

CONFIDENTIAL AND PROPRIETARY

Aries Systems Corporation



Release Notification

**Editorial Manager/Preprint Manager
6.1 Release Notification**

Subject to Change

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GENERAL ENHANCEMENTS

Automatic Reviewer Role Assignment for New Registrations

In current functionality, when new users register for Editorial Manager they are not automatically assigned a Reviewer Role. Office administrators must go to the *Search People – Update Information* page after the fact, mark the person “Available as a Reviewer” and then assign a Reviewer Role, so that the new user is available to Editors for peer review selection.

Under new functionality, publications may elect to have a Reviewer Role be automatically assigned when new users register for EM. If this feature is enabled, all new user registrations will automatically be assigned to the Reviewer Role designated in PolicyManager and marked “Available as a Reviewer”. This setting applies to self-registered users, proxy-registered users, imported users, and Corresponding Author registrations.

When this feature is enabled, users will no longer see the question: “Available as a Reviewer?” on the *Registration* page. Instead, they will automatically be marked as “Available to Review” and assigned the Reviewer Role specified in PolicyManager. All of this is transparent to the user.

The screenshot shows a form titled "Institution Related Information" with a light blue background. The form contains the following fields and options:

- Position: Text input field
- Institution: Text input field
- Department: Text input field
- Street Address: Three stacked text input fields
- City: Text input field
- State or Province *: Text input field
- Zip or Postal Code *: Text input field
- Country *: Dropdown menu with the text "Please choose a country"
- Address is for *: Radio button options for Work, Home, and Other

A black arrow points to the "Address is for" field. In the top right corner of the form area, there is a link that says "Insert Special Character".

NOTE: The “Available as Reviewer?” question is also suppressed on the *Update my Information* page, but remains visible on the *Search People – Update Information* page accessed by Editor Roles with appropriate RoleManager permission.

Similarly, when the editorial office proxy-registers a new user, the person is automatically assigned to the Reviewer Role specified in PolicyManager. Note the Reviewer Role can still be changed on this page (to another Role or to ‘None’).

Proxy Registration

Please enter key information about the person you are registering.

Insert Special Character

User Information
Insert Special Character

Reviewer Role *

Reviewer

Default Login Role: Reviewer

Insert Special Character

Personal Information
Insert Special Character

Title

Dr.

(Mr., Mrs., Dr., etc.)

First Name *

Maggie

Middle Name

Last Name *

Labanca

Degree

MD

(Ph.D., M.D., Jr., etc.)

E-mail Address *

maggie@aol.com

If entering more than one e-mail address, use a semi-colon between each address (e.g., joe@thejournal.com;joe@yahoo.com)
 Entering a second e-mail address from a different e-mail provider decreases the chance that SPAM filters will trap e-mails sent to you from online systems. [Read more.](#)

Country *

Please choose a country

NOTE: Existing users (i.e. people who were registered before the new feature is enabled in version 6.1) are not automatically given a Reviewer Role when this option is activated.

TO CONFIGURE:

Go to PolicyManager and click the new Enable Automatic Reviewer Role Assignment link in the 'Registration and Login Policies' section. To enable Automatic Reviewer Role Assignment, select the radio button next to 'Automatically Assign Reviewer Role on Registration:' and then choose a role from the drop-down list.

Enable Automatic Reviewer Role Assignment for New Registrants

Publications can choose to have the system automatically assign a Reviewer Role to all new registrants. If you would like all new registrants in your Publication to be assigned a Reviewer Role in addition to the default Author Role, please select the "Automatically Assign Reviewer Role on Registration" radio button below. Then, select a Reviewer Role from the drop down menu to be assigned as the Reviewer Role for all new registrants of your Publication.

Note: This does not apply to existing registrations. Only new registrations will automatically receive the Reviewer role.

Do Not Automatically Assign a Reviewer Role on Registration

Automatically Assign Reviewer Role on Registration:

Please Select a Role

Please Select a Role

Reviewer

Biostat Reviewer

Cancel


Submit

FOR IJRS (Inter-Journal Resource Sharing) LINKED PUBLICATIONS:

When a user registers (or is registered) in one database, all publications in the IJRS group are updated with the new user record. When IJRS syncing occurs, any records not

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currently in one of the IJRS publications will be automatically imported. Upon import into a publication with the “Automatically Assign Reviewer Role” option selected, the selected Reviewer Role is automatically assigned to the new record in the publication.

Hide Manuscript Submission Interface

In PM version 6.0, there is an Author RoleManager permission ‘Hide Submission Interface’ (Production Tracking customers only). Publications that use Preprint Manager for production tracking, but do not use Editorial Manager for manuscript submission, would use this option so that Authors do not see extraneous folders on the Main Menu. When this permission is enabled, the only folders visible to Authors on the *Author Main Menu* are *Current Task Assignments* and *Completed Production Task Assignments*.

New in EM/PM version 6.1, this feature is made available to all customers of EM/PM. In addition to the ‘Hide Submission Interface’ permission being made available to all users, this permission is further enhanced so that the entire *Author Main Menu* can be displayed to the Author, *except for the Submit New Manuscript link*. This allows the Author to submit invited manuscripts, but not unsolicited manuscripts. This feature is turned off when the publication upgrades to version 6.1, and must be configured as described below.

TO CONFIGURE:

To hide the Submit New Manuscript link on the *Author Main Menu*, go to Author RoleManager and select the checkbox ‘Hide Manuscript Submission Interface’.






NOTE: Authors on EM-only publications will see a blank menu if this option is selected without the sub-option selected as well.

To Hide the Submit New Manuscript link while allowing the other *Author Main Menu* folders to appear, select both the ‘Hide Manuscript Submission Interface’ permission and the ‘Display Invited Manuscript Folders’ permission and click the ‘Submit’ button to save your changes.

Edit Role Definition

Role Name: Author

Check the functions that this role is permitted to perform.

- View Status Date
- View Current Status
- Send Ad Hoc E-mail
- Search Similar Articles in MEDLINE
- Display "Alternate Contact Information" Link on Main Menu
- Display "Unavailable Dates" Link on Main Menu
- Hide Manuscript Submission Interface
 - Display Invited Submission Folders
-  Order Electronic Reprints
-  View WebFirst Pages
 -  View Subscriber Version of WebFirst
 -  View Pay-per-View Version of WebFirst
-  View Reference Checking Results

Cancel

Submit

For EM Publications with both options selected, Authors will see the following *Author Main Menu*:

Author Main Menu

[Alternate Contact Information](#)
[Unavailable Dates](#)

Invited Submissions

[My New Invitations](#) (1)
[My Accepted Invitations](#) (5)

New Submissions

[Submissions Sent Back to Author](#) (2)
[Incomplete Submissions](#) (41)
[Submissions Waiting for Author's Approval](#) (10)
[Submissions Being Processed](#) (39)

Revisions

[Submissions Needing Revision](#) (5)
[Revisions Sent Back to Author](#) (1)
[Incomplete Submissions Being Revised](#) (6)
Revisions Waiting for Author's Approval (0)
[Revisions Being Processed](#) (5)
[Declined Revisions](#) (1)

Completed

[Submissions with a Decision](#) (44)

For EM/PM or just PM Publications with both options selected, Authors will see the following *Author Main Menu*:

Author Main Menu

[Alternate Contact Information](#)
[Unavailable Dates](#)

Production Task Assignments

[Current Task Assignments](#) (5)

Invited Submissions

[My New Invitations](#) (1)
[My Accepted Invitations](#) (5)

New Submissions

[Submissions Sent Back to Author](#) (2)
[Incomplete Submissions](#) (41)
[Submissions Waiting for Author's Approval](#) (10)
[Submissions Being Processed](#) (39)

Revisions

[Submissions Needing Revision](#) (5)
[Revisions Sent Back to Author](#) (1)
[Incomplete Submissions Being Revised](#) (6)
Revisions Waiting for Author's Approval (0)
[Revisions Being Processed](#) (5)
[Declined Revisions](#) (1)

Completed

[Submissions with a Decision](#) (44)
[Completed Production Task Assignments](#) (6)

Author Questionnaires

In EM version 6.0, the Administrator can create Custom Submission Questions (“Questions”) in PolicyManager that Authors will see at the ‘Additional Information’ submission step when submitting a manuscript. In current functionality:

- Questions can be configured to ‘Display’ or be ‘Hidden’ on a per Article Type basis, for both New Submissions and Revised Submissions (Set “Additional Information” Preferences on the *Edit Article Type* page).
- Questions can be configured to display on the Transmittal Form, and/or in the Search/Manage Conference Submissions interface.
- Questions are configured as ‘Optional’ or ‘Required’ for Authors when submitting a manuscript, and/or on the Transmittal Form. This particular setting is not currently configurable on a per Article Type basis.

In EM version 6.1, this feature is improved significantly, giving publications the utmost flexibility in determining the information to be collected from Authors at the ‘Additional Information’ submission step. This is achieved with the introduction of a new concept – the ‘Author Questionnaire’ (“Questionnaire”). A Questionnaire is comprised of any number of Questions from a customized ‘master list’ of Custom Submission Questions. To implement a Questionnaire, the Administrator would:

1. Create a ‘master list’ of Questions (or modify the existing set of Custom Submission Questions used in version 6.0)
2. Correlate the Questions with one or more Questionnaires
3. Apply the Questionnaire(s) to one or more Article Types

This allows the publication to collect different pieces of information from Authors for different Article Types, and customize the parameters for the responses (i.e. Author’s answers to the questions):

1. Response Type (e.g. Text, Date, Integer, Decimal, Notes, or List)
2. A ‘List’ Response Type can be further customized to be a drop-down list box, radio buttons, checkboxes, or a scrollable selector box.
3. Default values and/or default text for Author’s response
4. Maximum field length for responses (i.e. character count)
5. Whether an answer is Required or Optional for Author submission
6. Customized instructions for the Author response
7. Whether or not a Question and response are displayed on the Manuscript Details page
8. Whether or not a Question and response are displayed, can be edited and/or is required on the Transmittal Form

Example 1: Sample page an Author might see for Questions configured with ‘Text’, ‘Date’, and ‘Integer’ Response Types.

New Submission

Frequently Asked Questions

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- Submit Abstract
- Enter Keywords
- Select Classifications
- Additional Information**
- Enter Comments
- Suggest Reviewers
- Oppose Reviewers
- Attach Files

Please Enter The Following

Additional Information is Required for Submission.

Please respond to the questions/statements below.

Please enter any additional areas of expertise you may have.

[Instructions](#)

Character Count: 25

Surgery, Vascula Limit 20 Characters

Please enter the date you began your submission.

[Instructions](#)

05/23/2008 (mm/dd/yyyy)

Please enter the total page count of your submission.

[Instructions](#)

Character Count: 4

1000

Previous Next

Example 2: Sample page an Author might see for Questions configured with ‘Decimal’, ‘Notes’, and ‘Drop-down List’ Response Types:

New Submission

[Frequently Asked Questions](#)

- [Select Article Type](#)
- [Enter Title](#)
- [Add/Edit/Remove Authors](#)
- [Enter Keywords](#)
- [Select Classifications](#)
- [Additional Information](#)
- [Enter Comments](#)
- [Suggest Reviewers](#)
- [Oppose Reviewers](#)
- [Attach Files](#)

Please Enter The Following

Additional Information is Required for Submission.

Please respond to the questions/statements below.

Please enter the impact factor of our journal.

[Instructions](#)

Character Count:
3

Answer Required: Limit 3 Characters

Please enter the e-mail addresses of all contributing Authors.

[Instructions](#)

Character Count: 25

Answer Required: Limit 20 Characters

Have you attached a copy of the Copyright Transfer Form?

[Instructions](#)

Answer Required:

Example 3: Sample page an Author might see for Questions configured with ‘Radio Button List’, ‘Checkbox List’, and ‘Selector Box List’ Response Types:

New Submission

[Frequently Asked Questions](#)

Select Article Type

Enter Title

Add/Edit/Remove Authors

Submit Abstract

Enter Keywords

Select Classifications

Additional Information

Enter Comments

Attach Files

Please Enter The Following

Additional Information is Required for Submission.

Please respond to the questions/statements below.

Have you attached a copy of our User Agreement?

[Instructions](#)

Answer Required:

Please select a response

Yes, I am perfect.

No, I cannot follow directions.

Please select all that apply:

[Instructions](#)

Answer Required:

Submission contains color images

Submissions contains lineart and/or tables

User Agreement Form attached

Copyright Transfer Form attached

[Select All](#) [Clear All](#)

Select all values that apply:

[Instructions](#)

Answer Required:

Submission contains color images
 Submissions contain lineart and/or tables
 I have attached a copy of the Copyright Transfer Form
 I have attached a copy of the User Agreement

[Select All](#) [Clear All](#)

Authors are required to enter their responses in the proper formats as defined in PolicyManager.

Example 4: A sampling of response formatting errors made by the Author, and the error text shown.

New Submission

Frequently Asked Questions

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- Submit Abstract
- Enter Keywords
- Select Classifications
- Additional Information**
- Enter Comments
- Suggest Reviewers
- Oppose Reviewers
- Attach Files

Please Enter The Following

Additional Information is Required for Submission.
Please respond to the questions/statements below.

Please enter any additional areas of expertise you may have.
[Instructions](#)
Character Count: 25

Answer Required: Limit 20 Characters **Character limit exceeded**

Please enter the date you began your submission.
[Instructions](#)

Answer Required: **Incorrectly formatted date**
(mm/dd/yyyy)

Please enter the total page count of your submission.
[Instructions](#)
Character Count: 4

Answer Required: **Incorrectly formatted integer**

Please enter the impact factor of our journal.
[Instructions](#)
Character Count: 4

Answer Required: Limit 3 Characters **Incorrectly formatted decimal Character limit exceeded**

Please enter the e-mail addresses of all contributing Authors.
[Instructions](#)
Character Count: 25

Answer Required: Limit 20 Characters **Character limit exceeded**

Have you attached a copy of the Copyright Transfer Form?
[Instructions](#)

Answer Required: **Please select a response**

Previous Next

Example 5: Another sampling of response formatting errors made by the Author, and the error text shown.

New Submission

[Frequently Asked Questions](#)

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- Submit Abstract
- Enter Keywords
- Select Classifications
- Additional Information**
- Enter Comments
- Suggest Reviewers
- Oppose Reviewers
- Attach Files

Please Enter The Following

Additional Information is Required for Submission.
Please respond to the questions/statements below.

Have you attached a copy of our User Agreement?

[Instructions](#)
Answer Required: Please select a response
 Yes, I am perfect.
 No, I cannot follow directions. Please select a response.

Please select all that apply:

[Instructions](#)
Answer Required: Submission contains color images
 Submissions contains lineart and/or tables
 User Agreement Form attached
 Copyright Transfer Form attached Please select no less than 2 value(s).

[Select All](#) [Clear All](#)

Select all values that apply:

[Instructions](#)
Answer Required: Submission contains color images
 Submissions contain lineart and/or tables
 I have attached a copy of the Copyright Transfer Fom
 I have attached a copy of the User Agreement Please select no less than 1 value(s) and no more than 4 value(s).

[Select All](#) [Clear All](#)

NOTE: If a Question is required for submission, and the Author does not respond in the proper format, he can proceed to other submission steps but will not be allowed to build the submission PDF (the final submission step) without answering all Questions in the proper format.

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 *Manuscript Details* pages.

If your publication is using a Custom Details Layout, you should confirm whether or not this information is displayed (if you want it to display) on the *Edit Details Page Layout* page in PolicyManager.

Question	Response
Please list your areas of expertise. *	Surgery
Please select all that apply. *	Submission contains color images; Copyright Transfer Form is attached; Conflict of Interest Form is attached
Please Enter Submission Date. *	06/26/2006
Please enter the total page count. *	24
Please enter Impact Factor of Journal *	2.2
Please enter notes regarding other Authors that assisted in creating your submission: *	All belong to same institution.

Cancel Save and Close Additional Manuscript Details

Editors and Publishers with appropriate permission also have access to all Questions and Author responses on the Transmittal Form:

- If a Question is not configured to be editable on the Transmittal Form from the *Create Custom Submissions Questions* page, Author responses are displayed as basic text under the 'Value' column according to the existing functionality used to display Journal Defined General Metadata Field responses.
- If a Question is configured to be editable on the Transmittal Form from the *Create Custom Submissions Questions* page, Author responses are displayed in editable text fields under the 'Value' column. Multiple values submitted for a response are concatenated into one element and separated by semi-colons for transmittal to third-party production systems.

Manuscript Geographic Region Of Origin	UNITED STATES	help
Please list your areas of expertise. *	Surgery, Vascular Surgery, Cardiac	help
Please enter the date you began your submission. *	06/26/2006 (mm/dd/yyyy)	help
Please enter the total page count of the submission. *	1000	help
Please enter Impact Factor of Journal *	1.2	help
Please enter notes regarding other Authors that assisted in creating your submission: *	All belong to same institution.	help
Does the submission contain color images? *	No - submission does not contain color images - Negative response	help
Have you attached a copy of the Copyright Transfer Form? *	<input checked="" type="checkbox"/> Yes, I am perfect. <input type="checkbox"/> No, I don't follow instructions.	help
Please select all that apply. *	<input checked="" type="checkbox"/> Submission contains color images. <input checked="" type="checkbox"/> Submission contains lineart and/or tables. <input checked="" type="checkbox"/> I have attached a copy of the Copyright Transfer Form.	help
Please select all that apply. *	<input checked="" type="checkbox"/> I have attached a copy of the User Agreement Form. <input type="checkbox"/> Submission contains color images <input type="checkbox"/> Submission contains lineart and/or tables <input type="checkbox"/> Copyright Transfer Form is attached <input type="checkbox"/> User Agreement Form is attached	help
I have read and understand the Updated Registered User Agreement Form and agree to be bound by all of its terms.	<input checked="" type="checkbox"/>	

Transmittal form for the JOURNAL test site.

Cancel Save Changes Proof & Print Proceed

TO CONFIGURE:

When publications upgrade to version 6.1, all existing Custom Submission Questions in version 6.0 will automatically be 'translated' to the new configuration. Administrators do not need to change anything in PolicyManager, and the Questions will continue to function as implemented in version 6.0. However, if you want to take advantage of the new features, some adjustments to the configuration are required.

Go to PolicyManager and click the [Create Custom Submission Questions](#) link in the

‘Submission Policies’ section. You will be taken to an enhanced version of the *Create Custom Submission Questions* page; this is the “master list” of Questions. If you were using Custom Submission Questions in version 6.0, the Questions will be listed on this page when you upgrade to version 6.1. If you were not using this feature in version 6.0, no Questions will be listed on this page when you first upgrade to version 6.1.

NOTE: You can Edit a Question used in version 6.0 by subtly changing its wording. This is permitted, but you should take care not to change the meaning of the Question in such a way that past Author responses to the Question are affected.

Once a list of Questions has been created, you can click the Create Author Questionnaire link to create the Questionnaire.

Create Custom Submission Questions

Listed below are the customized questions/fields which may be displayed as part of an Author Questionnaire. You can specify whether the field should be included on the Transmittal Form.

A question may be removed unless it has been used. If a field has been used but is now obsolete, it may be inactivated by clicking the Edit link and selecting the Hide checkbox.

To Add a new field, click the 'Add' button.

Add

Description

Does submission meet the correct word count limits?

Does submission contain color images?

Has a copy of our User Agreement Form been included with the submission?

Has a copy of our Conflict of Interest Form been included with the submission?

Has a copy of our Copyright Transfer Form been included with the submission?

Actions

Remove Edit

Remove Edit

Remove Edit

Remove Edit

Remove Edit

Add



[Create Author Questionnaires](#)

[Return to PolicyManager](#)

[Return to Editor Main Menu](#)

NOTE: Item Ordering has been removed from this page; ordering is now done on the Author Questionnaire configuration page.

UPGRADE NOTE: As mentioned previously, all Questions in use for version 6.0 will be retained when the publication upgrades to version 6.1. The upgrade script will create a pre-configured “Author Questionnaire”, which will include the publication’s existing Question configuration (e.g. question order, displayed for particular Article Types, etc.). Version 6.0 ‘legacy’ Custom Submission Questions will be assigned a ‘Notes’ Response Type by default upon upgrade. Any text contained in the existing ‘Question’ field is carried over and displayed in the ‘Question’ field, and any text contained in the ‘Default Text for Author Response’ field is carried over and displayed in the ‘Default Value for Field’ field.

On the *Create Custom Submission Questions* page, click the 'Add' button to create a new Question in the 'master list', or click the Edit link to modify a Question that existed in version 6.0. The *Add/Edit Custom Submission Question* page is modified to support several new elements:

1. 'Instructions for Author Response' – If you enter text here, it is available to the Author by clicking the Instructions hyperlink next to the Question at the Additional Information submission step.
2. A Question may become outdated over time. You can 'retire' a Question by selecting the 'Hide' checkbox. The Question must be removed from all Questionnaires before it can be hidden. Hidden Questions are not available for selection on the new *Configure Author Questionnaires* 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.
 - '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.
 - '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.
 - '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 Question and Author response displays on the *Manuscript Details* page by default. If you do not want the Question and response to display on the *Details* page, select the 'Hide' checkbox in the grid. You may also enter Help text that would be available via the *Details* page.

Add Custom Submission Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of an Author Questionnaire used at the Additional Information step in the Submit Manuscript function. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Custom Submission Question is no longer available for selection in an Author Questionnaire.

Author responses must be configured to use a specific Response Type: **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 requires the Author to select from a list of responses configured by the Site Administrator.

You may then specify if the field should be displayed on the Transmittal Form, and whether the field is required and/or editable on the Transmittal Form. Help Text on the Transmittal Form is optional.

Question: [Insert Special Character](#)

Instructions for Author Response: [Insert Special Character](#)

Hide: When you **Hide** a Custom Submission Question, the question is deactivated (not available for use with new Author Questionnaires).

Response Type: Text

Maximum Field Length:

(A value from 1 to 200)

Default Value for Field:

If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.

None
 Single Value (enter value below)
[Insert Special Character](#)

Options:

Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. 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, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

Page	Hide	Editable	Required	Help Text
Manuscript Details	<input type="checkbox"/>	N/A	N/A	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>

NOTE: A Question cannot be hidden once it has been added to an Author Questionnaire. The question must be removed from all Questionnaires it before it can be hidden.

Selecting the 'List' option from the Response Type drop-down refreshes the page to display a [View/Edit Values for List](#) link, where you will define the list of possible values the Author can choose from when answering the Question. There is also a drop-down list with four 'List display' options, so you can specify how the Author is presented with the list of possible values at the Additional Information step:

1. 'Drop-down list (Allows for a null or single value selection)' – The Author would see a drop-down list of allowable values to choose from. He can select one or more values from the drop-down list.

Response Type: List [View/Edit Values for List](#)

Display List As:

Drop-down list (Allows for a null or single value selection)

2. 'Radio Buttons (Allows for a single value selection; requires a default value)' – The Author would see a set of radio buttons, where he must select one answer.

Response Type: List [View/Edit Values for List](#)

Display List As:

Radio Buttons (Allows for a single value selection; requires a default value)

3. 'Checkboxes (Allows for multiple value selection; good for 1-5 values)' – The Author will see a list of selectable checkboxes, where he can select one or more answers. You can also specify the minimum/maximum number of selections the Author is allowed to make.

Response Type: List [View/Edit Values for List](#)

Display List As:

Checkboxes (Allows for multiple value selection; good for 1-5 values)

Require no less than value(s) to be selected as a response.

Require no more than value(s) to be selected as a response.

4. 'Scrolling Selector (Allows for multiple value selection; good for more than 5 values)' – The Author would see a scrolling selector box, where he can select one or more answers. You can also specify the minimum/maximum number of selections the Author is allowed to make.

Response Type: List [View/Edit Values for List](#)

Display List As:

Scrolling Selector (Allows for multiple value selection; good for more than 5 values)

Require no less than value(s) to be selected as a response.

Require no more than value(s) to be selected as a response.

Edit Custom Submission Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of an Author Questionnaire used at the Additional Information step in the Submit Manuscript function. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Custom Submission Question is no longer available for selection in an Author Questionnaire.

Author responses must be configured to use a specific Response Type: **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 requires the Author to select from a list of responses configured by the Site Administrator.

You may then specify if the field should be displayed on the Transmittal Form, and whether the field is required and/or editable on the Transmittal Form. Help Text on the Transmittal Form is optional.

Question: [Insert Special Character](#)

Please select all that apply:

Instructions for Author Response: [Insert Special Character](#)

PC users can select multiple values by holding down the Control key 'Ctrl' while clicking with their mouse.

Hide: When you **Hide** a Custom Submission Question, the question is deactivated (not available for use with new Author Questionnaires).

Response Type: List [View/Edit Values for List](#)

Display List As:

Scrolling Selector (Allows for multiple value selection; good for more than 5 values)

- Require no less than 1 value(s) to be selected as a response.
- Require no more than 5 value(s) to be selected as a response.

Options:
Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. 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, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

Page	Hide	Editable	Required	Help Text
Manuscript Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Insert Special Character

Clicking the [View/Edit Values for List](#) link navigates the Administrator to one of two versions of the *Configure Values for List* page, depending on whether the List Display option selected on the previous page requires definition of a default value. From these pages the Administrator can customize the options available for Author responses from a list, indicate the order in which the answer choices are displayed, and specify the default value.

Example 1: No default value required.

Configure Values For List

Enter the values to appear in a list on the pages where the field is displayed. The description is displayed to the user, but is not transmitted if the field is included on the Transmittal Form. Entering a Description is optional, and should only be entered if you want it to display (alongside the list value) in the list as an aid for the Author.

Display Order	Value	Description		
<input type="text" value="1"/>	Submission contains color images.	Affirmative response	Remove	Edit
<input type="text" value="2"/>	Copyright Transfer Form is attached.	Affirmative response	Remove	Edit
<input type="text" value="3"/>	Conflict of Interest Form is attached.	Affirmative response	Remove	Edit

[Insert Special Character](#)

Value:

Description:
Maximum 100 characters

Example 2: Default value required.

Configure Values For List

Enter the values to appear in a list on the pages where the field is displayed. The description is displayed to the user, but is not transmitted if the field is included on the Transmittal Form. Entering a Description is optional, and should only be entered if you want it to display (alongside the list value) in the list as an aid for the Author.

Please select the default value (which is pre-selected when a drop-down or radio button list is displayed to users):

Display Order	Select Default Value	Value	Description		
<input type="text" value="1"/>	<input checked="" type="radio"/>	Please select a response			
<input type="text" value="2"/>	<input type="radio"/>	Submission contains color images.	Affirmative response	Remove	Edit
<input type="text" value="3"/>	<input type="radio"/>	Copyright Transfer Form is attached.	Affirmative response	Remove	Edit
<input type="text" value="3"/>	<input type="radio"/>	Conflict of Interest Form is attached.	Affirmative response	Remove	Edit

[Insert Special Character](#)

Value:

Description:
Maximum 100 characters

Now that you have created (or modified) your master list of Questions and configured the values for List Response Types, you can apply the Questions to an Author Questionnaire. To create a new Questionnaire, go to PolicyManager and click the new Create Author Questionnaires link in the 'Submission Policies section'; or, click the Create Author Questionnaire link on the *Create Custom Submission Questions* page.

If your publication was using Custom Submission Questions in version 6.0, your 'legacy' Questions are automatically assigned to a pre-configured 'Author Questionnaire' when you upgrade to version 6.1.

Create Author Questionnaire

Create a new Author Questionnaire by clicking the 'Add' button below. Author Questionnaires displayed here may be configured for use with each Article Type.

Author Questionnaire

[Remove](#)

[Edit](#)

Add

[Edit Article Types](#)

[Return to PolicyManager](#)

NOTE: If you Remove the pre-configured Author Questionnaire created at time of upgrade, you will disrupt the flow of your 'legacy' Custom Submission Questions in use prior to the upgrade. This Questionnaire should only be removed if you are not going to use Custom Submission Questions in the future, or a new Questionnaire is configured in its place.

If your publication was not using Custom Submission Questions in version 6.0, there is no pre-configured Author Questionnaire created when you upgrade to version 6.1. You must click the 'Add' button to create a new Questionnaire using the Questions you created.

Create Author Questionnaire

Create a new Author Questionnaire by clicking the 'Add' button below. Author Questionnaires displayed here may be configured for use with each Article Type.

No Author Questionnaires have been created.

Add

[Edit Article Types](#)

[Return to PolicyManager](#)

When you click the 'Add' button on the *Create Author Questionnaire* page, you are taken to the new *Configure Author Questionnaire* page where you must enter the 'Author Questionnaire Name' and then click the 'Add Custom Submission Questions' button to 'attach' Questions to this Questionnaire.

Configure Author Questionnaire

Enter a name for the Author Questionnaire in the 'Author Questionnaire Name' field. Custom Submission Questions may be added to the Author Questionnaire by clicking the 'Add Custom Submission Questions' button, selecting Custom Submission Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save this Author Questionnaire and return to the Create Author Questionnaire page.

Author Questionnaire Name:

Hide When you **Hide** an Author Questionnaire, the questionnaire will be deactivated (not available for use with any Article Types).

Question Display Order:

No Custom Submission Questions have been added.

Add Custom Submission Questions

Cancel Save

Select the Questions you want, and click the 'Add to Questionnaire' button. In the example below, note that the fourth Question has already been added to the Questionnaire, and therefore cannot be selected again.

If your publication was using Custom Submission Questions in version 6.0, your 'legacy' Questions are automatically listed here when you upgrade to version 6.1.

Select Custom Submission Questions for Author Questionnaire

Custom Submission Questions available for use in an Author Questionnaire are displayed below. Select the Custom Submission Questions you wish to add, and click the 'Add to Questionnaire' button to add them to the Author Questionnaire. Questions displayed in gray text have already been added to the Questionnaire and cannot be selected again.

Custom Submission Questions:

Select	Description
<input type="checkbox"/>	Does the submission meet correct word count limits?
<input type="checkbox"/>	Does the submission contain color images?
<input type="checkbox"/>	Has a copy of our User Agreement Form been included with the submission?
<input checked="" type="checkbox"/>	Has a copy of our Conflict of Interest Form been included with the submission?

Cancel

Add to Questionnaire

After clicking the 'Add to Questionnaire' button, you are returned to the *Configure Author Questionnaire* page, where you can adjust the order in which the Questions are displayed to the Author, and indicate whether an Author response is 'Required for Submission'. If this checkbox is selected, the Author will not be allowed to build his submission PDF without first answering the Question properly. Make sure to click the 'Save' button to save your changes.

If your publication was using Custom Submission Questions in version 6.0, your 'legacy' Questions are automatically listed here for the pre-configured 'Author Questionnaire'

when you upgrade to version 6.1.

Configure Author Questionnaire

Enter a name for the Author Questionnaire in the 'Author Questionnaire Name' field. Custom Submission Questions may be added to the Author Questionnaire by clicking the 'Add Custom Submission Questions' button, selecting Custom Submission Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save this Author Questionnaire and return to the Create Author Questionnaire page.

Author Questionnaire Name: (50 characters max)

Hide When you **Hide** an Author Questionnaire, the questionnaire will be deactivated (not available for use with any Article Types).

Question Display Order:

Order	Description	Required for Submission	Actions
<input type="text" value="1"/>	Does submission meet the correct word count limits?	<input checked="" type="checkbox"/>	Remove
<input type="text" value="2"/>	Does submission contain color images?	<input checked="" type="checkbox"/>	Remove
<input type="text" value="3"/>	Has a copy of our User Agreement Form been included with the submission?	<input checked="" type="checkbox"/>	Remove

NOTE: If you click the [Remove](#) link on this page, the Question will be removed from this particular Questionnaire only; you are not removing it from the master list of Questions. Questions can be safely removed from an Author Questionnaire, even if the Questionnaire has been used previously. This is because the Questionnaire only controls which questions are displayed, the order they are displayed in, and the 'Required for Submission' settings that are used for each question at the Additional Information submission step. The Questions themselves and their related responses remain saved in the database even if they are no longer selected as part of an Author Questionnaire.

Once you have created one or more Questionnaires, they are listed on the *Create Author Questionnaire* page. The illustration below shows a pre-configured Author Questionnaire created upon upgrade for use with existing legacy Custom Submission Questions, as well as Administrator-created Author Questionnaires.

Create Author Questionnaire

Create a new Author Questionnaire by clicking the 'Add' button below. Author Questionnaires displayed here may be configured for use with each Article Type.

Author Questionnaire	Remove	Edit
Author Questionnaire - New Submissions	Remove	Edit
Author Questionnaire - Revised Submissions	Remove	Edit
Author Questionnaire - Original Study	Remove	Edit

[Add](#)

[Edit Article Types](#)

[Return to PolicyManager](#)

Now that you have created (or modified) a master list of Questions and attached them to one or more Questionnaires, the final configuration step is to apply the Questionnaire(s) to one or more Article Types. Go to the *Edit Article Type* page in PolicyManager. Note that the *Set "Additional Information" Preferences* Article Type Parameter is renamed to *Set "Additional Information" Author Questionnaire Preferences*. The drop-down selector for this option displays a value of 'Hidden' as well as each of the Questionnaires created/ displayed on the *Create Author Questionnaire* page:

- If the 'Hidden' option is selected, the Additional Information step is not included as part of the Author submission process (i.e. the Additional Information step is suppressed).
- If a Questionnaire is selected from this drop-down list, the Additional Information step is included as part of the Author submission process, and the Questionnaire selected governs the Questions, Question order, and 'Required for Submission' settings that are used for the Article Type.

NOTE: Hidden Questions continue to display for submissions that used them before they were hidden. Hiding a Question only prevents it from being added to another Questionnaire in the future; if it is linked to a legacy submission directly, it continues to display.

Example 1: Page display for a publication using Custom Submission Questions in version 6.0. Illustration shows the pre-configured 'Author Questionnaire' configured for a site where an existing list of Questions was in place on the *Create Custom Submission Questions* page and the *Set 'Additional Information' Preferences* setting was configured to 'Display' on the *Edit Article Type* page for at least one Article Type prior to upgrade.

Article Type Parameters	New Submission		Revised Submission		Include on PDF Cover Page	
					Editor/Author	Reviewer
Set "Short Title" Preferences:	Optional	Optional	Optional	Optional	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Set "Select Section/Category" Preferences:	Optional	Optional	Optional	Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set "Submit Abstract" Preferences:	Required	Required	Required	Required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set "Enter Keywords" Preferences:	Optional	Optional	Optional	Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set "Select Classifications" Preferences:	Optional	Optional	Optional	Optional		
Set "Additional Information" Author Questionnaire Preferences:	Author Questionnaire		Author Questionnaire			
Set "Enter Comments" Preferences:	Optional	Optional	Optional	Optional		
Set "Suggest Reviewers" Preferences:	Display	Display	Display	Display	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set "Oppose Reviewers" Preferences:	Display	Display	Display	Display	<input type="checkbox"/>	<input type="checkbox"/>
Set "Respond to Reviewers" Preferences:	Hidden	Hidden	Hidden	Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Set "Request Editor" Preferences:	Hidden	Hidden	Hidden	Hidden		
Set "Select Region of Origin" Preferences:	Optional	Optional	Optional	Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Example 2: Page display for a publication not using Custom Submission Questions in version 6.0. A setting of 'Hidden' is the default value configured upon upgrade if the upgrading site does not have the *Set 'Additional Information' Preferences* setting configured to 'Display' for any New or Revised Submissions on the *Edit Article Type* page.

Article Type Parameters	New Submission		Revised Submission		Include on PDF Cover Page	
					Editor/Author	Reviewer
Set "Short Title" Preferences:	Optional	Optional	Optional	Optional	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Set "Select Section/Category" Preferences:	Optional	Optional	Optional	Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set "Submit Abstract" Preferences:	Required	Required	Required	Required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set "Enter Keywords" Preferences:	Optional	Optional	Optional	Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set "Select Classifications" Preferences:	Optional	Optional	Optional	Optional		
Set "Additional Information" Author Questionnaire Preferences:	Hidden		Hidden			
Set "Enter Comments" Preferences:	Hidden	Hidden	Optional	Optional		
Set "Suggest Reviewers" Preferences:	Display	Display	Display	Display	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set "Oppose Reviewers" Preferences:	Display	Display	Display	Display	<input type="checkbox"/>	<input type="checkbox"/>
Set "Respond to Reviewers" Preferences:	Hidden	Hidden	Hidden	Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Set "Request Editor" Preferences:	Hidden	Hidden	Hidden	Hidden		
Set "Select Region of Origin" Preferences:	Optional	Optional	Optional	Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Imposing Specific Order of Source Files

In EM version 6.0, Authors upload Submission Items (“Items” or “source files”) on the *Attach Files* page. This page is accessed during the new submission process, when an existing submission is edited, and when submitting a revision. The ‘Item’ drop-down list displays the required Submission Items in alphabetical order, followed by the optional Submission Items in alphabetical order. The designation of required and optional Items varies by Article Type, so the order of the list depends on the Article Type selected at an earlier step in the manuscript submission process.

The Author is allowed to upload his source files in any random order. Once the files are uploaded, he can then re-order the source files in any way he chooses. This may not necessarily be the publication’s preferred Item order, requiring the editorial office staff to edit the submission, re-order the Items in the publication’s preferred order, and rebuild the submission PDF.

In EM version 6.1, publications can customize the order in which Items are displayed in the drop-down lists on the *Attach Files* page as well as the order in which Items are built into the PDF.

If the publication has imposed a specific source file order, the Submission Items are moved into the imposed order 1) when the user clicks the ‘Update File Order’ button, and 2) when the user clicks the ‘Next’ button to continue with the manuscript submission process. This means that the Author would be allowed to re-order files of the same Submission Item type, but not change the overall Item order. For example, the publication could ‘impose’ that Author Agreement is the first Item, followed by the Blinded Manuscript and then the list of Figures. The Author would be permitted to re-order the Figures, but cannot change the overall order so that the Figures come before the Author Agreement and Blinded Manuscript.

If the publication has chosen to impose the Item order, a new manuscript submission page is displayed when the user clicks the ‘Next’ button from the *Attach Files* page. This page is entitled *Attach Files Order* and informs the user that the files have been re-ordered per the publication’s requirements. It also displays the Submission Items in the imposed order. The instructions on this page are customizable in PolicyManager.

The example below shows the Items listed in alphabetical order in the ‘Item’ drop-down list, and customized instructions for the Item Ordering section. Note the Author uploaded the Author Agreement last, even though this is the first Item in the Item order drop-down list.

New Submission

[Frequently Asked Questions](#)

- [Select Article Type](#)
- [Enter Title](#)
- [Add/Edit/Remove Authors](#)
- [Select Section/Category](#)
- [Submit Abstract](#)
- [Enter Keywords](#)
- [Select Classifications](#)
- [Additional Information](#)
- [Enter Comments](#)
- [Request Editor](#)
- [Select Region of Origin](#)
- [Attach Files](#)

[Insert Special Character](#)

Please Attach Files

Required **Items** are marked with a *. When all **Items** have been attached, click **Next** at the bottom of the page.

Item	Description	Delivery Method	File Name
*Author Agreement	Author Agreement	<input checked="" type="radio"/> Online Web System <input type="radio"/> Offline	
*	Compressed File (.zip, .tar.gz)		
*	Cover Letter		
*	Figure		
*	*Manuscript		
*	Related Articles Table		

File Name:

This is where the publication would customize the instructions applicable to their Item Ordering policy...

Order	Item	Description	File Name	Size	Last Modified	Actions
1	Figure	Figure	cropped duncan.bmp	94.8 KB	Jun 17 2003 11:00AM	Edit Data Download Remove
2	Figure	Figure	duncan_halloween.jpg	31.7 KB	Feb 23 2004 12:42PM	Edit Data Download Remove
3	Figure	Figure	Ellie 2.bmp	576.1 KB	Jun 7 2006 11:58AM	Edit Data Download Remove
4	*Manuscript	Manuscript	EM Spec 2.1-08_v10.doc	1.4 MB	Feb 23 2004 12:39PM	Download Remove
5	Author Agreement	Author Agreement	Offline			Remove

When Author clicks the 'Next' button to proceed with the submission, he is taken to the new *Attach Files Order* page. The Items are now listed in the publication's imposed order (Author Agreement has been moved to the first Item in the list) and customizable instructions are displayed. Note that the Author is permitted to re-order files with the same Item type (e.g. all Figures).

Submission

[Frequently Asked Questions](#)

- [Select Article Type](#)
- [Enter Title](#)
- [Add/Edit/Remove Authors](#)
- [Select Section/Category](#)
- [Submit Abstract](#)
- [Enter Keywords](#)
- [Select Classifications](#)
- [Additional Information](#)
- [Enter Comments](#)
- [Request Editor](#)
- [Select Region of Origin](#)
- [Attach Files](#)

Attach Files Order

The order in which the attached items appear is the order established by this publication. You may re-order any items of the same type by entering new numbers into any editable 'Order' boxes. Note: if no 'Order' boxes appear, the Items cannot be re-ordered. Click the 'Next' button to continue with the submission process.

Order	Description	File Name	Size
1	Author Agreement		0 Bytes
2	Figure	cropped duncan.bmp	94 KB
3	Figure	duncan_halloween.jpg	31 KB
4	Figure	Ellie 2.bmp	576 KB
5	Manuscript	EM Spec 2.1-08_v10.doc	1 MB

NOTE: Existing submissions do not have their files re-ordered when the publication upgrades to EM version 6.1, unless these submissions are subsequently edited after the upgrade.

TO CONFIGURE:

When your publication upgrades to version 6.1, the Master Submission Item list is automatically put in alphabetical order. To change the order, go to PolicyManager and click the [Edit Submission Items](#) link. You will be taken to an enhanced *Edit Master Submission Item Types* page, where you can change the order by entering numbers into the ‘Order’ boxes and clicking the ‘Update Item Order’ button.

- Select the ‘Impose this order on uploaded files’ checkbox and then click the ‘Save Changes’ button to impose the order on all Article Types.
- Select the ‘Show required Items for each Article Type first in the drop-down list’ checkbox to list the required Items first in the drop-down lists on the *Attach Files* page.
- If you select both options, the required Items will be listed first, but the Items will be re-ordered per the ‘Order’ boxes before the PDF is built.

Edit Master Submission Item Types

Listed below are the Item Types that may be uploaded as components of a submission. The order of items the user will see in the Item Type drop-down list on the "Attach Files" page can be changed by entering the desired numeric order in the boxes below and clicking the "Update Item Order button".

To force the items into this order during the manuscript submission process, select the checkbox "Impose this order on uploaded files". The Author will have the opportunity to re-order items of the same Item Type.

Impose this order on uploaded files.
Click the 'Save Changes' button to save this setting

Required Items will be shown first in the drop-down list if the checkbox "Show required Submission Items for each Article Type first in the drop-down list" is checked. If imposed ordering is enabled, then the required items will be displayed first in the drop-down list on the Attach Files page, but the files will be ordered according to the order defined below.

Show required Items for each Article Type first in the drop-down list.
Click the "Save Changes" button to save this setting

Order	Item Type	Item Family	Artwork QC	Reference Checking	Actions
<input type="text" value="1"/>	Acknowledgement	Default			Remove Edit
<input type="text" value="2"/>	Appendices	Default			Remove Edit
<input type="text" value="3"/>	AQC Image	Default	✓		Remove Edit
<input type="text" value="4"/>	Blinded Manuscript	Default		✓	Remove Edit

[Insert Special Character](#)

New Item Type:
Maximum 256 characters.

New Item Type Family:

Next, go to the existing PolicyManager page *Edit Manuscript Submission Instructions*. Default instructions for the new manuscript submission pages are visible next to the new ‘Attach Files Order’ section of the page. These instructions can be customized and saved.

Extended Classification Hierarchy

In EM version 6.0, publications can use up to two levels of classifications, defined by their numbering, such as '10: Main heading', '10.010: Classification entry', etc.

New in version 6.1, this is extended to allow an unlimited number of Classification levels, with the only restriction being that Classification numbers are less than 256 characters in length. For example:

- 10: Main Heading
- 10.010: Sub-Heading
- 10.010.001: Classification entry

Pages used to select Classifications now have several new features:

1. A tree-style Classification list display [+] and [-] icons expand and collapse portions of the Classification list.
2. Expand All / Collapse All links expand or collapse the entire list.
 - Note: For performance reasons, these links are displayed for publications with 1,000 Classifications or less.
3. An intuitive method of selecting and removing Classifications from the user's personal list.
 - To add Classifications to your personal list, click the checkbox(es) of the Classifications you want in the main list and click the 'Select->' buttons to move your selections to the 'Selected Classifications' list.
 - To remove Classifications from your personal list, click the checkbox(es) of the Classifications you want to remove in the Selected Classifications window and click the '<-Remove' button.
 - When you are finished, click the 'Submit' button to save your changes.

Select Personal Classifications

Please identify your areas of interest and specialization by selecting one or more classifications from the list below.

To save changes you must click "Submit" before you leave this window.

Search: Search Clear

[Matching terms display in dark text]

Expand All Collapse All

1: PHARMACOLOGY

- .02000: Drug interactions plus
- .02500: Additional Classification
- .03000: Another
- .04000: drug toxicity
- .06000: antibiotics
- .08000: Antivirals
- .11000: Steroids
- .12000: NSAIDS (non-steroidal)

2: OPTICS

3: ANESTHESIA

4: CATARACT

5: CONJUNCTIVA

6: ORBIT

7: TRAUMA

8: ANATOMY

9: BACTERIOLOGY

10: AIDS

11: BIOCHEMISTRY (eye)

12: BIOSTATISTICS (vision)

Expand All Collapse All

Selected Classifications:

- 1: PHARMACOLOGY
- 1.02000: Drug interactions plus
- 1.04000: drug toxicity
- 1.08000: Antivirals

Select-> <-Remove

Cancel Submit

Publications also now have more control over the way Classifications display and are selected by users. On the *Set Classification Display and Selection Policies* page in PolicyManager, you can configure several display options including:

- Highlight the top-level of Classifications to use as headings.
- Turn off Classification numbering when Classifications are displayed.
- Sort lists of Classifications alphabetically by the Classification text description (if Classification numbers are not shown). This display option is recommended only for simpler 1- or 2-level Classification hierarchies.
- Prevent users from selecting some Classifications: Either the top-level of Classifications, or all levels except the very bottom level of Classifications.
- Automatically select parent Classifications whenever a Classification is selected by the user.
- Hide Classification terms when they are no longer required.

Select Personal Classifications

Please identify your areas of interest and specialization by selecting one or more classifications from the list below.

To save changes you must click "Submit" before you leave this window.

Search:

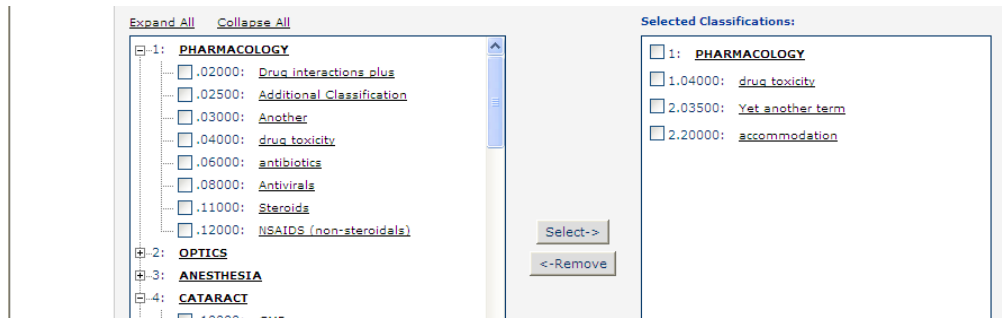
[Matching terms display in dark text]

- AIDS
- ALLERGY
- ALLIED HEALTH
- ANATOMY
- ANESTHESIA
 - general
 - local
- ANIMAL MODELS
- BACTERIOLOGY
- BASIC SCIENCE
- BIOCHEMISTRY (eye)
- BIOSTATISTICS (vision)
- CATARACT
- CONJUNCTIVA
- CONTACT LENSES
- CORNEA
- DIABETES
- DIAGNOSTIC TESTING
- DRUG ABUSE
- DRY EYE

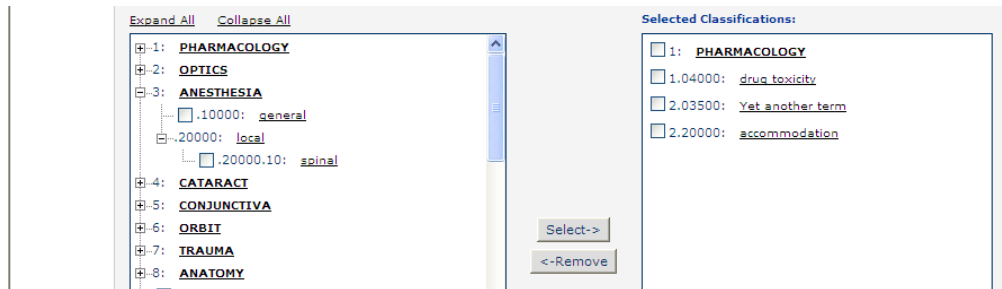
Selected Classifications:

- accommodation
- drug toxicity
- PHARMACOLOGY
- Yet another term

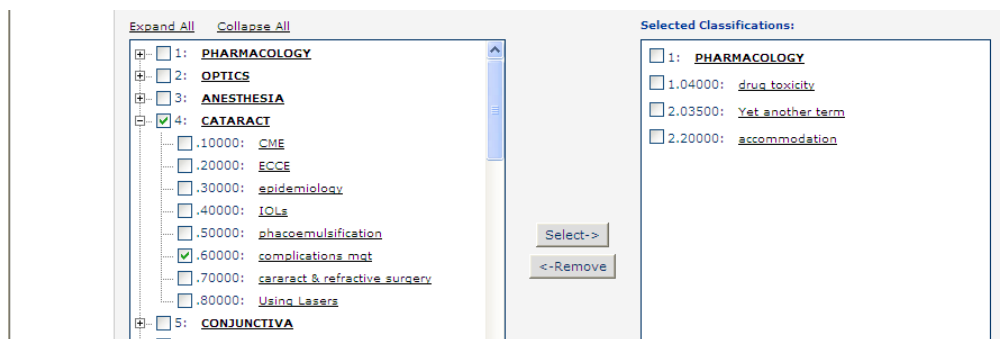
Top-level Classifications can be treated as headings, and therefore cannot be selected.



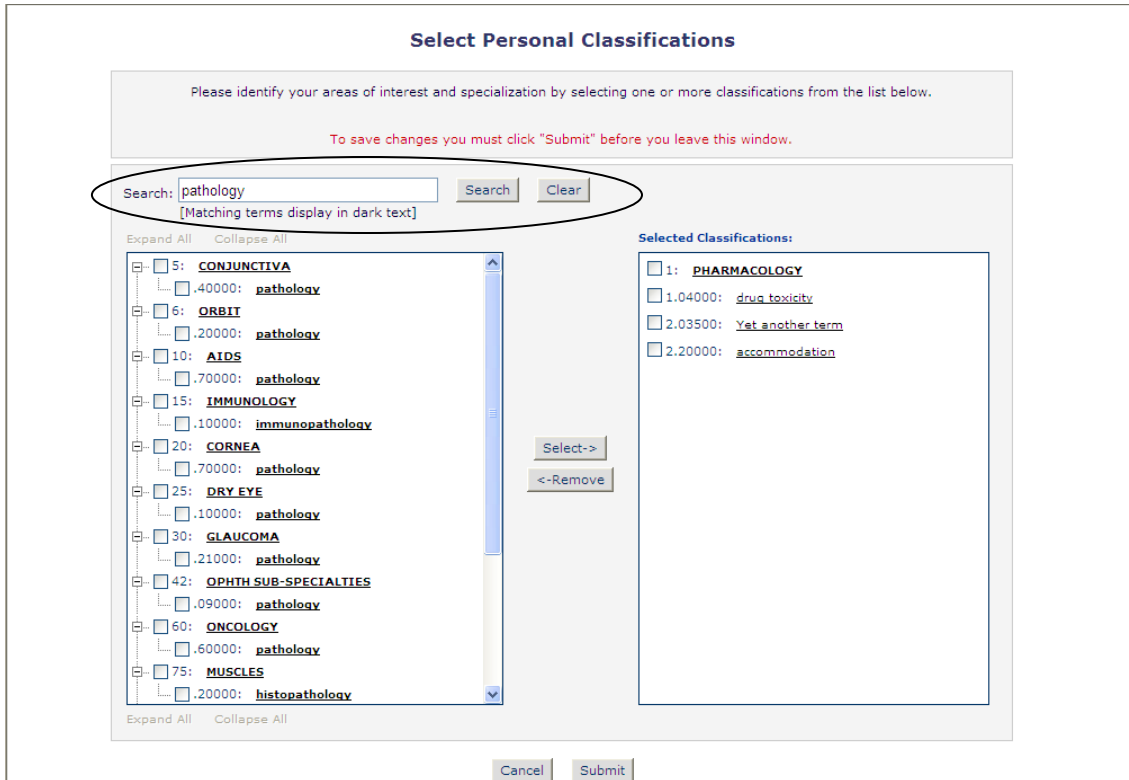
Selection can also be limited to the lowest level of Classification only.



You can configure the system to automatically select all parent Classifications of a Classification term selected by the user. This can be combined with either of the options limiting the classifications which are selected by the user.



Users can now search for Classification terms when selecting Classifications, supporting publications using large Classification lists. To execute a search, simply type the desired text into the Search field and click the 'Search' button to look for Classifications whose descriptions contain the search text. Matching records and their parents will be shown in the results. Clicking the 'Clear' button will re-set the search and return to the full Classification list.



If you click a Classification description, the *View Full Classification Details* pop-up is launched. This page shows the full hierarchy leading to the selected Classification.

View Full Classification Details



TO CONFIGURE:

When the publication upgrades to version 6.1, the existing Classification schema is retained and is automatically supported in the new structure. To modify or expand the Classifications schema, click the [Edit Classifications](#) link in the 'Submission Policies' section of PolicyManager. You will see an enhanced *Edit Classifications* page with the new 'tree' structure, and a Search tool to quickly locate terms that you may want to change.

Edit Classifications

The Editorial Manager Classification schema contains a hierarchical numbering structure. Each level is separated by a decimal point/period character. To add or change a classification, enter the full classification number, for example 10.100.020.001 for a fourth-level classification. Click a Classification's description to view the full list of classifications above it in the hierarchy. Note that 'Expand All' and 'Collapse All' navigation links are initially provided for smaller classification lists, but if your list exceeds 1000 terms these will not display.

[View Selection and Display Policies](#)

Add Classification

Search

[Matching terms display in dark text]

Active Classifications

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

- [Remove](#) [Edit](#) [1:PHARMACOLOGY](#)
- [Remove](#) [Edit](#) [2:OPTICS](#)
- [Remove](#) [Edit](#) [3:ANESTHESIA](#)
- [Remove](#) [Edit](#) [4:CATARACT](#)
- [Remove](#) [Edit](#) [5:CONJUNCTIVA](#)
- [Remove](#) [Edit](#) [6:ORBIT](#)
- [Remove](#) [Edit](#) [7:TRAUMA](#)
- [Remove](#) [Edit](#) [8:ANATOMY](#)
- [Remove](#) [Edit](#) [9:BACTERIOLOGY](#)
- [Remove](#) [Edit](#) [10:AIDS](#)
- [Remove](#) [Edit](#) [11:BIOCHEMISTRY \(eye\)](#)
- [Remove](#) [Edit](#) [12:BIOSTATISTICS \(vision\)](#)
- [Remove](#) [Edit](#) [13:EPIDEMIOLOGY](#)
- [Remove](#) [Edit](#) [14:HISTOCHEMISTRY](#)
- [Remove](#) [Edit](#) [15:IMMUNOLOGY](#)
- [Remove](#) [Edit](#) [16:MICROBIOLOGY](#)
- [Remove](#) [Edit](#) [17:MORPHOLOGY](#)
- [Remove](#) [Edit](#) [19:PSYCHOPHYSICS](#)
- [Remove](#) [Edit](#) [20:CORNEA](#)
- [Remove](#) [Edit](#) [21:ULTRASTRUCTURAL STUDIES](#)

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

Hidden Classifications

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

- [12:\(This Classification is missing or not hidden\)](#)
- [Remove](#) [Edit](#) [18:PARASITOLOGY](#)

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

Add Classification

[Policy Manager Main Menu](#)

Click the 'Add Classification' button to add a new Classification Number and Description.

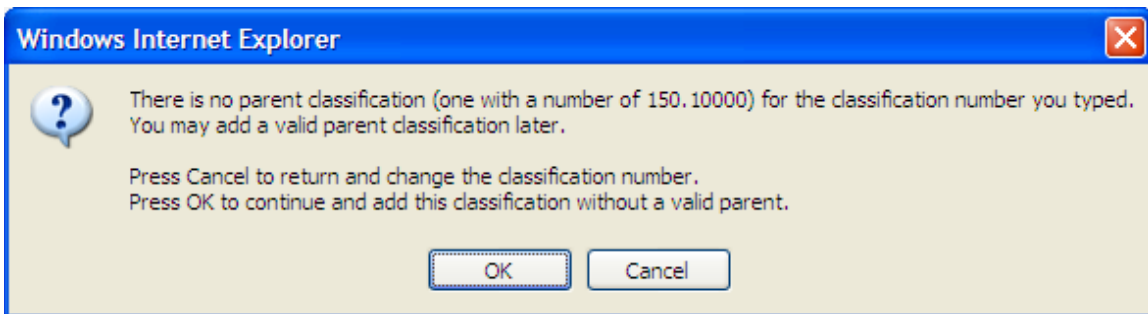
Add Classification

Classification Number:

Classification Description:

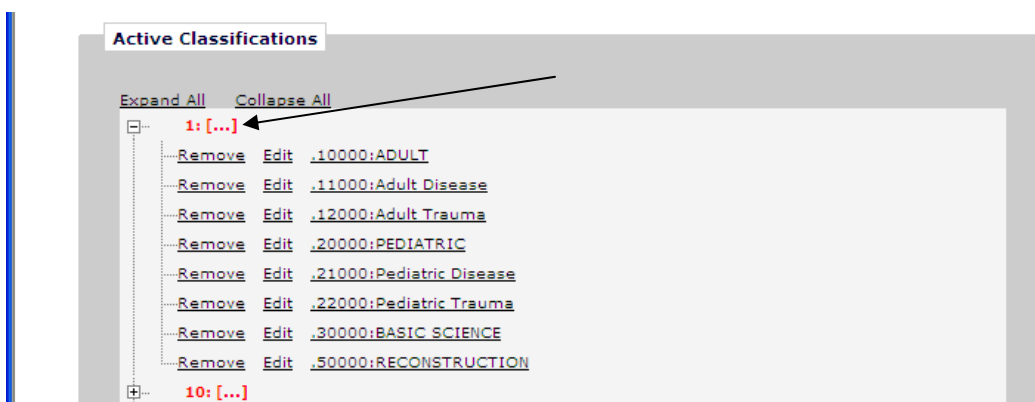
NOTE: When entering a new Classification, the Classification Number field must contain only numbers and decimal points (e.g. 10, 10.1, 10.001,010); alpha-numeric characters (e.g. A1, A.10, 03.30.+p) are not allowed.

When you add a new Classification, the system organizes the list by decoding the Classification number to identify its 'parent' Classification in the list. You are allowed to enter a Classification where a parent does not yet exist, but you will be asked to confirm the desired behavior.

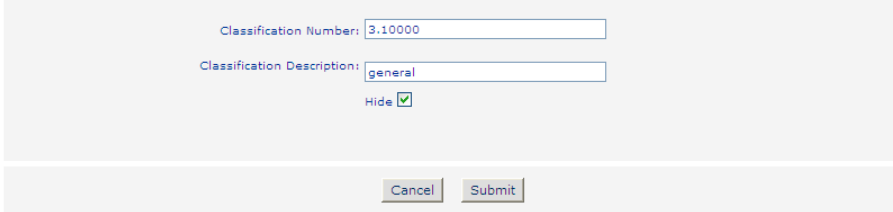


If you choose to proceed without a parent Classification, there will be gaps in the structure and you will see a bold red entry [...].

NOTE: Authors and Reviewers selecting Classifications would see the [...] in gray font, which they may find confusing.



Classifications may now be Hidden if no longer required. Click the Edit link on the *Edit Classifications* page to Hide a Classification term. Hidden Classifications are listed in a separate section below the active Classifications on the main *Edit Classifications* page, as shown above.



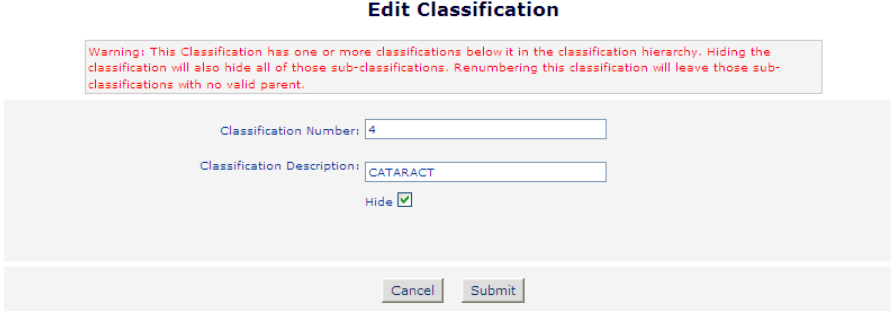
Edit Classification

Classification Number:

Classification Description:

Hide

When you Hide a Classification which has Sub-Classifications beneath it, all of those Sub-Classifications are also automatically Hidden. If you Edit a Classification Number for a Classification with Sub-Classifications beneath it, the system will **not** re-number the Sub-Classifications automatically. This would leave a gap in the numbering system and you will need to either add a new, replacement Classification with the old number, or renumber all Sub-Classifications manually.



Edit Classification

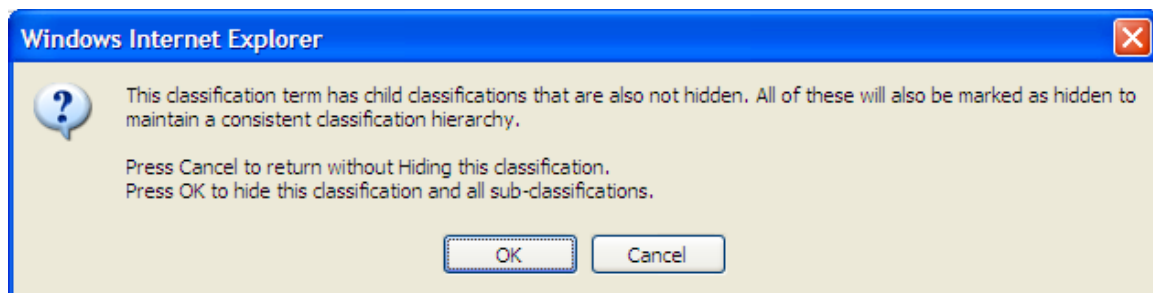
Warning: This Classification has one or more classifications below it in the classification hierarchy. Hiding the classification will also hide all of those sub-classifications. Renumbering this classification will leave those sub-classifications with no valid parent.

Classification Number:

Classification Description:

Hide

If you choose to proceed with Hiding the parent Classification, you will be asked to confirm the desired behavior.



To configure the way Classifications appear to Authors and Reviewers, and the automatic

selection of parent Classifications, click the [Set Classifications Display Policy](#) link in PolicyManager. This page has been enhanced with several new options.

Set Classification Display and Selection Policies

The Editorial Manager Classification Schema contains a hierarchical numbering structure; these options control the display and selection of classifications.

Make the top-level of classifications non-selectable to force authors and reviewers to use more detailed classification terms. Automatically selecting parent classifications will mean a broader range of classifications is automatically applied to submission and reviewers.

Selection: Users may not select top-level classifications.
 Users may only select from the lowest level of classification
 Automatically select all parent classifications.

These options control the way classifications are listed. Hiding classification numbers is only recommended for shorter lists. The Sort Alphabetically option automatically hides classification numbers. It is easier to navigate longer lists of classifications if you highlight the top level.

Display: Highlight top-level classifications.
 Sort Alphabetically(automatically hides classification numbers).
 Hide Classification Numbers.

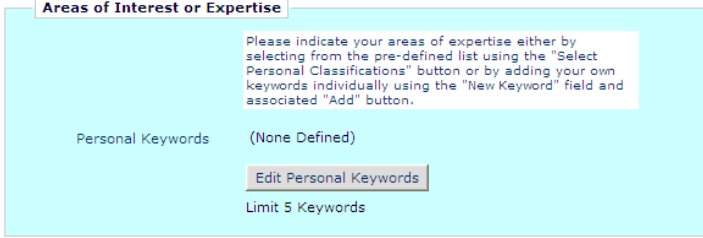
- Select ‘Users may not select top-level classifications’ if your first level of Classifications is intended to act as headings only, with the main Classifications at a lower level. This may be combined with the ‘Highlight top-level classifications’ setting.
- Select ‘Users may only select from the lowest level of classification’ if you wish users to select only the most narrowly-defined subject terms. This may be combined with the ‘Automatically select all parent classifications’ to also pick up all broader terms leading to the user’s chosen areas of expertise, allowing for wider-ranging Reviewer searches.
- Select ‘Automatically select all parent classifications’ to ensure that users select as wide a range of Classifications as possible; this setting will result in more Reviewers matching ‘Suggest Reviewers’ searches.
 - This option will also de-select Classifications in order to maintain an unbroken chain of Classifications for all selection. This is particularly noticeable if you also limit the ability of users to select Classifications (either excluding selection from the top-level classifications or allowing selection from only the lowest level).
- Select the ‘Highlight top-level classifications’ to have these appear as headings; clear this option if you only have a single level of Classifications in a simple list.
- Select the ‘Sort Alphabetically’ option to have Classifications at each level sort alphabetically by description, ignoring Classification numbers.
 - NOTE: Selecting this option automatically hides Classification numbering and is recommended for publications with only one or two levels of Classification terms.
- Select the ‘Hide Numbering’ option to suppress Classification numbering. Numbering is still required when configuring Classification lists to link classifications to parents, but will not be shown to users.

Personal Keywords

In EM version 6.0, publications can collect Personal Keywords when an Author submits a manuscript. However, when a new person registers on the system, there is no opportunity to enter Personal Keywords (i.e. users cannot indicate areas of expertise).

In version 6.1, you can allow new users to enter free-form Keywords when registering for EM. You can specify whether entering Personal Keywords is optional or required, and also set upper and lower limits for the number of Keywords they are allowed to enter.

When Keywords (and/or Classifications) are enabled for registration in PolicyManager, users who register will see a new 'Areas of Interest or Expertise' section on the *Registration* page. In the example below, the publication has specified that new users may enter (optional) up to 5 Personal Keywords.



Areas of Interest or Expertise

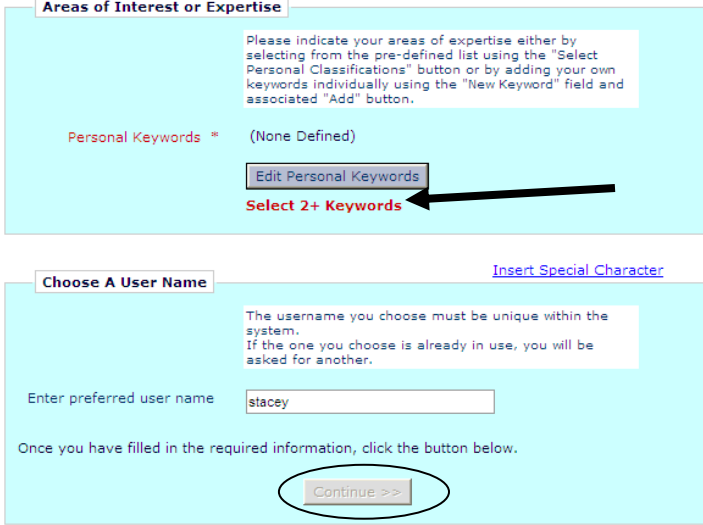
Please indicate your areas of expertise either by selecting from the pre-defined list using the "Select Personal Classifications" button or by adding your own keywords individually using the "New Keyword" field and associated "Add" button.

Personal Keywords (None Defined)

[Edit Personal Keywords](#)

Limit 5 Keywords

This example shows a publication that has required new users to enter at least 2 Personal Keywords when registering for EM. The user is not allowed to proceed with the registration (i.e. the 'Continue' button is disabled) until he has entered the minimum number of required Keywords.



Areas of Interest or Expertise

Please indicate your areas of expertise either by selecting from the pre-defined list using the "Select Personal Classifications" button or by adding your own keywords individually using the "New Keyword" field and associated "Add" button.

Personal Keywords * (None Defined)

[Edit Personal Keywords](#)

Select 2+ Keywords

[Insert Special Character](#)

Choose A User Name

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

Enter preferred user name

Once you have filled in the required information, click the button below.

[Continue >>](#)

Clicking the 'Edit Personal Keywords' button on the *Registration* page allows the user to manage his Keywords by adding, editing or removing entries in the list.

Edit Personal Keywords

Current Keywords

Limit 4 Keywords

cataract surgery [Remove](#) [Edit](#)

special eye surgery [Remove](#) [Edit](#)

New Keyword:

Once Keywords have been entered for a person, they are displayed on the main *People Information* page. Users can also modify their own Personal Keywords on the *Update My Information* page.

Areas of Interest or Expertise

Please indicate your areas of expertise either by selecting from the pre-defined list using the "Select Personal Classifications" button or by adding your own keywords individually using the "New Keyword" field and associated "Add" button.

Personal Classifications (None Selected)

Personal Keywords *

Select 2+ Keywords

Even if Personal Keywords are 'hidden' in PolicyManager (i.e. users cannot enter Keywords when registering or edit Keywords on the *Update My Information* page), Editors still have access to Personal Keywords on the *Search People – Update Information* page. This allows the publication to maintain an area of expertise for their users (especially Reviewers) that cannot be changed by those users.

Editors can then use Personal Keywords as selection criteria when searching for Reviewers.

Search For Reviewers - Manuscript Number JBJS-D-03-00660R1
"Primary Souter-Strathclyde Total Elbow Prosthesis in Rheumatoid Arthritis. A long-term follow-up study.*NEW TITLE AS OF 7/9/03***"**

[View Reviews and Comments](#)
[Manuscript Details](#)
[Register and Invite New Reviewer](#)

Change Search Type

Search My Publication
 Search for Reviewers from Reviewer

Search for Reviewers

[Help with Searching](#)
[Insert Special Character](#)

Criterion	Selector	Value	
<input type="text" value="Personal Keywords"/>	<input type="text" value="Contains"/>	<input type="text" value="eye "/>	<input type="text" value="END"/>
<input type="text" value="Last Name"/>	<input type="text" value="Begins With"/>	<input type="text" value=""/>	<input type="text" value="END"/>
<input type="text" value="Last Name"/>	<input type="text" value="Begins With"/>	<input type="text" value=""/>	<input type="text" value="END"/>
<input type="text" value="Last Name"/>	<input type="text" value="Begins With"/>	<input type="text" value=""/>	<input type="text" value="END"/>
<input type="text" value="Last Name"/>	<input type="text" value="Begins With"/>	<input type="text" value=""/>	<input type="text" value="END"/>
<input type="text" value="Last Name"/>	<input type="text" value="Begins With"/>	<input type="text" value=""/>	<input type="text" value="END"/>

[Register and Invite New Reviewer](#)

TO CONFIGURE:

Click the [Edit Registration Fields](#) link in the 'Registration and Login Policies' section of PolicyManager. This takes you to the existing *Edit Registration Fields* page, which has been enhanced with new settings for both Keywords and Classifications.

- Select 'Hidden' to stop users from entering Personal Keywords when registering (Editors will still be able to add or edit these on the *Search People – Update Information* page).
- Select 'Optional' to allow users to enter Personal Keywords when registering or on the *Update My Information* page. You may also set a 'Maximum' limit with this option.
- Select 'Required' to force a user to enter at least one Personal Keyword when registering. A 'Minimum' value is required for this option, and defaults to '1' if selected.
- The 'Maximum' value sets an upper limit for the number of Keywords that can be selected; and can be used with any of the other options.

City
 State
 Zip or Postal Code
 Country
 Address is for (Work, Home, Other)
 Are you available as a Reviewer?
 Username

Access to Personal Classifications (defined by an administrator) and Keywords (typed by the user) can be hidden from users when they register or update their information. You can set a maximum number of classifications that users may select or keywords they may add when they register or update their information; making an item required enforces a minimum of at least one.

Classifications and Keywords

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

Under PolicyManager, the *Edit Registration Instructions* page has been extended to include new instructional text for the ‘Areas of Interest and Expertise’ section. This text appears on the *Registration*, *Update My Information* and *Search People – Update Information* pages. The default text is shown below; however, you should modify this text to reflect your publication’s policy.

<p>Areas of Interest and Expertise Instructions (On Registration and Update My Information)</p> <p>View Default Instructions</p>	<p>Please indicate your areas of expertise either by selecting from the pre-defined list using the "Select Personal Classifications" button or by adding your own keywords individually using the "New Keyword" field and associated "Add" button.</p> <p>Revert to Default Instructions</p>
<p>Select Personal Classifications popup window</p> <p>View Default Instructions</p>	<p>Please identify your areas of Interest and specialization by selecting one or more classifications from the list below.</p> <p>Revert to Default Instructions</p>

Publications which allow proxy registration can also make Personal Keywords mandatory when a user logs in after being proxy registered (known as Expedited Reviewer Login). The existing *Configure Expedited Reviewer Login* page on PolicyManager has been extended to accommodate this.

If you make Classifications or Keywords required on login following proxy registration, you need to define a minimum number to be entered. You may also define an optional upper limit to be applied at the same time.

Classifications and Keywords

	Required (Minimum)	Maximum (leave blank for no limit)
Select Personal Classifications	<input type="checkbox"/> <input type="text"/>	<input type="text"/>
Enter Personal Keywords	<input type="checkbox"/> <input type="text"/>	<input type="text"/>

Two new mail merge fields are introduced related to Keywords.

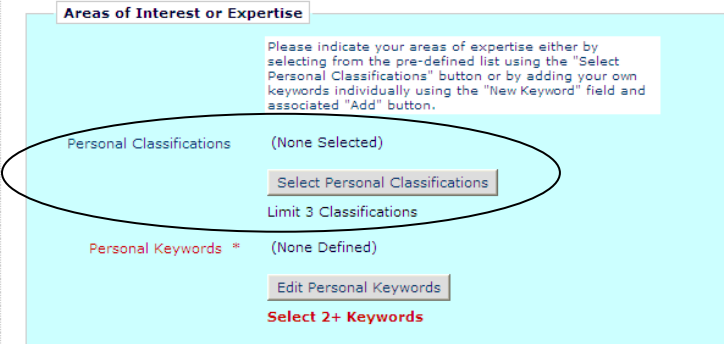
1. **%PERSON_KEYWORDS%** - This merge field is available for publications to use in all letters. When used, it inserts each of the personal keyword currently associated with the intended recipient's record.
2. **%UPDATE_CLASSIFICATIONS_KEYWORDS_DEEP_LINK%** - This merge field is available for publications to use in all letters. When this merge field is included in a letter, it is replaced with a deep link for the recipient of the letter (the link is not visible in CC'd letters or in history). Clicking the deep link brings the user directly to a page where they may update their Personal Keywords.

Personal Classifications Enhancements

In EM version 6.0, Authors can select Personal Classifications (i.e. areas of expertise) from a pre-defined list when they register on the system. However, if the publication does not use a formal Classification system, there is no way to turn off (hide) Personal Classifications when a new person registers.

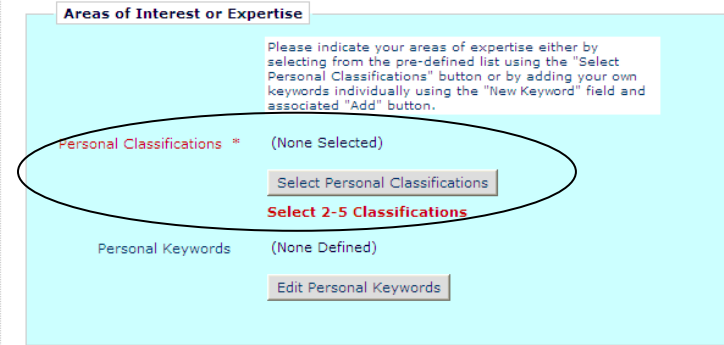
In version 6.1, you can turn off Personal Classifications on the *Registration* page. You may also set upper and lower limits for the number of Personal Classifications users are allowed to select.

When Classifications (and/or Keywords) are enabled for registration in PolicyManager, users who register will see a new 'Areas of Interest or Expertise' section on the *Registration* page. In the example below, the publication has specified that new users may select (optional) no more than 3 Personal Classifications.



The screenshot shows a registration form titled "Areas of Interest or Expertise". It contains a text box with instructions: "Please indicate your areas of expertise either by selecting from the pre-defined list using the 'Select Personal Classifications' button or by adding your own keywords individually using the 'New Keyword' field and associated 'Add' button." Below this, there are two main sections. The first is "Personal Classifications" with the text "(None Selected)" and a button labeled "Select Personal Classifications". Below this button, it says "Limit 3 Classifications". The second section is "Personal Keywords *" with the text "(None Defined)" and a button labeled "Edit Personal Keywords". At the bottom of the form, there is a red link that says "Select 2+ Keywords". A black oval highlights the "Personal Classifications" section and its associated button.

This example shows a publication that has required new users to select at least 2 – but no more than 5 - Personal Classifications when registering for EM.



The screenshot shows a registration form titled "Areas of Interest or Expertise". It contains a text box with instructions: "Please indicate your areas of expertise either by selecting from the pre-defined list using the 'Select Personal Classifications' button or by adding your own keywords individually using the 'New Keyword' field and associated 'Add' button." Below this, there are two main sections. The first is "Personal Classifications *" with the text "(None Selected)" and a button labeled "Select Personal Classifications". Below this button, it says "Select 2-5 Classifications". The second section is "Personal Keywords" with the text "(None Defined)" and a button labeled "Edit Personal Keywords". A black oval highlights the "Personal Classifications" section and its associated button.

If the new user attempts to submit the registration without selecting the required number of Classifications (as specified in PolicyManager), he is notified to return to the *Registration* page and select/enter the missing information.

Error Notice

You did not select the required number of Classifications.

Please use the button below to go back to the Previous Page and enter the missing information.

<< Previous Page

Clicking the 'Select Personal Classifications' button on the *Registration* page takes the user to the enhanced *Select Personal Classifications* page described in the *Extended Classification Hierarchy* section of this document.

Select Personal Classifications

Please identify your areas of interest and specialization by selecting one or more classifications from the list below.

To save changes you must click "Submit" before you leave this window.

Search:

[Matching terms display in red text]

<input type="checkbox"/>	1: PHARMACOLOGY
<input type="checkbox"/>	2: OPTICS
<input type="checkbox"/>	3: ANESTHESIA
<input type="checkbox"/>	4: CATARACT
<input type="checkbox"/>	5: CONJUNCTIVA
<input type="checkbox"/>	6: ORBIT
<input type="checkbox"/>	7: TRAUMA
<input type="checkbox"/>	8: ANATOMY
<input type="checkbox"/>	9: BACTERIOLOGY
<input type="checkbox"/>	10: AIDS
<input type="checkbox"/>	11: BIOCHEMISTRY (eye)
<input type="checkbox"/>	12: BIOSTATISTICS (vision)
<input type="checkbox"/>	13: EPIDEMIOLOGY
<input type="checkbox"/>	14: HISTOCHEMISTRY
<input type="checkbox"/>	15: IMMUNOLOGY
<input type="checkbox"/>	16: MICROBIOLOGY
<input type="checkbox"/>	17: MORPHOLOGY

Selected Classifications:

<input type="checkbox"/>	6: ORBIT
<input type="checkbox"/>	6.40000: trauma
<input type="checkbox"/>	6.05000: imaging
<input type="checkbox"/>	6.01000: anatomy

Once Classifications have been selected for a person, they are displayed on the main *People Information* page. Users can also modify their own Personal Classifications on the *Update My Information* page.

Areas of Interest or Expertise

Please indicate your areas of expertise either by selecting from the pre-defined list using the "Select Personal Classifications" button or by adding your own keywords individually using the "New Keyword" field and associated "Add" button.

<p style="color: red; font-weight: bold;">Personal Classifications *</p>	<p>1.11000: Adult Disease</p> <p>1.22000: Pediatric Trauma</p> <p>30.33000: Chest & Ribs</p>
<input type="button" value="Select Personal Classifications"/>	
<p style="font-size: small;">Select 2-5 Classifications</p>	
<p>Personal Keywords</p>	<p>(None Defined)</p>
<input type="button" value="Edit Personal Keywords"/>	

Per current functionality, even if a user cannot see Classifications when registering, Editors have access to both on the *Search People – Update Information* page. Editors may use either Keywords or Classifications to designate a Reviewer’s areas of expertise in the system.

Even if Personal Classifications are ‘hidden’ in PolicyManager (i.e. users cannot select Classifications when registering or edit Classifications on the *Update My Information* page), Editors still have access to Classifications on the *Search People – Update Information* page. Editors may use Classifications to designate a Reviewer’s areas of expertise in the system.

Per current functionality, Editors can then use Personal Classifications as selection criteria (newly enhanced in version 6.1) when searching for Reviewers.

TO CONFIGURE:

Click the [Edit Registration Fields](#) link in the ‘Registration and Login Policies’ section of PolicyManager. This takes you to the existing *Edit Registration Fields* page, which has been enhanced with new settings for both Keywords and Classifications.

- Select ‘Hidden’ to stop users from selecting Classifications when registering (Editors will still be able to add or edit these).
- Select ‘Optional’ to allow users to select Classifications. You may also set a ‘Maximum’ limit with this option.
- Select ‘Required’ to force a user to select at least one Classification. A ‘Minimum’ value is required for this option, and defaults to ‘1’ if selected.
- The ‘Maximum’ value sets an upper limit for the number of Classifications that can be selected; and can be used with any of the other options.

City
 State
 Zip or Postal Code
 Country
 Address is for (Work, Home, Other)
 Are you available as a Reviewer?
 Username

Access to Personal Classifications (defined by an administrator) and Keywords (typed by the user) can be hidden from users when they register or update their information. You can set a maximum number of classifications that users may select or keywords they may add when they register or update their information; making an item required enforces a minimum of at least one.

Classifications and Keywords

	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"/>	<input type="text"/>
Enter Personal Keywords	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/> <input type="text"/>	<input type="text"/>

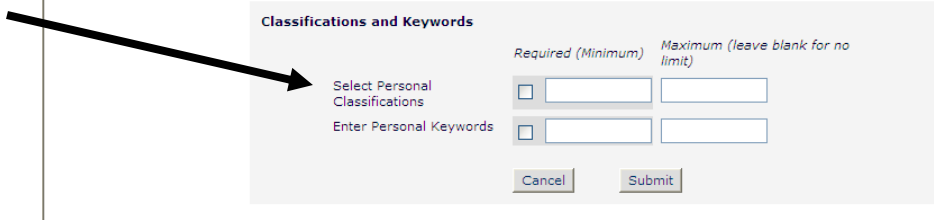
Under PolicyManager, the *Edit Registration Instructions* page has been extended to include new instructional text for the ‘Areas of Interest and Expertise’ section. This text appears on the *Registration*, *Update My Information* and *Search People – Update Information* pages. The default text is shown below; however, you should modify this text to reflect your publication’s policy.

The ‘Select Personal Classifications Pop-Up window’ text defines the instructions the user will see when selecting Classifications.

<p>Areas of Interest and Expertise Instructions (On Registration and Update My Information)</p> <p>View Default Instructions</p>	<p>Please indicate your areas of expertise either by selecting from the pre-defined list using the "Select Personal Classifications" button or by adding your own keywords individually using the "New Keyword" field and associated "Add" button.</p> <p>Revert to Default Instructions</p>
<p>Select Personal Classifications popup window</p> <p>View Default Instructions</p>	<p>Please identify your areas of Interest and specialization by selecting one or more classifications from the list below.</p> <p>Revert to Default Instructions</p>

Publications which allow proxy registration can also make Personal Classifications mandatory when a user logs in after being proxy registered (known as Expedited Reviewer Login). The existing *Configure Expedited Reviewer Login* page on PolicyManager has been extended to accommodate this.

If you make Classifications or Keywords required on login following proxy registration, you need to define a minimum number to be entered. You may also define an optional upper limit to be applied at the same time.



The screenshot shows a form titled "Classifications and Keywords". It has two rows of input fields. The first row is for "Select Personal Classifications" and the second is for "Enter Personal Keywords". Each row has a checkbox, a "Required (Minimum)" input field, and a "Maximum (leave blank for no limit)" input field. Below the input fields are "Cancel" and "Submit" buttons. A black arrow points from the left margin to the checkbox in the first row.

In addition, a new mail merge field `%UPDATE_CLASSIFICATIONS_KEYWORDS_DEEP_LINK%` is available for publications to use in all letters. When this merge field is included in a letter, it is replaced with a deep link for the recipient of the letter (the link is not visible in CC'd letters or in history). Clicking the deep link brings the user directly to a page where they may update their Personal Classifications.

Assign Editor Enhancements

In EM version 6.0, the Invite/Assign Editor interface does not allow the user to choose a different Assign Editor letter, nor is there the ability to choose or customize the Assign Editor Notification Letters.

In version 6.1, the Invite/Assign Editor screen flow is streamlined and enhanced to allow users to choose different letters and customize those letters before sending.

On the *Assign Editor* page, the ‘Send Default Letter’ and ‘Send Custom Letter’ buttons are replaced by a single ‘Proceed’ button.

Assign Editor

Submission Number:
JOURNAL-S-07-00019

Title: "Anesthesiology and You."

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

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

Manuscript Classifications

(1) Anesthesiology

Select	Editor Role	Editor Name	# Current Assignments	# Classification Matches	Classification Matches	Available during Next 30 days
<input type="radio"/>	Editor in Chief	Carol Channing, MD	28	0		Yes
<input type="radio"/>	Associate Editor	John Colicos	2	0		Yes
<input type="radio"/>	Associate Editor	Richard Dawson, MD	15	0		Yes
<input type="radio"/>	Production Editor	Edmund Editor, PhD	0	0		Yes
<input type="radio"/>	New Test Editor	Eugene Editor, MD	5	0		Yes

Once the user has selected an Editor and clicks the ‘Proceed’ button, he is taken to a new *Assign Editor – Confirm Selection and Customize Letter* page, where he can choose another letter for the Editor being invited/assigned and customize letters to those configured to receive notification when an Editor is assigned.

Assign Editor - Confirm Selection and Customize Letters

The following people are configured to receive a letter when an Editor is assigned to a submission. Click **Customize** if you want to personalize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to an individual, click the Letter drop-down box next to that person's name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If there is a person in the list to whom you do not want to send a letter, check the Do Not Send Letter box next to that person's name. When you click **Confirm Selections and Send Letters**, that person will not be sent a letter.

Editor Being Assigned			
Name	Letter		Do Not Send Letter
Ed Editor, M.D. (Editor-in-Chief) Unavailable	Assign Editor ▼	Customize	<input type="checkbox"/>

Others Notified of Editor Assignment			
Name	Letter		Do Not Send Letter
Doug. Kilgore (Editorial Assistant)	Editor Assigned ▼	Customize	<input type="checkbox"/>
H. Kitaoka, M.D. (Author)	Editor Has Been Assigned ▼	Customize	<input type="checkbox"/>

NOTE: The letters in the drop-down lists are limited to the new 'Invite/Assign/Unassign Editor' Letter Family in PolicyManager. When your publication upgrades to version 6.1, all letters associated with the 'Editor Assigned (Not Invited)' and 'Editor Assigned Notification' events in ActionManager are automatically assigned to this new Letter Family.

If your publication Invites Editors (rather than assigning them automatically), users will see a slightly different *Invite Editor – Confirm Selection and Customize Letter* page. All letters associated with the 'Editor Invited for Assignment' and 'Editor Assigned Notification' events are shown, with the drop-down selections limited to the new 'Invite/Assign/Unassign Editor' Letter Family.

Invite Editor - Confirm Selection and Customize Letters

The following people are configured to receive a letter when an Editor is invited to be assigned to a submission. Click **Customize** if you want to personalize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to an individual, click the Letter drop-down box next to that person's name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If there is a person in the list to whom you do not want to send a letter, check the Do Not Send Letter box next to that person's name. When you click **Confirm Selections and Send Letters**, that person will not be sent a letter.

Editor to Invite			
Name	Letter		Do Not Send Letter
Ed Editor, M.D. (Editor-in-Chief) Unavailable	Invite Editor ▾	Customize	<input type="checkbox"/>

Others Notified of Editor Invitation			
Name	Letter		Do Not Send Letter
Raj Rao (Author)	Editor Invited ▾	Customize	<input type="checkbox"/>

Unassign Editor Enhancements

In EM version 6.0, Editor Roles with appropriate RoleManager permission can ‘undo’ Editor assignments, but only before any Reviewers have been invited or assigned.

In EM version 6.1, when an Editor is unassigned the user will have the option of immediately switching to a new Editor, or ‘rolling back’ the assignment to the previous Editor in the chain. Editors can also be unassigned after Reviewers have been invited or assigned. An Editor assignment may be switched to another Editor or rolled back for any submission where the ‘Notify Author’ letter has not been saved (to send later) and/or sent to the Author.

When a submission is rolled back, the submission moves back ‘up the chain’ to the assigning Editor (i.e. back to the *New Submissions Requiring Assignment* or *New Assignments* folder). Only a Handling Editor can be unassigned (i.e. an Editor cannot be unassigned from the middle of an Editor chain). The submission then remains ‘unassigned’ until the Editor clicks the Assign Editor link and assigns a new Editor. Note this is the current functionality for Undo Editor Assignment. If Reviewers have already been invited, they would report to the previously assigned Editor.

If there is only one Editor in the chain, an Editor assignment must be immediately switched to a new Editor. The new Editor would immediately assume responsibility for the submission.

Editor Roles with permission to ‘Unassign Other Editors’ or ‘Unassign Myself’ will observe the following terminology changes in the system:

1. The Undo Assignment and Undo Editor Assignment action links are changed to a universal Unassign Editor link on the following pages:
 - New Assignments
 - Search Submissions
 - View All Assigned Submissions
 - Group by Editors I Assigned
 - Group by Editors with Current Responsibility
 - Group by Manuscript Status
2. Since Editors can now be unassigned after Reviewers are invited, the Unassign Editor action link is added to several pages (as long as the Editor Role has permission to ‘Unassign Myself’ (and it is his assignment) or ‘Unassign Other Editors’ (and it is another Editor’s assignment)):
 - Submissions with 0 (1, 2, 3, 4+) Reviews Complete
 - Submissions with Required Reviews Complete
 - Submissions Requiring Additional Reviewers
 - Submissions with One or More Late Reviews
 - Submissions with Reviewers Invited - No Response

NOTE: If a submission’s decision has been rescinded, the Unassign Editor link is

available, unless the 'Notify Author' letter has been saved (to send later) or if the Notify Author letter has been sent to the Author.

NOTE: The Unassign Editor link does not display for submissions that have not yet been assigned to an Editor (e.g. new submission received by the editorial office). Exception: If the first Editor in the chain has been invited, but has not yet agreed, then the Unassign Editor link is displayed.

When an Editor clicks the Unassign Editor link, he now has the option to 'roll back' the Editor assignment, or 'switch' to another Editor.

Unassign Editor

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

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

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

Cancel Switch to New Editor Roll Back to Previous Editor

NOTE: If the Editor being unassigned is the *first assigned* Editor, the 'Roll Back to Previous Editor' button is suppressed (i.e. the submission cannot be rolled back if there are no other Editors in the chain).

If the user chooses 'Switch to New Editor', he is taken to the new *Switch to New Editor* page, which is very similar to the regular *Assign Editor* page. When an assignment is switched to a new Editor, the following changes occur in the system:

1. The Document Status is changed to 'Editor Unassigned' (for historical tracking purposes), and then immediately reverts to the same status the submission was in prior to the Editor being unassigned (e.g. With Editor, etc.).
2. The submission moves to its previous folder (*New Submissions Requiring Assignment* or *New Assignments*).
3. When the new Editor is assigned (switched to), the submission will appear in the appropriate 'under review' folders for the newly assigned Editor (i.e. whichever folders the submission was displayed in before the Editor was unassigned, the submission will display in those same folders for the newly assigned Editor).

Switch to New Editor

Manuscript Number:
AmyTest-60-06-21

Title: Test Workflow #3

Please select the Editor to whom you would like to assign this submission. You can send this Editor either the default editor assignment letter or a customized letter. You will also have the opportunity to customize the letter being sent to the Editor who is being assigned.

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

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during Next 60 days
<input type="radio"/>	Managing Editor's "Role"	Reébert Mary, PhD	0	0		Yes
	Guest Editor (This Editor is being unassigned)	Dale Arnold, MD	14	0		Yes
<input type="radio"/>	Guest Editor	Jerry Callahan, PhD	1	0		Yes
<input type="radio"/>	Guest Editor	Ed J. Edward	9	0		Yes
<input type="radio"/>	Guest Editor	Istvan Winkler, PhD	5	0		Yes
<input type="radio"/>	Editor In Chief	Luke G. Shepherd, PhD, MD	156	0		Yes
<input type="radio"/>	Associate's "Editor"	Dietz D. Agar, Jr.	9	0		Yes
	Associate's "Editor" (This editor has declined the assignment)	Annie The Dog, PhD	24	0		Yes
<input type="radio"/>	Associate's "Editor"	Five T. Editor, PhD	1	0		Yes
	Associate's "Editor" (This Editor is blocked (blinded) from access to this manuscript)	Four T. Editor	1	0		Yes
<input type="radio"/>	Associate's "Editor"	Three T. Editor, PhD	0	0		Yes
<input type="radio"/>	Associate's "Editor"	Lyndon Holmes	2	0		Yes
<input type="radio"/>	Associate's "Editor"	Jenna Lavelle	6	0		Yes

Cancel

Proceed

Once the user has selected a new (switch to) Editor and clicks the 'Proceed' button, he is taken to the *Switch to New Editor – Confirm Selections and Customize Letters* page, where he can choose and customize letters to the following people:

1. The Editor being unassigned. The letter is associated with the 'Unassign Editor' event in ActionManager.
2. Others who are notified that an Editor has been unassigned (e.g. office staff, Author, Reviewers associated with the submission). Letter(s) is associated with the 'Unassign Editor Notification' event in ActionManager.
3. The New (switched to) Editor being assigned. Letter(s) is associated with the 'Assign Editor' event in ActionManager.
 - Important Note: Publications using Invite Editor functionality must automatically assign the Editor in a switch, because the submission cannot be in limbo (time between Editor being invited and agreeing/declining to take the assignment). It is possible that publications using Invite Editor functionality would not have any letters configured for the Assign Editor event. However, this would not be a problem, because the Editor assignment is still possible, even if no letter is configured. In this case, the new Editor would be shown in the 'New Editor Being Assigned (Switched To)' section, with no letter.
4. Others who need to be notified that a new Editor has been assigned (e.g. office staff, Corresponding Author, other Editors). Letter(s) is associated with the 'Assign Editor Notification' event in ActionManager.

Switch to New Editor - Confirm Selection and Customize Letters

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

Click **Customize** if you want to personalize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to an individual, click the Letter drop-down box next to that person's name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If there is a person in the list to whom you do not want to send a letter, check the Do Not Send Letter box next to that person's name. When you click **Confirm Selections and Send Letters**, that person will not be sent a letter.

Editor Being Unassigned

Name	Letter		Do Not Send Letter
Ed Editor, M.D. (Editor-in-Chief)	Unassign Editor ▾	Customize	<input type="checkbox"/>

Others Notified of Editor Unassignment

Name	Letter		Do Not Send Letter
Douglas J. Kilgore (Editorial Assistant)	Editor Unassigned ▾	Customize	<input type="checkbox"/>
Sam Shepard (Reviewer)	Editor Unassigned ▾	Customize	<input type="checkbox"/>
H. Kitaoka, M.D. (Author)	Editor Has Been Unassigned ▾	Customize	<input type="checkbox"/>

New Editor Being Assigned (Switched To)

Name	Letter		Do Not Send Letter
Dora Editora, M.D. (Associate Editor) Unavailable	Assign Editor ▾	Customize	<input type="checkbox"/>

Others Notified of Editor Assignment (Switched To)

Name	Letter		Do Not Send Letter
Henry Sampson (Managing Editor)	Editor Assigned ▾	Customize	<input type="checkbox"/>

[Cancel](#)

[Confirm Selections and Send Letters](#)

NOTE: The letters in the drop-down lists are limited to the new 'Invite/Assign/Unassign Editor' Letter Family in PolicyManager.

If the user chooses 'Roll Back to Previous Editor' on the *Unassign Editor* page, he is taken to the *Roll Back to Previous Editor – Confirm Selections and Customize Letters* page.

Roll Back to Previous Editor - Confirm Selection and Customize Letters

The following people are configured to receive a letter when an Editor is unassigned for a submission, and the submission is reassigned (rolled back) to the previous Editor.

Click **Customize** if you want to personalize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to an individual, click the Letter drop-down box next to that person's name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If there is a person in the list to whom you do not want to send a letter, check the Do Not Send Letter box next to that person's name. When you click **Confirm Selections and Send Letters**, that person will not be sent a letter.

Editor Being Unassigned			
Name	Letter		Do Not Send Letter
Ed Editor, M.D. (Editor-in-Chief)	Unassign Editor ▼	Customize	<input type="checkbox"/>

Others Notified of Editor Unassignment			
Name	Letter		Do Not Send Letter
Douglas J. Kilgore (Editorial Assistant)	Editor Unassigned ▼	Customize	<input type="checkbox"/>
Sam Shepard (Reviewer)	Editor Unassigned ▼	Customize	<input type="checkbox"/>
H. Kitaoka, M.D. (Author)	Editor Has Been Unassigned ▼	Customize	<input type="checkbox"/>

When an assignment is rolled back to the previous Editor BEFORE Reviewers have been invited, it is typically because the assignment was made in error (i.e. Editor A assigned Editor B, and then immediately realized he made a mistake). Therefore, the Document Status reverts to the previous status (e.g. from 'Received by Editor' to 'Submitted to Journal') and can be seen in Status History. The submission moves back up into the *New/Revised Submissions Requiring Assignment* or *New Assignments* folder, depending on which Editor Role assigned the submission initially. Otherwise, there is no other record of the original assigned Editor (e.g. the Editor who was assigned in error).

When an assignment is rolled back to the previous Editor AFTER Reviewers have been invited, it is typically because the assigned Editor has moved on to another role at the publication, has left the publication, or can no longer perform his duties in the current capacity for the publication. In this case, the Document Status is changed to 'Editor Unassigned' (for historical tracking purposes), and then immediately reverts to the status the submission was in prior to the Editor being unassigned (e.g. Under Review, Required Reviews Complete, etc.). If the previous Editor is a higher Editor in the chain, the previous Editor will be charged with the time the submission was with the unassigned Editor (e.g. Editor Performance Statistics).

A new merge field [%UNASSIGNED_EDITOR_NAME%] can be used in letters

configured for the 'Editor Unassigned' and 'Editor Unassigned Notification' events. This merge field is best used in Editor notification letters, and will pull in the 'REALNAME' of the Editor who was unassigned.

There are some subtle changes to Reports to account for unassigned Editors, particularly if an Editor is unassigned after Reviewers have been assigned.

1. Editor Reminder Reports – '# Reminders Sent' will count reminders that may have actually been sent to the previous Editor.
2. Manuscript Rating Report – Rating may actually have been entered by the previous (unassigned) Editor.
3. Editor Performance Report
 - Average Number of Reviewers per Submission – New Editor will get 'credited' for Reviewers the previous Editor assigned.
 - Total Number of Reviewers Utilized - new Editor will get 'credited' for Reviewers the previous Editor assigned.
 - Number of Unique Reviewers Utilized - New Editor will get 'credited' for Reviewers the previous Editor assigned.
 - Time to Decision – New Editor will be 'penalized' for time spent by the first Editor before he was unassigned.
 - New text is displayed in the 'Editor Decision Summary' section: "Editors who assume responsibility for submissions where another Editor was unassigned will inherit all time and Reviewer statistics associated with that original Editor."

TO CONFIGURE:

No configuration is required if your publication was using the 'Undo Editor Assignment' feature in version 6.0. If you would like to start using Unassign Editor functionality in version 6.1, you must enable the 'Unassign Other Editors' and/or 'Unassign Myself' permissions in Editor RoleManager.

Edit Role Definition

Role Name:
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

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

- New Submissions
- Editor Assignment
 - Receive Assignments in 'New Assignments' Folder
 - Receive Assignments without Invitation
 - Receive Invitations for Assignments
 - Assign Editor
 - Redirect to Other Editor (and be removed from Editor Chain)
 - Change Corresponding Editor
 - Blind Editor
 - Unassign Other Editors
 - Unassign Myself

Administrators will also see the following terminology changes when the publication is upgraded to version 6.1:

1. ActionManager events renamed:
 - 'Undo Editor Assignment' is changed to 'Unassign Editor'
 - 'Undo Editor Assignment Notification' is changed to 'Unassign Editor Notification'
2. Document Status Terms associated with these events are also renamed:
 - 'Undo Editor Assignment' is changed to 'Unassign Editor'
 - 'Undo Editor Assignment Notification' is changed to 'Unassign Editor Notification'
3. Editor RoleManager permissions are renamed:
 - 'Undo Other Editors' Assignments' is changed to 'Unassign Other Editors'
 - 'Undo My Assignments' is changed to 'Unassign Myself'
4. New 'Invite/Assign/Unassign Editor' Letter Family. When the site is upgraded to version 6.1, all letters configured for the following events will be automatically assigned to this new Letter Family. The benefit is that Editors selecting letters for these functions will choose only from the letters in this letter family, rather than having to scroll through the list of ALL letters in the system.
 - Editor Assigned (Not Invited)
 - Editor Invited for Assignment
 - Editor Assignment Notification
 - Undo Editor Assignment
 - Undo Editor Assignment Notification

Proposing Reviewers

In current functionality, Editors may select Reviewers to invite immediately, or Alternate Reviewers who will be used if an invited Reviewer declines the invitation or is un-invited.

Under new functionality, Editors may also Propose Reviewers. This allows Editors to recommend Reviewers for other Editors to use. Proposed Reviewers are listed on the main Reviewer Invitation summary pages, and can be selected directly to use as Invited or Alternate Reviewers.

Reviewer Selection Summary - Submission JXYZ37 "Testing once more"

[Manuscript Details](#)

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 0 [\[Change\]](#) review(s) have been completed.
Automatically un-invite Reviewers who do not respond within 0 [\[Change\]](#) day(s). Set this number to 0 to turn off the automatic un-invitation process for this submission.

Reviewer Search

Search My **Publication** Search for Reviewers from All Reviewers

Search Another **Publication** Choose Publication mode Search for Reviewers

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers

Gary McTesty (Referee) Reviewer Invited Un-invite
<div style="display: flex; justify-content: space-between;"> ↓ Jane Smith (Editorial Board Reviewer) Linked Alternate Un-link </div>
<div style="display: flex; justify-content: space-between;"> ↑ Ralph Richardson (Referee) Linked Alternate Un-link </div>
Ronaldo X Reviewer1, BSc (Referee) Reviewer Invited Un-invite
<div style="display: flex; justify-content: space-between;"> Paul Schmall (Referee) Linked Alternate Un-link </div>
Reginald Reviewer-Three (Referee) Un-invited Before Agreeing to Review
<div style="display: flex; justify-content: space-between;"> ↓ Bert Schmert (Referee) Linked Alternate Promote Un-link </div>
<div style="display: flex; justify-content: space-between;"> ↑ Ed Schmedd (Referee) Linked Alternate Promote Un-link </div>

Alternate Reviewers

<div style="display: flex; justify-content: space-between;"> ↓ Annie Associate-Editor (Referee) Link Promote Remove </div>
<div style="display: flex; justify-content: space-between;"> ↑ Rabelais M Reviewer-Two, DD (Referee) Link Promote Remove </div>

[Alternate Reviewer Invitation Letters](#)

Alternate Reviewers will be promoted automatically ([more...](#)).

Proposed Reviewers

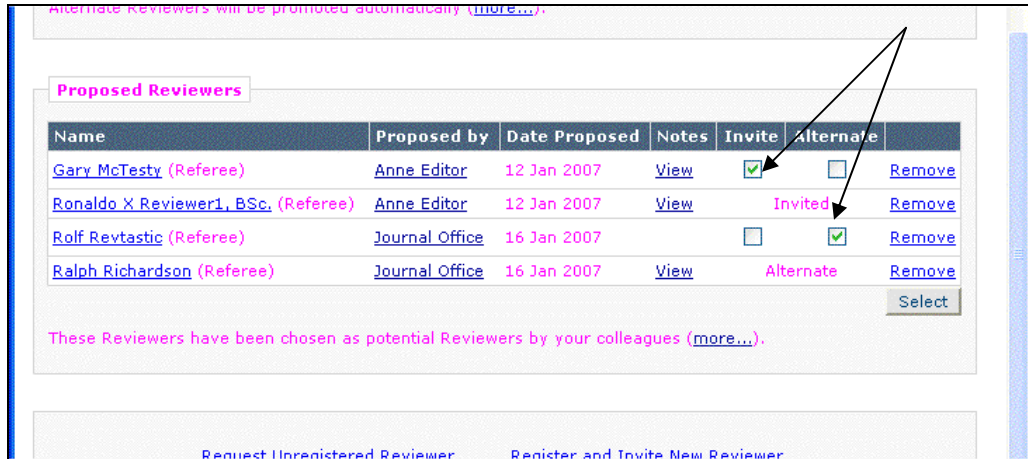
Name	Proposed by	Date Proposed	Notes	Invite	Alternate	
Gary McTesty (Referee)	Anne Editor	12 Jan 2007	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Remove
Ronaldo X Reviewer1, BSc (Referee)	Anne Editor	12 Jan 2007	View		Invited	Remove
Rolf Revtastic (Referee)	Journal Office	16 Jan 2007		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
Ralph Richardson (Referee)	Journal Office	16 Jan 2007	View		Alternate	Remove

These Reviewers have been chosen as potential Reviewers by your colleagues ([more...](#)).

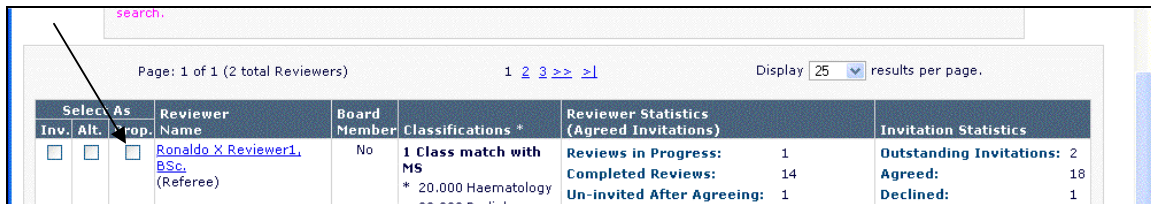
[Request Unregistered Reviewer](#) [Register and Invite New Reviewer](#)
[My Suggest Reviewer Preferences](#) [My Reviewer Display Preferences](#)

[Return to \[Referring Page\]](#)
[Return to Main Menu](#)

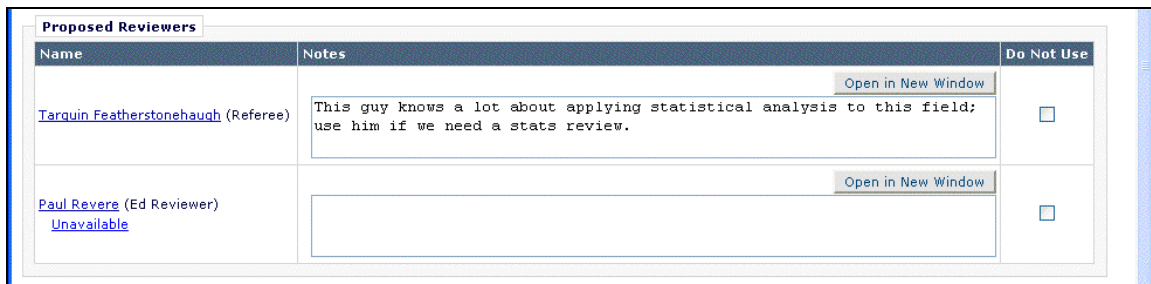
If an Editor has previously Proposed one or more Reviewers, any Editor with the ‘Invite Reviewers’ or ‘Select Alternate Reviewers’ permissions can use the Proposed Reviewers immediately by checking the relevant selection box on the *Reviewer Selection Summary* page, and clicking the ‘Select’ button. Editors with appropriate permission can also remove Proposed Reviewers from the list.



When an Editor searches for a Reviewer, he will now see up to three selection checkboxes, depending on RoleManager permissions. Editors with the new ‘Propose Reviewer’ permission will see a ‘Select as: Prop.’ (Proposed) checkbox next to each name in the search results.



When confirming the selections, the Editor can type Notes associated with each Proposed Reviewer.



The Notes are then available for others to see by clicking the View action Link for each Proposed Reviewer.

The list of Proposed Reviewers is displayed on the default *Editorial Details* page. If your publication is using a Custom Details page layout, and you want to see Proposed Reviewers on the Custom Details pages, you must modify the Custom Details page layouts in PolicyManager.

The screenshot displays a web interface for managing reviewers. It is divided into several sections:

- RECOMMENDATION:** (Header)
- REVIEWERS:** (Section header with a [Top](#) link)
 - Name:** Jane DD Reviewer [\[Proxy\]](#)
 - Review Status:** Reviewer Invited
 - Date Reviewer Invited:** May 23, 2007
 - Date Submission Due:** 05/23/2007 (calendar icon) (mm/dd/yyyy)
 - Elapsed Days:** 0
- ALTERNATE REVIEWERS:** (Section header with a [Top](#) link)
 - Alternate Reviewers:** Arnold Layne (Referee), Emily Pike (Ed Reviewer) *(Linked to Jane DD Reviewer)*
- REVIEWERS PROPOSED BY EDITORS:** (Section header with a [Top](#) link)
 - Reviewers Proposed by Editors:** Tarquin Featherstonehaugh (Referee), Paul Revere (Ed Reviewer)
- AUTHOR(S) INVITED TO SUBMIT COMMENTARY:** (Section header with a [Top](#) link)

At the bottom of the form are two buttons: [Cancel](#) and [Save and Close](#).

TO CONFIGURE:

Go to Editor RoleManager and enable the new 'Propose Reviewer' permission to allow Editors to recommend Reviewers for other Editors to select.

The associated 'Remove Proposed Reviewers' permission allows Editors to remove Proposed Reviewers. Most Editors who can Propose Reviewers should also be configured with this permission, but you can allow other Editors who cannot Propose Reviewers to remove unwanted Proposed Reviewers.

Both of these new permissions are **not** selected when the publication upgrades to version 6.1 and must be enabled manually.

- ☐ Reviewer Invitations
 - Invite Reviewers
 - Un-Invite Reviewers
 - Search Reviewers in Other Journals
 - Override Reviewer Due Date
 - Propose Reviewers
 - Remove Proposed Reviewers
 - Select Alternate Reviewers
 - Promote Alternate Reviewers
 - Link/Un-link Alternate Reviewers
 - Remove Alternate Reviewers
 - Request Unregistered Reviewers
 - Edit Reviewer Comments and Ratings after Review is Submitted
- 

NOTE: An Editor who is given this new permission will see the Invite Reviewer action link in folders (even if he does not have permission to ‘Invite Reviewers ‘or ‘Select Alternate Reviewers’). This link is used to initiate a search for Reviewers to Propose, in the same way as an Editor currently searches for Reviewers to Invite or select as Alternate Reviewers.

Linking Alternate Reviewers to a Specific Reviewer

In current functionality, Alternate Reviewers form a pool of ‘backup’ Reviewers, and the next Alternate Reviewer in line is automatically promoted whenever a Reviewer (with the same Reviewer Role) declines an invitation or is un-invited. This means that an alternate Biostat Reviewer would automatically replace another Biostat Reviewer, if the invited Biostat Reviewer declined the invitation.

Under new functionality, you can link one or more selected Alternate Reviewers to a specific Invited Reviewer. These Alternate Reviewers are only promoted if the Reviewer they are linked to is un-invited or declines the invitation, and will be promoted before any un-linked Alternate Reviewers are used. It is possible to combine linked and non-linked Alternate Reviewers within the same submission.

Only one Linked Alternate Reviewer (the first) is promoted – this then becomes the primary Invited Reviewer, and any other Alternate Reviewers that were linked to the first Reviewer to decline or be un-invited are then linked to the promoted, Linked Alternate. Note this only applies if the submission’s Article Type is configured to ‘Automatically Promote Alternate Reviewers’ in PolicyManager (this can now be turned off under new functionality as described the *Preventing Automatic Promotion of Alternate Reviewers* section of this document).

When inviting Reviewers, the display of the initial *Reviewer Selection Summary* page now lists the Linked Alternate Reviewers beneath the Invited Reviewer they are linked to. Editors with permission to ‘Link/Unlink Alternate Reviewers’ will see a Link action link beside the previously selected Alternate Reviewers, allowing them to link the Alternate directly to a specific Invited Reviewer. Editors with this permission will also see an Un-Link action link beside linked Alternate Reviewers, allowing them to break the link between the primary Invited Reviewer and the Alternate Reviewer.

Invited Reviewers and Linked Alternate Reviewers		
Gary McTesty (Referee)	Reviewer Invited	Un-invite
Jane Smith (Editorial Board Reviewer)	Linked Alternate	Un-Link
Ronaldo X Reviewer1, BSc. (Referee)	Reviewer Invited	Un-invite
Reginald Reviewer-Three (Referee)	Un-invited Before Agreeing to Review	

Alternate Reviewers		
Annie Associate-Editor (Referee)	Link	Promote Remove
Rabelais M Reviewer-Two, DD (Referee)	Link	Promote Remove
Ralph Richardson (Referee)	Link	Promote Remove

Clicking the Link action link takes the Editor to a new page where he can select which invited Reviewer the Alternate should be linked to.

Link Alternate Reviewer to Invited Reviewer

Select the Primary Reviewer to link this Alternate Reviewer to.

Once linked, this Reviewer will only be promoted when the selected Primary Reviewer declines or is uninvited. This promotion may be automatic if your publication is so configured.

Link Annie Associate-Editor to:

- [Gary McTesty](#) (Referee)
- [Ronaldo X. Reviewer1, BSc.](#) (Referee)
- [Reginald Reviewer-Three](#) (Referee)

Linking an Alternate Reviewer to an Invited Reviewer moves the Alternate Reviewer up to the main Invited Reviewers table. Both the primary, Invited Reviewer and the Alternate Reviewers must be in place in the main tables before they can be linked.

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers		
Gary McTesty (Referee)	Reviewer Invited	Un-invite
Ronaldo X Reviewer1, BSc. (Referee)	Reviewer Invited	Un-invite
Reginald Reviewer-Three (Referee)	Un-invited Before Agreeing to Review	

Alternate Reviewers		
Annie Associate-Editor (Referee)	Link	Promote Remove
Babelais M Reviewer-Two_DD (Referee)	Link	Promote Remove
Jane Smith (Editorial Board Reviewer)	Link	Promote Remove
Ralph Richardson (Referee)	Link	Promote Remove
Paul Schmall (Referee)	Link	Promote Remove
Bert Schmert (Referee)	Link	Promote Remove
Ed Schmedd (Referee)	Link	Promote Remove

[Alternate Reviewer Invitation Letters](#)

Alternate Reviewers will be promoted automatically ([more...](#)).

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers		
Gary McTesty (Referee)	Reviewer Invited	Un-invite
Jane Smith (Editorial Board Reviewer)	Linked Alternate	Un-link
Ronaldo X Reviewer1, BSc. (Referee)	Reviewer Invited	Un-invite
Reginald Reviewer-Three (Referee)	Un-invited Before Agreeing to Review	

Alternate Reviewers		
Annie Associate-Editor (Referee)	Link	Promote Remove
Babelais M Reviewer-Two_DD (Referee)	Link	Promote Remove
Ralph Richardson (Referee)	Link	Promote Remove
Paul Schmall (Referee)	Link	Promote Remove
Bert Schmert (Referee)	Link	Promote Remove
Ed Schmedd (Referee)	Link	Promote Remove

[Alternate Reviewer Invitation Letters](#)

Alternate Reviewers will be promoted automatically ([more...](#)).

A single Invited Reviewer may have several Linked Alternate Reviewers, but an Alternate Reviewer can be linked to only one Invited Reviewer. The first linked Alternate Reviewer is promoted when an Invited Reviewer declines or is un-invited, and the remaining linked Alternates become linked to the Reviewer who was promoted. Editors can re-order the Alternates linked to a single Invited Reviewer using the up/down arrows.

Search Another Publication Choose Publication mode Search for Reviewers mode

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers		
Gary McTesty (Referee)	Reviewer Invited	
Jane Smith (Editorial Board Reviewer)	Linked Alternate	Un-link
Ralph Richardson (Referee)	Linked Alternate	Un-link
Ronaldo X Reviewer1, BSc. (Referee)	Reviewer Invited	
Paul Schmall (Referee)	Linked Alternate	Un-link
Reginald Reviewer-Three (Referee)	Un-invited Before Agreeing to Review	
Bert Schmert (Referee)	Linked Alternate	Un-link
Ed Schmedd (Referee)	Linked Alternate	Un-link

Alternate Reviewers		
Annie Associate-Editor (Referee)	Link	Remove

TO CONFIGURE:

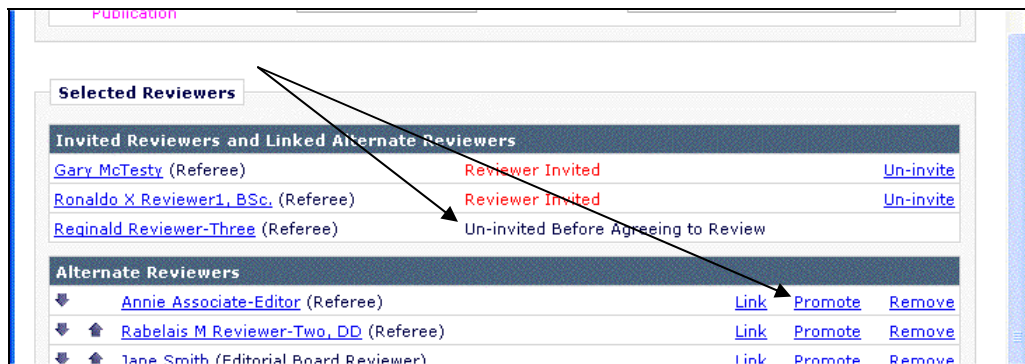
Go to Editor RoleManager and enable the new ‘Link/Unlink Alternate Reviewers’ permission to allow Editors to link Alternate Reviewers to specific Invited Reviewers. This permission is **not** automatically enabled when the publication upgrades to version 6.1 and must be enabled manually.



Preventing Automatic Promotion of Alternate Reviewers

In EM version 6.0, the next available Alternate Reviewer is always automatically promoted whenever a Reviewer declines an invitation or is un-invited. There is no opportunity for an Editor to intervene.

Under new functionality, automatic promotion of Alternates can be turned off for selected Article Types in PolicyManager. If automatic promotion is turned off, an Editor must go into the submission and manually promote the Alternate Reviewer they wish to use. Or, the Editor may decide to first contact the original Reviewer and re-invite them, for example.



This also applies to Linked Alternate Reviewers, who will not be promoted unless the Promote link is clicked on the *Reviewer Selection Summary* page.



TO CONFIGURE:

On the *Edit Article Type* page in PolicyManager, you will see a new 'Automatically Promote Alternate Reviewers' option. **This option is enabled by default** when your publication upgrades to version 6.1 and when a new Article Type is created. If you prefer to have all Alternate Reviewers promoted manually, you must edit each Article Type to clear this setting.

Edit Article Type

Article Type:
Maximum Article Type name is 40 characters.

Family: Regular

- Hide** When you **Hide** an Article Type, the Article Type will be deactivated (not available for new or revised manuscripts).
- Allow file uploads from arXiv.org server

Author Parameters

First Revision

Subsequent Revisions

Number of days Author has to Revise Submission:

Set this value to zero if you do not want to use Revision Due Dates.

Authors must suggest a minimum of Reviewers when submitting their manuscripts.

Reviewer Parameters:

New and Revised Submissions

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

Must be 0 or greater.

Number of Days Reviewer has to Respond to Invitation:

Set this value to zero to turn off the automatic un-invitation process for all new submissions of this type.

Automatically Promote Alternate Reviewers:

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

Set the values required for a new and/or revised manuscript

New Submission

Revised Submission

Days to Review This Article Type:

Article Type Parameters

New Submission

Revised Submission

Include on PDF Cover Page

Set "Short Title" Preferences:

Editor/Author

Reviewer

Set "Select Section/Category" Preferences:

Set "Submit Abstract" Preferences:

Set "Enter Keywords" Preferences:

NOTE: Changing the 'Automatically Promote Alternate Reviewers' setting will have immediate effect on all submissions of this type already in the system (i.e. it does not just apply to new submissions received by the editorial office after the setting is changed).

New Criteria for Reviewer Searches

When an Editor searches for Reviewers to invite, propose, or suggest as an Alternate, three new search criteria are now available:

1. E-mail Address
2. Personal Classifications
3. Personal Keywords

Search For Reviewers - Manuscript Number DEMO-D-03-00027
"training stupid dogs"

[View Reviews and Comments](#) [Manuscript Details](#) [Register and Invite New Reviewer](#)

Change Search Type

Search My Publication Search for Reviewers from Reviewer

Search for Reviewers

[Help with Searching](#) [Insert Special Character](#)

Criterion	Selector	Value	
Last Name	Begins With		END
Last Name	Begins With		END
First Name	Begins With		END
Email Address	Begins With		END
Position	Begins With		END
Department	Begins With		END
Institution	Begins With		END
City	Begins With		END
State	Begins With		END
Country	Begins With		END
Personal Classifications			
Personal Keywords			

[Register and Invite New Reviewer](#)

TO CONFIGURE:

No configuration is required to make the new search criteria appear. However, your publication should be using Personal Classifications or the new Personal Keywords features for these options to be useful.

Streamlined Reviewer Searching

To support the new Propose Reviewer and Link Alternate Reviewer features, the *Search Reviewer* pages have been reorganized. Even if your publication is not taking advantage of these new features, Editors who invite Reviewers should be aware of several enhancements to make the Reviewer selection process more streamlined.

The Invited and Alternate Reviewer tables have been combined within a single 'Selected Reviewers' section on the page, with the main Invited Reviewers table being renamed.

Editors who do not work on IJRS-linked publications will now see a single 'Search My Publication' option; there are no longer separate searches for Invited and Alternate Reviewers.

Reviewer Selection Summary - Submission JXYZ37R1
"Testing once more"
[Manuscript Details](#)

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 0 [\[Change\]](#) review(s) have been completed.
Automatically un-invite Reviewers who do not respond within 0 [\[Change\]](#) day(s). Set this number to 0 to turn off the automatic un-invitation process for this submission.

Reviewer Search

Search My **Publication** Search for Reviewers from All Reviewers

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers
There are no Reviewers Invited for this submission.

Alternate Reviewers
There are currently no Alternate Reviewers selected for this submission.
[Alternate Reviewers will be promoted automatically \(more...\)](#)

Proposed Reviewers
No Reviewers have been proposed by any Editor for this submission.
These Reviewers have been chosen as potential Reviewers by your colleagues ([more...](#)).

[Request Unregistered Reviewer](#) [Register and Invite New Reviewer](#)

Similarly, Editors who work on IJRS-linked publications will now see a pair of search options: 'Search My Publication' and 'Search Another Publication' (if they have permission to do so).

Reviewer Selection Summary - Submission JXYZ37R1 "Testing once more"

[View Reviews and Comments](#) [Manuscript Details](#)

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 0 [\[Change\]](#) review(s) have been completed.
Automatically un-invite Reviewers who do not respond within 0 [\[Change\]](#) day(s). Set this number to 0 to turn off the automatic un-invitation process for this submission.

Reviewer Search

Search My Publication Select from Previous Reviewers Go
 Search Another Publication Choose Publication mode: Search for Reviewers

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers

There are no Reviewers Invited for this submission.

Alternate Reviewers

There are currently no Alternate Reviewers selected for this submission.

Under new functionality, Editors carry out a single search for any type of Reviewer (rather than executing one search for a Reviewer to invite immediately and a separate search for Alternate Reviewers). The Editor can then select any type of Reviewer that he has permission to (Primary, Alternate or Proposed) from the results. When presented with the results of a Reviewer search, Editors see up to three separate columns containing selection/check boxes – one for selecting Reviewers to Invite immediately, one to select Alternate Reviewers, and one to select Reviewers to Propose.

Reviewer Candidates

Select a checkbox by each person you wish to select as a Reviewer ([less](#)).
Depending on your permissions, you may select people to be primary Reviewers to be Invited first ("Inv."), Alternate Reviewers ("Alt.") who may be invited to replace Invited Reviewers who decline an invitation or are un-invited, or Proposed Reviewers ("Prop.") for another Editor to select from at a later date. Your selections will be retained when you change to a different results page or change the search.

Page: 1 of 1 (2 total Reviewers) Display 25 results per page.

Select As:	Reviewer	Board Member	Classifications *	Reviewer Statistics (Agreed Invitations)	Invitation Statistics
Inv. Alt. Prop.	Name				
<input checked="" type="checkbox"/>	Ronald S. S. Reviewer1, BSc (Referee) <small>Reviewer Invited Alternate Reviewer for 1 other submission</small>	No	1 Class match with NS * 20.000 Haematology 30.000 Radiology 50.000 Cardiology	Reviews in Progress: 1 Completed Reviews: 14 Un-invited After Agreeing: 1 Terminated After Agreeing: 2 Last Review Agreed: Jul 13, 2005 Last Review Completed: Nov 22, 2004 Last Review Declined: May 20, 2003 Avg Days Outstanding: 0 Manuscript Rating: 70.83 Reviewer Rating: 0	Outstanding Invitations: 2 Agreed: 18 Declined: 1 Un-invited: 9 Terminated: 1 Total Invitations: 31
<input type="checkbox"/>	Jane DD Reviewer (Referee) <small>Proposed Reviewer for this Submission</small>	No		Reviews in Progress: 0 Completed Reviews: 3 Un-invited After Agreeing: 1 Terminated After Agreeing: 1 Last Review Agreed: Jul 10, 2003 Last Review Completed: Jul 02, 2003 Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Reviewer Rating: 0	Outstanding Invitations: 1 Agreed: 5 Declined: 0 Un-invited: 5 Terminated: 1 Total Invitations: 12
<input type="checkbox"/>	Julian Johansson, BSc (Referee) <small>Proposed Reviewer for 3 other Submissions</small>	No	1 Class match with NS * 20.000 Haematology 30.000 Radiology 50.000 Cardiology	Reviews in Progress: 1 Completed Reviews: 14 Un-invited After Agreeing: 1 Terminated After Agreeing: 2 Last Review Agreed: Jul 13, 2005 Last Review Completed: Nov 22, 2004 Last Review Declined: May 20, 2003 Avg Days Outstanding: 0 Manuscript Rating: 70.83 Reviewer Rating: 0	Outstanding Invitations: 2 Agreed: 18 Declined: 1 Un-invited: 9 Terminated: 1 Total Invitations: 31

(* indicates match between Reviewer and Manuscript Classifications)

Page: 1 of 1 (5 total Reviewers) Display 25 results per page.

[Register and Invite New Reviewer](#)
[Request Unregistered Reviewer](#)

If an Editor does not have permission to select a particular type of Reviewer, the

associated column will not appear (i.e. if he does not have permission to ‘Select Alternate Reviewers’, the ‘Alt.’ column is suppressed). If a particular Reviewer has already been selected, the checkboxes are suppressed for that person.

Page: 1 of 1 (2 total Reviewers) 1 2 3 >> >> | Display 25 results per page.

Select As	Reviewer Name	Board Member	Classifications *	Reviewer Statistics (Agreed Invitations)	Invitation Statistics
<input type="checkbox"/>	Ronaldo X Reviewer1, BSc. (Referee) Reviewer Invited Alternate Reviewer for 1 other submission	No	1 Class match with MS * 20.000 Haematology 30.000 Radiology 50.000 Cardiology	Reviews in Progress: 1 Completed Reviews: 14 Un-invited After Agreeing: 1 Terminated After Agreeing: 2 Last Review Agreed: Jul 13, 2005 Last Review Completed: Nov 22, 2004 Last Review Declined: May 20, 2003 Avg Days Outstanding: 0 Manuscript Rating: 70.83 Reviewer Rating: 0	Outstanding Invitations: 2 Agreed: 18 Declined: 1 Un-invited: 9 Terminated: 1 Total Invitations: 31
<input type="checkbox"/>	Jane DD Reviewer (Referee) Proposed Reviewer for this Submission	No		Reviews in Progress: 0 Completed Reviews: 3 Un-invited After Agreeing: 1 Terminated After Agreeing: 1 Last Review Agreed: Jul 10, 2003 Last Review Completed: Jul 02, 2003 Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Reviewer Rating: 0	Outstanding Invitations: 1 Agreed: 5 Declined: 0 Un-invited: 5 Terminated: 1 Total Invitations: 12
<input type="checkbox"/>	Johan Johansson , BSc. (Referee)	No	1 Class match with MS * 20.000 Haematology	Reviews in Progress: 1 Completed Reviews: 14 Un-invited After Agreeing: 1	Outstanding Invitations: 2 Agreed: 18 Declined: 1

Page: 1 of 1 (2 total Reviewers) 1 2 3 >> >> | Display 25 results per page.

Prop.	Reviewer Name	Board Member	Classifications *	Reviewer Statistics (Agreed Invitations)	Invitation Statistics
	Ronaldo X Reviewer1, BSc. (Referee) Reviewer Invited Alternate Reviewer for 1 other submission	No	1 Class match with MS * 20.000 Haematology 30.000 Radiology 50.000 Cardiology	Reviews in Progress: 1 Completed Reviews: 14 Un-invited After Agreeing: 1 Terminated After Agreeing: 2 Last Review Agreed: Jul 13, 2005 Last Review Completed: Nov 22, 2004 Last Review Declined: May 20, 2003 Avg Days Outstanding: 0 Manuscript Rating: 70.83 Reviewer Rating: 0	Outstanding Invitations: 2 Agreed: 18 Declined: 1 Un-invited: 9 Terminated: 1 Total Invitations: 31
	Jane DD Reviewer (Referee) Proposed Reviewer for this Submission	No		Reviews in Progress: 0 Completed Reviews: 3 Un-invited After Agreeing: 1 Terminated After Agreeing: 1 Last Review Agreed: Jul 10, 2003 Last Review Completed: Jul 02, 2003 Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Reviewer Rating: 0	Outstanding Invitations: 1 Agreed: 5 Declined: 0 Un-invited: 5 Terminated: 1 Total Invitations: 12
<input type="checkbox"/>	Johan Johansson , BSc. (Referee)	No	1 Class match with MS * 20.000 Haematology	Reviews in Progress: 1 Completed Reviews: 14	Outstanding Invitations: 2 Agreed: 18

NOTE: A Reviewer who was previously proposed by another Editor may still be selected to be invited or as an Alternate Reviewer. The information shown in red text beneath the Reviewer’s name now informs the Editor that a Reviewer has been proposed for this, or another submission.

The page where Editors assign Reviewer Roles to non-Reviewers who have been selected now confirms what type of Reviewer each person has been selected as.

Assign Reviewer Role

All Reviewer candidates must be assigned a Reviewer Role before being invited to review. Please assign a Reviewer Role to the people who do not yet have roles. You can also check 'Do not use this Person' if you decide not to invite them.

Name	Selected As	Reviewer Role	Do not use this Person
Johan Redactie	Invited	None	<input type="checkbox"/>
D Referee	Alternate	Reviewer	<input type="checkbox"/>
A Rvtest	Proposed	Reviewer	<input type="checkbox"/>

For IJRS-linked publications, additional information is given on the Roles each person has in the publication that was searched.

Assign Reviewer Role

All Reviewer candidates must be assigned a Reviewer Role before being invited to review. Please assign a Reviewer Role to the people who do not yet have roles. You can also check 'Do not use this Person' if you decide not to invite them.

Name	Selected As	Note	Reviewer Role in this Publication	Do not use this Person
Johan Redactie	Invited	This person does not have a Reviewer Role in the publication searched	None	<input type="checkbox"/>
D Referee	Alternate	This person has a Statistical Referee Role in the publication searched	Reviewer	<input type="checkbox"/>
A Rvtest	Proposed		Reviewer	<input type="checkbox"/>

The final confirmation page following Reviewer search and selection now accommodates all three types of Reviewers (Reviewers to invite immediately, Alternate Reviewers and Proposed Reviewers) in a single location. Other benefits on this page include:

1. The instructional text at the top of the page can be 'expanded' or 'collapsed' as the user prefers.
2. Editors with appropriate RoleManager permission can modify due dates.
3. Editors can select previously submitted reviews to include with the Reviewer invitation (this was previously done on the *Reviewer Selection Results* pages).

Select Reviewers - Confirm Selection and Customize Letters

You have selected the following people as **potential Reviewers** ([more...](#)).

Previously Submitted Reviews

The following reviews have been submitted. You may **include** a copy of **each review** in invitations to new Reviewers by clicking the checkbox. To see the review, click the Reviewer's name. **Customize each letter to edit the review text that will be seen by the Invited Reviewer, but note that customizing a letter creates a fixed copy of that letter that is not affected by subsequent changes to your selections.**

Please select any previously submitted reviews for inclusion before customizing invitation letters.

[Ronaldo X Reviewer1, BSc. \(Previous Revision\)](#)

[Jane DD Reviewer6b \(Previous Revision\)](#)

[Eric Reviewer-Four \(Previous Revision\)](#)

Reviewers to Invite

Name	Letter	Due Date	Do not Invite
Jane DD Reviewer (Referee) Unavailable	Reviewer Invitation <input type="button" value="Customize"/>	01/30/2007 <input type="text" value="(mm/dd/yyyy)"/>	<input type="checkbox"/>
John EB Goode (Ed Reviewer)	Reviewer Invitation <input type="button" value="Customize"/>	01/30/2007 <input type="text" value="(mm/dd/yyyy)"/>	<input type="checkbox"/>

Alternate Reviewers

Name	Letter	Days to Review	Do Not Use
Arnold Layne (Referee) Unavailable	Reviewer Invitation <input type="button" value="Customize"/>	<input type="text" value="21"/>	<input type="checkbox"/>
Emily Pike (Ed Reviewer) Unavailable	Reviewer Invitation <input type="button" value="Customize"/>	<input type="text" value="21"/>	<input type="checkbox"/>

Proposed Reviewers

Name	Notes	Do Not Use
Tarquin Featherstonehaugh (Referee)	This guy knows a lot about applying statistical analysis to this field; use him if we need a stats review. <input type="button" value="Open in New Window"/>	<input type="checkbox"/>
Paul Revere (Ed Reviewer) Unavailable	<input type="text" value=""/> <input type="button" value="Open in New Window"/>	<input type="checkbox"/>

Click the 'Change Selections' button to move Reviewers from one category to another (i.e. change a Proposed Reviewer to an Alternate), or to search for more Reviewers without returning to the initial *Reviewer Selection Summary* page and executing a brand new search ('Change Search Type').

For IJRS-linked publications, Editors can also switch between searching the home publication and other publications in the group (if they have sufficient permissions).

Changing Search Type allows an Editor (with appropriate RoleManager permission) to carry out several searches easily, building up a list of selected Invited, Alternate or Proposed Reviewers in any combination, before finally confirming all selections and customizing letters in a single action. This is a significant improvement from version 6.0, where each type of search had to be executed separately, and letters sent separately for each search type. Under new functionality, all Reviewer selections are retained when an

Editor switches to a different search, so when the Editor reaches the final confirmation page, all Reviewers selected after each ‘Change Search Type’ action are presented simultaneously.

Change Reviewer Selections - Manuscript Number JXYZ37R2
"Testing once more"

[View Reviews and Comments](#) [Manuscript Details](#) [Register and Invite New Reviewer](#)

Change Search Type

Search My Publication Search for Reviewers Search for Reviewers from All Reviewers

Search Another Publication Choose Publication Choose Publication mode Search for Reviewers


Reviewer Candidates

Select a checkbox by each person you wish to select as a Reviewer ([...more](#)).

Page: 1 of 1 (2 total Reviewers) 1 2 3 >> >| Display 25 results per page.

Select As			Reviewer Name	Board Member	Classifications *	Reviewer Statistics (Agreed Invitations)								
Inv.	Alt.	Prop.				Reviews in Progress:	Completed Reviews:	Un-invited After Agreeing:	Terminated After Agreeing:	Last Review Agreed:	Last Review Completed:	Last Review Declined:	Avg Days Outstanding:	Manuscript Rating:
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Jane DD Reviewer (Referee) Alternate Reviewer for 1 other submission	No	1 Class match with MS * 20.000 Haematology 30.000 Radiology 50.000 Cardiology	1	14	1	2	Jul 13, 2005	0	70.83	0	Outstanding Invitations: 2 Agreed: 18 Declined: 1 Un-invited: 9 Terminated: 1 Total Invitations: 31
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	John EB Goode (Referee)	No		0	3	1	1	Jul 10, 2003	0	-	0	Outstanding Invitations: 1 Agreed: 5 Declined: 0 Un-invited: 5 Terminated: 1 Total Invitations: 12

Linking Submissions

This new feature is designed to provide Editors with a method of linking submissions together for general reference (those that are related by Author or topic) or to group Letters to the Editor together to take advantage of special functionality. 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. New linked submission icons  are displayed next to linked submissions in Editor folders, providing immediate visibility to the fact that the submission is in a 'Linked Submission Group'.

At any point in the editorial process, the Editor may identify submissions that are related to each other by topic, Author, or some other criteria, and decide to link them together as part of a Linked Submission Group ("Group"). To get started by creating a new group, the Editor (with 'Create/Edit Linked Submission Groups' RoleManager permission) clicks the [Linked Submissions](#) action link on the relevant submission from any Editor folder.

All Submissions with Editor's Decision - Managing Editor

Contents: All submissions for which an Editor has submitted a decision.

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

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Name	Editor Decision
View Submission Details History File Inventory Edit Submission Solicit Commentary Assign Editor Notify Author View Reviews and Comments Similar Articles in MEDLINE Send E-mail Linked Submissions	ADAM-2R2	Original Study	Where's my clamp? - Every Surgeon's Nightmare.	Adam Powers, MD	Sep 3, 2006	Aug 17, 2006	Accept	Arthur Contos, MD	Accept

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

[Editor Main Menu](#)

You should use the free Adobe Acrobat Reader 6 or later for best PDF Viewing results.



The user is taken to the *Add to/Create Linked Submission Group* page, where he can click the 'Create a New Group' button to set up a new Group.

Add to/Create Linked Submission Group

A submission may be added to an existing Linked Submission Group, or added as the first submission in a newly created Linked Submission Group.

To add the submission to an existing Linked Submission Group:

Please select a Linked Submission Group from the drop-down below and click the 'Add to Group' button.
Note: A submission can only belong to one Letter to the Editor Group.

Please Select a Linked Submission Group:

To create a new Linked Submission Group:

Click the 'Create a New Group' button to create a new Linked Submission Group that you can add your referring submission to.

Once created, the new Linked Submission Group will be selected by default in the drop-down menu above. Clicking the 'Add to Group' button will then add the referring submission to the newly created group.

Assign Publish With ID:

Click the 'Assign Publish With ID' button to assign a Publish With ID to your referring submission.

The user enters the 'Linked Submission Group Name' and selects the 'Linked Submission Group Type' to create the Group; either 'Linked With' for general linking, or 'Letter to the Editor' to take advantage of special 'Letter to the Editor' functionality.

NOTE: Once the Group has been created, it is available for selection in the drop-down list on the *Add to/Create Linked Submission Group* page. Additional submissions can be added to the group at any time.

NOTE: The 'Assign Publish With ID' is a separate feature discussed in the *Publishing Submissions Together* section of this document.

Create a New Linked Submission Group

To create a new Linked Submission Group

Please enter a Linked Submission Group Name (limit of 100 characters) and select a Linked Submission Group Type.

Linked With Group: A general group suitable for linking submission together for a wide variety of uses (e.g., submissions by the same Author or submissions based on a similar topic.)

Letter to the Editor Group: A 'speciality' group where Invited Authors may be provided PDF access to other linked submissions that belong to the group when they are solicited for a commentary. *Note: A submission can only belong to one Letter to the Editor Group.*

Once the new Linked Submission Group has been created, it is selected in the 'Add submission to a group' drop-down on the 'Add to Group' page. Clicking the 'Add to Group' button on the 'Add submission to a group' page will then add the submission to the newly created group.

Enter a Group Name

Linked Submission Group Name:	Insert Special Character <input type="text" value="Submissions related to Heartburn"/> <small>Maximum Linked Submission Group Name is 100 characters.</small>
Linked Submission Group Type:	<input checked="" type="radio"/> Linked With <input type="radio"/> Letter to the Editor

Select a Group type

Cancel

Submit

Submit the Group

Once you have created your Group, you can select it in the 'Add submission to a group' drop-down, and click the 'Add to Group' button to add your submission to the group.

Add to/Create Linked Submission Group

A submission may be added to an existing Linked Submission Group, or added as the first submission in a newly created Linked Submission Group.

To add the submission to an existing Linked Submission Group

Please select a Linked Submission Group from the drop-down below and click the 'Add to Group' button. *Note: A submission can only belong to one Letter to the Editor Group.*

Submissions related to Heartburn

To create a new Linked Submission Group

Once created, the new Linked Submission Group will be selected by default in the drop-down menu above. Clicking the 'Add to Group' button will then add the referring submission to the newly created group.

Assign Publish With ID

Click the 'Assign Publish With ID' button to assign a Publish With ID to your referring submission.

New group displays in the drop-down

Click to add the submission to the newly created group.

Once a submission has been added to a Group, it displayed on the *Linked Submissions* page, and a Linked Submissions icon is displayed in search results and system folders.

Linked Submissions page:

Linked Submissions for Manuscript "Heartburn and You."

Contents: Submissions that are linked to "Heartburn and You.". Linked With Groups are listed below. To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group

[Return to New Submissions](#) [Editor Main Menu](#) [Assign Publish With ID](#)

Linked Submission Group		
Action	Linked Submission Group Name	Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Submissions related to Heartburn	Active

Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Remove from Group		Original Study	Heartburn and You.	Lisa Turtle	06-10-2008		06-10-2008	Manuscript Submitted		<input type="checkbox"/> Publish With

Linked Submission Group information

Submission has been added as the first in the group

Linked Submissions icon in search results:

Search Submissions - Search Results

Linked Submission Group Name is containing 'ed'

Page: 1 of 1 (4 total submissions)

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	IP
View Submission View QC Results Details History File Inventory Edit Submission Solicit Commentary Classifications View Reviews and Comments Assign Editor Unassign Editor Notify Editor Invite Reviewers Set Final Disposition Google Scholar Title Search HighWire Title Interscience Title Search Submit Editor's Decision and Comments Send E-mail Linked Submissions	DEMO-D-05-00021R1		Anthony Author	GASTRO TEST SUBMISSION	Original Research		Key; Words;	Another antibiotics Antivirals Steroids	Received by Editor	2008-01-23 08:38:08 20	

On the *Linked Submissions* page, Editors with permission to 'Create/Edit Linked Submission Groups' can click the [Add Submission](#) link associated with a group to use a new Search Submissions feature to look up submissions to add them to the group.

Three new search criteria are available in addition to the existing criteria:

1. Linked Submission Group Name
2. Publish With ID

3. Publish With ID Description

Search submissions selection criteria

You may refine your criteria further on the [Advanced Criteria](#)

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

Criterion	Is/Is not	Selector	Value		
Linked Submission Group Name	is	Containing	<input type="text"/>	Or	Remove
Publish With ID	is	Containing	<input type="text"/>	Or	Remove
Publish With ID Description	is	Containing	<input type="text"/>		Remove

[Add](#)

Select from new or existing criteria

Enter search value

Click 'Search'

- Use the [Value Options](#) link to view standard lists and classifications you can copy and paste Values from there.
- The required format for date entry is mm/dd/yyyy. If the date is not entered in this format, you will be required to re-enter the date in the specified format.
- You must enter at least one set of criteria in the Value box to execute the search. The more refined the criteria, the quicker your results will be.
- If you combine AND and OR relations, use the parentheses to ensure the AND relationship is evaluated first. Do not use parentheses, or combine AND and OR within parentheses, the AND relationship is evaluated first.
- Selections are case-insensitive. You may enter any mixed case value.
- You can check for empty (no value) fields by selecting the "Unspecified" Selector.

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

A checkbox is displayed for each submission returned in the results. The Editor selects the submissions they wish to add to the group, and clicks the 'Add to Group' button.

NOTE: The 'Select' checkbox is suppressed for submissions that already belong to the Group.

Search Submissions - Search Results

Article Title is containing 'related causes of Heartburn'

[Search Again](#)

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

Select	Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted	Reviewers	Handling Editor	Assigned Editors	Section/Cate
<input type="checkbox"/>	View Submission details	JINGLETST51-D-08-00008		Adam Powers	Excessive burrito consumption and related causes of Heartburn.	Original Study		Key; Words;	104: Respiratory System 104.76: Respiratory Mucosa 104.329: Larvnx	With Editor	Jun 4 2008 8:46AM	Jun 4 2008 8:45AM		Sean Quincy	Sean Quincy	

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

Cancel
Add to Group

Add it to the group

The Editor is taken back to the *Linked Submissions* page, where the selected submission(s) are added to the group.

Linked Submissions for Manuscript "Heartburn and You."

Contents: Submissions that are linked to Heartburn and You. Linked With Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

This is the 'Linked With' group

The selected submission has been added to the newly created group

Action	Linked Submission Group Name	Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Submissions related to Heartburn	

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Remove from Group		Original Study	Heartburn and You.	Lisa Turtle	06-10-2008		06-10-2008	Manuscript Submitted		<input type="checkbox"/> Publish With
View Submission Remove from Group	JINGLETST61-D-08-00008	Original Study	Excessive burrito consumption and related causes of Heartburn.	Adam Powers	06-04-2008		06-04-2008	With Editor		<input type="checkbox"/> Publish With

[Return to New Submissions](#)
[Editor Main Menu](#)

On the *Linked Submissions* page, Editors with permission to 'Create/Edit Linked Submission Groups' can perform the following actions. For simplification purposes, partial screenshots are shown.

1. Create a new Group that contains the submission from which they got to this page (the 'referring' submission). After creating the new Group, the user is returned to the *Linked Submissions* page and the newly created Group is selected by default.

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

Create a New Group

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group **Add to Group**

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

Assign Publish With ID

2. Add the referring submission to an existing group by selecting a Group from a drop-down selector near the top of the page.

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

Create a New Group

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group **Add to Group**

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

Assign Publish With ID

3. Search for other submissions to add to an existing group by clicking the Add Submission link (as described above).

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

[Create a New Group](#)

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group [Add to Group](#)

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#) [Assign Publish With ID](#)

Linked With:

Action	Linked Submission Group Name	Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Osteoporosis submissions - 2007	Active

4. Modify an existing Group (e.g. Group Name, Group Type, or remove submissions from the Group) by clicking the Edit Linked Group action link.

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

[Create a New Group](#)

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group [Add to Group](#)

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#) [Assign Publish With ID](#)

Linked With:

Action	Linked Submission Group Name	Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Osteoporosis submissions - 2007	Active

5. Remove all Linked Submissions from a Group at once by clicking the Clear Group link. When this link is clicked, a warning is displayed so the user can confirm his intent to remove all submissions from the Group.

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

Linked With:

Linked Submission Group											
Action ▲	Linked Submission Group Name										Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Osteoporosis submissions - 2007										Active

Linked Submissions

Manuscript	Article	Article	Author	Initial Date	Section/	Status	Current	Publish With	Publish
------------	---------	---------	--------	--------------	----------	--------	---------	--------------	---------



- Users with permission to 'Set Active/Inactive Status for Linked Submission Groups' may 'Activate' any inactive Group by clicking the Set Active Status link, or 'Inactivate' any active Group by clicking the Set Inactive Status link. When either of these links are clicked, a warning is displayed so the user can confirm his intent to activate/inactivate the Group.
 - When a Group is made 'active', submissions can be added to the Group.
 - When a Group is made 'inactive', submissions can no longer be added to the Group.

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

Linked With:

Linked Submission Group											
Action ▲	Linked Submission Group Name										Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Osteoporosis submissions - 2007										Active

Linked Submissions

Manuscript	Article	Article	Author	Initial Date	Section/	Status	Current	Publish With	Publish
------------	---------	---------	--------	--------------	----------	--------	---------	--------------	---------



- Remove an individual submission from a Group by clicking the Remove from Group link. When this link is clicked, a warning is displayed so the user can confirm his intent to remove the submission from the Group.

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

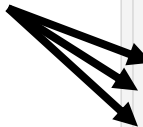
Please select a Linked Submission Group

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

Linked With:

Linked Submission Group										
Action	Linked Submission Group Name									Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Osteoporosis submissions - 2007									Active
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Go to Submission Remove from Group	JOURNAL-73	Original Study	Modern Osteoporosis Drugs.	R. Blackmore, MD	Jan 3, 2007		Feb 6, 2007	Completed - Accept		<input type="checkbox"/> Publish With
View Submission Remove from Group	JOURNAL-76	Original Study	Osteoporosis in the Modern Era	G. Butler, MD	Jan 16, 2007		Feb 7, 2007	Completed - Accept		<input type="checkbox"/> Publish With
View Submission Remove from Group	JOURNAL-82	Original Study	Bone and Joint Disease	K.K. Downing, MD	Jan 18, 2007		Feb 9, 2007	Under Review		<input type="checkbox"/> Publish With



8. Assign a PWID by clicking the 'Publish With ID' button.

- NOTE: The 'Assign Publish With ID' is a separate feature discussed in the *Publishing Submissions Together* section of this document.

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

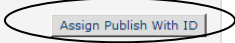
Please select a Linked Submission Group

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

Linked With:

Linked Submission Group										
Action	Linked Submission Group Name									Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Osteoporosis submissions - 2007									Active



Search Submissions - Search Results

Manuscript Number CONTAINS '30'

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

Submit	Action	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted	Reviewers	Handling Editor	Assigned Editors	Section/Category
<input type="checkbox"/>	View Submission Details	JOURNAL-30	Tom Jones	Clinical Advances in Vascular Surgery.	Invited Commentary		Key: Words;	20.700 Surgery	Accept	08/11/2006	05/14/2004	Rhonda Reviewer, MD	Richard Daves	Carol Chandler, MD Dan Dawson, MD	

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

[Editor Main Menu](#)

Editors with ‘view only’ access to Linked Submission Groups (i.e. ‘View Linked Submission Groups’ permission is enabled but ‘Create/Edit Linked Submission Groups’ is not enabled) see a version of the *Linked Submissions* page where they can view information about the linked Groups, but cannot edit the Group in any way.

Linked Submissions for Manuscript Number JOURNAL-22.

Contents: Submissions that are linked to JOURNAL-22. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

Linked With:


Linked Submission Group										
Linked Submission Group Name										Linked Submission Group Status
Vascular Surgery submissions for August 2006										Active
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Go to Submission	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Accept	Vascular Surgery submissions for August 2006	PWID-00000001
View Submission Go to Submission	JOURNAL-31	Original Study	Vascular Surgery and You.	Sean Bean, MD	Aug 14, 2006		Sep 3, 2006	Under Review	Vascular Surgery submissions for August 2006	PWID-00000001
Linked Submission Group										
Linked Submission Group Name										Linked Submission Group Status
Vascular Surgery submissions by Author Sean Bean, MD										Active
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Go to Submission	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Accept	Vascular Surgery submissions for August 2006	PWID-00000001
View Submission Go to Submission	JOURNAL-31	Original Study	Vascular Surgery and You.	Sean Bean, MD	Aug 14, 2006		Sep 3, 2006	Under Review	Vascular Surgery submissions for August 2006	PWID-00000001

Letter to the Editor Linked With:

Linked Submission Group										
Linked Submission Group Name										Linked Submission Group Status
Vascular Surgery - Letter to the Editor and related submissions										Active
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Go to Submission	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Accept	Vascular Surgery submissions for August 2006	PWID-00000001
View Submission Go to Submission	JOURNAL-35	Reply	Vascular Surgery - a decade of innovation - A Reply.	Sam Elliot, MD	Aug 11, 2006		Sep 20, 2006	Accept		
View Submission Go to Submission	JOURNAL-38	Letter to the Editor	Vascular Surgery - a decade of innovation.	James Edwards, MD	Aug 8, 2006		Sep 4, 2006	Accept		

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

You should use the free Adobe Acrobat Reader 6 or later for best PDF Viewing results.



Editor Roles with permission to ‘View Linked Submission Groups’ will see a new ‘Linked Submission Groups’ section on the *Editorial Menu*.

Managing Editor Main Menu

Search

[Search Submissions](#) | [Search People](#)

Editor 'To-Do' List

My Pending Assignments (40)
[New Submissions](#) (11)
Revised Submissions (0)
New Submissions Requiring Assignments (0)
Revised Submissions Requiring Assignments (0)
[Submissions Sent Back to Author for Approval](#) (26)
[Incomplete Submissions](#) (3)
New Assignments (0)
Submissions with Required Reviews Complete (0)
Submissions Requiring Additional Reviewers (0)
Submissions with One or More Late Reviews (0)
Reviews in Progress (0)
Reviewers Invited - No Response (0)
Submissions Under Review (0)

View All Assigned

[View All Assigned Submissions](#) (140)
[View All Assigned Submissions being Edited](#) (17)

Subordinate Editor's Pending Assignments (138)

[Group by Editors I Assigned](#)
[Group by Editor with Current Responsibility](#)
[Group by Manuscript Status](#)

Submissions with Decisions

[Submissions out for Revision](#) (120)
[All Submissions with Editor's Decision](#) (19)
[All Submissions with Final Disposition:](#)
[Accept](#) (1446), [Reject](#) (2504), [Withdrawn](#) (153)
[Completed Conference Submissions](#) (1) |
[Withdrawn Conference Submissions](#) (1)
My Assignments with Decision (0)
[My Assignments with Final Disposition](#) (6)

Linked Submission Groups

[Active Linked Submission Groups](#)
[Inactive Linked Submission Groups](#)

Administrative Functions

[System Administrator Functions](#)
[Register New User](#)
[Reports](#)
[Send Reminder Letters](#)
[Send Batch E-mail](#)

Clicking the [Active Linked Submission Groups](#) action link on the *Editorial Menu* takes the user to the new *Active Linked Submission Groups* page. Note that the links displayed in the Action column are dependent on RoleManager permissions.

Active Linked Submission Groups		
Page: 1 of 1 (5 total Linked Submission Groups)		Display results per page.
Action ▲	Linked Submission Group Name ▲▼	Linked Submission Group Type ▲▼
Edit and View Linked Group Set Inactive Status	Vascular Surgery Submissions for June 2007 issue	Linked With
Edit and View Linked Group Set Inactive Status	July 2007 issue	Linked With
Edit and View Linked Group Set Inactive Status	Novik MS; Letter to Editor and related commentaries	Letter to the Editor
Edit and View Linked Group Set Inactive Status	Surgery - General Research MS for Aug 2007 issue	Linked With
Edit and View Linked Group Set Inactive Status	August 2007 Issue	Linked With
Page: 1 of 1 (5 total Linked Submission Groups)		Display results per page.

[Inactive Linked Submission Groups](#)

[Editor Main Menu](#)

Clicking the [Inactive Linked Submission Groups](#) action link on the *Editorial Menu* takes the user to the new *Inactive Linked Submission Groups* page. Note that the links displayed in the Action column are dependent on RoleManager permissions.

Inactive Linked Submission Groups		
Page: 1 of 1 (5 total Linked Submission Groups)		Display results per page.
Action ▲	Linked Submission Group Name ▲▼	Linked Submission Group Type ▲▼
View Linked Group Set Active Status	Surgery Submissions for Nov 2006 issue	Linked With
View Linked Group Set Active Status	Dec 2006 issue	Linked With
View Linked Group Set Active Status	Clarke MS; Letter to Editor and related commentaries	Letter to the Editor
Page: 1 of 1 (5 total Linked Submission Groups)		Display results per page.

[Active Linked Submission Groups](#)

[Editor Main Menu](#)

Publisher Roles can be given ‘view only’ access to Linked Submission Groups. When the RoleManager permission ‘View Linked Submission Groups’ is enabled, the user sees a new ‘Linked Submission Groups’ section on the *Publisher Main Menu* (just like the *Editorial Menu*), with two new folders: [Active Linked Submission Groups](#) and [Inactive Linked Submission Groups](#).

Publisher Main Menu

Accepted Submissions
[Accepted Submissions \(227\)](#)

Linked Submission Groups
[Active Linked Submission Groups](#)
[Inactive Linked Submission Groups](#)

Conference Submissions
[Search/Manage Conference Submissions](#)

Publisher 'To-Do' List
[Incomplete Submissions \(2\)](#)

Manage WebFirst Inventory
[WebFirst Inventory \(8\)](#)
[WebFirst PDFs Needing Approval \(1\)](#)
[WebFirst Summary Report](#)
[WebFirst Detail Report](#)

Clicking the [Active Linked Submission Groups](#) link on the Publisher Main Menu navigates the user to the *Active Linked Submission Groups* page.

- NOTE: This is the same version of the page that Editors with 'view only' permission would see.

Active Linked Submission Groups

Page: 1 of 1 (5 total Linked Submission Groups) Display results per page.

Action ▲	Linked Submission Group Name ▲	Linked Submission Group type ▲
View Linked Group	Vascular Surgery Submissions for June 2007 issue	Linked With
View Linked Group	July 2007 issue	Linked With
View Linked Group	Novik MS; Letter to Editor and related commentaries	Letter to the Editor
View Linked Group	Surgery - General Research MS for Aug 2007 issue	Linked With
View Linked Group	August 2007 Issue	Linked With

Page: 1 of 1 (5 total Linked Submission Groups) Display results per page.

[Inactive Linked Submission Groups](#)
[Publisher Main Menu](#)

Clicking the [Inactive Linked Submission Groups](#) link on the Publisher Main Menu navigates the user to the *Inactive Linked Submission Groups* page.

- NOTE: This is the same version of the page that Editors with 'view only' permission would see.

Inactive Linked Submission Groups

Page: 1 of 1 (5 total Linked Submission Groups) Display results per page.

Action ▲	Linked Submission Group Name ▲	Linked Submission Group type ▲
View Linked Group	Surgery Submissions for Nov 2006 issue	Linked With
View Linked Group	Dec 2006 issue	Linked With
View Linked Group	Clarke MS; Letter to Editor and related commentaries	Letter to the Editor

Page: 1 of 1 (5 total Linked Submission Groups) Display results per page.

[Active Linked Submission Groups](#)
[Publisher Main Menu](#)

Publisher Roles also see the [Linked Submissions](#) action link and linking icons in the

Accepted Submissions folder.

Accepted Submissions

Listed below are any submissions with an Accepted Final Disposition. They may be sorted by clicking the arrows under the column headings.

Page: 1 Display 25 results per page.

Action ▲	Digital Object Identifier ▲▼	Manuscript Number ▲▼	Author Name ▲▼	Article Title ▲▼	Article Type ▲▼	Volume Number ▲▼	Issue Number ▲▼	Date of Final Disposition ▲▼	Final Disposition ▲▼	WebFirst Status ▲▼	WebFirst Status Date ▲▼
View Submission Production Details Transmittal Form Publish Information Edit Submission Download Source Files Download Metadata Create WebFirst PDF Similar Articles in MEDLINE Linked Submissions		JOURNAL-35	Sam Elliot, MD	Vascular Surgery for Beginners - a Reply.	Reply			Aug 16, 2006	Accept	Inactive No PDF	
View Submission Production Details Transmittal Form Publish Information Edit Submission Download Source Files Download Metadata Create WebFirst PDF Similar Articles in MEDLINE Linked Submissions		JOURNAL-22	Sean Bean, MD	Vascular Surgery for Beginners.	Original Study			Aug 11, 2006	Accept	Inactive No PDF	

Page: 1 Display 25 results per page.

[Publisher Main Menu](#)

You should use the free Adobe Acrobat Reader 6 or later for best PDF Viewing results.



Clicking the [Linked Submissions](#) action link takes the Publisher to the *Publisher Linked Submissions* page where all Groups that the submission belongs to are displayed.

- NOTE: This page is similar to the page that Editors with ‘view only’ permission would see, except for some of the action links.

Linked Submissions for Manuscript Number JOURNAL-22.

Contents: Submissions that are linked to JOURNAL-22. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

[Return to \[Referring Page\]](#)
[Publisher Main Menu](#)

Linked With:

Linked Submission Group										
Linked Submission Group Name										Linked Submission Group Status
Vascular Surgery submissions for August 2006										Active
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Production Details	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Completed - Accept	Vascular Surgery submissions for August 2006	PWID-00000001
View Submission Production Details	JOURNAL-31	Original Study	Vascular Surgery and You.	Sean Bean, MD	Aug 14, 2006		Sep 3, 2006	Completed - Accept	Vascular Surgery submissions for August 2006	PWID-00000001
Linked Submission Group										
Linked Submission Group Name										Linked Submission Group Status
Vascular Surgery submissions by Author Sean Bean, MD										Active
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Production Details	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Completed - Accept	Vascular Surgery submissions for August 2006	PWID-00000001
View Submission Production Details	JOURNAL-33	Original Study	New Frontiers in Vascular Surgery.	Sean Bean, MD	Aug 15, 2006		Sep 4, 2006	Under Review		

Letter to the Editor Linked With:

Linked Submission Group										
Linked Submission Group Name										Linked Submission Group Status
Vascular Surgery - Letter to the Editor and related submissions										Active
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Production Details	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Completed - Accept	Vascular Surgery submissions for August 2006	PWID-00000001
View Submission Production Details	JOURNAL-35	Reply	Vascular Surgery - a decade of innovation - A Reply.	Sam Elliot, MD	Aug 11, 2006		Sep 20, 2006	Completed - Accept		
View Submission Production Details	JOURNAL-38	Letter to the Editor	Vascular Surgery - a decade of innovation.	James Edwards, MD	Aug 8, 2006		Sep 4, 2006	Completed - Accept		

[Return to \[Referring Page\]](#)
[Publisher Main Menu](#)

You should use the free Adobe Acrobat Reader 6 or later for best PDF Viewing results.




TO CONFIGURE:

A new 'Linked Submission Policies' heading is displayed on the *PolicyManager Main Menu*, with a new action link Configure Linked Submission Group Name Preferences.

PolicyManager Main Menu

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

- ☐ Registration and Login Policies
- ☐ Status Policies
- ☐ Submission Policies
- ☐ Additional Data Policies
- ☐ Editor Assignment Policies
- ☐ Reviewer and Editor Form Policies
- ☐ E-mail and Letter Policies
- ☐ General Policies
- ☐ Linked Submissions Policies
 - [Configure Linked Submission Group Name Preferences](#)
 - [Configure Publish With ID Preferences](#)
 - [Configure Publish With ID Description Preferences](#)
- ☐ Conference Submission Policies
- ☐ Transmittal Policies
- ☐  Preprint Manager

On the *Configure Linked Submission Group Name Preferences* page, the Administrator enters the number of characters that the Linked Submission Group Name will be limited to when an Editor creates a new Linked Submission Group (maximum 1000).

Configure Linked Submission Group Name Preferences

Please enter a field length for the Linked Submission Group Name value. The character length of Linked Submission Group Names is limited to the value entered.

Field Length: (Maximum Field Length of 1000)

The next step is to go to Editor RoleManager and enable the appropriate permissions for Editors to link submissions together. There are three new permissions related to linked submissions.

1. ‘View Linked Submission Groups’ – This is the “base” permission that allows an Editor to see the Linked Submissions section on the *Editorial Menu*, as well as the Linked Submissions action link and linked submission icons once a submission has been linked into a Group.
2. ‘Create/Edit Linked Submission Groups’ – This permission works in conjunction with the ‘View Linked Submission Groups’ permission. If enabled, the Editor can create a new Linked Submission Group, as well as edit an existing one.
3. ‘Set Active/Inactive Status for Linked Submission Groups’ - This permission works in conjunction with the ‘Create/Edit Linked Submission Groups’ permission. If enabled, the Editor 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:

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

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

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- System Conversion Tasks
- General Searching and Viewing
 - Use Editorial Details Layout
 - Search All Manuscripts
 - Search Only Assigned Manuscripts
 - View Linked Submission Groups
 - Create/Edit Linked Submission Groups
 - Set Active/Inactive Status on Linked Submission Groups


If you want Publisher Roles to be able to see Linked Submissions, enable the new Publisher RoleManager permission 'View Linked Submission Groups'. If enabled, the Publisher can see the Linked Submissions section on the *Publisher Main Menu*, as well as the Linked Submissions action link and linked submission icons in his *Accepted Submissions* folder once a submission has been linked into a Group and had a Final Disposition of 'Accept' set on it.

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

- System Conversion Tasks
- General Searching and Viewing
 - View Submission
 - View Manuscript Details
 - Use Editorial Details Layout
 - 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
 - View All Accepted Submissions
 - View Linked Submission Groups
 - Download Metadata

Publishing Submissions Together

EM now supports the ability to assign a special ID to submissions that should be published together. This is an extension of the new Linked Submissions feature described previously in this document.

Submissions in a Linked Submission Group (“Group”) can also be assigned to a Publish With ID (“PWID”). This supplemental grouping mechanism indicates that all linked submissions assigned to the same PWID should be published together. The PWID is assigned to a submission either automatically by the system or manually by the Editor (configurable in PolicyManager). A special icon  is displayed next to submissions assigned to a PWID in Editor folders, providing immediate visibility to the fact that a ‘Publish With ID’ has been assigned to the submission. Hovering over this icon displays the text “Publish With ID Assigned”. Linked Submissions with the same PWID can be displayed on the transmittal form and can be included as part of the metadata released to production.

Editors with permission to ‘Create/Edit Linked Submission Groups’ can assign a PWID to a linked submission on the *Add to/Create Linked Submission Group* page.

Add to/Create Linked Submission Group

A submission may be added to an existing Linked Submission Group, or added as the first submission in a newly created Linked Submission Group.

To add the submission to an existing Linked Submission Group:

Please select a Linked Submission Group from the drop-down below and click the ‘Add to Group’ button.
Note: A submission can only belong to one Letter to the Editor Group.

Please Select a Linked Submission Group:

To create a new Linked Submission Group:

Click the ‘Create a New Group’ button to create a new Linked Submission Group that you can add your referring submission to.

Once created, the new Linked Submission Group will be selected by default in the drop-down menu above. Clicking the ‘Add to Group’ button will then add the referring submission to the newly created group.

Assign Publish With ID:

Click the ‘Assign Publish With ID’ button to assign a Publish With ID to your referring submission.

Editors with this permission can also assign a PWID to linked submissions on the *Linked Submissions* pages. This is achieved by selecting the ‘Publish With’ checkbox for each submission you want to assign a PWID and clicking the ‘Assign Publish With ID’ button.

Linked Submissions for Manuscript Number JOURNAL-73.

Contents: Submissions that are linked to JOURNAL-73. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

[Create a New Group](#)

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group [Add to Group](#)

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

[Assign Publish With ID](#)

Linked With:

Linked Submission Group										
Action	Linked Submission Group Name								Linked Submission Group Status	
Add Submission Edit Linked Group Set Inactive Status Clear Group	Osteoporosis submissions - 2007								Active	
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Go to Submission Remove from Group	JOURNAL-73	Original Study	Modern Osteoporosis Drugs.	R. Blackmore, MD	Jan 3, 2007		Feb 6, 2007	Completed - Accept		<input type="checkbox"/> Publish With
View Submission Go to Submission Remove from Group	JOURNAL-76	Original Study	Osteoporosis in the Modern Era	G. Butler, MD	Jan 16, 2007		Feb 7, 2007	Completed - Accept		<input type="checkbox"/> Publish With
View Submission Go to Submission Remove from Group	JOURNAL-82	Original Study	Bone and Joint Disease	K.K. Downing, MD	Jan 18, 2007		Feb 9, 2007	Under Review		<input type="checkbox"/> Publish With

Additional PWID Details:

1. An Assign ID link is displayed for submissions that are part of the group, but were not checked off when the 'Assign Publish With ID' button was used to generate the PWID.
2. If a submission is added to a Group after the PWID has been generated for the group, an Assign ID link is displayed in the 'Publish With ID' column to facilitate assigning the PWID associated with the Group to the submission.
3. A submission may belong to multiple Linked Submission Groups, but can only be assigned one PWID. Once a PWID has been assigned to a submission that is part of multiple Groups, the PWID associated with the submission is displayed in the 'Publish With ID' column of all the groups the submission is a part of and the 'Publish With' checkbox is not displayed. This prevents an Editor from attempting to assign a PWID to a submission that already has one as part of another group.
4. If a PWID has been created for the referring submission as part of one of the Groups displayed on the *Linked Submissions* page, the 'Publish With' checkboxes for submissions belonging to other groups on the page are suppressed, and an Assign ID link is displayed for them.
5. Each submission that has a PWID assigned to it displays a Remove ID link in the 'Publish With ID' column that facilitates removing the PWID from the submission if necessary.
6. If the PWID is removed from a submission, an Assign ID link is displayed in the 'Publish With ID' column to facilitate assigning the PWID associated with the group to the submission.
7. If the PWID is removed from all submissions that are part of a Linked Submission Group, the PWID cannot be reused by journals using the 'Automatic' Publish With ID numbering format. A journal using the 'Manual' Publish With ID

numbering format could assign that PWID to another group of linked submissions if desired.

Example 1: *Linked Submissions* page display; with submissions linked in each group type, and a Publish With ID assigned – Note JOURNAL-41, which is part of the group, but was not selected as a submission to be assigned the Publish With ID, and JOURNAL-44 which was added to the group after a Publish With ID had already been assigned. The ‘Create/Edit Linked Submission Groups’ and ‘Set Active/Inactive Status for Linked Submission Groups’ RoleManager permissions are enabled for the Editor: (Note: The Assign Publish With ID button is not displayed, because the referring submission currently has a Publish With ID assigned to it).

Linked Submissions for Manuscript Number JOURNAL-22.

Contents: Submissions that are linked to JOURNAL-22. Linked With Groups are listed first, with Letter to the Editor Groups listed second. Linked Submissions that are part of each group may be sorted.

To create a new Linked Submission Group containing this submission, please click the 'Create a New Group' button.

[Create a New Group](#)

To add this submission to an existing Linked Submission Group, please select a group from the drop-down below and click the 'Add to Group' button.

Please select a Linked Submission Group [Add to Group](#)

A Publish With ID can be assigned to the referring submission and any number of linked submissions by selecting the *Publish With* option and clicking the *Assign Publish With ID* button. The *Assign Publish With ID* button is no longer displayed once a Publish With ID has been assigned to the referring submission.

[Return to Search Results](#)
[Return to Referring Page](#)
[Editor Main Menu](#)

Linked With:

Linked Submission Group		Linked Submissions										
Action	Linked Submission Group Name	Linked Submission Group Status										
Add Submission Edit Linked Group Set Inactive Status Clear Group	Vascular Surgery submissions for August 2006	Active										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID		
View Submission Go to Submission Remove from Group	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Accept	Vascular Surgery submissions for August 2006	PWID-00000001 Remove ID		
View Submission Go to Submission Remove from Group	JOURNAL-31	Original Study	Vascular Surgery and You.	Sean Bean, MD	Aug 14, 2006		Sep 3, 2006	Accept	Vascular Surgery submissions for August 2006	PWID-00000001 Remove ID		
View Submission Go to Submission Remove from Group	JOURNAL-41	Original Study	Advances in Vascular Surgery for 2007.	Peter Daniels, MD	Aug 15, 2006		Sep 7, 2006	Decision in Process		Assign ID		
View Submission Go to Submission Remove from Group	JOURNAL-44	Original Study	A New Era for Vascular Surgery.	Mark Lenard, MD	Aug 16, 2006		Sep 9, 2006	Decision in Process		Assign ID		
Linked Submission Group		Linked Submissions										
Action	Linked Submission Group Name	Linked Submission Group Status										
Add Submission Edit Linked Group Set Inactive Status Clear Group	Vascular Surgery submissions - Topical Research	Active										

Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Go to Submission Remove from Group	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Accept	Vascular Surgery submissions for August 2006	PWID-00000001 Remove ID
View Submission Go to Submission Remove from Group	JOURNAL-47	Original Study	Vascular Surgery in the Modern Age.	Ann B. Dextrous, MD	Sep 14, 2006		Sep 3, 2006	Under Review		Assign ID

Letter to the Editor Linked With:

Linked Submission Group										
Action	Linked Submission Group Name								Linked Submission Group Status	
Add Submission Edit Linked Group Set Inactive Status Clear Group	Vascular Surgery - Letter to the Editor and related submissions								Active	

Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Go to Submission Remove from Group	JOURNAL-22	Original Study	Vascular Surgery for Beginners.	Sean Bean, MD	Aug 11, 2006		Sep 4, 2006	Accept	Vascular Surgery submissions for August 2006	PWID-00000001 Remove ID
View Submission Go to Submission Remove from Group	JOURNAL-38	Reply	Vascular Surgery - a decade of innovation - A Reply.	Sam Elliot, MD	Aug 18, 2006		Sep 20, 2006	Accept		Assign ID
View Submission Go to Submission Remove from Group	JOURNAL-35	Letter to the Editor	Vascular Surgery - a decade of innovation.	James Edwards, MD	Aug 15, 2006		Sep 4, 2006	Accept		Assign ID

[Return to Search Results](#)
[Return to \[Referring Page\]](#)
[Editor Main Menu](#)

You should use the free Adobe Acrobat Reader 6 or later for best PDF Viewing results.



Once a submission is in a Group, the Editor can assign a PWID by selecting the ‘Publish With’ checkbox for the referring submission and any number of other linked submissions on the *Linked Submissions* page. The target page varies, depending on whether the publication is configured for ‘manual’ or ‘automatic’ PWID assignment in PolicyManager.

If PWID is assigned **manually**, the Editor is taken to the *Assign With Publish ID* page where he can enter the PWID and PWID Description.

Assign Publish With ID

A Publish With ID may contain any mix of letters and numbers (100 characters max).

The Publish With ID Description may contain any mix of letters and numbers ([x] characters max) and is used to label linked submissions that share this Publish With ID for the Publisher.

Publish With ID	Publish With ID Description

NOTE: The ‘Publish With ID Description’ must be within the character limit configured on the *Configure Publish With ID Description Preferences* page in PolicyManager.

The Editor may also modify a PWID and/or PWID Description that has already been assigned, by clicking the text link displayed for the PWID of the referring submission on the *Linked Submissions* page.

Assign Publish With ID

A Publish With ID may contain any mix of letters and numbers (100 characters max).

The Publish With ID Description may contain any mix of letters and numbers ([x] characters max) and is used to label linked submissions that share this Publish With ID for the Publisher.

<input type="button" value="Cancel"/> <input type="button" value="Submit"/>	
Publish With ID	Publish With ID Description
PWID-00000046	Surgery Submissions

If PWID is assigned **automatically**, the Editor is taken to the *Assign With Publish ID* page where he can see the PWID and enter the PWID Description. Note the PWID is assigned by the system and cannot be modified.

Enter Publish With ID Description

The Publish With ID Description may contain any mix of letters and numbers ([x] characters max) and is used to label linked submissions that share this Publish With ID for the Publisher.

<input type="button" value="Cancel"/> <input type="button" value="Submit"/>	
Publish With ID	Publish With ID Description
PWID-00000007	<input type="text"/>

The Editor may also modify a Publish With ID Description that has already been assigned, by clicking on the text link displayed for the Publish With ID Description of the referring submission on the *Linked Submissions* page.

Enter Publish With ID Description

The Publish With ID Description may contain any mix of letters and numbers ([x] characters max) and is used to label linked submissions that share this Publish With ID for the Publisher.

<input type="button" value="Cancel"/> <input type="button" value="Submit"/>	
Publish With ID	Publish With ID Description
PWID-00000019	Oct 2006 Submissions

Submissions that have had a Final Disposition of Reject set on them before a PWID has been assigned do not display the 'Publish With' checkbox in the 'Publish With ID column', and the 'Publish With' text is grayed out in the 'Publish With ID' column. So if a submission is intended to be published with others, the PWID should be generated for the linked submission *before* a Final Disposition is set on any of the linked submissions in the group.

Submissions that have a Final Disposition of Accept set on them *after* a PWID was assigned display a Remove ID link next to the PWID in the 'Publish With ID' column. When a Final Disposition of Accept is set on a submission that has a PWID, a 'Linked Submissions' section is displayed on the transmittal form, and the linked submission fields (Publish With ID and Publish With ID Description) are transmitted as part of the metadata to production.

Submissions accepted for publication (Final Disposition set to 'Accept') that have been assigned a PWID automatically display on the transmittal form.

Linked Submissions		
Publish With ID	Description	Publish With
PWID-0000001	Vascular Surger Submissions for August 2006	JOURNAL-22, JOURNAL-31

Please fill in all required fields on this transmittal form.

TO CONFIGURE:

Go to the new 'Linked Submission Policies' section in PolicyManager and click the Configure Publish With ID Preferences link. Then choose whether the Publish With ID (PWID) is assigned automatically by the system, or manually by the Editor. 'Manual' is selected by default.

Configure Publish With ID Preferences

Selecting the **Automatic** option allows a Publish With ID to be assigned to a Linked Submission by the system. This Publish With ID format consists of a prefix followed by numerals (18 characters max) that are automatically incremented for each new Publish With ID. The prefix is appended to the numeric value, and is not counted as part of the 18 character limit for the Publish With ID.

Selecting the **Manual** option allows an Editor to manually assign a Publish With ID (any mix of numbers and letters — 100 characters max) to a Linked Submission.

- Automatic** - System will assign the Publish With ID automatically
- Manual** - Editor will enter the Publish With ID manually

If you select the 'Automatic' option and click the 'Submit' button, you are taken directly to the *Set Automatic Publish With ID Format* page. On this page, you can enter a prefix (optional), starting number (required), and field length (also required) that is used by the system to automatically generate the PWID.

Leading zeros are accounted for with the ‘Display leading zeros in the Publish With ID number’ option. Selecting this checkbox ensures that leading zeroes are inserted in front of automatically generated PWIDs.

Set Automatic Publish With ID Number Format

Please enter Prefix, Starting Number, and Field Length. The starting number is incremented to create a unique Publish With ID each time a Publish With ID is assigned to a Linked Submission.

Prefix: **Starting Number:** **Field Length:**

Display leading zeros in the Publish With ID number.

The next step is to click the [Configure Publish With ID Description Preferences](#) link in the ‘Linked Submission Policies’ section of PolicyManager. On this page, you can enter the maximum limit for PWID Description entered by Editors.

Configure Publish With ID Description Preferences

Please enter a field length for the Publish With ID Description value. The character length of Publish With ID Description is limited to the value entered.

Field Length: (Maximum Field Length of 1000)

Letters to the Editor Functionality

EM now supports the management of Letters to the Editor, where unsolicited submissions are received in response to an already published paper. This is an extension of the new Linked Submissions feature described previously in this document.

Letters to the Editor linking includes specialized ‘rules’, further distinguishing it from ‘general’ (Linked With) submission linking:

1. When a commentary is solicited from one of the submissions linked together using the Letter to the Editor linking mechanism, it is possible for the Author of the commentary (the Author of the original published article) to submit a ‘response back’ paper that will become a member of the Group.
2. When an Invited Author submits a commentary where the invitation was generated from a submission belonging to a Letter to the Editor Group, his invited commentary is automatically added to the Letter to the Editor Group by the system, and is displayed accordingly on the *Linked Submissions* page. The ‘response back’ commentary (Reviewer PDF) can be made available to the Authors of selected submissions in the group when a decision is made on their Letter to the Editor.

Typical Letter to the Editor Scenario:

A submission is received, and eventually published. Letters to the Editor (solicited or unsolicited reactions to that submission) are received by the Editorial Office.

The Editorial Office wishes to link these ‘reactionary’ Letters to the Editor to the published submission and make them available to the Author of the published submission.

The screenshot shows a web interface titled "New Submissions Requiring Assignment - mary mary". Below the title is a table with the following data:

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Details History Technical Information File Inventory Edit Submission Send Back to Author Classifications Assign Editor Set Final Disposition Initiate Production Similar Articles in MEDLINE Search in Google.com Search in Pubmed Send Email Linked Submissions	JINGLETEST61-D-08-00020	Letter to the Editor	Letter to the Editor based on a controversial paper 2.	Jessie Cutchens	Jun 10 2008 2:13PM	Jun 10 2008 4:13PM	Manuscript Submitted

Two yellow text boxes with red borders provide context:

- The top box, with a red arrow pointing to the "Article Title" column, contains the text: "A Letter to the Editor is received in response to a published paper."
- The bottom box, with a red arrow pointing to the "Linked Submissions" link in the "Action" column, contains the text: "The Editorial Office can link this Letter to the Editor to the published paper using the Linked Submissions link."

Add to/Create Linked Submission Group

A submission may be added to an existing Linked Submission Group, or added as the first submission in a newly created Linked Submission Group.

To add the submission to an existing Linked Submission Group:

Please select a Linked Submission Group from the drop-down below and click the 'Add to Group' button.
Note: A submission can only belong to one Letter to the Editor Group.

Please Select a Linked Submission Group:

To create a new Linked Submission Group:

Click the 'Create a New Group' button to create a new Linked Submission Group that you can add your referring submission to.

Once created, the new Linked Submission Group will be selected by default in the drop-down menu above. Clicking the 'Add to Group' button will then add the referring submission to the newly created group.

Click to create a new 'Letter to the Editor' group that you can add the Letter to the Editor to.

Assign Publish With ID:

Click the 'Assign Publish With ID' button to assign a Publish With ID to your referring submission.

Create a New Linked Submission Group

To create a new Linked Submission Group

Please enter a Linked Submission Group Name (limit of 100 characters) and select a Linked Submission Group Type.

Linked With Group: A general group suitable for linking submission together for a wide variety of uses (e.g., submissions by the same Author or submissions based on a similar topic.)

Letter to the Editor Group: A 'speciality' group where Invited Authors may be provided PDF access to other linked submissions that belong to the group when they are solicited for a commentary. *Note: A submission can only belong to one Letter to the Editor Group.*

Once the new Linked Submission Group has been created, it is selected to/ Create Linked Submission Group page. Clicking the 'Add to Group' button on the Submission Group page will then add the submission to the newly created group.

Enter a Group Name

Linked Submission Group Name:
Maximum Linked Submission Group Name is 100 characters.

Linked Submission Group Type:

Linked With
 Letter to the Editor

Select a Group type

Submit the Group

The Published submission can then be added to the group

[Return to New Submissions](#) | [Editor Main Menu](#) | [Assign Publish With ID](#)

Linked Submission Group											
Action	Linked Submission Group Name										Linked Submission Group Status
Add Submission Edit Linked Group Set Inactive Status Clear Group	Letter to the Editor group for controversial submission										Active
Linked Submissions											
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID	
View Submission Remove from Group	JINGLET61-D-08-00020	Letter to the Editor	Letter to the Editor based on a controversial paper 2.	Josie Cutchens	06-10-2008		06-10-2008	Manuscript Submitted			<input type="checkbox"/> Publish With

The Letter to the Editor has been added as the first submission in the group

Search for the published submission, and it will display in the results

Search Submissions - Search Results

Manuscript Number is equal to 'JINGLET61-D-08-00019'

[Search Again](#)

Select the Published submission

belong to one Letter to the Editor Group. Submissions returned in this search that already belong to the Editor Group are not selectable.

Display 10 results per page.

[Check All](#) [Clear All](#)

Select	Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted	Reviewers	Handling Editor	Assigned Editors	Section
<input type="checkbox"/>	View Submission Details	JINGLET61-D-08-00019		Sarah Elizabeth	Controversial manuscript that generates Letters to the Editor.	Original Study		Key; Words; 102: Musculoskeletal System 102.34: Fascia 102.88: Tendons 102.165: Cartilage		Completed Accept	Jun 10 2008 2:06PM	Jun 10 2008 1:55PM		mary mary	Sean Quincy	

[Check All](#) [Clear All](#)

Page: 1 of 1 (1 total submissions)

Add it to the Letter to the Editor group

[Cancel](#) [Add to Group](#)

Letter to the Editor Linked With

Linked Submission Group										
Action	Linked Submission Group Name									
Add Submission Edit Linked Group Set Inactive Status Clear Group	Letter to the Editor group for controversial submission									
Linked Submissions										
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status	Publish With ID Description	Publish With ID
View Submission Remove from Group	JINGLET61-D-08-00019	Original Study	Controversial manuscript that generates Letters to the Editor.	Sarah Elizabeth	06-10-2008		06-10-2008	Completed Accept		<input type="checkbox"/> Publish With
View Submission Remove from Group	JINGLET61-D-08-00020	Letter to the Editor	Letter to the Editor based on a controversial paper 2.	Josie Cutchens	06-10-2008		06-10-2008	Manuscript Submitted		<input type="checkbox"/> Publish With

[Return to New Submissions](#)

The original published paper has now been added to the group and is linked to the Letter to the Editor

The Author of the original, published submission can then be invited to submit a 'reply' based on any of the linked Letters to the Editor.

This is done by Soliciting a Commentary from the Author based on their original published submission, or any of the Letters to the Editor linked to it in the 'Letter to the Editor' group.



Editors with the 'Invite Authors/Solicit Commentaries' RoleManager permission enabled for their role can invite an Author to submit a manuscript based on an existing submission using the Solicit Commentary feature.

The screenshot displays a web interface for managing submissions. At the top, it says "All Submissions with Final Disposition Accept - mary mary". Below this, there's a "Contents" section and pagination information: "Page: 1 of 2 (37 total submissions)", "1 2 >> >|", and "Display 25 results per page.". A table with columns: Action, Manuscript Number, Article, Article, Author, Initial Date, Status, Current, Editor, Final sition, and Editor Decision is shown. The first row of data has Manuscript Number "08-00019", Article "Study", and Editor "Sean Quinicy". The "Action" column for this row contains several links: "View Submission", "Details", "History", "File Inventory", "Edit Submission", "Solicit Commentary" (highlighted with a red box and an arrow pointing to a yellow callout), "Author Information", "View Reviews and Comments", "Initiate Production", "Transmittal Form", "Similar Articles in MEDLINE", "Search in Google.com", "Search in Pubmed", "Send E-mail", and "Linked Submissions". A second yellow callout box with a red border and arrow points to the "Linked Submissions" link, stating "The Published submission has been linked into the Letter to the Editor Group".

Action	Manuscript Number	Article	Article	Author	Initial Date	Status	Current	Editor	Final sition	Editor Decision
View Submission Details History File Inventory Edit Submission Solicit Commentary Author Information View Reviews and Comments Initiate Production Transmittal Form Similar Articles in MEDLINE Search in Google.com Search in Pubmed Send E-mail Linked Submissions	08-00019	Study	generates Letters to the Editor.	Sarah Elizabeth	1:55PM	2:06PM	Accept	Sean Quinicy	Accept	Accept

When a submission is linked into a 'Letter to the Editor' Group, the Solicit Commentary feature is enhanced to notify an Editor that the submission is part of such a Group, and allows him to provide the Invited Author with PDF access to any of the linked submissions in the Group.

A new Linked Submission Notice Page is accessed as part of the Solicit Commentary process.

This page displays all of the submissions currently linked as part of the Letter to the Editor group.

Linked Submissions for Manuscript N

This submission has been identified as belonging to the following group of linked submissions.

Select the submissions you would like to provide access to:

Letter to the Editor Linked With

[Check All](#) [Clear All](#)

Linked Submissions

Select	Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status Date	Current Status
<input checked="" type="checkbox"/>	View Submission View PDF for Invited Author Remove from Group	JINGLETST61-D-08-00019	Original Study	Controversial manuscript that generates Letters to the Editor.	Sarah Elizabeth	06-10-2008		06-10-2008	Completed Accept
<input type="checkbox"/>	View Submission View PDF for Invited Author Remove from Group	JINGLETST61-D-08-00020	Letter to the Editor	Letter to the Editor based on a controversial paper 2					

[Check All](#) [Clear All](#)

[Cancel](#) [Proceed](#)

The Editor can provide the Author of the published submission with access to PDFs by selecting one or more linked submissions.

Click 'Proceed' to continue with the Solicit Commentary process

Once invited, the Author has access to the Linked Submissions (including the selected Letters to the Editor) from their 'My New Invitations' folder.

The Author is provided with access to an 'Author version' of the Linked Submissions page.

New Author Invitations for Sarah Elizabeth

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

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

Action	Manuscript Number	Article Type	Article Title	Status Date	Current Status	Date Author Invited	Date Response Requested	Days Invitation Outstanding	Editor's Name	Keywords	Classifications
View Submission Requiring Commentary View Invitation Letter Similar Articles in MEDLINE Agree to Submit Decline to Submit	JINGLETST61-D-08-00019	Original Study	Controversial manuscript that generates Letters to the Editor	Jun 10 2008	Completed	Jun 10 2008	Jun 24 2008	0	mary	Key;	102: Musculoskeletal System 102.34: Fascia 188: Tendons 165: Cartilage

[View Submission](#)
[View PDF for Invited Author](#)
[Remove from Group](#)

[View Submission](#)
[View PDF for Invited Author](#)
[Remove from Group](#)

[Check All](#) [Clear All](#)

[Cancel](#) [Proceed](#)

The icon indicates that there are linked submissions

Member of a Letter to the Editor Group

Page: 1 of 1 (1 total submissions)

<< Author Main Menu

This access is carried over into the 'My Accepted Invitations' folder if the Author agrees to submit.

Accepted Invitations for Sarah Elizabeth


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

Action	Manuscript Number	Article Type	Article Title	Date Author Invited	Date Author Accepted	Elapsed Days Since Acceptance Date	Author Submission Due Date	Editor's Name	Keywords	Classifications
View Submission Requiring Commentary View Invitation Letter Submit Invited Manuscript Send E-mail Similar Articles in MEDLINE Linked Submissions	JINGLETST61-D-08-00019	Original Study	Controversial manuscript that generates Letters to the Editor.	Jun 10 2008 5:47PM	Jun 10 2008 5:54PM	0	Jul 25 2008 11:59PM	mary mary	Key; Words;	102; Musculoskeletal System 102.34; Fascia 102.88; Tendons 102.165; Cartilage

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

<< Author Main Menu

When the Invited Author submits his commentary, it is flagged by the system and automatically added to the 'Letter to the Editor' Group its 'parent' submission belongs to. A submission may only belong to one Letter to the Editor Group.

A special linking icon  is displayed next to linked submissions in a 'Letter to Editor' Group, providing immediate visibility to the fact that the submission is in a 'Letter to Editor' Group. Hovering over this icon displays the text "Member of a Letter to the Editor Group".

New Submissions - mary mary

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

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

New Submissions folder				Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Details History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production View Related Submissions Similar Articles in MEDLINE Search in Google.com Search in Pubmed Send E-mail Linked Submissions	Commentary	Response back to all the controversy I caused with my fantastic paper.	Sarah Elizabeth	Jun 10 2008 5:59PM	Jun 10 2008 5:59PM	Manuscript Submitted	

When the commentary is received, an icon is displayed to the Editorial Office as an indication that it has been added to a Letter to the Editor Group

Click to see the submissions it is linked to

Click the [Linked Submissions](#) link to see all of the submissions in the Letter to the Editor group:

Letter to the Editor Group

Letter to the Editor Linked With

Linked Submission Group									
Action	Linked Submission Group Name							Linked Submission Group Status	
Add Submission Edit Linked Group Set Inactive Status Clear Group	Letter to the Editor group for controversial submission							Active	
Linked Subm									
Action	Manuscript Number	Article Type	Article Title	Author Name					
View Submission Remove from Group	JINGLETST61-D-08-00019	Original Study	Controversial manuscript that generates Letters to the Editor.	Sarah Elizabeth					
View Submission Remove from Group	JINGLETST61-D-08-00020	Letter to the Editor	Letter to the Editor based on a controversial paper 2.	Josie Cutchens	06-10-2008	06-10-2008	Manuscript Submitted		<input type="checkbox"/> Publish With
View Submission Remove from Group		Commentary	Response back to all the controversy I caused with my fantastic paper.	Sarah Elizabeth	06-10-2008	06-10-2008	Manuscript Submitted		<input type="checkbox"/> Publish With

The original Author's reply back to the Letters to the Editor has been automatically added to the group

[Return to New Submissions](#)
[Editor Main Menu](#)

When a decision is made on any of the Letters to the Editor in the 'Letter to the Editor' Group, the Notify Author step includes the ability to provide the Author receiving the decision letter with access to all of the linked submissions. A new option; 'Provide Corresponding Author with PDF Access to Related Commentaries' is displayed.

A decision is made on any Letter to the Editor in the group

Notify Author

Manuscript Number: JINGLETST61-D-08-00020
 Title: "Letter to the Editor based on a controversial paper 2."

Provide Corresponding Author with PDF Access to Related Commentaries

Editor Decision: Accept
 Modify Decision:

Copied by typing their e-mail addresses into the blank boxes next to cc. Multiple e-mail addresses can be included, separated by semicolons (;).
 cc: Editors Assigned to Manuscript
 [Sean Quincy \(Editor in Chief\)](#)
 cc:

Provide Corresponding Author with PDF Access to Related Commentaries

Selecting this new option provides the Author receiving the decision letter with access to all of the linked submissions in the Letter to the Editor group (including the reply back).

Because the 'reply back' from the published Author was automatically linked into our group, the Author of the Letter to the Editor will have access to it.

The Author who receives the decision letter has access to an 'Author version' of the Linked Submissions page.

Submissions with an Editorial Office Decision for Author Joscie Cutchens

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

View	View Decision Letter	View Email	Letter to the Editor based on a controversial paper 2.	Jun 10 2008 2:13PM	Jun 10 2008 6:39PM	Accept	Final Disposition at V	Final Disposition ▲▼
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

The Author of the Letter to the Editor can view all of the linked submissions



Linked Submissions page for Authors:

The Author of the linked Letter to the Editor has access to all of the linked submissions in the group

Linked Submission Group Name		Linked Submission Group Status					
Letter to the Editor group for controversial submission		Active					
Linked Submissions							
Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Section/Category	Status
View Submission	JINGLETST61-D-08-00019	Original Study	Controversial manuscript that generates Letters to the Editor.	Sarah Elizabeth	05-10-2008		05-10-2008 Accept
View Submission	JINGLETST61-D-08-00020	Letter to the Editor	Letter to the Editor based on a controversial paper 2.	Josie Cutcher			
View Submission		Commentary	Response back to all the controversy I caused with my fantastic paper.	Sarah Elizabeth	05-10-2008		05-10-2008 Manuscript

Original published submission

Their Letter to the Editor

Published Author's reply back

A new merge field; %LINKED_COMMENTARY_DEEP_LINK% is available for use in Editor Decision letters.

This merge field inserts a deep link into the decision letter.

If an Editor has granted the Corresponding Author access to the PDFs, the deep link provides that Author with access to the Author version of the Linked Submissions page without having to manually login to the system.

The Author can download the PDF for any linked submission that belongs to the same Letter to the Editor Group as their submission.

TO CONFIGURE:

The same *Configure Linked Submission Group Name Preferences* page in PolicyManager used for general (Linked With) Groups is also used for Letter to the Editor Groups.

Configure Linked Submission Group Name Preferences

Please enter a field length for the Linked Submission Group Name value. The character length of Linked Submission Group Names is limited to the value entered.

Field Length: (Maximum Field Length of 1000)

Once the maximum number of characters allowed for Linked Submission Group Name has been specified, go to Editor RoleManager to enable the appropriate permissions. Here again, the permissions related to Letters to the Editor Groups are shared with general (Linked With) submission linking:

1. ‘View Linked Submission Groups’ – This is the “base” permission that allows an Editor to see the Linked Submissions section on their main menu, as well as the Linked Submissions action link and linked submission icons once a submission has been linked into a Linked Submission Group.
2. ‘Create/Edit Linked Submission Groups’ – This permission works in conjunction with the ‘View Linked Submission Groups’ permission. If enabled, the Editor can create a new Linked Submission Group, as well as edit an existing one.
3. ‘Set Active/Inactive Status for Linked Submission Groups’ - This permission works in conjunction with the ‘Create/Edit Linked Submission Groups’ permission. If enabled, the Editor 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:
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

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

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- System Conversion Tasks
- General Searching and Viewing
 - Use Editorial Details Layout:
 - Search All Manuscripts
 - Search Only Assigned Manuscripts
 - View Linked Submission Groups
 - Create/Edit Linked Submission Groups
 - Set Active/Inactive Status on Linked Submission Groups

Journal-centric Language Removed

Throughout Editorial Manager (version 6.0) the terms ‘journal’ and ‘journal office’ are used frequently in onscreen instructions and in other parts of the user interface. This language may be limiting for other types of publications that use EM, such as books, learning aids, self-assessment programs, etc.

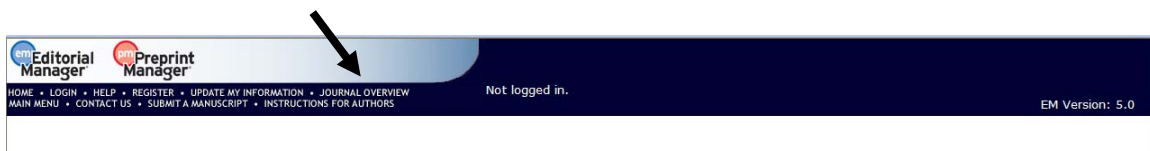
Also, the term ‘manuscript’ is used throughout the system, when the word ‘submission’ generally more accurately refers to conference submissions, book chapters, etc.

In version 6.1, the language on many Editorial Manager pages has been changed to be more generic, so that the instructions and other language makes sense for all types of EM customers. In general, the term ‘journal’ has been changed to ‘publication’, and the term ‘journal office’ has been changed to ‘editorial office’.

The term ‘manuscript’ has also been changed to ‘submission’, *where appropriate*. For example, the ‘Manuscript Number’ that appears on virtually all EM pages is not changed to ‘Submission Number’, and the ‘Submit Manuscript’ interface used by Authors is not changed to ‘Submit Submission’. However, the default Author instructions have been changed to say ‘submission’ instead of ‘manuscript’.

The terminology has been modified only on the general pages accessed by Authors and Editors, where appropriate. Reviewer and Publisher-facing pages have not been changed. Terminology has not been changed in the following areas of the system, due to the complexity of implementing the changes:

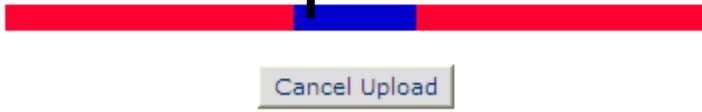
1. Custom Instructions - The editorial office has the ability to customize the Author instructions, and the customized instructions may contain journal-centric language. **This enhancement does not change any language that has been customized by the editorial office**; only the default instructions are changed.
2. Merge Fields
3. Reports
4. System Administration
5. Help Documentation (Note: The terminology will be modified on an ongoing basis via the existing documentation maintenance procedures.)
6. Navigation bar graphics (sample shown below). Note that publication graphics are maintained by the Customer Service group. In the event that an existing customer or potential customer wishes to change ‘Journal Overview’ to some other text, the request would be routed to, and implemented by, Customer Service.



Sample Author-facing pop-up page with the term ‘journal office’ changed to ‘editorial

office'.

Your file is being uploaded, please wait. Note that large files may take several minutes to upload. If your upload fails, please contact the editorial office via the Contact Us button on the navigation bar at the top of the screen.



Cancel Upload

Sample Editor-facing page with the term 'journal' changed to 'publication'.

Submissions Requiring Additional Reviewers - Gene Hackman, M.D.

Contents: New and revised submissions requiring additional Reviewers as defined by the publication. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Make a Decision; 3) Allow current Reviewers to complete their work. Use the up/down arrows to change the sort order.

Page: 1 of 1 (4 total submissions) Display ALL results per page.

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Decision
View Submission Details History File Inventory Edit Submission Classifications Invite Reviewers Solicit Commentary View Reviews and Comments Set Final Disposition Initiate Production Similar Articles in MEDLINE Search in Google.com Search in Pubmed Submit Editor's Decision and Comments Send E-mail	JBJS-D-03-00660R1	Clinical	Primary Souter-Strathclyde Total Elbow Prosthesis in Rheumatoid Arthritis. A long-term follow-up study.***NEW TITLE AS OF 7/9/03****	Joris C.T. van der Lugt, MD, PhD-student	Feb 05, 2003	May 23, 2007	Under Review	B-Revise

TO CONFIGURE: None required.

PROPOSAL ENHANCEMENTS

Proposal Menu as Default Menu

In current functionality, an Editor user can be configured with the 'Editorial Menu' or 'Production Menu' as the default menu when he logs into Editorial Manager (the menu that is initially displayed when he logs in).

Under new functionality, Editor users can now choose to have the 'Proposal Menu' be the default menu.

TO CONFIGURE:

Go to the *Search People – Update Information* page for the user who wants the Proposal Menu to be automatically displayed when he logs in. Go to the 'Default Login Menu' drop-down list and select the new 'Proposal Menu' option. Then click the 'Submit' button to save the change.

The screenshot displays the 'Search People - Update Information' page. On the left, there is a sidebar with the user's name 'Dr. Ed J Editor', registration details, and an 'Inactivate this User' button. The main content area is titled 'User Information' and contains a form for updating user details. The form includes fields for 'User Name' (ed) and 'Password' (ed), a 'Default Login Role' dropdown (Editor), and a 'Default Login Menu' dropdown (Proposal Menu). The 'Default Login Menu' dropdown is open, showing three options: 'Proposal Menu', 'Editorial Menu', and 'Production Menu'. A black arrow points to the 'Proposal Menu' option. Other fields include 'Available as a Reviewer?', 'Board Member?', 'Forbidden as a Reviewer?', 'Reviewer Role', 'Publisher Role', 'Editorial Role', and 'Editor Description'. There are also buttons for 'Activity Details' and 'Additional People Details'.

Create Proposal without Building PDF

In EM version 6.0, creating a Proposal requires the user to build a submission file into a PDF. First, the Editor clicks the Initiate Proposal link on the Proposal Menu and is taken to the *Target Publication Schedule* page to begin the process of proposal creation. The Editor enters target publication information and other data, and then clicks the 'Proceed' button which navigates to a confirmation page. Once the Editor clicks 'Confirm Dates and Proceed' on the confirmation page, the information is saved, and the Editor is taken to the manuscript submission interface to build a Proposal submission and related PDF.

New in EM version 6.1, a Proposal can be created, assigned to an Editor, and Authors invited without having to go through the steps of building and approving a PDF.

The *Target Publication* page (reached when the Initiate Proposal link is clicked) is renamed *Initiate Proposal*, and is enhanced to support Proposal creation without building a PDF. Two new buttons are displayed:

- 'Proceed with no PDF' - Sends the Proposal to the *New Proposals Requiring Assignments* folder and displays a new *Proposal Confirmation* page.
- 'Assign to Myself and Invite Authors' - This button is shown only to Editors with the RoleManager permissions 'Invite Authors' and 'Receive Assignments in New Assignments folder'. Clicking the button creates the Proposal and takes the Editor directly to the *Author Selection Summary* page.
 - If the publication is configured for manual manuscript numbering, a manuscript number must be entered on the *Initiate Proposal* page before the user can proceed to the *Author Selection Summary* page.
 - If the publication is configured for automated manuscript numbering, the manuscript number is automatically assigned when the 'Assign to Myself and Invite Authors' button is clicked and the user proceeds to the *Author Selection Summary* page.
- The existing 'Proceed' button is renamed 'Proceed and Build PDF'. Clicking this button allows the Editor to upload a Submission Item and build it into a PDF for the Proposal, as in EM version 6.0.

Note the following additional changes to make the *Initiate Proposal* page comprehensive:

- Article Type drop-down menu - The Proposal Article Type must now be chosen at this stage in the process.
- Article Title text entry area - The Proposal Title must now be entered on this page.
- Author Submission Due Date - This information is now displayed on this page if the Author's due date is dependent on the 'Number of Days prior to Target Publication Date'.

Initiate Proposal

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

Article Type:	None	
Title:	<input type="text"/>	
Target Publication Date:	<input type="text"/>	(mm/dd/yyyy)
Target Publication Volume:	<input type="text"/>	
Target Publication Issue:	<input type="text"/>	
Author Invitation Due: Number of Days Author has to Respond to Invitation	<input type="text" value="0"/>	A value of zero indicates the Invitation due date feature is not being used.
Author Submission Due: Number of Days prior to Target Publication Date	<input type="text" value="0"/>	A value of zero indicates the Submission due date feature is not being used.
Author Submission due Date:	<input type="text"/>	

NOTE: The existing page *Confirmation of Target Publication Schedule* is removed from the system and no longer appears during the Proposal creation process. All information appearing on this page in EM version 6.0 has been relocated to the *Initiate Proposal* page.

If the user clicks 'Proceed with no PDF', a new confirmation page is displayed.

New Proposal Confirmation	<p>Your proposal, "Stacey's Test Proposal" has been created and is now in the folder 'New Proposals Requiring Assignments'.</p> <p>New Proposals Requiring Assignments Proposals Menu Editors Menu</p>
----------------------------------	--

NOTE: If the user creates the Proposal without building a PDF, the [View Proposal](#) link is not shown in the system, because there is no PDF to be viewed.

TO CONFIGURE: No configuration is necessary.

Send Multiple Invitations to the Same Author

In EM version 6.0, an Author may be invited to respond to a proposal or to submit a commentary on an existing submission. The Author can be invited only once for a particular submission, but can be re-invited if he declines.

In EM version 6.1, this feature is enhanced to allow multiple invitations to be sent to the same Author for a particular proposal or submission. The Editor can now enter the 'Number of Invitation Letters' to be sent to each Author on the *Search for Authors* page. The Author can also be invited multiple times after the initial invitation. This allows the Author to submit multiple manuscripts in response to a proposal or commentary.

**Search for Authors - Manuscript CAROLINETEST60-D-07-00004
"Test Submission"**

[Manuscript Details](#)

[Help with Searching](#) [Insert Special Character](#)

Criterion	Selector	Value	
Last Name	Begins With	y	END
Last Name	Begins With		END
Last Name	Begins With		

Clear Search

Override Number of Days Author has to Respond to Invitation:

Override Author Submission Due Date: (mm/dd/yyyy)

Target Publication Information: Date: 04/30/2009 Volume: 55 Issue: 11

Author Candidates

Check the box for each person you want to invite to submit, and then proceed.

Page: 1 of 9 (87 total Authors) Display 10 results per page.

Select	Number of Invitation Letters	Author Name	Board Member	Classifications*
<input type="checkbox"/>	<input type="text"/>	Ramazan Yamaj, MD	No	1 Class matches with MS * 10: ANATOMY / EMBRYOLOGY
<input type="checkbox"/>	<input type="text"/>	Bulent Yamouchi, MD Author Invited - Jan 15, 2007 Author Invited - Jan 15, 2007	No	
<input type="checkbox"/>	<input type="text"/>	Naim Yildirim, MD	No	
<input type="checkbox"/>	<input type="text"/>	Ilgaz Yalvac, MD	No	
<input type="checkbox"/>	<input type="text"/>	Harry Yamada, MD PhD	No	
<input type="checkbox"/>	<input type="text"/>	Hillary Yamada, PhD	No	
<input type="checkbox"/>	<input type="text"/>	Kevin Yamada, MD	No	
<input type="checkbox"/>	<input type="text"/>	Masako Yamada, MD	No	

(* indicates match between Author and Manuscript Classifications)

Page: 1 of 9 (87 total Authors) Display 10 results per page.

Cancel Proceed

NOTE: Each invitation letter is sent individually, and can be customized.

If an Author has been invited multiple times, his name appears multiple times on the *Author Selection Summary* page, with the color-coded status and status date for each individual invitation.

Author Selection Summary - Manuscript CAROLINETEST40-D-05-00035 "Testing carrying forward a reference-checked file during revision"

[Manuscript Details](#)

Invited Authors		
Search My Journal	Search for Authors	<input type="button" value="Go"/>
Duncan spec	Author Complete - Jan. 21, 2007	
Hirokazu Takahashi, MD	Agreed to Submit - Jan. 3, 2007	Un-invite
Ralph C. Eagle, Jr., MD	Author Invited - Dec. 21, 2006	Un-invite
Ralph C. Eagle, Jr., MD	Author Invited - Dec. 21, 2006	Un-invite
Ralph C. Eagle, Jr., MD	Author Invited - Jan. 5, 2007	Un-invite
Marcus Allan East, MD	Author Invited - Jan. 3, 2007	Un-invite
Bilbao-Calabuig Rafael, MD	Author Invited - Jan. 3, 2007	Un-invite
Bilbao-Calabuig Rafael, MD	Author Invited - Jan. 3, 2007	Un-invite
Hari Raghu, PhD	Author Invited - Jan. 3, 2007	Un-invite
Hitoshi Takagi, MD, PhD	Author Invited - Jan. 3, 2007	Un-invite
Masahiro Zako, MD	Author Invited - Jan. 3, 2007	Un-invite
Ralph C. Eagle, Jr., MD	Author Declined - Dec. 24, 2006	
Shafiqur Rahman, etc.	Author Declined - Dec. 24, 2006	
Hidenori Takahashi, PhD	Author Un-invited - Jan. 15, 2007	
Hadi J Zambarakji, M.D	Author Un-invited - Jan 15, 2007	

[Return to Pending Proposals](#)
[Editor Main Menu](#)

NOTE: Clicking the [Un-invite](#) link un-invites the Author from that specific invitation only; it does not un-invite the Author from any other invitations associated with the submission.

If an Author is invited multiple times, he will see each individual invitation in the *My New Invitations* folder on the Author Main Menu.

The *Author Invitation Status Report* and *Authors Invited – No Response Report* also display the multiple invitations.

Increased Flexibility Sending Author Invitation Letters

In EM version 6.0, the Editor can send a letter to the Invited Author(s) at the time of invitation. This letter is configured in ActionManager (for the 'Invite Authors for Proposal' event or the 'Solicit Commentary on Submission' event) and can be customized by the Editor before sending.

In EM version 6.1, this feature is enhanced so that the Editor can choose from more than one letter at the time of Author invitation. The Editor's letter choices are limited to those in the new 'Author Invitation' Letter Family, rather than having to choose from all letters in the system. The Editor will also have visibility to the Author's Unavailable Dates (and may therefore decide not to invite a particular Author), and can distinguish between 'Authors to Invite' and 'Others Notified of Author Invitation'.

After the Editor has selected Authors to invite and clicks the 'Proceed' button, he is taken to a new page where he can select and customize multiple letters.

- The 'Letter' column contains a drop-down list of all letters assigned to the new 'Author Invitation' Letter Family. Any of the letters assigned to this family may be selected (and customized if desired), and used as the invitation letter.
- Letters sent to non-Author roles are segregated into a separate section of the page, headed 'Others Notified of Author Invitation'.
 - NOTE: These additional letters are the ones configured for the ActionManager events 'Invite Authors for Proposal' or 'Solicit Commentary on Submission' for non-Author roles.

Select Authors - Confirm Selection and Customize Letters

You have selected the following people to invite to submit a manuscript ([Less](#)). 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.

To change the letter sent to an individual Author, click the Letter drop-down box next to that person's name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If there is a letter you do not want to send, check the Do Not Invite box next to that letter's name. When you click Send All Letters, that letter will not be sent.

Authors to Invite

Name	Letter	Do not Invite
Mark F. Abel, M.D. Unavailable	Author Invitation	<input type="checkbox"/>
Mark F. Abel, M.D. Unavailable	Author Invitation Customize	<input type="checkbox"/>
Douglas A. Barnes, M.D.	Author Invitation Customize	<input type="checkbox"/>

Others Notified of Author Invitation

Name	Letter	Do not Send
James J Editor, M.D. (Associate Editor)	Editor Notice of Author Invitation Customize	<input type="checkbox"/>
James J Editor, M.D. (Associate Editor)	Editor Notice of Author Invitation Customize	<input type="checkbox"/>
James J Editor, M.D. (Associate Editor)	Editor Notice of Author Invitation Customize	<input type="checkbox"/>
Douglas A. Barnes, M.D. (Journal Office Staff)	Journal Office Notice of Author Invitation Customize	<input type="checkbox"/>
Douglas A. Barnes, M.D. (Journal Office Staff)	Journal Office Notice of Author Invitation Customize	<input type="checkbox"/>
Douglas A. Barnes, M.D. (Journal Office Staff)	Journal Office Notice of Author Invitation Customize	<input type="checkbox"/>

NOTE: This new page replaces the 6.0 pages *Select Authors – Customize Letters* and *Select Authors – Default Letters* reached when the Editor clicks the ‘Proceed’ button on the *Search for Authors* page.

TO CONFIGURE:

No configuration is necessary if your publication already has letters associated with the ActionManager events ‘Invite Authors for Proposal’ and ‘Solicit Commentary on Submission’ in version 6.0 (these letters will be automatically assigned to the new ‘Author Invitation’ letter family).

However, if you want to create new letters for use with Author Invitation functionality in version 6.1, you must assign the new letter(s) to the new Letter Family so that they will be available for selection on the *Select Authors – Confirm Selections and Customize Letters* page. To do this, click the Edit Letters link in PolicyManager and click the ‘Add’ button to create a new letter. You can also assign existing letters to the ‘Author Invitation’ letter family by clicking the Edit link on the *Edit Letters* page.

Add Letter


Please enter a Letter Purpose and Subject, and select a Letter Family for your new letter. Letter Families are used so that the correct type of letter is available for certain functions (such as Reviewer Reminders and Editor Decisions). After you select a Letter Family, the page will refresh and allow you to enter additional information about this letter, including the Letter Body.

Letter Purpose:

Subject:

Letter Family: Please select a Letter Family ▾

- Please select a Letter Family
- Ad Hoc From Author
- Ad Hoc From Reviewer
- Ad Hoc From Editor
- Ad Hoc From Publisher
- Ad Hoc for Proposal
- Decision
- Communications to Author
- Author Invitation**
- Author Reminder
- Editor Reminder
- Production Reminder
- Reviewer Reminder
- Reviewer Invitation
- Reviewer Notification
- Batch E-mail
- Production
- Terminate Assignments
- General



Send Ad Hoc E-mails for Proposals

For all Editors with RoleManager permission to 'Send Ad Hoc E-mail', the Send E-mail link is added to the following folders on the *Proposal Menu*:

1. New Proposals Requiring Assignments
2. New Assignments – Proposals
3. My Pending Proposals
4. View All Assigned Proposals
5. My Completed Proposals
6. View All Completed Proposals
7. Search Proposals

View All Assigned Proposals - Gene Hackman, M.D.

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

Page: 1 of 1 (5 total proposals) Display 10

Action ▲	Proposal Manuscript Number ▲▼	Proposal Article Type ▲▼	Proposal Article Title ▲▼	Section/Category ▲▼	Initial Date of Proposal ▲▼	Editor Originating Proposal ▲▼	Handling Editor ▲▼	# of Authors Invited ▲▼	# of Authors Accepting ▲▼	# of Authors Declining ▲▼	# of Author Submission ▲▼
View Proposal Details History File Inventory Classifications Edit Proposal Undo Assignment Invite Authors View Related Submissions Set Final Disposition Similar Articles in MEDLINE Search in Google.com Search in Pubmed Send E-mail <hr/> View Proposal Details History	STACEYTEST60-D-07-00005	Proposal	Proposal for Special Article		May 07, 2007	Gene Hackman, M.D.	Gene Hackman, M.D.	8	2	0	1



When the user clicks the Send E-mail action link, the *Send Ad Hoc E-mail* pop-up page is launched. Only letters assigned to the new 'Ad Hoc for Proposal' letter family are available for selection.

Send Ad Hoc Email

The journal has pre-configured one or more letters which you may use as a starting point. Select a letter, then click 'Customize Letter' to open the letter, insert your comments, and send the letter.

Please Choose a Letter ▼
Please Choose a Letter
Another New Ad Hoc Proposal Letter
New Ad Hoc Proposal Letter

TO CONFIGURE:

Go to the *Edit Letters* page in PolicyManager and click the 'Add' button to create a new letter. Select 'Ad Hoc for Proposal' in the Letter Family drop-down list and proceed to create the letter.

NOTE: When the publication upgrades to version 6.1, there are no letters assigned to this Letter Family. If no 'Ad Hoc for Proposal' letters are created, the Send E-mail link will not be shown on Proposal pages.

Add Letter


Please enter a Letter Purpose and Subject, and select a Letter Family for your new letter. Letter Families are used so that the correct type of letter is available for certain functions (such as Reviewer Reminders and Editor Decisions). After you select a Letter Family, the page will refresh and allow you to enter additional information about this letter, including the Letter Body.

Letter Purpose:

Subject:

Letter Family: Please select a Letter Family ▾

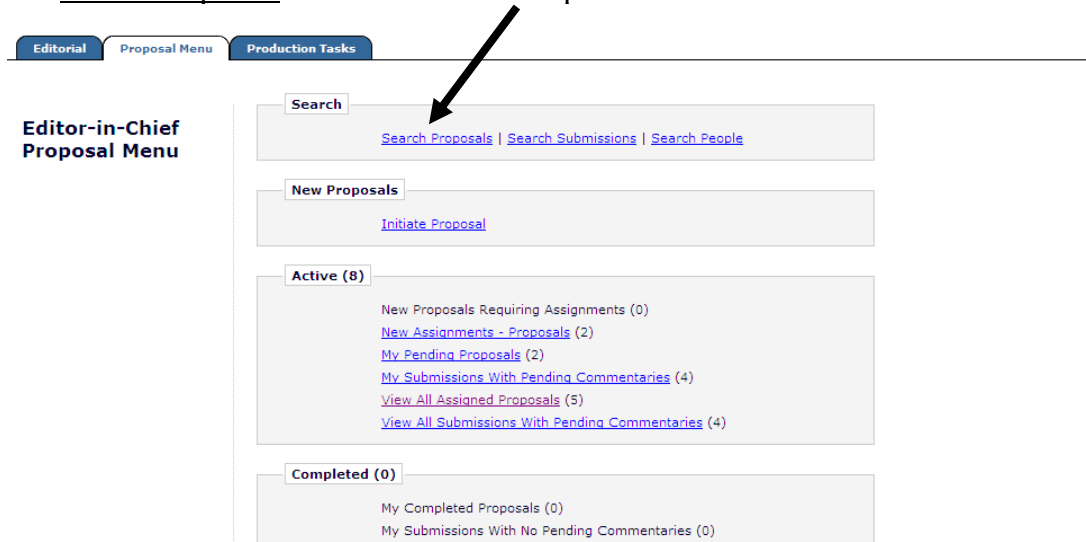
- Please select a Letter Family
- Ad Hoc From Author
- Ad Hoc From Reviewer
- Ad Hoc From Editor
- Ad Hoc From Publisher
- Ad Hoc for Proposal**
- Decision
- Communications to Author
- Author Invitation
- Author Reminder
- Editor Reminder
- Production Reminder
- Reviewer Reminder
- Reviewer Invitation
- Reviewer Notification
- Batch E-mail
- Production
- Terminate Assignments
- General



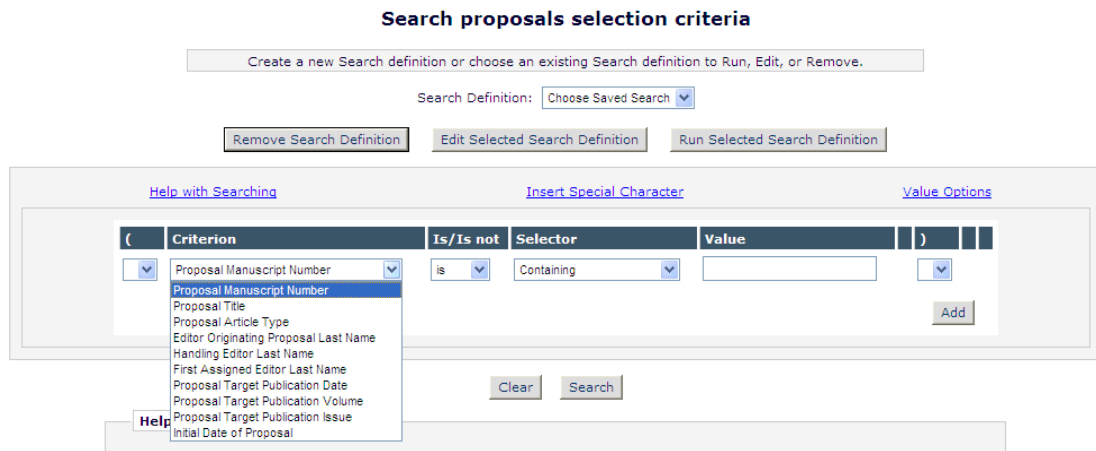
Search Proposals

In EM version 6.0, the Editor user can search for manuscripts by clicking the [Search Submissions](#) action link, but Proposals are not available for searching.

In version 6.1, Editors with RoleManager permission to ‘Search All Proposals’ can see a new [Search Proposals](#) action link on the Proposal Menu.



Clicking the [Search Proposals](#) link takes the user to a new page similar to *Search Submissions*, where the user can enter desired selection criteria related to Proposals. Like *Search Submissions*, the user can enter an unlimited number of search parameters and save the search criteria for future use.



- Use the [Value Options](#) link to view standard lists and classifications; you can copy and paste Values from there.
- The required format for date entry is mm/dd/yyyy. If the date is not entered in this format, you will be required to re-enter the date in the specified format.
- You must enter at least one set of criteria in the Value box to execute a search. We recommend entering as much criteria as you know. The more refined the criteria, the quicker your results will be returned.
- If you combine AND and OR relations, use the parentheses to ensure the evaluations are carried out in the right order. If you do not use parentheses, or combine AND and OR within parentheses, the AND relationship is evaluated first.
- Selections are case-insensitive. You may enter any mixed case value.
- You can check for empty (no value) fields by selecting the "Unspecified" Selector.

[Return to Proposals Menu](#)

NOTE: Target Publication Date, Volume and Issue all pertain to the Proposal parent submission; not any child submissions associated with the Proposal.

The results of the Proposal search are limited to submissions in the 'Proposal' Article Type Family, with a link to [View Related Submissions](#) associated with the Proposal.

Search Proposals - Search Results

Initial Date of Proposal is greater than or equal to '01/01/2007'

[Save Search](#) [Search Again](#)

Page: 1 of 1 (1 total proposals)

Display 10 results per page.

Action	Proposal Manuscript Number	Proposal Article Type	Proposal Article Title	Section/Category	Initial Date of Proposal	Editor Originating Proposal	Handling Editor	# of Authors Invited	# of Authors Accepting	# of Authors Declining	# of Author Submissions	Initial Date Authors Invited	Target Pub. Date	Target Pub. Volume	Target Pub. Issue	Status Date	Current Status
View Proposal View Related Submissions Details History File Inventory Classifications Edit Proposal Undo Assignment Invite Authors Similar Articles In Medline Send E-mail	STACEYTEST60-D-07-00005	Proposal	Proposal for Special Article		5/7/2007 2:45:51 PM	Gene Hackman, M.D.	Gene Hackman, M.D.	8	2	0	1	6/19/2007 11:46:36 AM	8/1/2007 12:00:00 AM	A	22	5/7/2007 2:50:30 PM	Editor Invited

Page: 1 of 1 (1 total proposals)

Display 10 results per page.

TO CONFIGURE:

Go to Editor RoleManager and enable the new permission 'Search All Proposals' for the desired Editor Role(s). This new permission is **not** automatically enabled for any roles when the publication upgrades to version 6.1.

Edit Role Definition

Role Name:

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

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

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries

Use Proposals Details

Layout

- Search All Proposals
- Initiate Proposals
- Invite Authors/Solicit Commentaries
- Override Author Invited Submission Due Dates
- View All Proposals and Submissions with Commentaries
- Set Final Disposition on Proposals

New Deep Links for Author Invitations

A 'deep link' is a merge field that Editors may include in an e-mail notification sent from EM. The recipient of the e-mail can click on the hyperlink in the e-mail body and be taken directly to the relevant page in the system.

Three new deep links are added in EM version 6.1 for use with Author invitation functionality. These links are intended to be included in Author invitation letters.

1. %ACCEPT_INVITATION% - When an invited Author clicks the deep link in the e-mail received from EM, the system determines whether the invitation is still in a state where it can be accepted. If it is, the Author is automatically logged in and taken directly to the *Accept Invitation* page.

Author Accept Invitation

Thank you for agreeing to the invitation for Manuscript Number
CAROLINETEST61-D-08-00003.

The manuscript is now in your [My Accepted Invitations](#) folder.

[My Accepted Invitations](#)

[Return to Main Menu](#)

[Log out of Editorial Manager](#)

If the invitation is not still in a state where it can be accepted, the user is not logged in and is presented with an informational message indicating that the invitation is no longer in a status where it can be accepted.

2. %DECLINE_INVITATION% - When an invited Author clicks this link in the e-mail received from EM, the system determines whether the invitation is still in a state where it can be declined. If it is, the Author is automatically logged in and taken directly to the *Decline Author Invitation* page.

Decline Author Invitation for CAROLINETEST61- D-08-00003

Please state a reason for declining the invitation. Please suggest a colleague(s) qualified to submit an article on this subject. Provide some information that will help us contact this person.

Cancel

Submit

If the invitation is not still in a state where it can be declined, the user is not logged in and is presented with an informational message indicating that the invitation is no longer in a status where it can be declined.

3. %SUBMIT_INVITED_MANUSCRIPT% - When an invited Author clicks this link, the system determines whether the invitation is still open (the submission still appears in the *My New Invitations* or *My Accepted Invitations* folder). If the invitation is still open, the invitation is automatically marked as accepted and the Author is logged in and taken to the Manuscript Submission interface.

If the invitation is not still open, an informational message is shown, informing the Author of possible causes of the problem.

TO CONFIGURE:

Click the Edit Letters link in the ‘E-mail and Letter Policies’ section of PolicyManager. Then click the Edit link to modify an existing Author Invitation letter, or click the ‘Add’ button to create a new letter. Insert the new deep link merge field(s) in the desired Author Invitation letters.

Edit 'Author Invitation' Letter

Letter Purpose:

Subject:

Letter Family:

Sender's E-mail Address: "The Journal of Bone and Joint Surgery" <trash@ariessys.com>

Use Corresponding Editor's E-mail address
 Use Corresponding Production Editor's E-mail address

Automatic cc: Corresponding Editor
 Corresponding Production Editor

Letter Body:

```

The publication would like you to submit an article!

Click here to accept the invitation: %ACCEPT_INVITATION%

Click here to declinethe invitation: %DECLINE_INVITATION%

If you want to accept the invitation and submit now, click
here: %SUBMIT_INVITED_MANUSCRIPT%

Thank you!
  
```

PRODUCTION TRACKING ENHANCEMENTS

Target Publication Information for Individual Submissions

In EM version 6.0, the Target Publication Date, Target Publication Volume and Target Publication Issue (collectively referred to as “Target Publication Information”) are assigned to a Proposal or a submission with commentaries (‘parent’ submission). Those same values are also displayed for all the invited submissions received that are associated with the parent (‘child’ submissions). The child submissions do not have their own Target Publication Information values. Therefore, if you change the Target Publication Information on any one of the submissions, you are changing the value displayed for all of the associated submissions (parent and children).

Submissions assigned to a Production Tracking Schedule Group are assigned the target information pertaining to the Schedule Group.

Some publications use Custom Reports to retrieve the Target Publication Information, but it is only available for the parent submissions of commentaries. There is a separate field in the system (available for Production Tracking users only) called ‘Submission Target Online Publication Date’. This date is editable and can be modified for each individual parent and child submission. However, this field is not currently available via Custom Reports.

New in EM version 6.1, each submission has its own individual Target Publication Date, Target Publication Volume and Target Publication Issue information. Changing the information for an individual submission no longer changes it for other associated (parent and children) submissions.

This information, as well as the Submission Target Online Publication Date, is also available via Custom Reports in version 6.1.

In addition, the mail merge field %TARGET_PUB_DATE% pulls in the Target Publication Date associated with an individual submission. When a submission is assigned to a Production Tracking Schedule Group, the Schedule Group’s target information overwrites any pre-existing Target Publication Date, Target Publication Volume and Target Publication Issue values.

NOTE: At upgrade, all submissions that are associated with a Proposal automatically receive the Target Publication Date, Target Publication Volume and Target Publication Issue of the Proposal, and all submissions associated with a commentary receive the Target Publication Date, Target Publication Volume and Target Publication Issue of the parent submission receiving the commentaries. Exception: All submissions already assigned to a Schedule Group receive the Schedule Group’s Target Publication Date, Target Publication Volume and Target Publication Issue at upgrade.

TO CONFIGURE: No configuration is necessary.