p>Please enter key information about the person you are registering as a Reviewer.</p> <p style="text-align: right;">View Default Instructions Revert to Default Instructions</p> |
| Register and Invite New Author | <p>Insert Special Character</p> <p>Please enter key information about the person you are registering as an invited Author.</p> <p style="text-align: right;">View Default Instructions Revert to Default Instructions</p> |

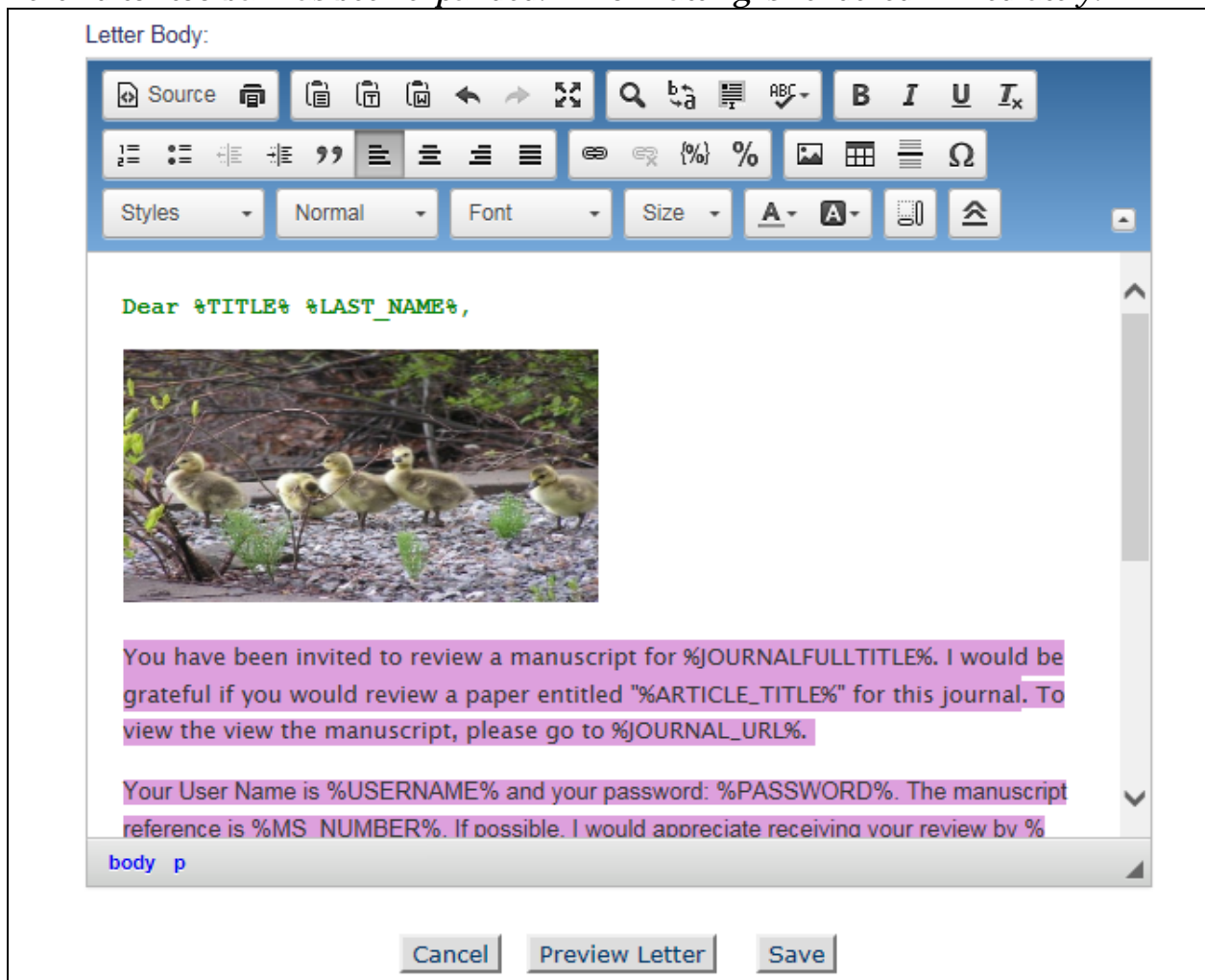
Rich Text Management for Letters

In EM/PM version 12.1, letters may be configured to support HTML on the 'Edit Letters' page of *PolicyManager*. HTML tags may be added manually to letter templates and users may see how the markup is rendered by clicking the 'Preview Letter' button. Additionally, previously uploaded images may be entered into HTML letters by clicking the 'Insert Image' link.

In EM/PM version 12.2, publications using HTML letters will now have access to a Rich Text Editor that will aid in letter formatting and will render HTML and images as a user is editing the letter. The Rich Text Editor is added to the Add/Edit HTML letter template interface in *PolicyManager* as well as on the 'Customize Letter' interface throughout the EM/PM system.


NOTE: After upgrade, it would be beneficial to examine any existing Rich Text (HTML) letters that are configured in *PolicyManager* to ensure proper formatting.

Sample Rich Text Editor interface on the Edit Letter template in PolicyManager, Rich Text Editor toolbar has been expanded. All formatting is rendered immediately.



The screenshot displays the 'Letter Body' editor interface. At the top, there is a blue toolbar with icons for Source, Undo, Redo, Find, and various text formatting options (Bold, Italic, Underline, Strikethrough). Below the toolbar are dropdown menus for Styles (set to 'Normal'), Font, and Size, along with color selection tools. The main text area contains the following content:

Dear %TITLE% %LAST_NAME%,






You have been invited to review a manuscript for %JOURNALFULLTITLE%. I would be grateful if you would review a paper entitled "%ARTICLE_TITLE%" for this journal. To view the view the manuscript, please go to %JOURNAL_URL%.

Your User Name is %USERNAME% and your password: %PASSWORD%. The manuscript reference is %MS_NUMBER%. If possible, I would appreciate receiving your review by %

body p

At the bottom of the editor, there are three buttons: 'Cancel', 'Preview Letter', and 'Save'.

The toolbar uses common icons to show formatting options. Each icon displays hover-over text that provides a short description of what the button does. Some of the standard EM/PM letter functions have also been added to the Rich Text editor toolbar, replacing the links that appear above the letter body field:

-  - 'Insert Custom Merge Fields'
-  - 'Insert System Merge Fields'
-  - 'Insert Image'




As in existing functionality, the user customizing the letter can select from the list of existing uploaded images, but cannot upload new ones when customizing the letter.

Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title. [\(more...\)](#)

[Back to PolicyManager](#)

| Letter Purpose ▲▼ | Letter Family Group by: ▲▼ | ActionManager Roles and Events | Letter Format | | |
|-------------------------------|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|---------------------------------------|-------------------------------|
| | | | Text | Rich Text (HTML) | All Formats |
| 10 day warning for review due | Reviewer Reminder | | <input type="radio"/> Edit | <input checked="" type="radio"/> Edit | Remove Hide |
| Accept | Decision | Assistant Editor - Final Disposition - Accept Assistant Editor - Final Disposition - Accept Managing Editor - Final Disposition - Accept Managing Editor (Kopie) - Final Disposition - Accept Managing Editor Type II - Final Disposition - Accept Production Administrator - Final Disposition - Accept | <input checked="" type="radio"/> Edit | <input type="radio"/> Edit | Remove Hide |
| Appeal Reject Decision | Ad Hoc From Author | | <input type="radio"/> Edit | <input checked="" type="radio"/> Edit | Remove Hide |

To edit a letter template using the Rich Text Editor, click the 'Edit' link in the 'Rich Text (HTML)' column of the 'Edit Letters' page. The Rich Text Editor toolbar will also be available on the 'Customize Letter' interface for Rich Text (HTML) letters. The 'maximize' icon in the upper right corner of the toolbar -  - will expand the display of the letter body to fill the size of the System Administrator window. The Rich Text toolbar can be expanded to reveal more formatting options or collapsed to show a smaller selection of popular letter formatting tools. The  icon will expand the toolbar and the  icon will collapse an expanded toolbar.

Sample Customize Letter interface for a Rich Text-configured letter. Rich Text Editor toolbar is collapsed.

Notify Users of Final Disposition - Accept Letter

Mary François Smith (Managing Editor)

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page.

| | |
|-----------------|--------------------------------------------|
| From: | "DEMO 11.0 Editorial" <trash1@ariessc.com> |
| To: | Mary François Smith, PhD |
| Letter Purpose: | Accept |
| Letter Subject: | <input type="text" value="Accept"/> |

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: bcc: Editors Assigned to Manuscript

Edward Editor, MD (Editor-in-Chief)

cc:

bcc:

Letter Body:

Styles Format Font

Your manuscript has been accepted and will now go to copy editing. Thank you.

There is a new option to allow Rich Text Editing of letters currently configured as ‘Text’ on the ‘Edit Letters’ page. Selecting this option will allow users customizing the text letter prior to sending to use the Rich Text Editor toolbar in the ‘Customize Letter’ interface by clicking the ‘Add Formatting’ link above the letter body.

Sample 'Text' letter template showing the new 'Allow sender to add Rich Text (HTML) formatting' option

Instructions ▼

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

Letter Purpose:

Subject:

Letter Family: ▼

Sender's E-mail Address: "DEMO 11.0 Editorial" <trash1@ariessc.com>
 Use Corresponding Editor's E-mail address
 Use Corresponding Production Editor's E-mail address

Additional Recipients

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

Automatically cc: bcc:

All Co-Authors
 Corresponding Editor
 Corresponding Production Editor

Send copies to the following addresses:
(Multiple addresses may be entered, separated by a semicolon)

cc:

bcc:

Allow choice on 'Send Letter' page The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:
 Display checkbox for co-Authors

Allow attachments

Allow sender to add Rich Text (HTML) formatting
Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

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

testing testing

Sample Customize Reviewer Invitation Letter interface: This is a Text letter, but the 'Allow sender to add Rich Text (HTML) formatting' option has been selected for the letter template. Clicking 'Add Formatting' will enable the Rich Text toolbar on the page. and sends the letter as an HTML-formatted letter instead of a plain text letter.

Customize Reviewer Invitation Letter

123 123 (REVIEWER)

All lines beginning with a number sign (#) are comments and are not sent. This file must be in either DOS or Unix linefeed format, not MacOS. Reviewer template - This is the template file for the E-Mail that is sent to a user when they are invited to review a submission.

From: "DEMO 11.0 Editorial" <trash1@ariessc.com>

To: 123 123

Letter Purpose: Reviewer Invitation

Letter Subject: Reviewer Invitation for "Testing Optional URI"

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc below. Multiple addresses can be included, separated by semicolons (;).

cc: bcc: Editors Assigned to Manuscript

Dave Lister (Managing Editor)

cc:

bcc:

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

```
Dear 123,

You have been invited to review a manuscript for Demo 12.2 Site.

I would be grateful if you would review a paper entitled "Testing Optional URI" for this journal.

The manuscript reference is DEMO121-D-15-00003. You can view the manuscript by clicking on the following link:

%VIEW_REVIEWER_PDF%

If you are unable to review this manuscript, please click on the following link to decline the invitation:

%DECLINE_REVIEW_INVITATION%

Please use the following link to accept the invitation, and to submit your comments concerning the manuscript:

%ACCEPT_REVIEW_INVITATION%
```

Activate Rich Text toolbar

TO CONFIGURE:

The Rich Text Editor toolbar is automatically available for any existing and newly added HTML letter.

To allow the option of using the Rich Text toolbar during letter customization, select the 'Allow sender to add Rich Text (HTML) formatting' checkbox on the Text letter template page in *PolicyManager* > 'Edit Letters'.

Discussion Forum for Reviewers

In EM version 12.1, Editors may be invited to participate in conversations with other invited Editors regarding a submission using EM's Discussion Forum feature.

New in EM version 12.2, Reviewers who have completed a Review for a submission will be able to participate in a Discussion Forum created just for Reviewers and Editors assigned to the submission. This is done by using a new 'Discussion Type' called 'Reviewer Consultation'.

The new Reviewer Discussion Forum feature essentially is just creating a new Discussion Type – the existing Discussion Forum functionality is retained. However, many Editorial Manager configuration pages have been modified to accommodate the new changes.

NOTE: Unlike discussions using the 'Editor Consultation' (existing Discussion Forum functionality), only one 'Reviewer Consultation' may be opened per submission.

Although Editors with 'Initiate and Manage Discussions' permission may manage a 'Reviewer Consultation' discussion, most of the handling of this type of discussion is automated to reduce the workload of Editors. Initiation of a 'Reviewer Consultation' discussion is configured in *PolicyManager* per Article Type on the 'Configure Automatic Discussion Initiation' page. The automated functionality of the 'Reviewer Consultation' is as follows:

- ✚ The 'Reviewer Consultation' is opened automatically when the first Editor for a new submission (Revision 0 only) is either assigned or agrees to handle a submission.
- ✚ All Editors and Reviewers assigned to the submission for all versions/revisions are added automatically to the discussion.
- ✚ The 'Reviewer Consultation' discussion remains open throughout all revisions unless an Editor with permission to manage discussions closes it.
- ✚ The 'Reviewer Consultation' discussion is concluded automatically when the Final Disposition is set for the submission.

Sample Reviewer Consultation Discussion page – Reviewer’s view

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

[Close](#)

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

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

Topic: Editors & Reviewers Forum

[View/Print All](#)

Comments:

[Post](#)

| Participant ▲▼ | Comments | Date ▲▼ |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Twink E. Jonesey, PhD | I will be on sabbatical for 4 months starting Feb 2, 2015 | Dec 12 2014 04:45PM |
| Ginger Rabelais (Reviewer 2) | This a formidable task | Dec 03 2014 11:05AM |
| Edward Browdy | This Corresponding Author for this submission is going on a research trip to Antarctica starting April 2015 and may be unavailable for periods of time (more...) | Dec 03 2014 11:04AM |
| Twink E. Jonesey, PhD | Okay, so who wants to take this one on? It's got a very short time span. | Dec 01 2014 03:03PM |

[Close](#)

NOTE: Editors with permission to manage discussions may invite other Editors to the ‘Reviewer Consultation’ discussion, even if they are not attached to the submission in any way. Outside Reviewers (not attached to the submission) may not be added to the discussion.

NOTE: If an Editor is unassigned or replaced in the Editor Chain, the unassigned or replaced Editor still remains an active participant in the ‘Reviewer Consultation’ discussion.

Sample Reviewer Consultation Discussion – Editor’s view. Editor has permission to manage discussions

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

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

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

[Details](#)

Topic:
 Editors & Reviewers Confab

Comments: [View/Print All](#)

| Participant | Comments | Date |
|------------------------------|------------------------------------------------------------------------|---------------------|
| Twink E. Jonesey, PhD | That's an excellent suggestion. Who can we get to implement this? | Jan 07 2015 10:49AM |
| Jack Bauer (Reviewer 1) | I agree with Ginger | Jan 06 2015 06:32PM |
| Ginger Rabelais (Reviewer 2) | As a frequent reviewer of this kind of article, I recommend... | Jan 06 2015 03:02PM |
| Twink E. Jonesey, PhD | Big Dog here, perhaps one of the Reviewers has a good idea about this. | Jan 05 2015 01:22PM |
| Mary Jones, PhD | Okay, what do you think of the current issue, Twinky? AKA Big Dog? | Jan 05 2015 01:02PM |

Editor Participants

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

Reviewer Participants

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

On the Editor’s view of the ‘Reviewer Consultation’ discussion page two grids organize the Editor and Reviewer participants. The Editor participant grid contains actions – submission visibility, participant status, Editor Role, ad hoc e-mail - as the Editor Consultation. The Reviewer Status grid depicts a summary of each Reviewer’s status with the submission. Editors with permission to manage discussions may add Editor participants or conclude the discussion before Final Disposition is set.

Any Reviewer who agrees to submit a Review for a submission is automatically added to the 'Reviewer Consultation' discussion, but remains an inactive participant until he or she submits a completed Review. As an inactive participant, a Reviewer who has only agreed or completed part of a Review will not receive notifications of new comments in the discussion.

Once a Reviewer becomes an active participant in a 'Reviewer Consultation' discussion, he or she remains an active participant throughout the life of the submission within EM. Reviewers who are unassigned or terminated from assignment for later Revisions remain included in the Discussion. Similarly, if a Reviewer is not invited to Review the current version of the submission but completed a Review for a previous Revision, that Reviewer remains an active participant in the Discussion.

As noted above, Editors with permission to manage discussions may manually conclude a 'Reviewer Consultation' any time during the life of a submission. Re-opening a concluded 'Reviewer Consultation' discussion will allow an Editor to add Reviewers to the discussion who may have completed Reviews while the discussion was closed. When re-opening a discussion, an Editor may convert the Reviewer Participants from 'Inactive' to 'Active' by ticking the appropriate box in the Reviewer Participants grid.

Sample Re-Open Discussion interface – red help text under the Reviewer Role emphasizes which Reviewers may be best suited as Active Participants

Re-Open Discussion for Manuscript Number: JANETDEV120-D-15-00004R1
Maney M. Alexander, PhD
"Bubble Science"

Topic

Comments

Editor Candidates

Page: 1 of 1 (7 total candidates) Display 25 results per page.

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

Page: 1 of 1 (7 total candidates) Display 25 results per page.

Reviewer Candidates

| Select | Reviewer Participant | Role | # Posts | Latest Post | Participant Status | Reviewer Number | Complete Review Submitted for Versions | Status of Most Recent Review Assignment |
|-------------------------------------|----------------------|----------------------------------------------------------------|---------|---------------------|--------------------|-----------------|----------------------------------------|-----------------------------------------|
| <input checked="" type="checkbox"/> | Jack Bauer | Reviewer <i>(Previous participant in the discussion)</i> | 1 | Jan 06 2015 06:32PM | Active | Reviewer 1 | R0 | R0: Review Complete |
| <input checked="" type="checkbox"/> | Ginger Rabelais | Reviewer <i>(Previous participant in the discussion)</i> | 1 | Jan 06 2015 03:02PM | Active | Reviewer 3 | R0 | R1: Agreed to Review |
| <input checked="" type="checkbox"/> | Ron Raptor | NB Reviewer <i>(Previous participant in the discussion)</i> | 0 | | Active | Reviewer 2 | R0, R1 | R1: Review Complete |
| <input type="checkbox"/> | George Bortnichak | Statistical Reviewer | 0 | | Inactive | Reviewer 4 | | R0: Terminated After Agreeing to Review |
| <input checked="" type="checkbox"/> | Sylvia W. Massimoto | Reviewer <i>(Potential active participant)</i> | 0 | | Inactive | Reviewer 6 | R1 | R1: Review Complete |
| <input type="checkbox"/> | Louie B. Nice, PhD | Reviewer <i>(This person is inactivated in the system)</i> | 0 | | Inactive | Reviewer 5 | R0 | R0: Review Complete |
| <input checked="" type="checkbox"/> | Xander Huckenpoehler | Reviewer <i>(Potential active participant)</i> | 0 | | None | Reviewer 7 | R1 | R1: Review Complete |
| <input type="checkbox"/> | Pilar Ramos | Reviewer <i>(Potential inactive participant)</i> | 0 | | None | Reviewer 8 | | R1: Agreed to Review |

A new deep link - **%REVIEWER_DISCUSSION_DEEP_LINK%** - may be added to the 'Reviewer Thank You' letter that is sent to Reviewers after completing a Review. Clicking the deep link from the letter will log the Reviewer into EM completely and automatically navigate the user to the 'Completed Assignments' folder. If the 'Reviewer Consultation' discussion has not been concluded for the submission, the 'Discussion' page will automatically open in a pop-up. If the discussion has been concluded, the Reviewer may access the closed discussion from the 'Discussions' link.

As with the Editor discussions (existing functionality), active participants may receive notifications about new posts that have been contributed to a discussion. The existing

%DISCUSSION_POST% merge field may now be used in Discussion Forum letter family notifications sent to Reviewers.

TO CONFIGURE:

First, a ‘Reviewer Consultation’ Topic Template must be configured. In the ‘Discussion Forums’ section of *PolicyManager*, click the ‘Configure Discussion Topic Templates’ link. On the ‘Configure Discussion Topic Templates’ page, click the ‘Add’ button to add a new template.

Sample Configure Discussion Topic Templates page – a new ‘Type’ column is added to indicate whether a topic is for Editor or Reviewer discussions

Configure Discussion Topic Templates

Listed below are the Discussion Topic Templates configured for your publication. To create a new template, click the ‘Add’ button. [\(more...\)](#)

Require Editors to choose a Discussion Topic Template on the Initiate Discussion page for an Editor Consultation discussion. If this checkbox is not selected, users can either type in a Topic and Initial Comment, or select a Topic template to pre-populate the Topic and Initial Comments boxes.

| Order | Type | Description | Actions | |
|--------------------------------|-----------------------|--------------------------|------------------------|-------------------------------|
| <input type="text" value="1"/> | Editor Consultation | Default Topic Template | Remove | Edit |
| <input type="text" value="2"/> | Editor Consultation | Nu Template | Remove | Edit |
| <input type="text" value="3"/> | Reviewer Consultation | Reviewer Forum | Remove | Edit |
| <input type="text" value="4"/> | Editor Consultation | Instruction Spacing | Remove | Edit |
| <input type="text" value="5"/> | Editor Consultation | Multi Line Template Name | Remove | Edit |
| <input type="text" value="6"/> | Editor Consultation | Master Topic Template | | Edit (Master) |

[Configure Discussion Forum Settings](#)

[Configure Automatic Discussion Initiation](#)

[Back to PolicyManager](#)

On the ‘Add Discussion Topic Template’ page, select ‘Reviewer Consultation’ from the Discussion Topic Template Type drop down list. Once ‘Reviewer Consultation’ is selected as the Topic Type, some options that are usually available for Editor Discussions (existing functionality) will be disabled – the initial comments and topic will not be able to be edited when initiating the discussion.

Sample Add Discussion Topic Template page when 'Reviewer Consultation' has been selected as the type

Add Discussion Topic Template

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

Discussion Topic Template Type Reviewer Consultation ▼

[Open Special Character Palette](#)

| | |
|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Discussion Topic Template Name | Reviewer Forum |
| <i>'Initiate Discussion' Page Custom Instructions</i> | |
| Topic | <input type="text"/> <input type="checkbox"/> Allow user to modify Topic name when initiating a discussion |
| Initial Comments | <input type="text"/> <input type="checkbox"/> Allow user to modify Initial Comments when initiating a discussion |
| Default Editor Participant Permissions | <input checked="" type="checkbox"/> View Reviews and Comments <input checked="" type="checkbox"/> Download Files (source and companion) <input type="checkbox"/> View Draft Decision Letter |
| Editor Access to 'Details' Link | <input checked="" type="checkbox"/> Display 'Details' link in Submissions with Active Discussions folder and on Discussion page. Select the Details Page Layout that participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts.' <input type="text" value="Editorial Kitchen Sink"/> ▼ |
| Editor Discussion Letters | Select the Letter to send asking Editors to participate: <input type="text" value="Please Participate"/> ▼ Select the notification letter to send to Editors when comments are posted: <input type="text" value="New Post"/> ▼ <input type="radio"/> Notify discussion initiator only <input checked="" type="radio"/> Notify all active Editor participants |
| Reviewer Discussion Letters | Select the Letter to send asking Reviewers to participate: <input type="text" value="Please Participate"/> ▼ Select the notification letter to send to Reviewers when comments are posted. <input type="text" value="New Post"/> ▼ |

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

Cancel Submit

When creating the 'Reviewer Consultation' topic template, users will still be able to select the type of submission access permissions ('View Reviews and Comments',

'Download Files', 'View Draft Decision Letter', and 'Details' page layouts) for Editors who are part of the 'Reviewer Consultation' discussion. As with the Editor Discussions, Administrators will also be able to select the letters and notifications sent to Reviewers. After the 'Reviewer Consultation' template has been created, Administrators will be able to associate the Reviewer template with Article Types on the 'Configure Automatic Discussion' page in *PolicyManager*. From here, Administrators may decide which Article Types use 'Reviewer Consultation' and select which 'Reviewer Consultation' topic template is used.

Sample Configure Automatic Discussion page – the 'First Editor Confirmed' column contains the 'Reviewer Consultation' configurations

Configure Automatic Discussion Initiation

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

| Article Type | Discussion Trigger | Editor Agrees to Assignment | First Editor Confirmed |
|---------------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Original Study | | <input type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: Select All Clear All Editor Editor in Chief Managing Editor Test For Brenda Editor Consultation Topic Templates: Please Choose a Topic Template | <input checked="" type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: Reviewer Forum |
| Editorial's | | <input checked="" type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: Select All Clear All Editor Editor in Chief Managing Editor Test For Brenda Editor Consultation Topic Templates: Instruction Spacing | <input checked="" type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: Reviewer Forum |
| Super Quick - Everything Hidden | | <input type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: Select All Clear All Editor Editor in Chief Managing Editor Test For Brenda | <input type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: Please Choose a Topic Template |

After the 'Reviewer Consultation' discussion template has been configured for use with the desired Article Type, the discussion will be automatically initiated when the first Editor is confirmed (assigned or agreed to take the assignment).

Further configuration may be done on the 'Configure Discussion Forum Settings' page in *PolicyManager*. Custom instructions may be entered and Administrators may decide the expiration policy on the existing **%DISCUSSION_DEEP_LINK%** and the new **%REVIEWER_DISCUSSION_DEEP_LINK%**.

Configure Discussion Forum Settings

Custom Instructions

[Open Special Character Palette](#)

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

These are the custom instructions for the Discussion Forum.

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

Deep Link Expirations

Please specify how long the Discussion Deep Links (%DISCUSSION_DEEP_LINK% and %REVIEWER_DISCUSSION_DEEP_LINK%) remain active. To keep the links active indefinitely, do not check any of the boxes. If all boxes are checked, each link expires when the first criterion is met.

Expire link after clicks

Expire link after days

Expire when discussion is concluded

To grant Editors permission to manage discussions (add Editor participants, conclude discussion), the select the 'Initiate and Manage Discussions' option in Editor *RoleManager*.

Part of Editor RoleManager:

| |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><input type="checkbox"/> Discussion Forums</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> View All Discussions<input checked="" type="checkbox"/> Initiate and Manage Discussions<ul style="list-style-type: none"><input type="radio"/> My Discussions Only<input checked="" type="radio"/> All Discussions |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

The PowerGrid

In EM/PM version 12.0 a 'Beta Grid' option was added to the 'Search Submissions Selection Criteria' page. This feature was selected by default for all publications and applies an updated, interactive grid interface to Search Submissions Results. Users have the option to hide columns they do not want to use, resize the columns, reorder the columns in the grid, and freeze columns so the information stays in place during horizontal scrolling. Additionally, the column headers are fixed so column information is available during vertical scrolling.

New in EM/PM version 12.2, the 'Beta Grid' is now a formal feature referred to as the 'PowerGrid' and is applied to the following folders on the Editor Main Menu:

- 'New Submissions'
- 'Revised Submissions'
- 'New Submissions Requiring Assignment'
- 'Revised Submissions Requiring Assignment'
- 'View All Assigned Submissions'
- 'View All Assigned Submissions with Editors Invited – None Yet Assigned'

The PowerGrid is turned on by default for all of the folders listed above. An button underneath the 'Quicklinks' menu in the upper left corner of the PowerGrid toggles the user back to the "traditional" EM grid.

Sample New Submissions folder using PowerGrid

The screenshot shows the PowerGrid interface for 'New Submissions - Kristin QA'. A green arrow points to a toggle button labeled 'Toggle to "traditional" grid'. The grid displays submission details for 'Original Research' by 'Buzz Aldrin'.

| Action | Manuscript Number | Article Type | Section/Category | Article Title | Author Name | Initial Date Submitted | Status Date | Current Status |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------|--------------------|-------------------------------|---------------|------------------------|--------------------|---------------------|
| <ul style="list-style-type: none"> View Submission Duplicate Submission Check (29%) Details ▾ Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Send E-mail Linked Submissions Google Scholar Title Search Corresponding Author ORCID S | | Original Research | American Behaviour | Testing Duplicate Submissions | Buzz Aldrin ▾ | Sep 18 2013 2:25PM | Sep 18 2013 2:25PM | Received by Journal |
| <ul style="list-style-type: none"> View Submission CrossCheck/iThenticate Results (86%) Details ▾ Initiate Discussion History Technical Check | | | | | | | | |

Also new for the PowerGrid in 12.2 is the ability for a Saved Search to also save the user's layout preference (PowerGrid only). Users accessing a shared search for the first time will have the results loaded into the search creator's layout preference. Users who opt out of the PowerGrid on the 'Search Submissions Selection Criteria' page, however, will see the results in the traditional grid, per their preference.

TO CONFIGURE:

No configuration necessary. The PowerGrid is turned on upon upgrade for the specified folders on the Editor Main Menu.

Automatic Withdrawal of Declined Revisions

In EM version 12.1, an Author may choose to decline to revise a submission. If the Author declines to revise, the submission will remain in the Editor's 'Submissions Out for Revision' folder indefinitely until an Editor either rescinds the decision or manually sets a Final Disposition to 'Withdrawn'. This creates a potentially inefficient and confusing folder, since both declined revisions and legitimate revisions-in-progress are displayed here.

New in EM version 12.2, publications may have the Final Disposition automatically set to 'Withdrawn' after a set number of days on submissions where an Author has declined to revise. When the Final Disposition is set automatically set to 'Withdrawn', the submission moves out of the 'Submissions Out for Revision' folder and into the 'All Submissions with Final Disposition (Withdrawn)' folder, just like when the Final Disposition is set to 'Withdrawn' manually. This is done through a new page in *PolicyManager*: 'Configure Automatic Withdrawal of Declined Revisions'.

TO CONFIGURE:

Go to the new 'Configure Automatic Withdrawal of Declined Revisions' page in *PolicyManager* under the 'Editor Decision Policies' subheading:

☐ **Reviewer and Editor Form Policies**

Manuscript Rating Question Configuration
[Edit Manuscript Rating Questions](#)
[Overall Manuscript Rating Question Settings](#)
[Edit Manuscript Rating Instructions](#)

Reviewer Recommendation Policies
[Edit Reviewer Recommendation Terms](#)
[Create/Edit Custom Review Questions](#)
[Create/Edit Review Forms](#)
[Match Review Forms to Article Types and Reviewer Roles](#)
[Set Pending Assignments Deep Link Expiration](#)
[Set Reviewer Recommendation Deep Link Expiration](#)

Editor Decision Policies
[Edit Editor Decision Terms](#)
[Create Editor Forms](#)
[Configure Editor Forms](#)
[Editor Manuscript Rating Question Configuration](#)
[Configure Options for Review Rating](#)
[Configure Automatic Withdrawal of Declined Revisions](#)

Once on the page, select the checkbox and enter the desired amount of time after an Author has declined to revise that the Final Disposition will be automatically set to 'Withdrawn'.

Configure Automatic Withdrawal of Declined Revisions

Use the option below to automatically set the Final Disposition to 'Withdrawn' one or more days after the Author declines to revise the submission. When this feature is enabled, the Final Disposition is automatically set to 'Withdrawn' during the nightly batch process the specified number of days after the Author declines to revise. If there is a very large number of submissions to be withdrawn in a single batch cycle, the process may be spread over two or more batch cycles to ensure optimal performance. If this option is not enabled, submissions remain in the Editor's 'Submissions Out for Revision' folder until the final disposition is manually set to Withdrawn.

Note: If the Editor rescinds the decision or the Author reinstates the submission (after declining to revise), the Final Disposition will not automatically be set to Withdrawn.

Automatically set the Final Disposition to Withdrawn days after the Author declines to revise

Cancel

Submit

Submission Flag History

In EM version 12.1, publications may use Submission Flags to supplement their Editorial and Production workflows. Some publications might use the Submission Flags to mark important milestones in the submission workflow or indicate that a submission may need attention.

In EM version 12.2, Submission Flag History is recorded for each submission (depending on the individual flag configuration). The Flag History will record and show when each flag was turned on and off for the submission. A new *RoleManager* permission – ‘View Submission Flag History’ – is required to view historical flag information in the interface.

Once enabled, a Submission Flag History section is added to the following pages:

- Correspondence History
- Submission Flags pop-up
- Flag legend pop-up

The Submission Flag History shows each flag icon (and flag description) that has ever been turned on for the manuscript. The following additional information is also shown:

- ✚ The revision number of the submission when flag was turned on.
- ✚ The date the flag was turned on and the operator who turned it on.
- ✚ The date the flag was turned off (if it has been turned off) and the operator name who turned it off.
- ✚ The number of days the flag was turned on. If the flag is still being used, the number is displayed in parentheses and in red text to indicate the elapsed number of days.
- ✚ Additionally:
 - Only flags configured to ‘Display in History’ are shown in the interface. However, the flag history is captured in the database for all submission flags once the journal upgrades to version 12.2.
 - If the flag is turned on/off multiple times, each occurrence is captured and displayed in a separate row.
 - Flags that have never been associated with the manuscript are not shown, to avoid cluttering the page.
 - The flag description is written into the Flag History as text, in case the flag description is ever changed in the future.
 - If a user was proxying for another user when turning the flag on or off, it is designated as such in the grid.

Sample Correspondence History page – Submission Flag History has been enabled in PolicyManager and the user has permission to view the flag history

History for Manuscript Number: ARIES-D-14-57316
"Super Cool Article"

[Status History](#) [Correspondence History](#) [Submission Flag History](#)
[Switch to Status Type View](#)

STATUS HISTORY

| Status Date | Document Status | Edit Submission Status | Production Status | Status Days | Role Family | Revision | Operator |
|--------------------|----------------------|------------------------|-------------------|-------------|-------------|----------|----------------|
| Jan 15 2015 2:18PM | Under Review | | | ---- | REVIEWER | 0 | Stacey Lavelle |
| Jan 15 2015 2:18PM | Decision Rescinded | | | ---- | EDITOR | 0 | Stacey Lavelle |
| Jan 14 2015 6:26AM | Completed Reject | | | 1 | EDITOR | 0 | Rebecca Klahm |
| Jan 14 2015 6:26AM | Reject | | | ---- | REVIEWER | 0 | Rebecca Klahm |
| Jan 14 2015 2:52AM | Under Review | | | ---- | REVIEWER | 0 | Joe Carrino |
| Jan 14 2015 2:35AM | Decision in Process | | | ---- | REVIEWER | 0 | Joe Carrino |
| Jan 5 2015 5:19PM | Under Review | | | 8 | REVIEWER | 0 | Joe Carrino |
| Dec 29 2014 7:35PM | Editor Assigned | | | 6 | EDITOR | 0 | Joe Carrino |
| Dec 29 2014 7:38AM | | Incomplete with Editor | | ---- | EDITOR | 0 | Ed Office |
| Dec 22 2014 1:57AM | Manuscript Submitted | | | 7 | EDITOR | 0 | Macy Jackson |
| Dec 22 2014 1:48AM | Needs Approval | | | ---- | AUTHOR | 0 | Macy Jackson |
| Dec 22 2014 1:47AM | Building PDF | | | ---- | AUTHOR | 0 | Macy Jackson |
| Dec 22 2014 1:24AM | Incomplete | | | ---- | AUTHOR | 0 | Macy Jackson |

CORRESPONDENCE HISTORY

| Correspondence Date | Letter | Recipient | Status | Revision | Operator |
|---------------------|----------------------------------------------------------|---------------------|------------------|----------|----------------|
| Jan 21 2015 12:05AM | Reviewer Reminder - (2) Before Due Date | Viggo Dunst, Ph.D. | Under Review | 0 | Tara Barcello |
| Jan 15 2015 2:18PM | Author Notice Decision Rescinded | Macy Jackson | Under Review | 0 | Stacey Lavelle |
| Jan 14 2015 6:26AM | Reviewer Notification of Reject Decision | Brian K Hammer, PhD | Completed Reject | 0 | Rebecca Klahm |
| Jan 14 2015 6:26AM | Editor Decision - Reject | Macy Jackson | Reject | 0 | Klahm |

SUBMISSION FLAG HISTORY

| Flag | Flag Name | Revision | Date Turned On | Operator | Date Turned Off | Operator | Days |
|------|-------------------------|----------|-----------------------|--------------------|-----------------------|-------------------|------|
| | Subscan Complete | 1 | Jan 28, 2015 3:35 PM | James Miller, PhD | | | (6) |
| | Potential Subscan Issue | 1 | Jan 25, 2015 2:00 PM | James Miller, PhD | Jan 28, 2015 11:12 AM | Stacey Lavelle | 3 |
| | Ed Office, Rebecca Bye | 1 | Jan 25, 2015 11:40 AM | Rebecca Bye | | | (9) |
| | Open subscan discussion | 1 | Jan 16, 2015 8:29 AM | Xianchun Wang, PhD | Feb 3, 2015 12:00 PM | Xianchun Wang PhD | 18 |
| | Potential Subscan Issue | 0 | Dec 17, 2014 2:00 PM | James Miller, PhD | Dec 23, 2015 11:12 AM | James Miller, PhD | 6 |
| | Sent Back to Authors | 0 | Nov 13, 2014 10:13 AM | Rebecca Bye | Nov 18, 2014 11:00 AM | Rebecca Bye | 5 |

[Status History](#) [Correspondence History](#) [Submission Flag History](#)
[Switch to Status Type View](#)

Sample Submission Flags pop-up – user has permission to view Submission Flag History

Submission Flags - Manuscript Number AmyTest-81-10-151R1 "Spec 10.0-38 Round 1 use case 2 test 1"

Submission Flag History

Check the box of the flag(s) you want to display for this submission. ([more...](#))

SET SUBMISSION FLAGS

| Display | Flag | Flag Name |
|-------------------------------------|------|---------------------|
| <input type="checkbox"/> | ▼ | 2 Purple z |
| <input checked="" type="checkbox"/> | ♣ | 2 Purple Clubs |
| <input checked="" type="checkbox"/> | 😊 | Forest Green Smiley |
| <input type="checkbox"/> | ✓ | Red Check |
| <input type="checkbox"/> | ☢ | Black Biohazard |
| <input type="checkbox"/> | ✂ | Blue Scissors |
| <input type="checkbox"/> | ♦ | Blue Diamond |
| <input type="checkbox"/> | ❄ | Red Snowflake |
| <input type="checkbox"/> | ✈ | Black AirPlane |
| <input type="checkbox"/> | 🎱 | Magic 8 Ball |
| <input type="checkbox"/> | ! | My fun flag |

SUBMISSION FLAG HISTORY

| Flag | Flag Name | Revision | Date Turned On | Operator | Date Turned Off | Operator | Days |
|------|---------------------|----------|---------------------|----------------------------|---------------------|----------------------------|------|
| ♣ | 2 Purple Clubs | 1 | 2015-06-11 19:34:31 | Mary Mary Editor, PhD, MDd | | | (4) |
| 🎱 | Magic 8 Ball | 1 | 2015-06-11 19:34:23 | Mary Mary Editor, PhD, MDd | 2015-06-11 19:34:38 | Mary Mary Editor, PhD, MDd | 1 |
| 😊 | Forest Green Smiley | 1 | 2015-06-11 19:34:16 | Mary Mary Editor, PhD, MDd | | | (4) |

The 'Submission Flags' pop up interface is accessed by a user with appropriate permission clicking the 'Set Flag' icon (▼), any flag currently associated with a

submission on the 'Details' page, or the 'Add/Edit Submission Flags' link on the 'Details' page.

The 'Flag Legend' page is available for users who are able to view flags, but do not have permission to turn Submission Flags on or off. If the user also has the new 'View Submission Flag History' permission, they will be able to see historical flag data on the 'Flag Legend' page.

Sample 'Flag Legend' page for user with permission to View Submission Flags and Submission Flag History

Flag Legend

Submission Flag History

SEELCTED SUBMISSION FLAGS

| Flag | Flag Name |
|-----------------------------------------------------------------------------------|---------------------|
|  | 2 Purple Clubs |
|  | Forest Green Smiley |

SUBMISSION FLAG HISTORY

| Flag | Flag Name | Revision | Date Turned On | Operator | Date Turned Off | Operator | Days |
|-------------------------------------------------------------------------------------|---------------------|----------|------------------------|----------------------------|------------------------|----------------------------|------|
|  | 2 Purple Clubs | 1 | 06/11/2015 19:34:31 | Mary Mary Editor, PhD, MDd | | | (4) |
|  | Magic 8 Ball | 1 | 06/11/2015 19:34:23 | Mary Mary Editor, PhD, MDd | 2015-06-11 19:34:38 | Mary Mary Editor, PhD, MDd | 1 |
|  | Forest Green Smiley | 1 | 06/11/2015 19:34:16 | Mary Mary Editor, PhD, MDd | | | (4) |

The 'Assigned Custom Flags' table (CUSTOM_FLAG_ASSIGNMENT) will record when a flag is turned on or off for reporting purposes.

TO CONFIGURE:

To turn on the Submission Flag History display, each desired Submission Flag must be individually selected to be included. On the 'Add/Edit Customized Submission Flag' page (accessed by clicking the 'Add' button or editing an existing flag on the 'Create

Customized Submission Flags' page in *PolicyManager*), select the 'Display in History' checkbox for the flags you wish to display in the interface.

Sample 'Add Customized Submission Flag' page

Add Customized Submission Flag

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On Submission Flags' and 'Turn Off Submission Flags' can display/turn off Submission Flags for any manuscript on the Submission Flags page (accessible from the Details page). The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both. If you associate this Flag with an Additional Manuscript Details (AMD) field, these Editors and Publishers can also display/turn off this Flag on pages containing that AMD field. When a flag is attached to a submission, it will be displayed next to the 'Details' action link on all pages where the 'Details' link is displayed (Editor and Publisher Roles must have permission to 'View Submission Flags').

Flag Icon: [Insert Special Character](#)

Flag Name: *Maximum 256 characters*

Flag Type
 Editorial
 Production

Associate with AMD Field

Display in History When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.

| | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|----|----|----|----|----|----|----|----|---|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|
| ! | ! | ! | ! | ! | ! | ! | ! | # | # | # | # | # | # | # | # | # | # | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ |
| 0/ | 0/ | 0/ | 0/ | 0/ | 0/ | 0/ | 0/ | & | & | & | & | & | & | & | & | & | & | | + | + | + | + | + | + | + | + | + |

To view the Submission Flag History, the user must have the new 'View Submission Flag History' permission enabled in Editor or Publisher *RoleManager*.

Sample Editor RoleManager (partial)

- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- General Searching and Viewing
- Edit Submission
- Discussion Forums
- Transmittal Form
- Sending E-mail
- Viewing and Editing People Data
- Flag Icons
 - View Submission Flags
 - Turn On Submission Flags
 - Turn Off Submission Flags
 - View Submission Flag History
 - View People Flags
 - Turn On People Flags
 - Turn Off People Flags
- Proxy Activities
- Administrative and Reporting Functions
- Cross-Publication Login
- ProduXion Manager

Sample Publisher RoleManager

Edit Role Definition

Role Name:*

Check the functions that this role is permitted to perform.

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

- ⊕ General Searching and Viewing
 - ⊖ Flag Icons
 - View Submission Flags
 - Turn On Submission Flags
 - Turn Off Submission Flags
 - View Submission Flag History
 - View People Flags
 - Turn On People Flags
 - Turn Off People Flags
- ⊕ Transmittal Form
- ⊕ Edit Submission
- ⊕ Cross-Publication Login
- ⊕ ProduXion Manager

Ad Hoc E-mail Enhancements

In EM/PM version 12.1, users may send ad hoc e-mails to users associated with a submission. The ad hoc e-mails must be configured as templates in 'Edit Letters' prior to sending with defined recipients and senders. To send an ad hoc e-mail, users must click the 'Send E-mail' link and select from a list of the pre-configured letters.

New in EM/PM version 12.2, an envelope icon (✉) is added next to people names on the 'Details' page for Editors & Publishers to give users a more convenient way to send ad hoc letters to people associated with a submission.

After clicking the envelope icon on the 'Details' page, the user will be presented with all letters in the appropriate ad hoc family that have been configured to use the new Recipient option on the 'Edit Letters' page in *PolicyManager*: 'User Selects Recipient using ✉ icon'. If there is only one letter configured for use with this option, the user will be brought to the 'Customize Letter' interface.

NOTE: Letters configured with the 'User Selects Recipient using ✉ icon' may also show in the ad hoc letter drop down list when the 'Send E-mail' action link is clicked in folders. This only applies when there are one or more Recipients options selected in addition to 'User Selects Recipient using ✉ icon'.

NOTE: If 'User Selects Recipient using ✉ icon' is the only Recipient option selected for a letter, the letter is available via the new icon, but is not available via the 'Send E-mail' link.

Sample 'Details' page – a letter in the Ad Hoc From Editor family has been configured to use the new recipient option

Details for Manuscript Number: DEMO112-D-14-00007 "Testing Editor Decision"

[Additional Manuscript Details](#)
[Abstract](#)
[Manuscript Notes](#)
[Production Notes](#)
[Editors](#)
[Reviewers](#)
[Alternate Reviewers](#)
[Reviewers Proposed by Editors](#)
[Additional Information](#)

| | | |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| Additional Manuscript Details: | Add/Edit Additional Manuscript Details Top | |
| Fast Track | NO | Display 'Expedited' Flag <input type="checkbox"/> |
| Press Release Candidate | <input type="text" value="Please Choose"/> | Display 'Supplement Article Possibility' Flag <input type="checkbox"/> |
| Quality of language | <input type="text" value="Please Choose"/> | |
| DOI: | <input type="text"/> | |
| Corresponding Author: | <input checked="" type="checkbox"/> Buzz Aldrin <input type="text" value="CA UNITED STATES"/> [Proxy] | |
| Full Title: | Testing Editor Decision | |
| Corresponding Author E-Mail: | trash427@ariessc.com | |
| Author Comments: | | |
| Short Title: | <input type="text"/> | |
| Article Type: | Original Research | |
| Section/Category: | <input type="text"/> | |
| Keywords: | active vitamin D | |
| Classifications: | CROPS | |
| Requested Editor: | <input type="text"/> | |
| Technical Check: | Technical Check Information | |
| Initial Date Submitted: | Sep 04 2014 03:17PM | |
| Editorial Status Date: | Sep 04 2014 03:25PM | |
| Current Editorial Status: | Received by Editor | |

To allow publications to set up a 'blank' letter template (no Subject, empty body) for 'User Selects Recipient using icon' letters, users are now able to save templates with an empty subject line. The ability to save a letter template without a subject line has been extended to all Letter Families.

Additionally, the 'Ad Hoc from Publisher' letter template page has been enhanced to display a 'Publisher Roles That Can Send This Letter' option. This is a multi-selector box containing all Publisher Roles and similar to the existing 'Editor Roles That Can Send This Letter' selector box available for 'Ad Hoc from Editor' letters. The default at upgrade for existing letters is 'ALL PUBLISHER ROLES', and defaults to 'None Selected' when adding a new letter.

Sample Add 'Ad Hoc From Publisher' Letter' page

Add 'Ad Hoc From Publisher' Letter

The Custom Instructions will display to the sender on the page where the letter is sent. To change them, make changes in the 'Custom Instructions' box and click the 'Save' button.

Custom Instructions:

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

Letter Purpose:

Subject:

Letter Family:

Publisher Roles That Can Send This Letter

- None Selected
- ALL PUBLISHER ROLES Select All
- Production Team
- Printer Clear All
- Copyeditor

Sender's E-mail Address:

- Use E-mail address of user triggering the Correspondence
- "DEMO 11.0 Editorial" <trash1@ariessc.com>
- "DEMO 11.0 Production" <trash2@ariessc.com>

Recipient:

- "DEMO 11.0 Editorial" trash1@ariessc.com
- User Selects Recipient using icon
- Corresponding Editor
- Corresponding Production Editor
- Display text box so sender can insert an e-mail address
- Display the following e-mail address for the recipient:
(Multiple addresses may be entered, separated by a semicolon)

TO CONFIGURE:

Ad hoc letters must either be in the 'Ad Hoc from Editor' or 'Ad Hoc from Publisher' family to be eligible for use with this feature. Each letter to be used with the icon must be configured in 'Edit Letters' to use the recipient option 'User Selects Recipient using icon'. Also, the Editor or Publisher Role must have (existing) permission to 'Send Ad Hoc E-mail'.

Sample 'Ad Hoc from Editor' letter template in PolicyManager>'Edit Letters'

Edit 'Ad Hoc From Editor' Letter

HTML formatting tags may be used. It is not necessary to use the <HTML> or <BODY> tags.

Custom Instructions: Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the

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

Letter Purpose: Copyright Transfer Request

Subject: Copyright Transfer Request

Letter Family: Ad Hoc From Editor

Editor Roles That Can Send This Letter: None Selected, ALL EDITOR ROLES, Managing Editor, Editor-in-Chief, Associate Editor. [Select All](#), [Clear All](#)

Sender's E-mail Address: Use E-mail address of user triggering the Correspondence, "DEMO 11.0 Editorial" <trash1@ariessc.com>, "DEMO 11.0 Production" <trash2@ariessc.com>

Recipient: "DEMO 11.0 Editorial" trash1@ariessc.com, User Selects Recipient using icon, Corresponding Editor, Corresponding Production Editor

***ActionManager* Events Column for Edit Letters**

In EM/PM version 12.1, Administrators cannot quickly review how letters have been configured for use with different Roles under *ActionManager*; either they must review the *ActionManager* configuration for each Role in turn, or click the 'Remove' or 'Hide' links in the 'Edit Letters' grid to trigger a warning that lists all *ActionManager* associations.

New in EM/PM version 12.2, a new 'ActionManager Roles and Events' column is added to the 'Edit Letters' grid in *PolicyManager*. The column will list the Roles in *ActionManager* currently using the letter template as well as the event for which the letter is configured. Each Role is displayed as a link to the respective *ActionManager* table. Clicking the link will navigate the user away from the 'Edit Letters' grid and into that Role's *ActionManager* event table.

In this release, only ActionManager Events are listed – the page does not list any Decision Terms that are linked to letters; those can be reviewed in one place under *PolicyManager*>*Edit Editor Decision Terms*.

Sample 'Edit Letters' grid in PolicyManager

Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title. [\(more...\)](#)

[Back to PolicyManager](#)

| Letter Purpose ▲▼ | Letter Family Group by: ▲▼ | ActionManager Roles and Events | Letter Format | | |
|-------------------------------------------|----------------------------------|----------------------------------------------------------------|----------------------------------|-----------------------|---------------|
| | | | Text | Rich Text (HTML) | All Formats |
| Editor Declines to Handle Assignment | General | Editor - Editor Declines Invitation from an Editor | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Editor Declines Invitation from an Editor | <input type="radio"/> | <input type="radio"/> | |
| | | Managing Editor - Editor Declines Invitation of New Submission | <input type="radio"/> | <input type="radio"/> | |
| | | Managing Editor - Editor Declines Invitation from an Editor | <input type="radio"/> | <input type="radio"/> | |
| Editor Initiate Author Rebuttal | General | Author - Rescind Decision | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Author - Initiate Rebuttal | <input type="radio"/> | <input type="radio"/> | |
| | | Managing Editor - Rescind Decision | <input type="radio"/> | <input type="radio"/> | |
| Editor Invitation | Invite/Assign/Unassign Editor | Editor - Editor Invited for Assignment | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| Editor Notice All Reviews Complete | General | Editor - Required Reviews Complete | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Required Reviews Complete | <input type="radio"/> | <input type="radio"/> | |
| Editor Notice an Assignment was Undone | Invite/Assign/Unassign Editor | Editor - Editor Unassigned Notification | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Editor Unassigned Notification | <input type="radio"/> | <input type="radio"/> | |
| | | Managing Editor - Editor Unassigned Notification | <input type="radio"/> | <input type="radio"/> | |
| Editor Notice Author Agrees to Assignment | General | Editor - Author Agrees to Invitation | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Author Agrees to Invitation | <input type="radio"/> | <input type="radio"/> | |
| | | Managing Editor - Author Agrees to Invitation | <input type="radio"/> | <input type="radio"/> | |
| Editor Notice Author Approve Changes | General | Editor - Author Returns Submission to Publication | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Author Returns Submission to Publication | <input type="radio"/> | <input type="radio"/> | |
| | | Managing Editor - Author Returns Submission to Publication | <input type="radio"/> | <input type="radio"/> | |
| Editor Notice Author Declines Assignment | General | Editor - Author Declines Invitation | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Author Declines Invitation | <input type="radio"/> | <input type="radio"/> | |
| | | Managing Editor - Author Declines Invitation | <input type="radio"/> | <input type="radio"/> | |
| Editor Notice Completed Review | General | Editor - Late Review | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| Editor Notice Reviewer Agrees to Review | General | Editor - Reviewer Agree | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Reviewer Agree | <input type="radio"/> | <input type="radio"/> | |
| Editor Notice Reviewer Declines to Review | General | Editor - Reviewer Decline | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Reviewer Decline | <input type="radio"/> | <input type="radio"/> | |
| Editor PDF Build Error | General | Editor - Editor PDF Build Error | <input checked="" type="radio"/> | <input type="radio"/> | Remove Hide |
| | | Editor in Chief - Editor PDF Build Error | <input type="radio"/> | <input type="radio"/> | |
| | | Managing Editor - Editor PDF Build Error | <input type="radio"/> | <input type="radio"/> | |

TO CONFIGURE:

No configuration necessary.

View Publication Charges Data Permissions

In EM/PM version 12.1 publications may present Corresponding Authors with a processing or publication charge at the time of submission. With Editorial Manager, these charges may be handled by an external payment system that has been fully integrated into the submission process. A letter may be sent to the Author when the 'Payment Due' event is triggered. It can include a deep linking merge field (**%APC_EXTERNAL_LINK%**) that displays a link to the URL used to access the Payment page in the external Payment System. If an Editor, Publisher, or Reviewer who has access to the History page goes to the Correspondence History grid on that page, and can view this letter, they can copy and paste this link into a browser's address bar, which allows them to see sensitive information about the amount the Author is being charged for the submission.







Additionally, if the Payment Due API is triggered for a submission that an Author chose to submit as 'Open Access' (publication charges will be collected), the system displays Publication Charges status icons and descriptions in various folders and pages. Currently, all Editors/Publishers with permission to access those folders and pages can view these status icons and descriptions.

New in EM/PM version 12.2, two new *RoleManager* permissions are added for Editors and Publishers: "**View Publication Charges Status**" & "**View Publication Charges Correspondence and Links**". These permissions allow publications to control Publication Charges information visibility within Editorial Manager. Additionally, a new "Publication Charges" Letter Family is added to *PolicyManager*.

NOTE: Upon upgrade, all existing letter templates that are currently configured to be sent for the two ActionManager events related to Publication Charges ('Publication Charges Payment Requested' & 'Publication Charges Payment Complete') are converted from their current letter family (most likely the 'General' letter family) to the new 'Publication Charges' letter family.

NOTE: After upgrade, the Reviewer version of the Correspondence History will suppress all letters in the Publication Charges family at all times.

The "**View Publication Charges Status**" permission enables the display of the Publications Charges status icons and/or the Publication Charges Status section of various folders and pages. When this permission is turned on for an Editor or Publisher (and they have access to a Publication Charges Submission), the Publication Charges Status will be displayed in the following places:

-  Custom Details
-  Transmittal Form
-  All Submissions with Editor's Decision
-  My Assignments with Decision
-  All Submissions with Final Disposition Accept
-  All Completed Conference Submissions

- ✚ Accepted Submissions
- ✚ Search Submissions – Search Results
- ✚ Submission Tasks Assigned to Me
- ✚ Submission Tasks I Have Assigned
- ✚ View All Submissions in Production
- ✚ Production Status Grid
- ✚ Production Initiated – No Tasks Assigned
- ✚ View All Production Tasks with Authors
- ✚ View All Submissions with Production Completed

The “**View Publication Charges Correspondence and Links**” permission enables the display of letters in the ‘Publication Charges’ letter family on the Correspondence History page. Additionally, Editors and Publishers with this permission will be able to access relevant Publication Charges links and correspondence while proxying as an Author.

NOTE: If the user does not have the ‘View Publications Charges Correspondence and Links’ permission, they will still be able to receive letters and view in the Publication Charges family if they are the primary recipient.

The **%APC_EXTERNAL_LINK%** deep-linking merge field is enhanced in version 12.2 to accommodate the new permissions: Only the original recipients of letters can view the deep link in the sent letter and the plain text of the URL when viewed from the Correspondence History.

TO CONFIGURE:

Editorial Manager’s integration with Publication Charges processing must already be enabled by your Account Coordinator to use these new permissions.

The two new permissions are located in the ‘General Searching and Viewing’ sections of the Editor and Publisher *RoleManager* pages.

Sample Editor RoleManager page

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

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

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

- New Submissions**
- Editor Assignment**
- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**
- General Searching and Viewing**
 - Use Editorial Details Layout
 - Search All Manuscripts
 - Search Only Assigned Manuscripts
 - Share Saved Searches
 - View Linked Submission Groups
 - Create/Edit Linked Submission Groups
 - Set Active/Inactive Status on Linked Submission Groups
 - Enable Review Sharing for Linked Submission Groups
 - View COS Scholar Universe Author Profiles
 - Search Similar Articles in MEDLINE
 - Search Author Publications in MEDLINE
 - Initiate Similarity Check
 - View Similarity Check Results
 - View Duplicate Submission Check Results
 - View Publication Charges Status**
- Bibliographic Search
 - Google Scholar
 - ScholarUniverse - Author Search (MaxPrecise)
 - ScholarUniverse - Author Search
- View Editorial Status History
- View Submission Production Status History
- View Submission Production Task Assignment History
- View Schedule Group Production Task Assignment History
- View Editorial Correspondence History
 - Edit Letter when Resending
- View Publication Charges Correspondence and Links**
- View Submission Production Correspondence History
- View Schedule Group Production Correspondence History
- Add/Edit External Correspondence
 - Add Attachments to External Correspondence
- View All Submissions
- View...

Rest of page unchanged

Upon upgrade, all existing letters associated with the two ActionManager events related to Publication Charges ('Publication Charges Payment Requested' & 'Publication Charges Payment Complete') will be converted to the new 'Publication Charges' letter family. To ensure the proper display/restriction of access to Publications Charges-related correspondence, all new letters for this feature should be configured in the 'Publication Charges' letter family.

Sample Add Letter page

Add 'General' Letter

Please type (or paste) a text-formatted letter into the Letter Body box below. This default letter should not include HTML tags. To incorporate HTML tags, click 'Save' on this page to save the text-formatted letter and then select the 'HTML format' radio button from the 'Edit Letters' page and click the Edit link. HTML tags may then be added.

Letter Purpose:

Subject:

Letter Family:

General

Ad Hoc From Reviewer

Author Invitation

Author Reminder

Batch E-mail

Co-Author Communications

Communications to Author

Decision

Discussion Forum

Editor Reminder

Enterprise Analytics Reporting

Fees And Payments

General

Invite/Assign/Unassign Editor

Production

Production Reminder

Publication Charges

Reviewer Invitation

Reviewer Notification

Reviewer Reminder

Terminate Assignments