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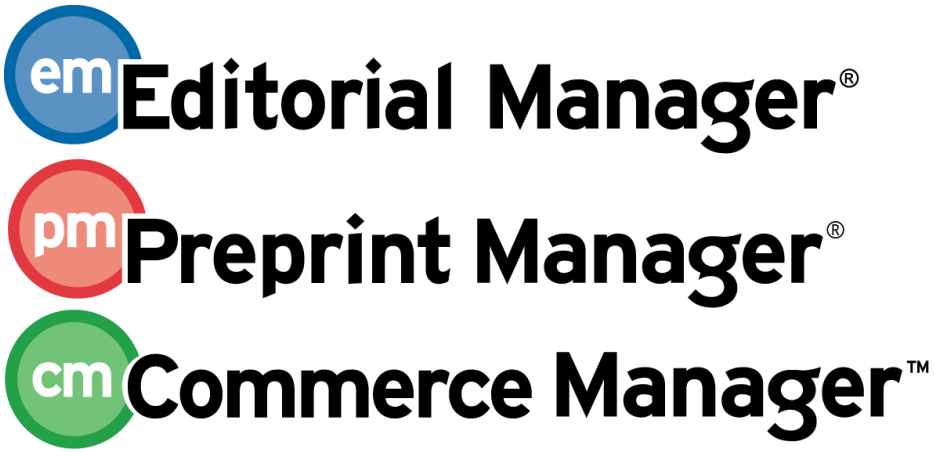

Release Notification

Editorial Manager/Preprint Manager
9.1 General Release Notification
03/29/2012
Draft – Subject to Change

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Document Change Log

Date	Version	Change
12/16/2011	Beta Release	Beta version
01/26/2012	Gamma Release	• Clarify order of sections regarding 'Editor Use Only' Article Types • Include new sections: "Review Questions and Answers Available for Inclusion on Decision Letter" and "Pass Decision Letter up Editor Chain" • Additional Merge Field added to "New Merge Field" section
03/29/2012	General Release	• Minor typographical errors corrected. • Modifications to "Search for Reviewers Suggested by Author" section • Modifications to "Enhanced Search for Reviewers Page" section

Editorial Manager/Preprint Manager 9.1 General Release Notification

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GENERAL ENHANCEMENTS

New Final Disposition Term

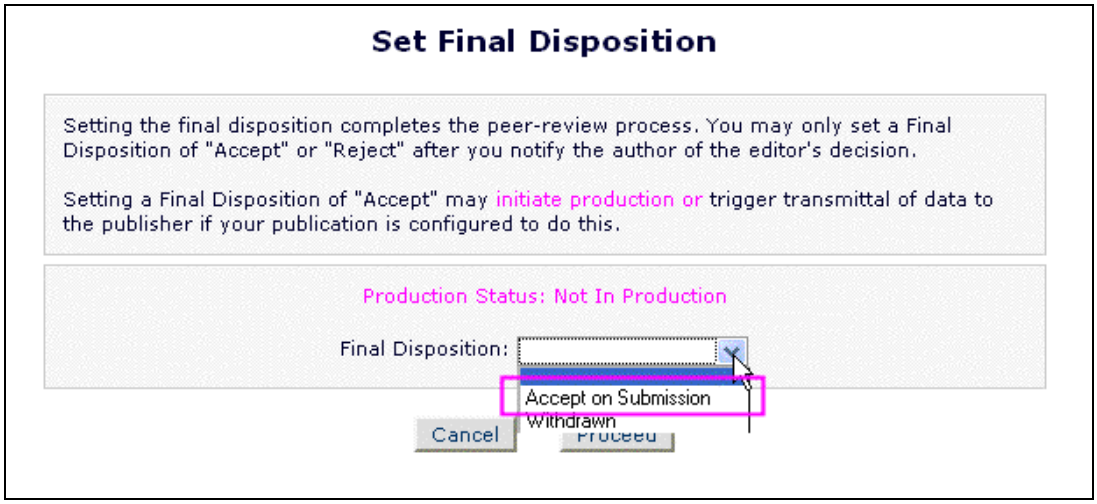
In EM v9.0, the only Final Disposition available for use on a submission prior to the Author being notified is the term 'Withdrawn', which takes the submission out of the review process. In addition, in order to use automated transmittal to a production system, the submission must be assigned to an Editor, an Accepted decision must be made, and an 'Accept' final disposition recorded.

New in v9.1, a final disposition term is added called 'Accept on Submission'. This term is available on all submissions in the Regular submission family prior to the submission being assigned to an Editor. Publications can use this to accept submissions that do not need formal peer review, for example to pass them on to their production system.

This new option is available for any submission that has been submitted to the Editorial Office under the following conditions:

- The submission is new (Revision = 0)
- The submission has been submitted to the publication, and is not currently with the Author
- There are no Editor assignments on the submission
- The submission is in the 'Regular' Article Type family

When an Editor chooses to accept a submission without assigning an Editor, they click the Set Final Disposition link from either the *New Submissions*, *New Submissions Requiring Assignments*, or *Direct-to-Editor New Submissions* folder, or *Search Submissions – Results*. The *Set Final Disposition* page opens in the main window, and the Editor may choose the 'Accept on Submission' option in the dropdown.



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After clicking the 'Proceed' button on this page, a manuscript number is assigned to the submission (unless the publication manually assigns manuscript numbers, in which case the user is navigated to the *Assign Manuscript Number* page), a DOI number is assigned (if the publication is configured to assign a DOI on Author Notification of an Accept Decision), and the submission is moved to the *All Submissions with Final Disposition* folder and the *All Submissions with Final Disposition: Accept* folder.

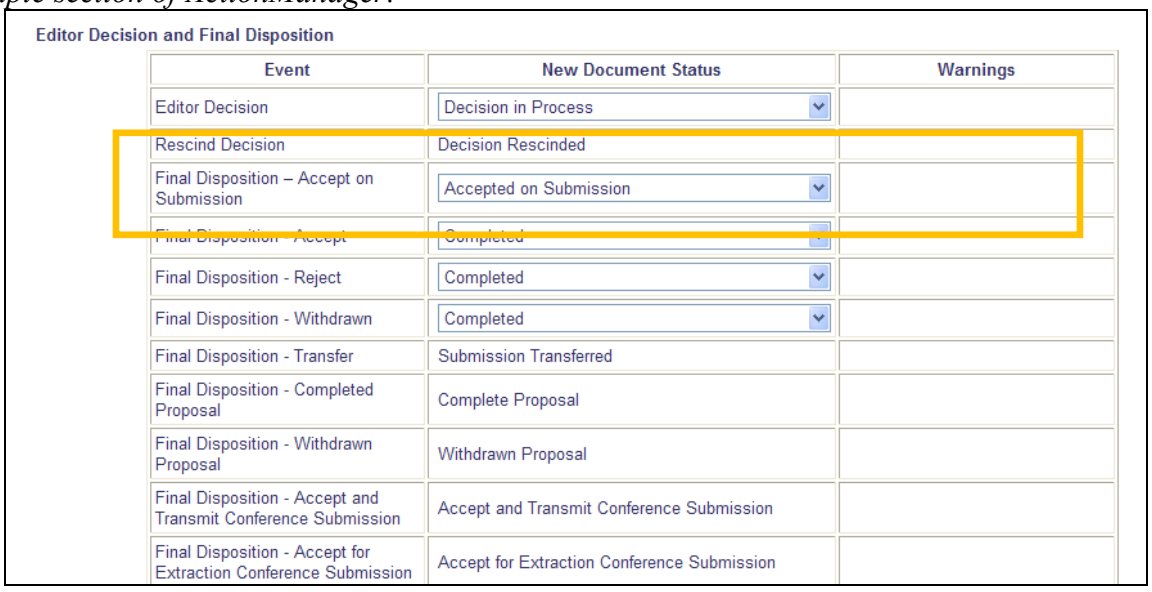
For publications using Production Tracking, this feature can be used in conjunction with the new Automate Initiate Production feature to automatically initiate production on this submission as well.

NOTE: Use this feature in conjunction with the new 'Submit as an Editor' functionality (see the 'Editors Can Submit Manuscripts' section of these release notes) to allow Editors to set this final disposition during the submission process (for certain Article Types).

TO CONFIGURE:
No configuration is necessary to add this final disposition term on upgrade. Users with access to newly submitted manuscripts and with 'Set Final Disposition' permission enabled will have this option available.

A new event is added to ActionManager called 'Final Disposition – Accept on Submission' with a default status of "Accepted on Submission" added to the system. When this event is triggered, letters will only be sent to the Corresponding Author, and to any Publisher Roles configured with a letter. There are no Reviewers associated with a submission with this Final Disposition set, nor are there any Editors attached to this submission. In the case where the submission is an Editor Submitted Manuscript, the Editor is considered the Corresponding Author. No letters are associated with this event on upgrade.

Sample section of ActionManager:



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Editors Can Submit Manuscripts

In EM v9.0, an Editor who wishes to submit a manuscript into EM must switch to their Author Role, and then submit as normal. When they do so, logic built into EM to preserve the integrity of the peer-review process prevents the submission from being assigned to the same person for processing. In many cases, the Editor who uploads the submission wants to be able to release it to production without further processing, however the submission must be assigned to an Editor in order to proceed through the Peer Review process.

New in EM v9.1, Editor roles may be given permission to "Submit Manuscripts as an Editor", which allows them to submit manuscripts directly into EM (using the 'Submit a Manuscript' option in the Navigation Bar) without having to log in as an Author role. When an Editor (with this permission) clicks the 'Submit a Manuscript' option in the Navigation Bar, they are brought to the existing Submit Manuscript interface. Once submitted, the manuscript will be a normal submission with the Editor recorded as the Corresponding Author.

Additionally, a new sub-permission is available called "Restrict to 'Editor/Publisher Use Only' Article types". When this additional sub-permission is enabled, Editors using the 'Submit a Manuscript' option are limited to only those Article Types created with the new "Editor Use Only" option selected.

NOTE: Editor Use Only submissions can be sent through the peer-review process, however before approving, the Editor will not see the 'I agree' checkbox (if configured for the publication).

When an Editor begins a manuscript, and if they do not complete the submission or build the PDF to be approved later, those submissions display on the Editor's Main Menu in a new folder called *Editorial Submissions in Progress.*

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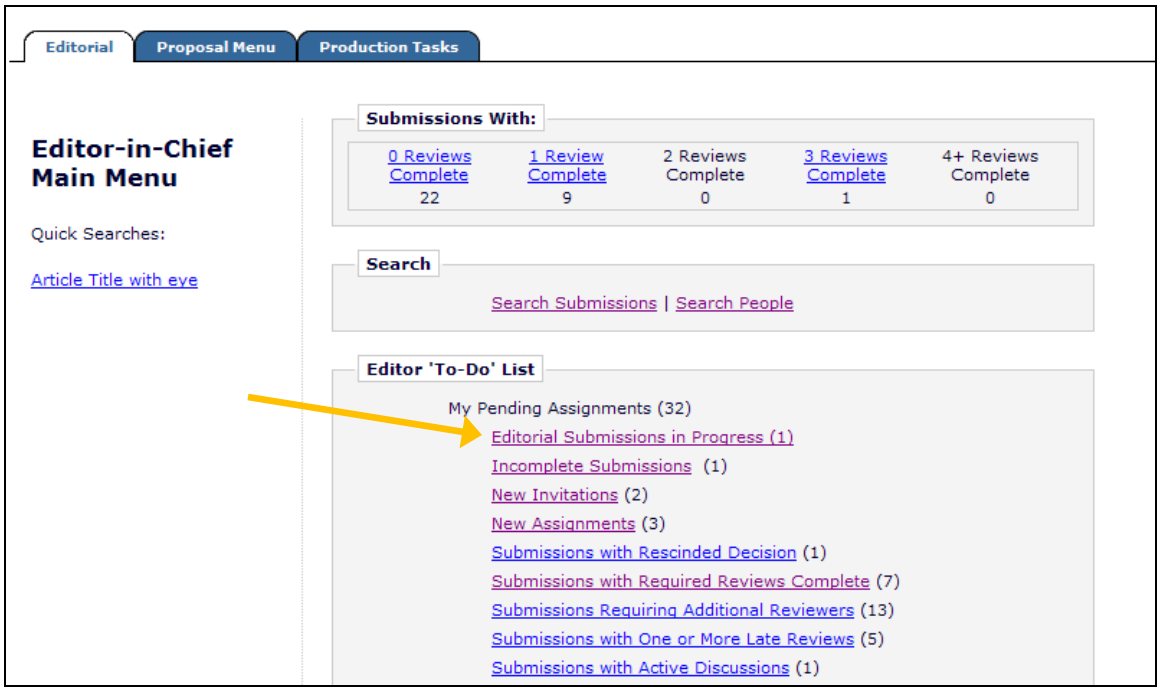
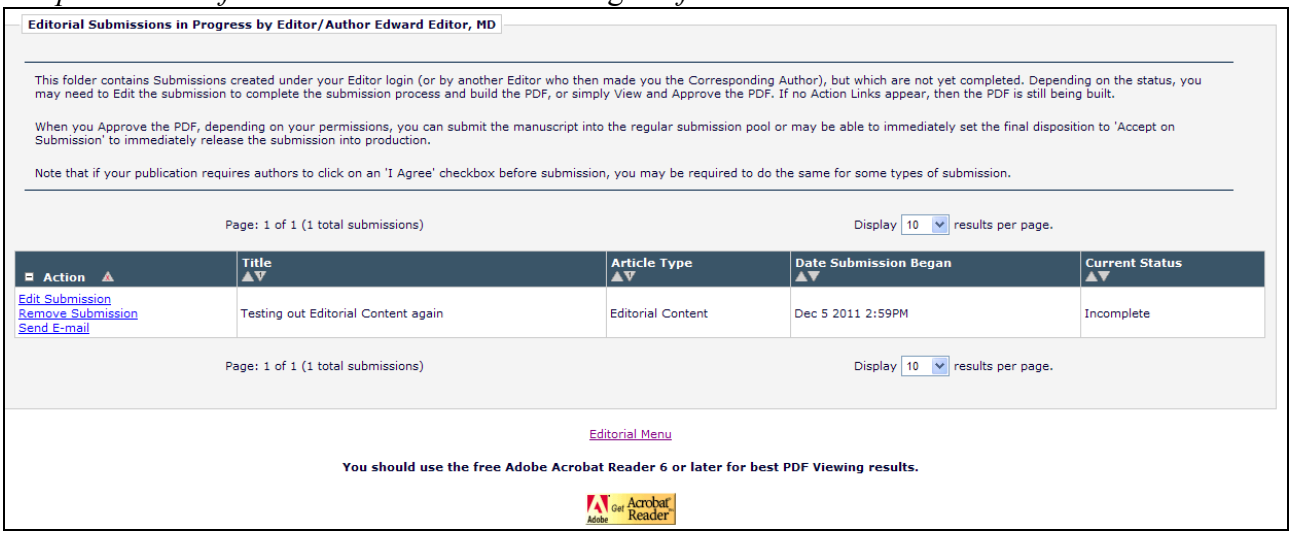
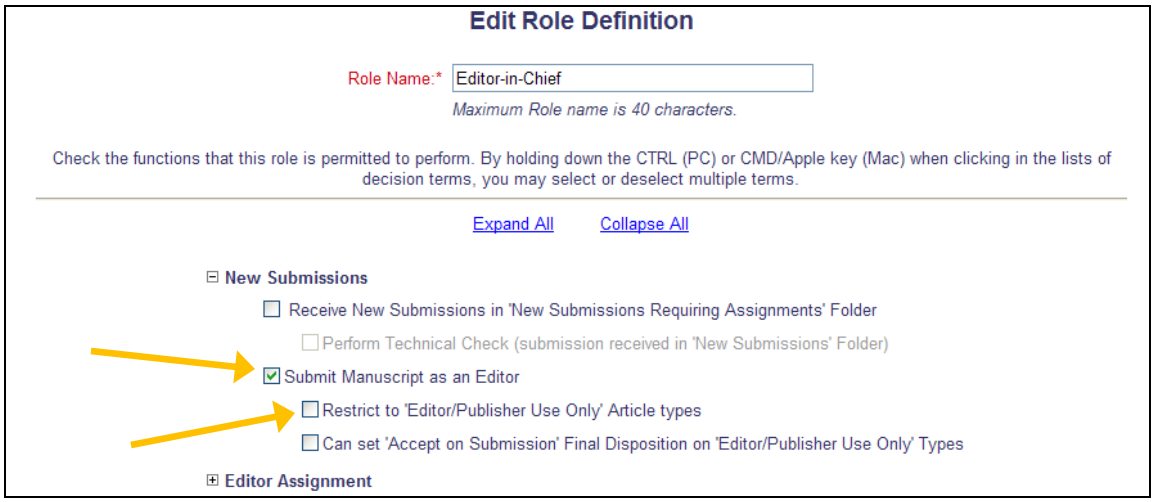


Sample version of Editorial Submissions in Progress *folder:*



TO CONFIGURE:
To allow Editor roles to submit manuscripts as an Editor, in RoleManager, select the Editor role to be given this permission, and select/check the new 'Submit Manuscript as an Editor' permission (disabled on upgrade).



To limit the Article Types from which Editors may make a selection, set/check the 'Restrict to 'Editor/Publisher use Only' Article Types sub-permission.

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‘Editor Use Only’ Article Types

Publications may at times wish to be able to change an Article Type initially selected by the Author to an Article Type that the Author cannot then change, e.g., to change a submission to a special ‘Fast-Track’ Article Type that the Author cannot initially select.

New in EM v9.1, a new ‘Editor Use Only’ setting is added to the Article Type configuration page. This is available for Regular Article Types or Conference Submissions, and can be used in conjunction with the ‘Invited’ setting.

- When an Author initially submits a manuscript, they will not see Article Types configured as ‘Editor Use Only’
- When an Editor or Publisher Edits a submission, they will see all Article Types, including those configured as ‘Editor Use Only’
- When a submission which has been Edited by the publication and changed to an ‘Editor Use Only’ Article Type is returned to an Author, e.g. for revision, the Author is not allowed to change the Article Type

When Editors or Publishers edit an existing submission, the ‘Editor Use Only’ Article Types display in the Article Type Dropdown prefixed with an asterisk(*).

When the submission is sent back to the Author with a Revise decision (or on initial receipt and technical check), then the ‘Select Article Type’ page is suppressed and the Author cannot change the Article Type on revision. The system displays the ‘Enter Title’ page instead to the Author.

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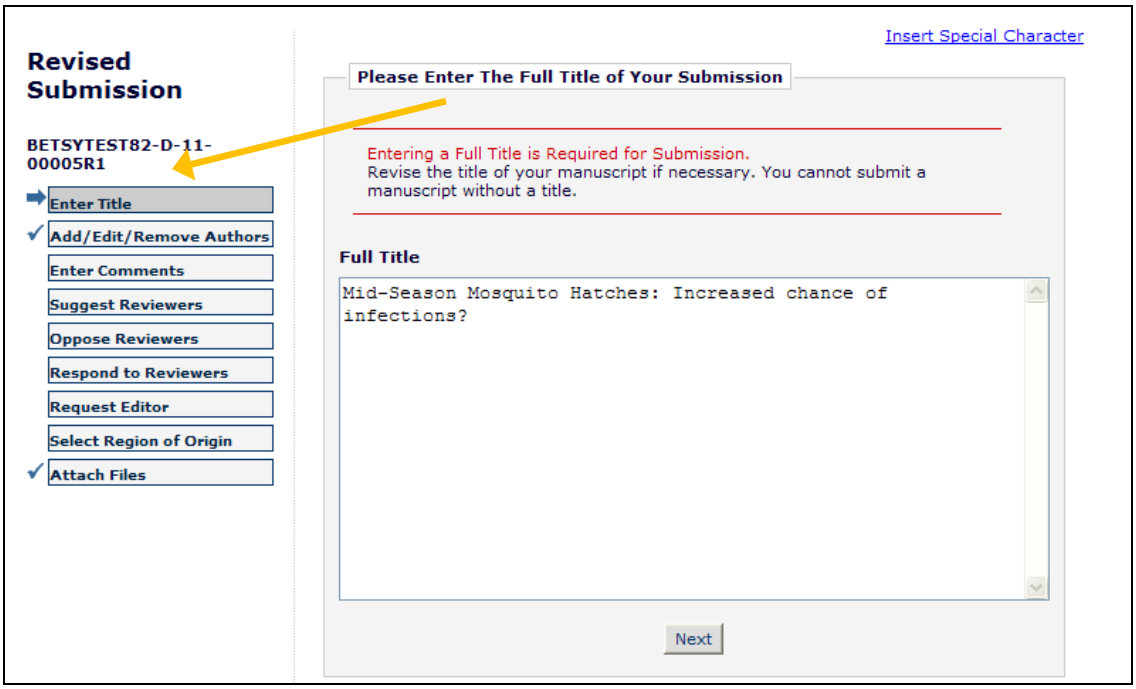


TO CONFIGURE:
To create an Article Type for Editor Use Only, go to PolicyManager, Edit Article Type, and edit an existing Article Type or add a new Article Type.

On the *Edit Article Type* page, select/check the new 'Editor Use Only' checkbox.

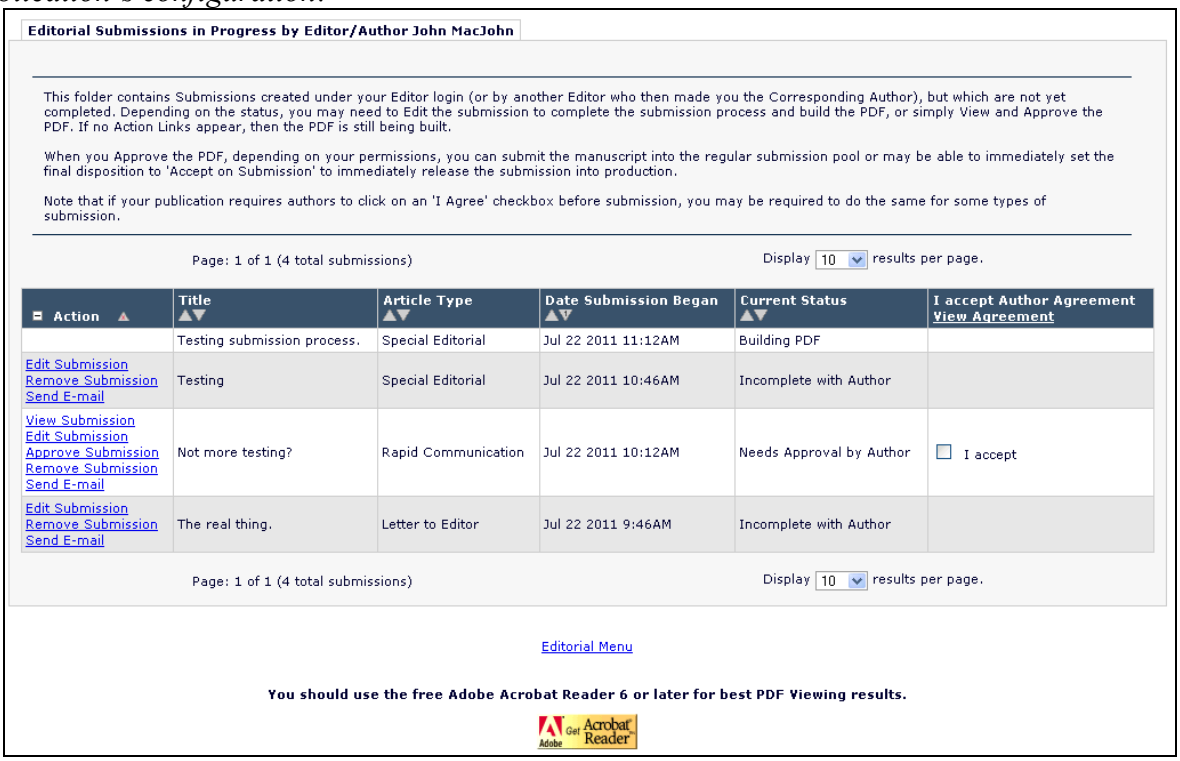
NOTE: This setting is active only when the Family is set to Regular OR Conference Submission; it is disabled when the Family is set to Proposal.

Editor Use Only Article Type and Editorial Submission

For manuscripts submitted by Editors, the 'Editor Use Only' Article Types have the following additional functionality:

- Editors can be restricted to only Article Types configured as 'Editor Use Only'
- Editors can be permitted to set the final disposition to 'Accept on Submission' for Article Types configured as 'Editor Use Only'. This triggers all functionality related to an Accept final disposition.
- When approving 'Editor Use Only' Article Types for submission (and before optionally setting the Final Disposition), 'Editor Use Only' Article Types ignore the settings for any 'I Agree' checkboxes (if configured for a publication) when displaying the submission in the *Editorial Submissions in Progress* Folder.

Sample page - actual terms displayed in the column header, and by the checkbox, depend on the publication's configuration:



Editorial Submissions in Progress by Editor/Author John MacJohn

This folder contains Submissions created under your Editor login (or by another Editor who then made you the Corresponding Author), but which are not yet completed. Depending on the status, you may need to Edit the submission to complete the submission process and build the PDF, or simply View and Approve the PDF. If no Action Links appear, then the PDF is still being built.

When you Approve the PDF, depending on your permissions, you can submit the manuscript into the regular submission pool or may be able to immediately set the final disposition to 'Accept on Submission' to immediately release the submission into production.

Note that if your publication requires authors to click on an 'I Agree' checkbox before submission, you may be required to do the same for some types of submission.

Page: 1 of 1 (4 total submissions) Display 10 results per page.

Action	Title	Article Type	Date Submission Began	Current Status	I accept Author Agreement View Agreement
	Testing submission process.	Special Editorial	Jul 22 2011 11:12AM	Building PDF	
Edit Submission Remove Submission Send E-mail	Testing	Special Editorial	Jul 22 2011 10:46AM	Incomplete with Author	
View Submission Edit Submission Approve Submission Remove Submission Send E-mail	Not more testing?	Rapid Communication	Jul 22 2011 10:12AM	Needs Approval by Author	I accept
Edit Submission Remove Submission Send E-mail	The real thing.	Letter to Editor	Jul 22 2011 9:46AM	Incomplete with Author	

Page: 1 of 1 (4 total submissions) Display 10 results per page.

Editorial Menu

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

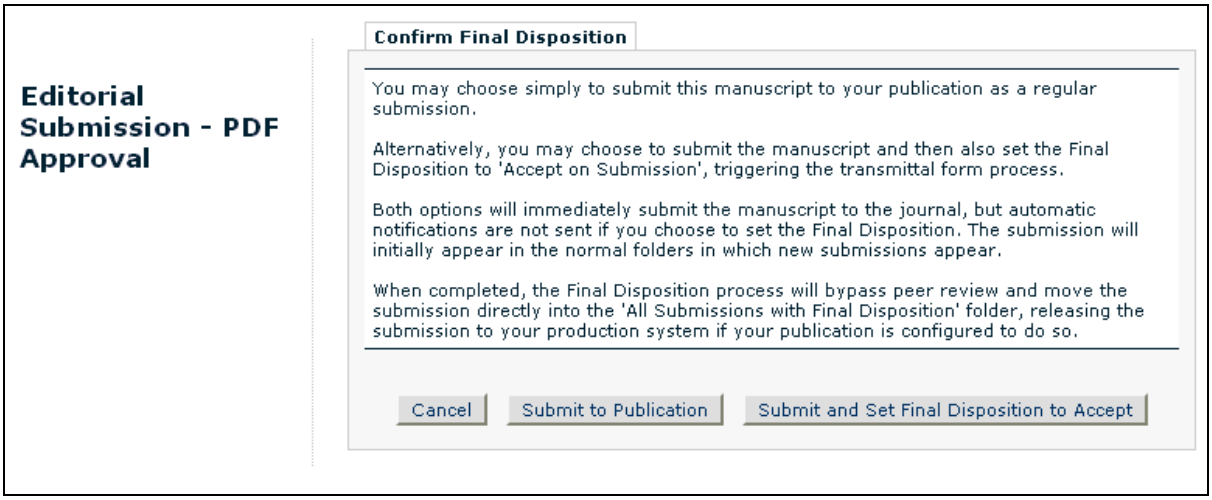
Get Acrobat Reader

Accept Submissions during Editorial Submission Process

When submitting a manuscript, Editors can be permitted to set the Final Disposition to 'Accept on Submission' as part of the submission process. This option applies ONLY to Article Types configured with the new 'Editor Use Only' setting.

When the Editor goes to View and Approve their 'Editor Use Only' Article Type submission, then if the Editor has the new 'Can set 'Accept on Submission' Final Disposition on

'Editor/Publisher Use Only' Types' permission enabled, at the point they Approve their submission, the system further asks them whether they want to set the Final disposition to Accept:



If the Editor selects 'Submit to Publication', the manuscript is submitted to the Editorial Office, and is moved to the appropriate 'New Submissions…' folder. The submission may then be put through the peer review process (or Accepted on Submission by the editorial staff).

If the Editor selects 'Submit and Set Final Disposition to Accept', the system will take them through the standard transmittal process. As part of this, the system:

- Generates or requests a manuscript number, depending on the publication's configuration.
- Generates a DOI if the publication is configured to trigger DOI generation on Notifying the Author.

The submission will end up in the 'All Submission with Final Disposition: Accept' folder.

If the Editor does NOT have this new permission enabled, or if they are submitting an Article Type that is not configured as 'Editor Use Only', then the submission proceeds exactly as if the Editor were submitting from an Author role.

TO CONFIGURE:
In Editor RoleManager, set/check the new 'Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types' permission.

This sub-permission controls whether the Editor can set the final disposition to 'Accept on Submission' as part of the submission approval process, i.e. to approve the PDF (submitting to the publication) and accept a submission in the same action. This is allowed only for 'Editor Use Only' Article Types. Setting the final disposition in this way triggers any automatic transfer to a production system, or to PM Production Tracking if the new 'Automatic Production Initiation' setting is set (see the 'Automated Initiate Production Process' section of these release notes).

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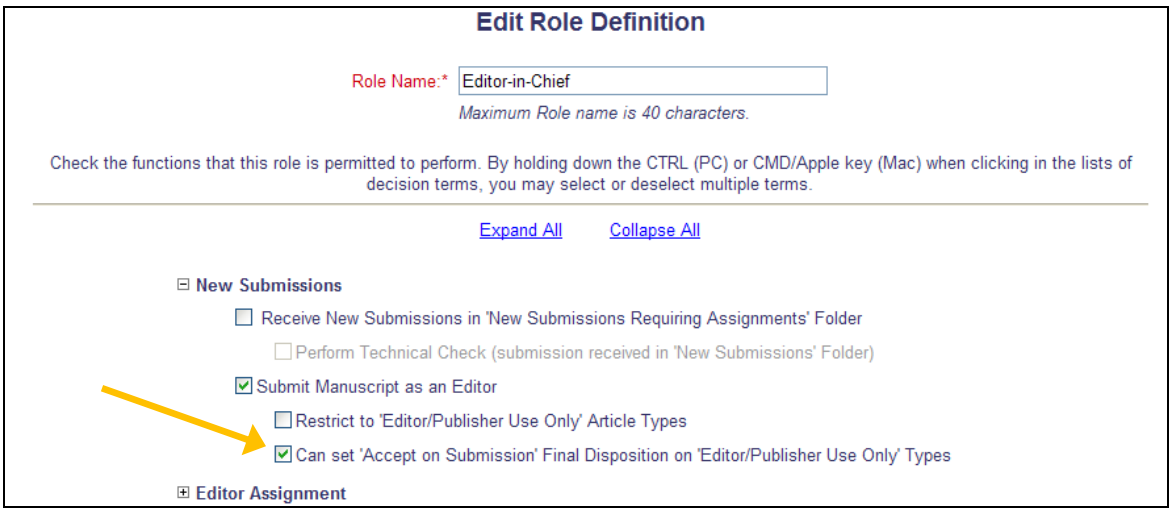
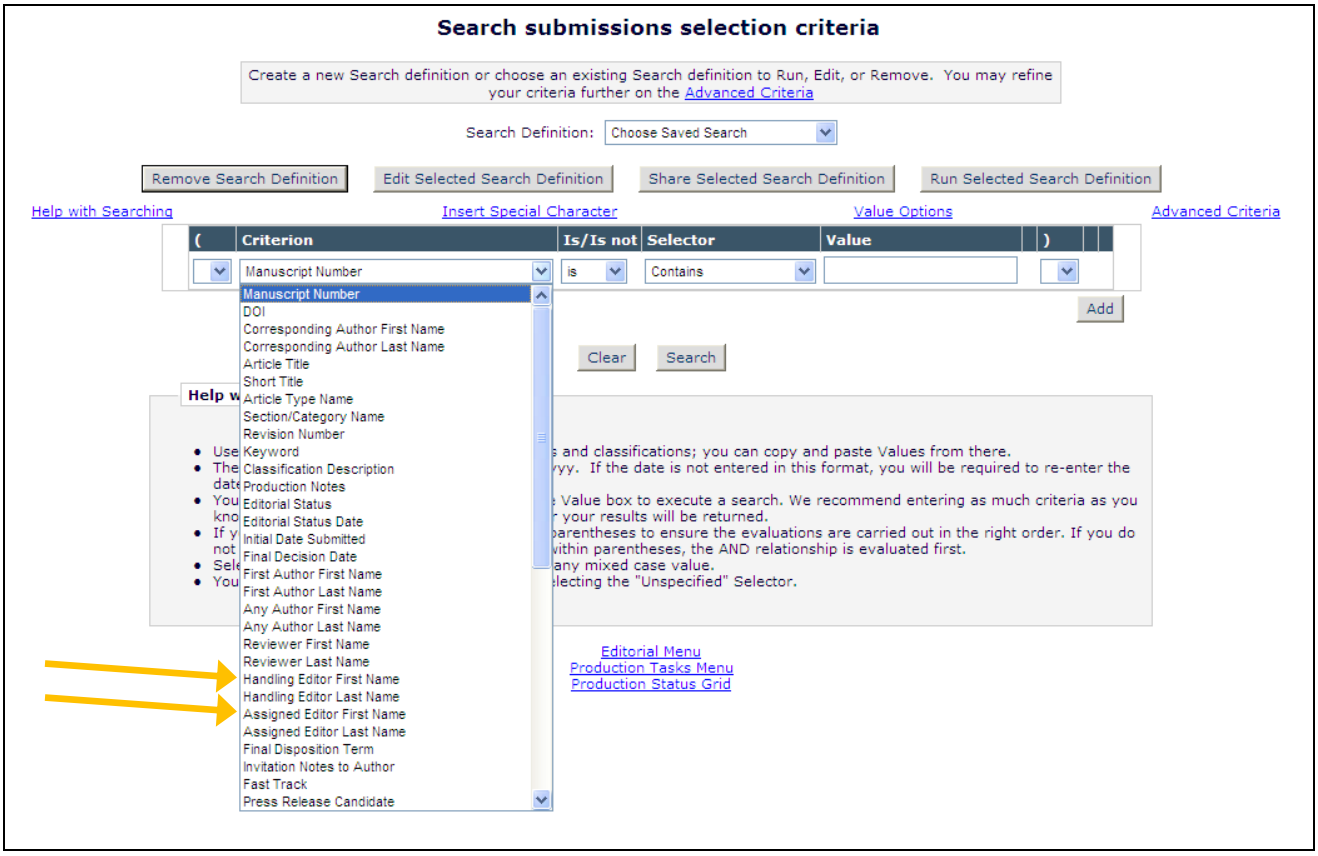

Edit Role Definition
Role Name:*
Editor-in-Chief
Maximum Role name is 40 characters.
Check the functions that this role is permitted to perform. By holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking in the lists of decision terms, you may select or deselect multiple terms.
Expand All
Collapse All
New Submissions
Receive New Submissions in 'New Submissions Requiring Assignments' Folder
Perform Technical Check (submission received in 'New Submissions' Folder)
Submit Manuscript as an Editor
Restrict to 'Editor/Publisher Use Only' Article Types
Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types
Editor Assignment

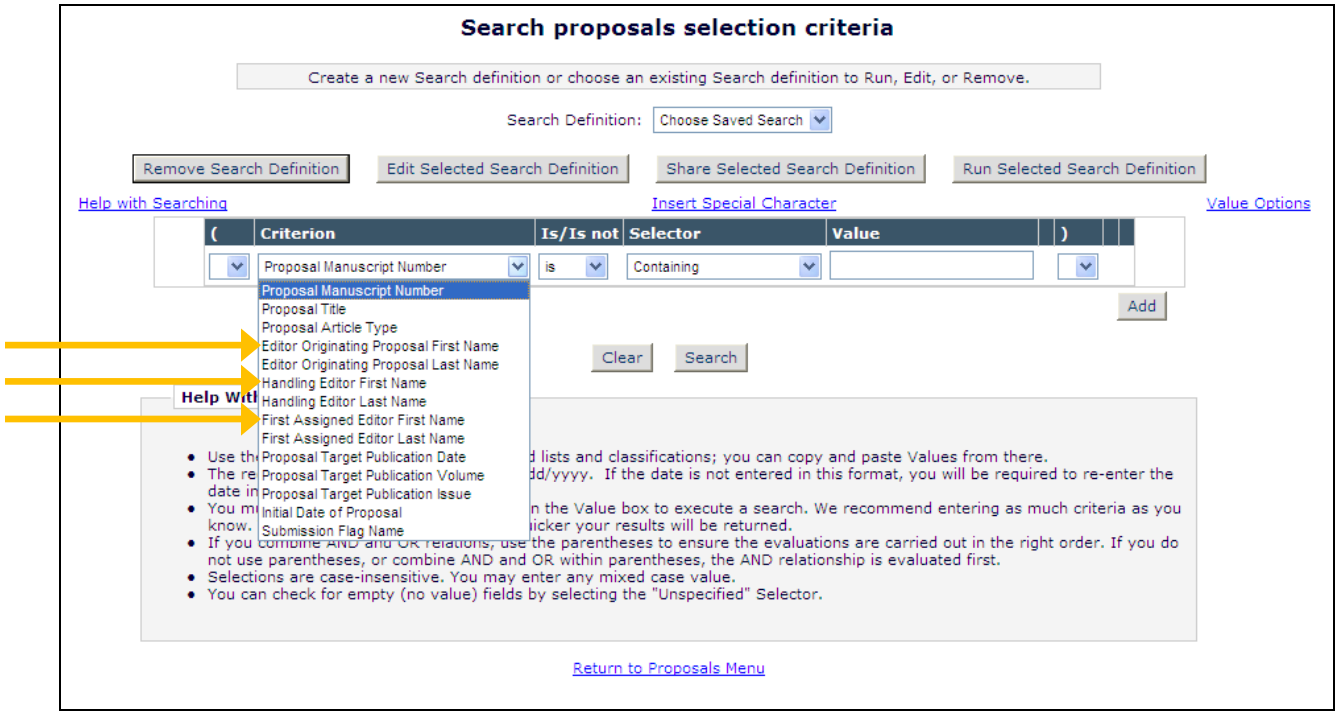
Additional Search Criteria

Users of EM/PM have many options by which they can search for Submissions, Proposals, or Reviewers. New in EM/PM v9.1, the following additional search criteria are added:

1. Search Submissions / Search Production Submissions
   a) Handling Editor First Name
   b) Assigned Editor First Name



2. Search Proposals
    a) Editor Originating Proposal First Name
    b) Handling Editor First Name
    c) First Assigned Editor First Name



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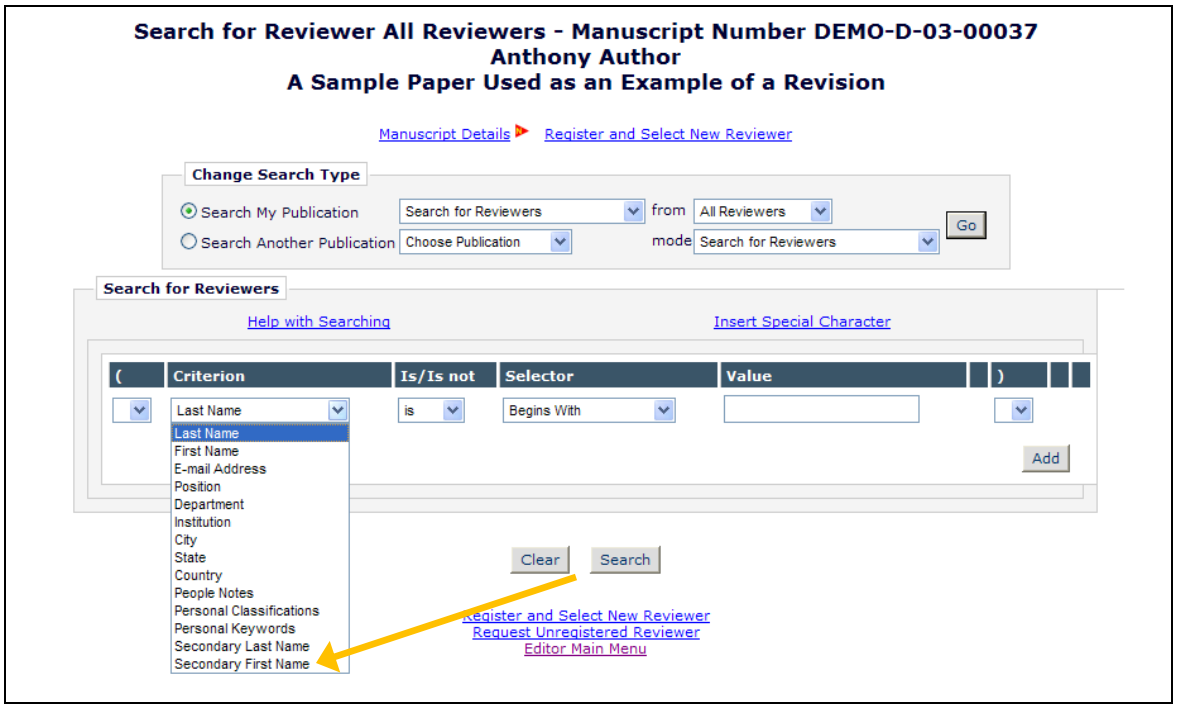
3. Search for Reviewers
    a) Secondary First Name

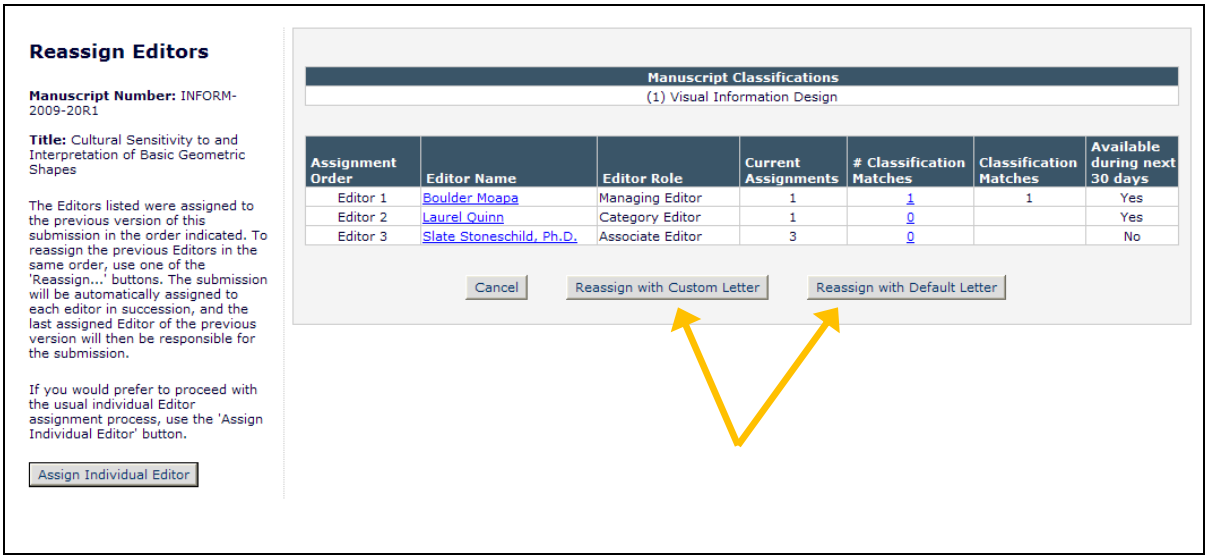


TO CONFIGURE:
No configuration required. These new fields are available for searching on upgrade.

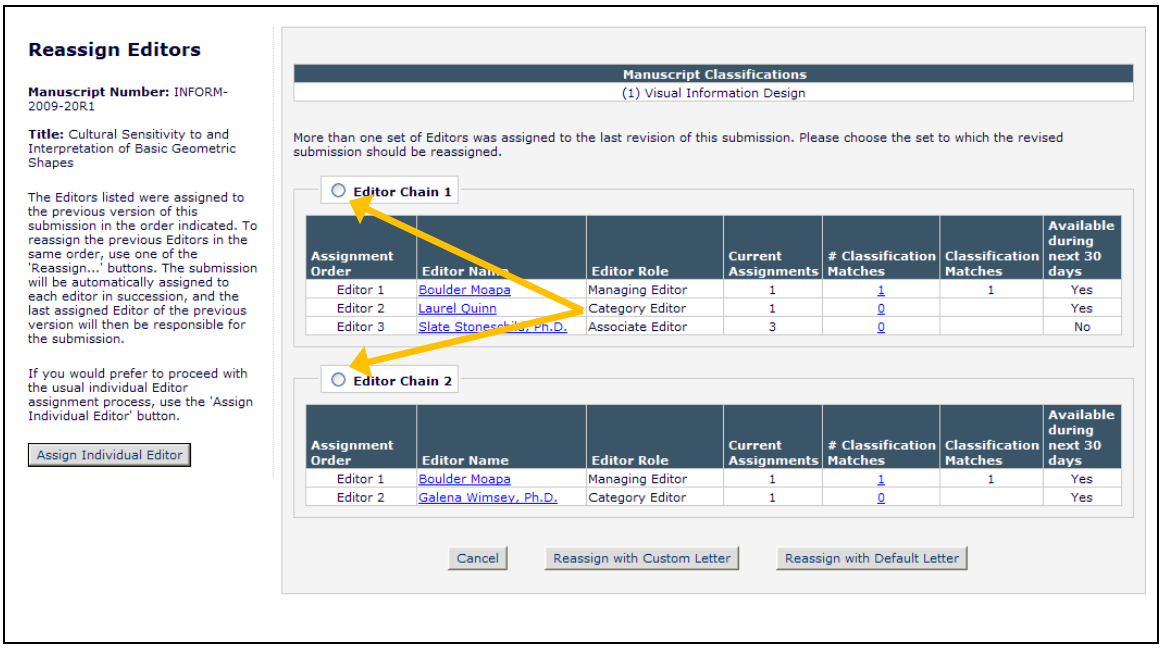
Reassign Editor Chain

For some publications, a revised submission is often handled by the same set of Editors as previous versions, but does not require any action by the upper-level Editors until it is time to make a decision. New in EM v9.1, Publications now have the ability to re-assign an entire Editor Chain from a previous revision of a submission with the assignment (and optional notification) going to the last assigned Editor of the previous version.

When this new feature is enabled, then when the Editorial Office clicks the Assign Editor link from the *Revised Submissions Requiring Assignment* folder, a new *Reassign Editor* page opens. This page displays the Editor Chain from the prior version of the submission. The user may then choose to Reassign the Editor Chain and customize the letter that will go to the lowest Editor in the chain, or Reassign the Editor Chain and send the default letter to the lowest Editor in the chain.



In the event the prior version of the submission had multiple Editor Chains assigned, the user is presented with all chains and asked to select one to use for the revision.



Alternately, if the user does not want to assign an entire chain, he can click the 'Assign Individual Editor' button to be brought to the standard *Assign Editor* page to select an Editor for assignment.

NOTE: If any editor from the previous version is no longer available (e.g. their editor role was removed or changed), the page is displayed as follows:

- If there is at least one Editor Chain for which all the Editors are still available, these intact Editor Chains are displayed
- If there are no intact Editor Chains for the previous version, a warning is displayed, and the user must click the 'Assign Individual Editor' button to continue

NOTE: When this new feature is used, Editors are assigned to the submission, even if their role is configured to receive Invitations.

TO CONFIGURE:
To enable the new feature, go to PolicyManager, Set Editor Assignment Options , and go to the 'Revised Submissions' section of the page. In prior versions of EM, publications could select the "Revisions are automatically directed to the First Assigned Editor of the previous version" option to have revisions directly sent to the prior Editor. The default setting of having Revisions go to the *Revised Submissions* or *Revised Submissions Requiring Assignments* folder (previously set behind the scenes and not directly on the page) is now displayed on the page (functionality is not changed). The new "Allow reassignment to previous Editors" sub-option can be selected, allowing Editors the option of assigning the entire chain from the prior version of the submission.

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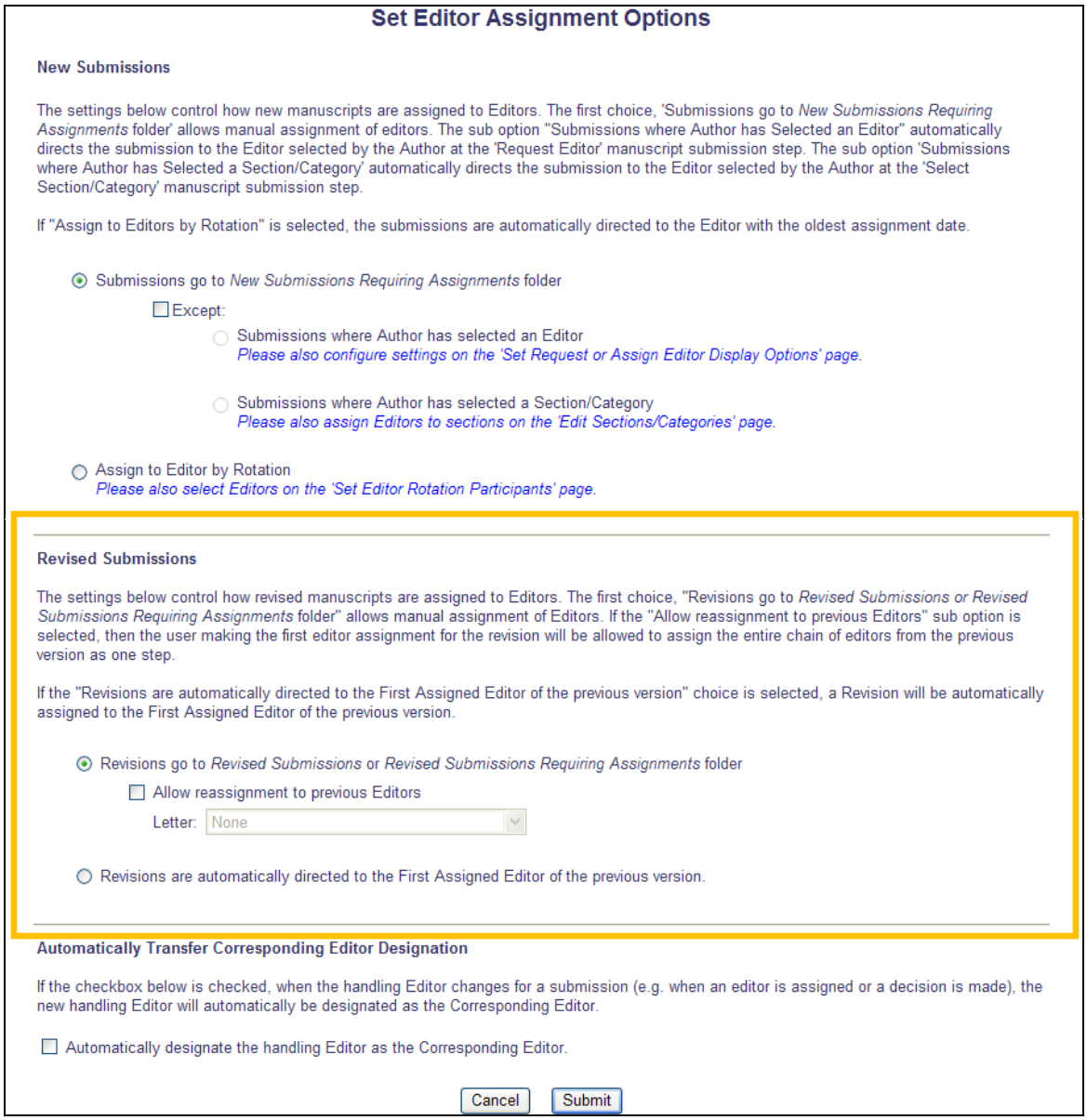

A 'Letter' drop-down is displayed beneath the sub-option. When an Editor Chain is selected, the user has the option to send the default letter to the last Editor in the chain or customize the letter. If no letter is selected here, and the user chooses to send the Default letter, then no letter will be delivered, but the status of the submission will change.

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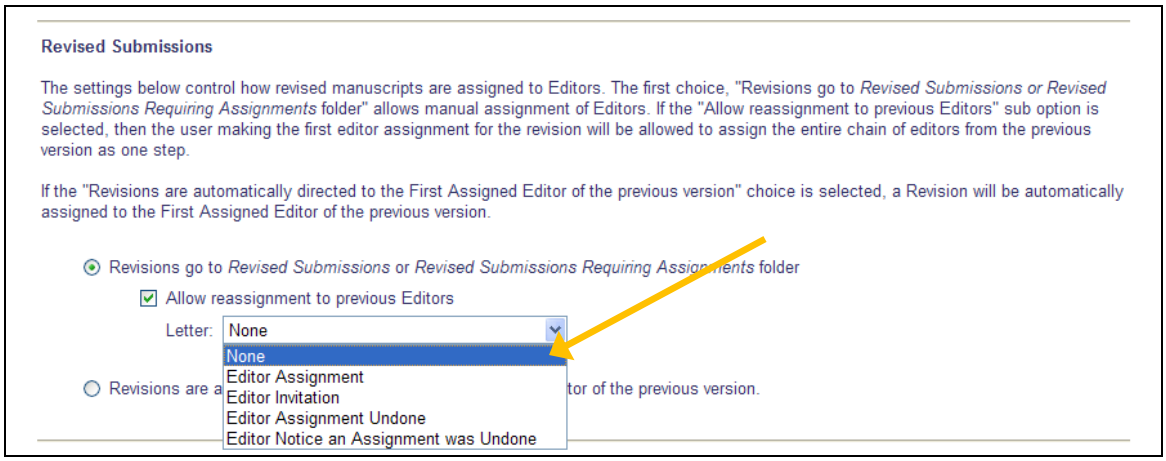
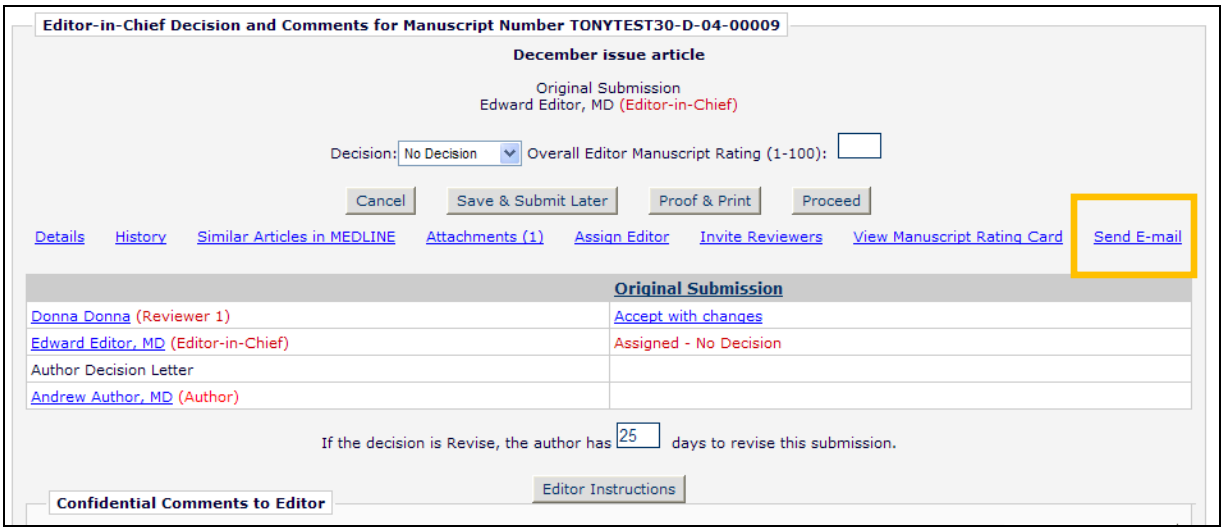

Revised Submissions
The settings below control how revised manuscripts are assigned to Editors. The first choice, "Revisions go to Revised Submissions or Revised Submissions Requiring Assignments folder" allows manual assignment of Editors. If the "Allow reassignment to previous Editors" sub option is selected, then the user making the first editor assignment for the revision will be allowed to assign the entire chain of editors from the previous version as one step.
If the "Revisions are automatically directed to the First Assigned Editor of the previous version" choice is selected, a Revision will be automatically assigned to the First Assigned Editor of the previous version.
Revisions go to Revised Submissions or Revised Submissions Requiring Assignments folder
Allow reassignment to previous Editors
Letter:
None
None
Editor Assignment
Editor Invitation
Editor Assignment Undone
Editor Notice an Assignment was Undone
Revisions are a
tor of the previous version.

Additional Link Visibility for Editors

New in EM v9.1, Editors (with proper permission) now have the ability to send an Ad Hoc e-mail from the *Editor Decision* page, and also have access to the 'Similar Articles in MEDLINE' and 'View Submission' links from the *Reviewer Selection Summary* page.

If the logged-in Editor has the 'Send Ad Hoc E-mail' permission and there is at least one letter configured in the "Ad Hoc from Editor" Letter Family, then the Editor will see the Send E-mail link located at the top of the *Decision and Comments* page.



On the *Reviewer Selection Summary* page, Editors with "Search Similar Articles in MEDLINE" permission enabled will see the Similar Articles in MEDLINE link (when the submission is not currently in an incomplete status). All Editors will see the View Submission link (when the submission is not currently in an incomplete status).

TO CONFIGURE:
No configuration required. Editors with proper permissions will see the links described above.

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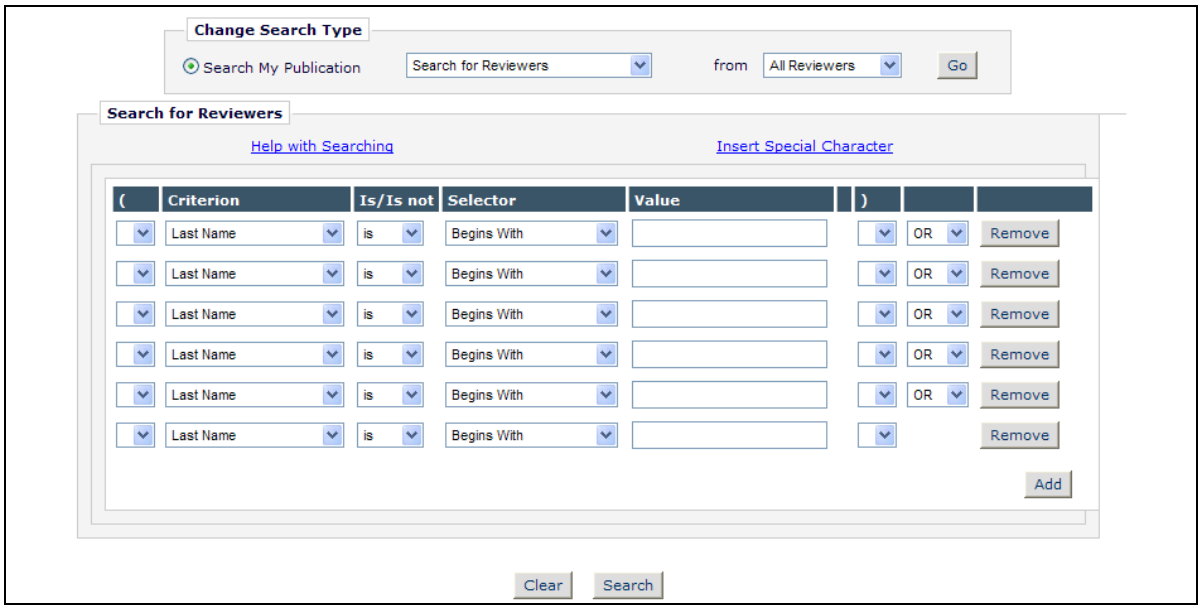
Enhanced Search for Reviewers Page

New in EM v9.1, the Search Reviewers interface has been enhanced to support Boolean logic and an unlimited number of search criteria. Editors may add as many rows to the search as they wish, and may use the AND/OR selector, as well as parenthesis, for more refined searching. NOTE: You do not need to Remove extra lines of unused criteria before executing the search.



TO CONFIGURE:
No configuration is required to use this feature. Editors with permission to search for Reviewers will see the enhanced Search Reviewers layout.

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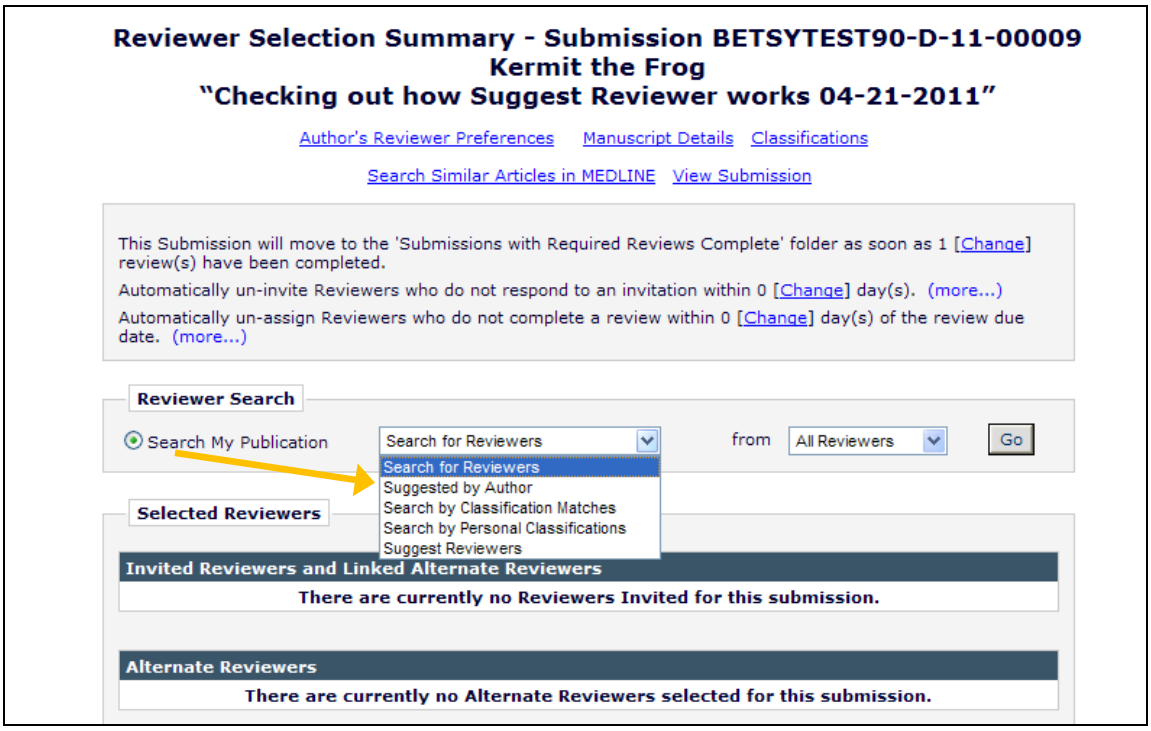
Search for Reviewers Suggested by Author

In EM v9.0, publications can enable the 'Suggest Reviewers' submission step allowing Authors to 'suggest' one or more Reviewers that they feel would be suitable to review the paper. The publication may specify the Article Type(s) for which Authors are allowed to Suggest Reviewers, and can also specify which fields are required to be filled in before the Author can submit his manuscript. Some customers rely heavily on the Reviewer suggestions made by the Author, yet there has not been a simple way to search for those suggested Reviewers.

New in EM v9.1, a new search mode called 'Suggested by Author' is added to all Reviewer Search pages as long as the Author has suggested at least one Reviewer.



When this search mode is used, the system takes the E-mail Address(es), Last Name(s), and First Name(s) entered by the Author on the Suggest Reviewers submission step and executes a query to identify possible matches in the system. The results page includes a list of all possible matches based on the above, and are displayed based on the following criteria, exposed in three "levels" so that the user is presented with a manageable number of Reviewers (i.e. best possible matches first) on the page:

- Level 1: If a suggested Reviewer has an exact e-mail match to a person in the database, s/he is returned first in the result set. These results are displayed in the search results grid. Below these matches is a '[+] See More Matches (First & Last Name)' link. Clicking this link opens the Level 2 matches. This link is only displayed if there are additional Reviewers in the result set with an exact match on First and Last Name.
- Level 2: If a suggested Reviewer has an exact match on first name and last name, it is returned next in the results. NOTE: If there is a match on e-mail, first name, and last

name, the reviewer will only be returned once, in the e-mail match section of the result set. Below these matches is a '[+] See More Matches (First Initial & Last Name)' link. Clicking this link opens the Level 3 matches. This link is only displayed if there are additional Reviewers in the result set with a match on First Initial and Last Name.

- Level 3: If a suggested Reviewer has a match on last name and first initial only, s/he is returned in the result set below the first name and last name match set.

The results are returned in this way with the assumption that a match on John Smith with the e-mail address jsmith@harvard.edu (Level 1 match) is more relevant than 14 other Reviewer candidates with names like Jane Smith, Jolene Smith and Jasper Smith (Level 3 match). The Level 3 matches are not immediately shown to the user, but the user can quickly expand these results to look deeper into the candidate pool, without having to rerun the query.

A new 'Reviewers Suggested by Author' area is also displayed, listing the Reviewer information against which the query is run.

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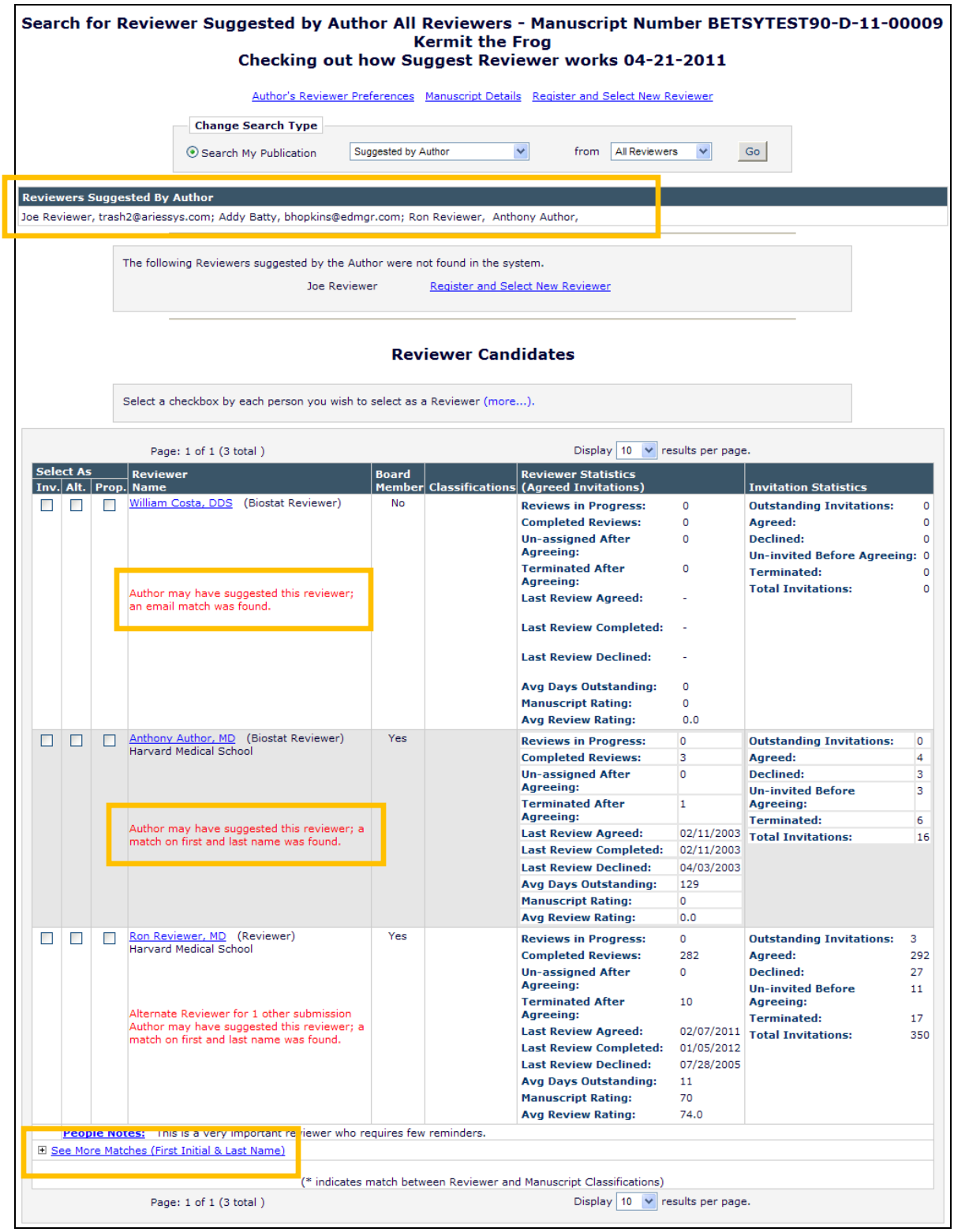
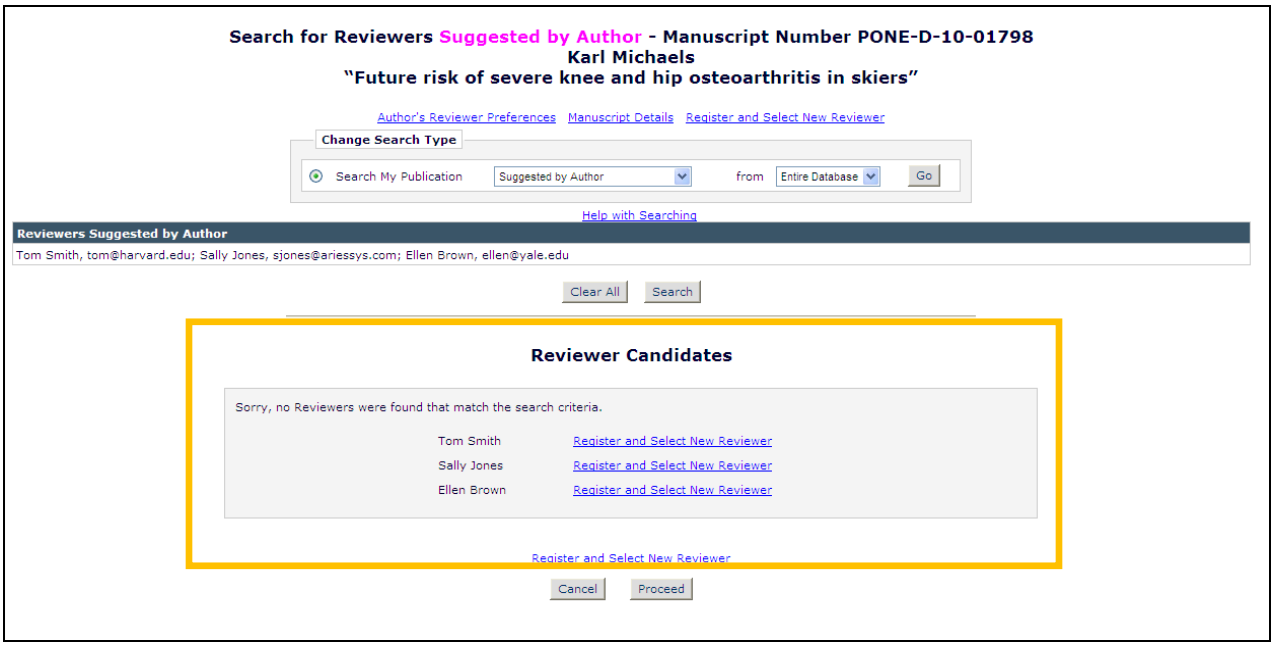


NOTE: The Author's Reviewer Preferences link still displayed at the top of the page.

If any Reviewers suggested by the Author do not return any matches, a new section is displayed that lists each Reviewer with a Register and Select New Reviewer link next to each person's name, so that the user can easily register the person and select them as a Reviewer for the submission. Clicking this link is just like clicking the existing Register and Select New Reviewer link, except that the Proxy Registration page is pre-populated with the First Name, Last Name and E-mail Address of the Reviewer suggested by the Author.

NOTE: The new search mode is also available when searching another publication with which Reviewer Sharing is established.



TO CONFIGURE:
No configuration is required to use this feature. When an Article Type is configured to allow Authors to Suggest Reviewers, and the Author has suggested at least one Reviewer, then the Editor will have the new 'Suggested by Author' option in the drop-down when searching for a Reviewer.

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My Reviewer Display Option Enhancements

In EM v9.0, Editors with permission to Invite or Propose Reviewers may search for Reviewer Candidates based on various selection criteria. Editors may select a Reviewer Candidate sort preference on the *My Reviewer Display Options* page from three available sort order options. When using the 'Suggest Reviewer' search option, the order in which Reviewer Candidates are displayed is defined on the *My Suggest Reviewers Preferences* page.

New in EM v9.1, Editors have additional configuration options to define the Reviewer Candidate display order. The *My Reviewer Display Options* page now provides Editors with new options to use for ranking the order in which Reviewer Candidates are displayed on search results pages.

- Ascending Reviewer Name
- Number of Matches to Manuscript Classifications (Most matches displayed first)
- Board Membership (Board Members listed first)
- Average Review Rating (Highest Ratings listed first)
- Total Number of Completed Reviews (Highest number displayed first)

Editors may define multi-level sorting preferences, i.e. Primary, Secondary, and Tertiary etc., using the number entry boxes.

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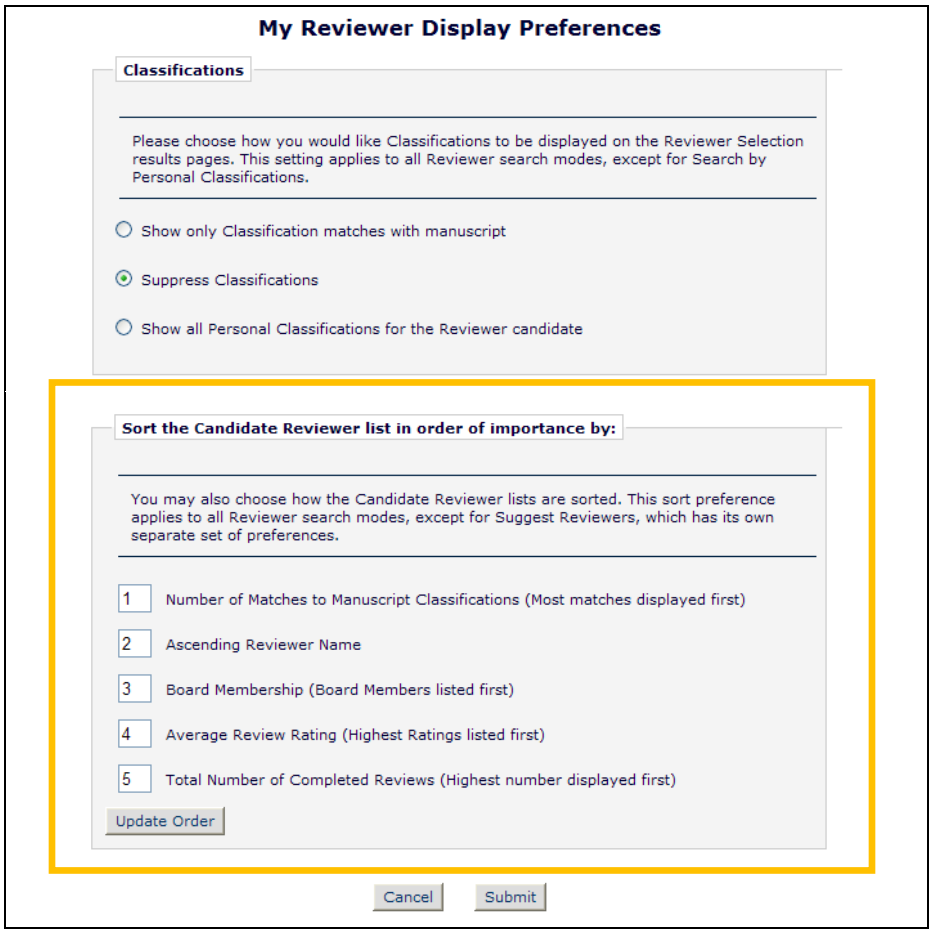

The *My Suggest Reviewer Preferences* page still allows Editors to rank the order of Reviewer Candidates resulting from the 'Suggest Reviewers' mode, however, the ranking functionality is enhanced with number entry boxes, and with two additional sort criteria. Suggested Reviewers may now be sorted by the following:

- Board Membership
- Number of Matches to Manuscript Classification
- Number of Pending Reviews
- Average Number of Days Reviews are Outstanding
- Date Last Review Completed
- Average Review Rating (Highest Ratings listed first)
- Total Number of Completed Reviews (Highest number displayed first)

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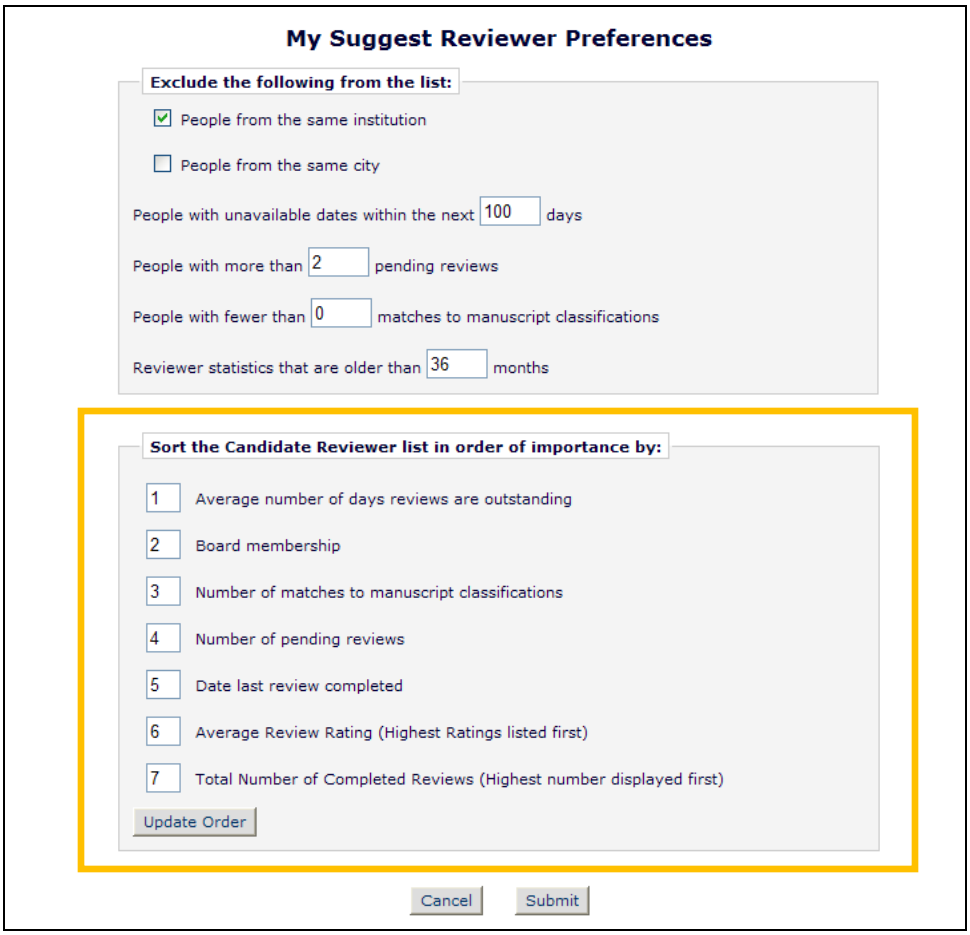

TO CONFIGURE:
No configuration required. Editors with permission to Invite Reviewers or Propose Reviewers will have these new options available when they click either the My Reviewer Display Preferences link or the My Suggest Reviewer Preferences link respectively.

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New Events in ActionManager

In EM v9.0, Due Dates for Reviewers and Authors may be changed by Editors on the *Details* page of a submission. New in EM v9.1, Letter Events are added to ActionManager to enable the automatic sending of letters when these due dates are changed.

The following three Letter events are added:

- "Revision Due Date Changed" – When an Author's Revision Due Date is changed and saved on the *Details* page for a submission, the following recipients may receive letters (if configured):
  - Author roles: The Corresponding Author of the submission
  - Editor roles: The special relationship Editor (Editor that made the first assignment) and current Handling Editor will receive letters.
    NOTE: Since the paper is awaiting Revision, there are technically no editors currently assigned to the submission. However, the last Handling Editor from the previous revision is retained until the Revision is received and assigned to others.

- "Invited Submission Due Date Changed" – When an Author's Invited Submission Due Date is changed and saved on *Details* page for a parent submission, the following recipients may receive letters (if configured):
  - Author roles: The Invited Author whose invited submission due dates is changed
  - Editor roles: The special relationship Editor of the parent submission, the current Handling Editor of the parent submission, and the Editor that invited the Author whose due date is being changed

- "Review Due Date Changed" – When a Reviewer's Review Due Date is changed and saved on *Details* for a submission, the following recipients may receive letters (if configured):
  - Editor roles: The special relationship Editor and current Handling Editor of the submission
  - Reviewer roles: The Reviewer whose review due date has been changed

TO CONFIGURE:
Letters for the new events may be selected from any letter family except the 'Ad Hoc' letter families. To create new letters for these events, go to PolicyManager, Edit Letters, and add a new letter.

To associate these letters with the new events, go to ActionManager, select the appropriate Role to receive letters, and select letters for the following events:

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Author Role:

- Revision Due Date Changed
- Invited Submission Due Date Changed

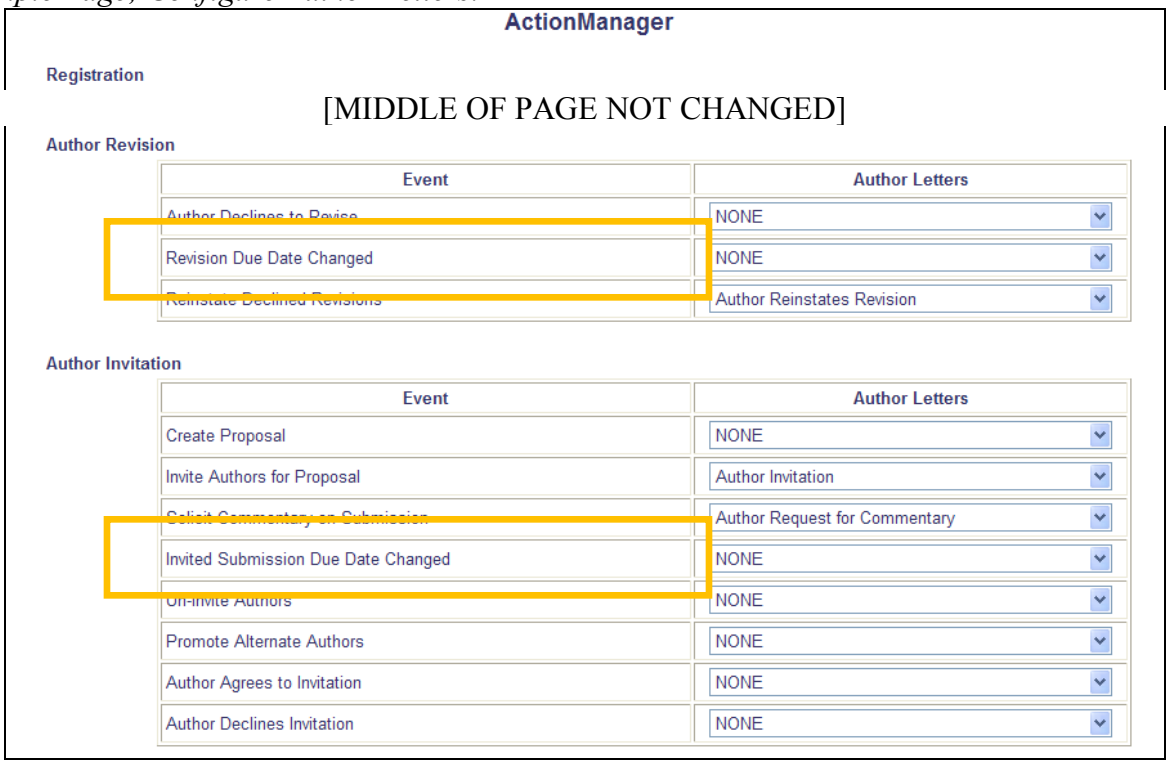
Reviewer Roles:

- Review Due Date Changed

Editor Roles:

- Revision Due Date Changed
- Invited Submission Due Date Changed
- Review Due Date Changed

Sample Page; Configure Author Letters:



Sample Page; Configure Reviewer Letters:

Ability to send Electronic Calendar Reminders

Many users of Editorial Manager also use electronic calendars to keep track of assignments and engagements. New in EM v9.1, certain due date letters can now include an electronic calendar entry that can be saved into any calendar that supports the iCalendar file format standard (e.g. Outlook, iCal, Google Calendar).

Letters can be triggered at the following points related to due dates:

For Authors:

- Author Agrees to Submit Invited Paper – the iCal file is attached to the letter configured for the "Author Agrees to Invitation" Event in ActionManager
- Invited Paper Due Date Changed – the iCal file is attached to the letter configured for the "Invited Submission Due Date Changed" Event in ActionManager. This iCal file removes the old reminder and replaces it with the new reminder on the user's calendar
- Author is Notified of a Revise Decision – the iCal file is attached to the letter configured for the "Author Notification of Revise Decision" decision where there is a Revision Due Date configured.
- Revision Due Date is Changed - the iCal file is attached to the letter configured for the "Revision Due Date Changed" Event in ActionManager. This iCal file removes the old reminder and replaces it with the new reminder on the user's calendar
- Author Declines to Revise – the iCal file is attached to the letter configured for the "Author Declines to Revise" Event in ActionManager. NOTE: This iCal file removes the reminder from the user's calendar
- Declined Revision is Reinstated – the iCal file is attached to the letter configured for the "Reinstate Declined Revisions" event in ActionManager where there is a Revision Due Date configured.

For Reviewers:

- Reviewer Agrees to Review – the iCal file is attached to the letter configured for the "Reviewer Agree" event in ActionManager
- Review Due Date Changed – the iCal file is attached to the letter configured for the "Review Due Date changed" event in ActionManager. This iCal file removes the old reminder and replaces it with the new reminder on the user's calendar
- Reviewer Uninvited/Unassigned – the iCal file is attached to the letter configured for either the "Un-invite Reviewers Before Agreeing to Review" event or the "Un-assign Reviewers After Agreeing to Review" event in ActionManager. NOTE: This iCal file removes the reminder from the user's calendar

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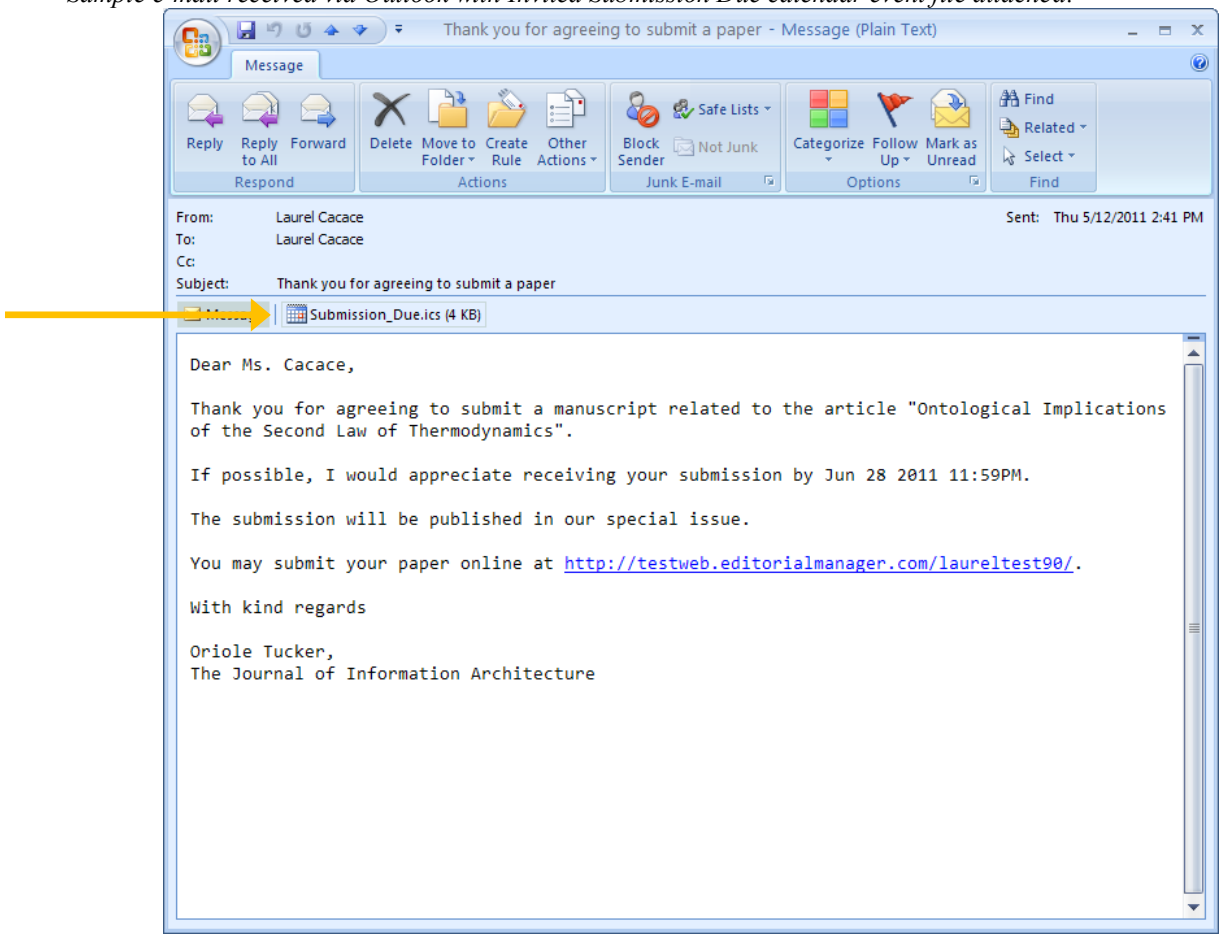
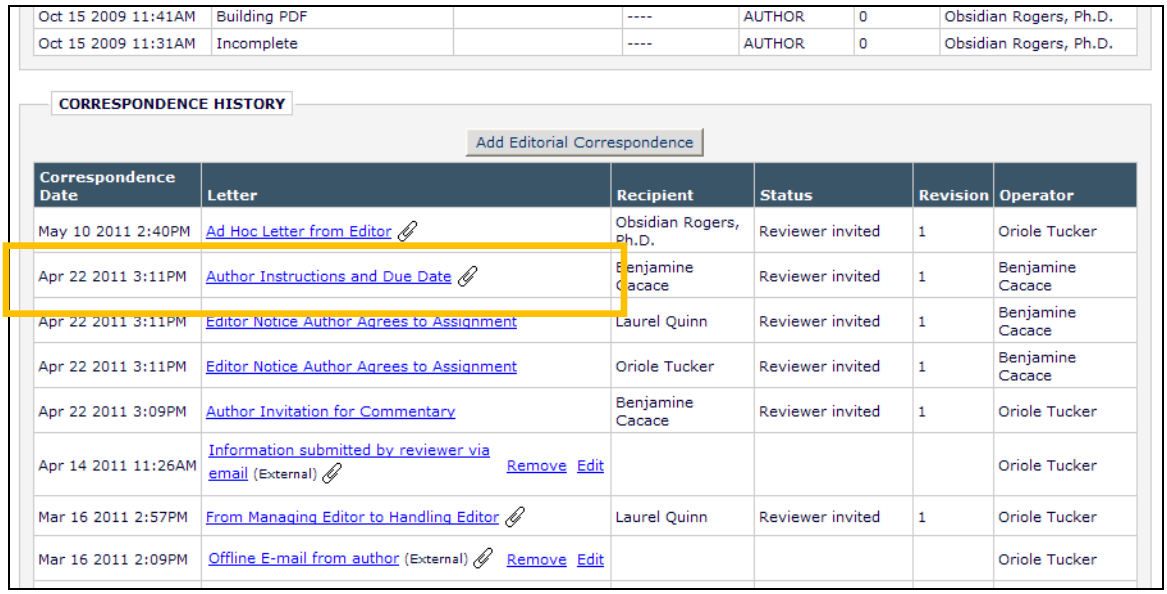
- Review Assignment Terminated – the iCal file is attached to the letter sent in the case where an Editor chooses to Terminate a Reviewer Assignment and send a letter. NOTE: This iCal file removes the reminder from the user's calendar

When the user receives the letter with the calendar event attachment, the event can be added to his or her electronic calendar by simply opening the file.

Sample e-mail received via Outlook with Invited Submission Due calendar event file attached:



When a letter has been sent from EM with an iCal attachment, a paperclip icon will display next to the letter in Correspondence History.



Oct 15 2009 11:41AM	Building PDF		----	AUTHOR	0	Obsidian Rogers, Ph.D.
Oct 15 2009 11:31AM	Incomplete		----	AUTHOR	0	Obsidian Rogers, Ph.D.

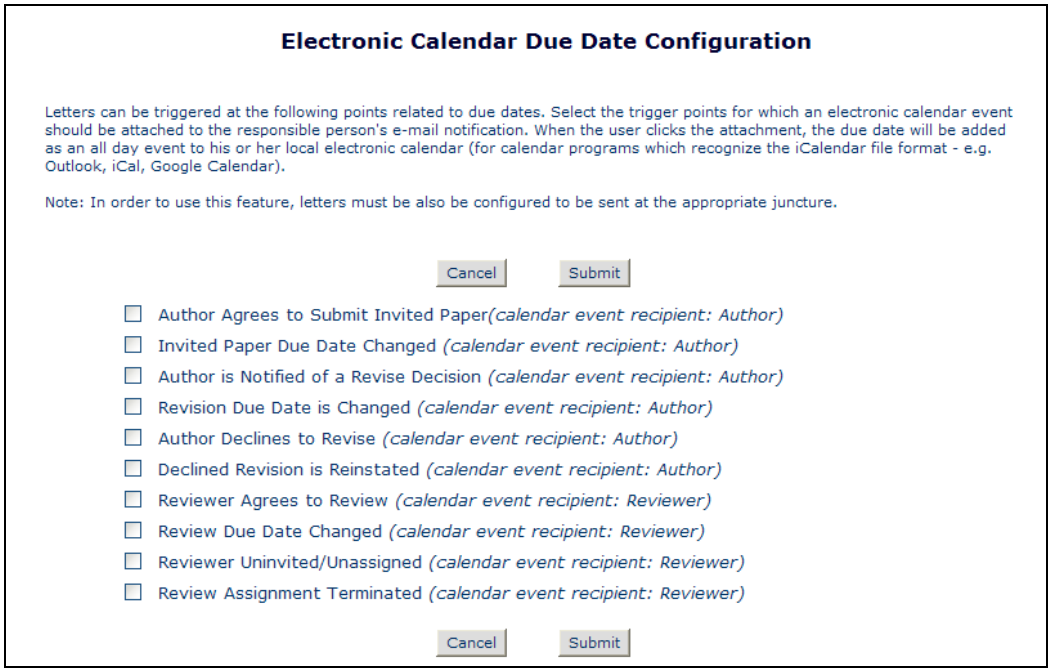
CORRESPONDENCE HISTORY

Add Editorial Correspondence

Correspondence Date	Letter	Recipient	Status	Revision	Operator
May 10 2011 2:40PM	Ad Hoc Letter from Editor	Obsidian Rogers, Ph.D.	Reviewer invited	1	Oriole Tucker
Apr 22 2011 3:11PM	Author Instructions and Due Date	Benjamine Cacace	Reviewer invited	1	Benjamine Cacace
Apr 22 2011 3:11PM	Editor Notice Author Agrees to Assignment	Laurel Quinn	Reviewer invited	1	Benjamine Cacace
Apr 22 2011 3:11PM	Editor Notice Author Agrees to Assignment	Oriole Tucker	Reviewer invited	1	Benjamine Cacace
Apr 22 2011 3:09PM	Author Invitation for Commentary	Benjamine Cacace	Reviewer invited	1	Oriole Tucker
Apr 14 2011 11:26AM	Information submitted by reviewer via email (External) Remove Edit				Oriole Tucker
Mar 16 2011 2:57PM	From Managing Editor to Handling Editor	Laurel Quinn	Reviewer invited	1	Oriole Tucker
Mar 16 2011 2:09PM	Offline E-mail from author (External) Remove Edit				Oriole Tucker

TO CONFIGURE:

To enable Calendar Entries to be sent with assignment letters, go to PolicyManager and click the Configure Electronic Calendar Due Date Preferences link. On the new *Electronic Calendar Due Date Configuration* page, select/check the trigger points for which an electronic calendar event should be attached to the responsible person's e-mail notification.



Electronic Calendar Due Date Configuration

Letters can be triggered at the following points related to due dates. Select the trigger points for which an electronic calendar event should be attached to the responsible person's e-mail notification. When the user clicks the attachment, the due date will be added as an all day event to his or her local electronic calendar (for calendar programs which recognize the iCalendar file format - e.g. Outlook, iCal, Google Calendar).

Note: In order to use this feature, letters must be also be configured to be sent at the appropriate juncture.

Cancel Submit

- ☐ Author Agrees to Submit Invited Paper *(calendar event recipient: Author)*
- ☐ Invited Paper Due Date Changed *(calendar event recipient: Author)*
- ☐ Author is Notified of a Revise Decision *(calendar event recipient: Author)*
- ☐ Revision Due Date is Changed *(calendar event recipient: Author)*
- ☐ Author Declines to Revise *(calendar event recipient: Author)*
- ☐ Declined Revision is Reinstated *(calendar event recipient: Author)*
- ☐ Reviewer Agrees to Review *(calendar event recipient: Reviewer)*
- ☐ Review Due Date Changed *(calendar event recipient: Reviewer)*
- ☐ Reviewer Uninvited/Unassigned *(calendar event recipient: Reviewer)*
- ☐ Review Assignment Terminated *(calendar event recipient: Reviewer)*

Cancel Submit

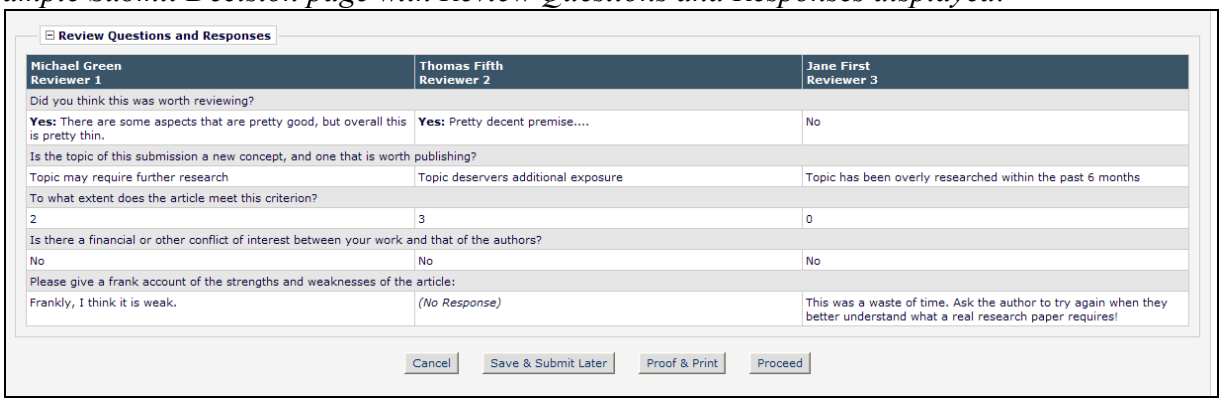
Review Questions and Answers Available for Inclusion on Decision Letter

In EM v9.0, publications can configure Custom Review Questions ("Review Form") and associate these with Article Types and Reviewer Roles. The Reviewers' responses are available for the Editor to review by clicking the View Reviews and Comments Action Link and viewing the individual recommendations, or by clicking the View Review Question Responses link.

New in EM v9.1, the Review Questions and Responses associated with a specific submission may now be displayed directly on the *Submit Editor's Decision and Comments* page. Additionally, each question may be configured to allow the Question and Response(s) to be merged into the decision letter sent to the Author using a new %REVIEW_QUESTIONS_AND_RESPONSES% merge field.

When an Editor Form is configured to display Review Questions and Responses, Editors will see a grid containing all Custom Review Questions and the associated Responses for each Reviewer.

Sample Submit Decision page with Review Questions and Responses displayed:



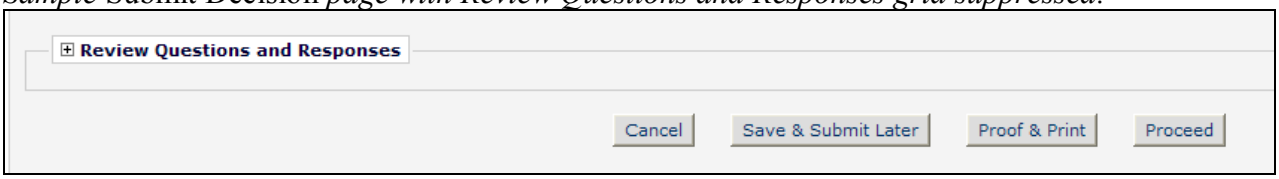
⊟ Review Questions and Responses

Michael Green Reviewer 1	Thomas Fifth Reviewer 2	Jane First Reviewer 3
Did you think this was worth reviewing?		
Yes: There are some aspects that are pretty good, but overall this is pretty thin.	**Yes:** Pretty decent premise....	No
Is the topic of this submission a new concept, and one that is worth publishing?		
Topic may require further research	Topic deservers additional exposure	Topic has been overly researched within the past 6 months
To what extent does the article meet this criterion?		
2	3	0
Is there a financial or other conflict of interest between your work and that of the authors?		
No	No	No
Please give a frank account of the strengths and weaknesses of the article:		
Frankly, I think it is weak.	*(No Response)*	This was a waste of time. Ask the author to try again when they better understand what a real research paper requires!

Cancel | Save & Submit Later | Proof & Print | Proceed

An Editor may collapse the Review Questions and Responses grid on the *Submit Decision* page by clicking the 'minus' ⊟ button next to the section header. The section collapses (is suppressed), with the 'minus' button replaced by a 'plus' ⊞ button.

Sample Submit Decision *page with Review Questions and Responses grid suppressed:*



NOTE: The Editor's most recent display (grid displayed or suppressed) is saved as a user preference and is the default display the next time s/he visits the *Submit Editor's Decision and Comments* page for any submission where the grid is configured to display.

When a particular Review Question is configured to be "Available for Decision Letter Merging", a 'merge' checkbox appears for each Reviewer's Response to that Question in the Review Questions and Responses grid on the *Submit Editor's Decision and Comments* page. These boxes are selected/checked by default when they display in the 'Review Questions and

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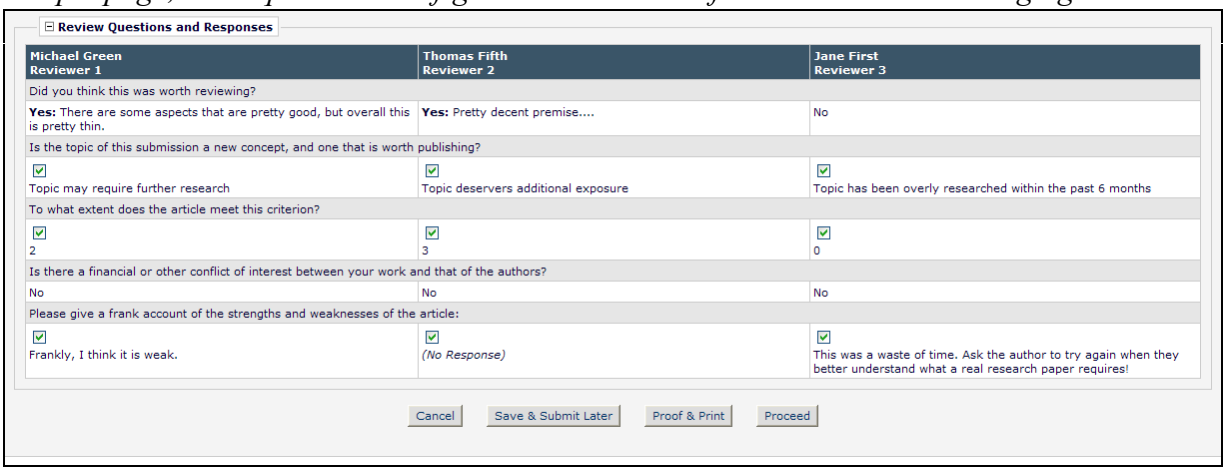
Responses' grid. This allows the Editor to determine whether the Review Question and each individual Response is merged into the decision letter using the new %REVIEW_QUESTIONS_AND_RESPONSES% merge field.

Sample page; three questions configured as 'Available for Decision Letter Merging':



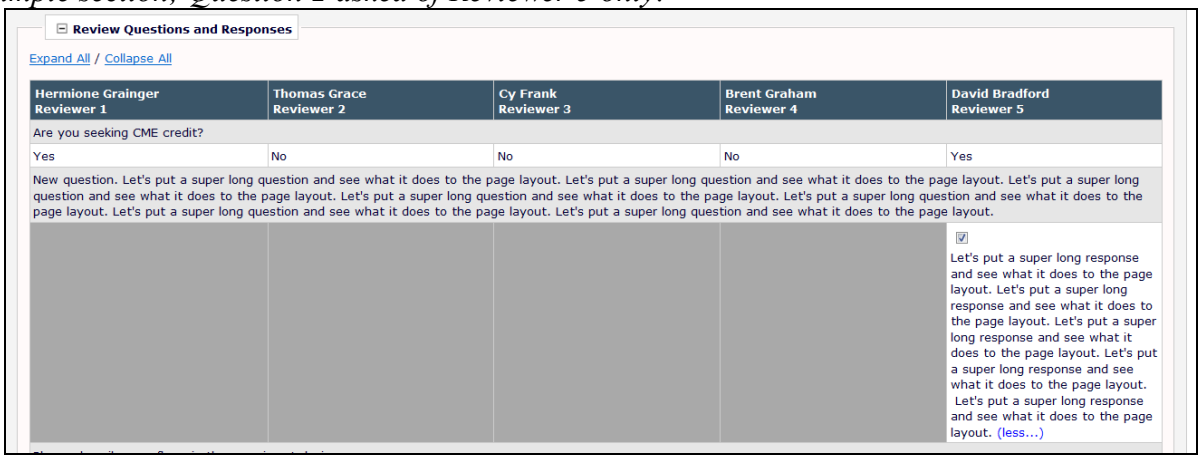
Review Questions and Responses

Michael Green Reviewer 1	Thomas Fifth Reviewer 2	Jane First Reviewer 3
Did you think this was worth reviewing?		
Yes: There are some aspects that are pretty good, but overall this is pretty thin.	**Yes:** Pretty decent premise....	No
Is the topic of this submission a new concept, and one that is worth publishing?		
☑ Topic may require further research	☑ Topic deservers additional exposure	☑ Topic has been overly researched within the past 6 months
To what extent does the article meet this criterion?		
☑ 2	☑ 3	☑ 0
Is there a financial or other conflict of interest between your work and that of the authors?		
No	No	No
Please give a frank account of the strengths and weaknesses of the article:		
☑ Frankly, I think it is weak.	☑ *(No Response)*	☑ This was a waste of time. Ask the author to try again when they better understand what a real research paper requires!

Cancel | Save & Submit Later | Proof & Print | Proceed

If a Question is not presented to a particular Reviewer, the 'response' area is shaded with dark gray.

Sample section; Question 2 asked of Reviewer 5 only:



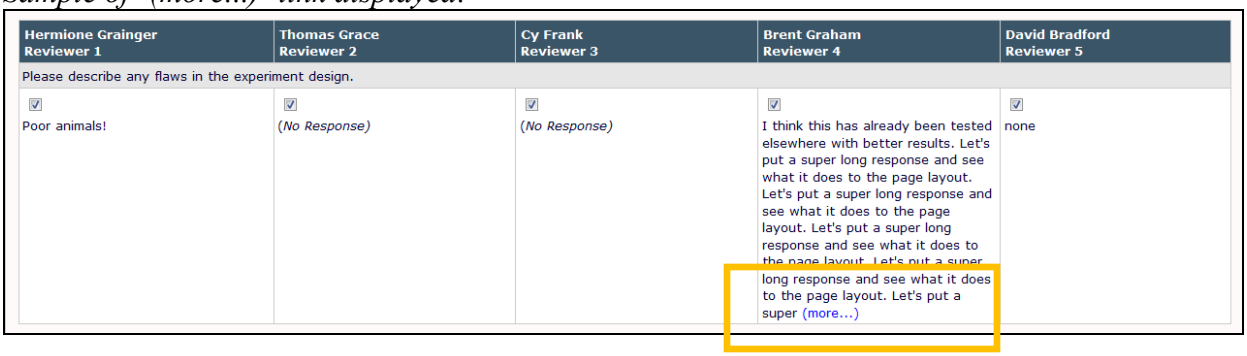
Review Questions and Responses

Expand All / Collapse All

Hermione Grainger Reviewer 1	Thomas Grace Reviewer 2	Cy Frank Reviewer 3	Brent Graham Reviewer 4	David Bradford Reviewer 5
Are you seeking CME credit?				
Yes	No	No	No	Yes
New question. Let's put a super long question and see what it does to the page layout. Let's put a super long question and see what it does to the page layout. Let's put a super long question and see what it does to the page layout. Let's put a super long question and see what it does to the page layout. Let's put a super long question and see what it does to the page layout. Let's put a super long question and see what it does to the page layout.				
				☑ Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. (less...)

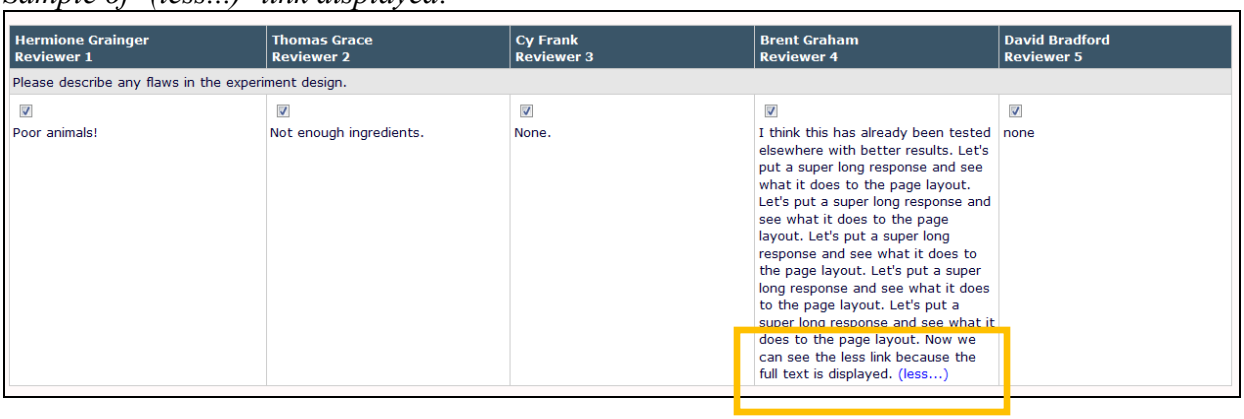
Expand All / Collapse All links are shown when the grid is displayed and at least one of the responses is longer than 500 characters. These links are used to expand/collapse the text within each Response cell(s) of the grid that exceed 500 characters. The individual cells that exceed 500 characters also display (more...) / (less...) links, allowing individual cells to be expanded/collapsed.

Sample of '(more...)' link displayed:



Hermione Grainger Reviewer 1	Thomas Grace Reviewer 2	Cy Frank Reviewer 3	Brent Graham Reviewer 4	David Bradford Reviewer 5
Please describe any flaws in the experiment design.				
Poor animals!	*(No Response)*	*(No Response)*	I think this has already been tested elsewhere with better results. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super (more...)	none

Sample of '(less...)' link displayed:



Hermione Grainger Reviewer 1	Thomas Grace Reviewer 2	Cy Frank Reviewer 3	Brent Graham Reviewer 4	David Bradford Reviewer 5
Please describe any flaws in the experiment design.				
Poor animals!	Not enough ingredients.	None.	I think this has already been tested elsewhere with better results. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Let's put a super long response and see what it does to the page layout. Now we can see the less link because the full text is displayed. (less...)	none

NOTE: The full text of the Question is always displayed; only lengthy Responses are shown with (more...) / (less...) links.

The new merge field %REVIEW_QUESTIONS_AND_RESPONSES% will merge in the Questions and selected Responses into the draft Notify Author letter. Editors may edit the information directly in the letter if they so choose.

NOTE: If all of the Responses are de-selected by the Editor, neither the Question nor any of the Responses are pulled into the letter.

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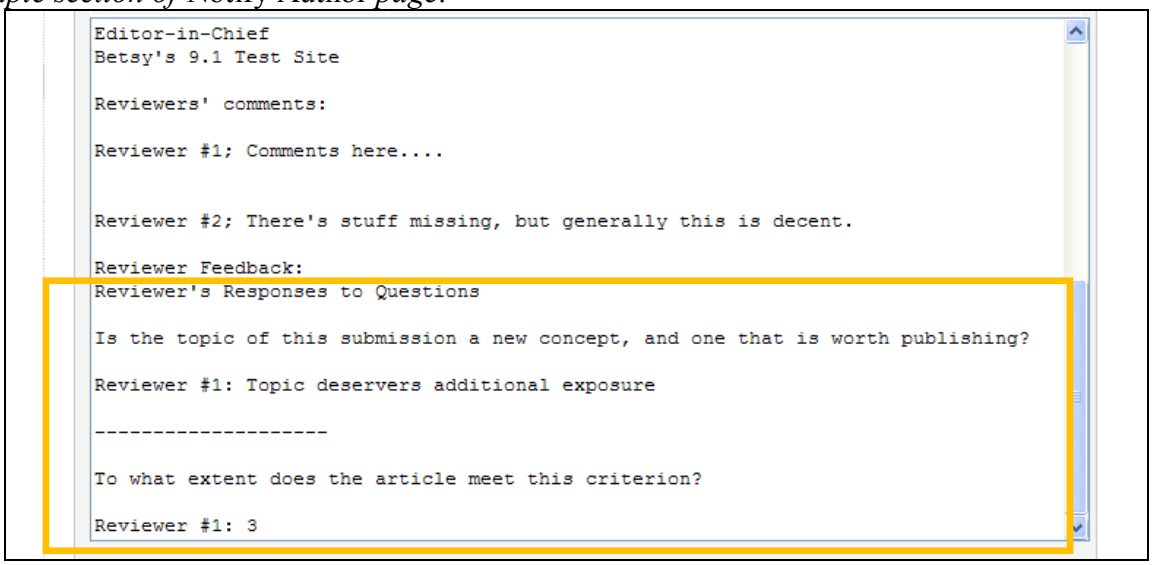
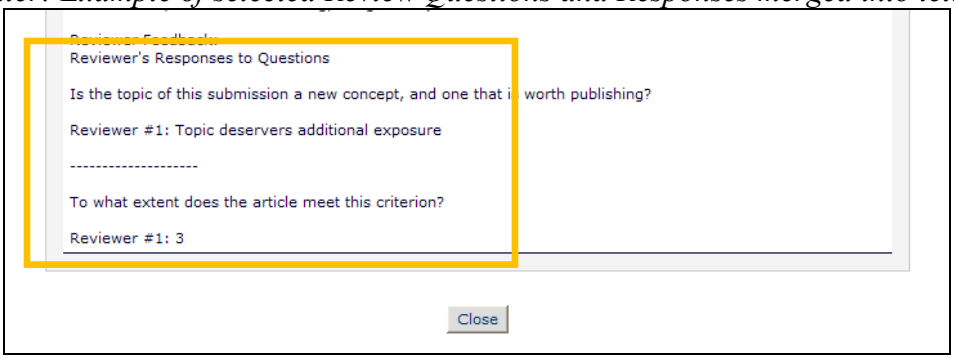
Sample section of Notify Author *page:*



The information merged into the letter displays with the following features:

- The section has a header reading 'Reviewer's Responses to Questions'
- A horizontal line <hr> is inserted after each Question in HTML formatted letters.
- For plain text letters, 20 dashes are inserted in the line after the Question.

Preview Letter: Example of selected Review Questions and Responses merged into letter:



TO CONFIGURE:
To display Review Questions and Responses on the Editor Form, go to PolicyManager, Create Editor Forms, and edit an existing form or add a new form. On the *Add/Edit Editor Form* page, at the bottom of the page, select/check the new 'Display Custom Review Questions and Responses Grid' button to display configured Review Questions and Answers on the Editor Form. Below this, select the order in which the sections of the form should display; the Custom Review Questions and Answers display 3rd by default.

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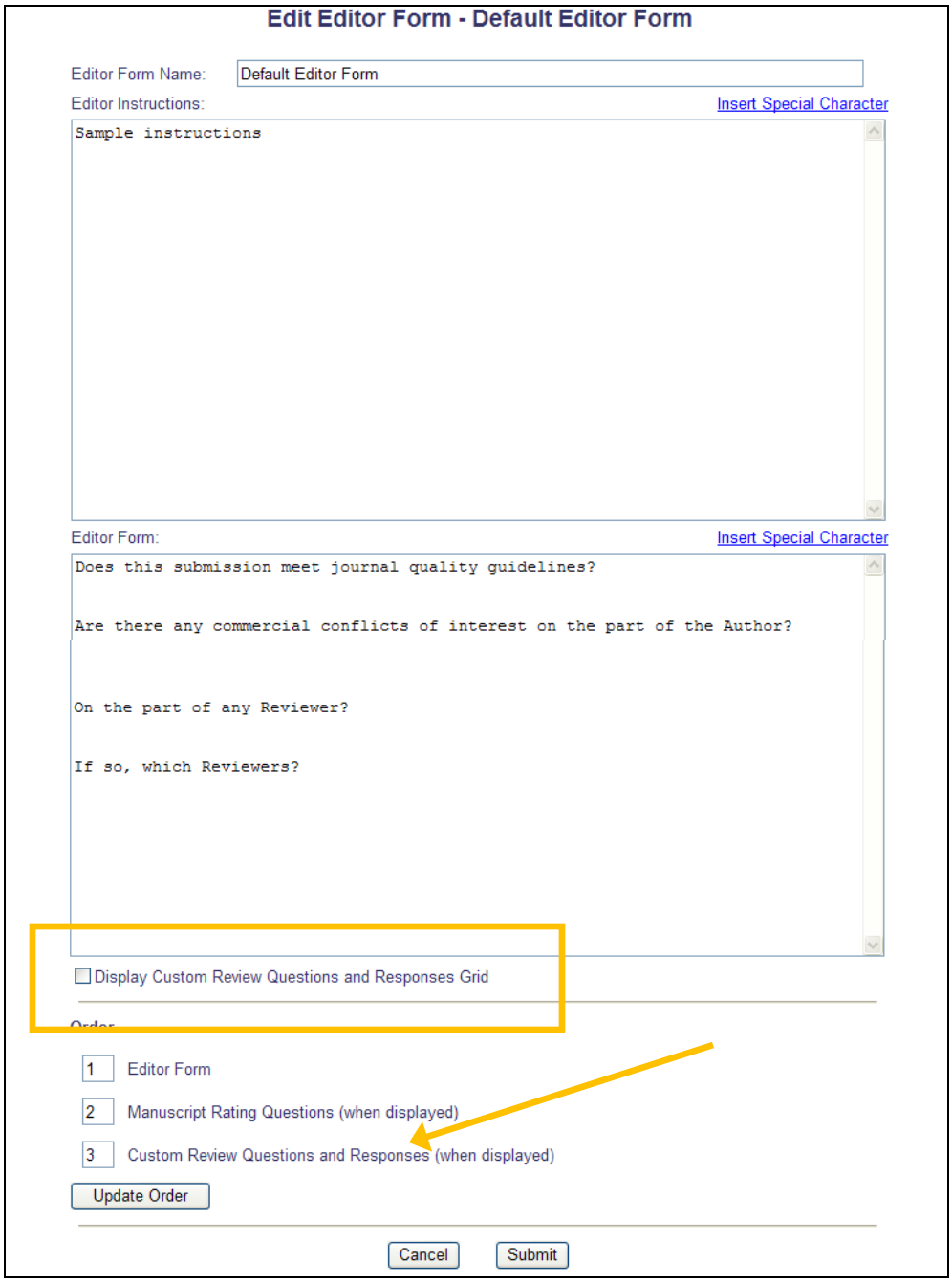

To select which Review Questions will be included in the Display (when the above option is selected/checked), go to PolicyManager, Create/Edit Custom Review Questions, and Edit an existing question or add a new question.

A new checkbox is added under the 'Hide' option on this page called 'Available for Decision Letter Merging'. When this option is selected/checked for a question, both the question and answer(s) can be merged into the decision letter using the new %REVIEW_QUESTIONS_AND_RESPONSES% merge field. Editors will be able to de-select

individual responses from any Reviewer (on the *Submit Editor's Decision and Comments* page) before the Author is notified.

To have these fields included in Decision Letters, go to PolicyManager, Edit Letters, and edit any existing letters in the Decision letter family. Add the new %REVIEW_QUESTIONS_AND_RESPONSES% merge field to any letters that should include the Review Questions and Responses.

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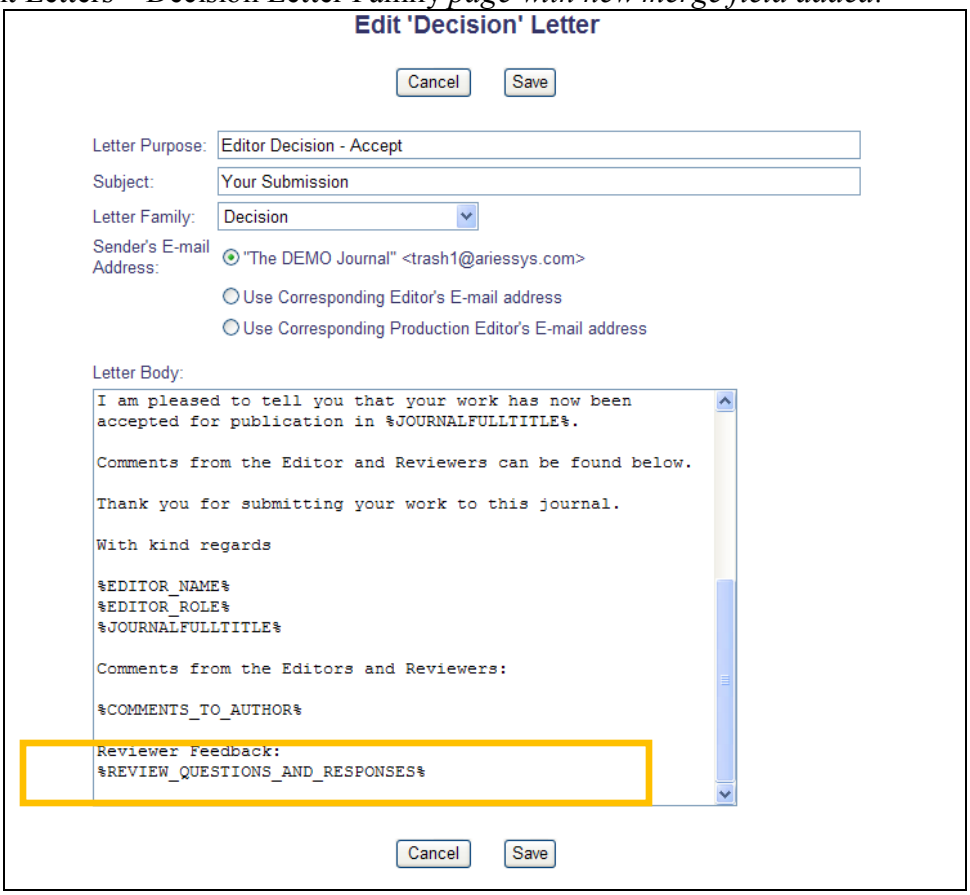
Sample Edit Letters – Decision Letter Family *page with new merge field added:*



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Pass Decision Letter up Editor Chain

In EM v9.0, an Editor's notification permission can be limited so that an Editor can draft, but not send, the Decision Letter that is ultimately sent to the Author. The responsibility for sending the letter is then passed to the next Editor in the submission's Editor Chain. This process allows one Editor to draft the Decision Letter for another to ratify, but does not permit the draft to be handed off more than once.

New in EM v9.1, this functionality is enhanced so that the letter may be edited and handed from one Editor to another all the way up the chain. When a lower-level Editor has submitted a decision with a saved draft of the Decision letter, the next in-chain Editor is immediately taken to the Author Notification letter saved by the previous Editor upon clicking the Submit Editor's Decision and Comments action link.

If this Editor has permission to Notify the Author after the selected decision, then s/he is allowed to either:

- Accept this decision as their own decision without submitting their own comments and send the Decision letter to the Author (existing functionality)
- Override the previous Editor's decision, submit their own comments, record a different decision, draft a new letter and send it to the Author (existing functionality)
- Return the submission to the original Editor for a new decision (effectively rescinding the decision) by returning the submission without the draft letter (existing functionality)
- Return the draft letter to the original Editor for revision by returning the submission with the draft letter (existing functionality)
  OR
- Submit his/her decision to the next Editor in the chain (with or without a draft letter) for review before the Author is notified by using the 'Submit Decision without Notifying Author' button (new functionality)

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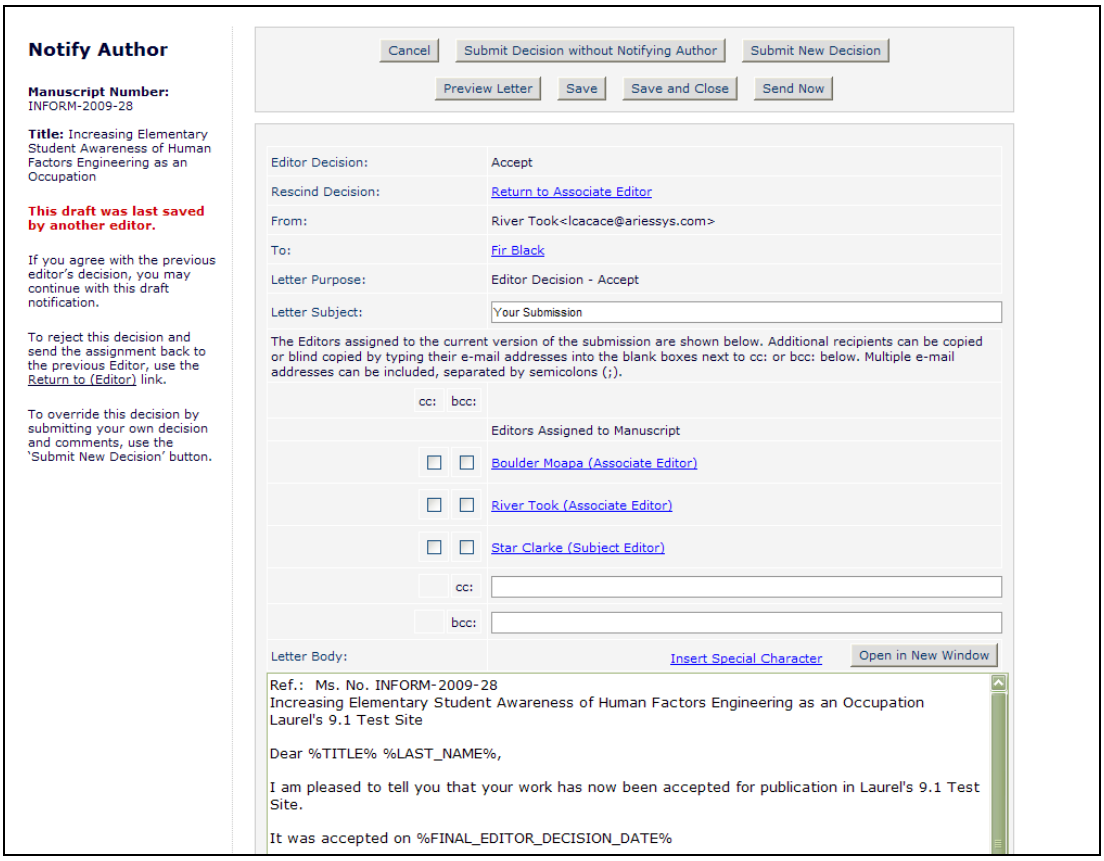

If this Editor only has permission to draft a notification letter for the selected decision, then s/he is allowed to either:

- Submit their own comments and record a different decision using the 'Submit New Decision' button (existing functionality)
- Return the submission to the original Editor for a new decision (effectively rescinding the decision) by returning the submission without the draft letter (existing functionality)
- Return the draft letter to the original Editor for revision by returning the submission with the draft letter (existing functionality)
  OR
- Submit the Lower Level Editor's Decision as their own with the Draft Letter to a higher level Editor for that Editor to send the notification (new functionality)

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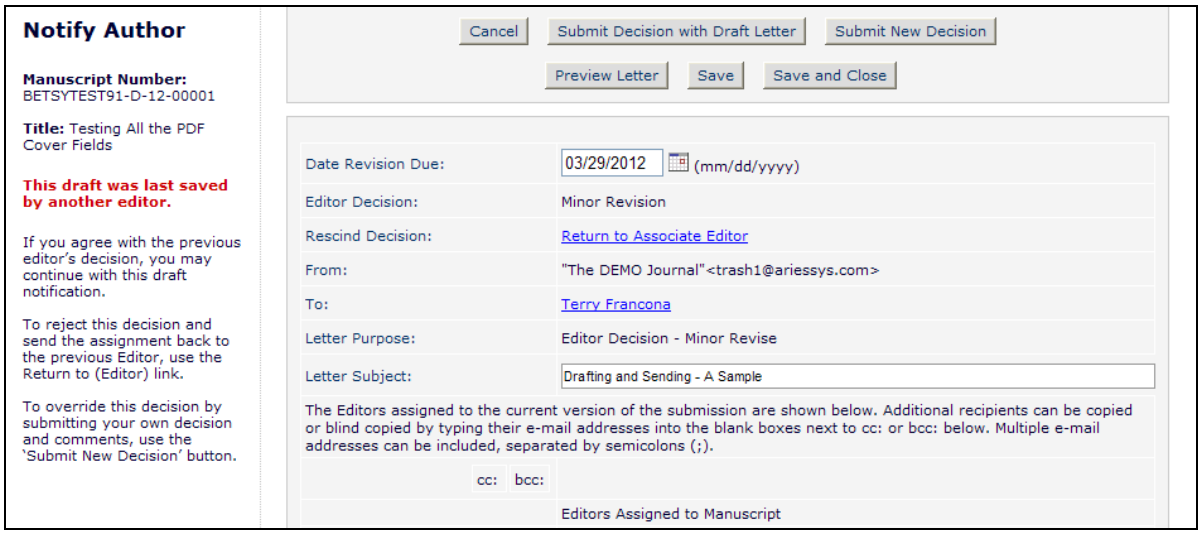

TO CONFIGURE:

No additional configuration is required for this new feature. Editors with the existing "Only draft the Notification (another Editor must ratify and send)" permission enabled will now be able to submit draft versions of Notification letters regardless of whether the letter is original or was a draft inherited from another Editor.

New Merge Fields

Two new merge fields are available for use in EM v9.1.

Publications may configure Custom Submission Questions that are then formed into a Questionnaire that is associated with an Article Type. Authors see these questions on the 'Additional Information' step of the Submit Manuscript process.

Publications may also configure Custom Review Forms, asking specific questions of Reviewers. These questions may be configured for inclusion in the Author Notification Letter.

New in EM v9.1, a new merge field is created for use in all letters called %AUTHOR_QUESTIONNAIRE%. The %AUTHOR_QUESTIONNAIRE% merge field pulls in all questions and answers presented to the Author at time of submission (i.e. even if the Author did not respond to a particular question, the question – and blank response - is still pulled into the merge field). These questions are displayed with the text 'Question:' inserted before the question, and the text 'Response:' inserted prior to the response (or the blank space if the question was not answered).

Also new in EM v9.1, the Review Questions and Responses associated with a specific submission may be configured to allow the Question and Response(s) to be merged into the decision letter sent to the Author using a new %REVIEW_QUESTIONS_AND_RESPONSES% merge field. This merge field will merge in the Questions and selected Responses into the draft Notify Author letter. Editors may edit the information directly in the letter if they so choose (see the 'Review Questions and Answers Available for Inclusion on Decision Letter' section of these release notes for more information on this merge field).

TO CONFIGURE:
Go to PolicyManager, Edit Letters, and select the letter(s) in which you wish to use these merge fields. Edit the letters to include the new merge fields.

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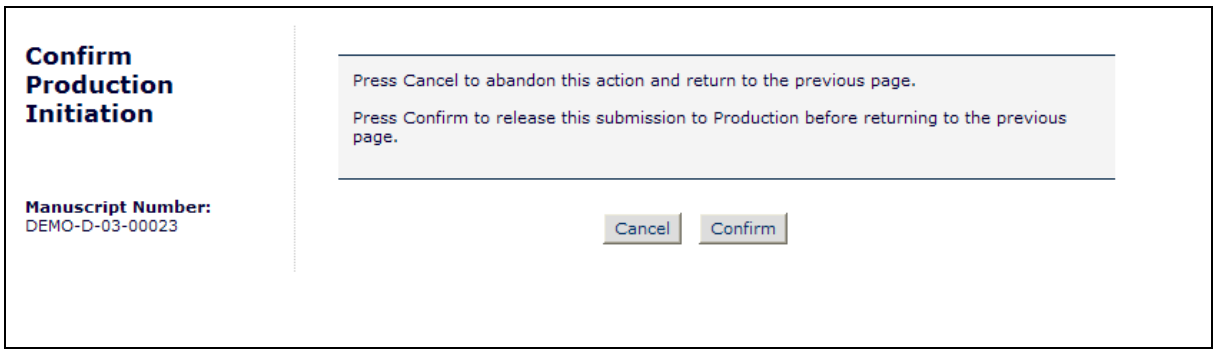
PRODUCTION TRACKING ENHANCEMENTS

Enhanced Initiate Production Process

Some EM/PM publications have a separation between those responsible for the Editorial side and those responsible for the Production Tracking side. New in EM/PM v9.1, publications may configure user roles so that a member of the Editorial staff can initiate production on a submission without being asked if they want to assign the submission to a Schedule Group or Assign a Production Task. In this case, the submission is placed directly into the *Production Initiated – No Tasks Assigned* folder located on the Production Tasks menu.

When an Editor has 'Initiate Production Manually' permission enabled (this is the existing 'Initiate Production' permission, renamed), but they do not have the new 'Allow Task Assignment and Assignment to Schedule Group when Initiating Production' permission enabled, then when the Editor clicks the 'Initiate Production' Action Link from any folder, they will now be brought to a confirmation page, where they can confirm the initiation of production on the submission.



When the Editor clicks the 'Confirm' button, they are returned to the folder from which they clicked the Action Link, and the submission is placed in the *Production Initiated – No Tasks Assigned* folder on the Production Tasks menu for another user with permission to assign a Production Task.

TO CONFIGURE:
A new RoleManager permission is added for the Editor role called "Allow Task Assignment and Assignment to Schedule Group when Initiating Production". On upgrade, Editor Roles with the existing 'Initiate Production' permission enabled (relabeled 'Initiate Production Manually' in v9.1) will have this new permission enabled as well. Editor roles that do not have 'Initiate Production Manually' enabled will not have the new permission enabled.

NOTE: This is not a sub-permission of the 'Initiate Production Manually' permission, as this setting also applies if the new 'Automatically Initiate Production' functionality is invoked when an Editor sets a Final Disposition of 'Accept' (see the 'Automated Initiate Production Process' section of these release notes).

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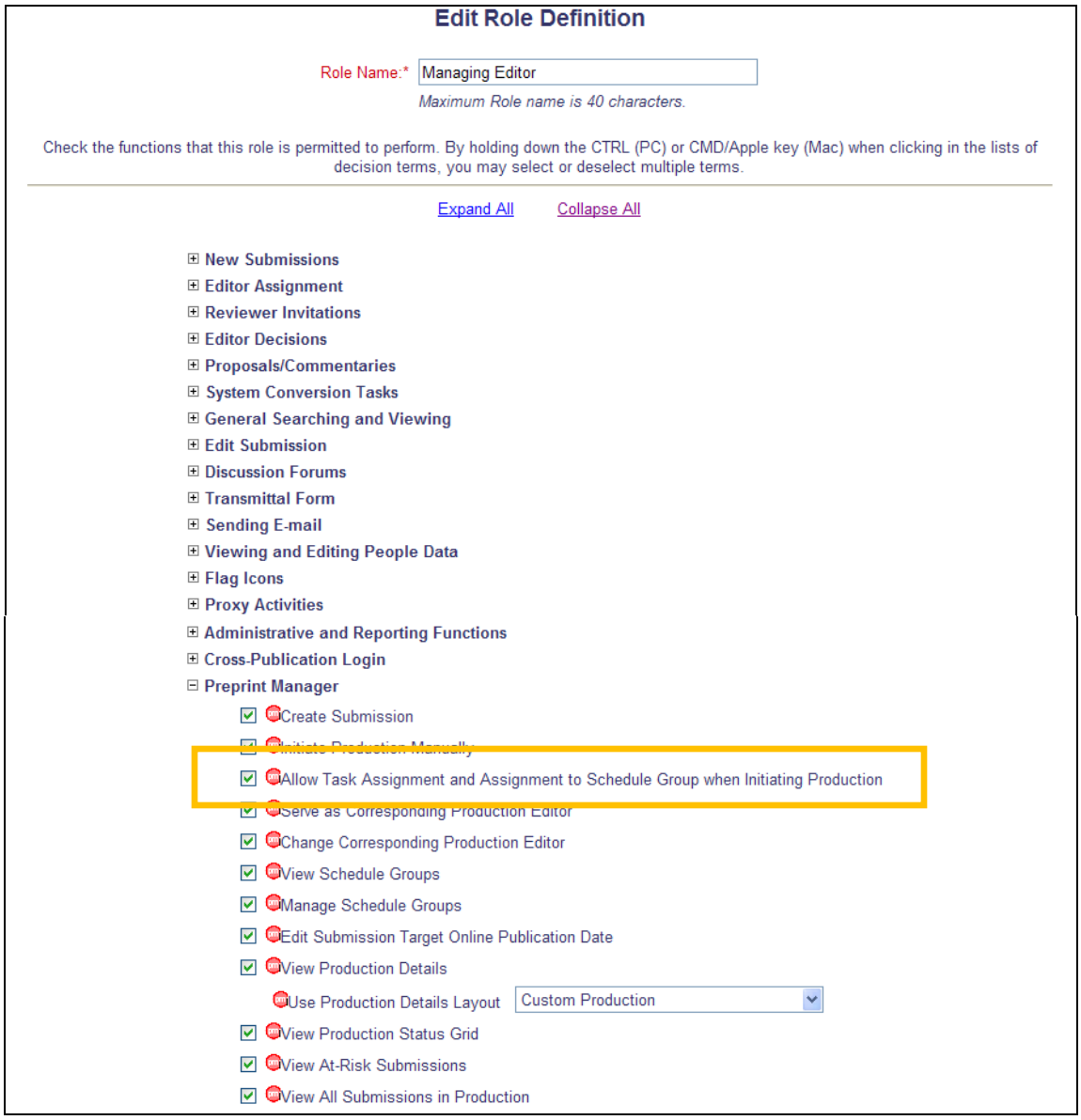
Edit Role Definition
Role Name:*
Managing Editor
Maximum Role name is 40 characters.
Check the functions that this role is permitted to perform. By holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking in the lists of decision terms, you may select or deselect multiple terms.
Expand All
Collapse All
New Submissions
Editor Assignment
Reviewer Invitations
Editor Decisions
Proposals/Commentaries
System Conversion Tasks
General Searching and Viewing
Edit Submission
Discussion Forums
Transmittal Form
Sending E-mail
Viewing and Editing People Data
Flag Icons
Proxy Activities
Administrative and Reporting Functions
Cross-Publication Login
Preprint Manager
Create Submission
Initiate Production Manually
Allow Task Assignment and Assignment to Schedule Group when Initiating Production
Serve as Corresponding Production Editor
Change Corresponding Production Editor
View Schedule Groups
Manage Schedule Groups
Edit Submission Target Online Publication Date
View Production Details
Use Production Details Layout
Custom Production
View Production Status Grid
View At-Risk Submissions
View All Submissions in Production

Automated Initiate Production Process

In EM/PM v9.0, customers who transfer submissions to an external production tracking system can do so by setting the Final Disposition to Accept. Customers who use PM Production Tracking have to manually initiate production on a submission from the Editorial Menu by clicking the Initiate Production link from folders, predominately from the *Final Disposition – Accept* folder.

For publications who routinely initiate production on any submission with a final disposition of 'Accept', the need to navigate to the *Final Disposition – Accept* folder after setting the Final Disposition is an additional step.

New in EM/PM v9.1, publications may configure their site to automatically initiate production when the final disposition is set to an Accept term based on the following three choices, eliminating the need for users to scan the *All Submissions with Final Disposition: Accept* folder for submissions to put into production:

- Setting Final Disposition to 'Accept' – this applies to most standard EM submissions
- Setting Final Disposition to 'Accept on Submission' – this new Final Disposition applies to most standard EM submissions, before an Editor is assigned (see the 'New Final Disposition Term' section of these release notes)
- Setting Final Disposition to 'Accept and Transmit' – this is for Conference Submissions only

When a site is configured to automatically initiate production on one of the above Final Dispositions, then when that Final Disposition is selected for a submission, the user proceeds through the Transmittal Form process as usual. When the Editor confirms the final stage of the process, the submission also has Production Initiated automatically. If the Editor has the 'Allow Task Assignment and Assignment to Schedule Group when Initiating Production' permission enabled, then after production is initiated they are brought to the first page of the 'Initiate Production' process, where they can proceed to assign the submission to a Schedule Group, assign a first submission task, or choose to not assign a task and place the submission into the Production Initiated – No Tasks Assigned folder.

If the Editor does not have this permission, then production is initiated behind the scenes, and they are returned to the referring page exactly per the current workflow. They will experience no change to current functionality when setting the Final Disposition to Accept. For production staff, the submission will appear in the *Production Initiated – No Tasks Assigned* folder.

NOTE: The Set Final Disposition action link no longer opens a pop-up window. All Final Disposition functionality now takes place within the main EM window.

NOTE: This setting does not prevent production from being initiated at an earlier stage; it means that submissions will automatically be sent to production if this has not happened before the Final Disposition is set.

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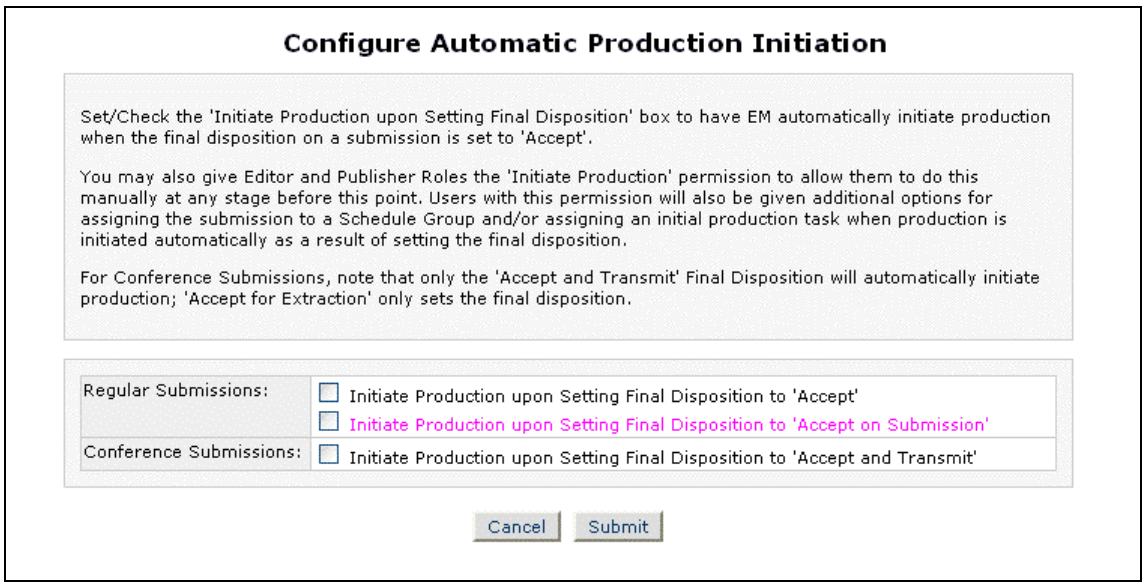
TO CONFIGURE:
To automate the initiate production process, go to PolicyManager, and click the Configure Automatic Production Initiation link. On the *Configure Automatic Production Initiation* page, administrators may configure a trigger point from the three choices.



NOTE: If you enable this feature, and only initiate production when the submission is accepted, you may not need to have anyone configured with the 'Initiate Production Manually' setting. That permission is required if production may be initiated before a final disposition is set on a submission.

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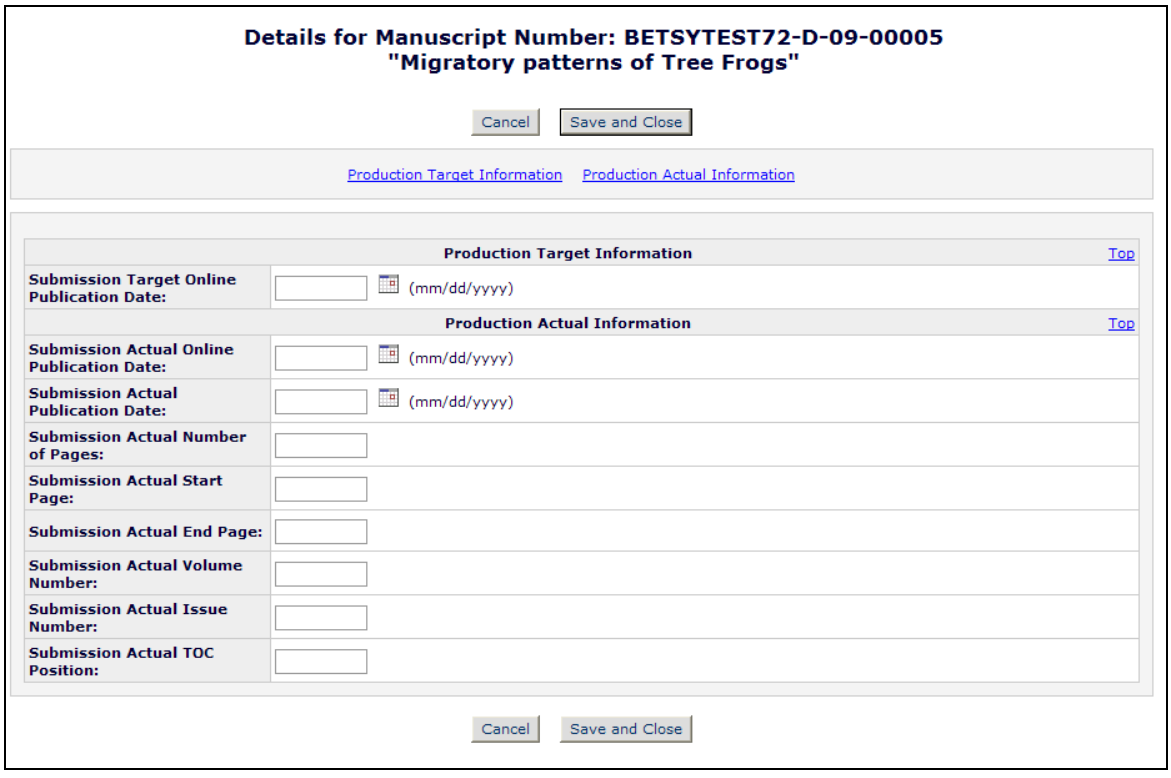
Publish Information fields on Custom Details

In EM/PM v9.0, Production Tracking users are able to access certain Production meta-data fields via a Publish Information link found on the *Details* page and in the Final Disposition folders. PM users have often requested that these metadata fields be made available as individual fields on the main *Details* page. New in EM/PM v9.1, the following Production Metadata fields may now be added to a custom *Details* layout where they can be edited, rather than having to go to an additional page:

- Submission Actual Online Publication Date
- Submission Actual Publication Date
- Submission Actual Number of Pages
- Submission Actual Start Page
- Submission Actual End Page
- Submission Actual Volume Number
- Submission Actual Issue Number
- Submission Actual TOC Position



TO CONFIGURE:
To add the Publish Information Metadata fields to a custom *Details* layout, go to PolicyManager, Define Details Page Layouts, and click 'Edit' next to an existing layout you wish to change, or copy an existing layout, or add a new layout. Click the Select Items to Display link, and select

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the new fields from the 'Publishing and Production Information' section. Submit the page to add the new fields to the list, and then you can re-order the display order for the Details layout.

NOTE: It is recommended that if you allow the Publish Information Metadata fields to be editable on the *Custom Details* page that you suppress the Publish Information link by unchecking/deselecting 'Publish Information' under the 'Links' section on the *Select Items to Display* page. This configuration may prevent accidentally overwriting data from one page onto the other page.

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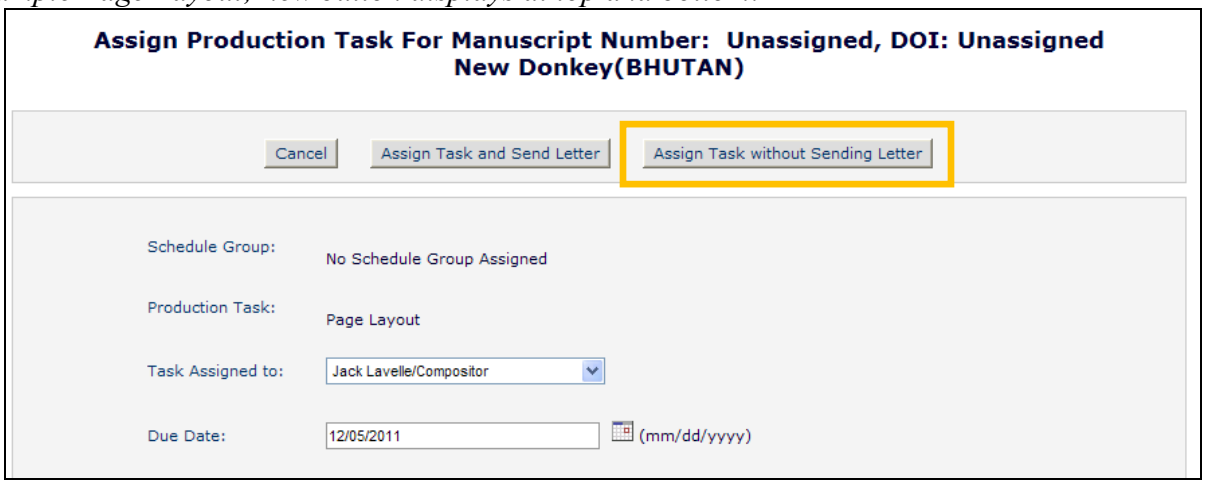
Assign Tasks without Sending Letter

Often times, users who work within EM/PM frequently find that an e-mail notification for each production task assignment is unnecessary. To accommodate this, PM v9.1 introduces the ability to assign Submission or Schedule Group Production Tasks without sending assignment letters.

When Editors assign Submission or Schedule Group Production Tasks, and the task is configured to allow the assignment of the task without sending a letter, then a new 'Assign Task without Sending Letter' button displays on the Assign Production Task page.

Sample Page Layout; new button displays at top and bottom:



Clicking the new 'Assign Task without Sending Letter' button completes the assignment of the task without sending a letter to the assignee.

TO CONFIGURE:
To configure a Submission Production Task to allow the assignment without sending a letter, go to PolicyManager, Configure Submission Production Tasks, and either Edit an existing Task or add a new task. On the *Edit Submission Production Task* page, scroll to the bottom of the page where Letters are selected. Select/Check the new 'Allow Task Assignment without Sending Letter' checkbox under the 'Assignment Letter' selector drop-down.

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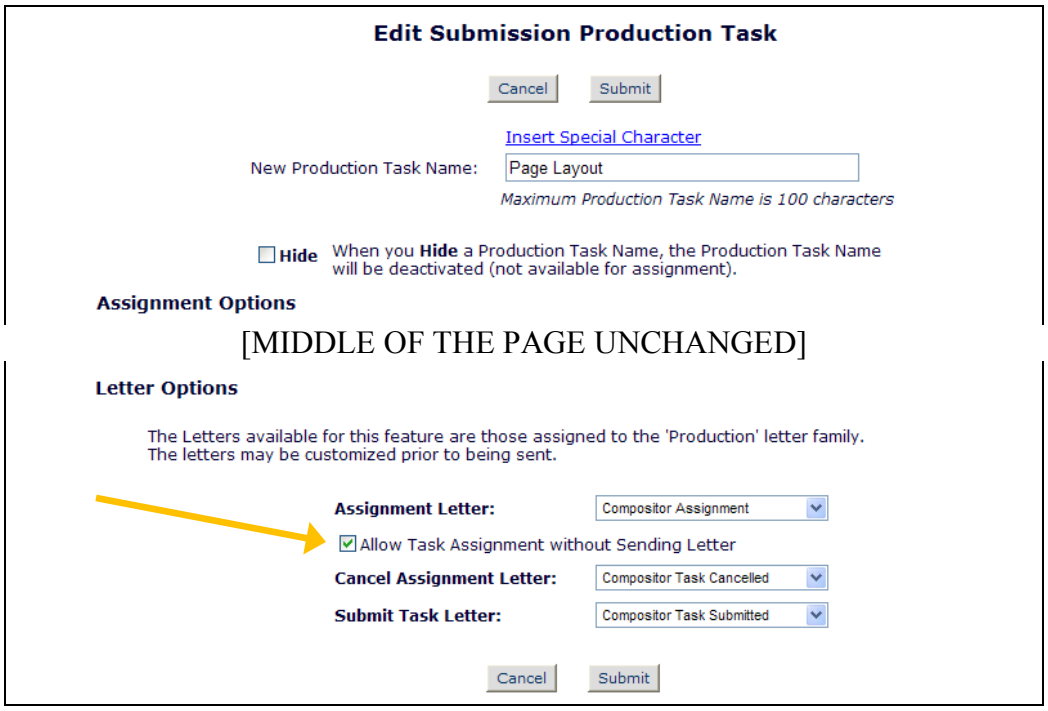
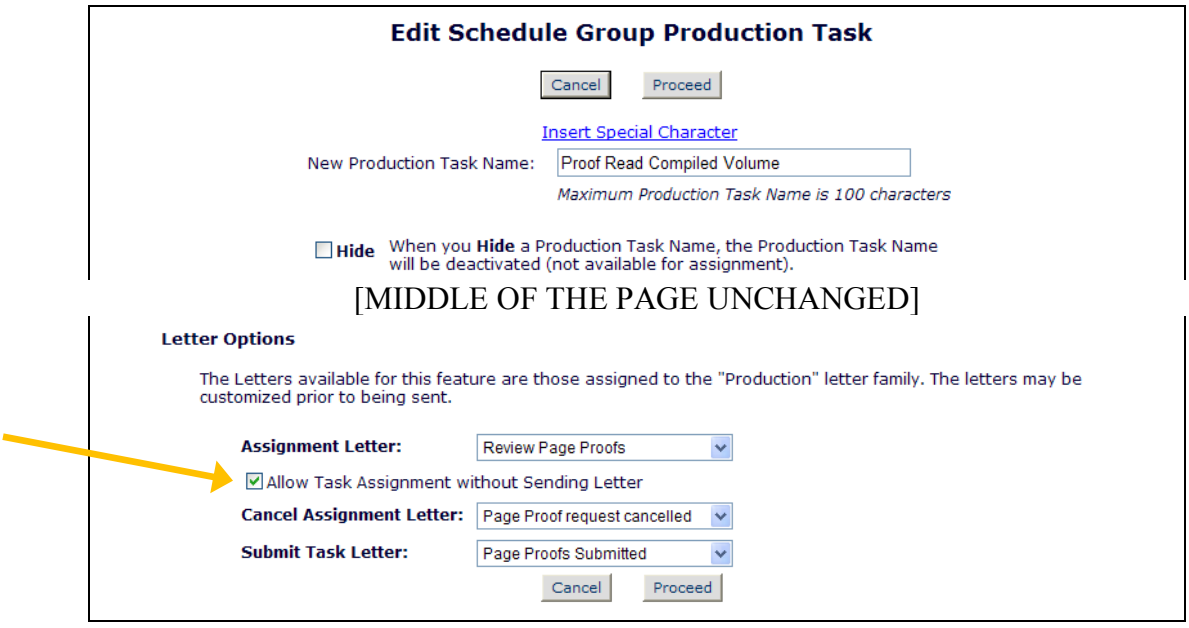
To configure a Schedule Group Production Task to allow the assignment without sending a letter, go to PolicyManager, Configure Schedule Group Production Tasks, and either Edit an existing Task or add a new task. On the *Edit Schedule Group Production Task* page, scroll to the bottom of the page where Letters are selected. Select/Check the new 'Allow Task Assignment without Sending Letter' option under the 'Assignment Letter' selector drop-down.