

CONFIDENTIAL AND PROPRIETARY

Aries Systems Corporation



Release Notification

Editorial Manager/Preprint Manager

7.2 General Release Notification

12/1/2009

Subject to Change

Copyright © 2009, Aries Systems Corporation

This document is the confidential and proprietary information of Aries Systems Corporation, and may not be disseminated or copied without the express written permission of Aries Systems Corporation. The information contained in this document is tentative, and is provided solely for planning purposes of the recipient. The features described for this software release are likely to change before the release design and content are finalized. Aries Systems Corporation assumes no liability or responsibility for decisions made by third parties based upon the contents of this document, and shall in no way be bound to performance therefore.

Document Change Log

Date	Version	Change
10/15/2009	Gamma Release	Modifications to display properties of 'Interactive View of the Production Status Grid' section
12/01/2009	General Release	No Changes

Editorial Manager/Preprint Manager 7.2 General Release Notification

GENERAL ENHANCEMENTS	4
ISO 3166-1 Newsletter VI-6 now available	4
Automatic Reviewer Reminders	5
Enhanced Visibility of Reviewer Statuses	10
Enhanced Visibility of Section/Category Information.....	11
Custom Instructions on Author Main Menu	12
Add External Correspondence to Submission (Editorial) Correspondence History.....	14
Batch Item Type Selection for Zip File Contents.....	18
Associating a Custom Flag with an Additional Manuscript Details field	21
Enhanced Unavailability Functionality	26
Enhanced Unavailability Information when Assigning Editors	30
Support for Unicode Characters in E-Mail.....	32
Support for Unicode Characters in downloaded reports	33
New Item Added to the Journal Accountability Report.....	42
Placing 'Quick Links' to saved Searches on Main Menus	44
Sharing Saved Search Definitions with Other Users	46
INTER-JOURNAL RESOURCE SHARING (IJRS) ENHANCEMENTS	51
Cross-Publication Statistics added to Reviewer Selection Pages	51
PRODUCTION TRACKING ENHANCEMENTS	53
Interactive View of the Production Status Grid	53
Display Current Task Assignments Directly on Author Main Menu.....	66
Increased Visibility throughout Production for Authors.....	67
Add External Correspondence to Submission Production Correspondence History	69
Add External Correspondence to Schedule Group Production Correspondence History.....	72
Unavailability Information when Assigning Production Tasks	74
COMMERCE MANAGER OVERVIEW	76
Submission Fee Overview	77
Non-Submission Fee Overview	79

GENERAL ENHANCEMENTS

ISO 3166-1 Newsletter VI-6 now available

The International Standards Organization (ISO) has released Newsletter VI-6. This newsletter changes the country name “the Republic of Bolivia” to “the Plurinational State of Bolivia”. It also incorporates changes from newsletters VI-1 through VI-5. More information on these newsletters is available from the following ISO web site:

http://www.iso.org/iso/country_codes/updates_on_iso_3166.htm .

Newsletter VI-6 is available for use in EM/PM.

TO CONFIGURE:

On the PolicyManager Main Menu, click the ‘Set ISO Country Standard’ link. Select ‘ISO 3166-1 Newsletter VI-6’ from the drop-down list and click the ‘Submit’ button. The ISO Standard Country Report may then be run to identify any non-compliant address records.

em Editorial Manager™

Role: Editor-in-Chief Username: ed

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Set ISO Country Standard

Select an ISO 3166-1 Newsletter version from the drop-down menu.

Choose ISO Standard:

View ISO 3166-1 Newsletter VI-6	Download ISO 3166-1 Newsletter VI-6
View ISO 3166-1 Newsletter V-12	Download ISO 3166-1 Newsletter V-12
View ISO 3166-1 Newsletter V-11	Download ISO 3166-1 Newsletter V-11
View ISO 3166-1 Newsletter V-10	Download ISO 3166-1 Newsletter V-10
View ISO 3166-1 Newsletter V-9	Download ISO 3166-1 Newsletter V-9
View ISO 3166-1 Newsletter V-8	Download ISO 3166-1 Newsletter V-8
View ISO 3166-1 Newsletter V-7	Download ISO 3166-1 Newsletter V-7
View ISO 3166-1 Newsletter V-6	Download ISO 3166-1 Newsletter V-6
View ISO 3166-1 Newsletter V-5	Download ISO 3166-1 Newsletter V-5
View ISO 3166-1 Newsletter V-4	Download ISO 3166-1 Newsletter V-4
View ISO 3166-1 Newsletter V-3	Download ISO 3166-1 Newsletter V-3
View ISO 3166-1 Newsletter V-2	Download ISO 3166-1 Newsletter V-2
View ISO 3166-1 Newsletter V-1	Download ISO 3166-1 Newsletter V-1

Automatic Reviewer Reminders

In EM/PM version 7.1, publications can send E-mail reminders to Reviewers manually, by running the *Reviewer Invited - No Response Report* or the *Reviewer Reminder Report*, selecting the ‘Send Reminder’ checkbox next to the appropriate Reviewer’s name, and proceeding through the reminder sending process. Reminders from these reports can be customized, or if you choose to send the default letter you may schedule reminders to be sent at a date/time in the future.

Publications have requested the ability to send out automatic reviewer reminders, instead of having to manually run the report and select names. In EM/PM version 7.2, the new *Automated Reviewer Reminder Report* allows users to create and save Automated Reminder definitions.

Users with the existing ‘Produce Reports’ permission and the new ‘Create Automated Reviewer Reminders’ permission will see the [Automated Reviewer Reminder Report](#) link on the *Reports Menu*.



Users with the existing ‘Send Reviewer Reminders’ permission and the new ‘Create Automated Reviewer Reminders’ permission will see the [Automated Reviewer Reminder Report](#) link on the *Send Reminder Letters* page (accessible from the Editorial Main Menu).



Clicking the [Automated Reviewer Reminder Report](#) link from either page takes the user to the new page of the same name, where reminder definitions can be set up so that E-mails are sent to Reviewers with outstanding invitations, Reviewers who agreed to review but are late, or Reviewers who agreed to review and their due date is approaching. You can also refine the selection criteria by a particular Reviewer Role, Handling Editor, Article Type or Section/Category. When creating an Automated Reminder definition, you must give it a Reminder Name and select the Reminder Letter that will be sent. All letters in the Reviewer Reminder Letter Family are available for selection in the Reminder Letter drop-down list.

Automated Reviewer Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the automated reviewer reminder e-mails will be sent once every 24 hours to each recipient.

Reminder Type:	<input checked="" type="radio"/> No Response. Send Reminder: Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly <input type="text" value="5"/> days ago. Reminders will be sent to Reviewers who have neither accepted nor declined the review invitation, and have not been un-invited or terminated.	
	<input type="radio"/> Reminder Before Due Date: Send an automated reminder e-mail for reviews that are exactly <input type="text" value="10"/> days before their due date. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.	
	<input type="radio"/> Reminder Past Due Date: Send an automated reminder e-mail for reviews that are exactly <input type="text" value="7"/> days past the due date. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.	
Reviewer Role:	<input type="text" value="(All Reviewers)"/>	
Handling Editor:	<input type="text" value="(All Editors)"/>	
Reminder Name:	<input type="text" value="Insert Special Character"/> <small>Maximum 200 characters</small>	
Reminder Letter:	<input type="text" value="Please Choose an Automated Reminder Letter"/>	

You may further refine your result set by selecting all, or choosing one or more value below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

Article Type:	<input type="text" value="Testing Limits for 5.0-01"/> <input type="text" value="Conference Submission"/> <input type="text" value="Proposal"/> <input type="text" value="AQC and arXiv Testing"/>	Select All Clear All
Section/Category:	<input type="text" value="New Section (hidden)"/> <input type="text" value="No Section Assigned"/>	Select All Clear All

Saved Automated Reminders

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

There are currently no saved automated reminders.

[Return to Send Reminders](#)
[Return to Editorial Menu](#)

Once you have created and saved an Automated Reminder, it is listed at the bottom of the page. The user who created the Automated Reminder is the only user who can remove (stop running) that reminder or edit the criteria. However, all Editors can see the complete list of Automated Reminders that have been created on this page. To stop an Automated Reminder from running, simply click the Remove link.

You may further refine your result set by selecting all, or choosing one or more value below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

Article Type:	<input type="checkbox"/> Testing Limits for 5.0-01 <input type="checkbox"/> Conference Submission <input type="checkbox"/> Proposal <input type="checkbox"/> AQC and arXiv Testing	Select All Clear All
Section/Category:	<input type="checkbox"/> New Section (hidden) <input type="checkbox"/> No Section Assigned	Select All Clear All

[Save as Automated Reminder](#)

Saved Automated Reminders

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

No Response - Invitation Sent 7 Days Ago	Gene Hackman, M.D.	Remove	Edit
Review Due Tomorrow	Gene Hackman, M.D.	Remove	Edit
Review is 3 Days Late	Ed Editor		

[Return to Reports](#)
[Return to Editorial Menu](#)

A batch process runs all saved Automated Reminder definitions once in each 24 hour period. If the publication wishes to send multiple reminders, multiple Automated Reminder Definitions can be saved (e.g. a reminder for 15 days before the due date, a separate reminder for 10 days before the due date, and another reminder for 5 days before the due date). Each saved reminder can have its own letter associated with it.

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

Some notes about Automated Reminders:

1. The reminder queries retrieve records that meet the criteria exactly. For example, a reminder that stipulates a reminder to be sent "if the review is exactly 10 days late", does not generate a reminder on day 11, day 12, day 13 etc.
2. Users that have the 'Restrict Reminder Reports to Assigned Submissions' permission enabled are also able to save automated reminder criteria, triggering the creation of batch automated reminders that are delivered only to Reviewers associated with their assigned submissions.
3. If the Editor who saved the reminder is 'blinded' to a submission that matches the Automated Reminder criteria, no automated reminder E-mail will be sent (this is to resemble what would happen if the Editor were manually running a *Reviewer Reminder* report, where they would not see any submission to which they are blinded).
4. Reminders sent from the *Automated Reviewer Reminder Report* increment the reminder count fields in the database. Reminder counts are displayed on the *People Activity Details* page, *Reviewer Reminder Reports* and the *Reviewer Performance Report*.
5. All automated reminder letters are written to the Correspondence History, following the logic used for the manual reminder letters.

TO CONFIGURE:

Go to Editor RoleManager and enable the new ‘Create Automated Reviewer Reminders’ permission for the desired Editor Role(s). Make sure the Editor Role also has either ‘Produce Reports’ permission or ‘Send Reviewer Reminders’; otherwise he will not be able to access the *Automated Reviewer Reminder Report*.

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
- General Searching and Viewing
- Edit Submission
- Transmittal Form
- Sending E-mail
- Viewing and Editing People Data
- Flag Icons
- Proxy Activities
- Administrative and Reporting Functions**
 - System Administration Functions
 - Unrestricted Access
 - Restricted Access
 - Produce Reports
 - Create Automated Reviewer Reminders
 - Send Reviewer Reminders
 - Send Editor Reminders
 - Send Author Reminders
 - Restrict Reminder Reports to Assigned Submissions
 - Search/Manage Conference Submissions
 - Initiate Rebuttal

Enhanced Visibility of Reviewer Statuses

In EM/PM version 7.1, Editors could only view invited Reviewer statuses by navigating to the *Details* page or *Invite Reviewers* page for a submission. New in version 7.2, a 'Review Status' column is added in the following Editor folders:

- Submissions with Rescinded Decision
- Submissions with Required Reviews Complete
- Submissions Requiring Additional Reviewers
- Submissions with One or More Late Reviews
- Reviewers Invited – No Response
- Submissions Under Review
- Submissions with X Reviews Complete
- View All Assigned Submissions
- Group by Editors I Assigned
- Group by Editor with Current Responsibility
- Group by Manuscript Status

The 'Review Status' column is color-coded for better visibility and displays the following information for the current revision of each submission:

Information	Display Format
Numbers of reviews completed	Complete [green]
Number of reviews with a partial review saved	Partial Review Saved [teal]
Number of reviewers agreed who have not started their reviews yet	Agreed [orange]
Number of reviewers invited who have not responded	Invited – No Response [red]
Numbers of reviewers late	Late [bold red]

Submissions Under Review - Edward Editor, MD										
<small>Contents:</small> Submissions for which one or more Reviewers have Agreed to review, but have not yet completed their reviews. These submissions require one of the following actions: 1) Invite Additional Reviewer (s); 2) Allow current Reviewers to complete their work; 3) Make a Decision; 4) Un-invite Reviewer(s). Use the up/down arrows to change the sort order.										
Page: 1 of 1 (4 total submissions) Display 10 results per page.										
Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status	Editor Decision ▲▼
View Submission Details History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Set Final Disposition Initiate Production Similar Articles in MEDLINE Submit Editor's Decision and Comments Send E-mail	DEMO-D-04-00095	Original Study		LaTeX Test	Kevin M. Carlson	Nov 19 2003 4:51PM	Aug 6 2009 11:12AM	Under Peer Review	1 Complete 1 Partial Review Saved 1 Agreed 1 Invited - No Response 2 Late	

TO CONFIGURE:

No configuration is required. All Editor roles will see this column displayed in the above folders.

Enhanced Visibility of Section/Category Information

In EM/PM version 7.1, Section/Category information for submissions was only displayed in a subset of folders on the Editorial and Proposal menus. New in version 7.2, the ‘Section/Category’ column is added in all Editor folders for publications where there is at least one non-hidden Section/Category configured.

NOTE: This column is also displayed in ‘Search Submissions’ (Editorial view), ‘Search Proposals’, ‘My Completed Proposals’, and ‘View All Completed Proposals’ when there is at least one non-hidden OR HIDDEN Section/Category configured for the publication.

Submissions with Decisions Rescinded - Laurel Quinn

Contents: New and revised manuscripts for which the Editor's decision has been rescinded. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Assign another Editor; 3) Make another Decision. Use the up/down arrows to change the sort order.

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

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Review Status	Editor Decision
View Submission Details History File Inventory Edit Submission Classifications Assign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Similar Articles in MEDLINE Submit Editor's Decision and Comments	INFORM-2009-7	Original Study	Special Section: The Semantic Web	Convergence of the Enterprise and Internet Communities: Adoption of Semantic Web Methodologies by Enterprise Information Structure Professionals	Oak Allerton	Apr 03, 2009	Apr 08, 2009	Required Reviews Completed	5 Complete	
View Submission Details History File Inventory Edit Submission Classifications Assign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Similar Articles in MEDLINE Submit Editor's Decision and Comments	INFORM-2009-8	Original Study	Special Section: The Semantic Web	Fragmented Classification in XML DTD Taxonomy	Coal Hopkins	Apr 03, 2009	Apr 08, 2009	Required Reviews Completed	2 Complete	

Page: 1 of 1 (2 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.

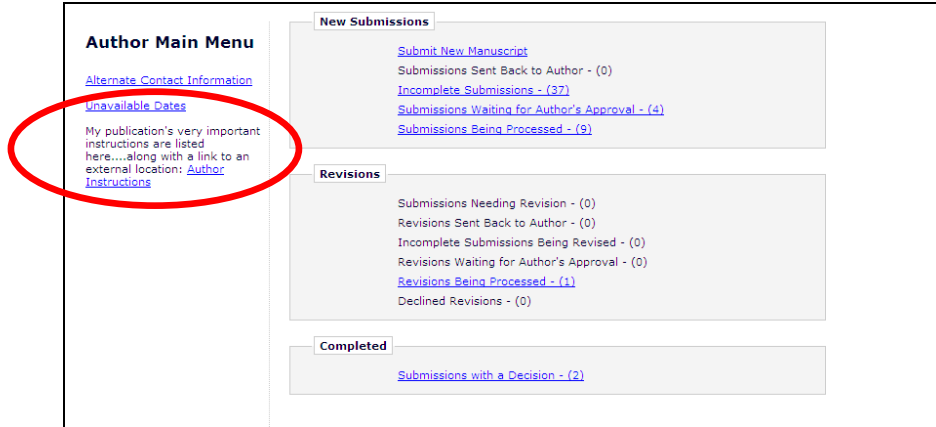


TO CONFIGURE:

In PolicyManager, navigate to the existing ‘Edit Sections/Categories’ link to configure Section/Categories for your publication. When Section/Categories are configured, all Editor roles will see this column displayed.

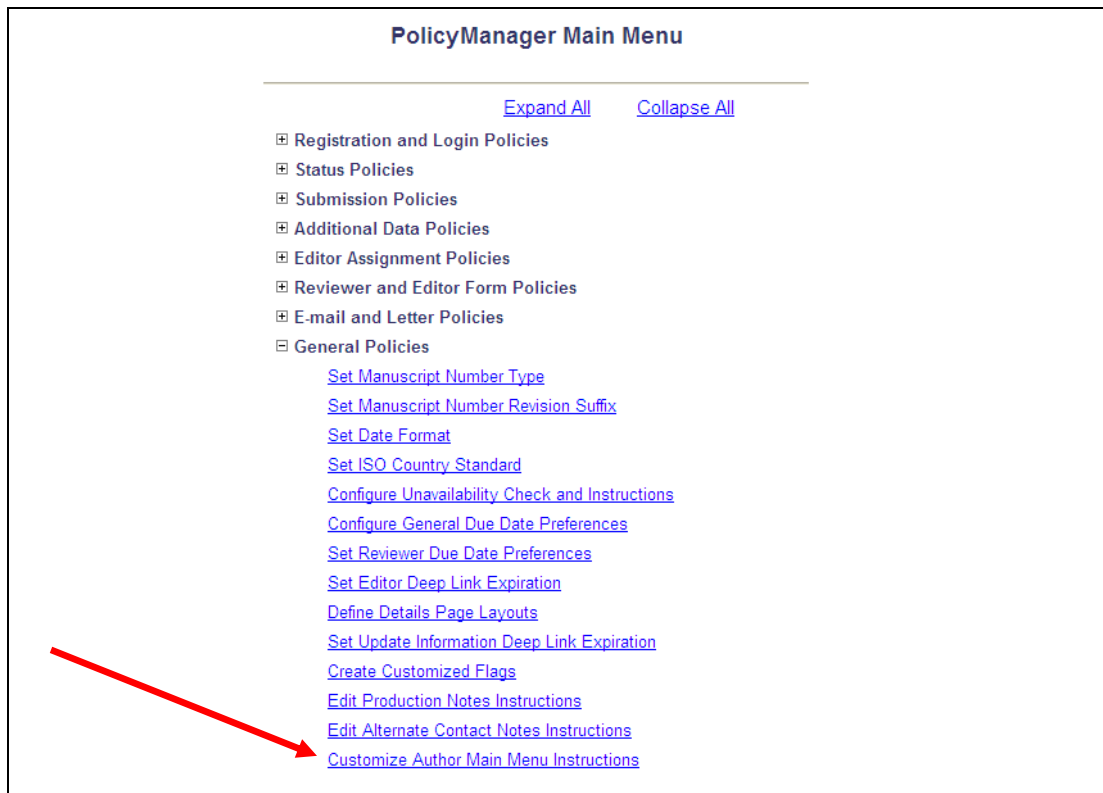
Custom Instructions on Author Main Menu

In EM/PM version 7.2, you can now customize instructions to display on the Author Main Menu. These instructions are displayed for all Authors.



TO CONFIGURE:

Click the new [Customize Author Main Menu Instructions](#) link in the General Policies section of PolicyManager.



Enter the text you would like displayed on the Author Main Menu.

NOTE: Check the text carefully, because as soon as this page is submitted the text will be displayed to all Authors!

Customize Author Main Menu Instructions

Enter the custom instructions you would like Authors to see on the Author Main Menu page. Please check the text carefully, as the instructions will be immediately visible to all Authors as soon as you click the 'Submit' button.

[Insert Special Character](#)

TIP: You can use HTML to format the text or create hyperlinks to external documents.

Customize Author Main Menu Instructions

Enter the custom instructions you would like Authors to see on the Author Main Menu page. Please check the text carefully, as the instructions will be immediately visible to all Authors as soon as you click the 'Submit' button.

[Insert Special Character](#)

```
My publication's very important instructions are listed here...along with a link to
an external location:
<a href=http://www.myurl.com>Author Instructions</a>
```

Add External Correspondence to Submission (Editorial) Correspondence History

New in EM/PM version 7.2, Editors may be given permission to manually add External Correspondence entries (an item of correspondence, such as an E-mail, received outside of the EM/PM system) to the History of a submission, where they can be viewed alongside EM/PM-generated Internal Correspondence.

Editors with the new ‘Add/Edit External Correspondence’ permission enabled will see a new ‘Add Editorial Correspondence’ button at the top of the ‘Correspondence History’ section of the *History* page. This new permission is not selected (not enabled) upon upgrade.

History for DOI: Unassigned
Anthony Author (UNITED STATES): "Migratory patterns of Tree Frogs"

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

STATUS HISTORY

Status Date	Document Status	Production Status	Status Days	Role Family	Revision	Operator
Jul 14 2009 10:48AM	Received by Journal		----	EDITOR	0	Anthony Author, MD
Jul 14 2009 10:48AM	Needs Approval		----	AUTHOR	0	Anthony Author, MD
Jul 14 2009 10:47AM	Building PDF		----	AUTHOR	0	Anthony Author, MD
Sep 9 2005 4:41PM	Incomplete		1404	AUTHOR	0	Anthony Author, MD

CORRESPONDENCE HISTORY

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Jul 14 2009 10:48AM	Journal Office Notice New Submission	Geraldine Ferraro	Received by Journal	0	Anthony Author, MD
Jul 14 2009 10:48AM	Journal Office Notice New Submission	Mary François Smith, PhD	Received by Journal	0	Anthony Author, MD
Jul 14 2009 10:48AM	Author Submits New Manuscript Confirmation	Anthony Author, MD	Received by Journal	0	Anthony Author, MD
Jul 14 2009 10:48AM	None	Anthony Author, MD	Building PDF	0	Anthony Author, MD


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

Clicking this button will bring the Editor to a new *Add/Edit External Correspondence* page. Editors may set the date and time (US Eastern Time) of the correspondence, enter a Description for the correspondence (a required field), and also the sender (‘From’) and recipient (‘To’) of the letter, the subject line, and the contents of the letter.

Add External Editorial Correspondence

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

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

* Correspondence Date:  (mm/dd/yyyy) Time: Hour: Minute: AM/PM: (US Eastern Time)

* Description:

From:

To:

Letter Subject:

Letter Contents: [Insert Special Character](#)

Clicking the 'Submit' button saves this letter and adds it to the *History* page of the submission, inserted into the list chronologically. The text '(External)' displays next to the letter link identifying this letter as External Correspondence. This correspondence is then visible to all users with the existing 'View Editorial Correspondence History' permission enabled. Editors with the 'Add/Edit External Correspondence' permission may also Remove or Edit these external correspondence items, if desired.

NOTE: PM users with 'View Submission Production Correspondence History' permission enabled and the new 'Add/Edit External Correspondence' permission may also add Production Correspondence. See the 'Add External Correspondence to Submission Production Correspondence History' section of this document for more information.

**History for DOI: Unassigned
Anthony Author (UNITED STATES): "Migratory patterns of Tree Frogs"**

[Status History](#) [Correspondence History](#)

[Switch to Status Type View](#)

Close

STATUS HISTORY

Status Date	Document Status	Production Status	Status Days	Role Family	Revision	Operator
Jul 14 2009 10:48AM	Received by Journal		----	EDITOR	0	Anthony Author, MD
Jul 14 2009 10:48AM	Needs Approval		----	AUTHOR	0	Anthony Author, MD
Jul 14 2009 10:47AM	Building PDF		----	AUTHOR	0	Anthony Author, MD
Sep 9 2005 4:41PM	Incomplete		1404	AUTHOR	0	Anthony Author, MD

CORRESPONDENCE HISTORY

Add Editorial Correspondence

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Jul 14 2009 11:06AM	Verify Editor Availability (External) Remove Edit				Mary François Smith, PhD
Jul 14 2009 10:48AM	Journal Office Notice New Submission	Geraldine Ferraro	Received by Journal	0	Anthony Author, MD
Jul 14 2009 10:48AM	Journal Office Notice New Submission	Mary François Smith, PhD	Received by Journal	0	Anthony Author, MD
Jul 14 2009 10:48AM	Author Submits New Manuscript Confirmation	Anthony Author, MD	Received by Journal	0	Anthony Author, MD
Jul 14 2009 10:48AM	None	Anthony Author, MD	Building PDF	0	Anthony Author, MD

Close

[Status History](#) [Correspondence History](#)

[Switch to Status Type View](#)

The Editor may also use the External Correspondence feature to note that a phone call was received, such as an Author calling to check on the status of a submission. In this example, the Editor could use the ‘Add Editorial Correspondence’ button, and simply enter a Description of ‘Phone: Status Query from Author’, and the date/time of the call to record it.

TO CONFIGURE:

In RoleManager, select the Editor Roles to be granted the new ‘Add/Edit External Correspondence’ permission. Enable the new permission to allow Editors to add External Correspondence into EM/PM. Note that the Editor Role must also have the existing ‘View Editorial Correspondence History’ permission enabled.






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
 - Share Saved Searches
 - View Linked Submission Groups
 - Create/Edit Linked Submission Groups
 - Set Active/Inactive Status on Linked Submission Groups
 - Search Similar Articles in MEDLINE
 - Search Author Publications in MEDLINE
 - Initiate CrossCheck
 - View Editorial Status History
 -  View Submission Production Status History
 -  View Submission Production Task Assignment History
 -  View Schedule Group Production Task Assignment History
 - View Editorial Correspondence History
 -  View Submission Production Correspondence History
 -  View Schedule Group Production Correspondence History
 - Add/Edit External Correspondence
 - View All Submissions
 - View Completed Reviews Grid in Main Menu
 - View Additional Manuscript Details
 - Edit Additional Manuscript Details
 - View Notes on Manuscript Details
 - Edit Notes on Manuscript Details
 - Turn On Manuscript Notes Flag



The second drop-down lists all Item Types configured for the selected Article Type.

A button labeled “Change Now” appears to the right of the dropdowns but is disabled until both a file type and Item Type have been selected.

Selecting Item Type

New Submission

[Frequently Asked Questions](#)

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- Select Section/Category
- Submit Abstract
- Enter Keywords
- Select Classifications
- Enter Comments
- 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 Figure

Enter a Description. Select Online Web System or Offline delivery. If Online Web System is selected, click the Browse button to select a file, then click the Attach This File button. If Offline is selected, click the Attach This Information button.

Description

Delivery Method Online Web System Offline

File Name:

The order in which the attached items appear in the list will be the order in which they appear in the PDF file that is produced. You can re-order the items and click the 'Update File Order' button to effect the change.

Change Item Type of all .jpg files to:

Order	Item	Description	File Name	Size	Last Modified	Actions
1	*Manuscript <input type="checkbox"/>	Data Tracking Study	MS12252009.doc	28.5 KB	2009-06-24 13:31:16	Download Remove
2	Choose <input type="checkbox"/>	<input type="text"/>	Figure1.jpg	37.1 KB	2009-06-24 13:31:16	Download Remove
3	Choose <input type="checkbox"/>	<input type="text"/>	Figure2.jpg	37.1 KB	2009-06-24 13:31:19	Download Remove
4	Choose <input type="checkbox"/>	<input type="text"/>	Figure3.jpg	37.1 KB	2009-06-24 13:31:09	Download Remove
5	Choose <input type="checkbox"/>	<input type="text"/>	Figure4.eps	456.1 KB	2009-06-24 13:31:16	Download Remove
6	Choose <input type="checkbox"/>	<input type="text"/>	Figure5.eps	456.1 KB	2009-06-24 13:31:13	Download Remove
7	Choose <input type="checkbox"/>	<input type="text"/>	Figure6.eps	456.1 KB	2009-06-24 13:31:14	Download Remove
8	Choose <input type="checkbox"/>	<input type="text"/>	Figure7.eps	456.1 KB	2009-06-24 13:31:14	Download Remove
9	Choose <input type="checkbox"/>	<input type="text"/>	Figure8.eps	456.1 KB	2009-06-24 13:31:14	Download Remove
10	Choose <input type="checkbox"/>	<input type="text"/>	Figure9.eps	456.1 KB	2009-06-24 13:31:14	Download Remove
11	Choose <input type="checkbox"/>	<input type="text"/>	Figure10.eps	456.1 KB	2009-06-24 13:31:15	Download Remove

Once the user has selected both a file type and an Item Type, the 'Change Now' button is enabled. The user then clicks the button, and the selected Item Type is applied to all files with the selected file type.

All files with .jpg extension have Item Type set to Figure

New Submission

[Frequently Asked Questions](#)

- [Select Article Type](#)
- [Enter Title](#)
- [Add/Edit/Remove Authors](#)
- [Select Section/Category](#)
- [Submit Abstract](#)
- [Enter Keywords](#)
- [Select Classifications](#)
- [Enter Comments](#)
- [Attach Files](#)

Please Attach Files [Insert Special Character](#)

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

Item:

Enter a Description. Select Online Web System or Offline delivery. If Online Web System is selected, click the Browse button to select a file, then click the Attach This File button. If Offline is selected, click the Attach This Information button.

Description:

Delivery Method: Online Web System Offline

File Name:

The order in which the attached items appear in the list will be the order in which they appear in the PDF file that is produced. You can re-order the items and click the 'Update File Order' button to effect the change.

Change Item Type of all files to:

Order	Item	Description	File Name	Size	Last Modified	Actions
1	*Manuscript	Data Tracking Study	MS12252009.doc	28.5 KB	2009-06-24 13:31:16	Download Remove
2	Figure		Figure1.jpg	37.1 KB	2009-06-24 13:31:16	Download Remove
3	Figure		Figure2.jpg	37.1 KB	2009-06-24 13:31:19	Download Remove
4	Figure		Figure3.jpg	37.1 KB	2009-06-24 13:31:09	Download Remove
5	Choose		Figure4.eps	456.1 KB	2009-06-24 13:31:16	Download Remove
6	Choose		Figure5.eps	456.1 KB	2009-06-24 13:31:13	Download Remove
7	Choose		Figure6.eps	456.1 KB	2009-06-24 13:31:14	Download Remove
8	Choose		Figure7.eps	456.1 KB	2009-06-24 13:31:14	Download Remove
9	Choose		Figure8.eps	456.1 KB	2009-06-24 13:31:14	Download Remove
10	Choose		Figure9.eps	456.1 KB	2009-06-24 13:31:14	Download Remove

Users may use this feature to change the Item Type for a given file format as many times as necessary, and they may also change any individual item manually, if desired.

TO CONFIGURE:

There is no configuration required to use this feature. This is available upon upgrading to version 7.2 for all users when initiating or editing a submission.

Associating a Custom Flag with an Additional Manuscript Details field

In EM/PM version 7.1, custom flags are configured by the publication and turned on or off using the 'Add/Edit Submission Flags' link on a *Details* or *Production Details* page. The flags are used as visual cues, but not linked with any other information in the system.

New in version 7.2, the custom flag functionality is enhanced so that administrators may associate an individual Custom Flag with a selected Additional Manuscript Detail field. Once the association is established, when the Additional Manuscript Detail field is displayed to an Editor or Publisher, the system will display a checkbox allowing the user to turn the Custom Flag on or off (depending on the user's enabled permissions).

The Additional Manuscript Detail fields and Custom Flags remain functionally independent of each other, in that a Custom Flag can still be controlled via the existing 'Add/Edit Submission Flags' link. This setting is designed to display the two items together when displaying the Additional Manuscript Details field, allowing users to quickly set or clear (turn on/off) a flag whenever they edit a particular Additional Manuscript Detail field.

This new feature enhances the display of the Additional Manuscript Detail fields on the main *Additional Manuscript Details* page, accessed via the 'Add/Edit Additional Manuscript Details' link on *Details* and *Production Details* pages:

Additional Manuscript Details for Manuscript Number JXYZ47
"Testing the 4.0-04-2a spec"

Cancel Save and Close

Publish with	<input type="text"/>	Display 'Publish with' Flag: <input type="checkbox"/> Help
Schedule type	Fast-Track	Display 'Fast Track' Flag: <input checked="" type="checkbox"/>
MS Editor	Please Choose: <input type="button" value="v"/>	Display 'News and Views' Flag: <input checked="" type="checkbox"/>
News and Views ready date	24 August 2008	Display 'Production Note Alert!!' Flag: <input checked="" type="checkbox"/>
Number of Widgets	<input type="text"/>	
Special Office Notes	<input type="text"/>	

Cancel Save and Close

The way Additional Manuscript Detail fields are displayed on a Custom Details Page layout is also enhanced with the new functionality:

**Details for Manuscript Number: JXYZ47, DOI: Unassigned
Arthur Author (UNITED KINGDOM): "Testing the 4.0-04-2a spec"**

[Cancel](#) [Save and Close](#)

[Production Status](#) [Select Submissions Flags](#) [Manuscript Notes](#) [Custom Fields](#)

Additional Manuscript Details: [Add/Edit Additional Manuscript Details](#)

DOI:

Full Title: Testing the 4.0-04-2a spec

Short Title:

Corresponding Author: [Arthur Author, Aries](#)
Oxford, UNITED KINGDOM [\[Proxy\]](#)

Corresponding Author E-Mail: [artauth@aristotle.ac.uk](#)

⋮

Custom Fields

Publish with	<input type="text"/>	Display 'Publish with' Flag: <input type="checkbox"/>
Schedule type	Fast-Track	Display 'Fast Track' Flag: <input checked="" type="checkbox"/> Help Top
MS Editor	Please Choose: <input type="text"/>	Display 'News and Views' Flag: <input checked="" type="checkbox"/>
News and Views ready date	24 August 2008	Display 'Production Note Alert!!' Flag: <input checked="" type="checkbox"/>
Number of Widgets	<input type="text"/>	
Special Office Notes	<input type="text"/>	

[Cancel](#) [Save and Close](#)

When a Flag is turned on, it will display next to the 'Details' action link in the same way Flags display today. This functionality is unchanged in version 7.2:

View All Assigned Submissions - Mary François Smith, PhD

Contents: This page lists all submissions that have been assigned to an Editor, for which the Editor's decision has not yet been made, review, submissions requiring a decision, and submissions which have a subordinate Editor's decision but not a decision from the top Editor.

Page: 1 of 1 (47 total submissions)

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Stat Date
View Submission Details ! History Classific Fast Track Unassign Editor File Inventory Edit Submission Invite Reviewers Solicit Commentary Notify Editor View Reviews and Comments Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail	DEMO-D-04-00095	Original Study		Migratory Flight Patterns: Canada Geese and Later Seasonal Disorders	Kevin M. Carlson	Nov 19 2003 4:51PM	Aug 2009 11:11

NOTE: Only Editor or Publisher roles that are configured with either or both RoleManager permissions 'Turn On Submission Flags' and 'Turn Off Submission Flags' will see the checkboxes. If a user's Role has only the 'Turn On Submission Flags' permission, then when a Flag is associated with an Additional Manuscript Detail field, they will see a checkbox only when the Flag is not currently set to display (flag is 'Off'), allowing them to turn the flag on:

Additional Manuscript Details for Manuscript Number JXYZ47
"Testing the 4.0-04-2a spec"

Publish with	<input type="text"/>	Display 'Publish with' Flag: <input type="checkbox"/> Help
Schedule type	Normal <input type="button" value="v"/>	
MS Editor	Please Choose: <input type="button" value="v"/>	
News and Views ready date	<input type="text"/> <input type="button" value="calendar"/> (mm/dd/yyyy)	Display 'News and Views' Flag: <input type="checkbox"/>
Number of Widgets	<input type="text"/>	
Special Office Notes		
<input type="text"/>		

If the user's Role has only the 'Turn Off Submission Flags' permission, and a flag is associated with an Additional Manuscript Details field, they will only see a checkbox if the associated flag is currently 'On', allowing them to turn the flag off:

Additional Manuscript Details for Manuscript Number JXYZ47
"Testing the 4.0-04-2a spec"

Publish with	<input type="text"/>	Help
Schedule type	Normal <input type="button" value="v"/>	Display 'Fast Track' Flag: <input checked="" type="checkbox"/>
MS Editor	Please Choose: <input type="button" value="v"/>	
News and Views ready date	<input type="text"/> <input type="button" value="calendar"/> (mm/dd/yyyy)	Display 'News and Views' Flag: <input checked="" type="checkbox"/>
Number of Widgets	<input type="text"/>	
Special Office Notes		
<input type="text"/>		

TO CONFIGURE:

Associating a Custom Flag with an Additional Manuscript Detail field is driven from the existing Custom Flag configuration. Go to PolicyManager, Create Customized Flags: the system will display the details of any links to Additional Manuscript Detail fields already configured (NOTE: There are no configurations on upgrade as this is a new feature):

Order	Flag	Flag Name	Associated with Additional Manuscript Details Field
1	!	Fast Track	Schedule Type Remove Edit
2	■	Supplementary Information	News and Views Ready Date Remove Edit
3	⦿	News and Views	Publish With Remove Edit
4	?	Publish with	Special Office Notes Remove Edit
5	?	Production Note Alert!!	

When Adding or Editing a Custom Flag, a new 'Associate with Additional Manuscript Details Field' drop-down on the *Edit Customized Flag* page allows you to link the Flag to the selected Additional Manuscript Detail field. Once linked to a Flag, the Additional Manuscript Detail field will not be available for linking to other flags; only one Flag can be linked to each Additional Manuscript Detail field:

Associate with Additional Manuscript Details Field:

When configuring Additional Manuscript Detail fields, the *Add/Edit Additional Manuscript Detail Fields* page also displays the details of any Custom Flags that a field is linked to:

Add/Edit Additional Manuscript Detail Fields

Listed below are the Additional Manuscript Detail Fields added for your journal. The values for these fields are entered manually on the Additional Manuscript Details page or the Transmittal Form, or can also be added to Custom Details Page layouts. If a Custom Flag has been configured to be Associated with an Additional Manuscript Detail field, an option to turn that Flag on or off will also appear next to the field.

Order	Description
1	Publish with
2	Schedule type
3	MS Editor
4	News and Views ready date
5	Number of Widgets
6	Special Office Notes

Associated with Flag	Actions
? Publish with	Remove Edit
! Fast Track	Remove Edit
● News and Views	Remove Edit
? Production Note Alert!!	Remove Edit

[Back to PolicyManager](#)

This is for information only, as you cannot link an Additional Manuscript Detail field to a Custom Flag when adding or editing the Additional Manuscript Details; you must set up the link by configuring the Custom Flag.

Enhanced Unavailability Functionality

EM/PM allows users to enter “Unavailable Dates” that can then be taken into account when users assign Editors, invite Reviewers, or invite Authors. Users enter dates for which they are not available, and provide a short reason for their unavailability. New in version 7.2, this feature is enhanced to allow users to provide more information about their unavailability.

New in version 7.2, in addition to the Start Date and End Date, users are able to enter a longer Reason for their unavailability as well as up to three substitutes who may be contacted for assistance in the user’s absence. These substitutes are not automatically contacted by the system, but may be contacted at the discretion of the assigning Editor.

Publications may also customize the instructions that display on the ‘Add/Edit Unavailable Date’ page to ask users for more information. For example, some publications may want specific information provided in the ‘Reason’ field when Unavailable Dates are entered. Customizable instructions enable the Publication to request this information from users.

Add Unavailable Date

Please enter the dates that you are unavailable. This information will be taken into consideration when your assistance is desired. You may also enter details of up to three people who the publication may contact in your absence.

Please Enter the Following

[Insert Special Character](#)

Start Date: (mm/dd/yyyy)

End Date: (mm/dd/yyyy)

Reason:

Substitute Information

First Substitute Name:

First Substitute E-mail:

Second Substitute Name:

Second Substitute E-mail:

Third Substitute Name:

Third Substitute E-mail:

The way EM/PM saves the dates is also enhanced. In the past, users who wanted to reflect one day of unavailability had to enter an ‘End Date’ as the day following the ‘Start Date’. New in version 7.2, users may enter the same date as the ‘Start Date’ and ‘End Date’ to reflect one day of unavailability. If the next day is entered as the ‘End Date’, then that will now be recorded as a two-day unavailability.

EM/PM will continue to display an “unavailable” link for any unavailable users when searching for an Author or Reviewer to invite, based on the publication’s ‘Set Check Unavailability’ date range configuration.

Sample of Invite Reviewer with Unavailable link:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ron Reviewer, MD (Reviewer) Unavailable Publication: Alternate Reviewer for 1 other submission	Yes	0 Class matches with MS	Review Compl Un-inv Termi Last R Last R Last R Avg D Manus Review
People Notes: This is a very important reviewer who requires few reminders.						

Clicking on the link now opens an enhanced version of the “Unavailability Information” pop-up, where the substitute information is displayed in addition to the unavailable dates and reason.
 NOTE: The dates display in the publication-selected format.

Date format displays per publication configuration:

Start Date	End Date	Reason	First Substitute Name	First Substitute E-mail	Second Substitute Name	Second Substitute E-mail	Third Substitute Name	Third Substitute E-mail
Jul 24 2009 12:00AM	Aug 07 2009 11:59PM	Traveling in Iowa and Minnesota	Laurel Quinn	lquinn@mail.com	Mica Turner	mica.turner@oxford.edu		
Sep 25 2009 12:00AM	Oct 09 2009 11:59PM	Research Project - I will be available for quick questions but will not have time for work-intensive assignments. Please contact the following substitutes for more extensive information or assignments. I will provide them with access to my resources as appropriate. Please copy both Sandy and Lord Peter in assignments, but Sandy will serve as the primary contact.	Sandy Brandybuck	SandyBrandy@hotmail.com	Peter D. B. Wimsey	LordPeter@yahoo.com		

Close

TO CONFIGURE:

Go to PolicyManager and click the [Configure Unavailability Check and Instructions](#) link (formerly called [Set Check Unavailability](#)).

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
 - [Set Manuscript Number Type](#)
 - [Set Manuscript Number Revision Suffix](#)
 - [Set Date Format](#)
 - [Set ISO Country Standard](#)
 - [Configure Unavailability Check and Instructions](#)
 - [Configure General Due Date Preferences](#)
 - [Set Reviewer Due Date Preferences](#)
 - [Set Editor Deep Link Expiration](#)
 - [Define Details Page Layouts](#)
 - [Set Update Information Deep Link Expiration](#)
 - [Create Customized Flags](#)
 - [Edit Production Notes Instructions](#)
 - [Edit Alternate Contact Notes Instructions](#)
 - [Customize Author Main Menu Instructions](#)
- ☒ Linked Submissions Policies

Use this page to set the ‘Set Check Unavailability’ date (existing functionality) and also to customize the instructions that appear on the *Add/Edit Unavailable Date* page (new functionality).

Default instructions displayed:

Configure Unavailability Check and Instructions

Set Check Unavailability

When a user is invited or assigned a task, a check is made to see if that person is scheduled to be unavailable. Enter the amount of time in days you would like to have checked from the date of assignment. A value of zero ("0") means that the unavailability will only be checked for the date the assignment is created.

Number of days to check:

Edit Unavailable Dates Instructions

Enter any instructions that you would like to appear when Unavailable Dates are being added or edited.

[Insert Special Character](#)

Please enter the dates that you are unavailable. This information will be taken into consideration when your assistance is desired. You may also enter details of up to three people who the publication may contact in your absence.

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

Enhanced Unavailability Information when Assigning Editors

In EM/PM version 7.1, when assigning an Editor, the ‘Set Check Unavailability’ date is checked to determine the availability of all Editors in the configured timeframe. A column would display that indicated whether each Editor was available during the publication’s configured date check range with a plain text ‘Yes’ or ‘No’. If an unavailable Editor was chosen for the assignment, then upon proceeding with the assignment, a warning page would display the Editor’s unavailable date range and reason, and would ask the user to confirm that they wished to assign the paper to that Editor.

New in version 7.2, the Unavailable link is added to the Editor selection pages for the Assign, Switch and Redirect processes, and the subsequent warning/confirmation page is removed to streamline the process. If an Editor has Unavailable dates configured within the publication’s defined ‘Set Check Unavailability’ timeframe, then the Unavailable link will display in the ‘Available during...’ column.

Assign Editor

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

Manuscript Number:
INFORM-2009-12

Title: The Semantic Web in Popular Culture

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

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

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Editor	Rose Cooper	0	0		Yes
<input type="radio"/>	Editor	Boulder Meapa	0	0		Yes
<input type="radio"/>	Editor	Laurel Quinn	0	0		Yes
<input type="radio"/>	Editor	Slate Stoneschild, Ph.D.	1	0		Yes
<input type="radio"/>	Editor	River Took	1	0		Unavailable
<input type="radio"/>	Editor	Onyx Valentine	2	0		Yes
<input type="radio"/>	Managing Editor	Oriole Tucker	0	0		Yes

Clicking the Unavailable link opens the enhanced *Unavailability Information* pop-up page, displaying the relevant Unavailable Date entries for the Editor.

Unavailability Information								
Start Date	End Date	Reason	First Substitute Name	First Substitute E-mail	Second Substitute Name	Second Substitute E-mail	Third Substitute Name	Third Substitute E-mail
Jul 24 2009 12:00AM	Aug 07 2009 11:59PM	Traveling in Iowa and Minnesota	Laurel Quinn	lquinn@mail.com	Mica Turner	mica.turner@oxford.edu		
Sep 25 2009 12:00AM	Oct 09 2009 11:59PM	Research Project - I will be available for quick questions but I will not have time for work-intensive assignments. Please contact the following substitutes for more extensive information or assignments. I will provide them with access to my resources as appropriate. Please copy both Sandy and Lord Peter on assignments, but Sandy will serve as the primary contact.	Sandy Brandybuck	SandyBrandy@hotmail.com	Peter D. B. Wimsey	LordPeter@yahoo.com		

NOTE: This page is an enhanced version of the *Unavailable Reason* page. This new page also

displays when selecting Reviewers or inviting Authors where those users have Unavailable Date information that falls into the publication's 'Set Check Unavailability' date range.

TO CONFIGURE:

No configuration is required for the display of the Unavailable link on the Assign Editor page. To configure the 'Set Check Unavailability' date, go to PolicyManager and click the Configure Unavailability Check and Instructions link (formerly called Set Check Unavailability).

Support for Unicode Characters in E-Mail

Prior to EM/PM version 7.2, all E-mail messages were sent in a text format with a limited character set, because not all E-mail clients could support Unicode characters. E-mail clients have advanced to the point where the majority can support Unicode; therefore, an option has been added to EM/PM to allow all E-mail letters to be sent in a format which allows Unicode characters to be included in the E-mail.

- This option applies to all E-mail sent from the system.

The majority of modern E-mail clients will receive and process the Unicode characters properly. In rare cases, some Unicode characters may not be properly interpreted by the E-mail client, and may appear in the E-mail as ‘replacement’ characters such as question marks or rectangles, or the entire E-mail body may be turned into an E-mail attachment. To avoid these problems, a more up-to-date E-mail client may be required.

In addition, to properly view some Unicode characters, the appropriate fonts must be installed on the user’s computer.

TO CONFIGURE:

This feature is not automatically enabled at upgrade. If you wish to have this feature enabled for your publication, please contact your Aries account coordinator.

Support for Unicode Characters in downloaded reports

Prior to EM/PM Version 7.2, both the custom reports and General Data Export features allowed the user to download a tab-delimited results file, suitable for importing into Excel or other reporting tools. These files were created in a non-Unicode text format, and Unicode characters did not appear in these files.

EM/PM version 7.2 is enhanced to allow the user to download the report results file in the standard format (the same format as pre-version 7.2), or in Unicode (UTF-8) format. When the user has elected to create an extraction file for download, a new [Download file in Unicode format \(UTF-8\)](#) link will automatically appear on the report results page. Clicking this link will download a file containing the report results, including any Unicode characters that occur in the results.

Search Results for

SELECT Accepted Invitations, Author Invitation Stats ID, Average Days Completed Late, Average Days to Complete, Average Days to Respond, Average Reminder Count, Invited Submissions Completed, Completed Late, Completed On Time, Date Last Accepted, Date Last Completed, Date Last Declined, Declined Invitations, Invitations Outstanding, Invited Submissions in Progress, People Unique ID, Total Invitations, Uninvited After Accepting, Uninvited Before Responding FROM AUTHOR_INVITATION_STATS WHERE (Total Invitations > N'2')

[Click here for more Help about this table](#), or click on a column header for help on a particular field.

There are 13 records in this selection.

[Download](#) the data file.

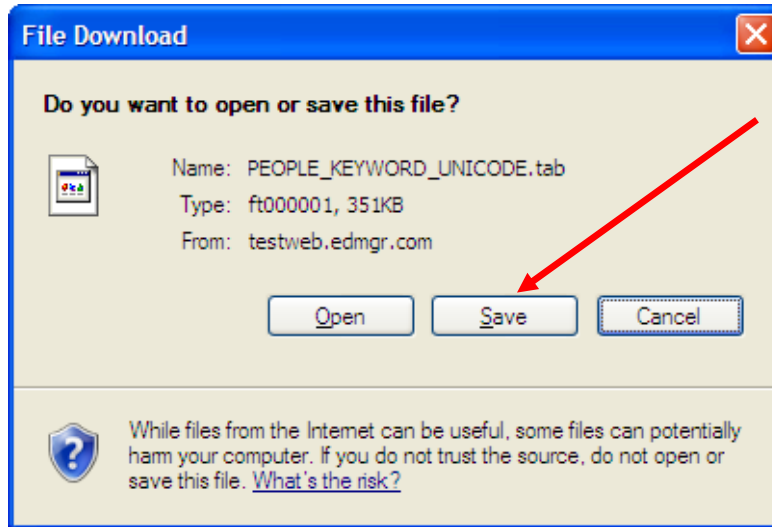
 [Download the data file in Unicode format\(UTF-8\).](#)

[Search Again](#)
[Back to Reports](#)
[Back to Main Menu](#)

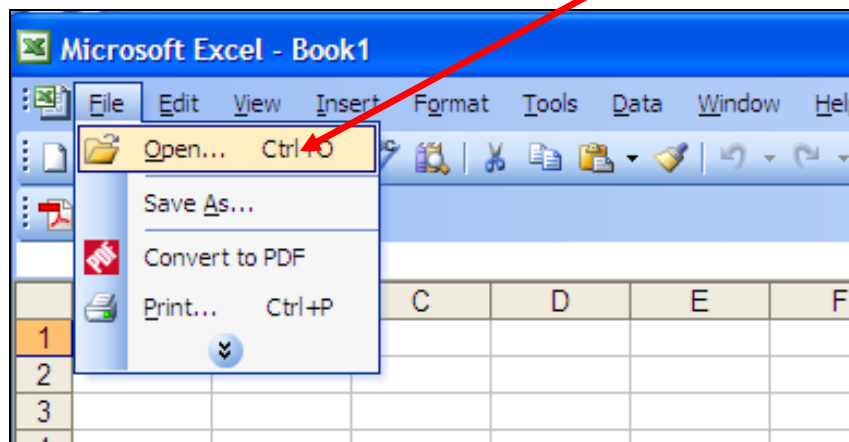
NOTE: To open the file in Excel, Excel's File Open menu must be used, followed by selecting 'tab' as the delimiter for the file. Do not double click the file to automatically open the Excel application. Opening the file by double clicking may result in the Unicode characters not displaying properly.

Procedure for Excel 2003:

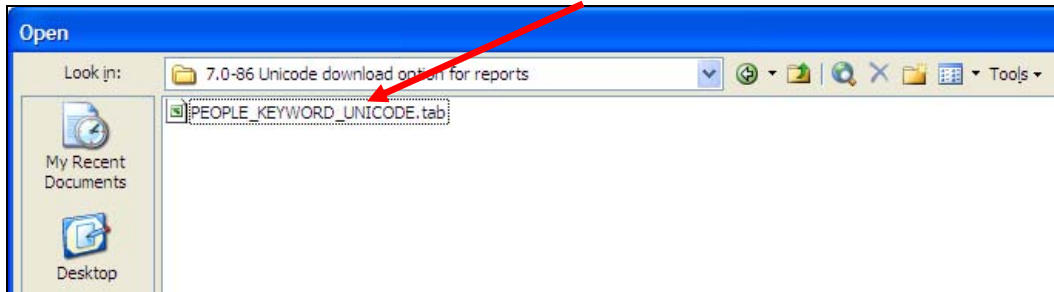
1. In Editorial Manager, after clicking 'Download the data file in Unicode format – UTF-8', click the 'Save' button in the browser dialog box once the file has been prepared, and make a note of where you save the file. NOTE: The appearance of this dialog box depends on the browser.



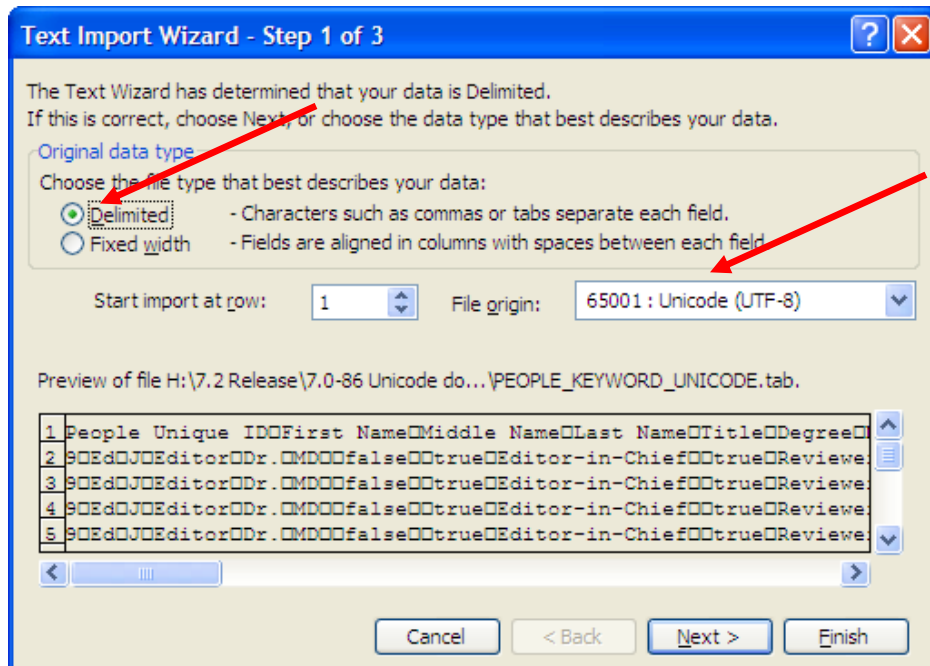
2. Open the Excel application.
3. Click 'File', then 'Open' from the Excel 2003 menu, or the 'File Open' icon:



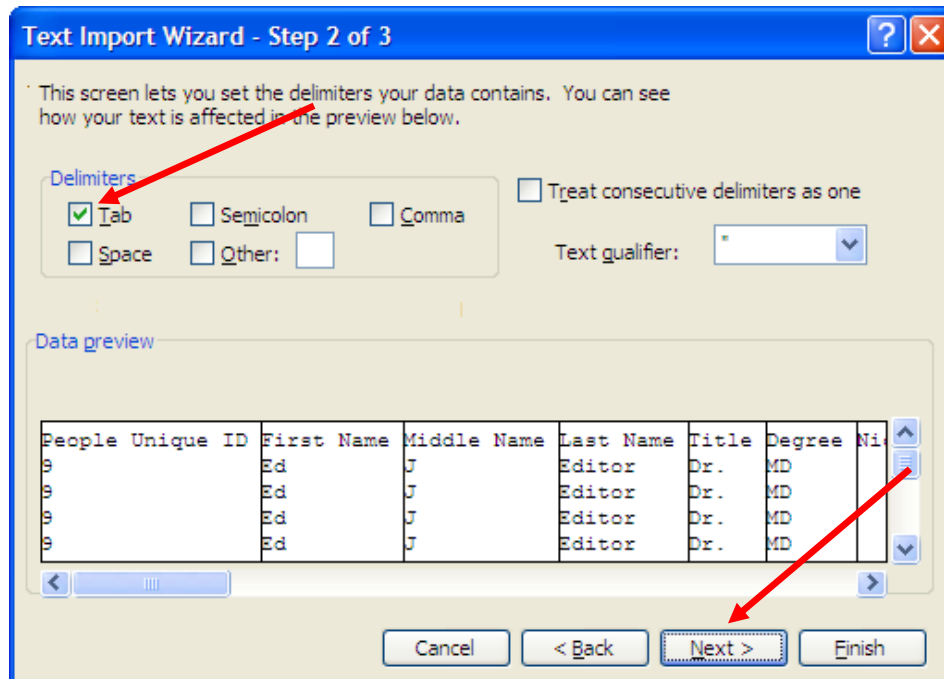
4. Browse to the file (where you just saved it), and click to open it.



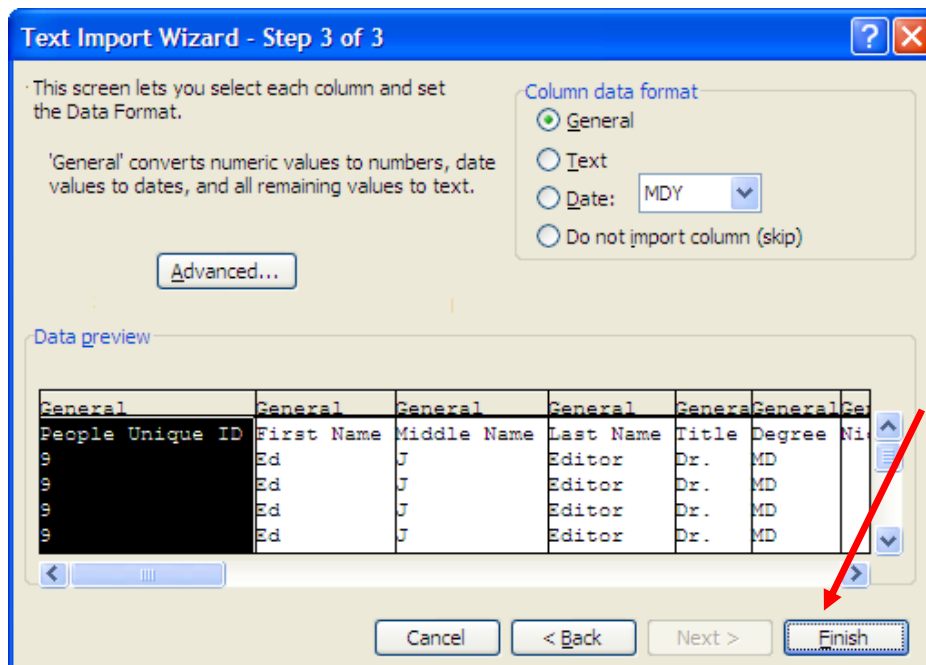
5. The text import wizard should appear in Excel. Choose 'Delimited'. Note that the 'File Origin' reflects UTF-8.



- In Step 2 of the Text Import Wizard, select 'Tab', then click the 'Next' button.



- In Step 3 of the Text Import Wizard, click the 'Finish' button.

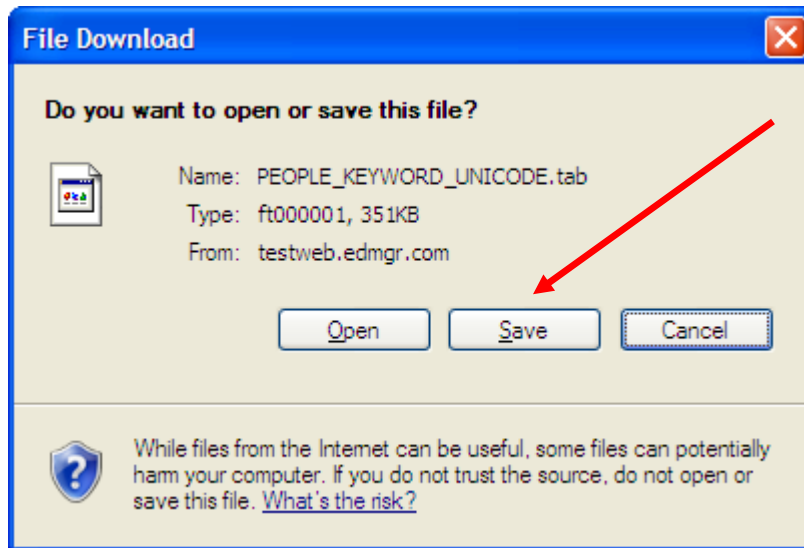


8. The Unicode characters should now display appropriately:

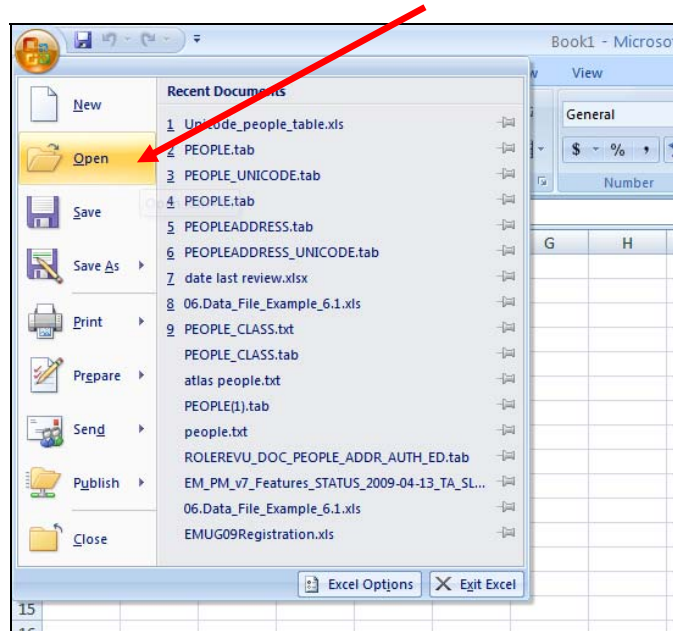
	A	B	C	D	E	F	G	H	I	J
1	People Unique ID	First Name	Middle Name	Last Name	Title	Degree	Nickname	Person is a Publisher	Publisher Role	Person an Editor
2	193	キョウイウ		キョウイウ	Dr	PhD		FALSE		FALSE
3	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
4	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
5	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
6	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
7	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
8	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
9	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
10	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
11										
12										
13										

Procedure for Excel 2007:

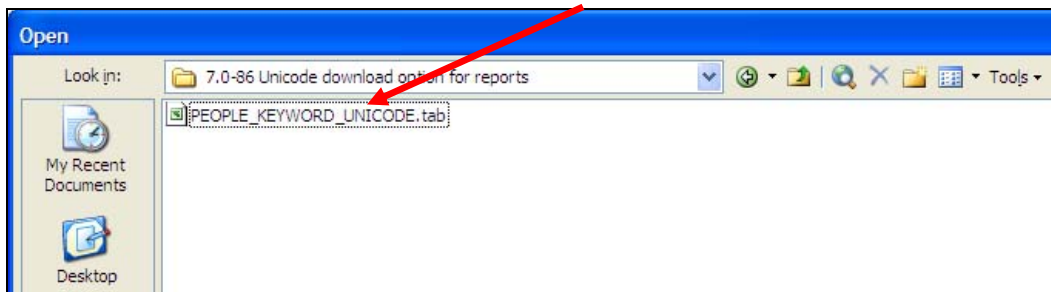
1. In Editorial Manager, after clicking ‘Download the data file in Unicode format – UTF-8’, click the ‘Save’ button in the browser dialog box once the file has been prepared, and make a note of where you save the file. NOTE: The appearance of this dialog box depends on the browser.



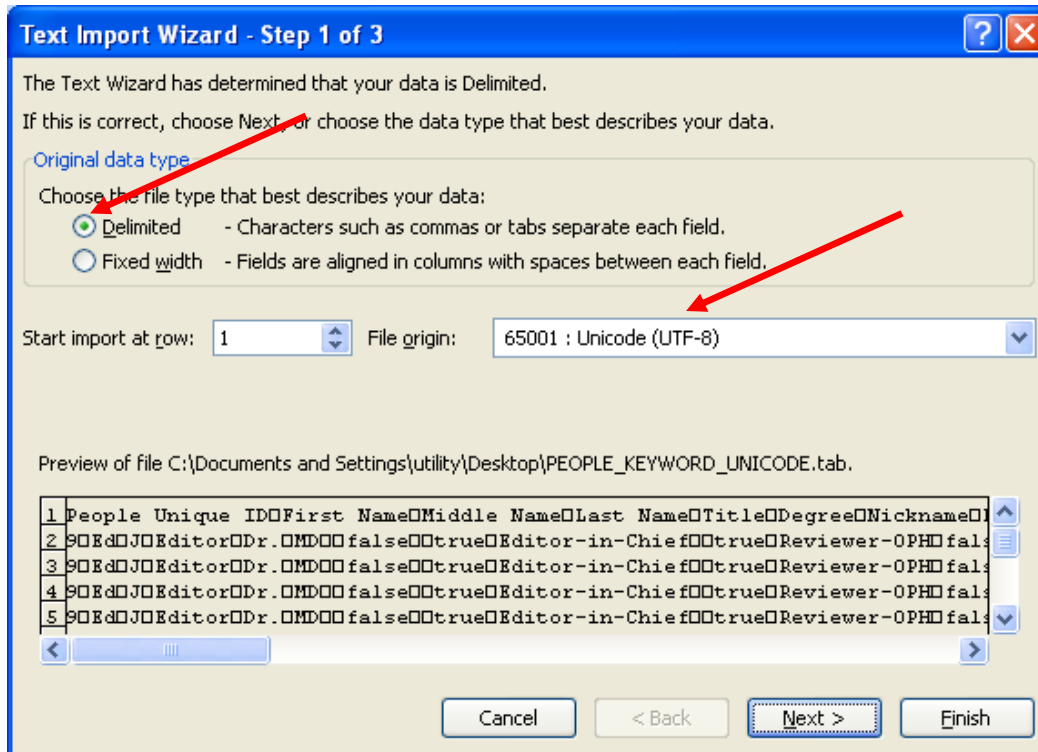
2. Open the Excel 2007 application.
3. Click the 'Office Button' in the upper left corner, then 'Open' from the Excel 2007 menu, or the 'Open' icon in the Quick Access Toolbar (if configured):



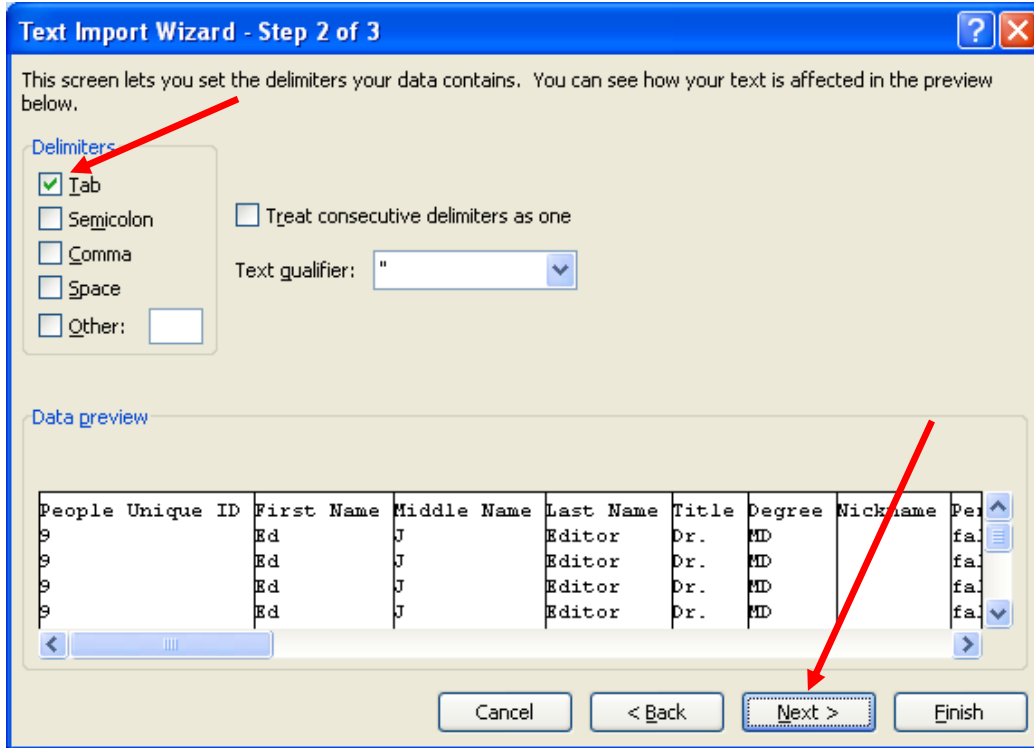
4. Browse to the file (where you just saved it), and open it.



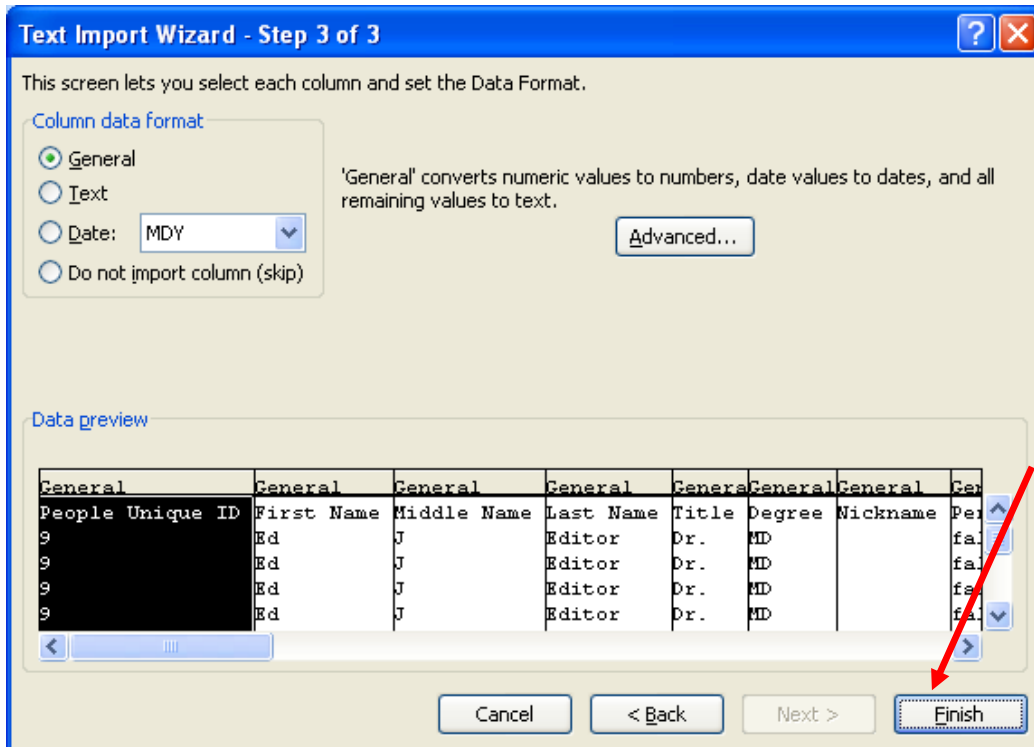
- The text import wizard should appear in Excel. Choose 'Delimited'. Note that the 'File Origin' reflects UTF-8.



6. In Step 2 of the Text Import Wizard, select 'Tab', then click the 'Next' button.



7. In Step 3 of the Text Import Wizard, click the 'Finish' button.



8. The Unicode characters should display appropriately:

	A	B	C	D	E	F	G	H	I	J
1	People Unique ID	First Name	Middle Name	Last Name	Title	Degree	Nickname	Person is a Publisher	Publisher Role	Person an Editor
2	193	キョウイツイ	キョウイツイ	キョウイツイ	Dr	PhD		FALSE		FALSE
3	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
4	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
5	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
6	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
7	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
8	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
9	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
10	9	Ed	J	Editor	Dr.	MD		FALSE		TRUE
11										
12										
13										

TO CONFIGURE:

No configuration is needed. The new link will appear automatically for all custom report results and General Data Export results pages, as long as the user has elected to create an extraction file for download.

New Item Added to the Journal Accountability Report

Prior to EM/PM version 7.2, the Journal Accountability Report (JAR) results page displayed a calculation for 'New Manuscripts Received' in the 'Submission Statistics' section of the page. This calculation was based on the Initial Date Submitted of the submissions. When a submission is sent back to the Author, and the Author resubmits, a new Initial Date Submitted is recorded in the database and used in the calculation. If the new Initial Date Submitted no longer falls into the date range selected by the user for the report criteria, the number shown in this result will be changed from one time period to the next.

- This report item is renamed 'New Manuscripts Received (by current Initial Date Submitted)' in EM/PM version 7.2. This makes it clearer to the user that the results may change over time, if submissions are sent back the Author and subsequently re-submitted. The underlying calculation, which uses the Initial Date Submitted, is unchanged.

A new item is added to the report, labeled 'New Manuscripts Received (by First Receipt Date).'

- This calculation is the same as the 'New Manuscripts Received (by current Initial Date Submitted)' except that it uses a new date field – First Receipt Date.
- The 'First Receipt Date' field is populated with the date/time when the submission is first approved by the Author and sent to the publication. Unless the submission is sent back to the Author, it will be the same as the Initial Date Submitted. However, if the submission is sent back to the Author and subsequently re-submitted, this new 'First Receipt Date' field remains unchanged.

In the following example, the JAR report is run for the month of August. Five submissions were received in August, but two were sent back to the Author and resubmitted in September (causing their Initial Date Submitted dates to be changed to September). Therefore, the 'New Manuscripts Received (by First Receipt Date)' shows 5 submissions, and the New Manuscripts Received (by current Initial Date Submitted) shows 3 submissions (the original 5, less the 2 sent back to the Author and resubmitted at a later date).

- Tip: if the submission has been sent back to the Author but not yet resubmitted, the Initial Date Submitted is not changed. It is changed only when the Author resubmits.

Journal Accountability Report

Summary of activity for the journal office between Aug 1 2008 12:00AM and Aug 31 2008 11:59PM.

This report was run Sep 23 2008 10:58AM.

[Submission/Revision Statistics](#)
 [Journal Turnaround Time](#)
 [Reviewer Statistics](#)
 [Decision Summary](#)
 [Correspondence History](#)

Submission Statistics

New Manuscripts Received (by First Receipt Date) <i>Bona Fide manuscripts submitted by Authors during the specified time period. This number may include submissions that have been removed by the journal office and manuscripts that have been submitted, but have not yet been assigned to an Editor.</i>	5
New Manuscripts Received (by current Initial Date Submitted) <i>Manuscripts submitted by Authors during the specified time period. This number may change if a submission is returned to the Author and resubmitted by the Author at a later date. In this case, the resubmission date is stored as the Initial Date Submitted, overwriting the original Initial Date Submitted. This number may include submissions that have been removed by the journal office and manuscripts that have been submitted, but have not yet been assigned to an Editor</i>	3
Submissions Removed by the Journal Office <i>Editorial staff may remove submissions from the system before an Editor is assigned. Manuscripts included in this category are also included in New Manuscripts Received above.</i>	0
Manuscripts Submitted but Technical Check Not Yet Complete <i>The manuscript was submitted during the time frame, but the technical check is not yet complete</i>	0

TO CONFIGURE:

No configuration is needed. The new and renamed report rows will appear automatically.

Placing ‘Quick Links’ to saved Searches on Main Menus

In EM/PM version 7.1, users could execute a Submission Search and then save a copy of the Search definition as a personal Search Definition. In order to use the saved Search Definition, they would need to return to the Search Submissions page to select and run the search.

New in version 7.2, the Save Search procedure has been enhanced to allow you to display a link to the search in the appropriate menus (searches saved under Search Submission appear only in Editorial and Production (if Production Tracking is enabled for your publication) Main Menus; searches saved under Search Proposals appear in the Proposal Main Menu). A new ‘Show this search in Main Menus’ checkbox displays when saving a search definition:

Save Search Criteria

A search name, All subs in News and Views already exists.
Check the provided checkbox and click the "Submit" button again to overwrite the existing search with this one. Alternatively, enter a new name for your saved search before proceeding.

Overwrite existing search?

Criteria	Search Criteria Name
Section/Category Name is containing 'news'	All subs in News and Views

Show this Search in Main Menus

Cancel Submit

[Back To Search Results Page](#)
[New Search](#)
[Editor Main Menu](#)
[Production Tasks Menu](#)
[Production Status Grid](#)

After saving a search with this option selected/set, the user will see a new ‘Quick Searches’ area in the sidebar of his or her main menu with links to any saved searches:

em Editorial Manager™

HOME • LOG OUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
 MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Go to: -- Select Publication --
 Role: Editorial Office Username: jmacjohn

Important Message: Site under development. Do not use for live manuscript submission.

Editorial Proposal Menu Production Tasks

Editorial Office Main Menu

Quick Searches:
[All subs in News and Views](#)

Submissions With:

0 Reviews Complete	1 Reviews Complete	2 Reviews Complete	3 Reviews Complete	4+ Reviews Complete
0	0	0	0	0

Search

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

Editor To-Do List

My Pending Assignments (88)

- [New Submissions Requiring Assignments](#) (82)
- Revised Submissions Requiring Assignments (0)
- [Submissions Needing Approval by Editor](#) (2)
- [Submissions Sent Back to Author for Approval](#) (1)
- [Incomplete Submissions](#) (3)
- Submissions with Required Reviews Complete (0)
- Submissions Requiring Additional Reviewers (0)
- Submissions with One or More Late Reviews (0)

Clicking a ‘Quick Search’ link immediately runs that search and displays the results, exactly as if the user had selected the saved Search Definition under Search Submissions and clicked the ‘Run Saved Search Definition’ button.

TO CONFIGURE:

No configuration is necessary. Any user with Search Submissions permission can save a search, and configure that search to appear in their main menus.

Note that searches saved under Search Submission appear only in Editorial and Production (if Production Tracking is enabled for your publication) Main Menus; searches saved under Search Proposals appear in the Proposal Main Menu.

Note that this feature can be combined with the new ‘Share Saved Searches’ feature (see Sharing Saved Search Definitions with Other Users, below), to allow a user to place a Quick Search link to a Shared Search definition on the Main Menu for the selected Editor Roles.

Sharing Saved Search Definitions with Other Users

In EM/PM version 7.1, each Saved Search definition is owned by a particular user, and cannot be used by any other user. If an administrator wanted to create a standard search that could be used by all of their Editors, they would have to proxy in for each Editor in turn and recreate the same search definition for each Editor.

This is enhanced in version 7.2 to allow any user with proper permissions to *share* any of their search definitions with selected Editor Roles. All Editors with those Roles will see the shared search definition in their Search Submission page, and can run that search:

Search submissions selection criteria

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#)

Search Definition: Choose Saved Search

[Remove Search Definition](#) [Edit Selected Search Definition](#) [Run Selected Search Definition](#)

[Help with Searching](#) [Insert Special Characters](#) [Advanced Criteria](#)

Criterion	Is/Is Not	Value
Manuscript Number	is	<input type="text"/>

[Clear](#) [Search](#) [Add](#)

Help With Searching

- 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.

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

Note that the Editor's own configured 'Search All Manuscripts' or 'Search Only Assigned Manuscripts' permissions will be applied to the search results.

Editors with whom the Search definition has been shared can then edit the Shared Search definition and make their own copy of it – they cannot replace the original definition. The defined Shared Search will always belong to the user who originally created it, and that is the only person that can edit the original search configuration.

If the Shared Search is configured to show on its creator's Main Menu (see the 'Placing 'Quick Links' to saved Searches on Main Menus' section of the release notes), then it will also appear in the Quick Searches section for all Editors with whom it is shared:

Editorial Office Main Menu

Quick Searches:

- [All Medical Submissions](#)
- [All Submissions with Copy-Editor](#)
- [All Submissions with Production Status X](#)

Submissions With:

0 Reviews Complete	1 Reviews Complete	2 Reviews Complete	3 Reviews Complete	4+ Reviews Complete
0	0	0	0	0

Search

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

Editor 'To-Do' List

My Pending Assignments (86)

- [New Submissions Requiring Assignments](#) (81)
- Revised Submissions Requiring Assignments (0)
- [Submissions Needing Approval by Editor](#) (2)

TO CONFIGURE:

Enable the new Editor RoleManager permission ‘Share Saved Searches’ to allow users with a specific role to share their searches.

Users granted this permission will see a new ‘Share Selected Search Definition’ button on the *Search Submissions Selection Criteria* page. Select the previously saved Search Definition that is to be shared, and click this button:

Search submissions selection criteria

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#).

Search Definition: Including Revisions

Remove Search Definition
Edit Selected Search Definition
Share Selected Search Definition
Run Selected Search Definition

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

	Criterion	Is/Is not	Selector	Value	
(▼	▼	▼	▼	▼
	Manuscript Number	is	Containing		
)					

Clear Search Add


Help With Searching

- 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.

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

Confidential – Subject to change – Copyright © 2009, Aries Systems Corporation
 NOT FOR USE OUTSIDE OF ARIES

47



This displays a new *Select Roles* page. Select each Role that you want to be able to run the Search you are Sharing, and click ‘Proceed’:

Note that the Editor Roles must also be configured with either the existing ‘Search All Manuscripts’ or ‘Search Only Assigned Manuscripts’ permissions before they can run any Shared Search, even those configured with ‘Show this Search in Main Menus’.

Under Search Submissions, the “recipient” Editors will see the Shared Searches appearing in the ‘Search Definition:’ drop-down, beneath a ‘--Shared Searches--’ separator:

If you share a search with your *own* Role (to allow other Editors with the same Role to access your search), it remains above this ‘--Shared Searches--’ separator, but is suffixed with the text ‘(shared)’ to indicate that you have shared this search with other Roles:

A Shared Search that is configured with ‘Show this Search in Main Menus’ will appear as a Quick Search link in the sidebar of each Editor’s main menu, but there is no special indicator to tell them that this is a link for a Shared Search.

Tip: When sharing searches that are configured with ‘Show this Search in Main Menus’, you need to take extra care to avoid a name that duplicates a user’s own search. Use ‘General Data Export’ under the ‘Reports’ area to view a list of all search definitions. Use the Selection Criteria to select records where the ‘Search Context Type ID’ is equal to 0:

If a user wishes to “unshare” a Search, the user would select the previously saved Search Definition from the ‘Search Definition’ drop-down and click the ‘Share Selected Search Definition’ button on the *Search Submissions Selection Criteria* page. The user will be brought to the *Select Roles* page where they would uncheck/unselect any previously selected Roles that were able to run the Search, and click the ‘Proceed’ button. The Search will be removed from the other users’ Search Definition drop-down menus.

Tip: Because Shared Searches are owned by a specific People Record, inactivating that person’s record would cause problems. Therefore, the system will prevent you from Inactivating a user record if they have Saved Searches which are shared with other Roles.

If you intend to use this feature to create a set of centrally controlled searches, it is recommended that you create a special ‘report creator’ Role with an associated login and give that Role permission to Search Submissions and to Share Saved Searches. This avoids any problems where an Editor Role is removed from an individual’s People Record, where that record owns Searches which are shared with other users.

The *Merge Duplicate Users* page now lets you know whether the selected People Records have shared any Searches:

Merge Duplicate Users - Verify Data

Please verify that the two people records you have selected are the records you want to merge. Then choose which people record will be retained, by clicking 'Combine and Keep this Record' in the appropriate box.

<p style="text-align: center;"><input type="button" value="Combine and Keep this Record"/></p> <p>Prof Editor B (EB-336) UNITED STATES edb@emtesting.co.uk</p> <p>Roles: Author, Editorial Office User has History? No User has Current Assignments? Yes User has Shared their Searches? Yes People Record Last Update Date: 05/07/2009</p> <p>Personal Classifications: This user has no personal classifications</p> <p style="text-align: center;"><input type="button" value="Combine and Keep this Record"/></p>	<p style="text-align: center;"><input type="button" value="Combine and Keep this Record"/></p> <p>Herr Editor C (EC-892) BAHAMAS ed-c@emtesting.co.uk</p> <p>Roles: Author User has History? No User has Current Assignments? No User has Shared their Searches? No People Record Last Update Date: 05/07/2009</p> <p>Personal Classifications: This user has no personal classifications</p> <p style="text-align: center;"><input type="button" value="Combine and Keep this Record"/></p>
---	--

Note the following things that occur when two people records are merged:

- Person assumes Username, Personal Classifications, and all Contact Information for the surviving record.
- The old address (e.g. possibly the address under which a manuscript was submitted) is no longer available for the person, and the surviving address is the address of record for all submissions under both people records.
- All history and current assignments are copied to the surviving record.

The record with the Shared Searches cannot be made Inactive, so you must choose to keep the record with the Shared Searches – if you try to keep the *other* record, the Merge will be prevented.

INTER-JOURNAL RESOURCE SHARING (IJRS) ENHANCEMENTS

Cross-Publication Statistics added to Reviewer Selection Pages

Prior to EM/PM version 7.2, the Reviewer Candidates grid on the Reviewer Selection pages displayed informational messages and review statistics from the publication being searched. Publications that are sharing Reviewers through the Inter Journal Resource Sharing (IJRS) feature require additional statistics related to Reviewer activity on all publications. These statistics are added in version 7.2 as described below.

For each Reviewer in the Reviewer Candidates grid, the system examines the Reviewer's activity on the publication on which the user is logged in (the 'home' publication). The system also examines publications that are sharing their reviewers with the home publication.

1. If the Reviewer is unavailable for the home publication, the Unavailable link will appear above any messages relating to the Reviewer's activity. Previously this link may have appeared in the midst of these messages.
2. If the Reviewer Candidate has review activity on the home publication, and the radio button "Search My Publication" has been selected, messages related to the Reviewer's activity may be displayed (such as **Reviewer Agreed**, or **Alternate Reviewer on 2 other submissions**). A new "**This publication:**", header is now displayed above these messages, indicating that the messages relate to the Reviewer's activity on the home publication.
3. If the Reviewer Candidate has outstanding review invitations or reviews in progress on publications that are sharing Reviewers with the home publication, a new header "**This publication and others:**" is displayed below the new "This publication:" section.
 - a. If the Reviewer Candidate has outstanding review invitations on publications that are sharing reviewers with the home publication, '**Total Outstanding Invitations (x)**' displays in red text, (where the x is replaced with the combined number of outstanding invitations, including the home publication).
 - b. If the Reviewer Candidate has reviews in progress on publications that are sharing reviewers with the home publication, '**Total Reviews in Progress (x)**' displays in red text, (where the x is replaced with the combined number of reviews in progress, including the home publication).
4. If there are no outstanding invitations or reviews in progress outside of the publication being searched, the messages in bullets a) and b) above are not shown. The number of outstanding invitations and reviews in progress for the publication being searched are already shown in the columns 'Reviewer Statistics (Agreed Invitations)' and 'Invitation Statistics'.

Reviewer Candidates

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

Page: 1 of 1 (79 total Reviewers) Display 10 results per page.

Select As			Reviewer Name	Board Member	Classifications *	Reviewer Statistics (Agreed Invitations)		Invitation Statistics	
Inv.	Alt.	Prop.				Reviews in Progress:	Completed Reviews:	Outstanding Invitations:	Agreed:
		<input type="checkbox"/>	Christopher Tallon, MD (Reviewer)	No	0 Class matches with MS	1	8	0	11
			Unavailable			0	0	0	0
			This publication:			2	Jul 14 2009 10:24AM	1	0
			Reviewer Declined			Oct 26 2005 1:19PM	-	0	12
			Alternate Reviewer for 1 other submission						
			This publication and others:						
			Total Outstanding Invitations (5)						
			Total Reviews in Progress (3)						

(*) indicates match between Reviewer and Manuscript Classifications

Page: 1 of 1 (79 total Reviewers) Display 10 results per page.

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

Larger view:

Page: 1 of 1 (79 total Reviewers)

Select As			Reviewer Name
Inv.	Alt.	Prop.	
		<input type="checkbox"/>	Christopher Tallon, MD (Reviewer)
			Unavailable
			This publication: Reviewer Declined Alternate Reviewer for 1 other submission
			This publication and others: Total Outstanding Invitations (5) Total Reviews in Progress (3)

TO CONFIGURE:

No configuration is needed. The new messages will appear automatically for an IJRS-linked publication if other publications are sharing their Reviewers with the home publication and there are outstanding review invitations or reviews in progress on those publications.

PRODUCTION TRACKING ENHANCEMENTS


Interactive View of the Production Status Grid

In PM version 7.1, the *Production Status Grid* page can contain a large amount of data. If the user is viewing a page with a large number of columns (e.g. lots of Production Tasks), he must scroll horizontally to see all of the desired columns, some of which may not be of interest to particular users.

PM version 7.2 introduces the concept of the “Interactive View” on the *Production Status Grid* (PSG) page. The Interactive View provides simple, intuitive functions allowing the user to customize the view of the page quickly and easily. The Interactive View allows the user to:

1. Freeze one to five columns
2. Reorder columns (i.e. move columns around)
3. Hide columns
4. Resize columns
5. Download the grid in either ASCII text or Unicode (UTF-8) format

Existing functions currently available in the PSG (e.g. dynamic column sorting and exporting data in a tab-delimited format) are also available in the new Interactive View mode. In addition, the following new features are available using the Interactive View:

1. Users can toggle easily between the ‘traditional’ page view and the Interactive view by clicking the ‘Switch to Interactive View’ and ‘Switch to Traditional View’ links.
2. Each user can customize their own Interactive View, by dragging and dropping columns and modifying the grid options. These options are accessed by clicking the ‘Grid Options’ link.
3. The customized settings are saved in the database, so the next time the user logs in (from the same computer or a different computer), the page will display the same way.
4. If the user is not satisfied with the changes he has made in Interactive View mode, he can easily revert back to the default display by clicking the  icon next to the ‘Action’ column header. **IMPORTANT NOTE:** Reverting to the default display will immediately discard all changes the user made, and cannot be undone. The user can make the changes again if necessary.

The Interactive View functions consistently on both Macintosh and PC platforms, on all browsers supported by PM (IE 6.0+, Firefox 2.0+ and Safari 3.0+).

TO CONFIGURE:

No configuration is required to make this new feature available. On upgrade, users with ‘View Production Status Grid’ permission enabled will see the new ‘Switch to Interactive View’ link available on their Production Status Grid. Clicking this link will toggle the view to the new Interactive View. On upgrade, the ‘Traditional View’ (PM version 7.1 layout) continues to display until the user clicks the ‘Switch to Interactive View’ link.

The screenshot shows the 'Production Status Grid' in its traditional view. At the top right, a yellow box highlights the link 'Switch to Interactive View'. Below the grid, a table lists two submissions with their respective details.

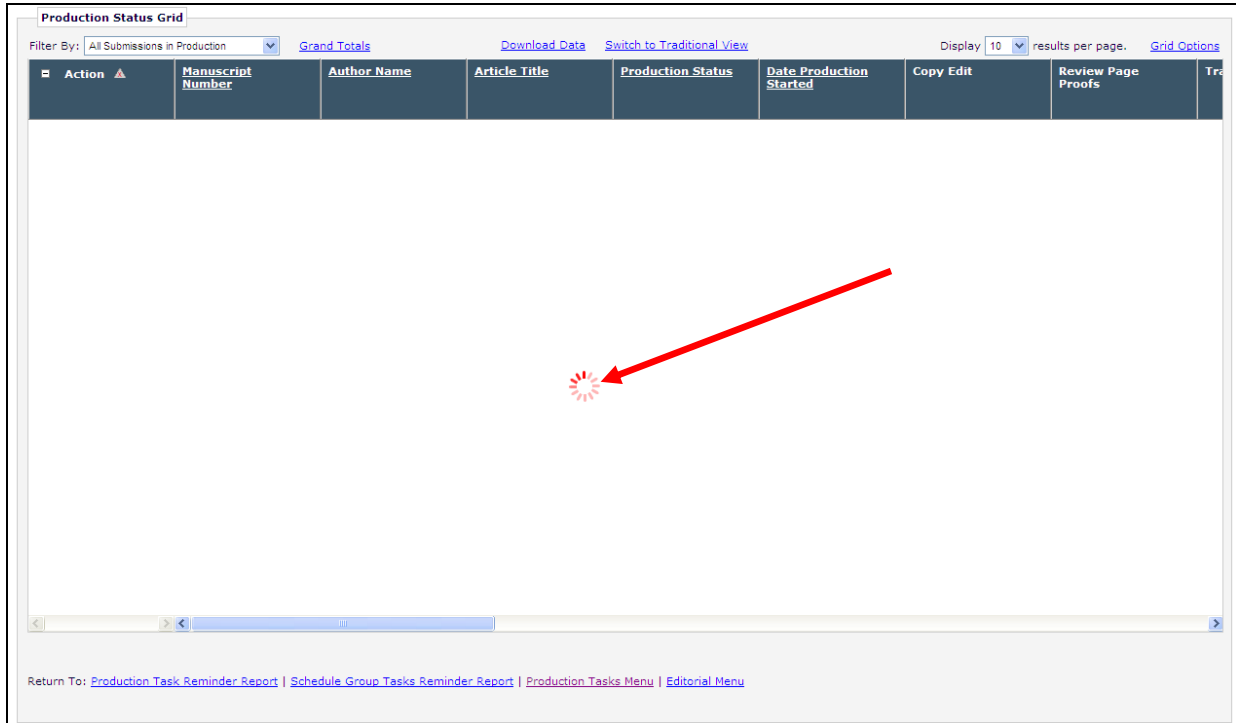
Action	Manuscript Number	Author Name	Article Title	Production Status	Date Production Started	Copy Edit	Review Page Proofs	Submission Target Online Date	Schedule Group
Production Details History Transmittal Form Assign Production Task Send E-mail	CAROLINETEST60-D-07-00001	John T Webber (UNITED STATES)	Test Article title #1	Custom Status -copy edit started	Jul 3 2009	Due Jul 21 2009 Wallace L.M. Astor Slip: 3 days	Must Start: Aug 1 2009 12:00AM Slip: 7 days	Dec 15 2009 12:00AM	December 2009 Issue
Production Details History Transmittal Form Send E-mail	CAROLINETEST40-D-05-00037R1	Dr. Duncan Webber (UNITED STATES)	Test Article Title #2		Jan 9 2009 11:18AM	Submitted May 9 2009 11:23AM Ed J Editor		Dec 15 2009 12:00AM	December 2009 Issue

If a user has switched to the Interactive View, a ‘Switch to Traditional View’ link is available on the Production Status Grid allowing the user to toggle back to the “traditional” view if desired.

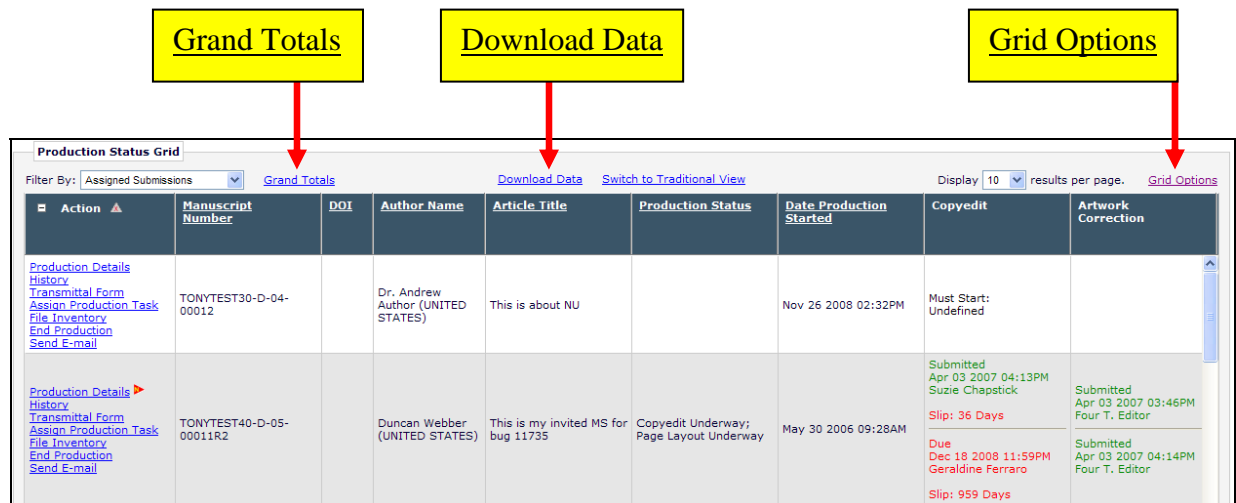
The screenshot shows the 'Production Status Grid' in its interactive view. At the top right, a yellow box highlights the link 'Switch to Traditional View'. The grid header is visible, showing columns for Action, Manuscript Number, Author Name, Article Title, Production Status, Date Production Started, and Copy Edit.

Action	Manuscript Number	Author Name	Article Title	Production Status	Date Production Started	Copy Edit
--------	-------------------	-------------	---------------	-------------------	-------------------------	-----------


When the Interactive View is displayed for the first time, or after the user selects a different filter or a changes the Grid Options, a spinning circle will display while the data is loading.



After the Interactive View has been loaded, the user can take advantage of some enhanced functionality such as seeing the Grand Totals without having to scroll to the bottom of the Grid by clicking the 'Grand Totals' link, downloading the data in tab-delimited format by clicking the 'Download Data' link, or making customizations both to the layout of the page itself by dragging and dropping columns or by clicking the 'Grid Options' link.



Viewing Grand Totals:

Clicking the 'Grand Totals' link will display a pop-up box in the Interactive View containing the Grand Total numbers for all submissions in the selected filter. The box can be moved on the screen by dragging the gray 'Grand Totals' title bar. Clicking the  in the upper right corner closes the box.

	Number of Pages	Black and White Image Count	Color Image Count
Budget	200	12	3
Current	2	5	6

Production Status Grid

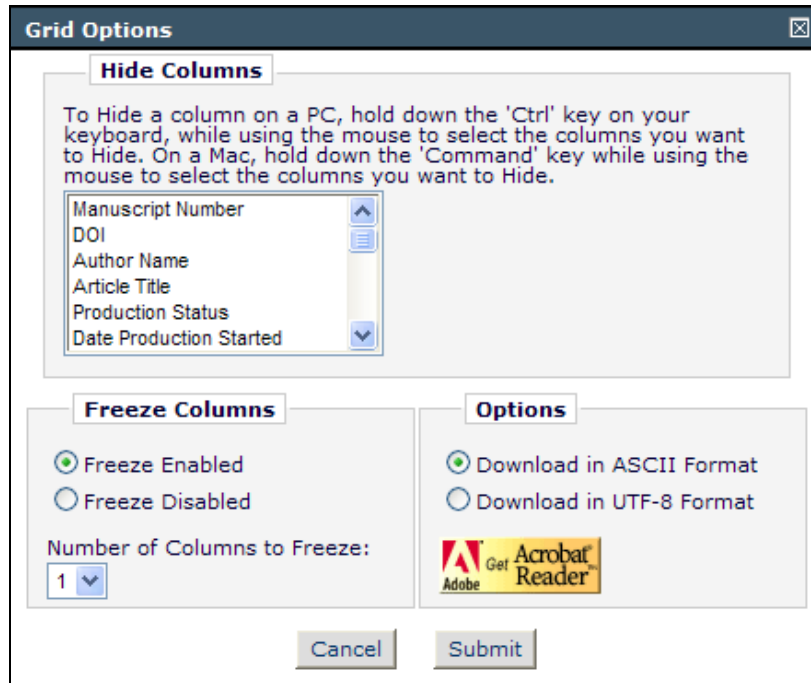
Filter By: Spring Issue [Grand Totals](#) [Download Data](#) [Switch to Traditional View](#) Display 10 results per page. [Grid Options](#)

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Production Started	Copyedit	Artwork Correction	Page Layout
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO307		Anthony Author (UNITED STATES)	This is a training paper		Mar 08 2007 09:49AM	Submitted Apr 03 2007 04:30PM Suzie Chapstick		Submitted Aug 07 2008 03:13PM Jack Lavelle
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO391		Mr. Kevin M. Carlson (UNITED STATES)			2007	Cancelled Apr 03 2007 12:47PM Suzie Chapstick		Submitted Apr 03 2007 03:08PM Jack Lavelle
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO414R1		Anthony Author (UNITED STATES)	This is a training session for our friends in Westb.	Page Layout Underway	Mar 07 2007 04:13PM	Submitted Apr 03 2007 04:13PM Suzie Chapstick		Due Apr 17 2007 11:59PM Jack Lavelle

Setting Display via 'Grid Options':

The 'Grid Options' link opens a pop-up box where users may customize more options for the Interactive Grid display. The Grid Options have settings that allow the user to 'Hide Columns', 'Freeze Columns' and designate how many to freeze, choose which format the file will download in (ASCII format or UTF-8 format), as well as the ability to download Acrobat Reader.

- If the user does not make any changes, all columns are displayed (not hidden), one column (the Action column) is frozen, and the download option is set to ASCII format.
- The user can make changes and click the 'Submit' button. The Interactive View will reload (the spinning circle will display) and the user's changes will be active.



Freezing a Column:

Columns can be ‘frozen’, similar to the ‘Freeze Panes’ feature in Excel. The default setting is to have one column (the Action column) frozen, but users may choose to have up to five columns frozen.

When columns are ‘frozen’, the frozen columns will always display on the left side of the grid. The columns to the right of the frozen columns can be scrolled while the frozen columns retain their position. This is helpful when there are a large number of Submission Production Tasks that the user wishes to review, allowing them to still display identifying information on the left, such as DOI or Manuscript Number.

In the example below, the ‘Action’ column is the only frozen column. ‘Manuscript Number’ is the first column initially, but after scrolling to the right, ‘Production Status’ is displayed as the second column. Note that the ‘Action’ column has retained its position.

Manuscript Number Column

Production Status Grid

Filter By: Spring Issue [Grand Totals](#) [Download Data](#) [Switch to Traditional View](#) Display 10 results per page. [Grid Options](#)

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Production Started	Copyedit	Artwork Correction	Page Layout
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO307		Anthony Author (UNITED STATES)	This is a training paper		Mar 08 2007 09:49AM	Submitted Apr 03 2007 04:30PM Suzie Chapstick		Submitted Aug 07 2008 03:13PM Jack Lavelle
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO391		(UNITED STATES)	research		12:26PM	Submitted Apr 03 2007 03:04PM Jen Editor		Jack Lavelle 03:08PM
Production Details History Transmittal Form Assign Production Task File Inventory End Production	DEMO414R1		Anthony Author (UNITED STATES)	This is a training session for our frinds in Westb.	Page Layout Underway	Mar 07 2007 04:33PM	Submitted Apr 03 2007 04:13PM Suzie Chapstick		Due Apr 17 2007 11:59PM Jack Lavelle

Submissions 1 to 8 of 8

Return To: [Production Task Reminder Report](#) | [Schedule Group Tasks Reminder Report](#) | [Production Tasks Menu](#) | [Editorial Menu](#)

Column 1 is "frozen" – only columns to the right of column 1 can be scrolled

After scrolling, the 'DOI' column is displayed next to the Action column. The Action column is still frozen.

Production Status Grid

Filter By: Spring Issue [Grand Totals](#) [Download Data](#) [Switch to Traditional View](#) Display 10 results per page. [Grid Options](#)

Action	DOI	Author Name	Article Title	Production Status	Date Production Started	Copyedit	Artwork Correction	Page Layout	Review Page Proofs
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail		Anthony Author (UNITED STATES)	This is a training paper for Jeff in FLA		Mar 08 2007 09:49AM	Submitted Apr 03 2007 04:30PM Suzie Chapstick		Submitted Aug 07 2008 03:13PM Jack Lavelle	
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail		Mr. Kevin M. Carlson (UNITED STATES)	Breast cancer research	Production Initiated	Apr 03 2007 12:26PM	Cancelled Apr 03 2007 12:47PM Suzie Chapstick Submitted Apr 03 2007 03:04PM Jen Editor		Submitted Apr 03 2007 03:08PM Jack Lavelle	Submitted Apr 03 2007 03:12PM Kevin M. Carlson
Production Details History Transmittal Form Assign Production Task File Inventory End Production		Anthony Author (UNITED STATES)	This is a training session for our frinds in Westb.	Page Layout Underway	Mar 07 2007 04:33PM	Submitted Apr 03 2007 04:13PM Suzie Chapstick		Due Apr 17 2007 11:59PM Jack Lavelle	

Submissions 1 to 8 of 8

Return To: [Production Task Reminder Report](#) | [Schedule Group Tasks Reminder Report](#) | [Production Tasks Menu](#) | [Editorial Menu](#)

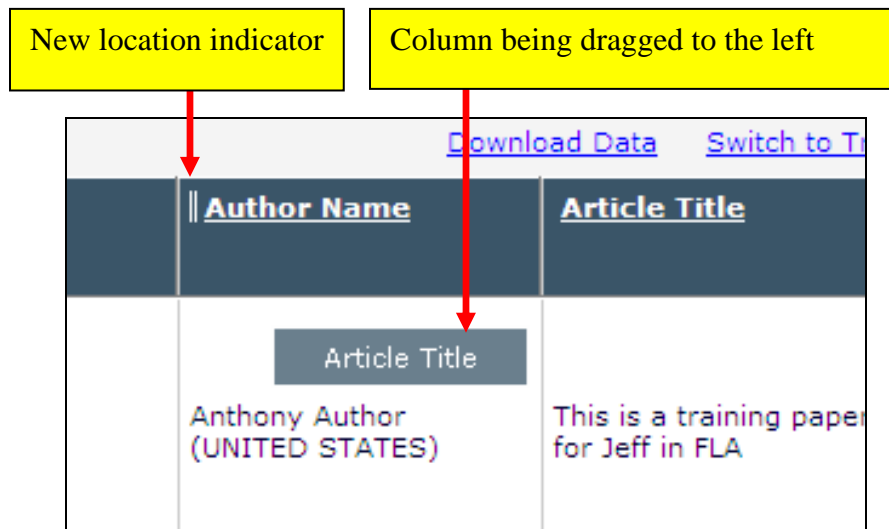
Moving a Column:

Columns can be moved in the Interactive View by dragging and dropping the column headers.

NOTE: A column cannot be moved into the 'Frozen' column area, so if the user has 3 columns frozen and wants to insert a column into the second position, they must first unfreeze the second and third columns by setting 'Freeze Disabled' or 'Freeze Enabled' – 'Number of Columns to Freeze: 1'. After moving the columns the 'Number of Columns to Freeze' can be reset to '3'.

To 'Drag and Drop' a column:

- On a PC, click the left mouse button in a column header, then, without letting up on the left mouse button, drag the column to the desired position. The column name is displaying while the user is dragging it. A double vertical line appears where the column will be placed. In the example below, the column 'Article Title' is being dragged to appear to the left of the column 'Author Name'
- On a MAC, click and hold the mouse button while dragging the column.



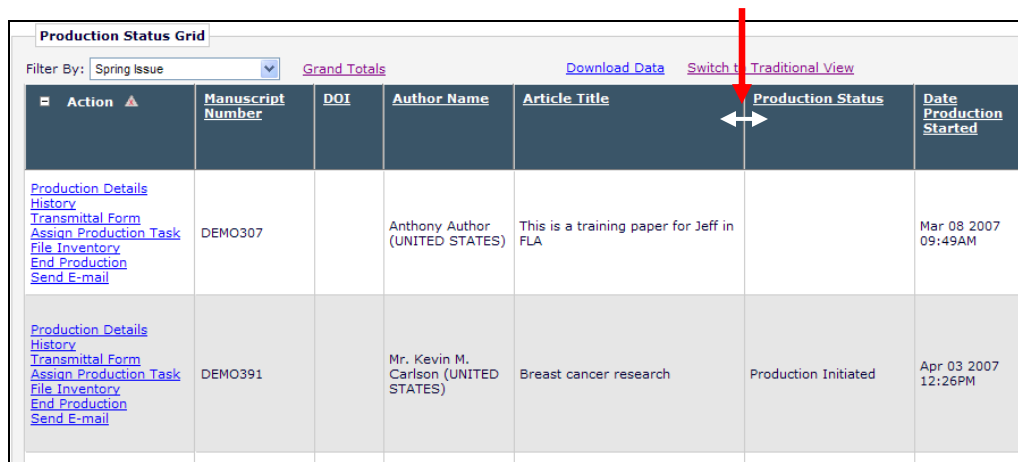
Resizing a Column:

Similar to Excel, hover the cursor over the line between the two columns. A horizontal arrow will appear.

- On a PC, hold down the left mouse button and drag the bar to the left or right. The entire column will resize. Tip: The text in the column is visible in a popup “tooltip” if the mouse is hovered over the text.

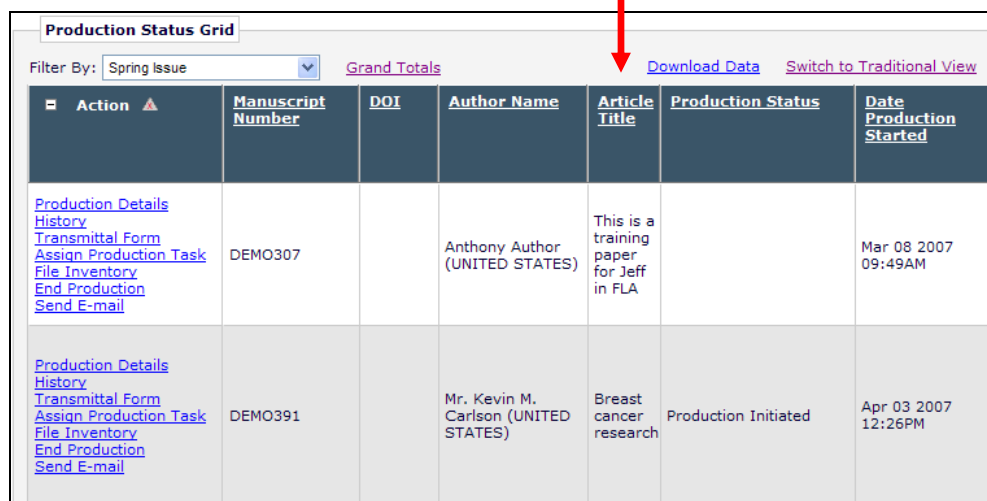
In the following example, the user wants to shrink the ‘Article Title’ column.

First the user positions their mouse over the column dividing line in the column header, between ‘Article Title’ and ‘Production Status’, and a horizontal arrow appears (shown in white in this example, in the actual PM site it may be black with a white border):



Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Production Started
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO307		Anthony Author (UNITED STATES)	This is a training paper for Jeff in FLA		Mar 08 2007 09:49AM
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO391		Mr. Kevin M. Carlson (UNITED STATES)	Breast cancer research	Production Initiated	Apr 03 2007 12:26PM

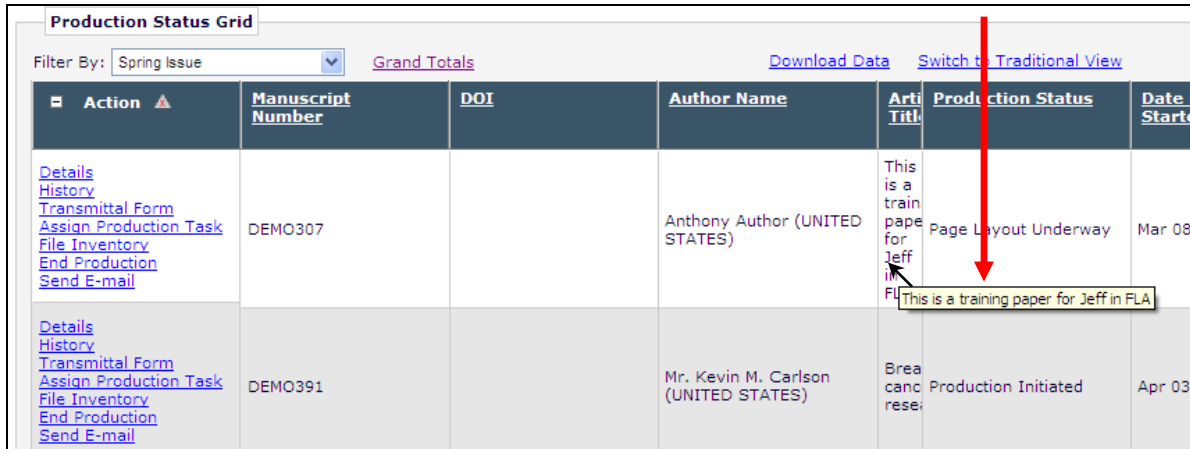
The user holds down the mouse button and drags the column divider to the left, narrowing the ‘Article Title’ column. When the mouse is released, the new column size is retained.



Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Production Started
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO307		Anthony Author (UNITED STATES)	This is a training paper for Jeff in FLA		Mar 08 2007 09:49AM
Production Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO391		Mr. Kevin M. Carlson (UNITED STATES)	Breast cancer research	Production Initiated	Apr 03 2007 12:26PM

Displaying Information in a Column:

When columns are resized, users may not be able to view all of the data in a cell. To allow users to still see the data, a “tooltip” box will display the data of the cell when the mouse is hovered over the cell. In the example below, the full text of the Article Title for DEMO307 displays in a “tooltip” box. In this way the columns can be resized as desired, and the text in the column is still available to the user.




The screenshot shows a web application interface titled "Production Status Grid". At the top, there is a filter dropdown set to "Spring Issue", a "Grand Totals" link, a "Download Data" link, and a "Switch to Traditional View" link. The table below has columns for Action, Manuscript Number, DOI, Author Name, Article Title, Production Status, and Date Started. The first row (DEMO307) has a tooltip over the Article Title cell. A red arrow points from the top of the tooltip to the cell. The tooltip text is "This is a training paper for Jeff in FLA".

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Started
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO307		Anthony Author (UNITED STATES)	This is a training paper for Jeff in FLA	Page Layout Underway	Mar 08
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO391		Mr. Kevin M. Carlson (UNITED STATES)	Brea cand rese	Production Initiated	Apr 03

Sorting by a Column:

The Interactive View supports a sort on one column at a time. The columns that can be used for sorting have column headers that are underlined. The initial sort of the Interactive View is by Submission Target Online Date (ascending), which means that submissions with the earliest Submission Target Online Dates are shown first (if there is no date, these appear first). A gray 'up-facing' triangle appears next to the column name, indicating that this is the column used for the sort, and the column sort is ascending. This triangle is an indicator only – to sort this column in the other direction, the underlined column name is clicked, not the triangle itself. NOTE: This is different from the sorting functionality in the Traditional View, where the triangle itself is clicked.

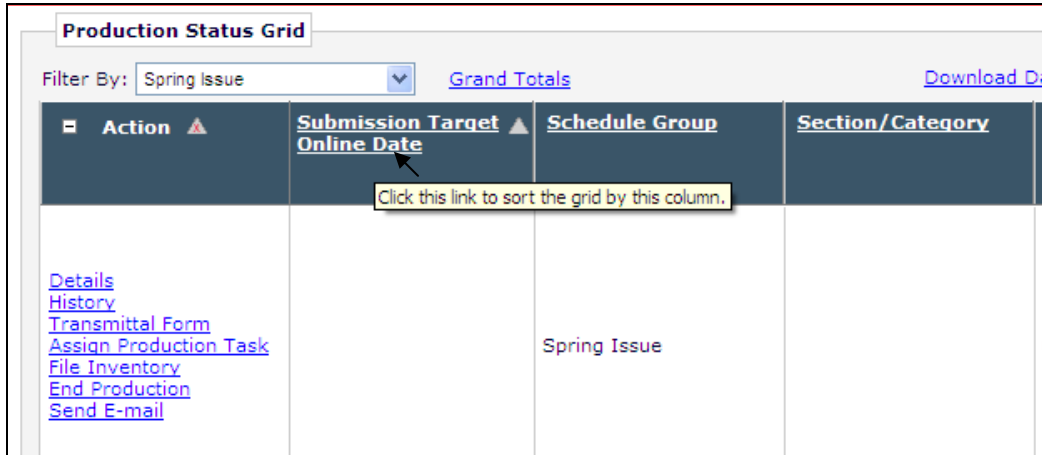


Production Status Grid

Filter By: [Grand Totals](#)

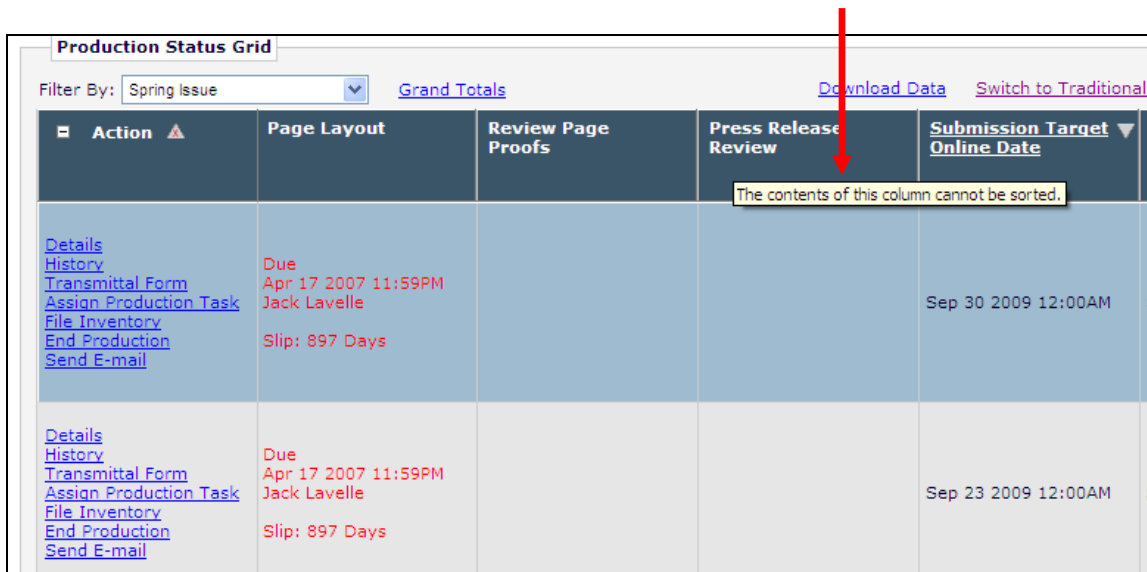
Action	Submission Target Online Date	Schedule Group
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail		Spring Issue
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	Sep 10 2009 12:00AM	Spring Issue
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	Sep 18 2009 12:00AM	Spring Issue

Hovering over an underlined column header brings up the tooltip box with the text “Click this link to sort the grid by this column.”



NOTE: If the column header text is *not* underlined, that column is not sortable (e.g. Production Tasks are not sortable). Hovering the cursor over a non-sortable column header displays the “tooltip” text ‘The contents of this column cannot be sorted.’ If the user clicks the column header, a pop-up warning box gives the same information.

In the example below, the user has hovered their mouse over the text ‘Press Release Review’.



To change the sort order of the grid, click any underlined column header (this will reload the page using an ascending sort on that column). To change from ascending to descending sort, click the column header again, and the gray arrow will now be a down-pointing arrow.

Example 1: The user changed the Submission Target Online Date to a descending sort by clicking on the underlined column header. The gray triangle is now pointing downward, indicating a descending sort (furthest out dates appear first).

Production Status Grid

Filter By: Spring Issue [Grand Totals](#) [Download Data](#)

Action ▲	Submission Target Online Date ▼	Schedule Group	Section/Category
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	Sep 30 2009 12:00AM	Spring Issue	
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	Sep 23 2009 12:00AM	Spring Issue	

Example 2: The user changed the grid sort to use Production Status (ascending), by clicking on the underlined column header 'Production Status'. The gray upward triangle is now shown next to the Production Status column header, indicating the current sort.

Production Status Grid

Filter By: All Submissions in Production [Grand Totals](#) [Download Data](#) [Switch to Traditional View](#)

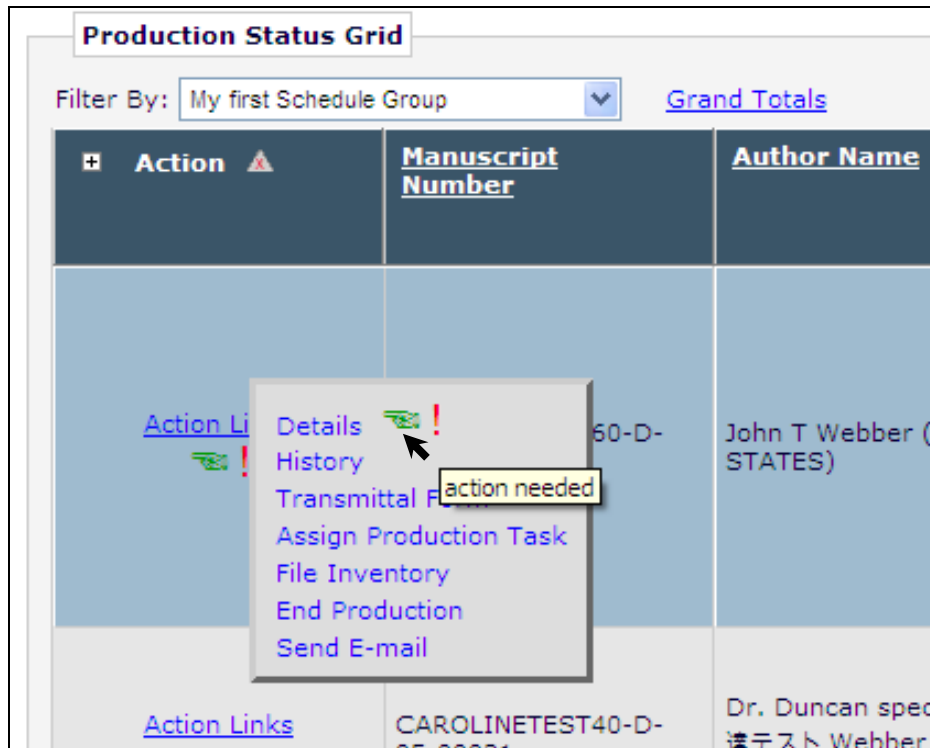
Action ▲	Manuscript Number	DOI	Author Name	Arti Titl.	Production Status ▲	Date Started
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO-D-03-00088		Anthony Author (UNITED STATES)	This is a train for JADA	Copyedit Underway; [Press Release Submitted]; Author Review of Proofs Underway	May 30
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO-D-03-00087R1		Mr. Kevin M. Carlson (UNITED STATES)	Exer - Indu Asthi	Copyedit Underway; Artwork Correction Underway; [Not Copyedited]	Apr 03
Details History Transmittal Form Assign Production Task File Inventory End Production Send E-mail	DEMO414R1		Anthony Author (UNITED STATES)	This is a train sessi for our frind in West	Page Layout Underway	Mar 07

Any sort that the user may apply will be retained when the user leaves the grid and subsequently returns to the page.

Submission Flag Display:

The Action Menu in the Interactive View can be expanded or collapsed as it can in other EM/PM

folders. If Submission Flags are associated with a submission, there is a slight difference in their behavior on the Interactive Grid. When the Action links are expanded, hovering the cursor over a Submission Flag does not show the Submission Flag name. However, when the Action links are collapsed and you hover the mouse over the 'Action Links' link to display the Action list, hovering then over a Submission Flag will display the "tooltip" with the Submission Flag name.



Interactive View Saved Settings:

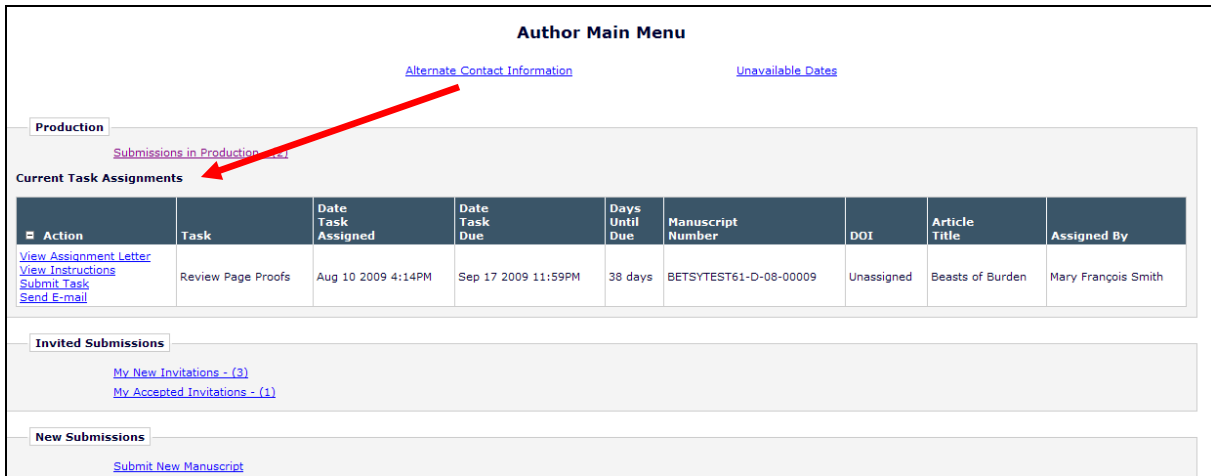
All customizations made to the Interactive View by the logged-in user are saved in the database for that user. The next time that user uses the Interactive View of the production status grid, the custom settings are used. For example, if Ed Editor narrowed the Article Type column when viewing the Production Status Grid for the Schedule Group 'Spring Issue', when Ed views the Schedule Group 'Summer Issue', the Article Type column will have the same narrow width. This applies to all customizations, including dragged and dropped columns, column sorts, or changes to the Toolbox.

NOTE: Proxy Behavior – Since the Interactive View settings are saved in the database, if a proxy user changes another user's page display, the new page display is saved in the database and will be the default page display the next time that user visits the page. For example: If Ed Editor proxies for Joe Black to set up Joe's grid for him, Joe will see the new display the next time he visits the page.

Display Current Task Assignments Directly on Author Main Menu

In PM version 7.1, Authors must click the [Current Task Assignments](#) link on the Author Main Menu to see their current assignments.

In version 7.2, there is a new option to display the Current Task Assignments directly on the Author Main Menu. When configured, a 'Current Task Assignments' grid will display directly on the Author's Main Menu.

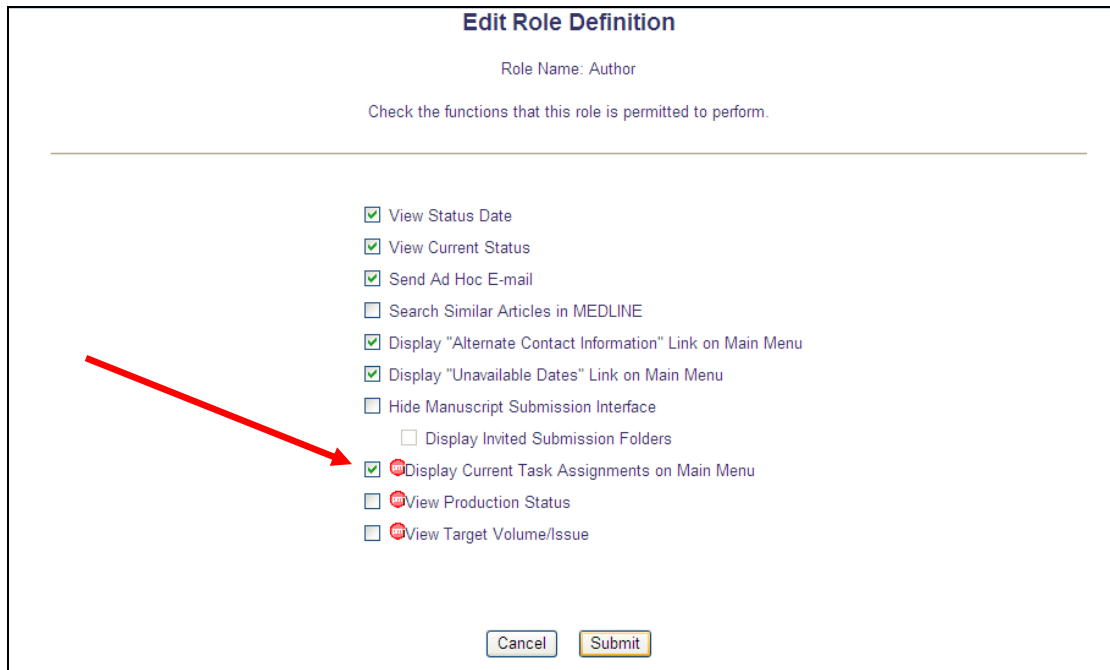


The screenshot shows the 'Author Main Menu' interface. At the top, there are links for 'Alternate Contact Information' and 'Unavailable Dates'. Below these are sections for 'Production', 'Invited Submissions', and 'New Submissions'. A red arrow points to the 'Current Task Assignments' section, which contains a table with the following data:

Action	Task	Date Task Assigned	Date Task Due	Days Until Due	Manuscript Number	DOI	Article Title	Assigned By
View Assignment Letter View Instructions Submit Task Send E-mail	Review Page Proofs	Aug 10 2009 4:14PM	Sep 17 2009 11:59PM	38 days	BETSYTEST61-D-08-00009	Unassigned	Beasts of Burden	Mary François Smith

TO CONFIGURE:

Go to Author RoleManager and enable the new permission 'Display Current Task Assignments on Main Menu'.



The screenshot shows the 'Edit Role Definition' form for the 'Author' role. The role name is 'Author'. The form contains a list of permissions with checkboxes. A red arrow points to the 'Display Current Task Assignments on Main Menu' checkbox, which is checked.

- 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
- Display Current Task Assignments on Main Menu
- View Production Status
- View Target Volume/Issue

Buttons: Cancel, Submit

Increased Visibility throughout Production for Authors

Customers have asked us to increase Authors' visibility of submissions by providing access to more details (e.g. production status) as a submission progresses through production. This enhanced visibility would allow the Author to track the submission's progress through the production process, and query the publication through the system (e.g. via the [Send E-mail](#) action link), hopefully reducing the number of calls to the production office.

In PM version 7.2, there are two new folders on the Author Main Menu to provide this enhanced visibility:

1. [Submissions in Production](#) - This folder gives the Author visibility to his submission(s) in progress, whether his task has been completed or whether he was not assigned a task.
2. [Submissions with Production Completed](#) - This folder gives the Author visibility to his submission(s) after production has been completed.



There is also a new option to display Production Status and/or Target Volume/Issue in these new folders. The Production Status displayed is the last (most recent) status designated to "show in history" in PolicyManager.

NOTE: [Send E-mail](#) is the only link displayed in the action column. If the Author does not have RoleManager permission to 'Send Ad Hoc E-mail', no action links are displayed in these folders.

Submissions in Production

Contents: Listed below are one or more submissions you have authored that are currently in production.


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

Action	Manuscript Number	DOI	Article Title	Production Status	Initial Date Submitted	Accept Date	Target Volume	Target Issue
Send E-mail		Unassigned	DOG TRAINING MADE EASY	In Production	Jul 3 2008 10:17AM			
Send E-mail	TONYTEST40-D-05-00003	94.17005	Test 1.2	Page Layout Underway	May 11 2005 3:54PM	Jun 16 2006 3:13PM	2	2



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

[<< Author Main Menu](#)

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






TO CONFIGURE:

No configuration is required to see the new *Submissions in Production* and *Submissions with Production Completed* folders. However, if you want Authors to see Production Status and/or Target Volume/Issue in these folders, you must go to Author RoleManager and enable the new permissions ‘View Production Status’ and/or ‘View Target Volume/Issue’.

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
-  Display Current Task Assignments on Main Menu
-  View Production Status
-  View Target Volume/Issue

Add External Correspondence to Submission Production Correspondence History

New in EM/PM version 7.2, Editors may be given permission to manually add External Correspondence entries (an item of correspondence, such as an E-mail, received outside of the EM/PM system) to the History of a submission, where they can be viewed alongside EM/PM-generated Internal Correspondence.

Editors with the new ‘Add/Edit External Correspondence’ permission enabled will see a new ‘Add Production Correspondence’ button at the top of the ‘Correspondence History’ section of the *History* page for submissions in Production Tracking. This new permission is not selected (not enabled) on upgrade.

**History for Manuscript Number: BETSYTEST72-D-09-00005, DOI: Unassigned
Anthony Author (UNITED STATES): "Migratory patterns of Tree Frogs"**

[Status History](#) [Production Task History](#) [Correspondence History](#)
[Switch to Status Type View](#)

STATUS HISTORY

Status Date	Document Status	Production Status	Status Days	Role Family	Revision	Operator
Jul 14 2009 11:51AM		Ready for Copyedit	----		0	Mary François Smith, PhD
Jul 14 2009 11:51AM		Production Initiated	----		0	Mary François Smith, PhD
Jul 14 2009 11:50AM	Accept		----	EDITOR	0	Edward Editor, MD
Jul 14 2009 11:50AM	Decision in Process		----	REVIEWER	0	Edward Editor, MD
Jul 14 2009 11:44AM	Under Peer Review		----	REVIEWER	0	Edward Editor, MD
Jul 14 2009 11:39AM	Received by Editor		----	EDITOR	0	Mary François Smith, PhD
Jul 14 2009 10:48AM	Received by Journal		----	EDITOR	0	Anthony Author, MD
Jul 14 2009 10:48AM	Needs Approval		----	AUTHOR	0	Anthony Author, MD
Jul 14 2009 10:47AM	Building PDF		----	AUTHOR	0	Anthony Author, MD
Sep 9 2005 4:41PM	Incomplete		1404	AUTHOR	0	Anthony Author, MD

CORRESPONDENCE HISTORY


Correspondence Date	Letter	Recipient	Status	Revision	Operator
Jul 14 2009 11:50AM	Reviewer Notification of Decision and Thank You	Robert Referee, MD	Accept	0	Edward Editor, MD
Jul 14 2009 11:50AM	Editor Decision - Accept	Anthony Author, MD	Accept	0	Edward Editor, MD
Jul 14 2009 11:50AM	Journal Office Notice Editor Decision Notification	Mary François Smith, PhD	Decision in Process	0	Edward Editor, MD

Clicking this button will bring the Editor to a new *Add/Edit External Correspondence* page. Editors may set the date and time (US Eastern Time) of the correspondence, enter a Description for the correspondence (a required field), and also the sender (‘From’) and recipient (‘To’) of the letter, the subject line, and the contents of the letter.

Add External Production Correspondence

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

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

* Correspondence Date:  (mm/dd/yyyy) Time: Hour: Minute: AM/PM: (US Eastern Time)


* Description:

From:

To:

Letter Subject:

Letter Contents: [Insert Special Character](#) [Open In New Window](#)

Saving this letter adds it to the *History* page of the submission, inserted into the list chronologically. The text '(External)' displays next to the letter link identifying this letter as External Correspondence. This correspondence is then visible to all users with the existing  'View Submission Production Correspondence History' permission enabled. Editors with the new 'Add/Edit External Correspondence' permission may also Remove or Edit these external correspondence items if desired.

NOTE: Users with 'View Editorial Correspondence History' permission enabled and the new 'Add/Edit External Correspondence' permission may also add Editorial Correspondence. See the 'Add External Correspondence to Submission (Editorial) Correspondence History' section of this document for more information.

TO CONFIGURE:

In RoleManager, select the Editor Roles to be granted the new 'Add/Edit External Correspondence' permission. Enable the new permission to allow Editors to add External

Correspondence into PM.

Add External Correspondence to Schedule Group Production Correspondence History

New in EM/PM version 7.2, Editors may be given permission to manually add External Correspondence entries (an item of correspondence, such as an E-mail, received outside of the EM/PM system) to the History of a schedule group, where they can be viewed alongside PM-generated Internal Correspondence.

Editors with the new 'Add/Edit External Correspondence' permission enabled will see a new 'Add Production Correspondence' button at the top of the 'Schedule Group Correspondence History' section of the *History* page for a Schedule Group. This new permission is not selected (not enabled) on upgrade.

History for Schedule Group: Fall Issue

[Production Task History](#) [Production Correspondence History](#)

SCHEDULE GROUP TASK HISTORY

Date Task Assigned	Production Task	Date Task Due	Assigned By	Assigned To	Production Task Status	Date Task Closed	Closed By	Assigned Task Files
Nov 26 2008 11:35AM	Copy Edit and Review	Feb 18 2009 11:59PM	Mary François Smith	Mick a Jagger	Open	Nov 26 2008 11:35AM		No Assigned Files

SCHEDULE GROUP CORRESPONDENCE HISTORY

Correspondence Date	Letter	Recipient	Operator
Nov 26 2008 11:35AM	Copvedit Required	Mick a Jagger	Mary François Smith

[Production Task History](#) [Production Correspondence History](#)

Clicking this button will bring the Editor to a new *Add/Edit External Correspondence* page. Editors may set the date and time (US Eastern Time) of the correspondence, enter a Description for the correspondence (a required field), and also the sender ('From') and recipient ('To') of the letter, the subject line, and the contents of the letter.

Add External Production Correspondence

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

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

* Correspondence Date: (mm/dd/yyyy) Time: Hour: Minute: AM/PM: (US Eastern Time)

* Description:

From:

To:

Letter Subject:

Letter Contents: [Insert Special Character](#)

Saving this letter adds it to the *History* page of the schedule group, inserted into the list chronologically. The text '(External)' displays next to the letter link identifying this letter as External Correspondence. This correspondence is then visible to all users with the 'View Schedule Group Production Correspondence History' permission enabled. Editors with the 'Add/Edit External Correspondence' permission may also Remove or Edit these external correspondence items if desired.

TO CONFIGURE:

In RoleManager, select the Editor Roles to be granted the new 'Add/Edit External Correspondence' permission. Enable the new permission to allow Editors to add External Correspondence into PM.

Unavailability Information when Assigning Production Tasks

New in EM/PM version 7.2, the *Assign Production Task* and *Assign Production Task for Schedule Group* pages are enhanced to display additional Unavailable information for any assignee, whether a Publisher, Editor, or Author.

When a publication has the 'Set Check Unavailability' setting configured with a number greater than '0', then the appropriate date range is checked for any selected Assignee when assigning a task.

- A warning message displays next to the selected assignee to inform the user assigning the task that the selected person has unavailable dates that fall within the configured unavailability check window. NOTE: The system will not prevent an 'unavailable' person from being assigned a Production Task; this warning is for informational purposes only.
- Below the message, a grid displays the list of Unavailable Dates that fall within the configured time frame as well as the reason for the assignee's unavailability.
- If the Assignee has entered any suggested substitutes to contact in their absence, those names and e-mail addresses are listed below the grid. The user making the assignment may choose to send a carbon copy (cc:) of the assignment letter to any of the substitutes by selecting the appropriate checkboxes.

NOTE: Under existing functionality – Editors and Publishers do not receive deep links to their task; they must log into the system to see their tasks. Authors may be notified of their task assignments with the %PROD_TASK_DEEP_LINK%. If this deep link is used, the deep link WILL populate in these cc:'d letters. It is recommended that users sending notes to any substitute remove the deep link from the letter for security reasons. It should be the responsibility of the Assignee to manage the process for their substitutes to log in and receive the tasks.

**Assign Production Task for Manuscript Number: INFORM-2009-8
Coal Hopkins (UNITED KINGDOM): "Faceted Classification in XML DTD Taxonomy"**

Cancel Assign Task and Send Letter

Schedule Group: No Schedule Group Assigned
 Production Task: Copy Editing
 Due Date: 08/01/2009 (mm/dd/yyyy)

Task Assigned to: River Took/Editor

Assignment Letter: Additional recipients can be copied by typing their e-mail addresses into the blank boxes next to cc: Multiple e-mail addresses can be included, separated by semicolons(;).

From: "The Journal of Information Architecture" <admin@edmgr.inform.com>

To: **River Took** This person is unavailable on the following dates.
 If desired, please select a substitute below to receive an additional copy of the assignment letter.

Start Date	End Date	Reason
Jul 24 2009 12:00AM	Aug 07 2009 11:59PM	Traveling in Iowa and Minnesota

Select Substitutes to CC:

Laurel Quinn <lquinn@mail.com>
 Mica Turner <mica.turner@oxford.edu>
 Oriole Tucker

Letter Purpose: Copy Editing Assignment
 Letter Subject: You have been assigned a copy editing task
 cc:

Letter Body: [Insert Special Character](#) [Preview Letter](#) [Open in New Window](#)

Dear %TITLE% %LAST_NAME%,
 You have been assigned a copyedit task for Laurel's 7.2 Test Site.
 To pick up your assignment, please go to <http://testweb.editorialmanager.com/laureltest72/>.
 With kind regards
 Oriole Tucker
 Managing Editor

Submission Files

Item	Description	Item Family	File Name	Size	Last Modified	QC Results	Allow Download
Manuscript	Manuscript	Default	Faceted Classification in XML Ontologies.doc	23.5 KB	Apr 3 2009 4:30PM	N/A	<input type="checkbox"/>

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

Companion Files

[Upload New Companion File](#)

Cancel Assign Task and Send Letter

TO CONFIGURE:

There is no configuration required to have the Unavailability grid and warning message display when assigning a production task.

COMMERCE MANAGER OVERVIEW

Commerce Manager is a new product offering for EM/PM customers in version 7.2. It allows scholarly publications to support a wide variety of manuscript fees and business models, by seamlessly integrating payment processing with the editorial and/or production workflow. This eliminates the unnecessary administration and Author frustration traditionally associated with fee processing.

Using Commerce Manager, publications can request Author payment at various points in the submission workflow, using a Submission Fee or, simply, a Fee (i.e. all other types of fees that are not Submission Fees). Publications may configure fees so that Authors can request a waiver, request a bill, or pay with a credit card. Publications that wish to accept credit card payments for Author fees must obtain their own PayPal account and follow the *Commerce Manager with PayPal Implementation Guide* procedures to successfully process credit card payments from EM/PM.

It is important to note that publications are not *required* to accept credit card payments in order to use Commerce Manager. If your publication wants to charge fees but prefers to handle the billing and collection of payments outside the system, this is completely supported using the 'Bill Me' payment option. If your publication wants to charge fees and *only* accept credit card payments (no manual billing), this is completely supported using the 'Credit Card' payment option. Or, you can allow both forms of payment. You may also choose to supplement these payment options by allowing Authors to 'Request Waiver' or 'Request Institutional Waiver', depending on your publication's business practices. If you start off with manual billing and want to start accepting credit cards later, it can be done without interruption to your users.

If you want the Author to pay a fee when initially submitting a manuscript to EM, a Submission Fee is used. This can be a flat fee or a 'tiered' price, where the Author picks the appropriate pricing option. The Submission Fee can be configured so that the manuscript cannot be processed by the editorial office until payment is received. Below is just a sample of the different types of Submission Fees that can be implemented:

1. A 'flat' \$100 submission fee.
2. Discounted submission fee for society members: \$100 non-members, \$75 members, \$60 students.
3. A 'flat' €1,500 open access fee.
4. Author's choice of currency for open access fee: €1,540; \$1,995; 1,425£; ¥190,000.

A non-submission Fee (simply called 'Fee' in the user interface) is flexible to support virtually any pricing model that you may have. These Fees should be used if you have a complex fee structure that cannot easily be calculated by the system, multiple discounts, and/or you expect the Author to pay at a later point in the editorial or production workflow. Below are just a few of the real-world payment models supported with this type of Fee:

1. Publisher charges a publication fee, payable when the article is accepted for publication.
2. Publisher offers a 15% discount for member institutions, 20% discount for Authors who

reviewed for the publication in the last 12 months, 30 GBP discount for articles submitted with EndNote and references checked.

3. Publisher solicits page charge when the submission enters production. The amount is discounted based on the number of typeset pages of the article (e.g. \$50 per page for the first 5 pages, \$35 per page for 6-10 pages, \$20 per page for 11+ pages). Page charge does not apply if the Author is e-publishing only.
4. Publisher solicits color charge when the submission is accepted for publication. The amount is scaled based on the number of color images, and subjective discounts may be applied to society members.
5. Extra image charge payable when a particular production task is initiated.
6. The Author's waiver request for the Submission Fee was denied, so the publisher may apply a subjective discount to a particular Author for the total image charge.
7. Publisher may subjectively allow discounted pricing for Authors from particular countries (based on economic status or the desire to publish more articles from a particular country).

Appropriately authorized Editor or Publisher Roles can initiate a Fee for a submission at any point in the workflow. The user can select from a pre-configured template, or can create a new Fee 'from scratch' by entering all the parameters for the Fee (e.g. fee description, amount, allowable payment methods, etc.). The user can then send a letter to the Author notifying him that payment is being requested.

Publications can use a combination of a Submission Fee and/or non-submission Fees to achieve the desired payment model for their organization.

TO CONFIGURE COMMERCE MANAGER:

The Commerce Manager product is licensed separately. If your publication is interested in using Commerce Manager, contact your Aries customer service representative. If you want to allow Authors to pay by credit card, your Aries representative will provide you with instructions to establish a PayPal account for accepting credit card payments from EM/PM.

Submission Fee Overview

A Submission Fee may be a 'flat' amount (e.g. 100 USD submission fee, 1,540 EUR open access fee), or the amount can be determined based on society membership or some other criteria (e.g. 75 USD members, 100 USD non-members, 60 USD students). Publications can create one or more Submission Fees in PolicyManager, which are then associated with one or more Article Types (one Submission Fee per Article Type). So, a publication could charge a flat Submission Fee for original research, (one type of Submission Fee), a discounted fee based on society membership for clinical studies (a second Submission Fee), and no fee for invited papers or editorials.

When creating each Submission Fee, the publication may decide to allow one or more Payment Methods (Credit Card, Bill Me, Request Waiver, or Request Institutional Waiver) for the

Submission Fee. The Author will then have the option to select which of the approved payment methods he wishes to use to complete the submission.

Submission Fee Configuration page in PolicyManager

Edit Submission Fee

Below you can enter the parameters for the Submission Fee. When this task is completed, click the 'Add Pricing Options' button to create and associate different price options for this Submission Fee. If it is a 'flat' fee (the same amount for all Authors), only one pricing option should be added to the Submission Fee. If you would like the Author to choose from two or more pricing options (e.g. \$100 for society members, \$125 for non-members), you should create multiple price options and associate each of them with the Submission Fee.

Fee Description: [Insert Special Character](#)

Maximum 256 characters

Hide When you Hide a Submission Fee the Submission Fee will be deactivated (not available for use with any Article Types)

<p>Allowable Payment Methods</p> <p><input checked="" type="checkbox"/> Credit Card</p> <p><input type="checkbox"/> Bill/Check</p> <p><input type="checkbox"/> Request Waiver</p> <p><input checked="" type="checkbox"/> Request Institutional Waiver</p>	<p>Payment Instructions</p> <p>Insert Special Character</p> <p><small>Displayed to Author on the Fees and Payments page, these instructions are specific to this particular Submission Fee. General instructions for the Fees and Payments page are configured on the Edit Commerce Manager Instructions page.</small></p> <p><input type="text" value=" IMPORTANT NOTE! Your manuscript will not be submitted to the journal until you have successfully paid the article processing charge by credit card or requested an institutional waiver. </font"/></p>
<p>Payment Due Letter to Author <small>(Sent only if Author selects 'Bill Me')</small></p>	<p>CM- Submission Fee Due <input type="checkbox"/> This letter serves as the payment invoice</p>
<p>Grant Waiver Letter to Author</p>	<p>CM- Grant Waiver</p>
<p>Deny Waiver Letter to Author</p>	<p>CM- Deny waiver letter</p>
<p>Cancel Fee Letter to Author</p>	<p>CM- Cancel Fee Letter</p>

Select Pricing Options:

Order	Pricing Option	Amount	Currency
<input type="checkbox"/>	\$100 Flat Submission Fee	100.00	USD
<input type="checkbox"/>	I am a society member.	75.00	USD
<input type="checkbox"/>	I am not a society member.	100.00	USD
<input checked="" type="checkbox"/>	I want to pay in EUR.	1540.00	EUR
<input checked="" type="checkbox"/>	I want to pay in GBP.	1425.00	GBP
<input checked="" type="checkbox"/>	I want to pay in USD.	1995.00	USD
<input type="checkbox"/>	\$200.00 USD Flat Fee	200.00	USD

When an Author submits a manuscript with an Article Type that has a Submission Fee, when he approves the submission PDF (the final step of the manuscript submission process) he automatically proceeds to a new *Fees and Payments* page. This page displays the details of the Submission Fee, including customized instructions entered by the publication, the amount due, and the allowable payment options. The Author is also given an area where he may enter notes to the editorial office. If the Submission Fee has been created with multiple Pricing Options (i.e., one rate for society members and a second rate for non-members, or pricing in different currencies), the Author is presented with all the prices and selects the applicable option.

Sample Fees and Payments page

Fees and Payments
"Spinal Cord Injuries in Youth Football Players"

The publication may charge a submission fee and/or page charge or color charge depending on your manuscript's article type. You may pay all fees securely online by credit card. Editorial Manager does not store any sensitive credit card information.

Article Processing Charge for an Open Access Institution

IMPORTANT NOTE! Your manuscript will not be submitted to the journal until you have successfully paid the article processing charge by credit card or requested an institutional waiver.

For more information about our fees, click here: [Our Policies on Article Processing Charges](#)

If you belong to a member institution, please enter your member ID in the Comments to Publication box. If you belong to an institution that is a supporter member, you may request a waiver and the article processing charge will be discounted.

Fee Tracking ID:	EM-STEPHANIEEST72-21		
Payment Status:	Payment Due		
Amount Due:	1995.00 USD		
Pick One:	<input type="checkbox"/> I want to pay in EUR.	1540.00	EUR
	<input type="checkbox"/> I want to pay in GBP.	1425.00	GBP
	<input checked="" type="checkbox"/> I want to pay in USD.	1995.00	USD
Choose Payment Method:	<input checked="" type="checkbox"/> Credit Card <input type="checkbox"/> Request Institutional Waiver		
Comments to Publication:	<div style="border: 1px solid gray; height: 30px; width: 100%;"></div> <div style="text-align: right;">Insert Special Character</div>		

NOTE: The submission will be “gated” (i.e. not submitted to the editorial office) until one of the following takes place:

- a) Successful credit card transaction (Author pays by credit card or his personal PayPal account)
- b) Author selects ‘Bill Me’, indicating he is aware that the Submission Fee is due and is agreeing to pay it at a later time
- c) Author requests a waiver (either a regular waiver or institutional waiver)

When the submission is received by the publication, the editorial office can then decide whether to proceed with the editorial process or send it back to the Author (i.e. asking him to pay the fee before proceeding).

Non-Submission Fee Overview

An Editor/Publisher Role with ‘Edit Fees and Payments’ permission can determine the amount of a Fee (non-submission fee) associated with a particular submission and solicit payment at virtually any point in the editorial or production workflow. The publication can create one or more Fee templates in PolicyManager. Fee templates are similar to letter templates, in that the Editor/Publisher can choose a template to start with, make changes as needed, or enter all new parameters ‘from scratch’.

To generate a non-submission Fee, the Editor/Publisher clicks the ‘Charge Fee’ link found on the *Details* page for a given submission, which brings them to the *Charge Fee* page (Fig 3 below). On this page, the Editor/Publisher may select a Fee template, or enter information from scratch.

The Editor/Publisher enters the fee detail, including a description, the type of currency to be used, and the amount the Author must pay, which may be determined by manually performing any calculations and/or discounts based on the submission. The Editor/Publisher then selects a letter to be sent to the Author, informing him about the Fee. See the ‘Create Letters for use with Commerce Manager’ section of this document for more information on letters and the new merge fields available for use in Commerce Manager letters.

Editor Initiates Page Charge

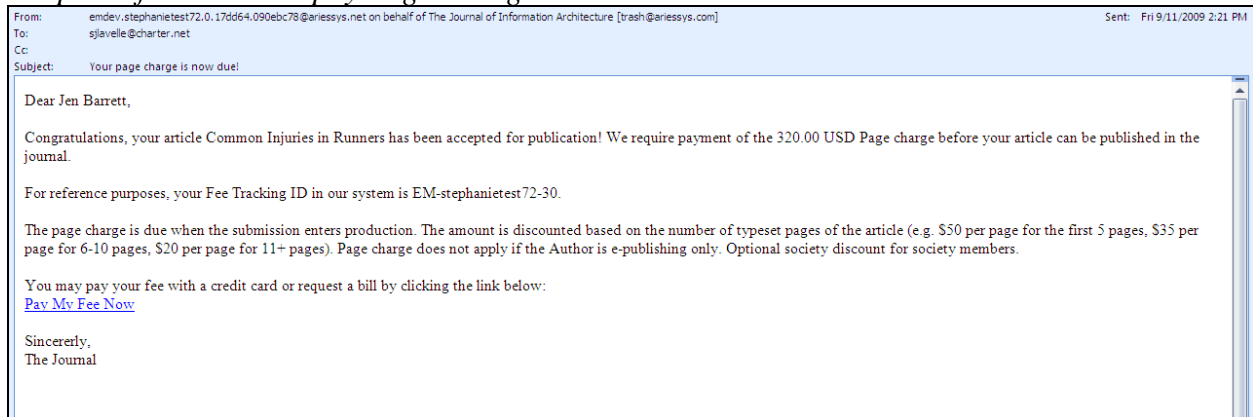
Charge Fee
Manuscript Number: DEMO-D-02-00011
"An Uncommon Complication of a Shoulder Injury"

Choose a Fee Template Page Charge

Fee Description	Insert Special Character <input style="width: 100%;" type="text" value="Page Charge"/> <small>Maximum 255 characters</small>
Currency	USD
Fee Amount	<input style="width: 100%;" type="text"/>
Allowable Payment Methods	<input checked="" type="checkbox"/> Credit Card <input type="checkbox"/> Bill/Check <input checked="" type="checkbox"/> Request Waiver <input type="checkbox"/> Request Institutional Waiver
Payment Instructions	Insert Special Character <input style="width: 100%; height: 40px;" type="text"/>
Payment Due Letter to Author	Page Charge is now due <input type="checkbox"/> This letter serves as the payment invoice
Grant Waiver Letter to Author	None
Deny Waiver Letter to Author	None
Cancel Fee Letter to Author	None
Notes to Author	Insert Special Character <input style="width: 100%; height: 40px;" type="text"/>
Internal Notes	Insert Special Character <input style="width: 100%; height: 40px;" type="text"/>

Upon receipt of the letter, the Author can then log into the system either using the Author Payment deep link (if the deep link was included in the ‘Payment Due Letter to Author’), or manually, and go to the *Fees and Payments* page for the submission.

Deep link for Author to pay Page Charge



The Author can then pay the Fee by credit card, request a bill or request a waiver, depending on which Payment Methods are allowed for the Fee.

Author pays Page Charge

Fees and Payments
Manuscript Number: DEMO-D-02-00011
"An Uncommon Complication of a Shoulder Injury"

Please pay now!

Page Charge

Fee Tracking ID:	EM-STACEYTEST72-32
Payment Status:	Payment Due
Amount Due:	320.00 USD
Choose Payment Method:	<input type="checkbox"/> Credit Card <input type="checkbox"/> Request Waiver

Comments to Publication:

[Insert Special Character](#)

There are three new reports available for managing Commerce Manager:

1. **Bill Me Report** – Editors/Publishers may use this report to view and manage ‘Bill Me’ requests from Authors.
2. **Manage Waiver Requests Report** - Editors/Publishers may use this report to view and manage ‘Waiver’ requests from Authors.
3. **E-Commerce Status Report** – Editors/Publishers may use this report to track credit card payments and reconcile with PayPal. This report is available only for publications that are configured to accept credit card payments.

All three reports allow reporting in the traditional sense, and can also be used as a query function, allowing appropriately authorized users to take action on payment records. For all three reports, the user may download the result set to Excel for further analysis or for sharing

with other departments.