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Aries Systems Corporation

em Editorial Manager®

Release Notification

Editorial Manager 4.0 Release Notification
Subject to Change

Editorial Manager 4.0 Release Notification

New Look Interface for Author and Reviewer Pages

Version 4.0 includes updated versions of the Author and Reviewer interfaces. Care has been taken not to depart from familiar screen lay-outs (so user retraining is not required). However, the new style is more pleasing to the eye and professional looking. Future versions of EM will apply the updated design to Editor and Publisher pages.

Here are some examples of the changes made to Author pages:

Here are some examples of the changes made to Reviewer pages:
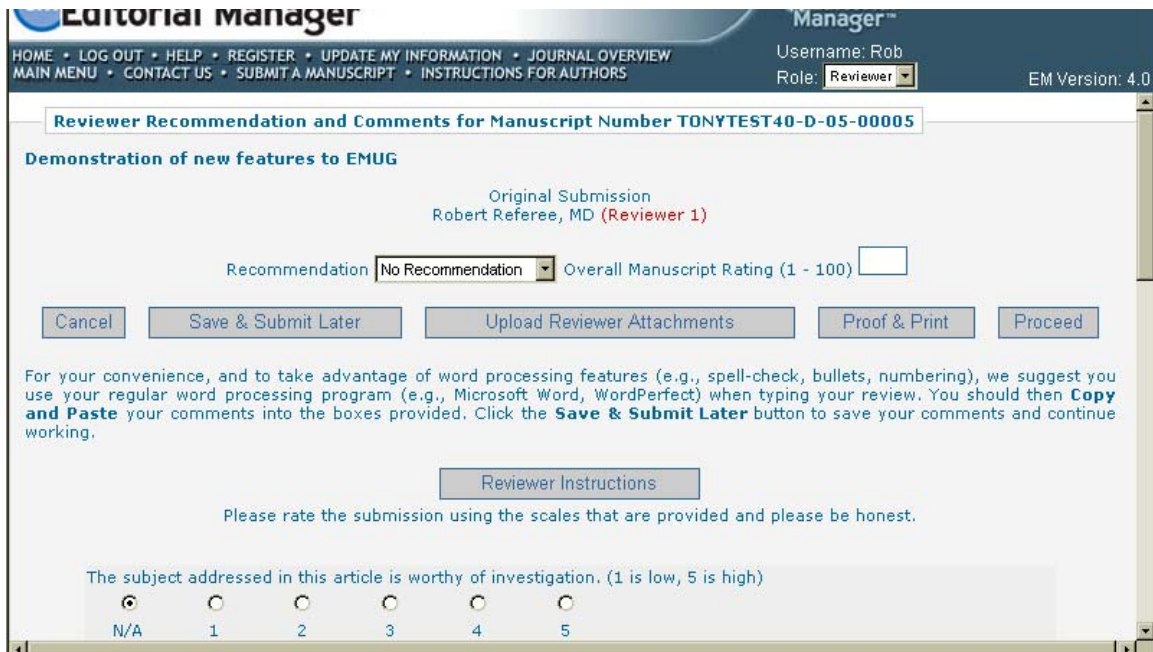
This new look has also been applied to the Login pages and the Registration pages. These changes can be previewed in the 'Login Options' and 'Registration Instructions' sections below.

TO CONFIGURE: No configuration is required to activate the new look.

The new interface has been implemented using a Browser technology called CSS (Cascading Style Sheets). Although the benefits of this technology may not be immediately apparent, from a technical point of view it provides the foundation for significantly greater journal/publisher branding in future versions.

New Format for Manuscript Details

The Manuscript Details page has been re-formatted to maximize use of space on the page, and display the data in a more aesthetically pleasing format.

Details for Manuscript Number demo-D-03-00072
"Test MSNum4"

Cancel   Save and Close

Manuscript Notes   Editors   Reviewers   Alternate Reviewers

Corresponding Author:	Anthony Author, MD 📧 Harvard Medical School Boston, MA UNITED STATES [Proxy]
Corresponding Author E-Mail:	talves@ariessys.com
Author Comments:	

Other Authors:	
Article Type:	Original Study
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Initial Date Submitted:	Sep 5 2003 9:44AM
Status Date:	Sep 25 2003 6:29AM
Current Status:	Under Peer Review
Transmittal Form:	Link to Transmittal Form
Final Disposition:	
Corresponding Editor:	Edward Editor, MD, Editor-in-Chief

Manuscript Notes: Top

☐ Display Manuscript Notes Flag   Insert Special Character

Blinded Editors:	Blind Editors

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EDITORS

Name:	Edward Editor, MD [Proxy]
Role:	Editor-in-Chief
Date Editor Assigned:	Sep 5 2003 9:47AM
Date Editor Completed:	
Elapsed Days:	734
Recommendation:	

REVIEWERS

Name:	Caroline Webber, MBA (Reviewer) [Proxy]
Review Status:	Review Complete
Date Reviewer Invited:	Sep 25 2003 6:29AM
Date Reviewer Agreed:	Sep 25 2003 6:30AM
Date Review Due:	10/19/2003
Date Review Completed:	Jun 6 2004 10:33AM
Elapsed Days:	255
Recommendation:	Major Revision

Name:	Richard Wynne, PhD (Reviewer) [Proxy]
Review Status:	Reviewer Declined

Name:	Robert Referee, MD (Reviewer) [Proxy]
Review Status:	Un-invited Before Agreeing to Review
Date Un-invited:	Oct 1 2003 1:31AM

ALTERNATE REVIEWERS

There are no Alternate Reviewers currently selected for this manuscript.

Cancel   Save and Close

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Log-In Options

In the current implementation of Editorial Manager (pre-4.0), the Login Page has a single design, common to all journals. Some journals would like to have more flexibility in the aesthetics of the Login Page. Some journals would also like to make items, such as guidelines or other resources, available from the Login Page.

Customizable text can be displayed on the Login Page. This might be used for important notices or highlights and can be easily updated by the journal at any time in PolicyManager. The text is HTML compliant, so the journal can include hyperlinks to external sites and choice of font style and color.

Links to resources can be included in the customized text. The journal can upload documents, such as Author Guidelines, Reviewer Instructions, Copyright Transfer Agreements, etc., and make these documents accessible via a hyperlink from within the custom text.

A journal can upload an image, such as a journal cover, society emblem, or other graphic for display on the Login page. This is easily updated by the journal at any time in PolicyManager.

Shading in the Login Box is customizable, allowing a journal to match the colors of the Login pages with the Navigation Bar, or with an uploaded graphic. This is easily updated by the journal at any time in PolicyManager.

The 'Send Username/Password' screen can have custom text, links to documents/resources, and can reflect the journal's color choice.

The text that appears above the Login Box, when a user has an error trying to login to the system, is customizable by the journal. The journal's color choice will also display.
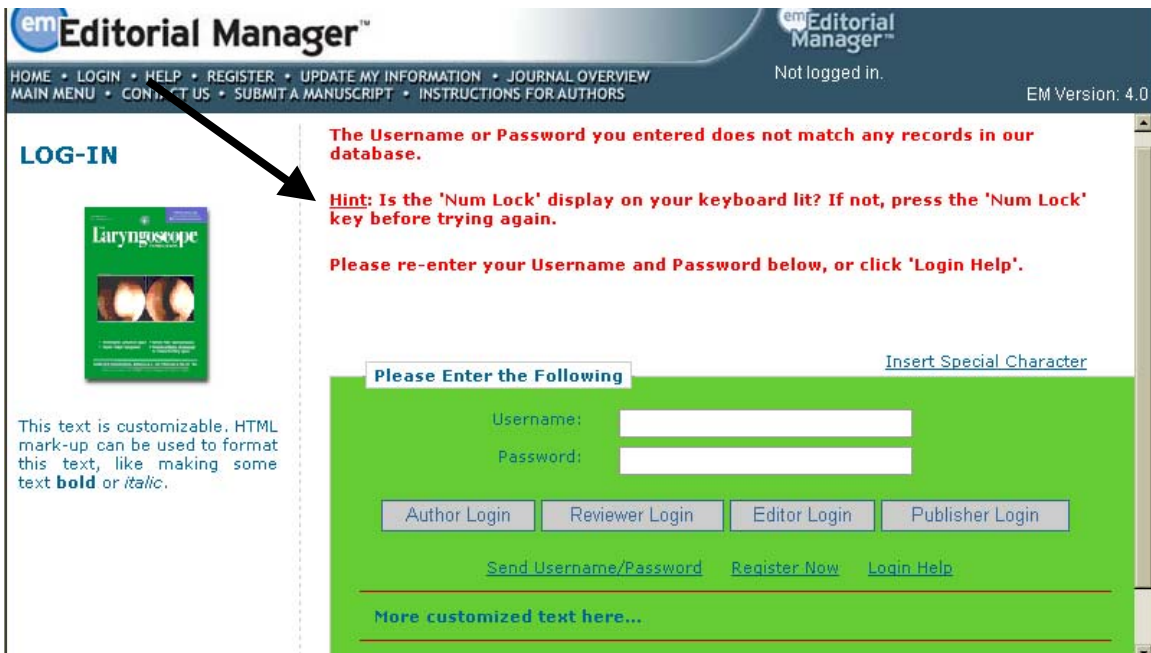
For journals participating in Inter-Journal Resource Sharing (IJRS – Journals that share People information), users can choose to login to a particular journal in the group.
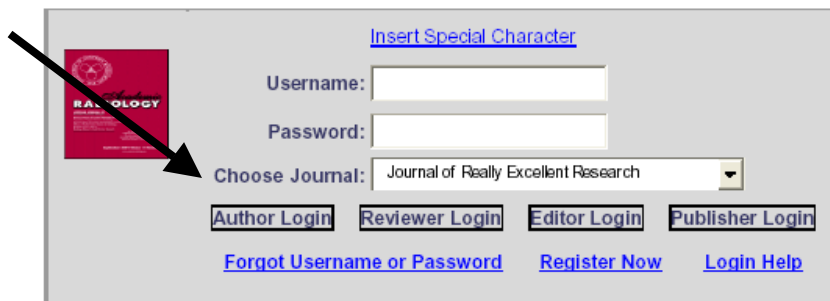
TO CONFIGURE: There are several different options for customizing your Login Page. Go to PolicyManager, then to Registration and Login Policies and click on the link labeled 'Configure Login Page'.

The first option is 'Theme Color'. You may enter the RGB color code, or select a color from the pallet by clicking the 'Choose Color' link.

The second option is 'Login Header Text'. You may enter text in the textbox provided. HTML mark-up can be used to format the text.

Multiple files can be stored on the system, and links to those files can be included in the customized text on the Login Page (both header and footer text). To insert a link to an uploaded file, put your cursor where ever you would like the link to appear in the custom text (in either the Login Header Text textbox or Login Footer Text textbox). Then click the link labeled 'Insert File Reference' at the upper left corner of the textbox. The HTML reference will appear in the text.
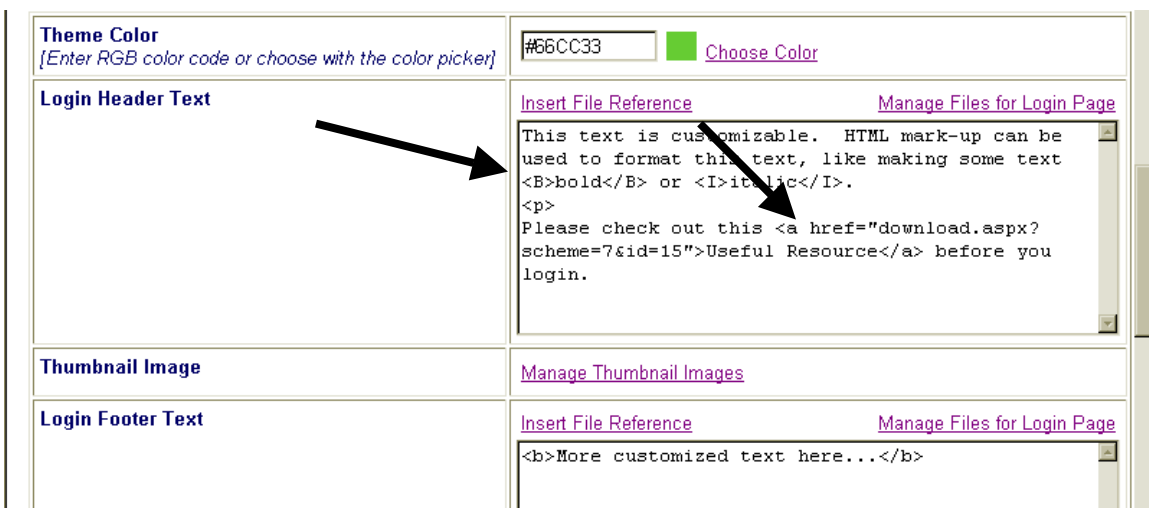
To upload file that will be accessible from the Login Page (as discussed above), click the 'Manage Files for Login Page' link at the upper right corner of the custom textbox. You

can upload multiple files, as well as Download a file, Edit/Replace a file or Remove a file. To upload a file click the 'Upload New File' button. This will lead you to the Upload New File page.

Enter a Description (this will be used as a label for the hyperlink), enter the file path or browse for the file, and then click the 'Upload This File' button. The file will appear in the list on the Manage Files for Login Page.

The third option is 'Thumbnail Image'. You may upload a graphic that will appear to the left of the Login Box. To upload an image, click on the link labeled 'Manage Thumbnail Images'.

From the Manage Thumbnail Images page, enter the file path or browse for the file, and then click the 'Attach File' button.

Manage Thumbnail Images

A Thumbnail Image is already set up on the Login page. This image may be replaced with a new image. To upload a replacement image, 'Browse' to select a file and click 'Attach File' to upload. The replacement image will *not* be immediately visible on the login page. Instead, it will be available for preview until 'Submit' is pressed on the 'Configure Login Page' window. When the Login Page configuration is saved, the replacement image will become visible and the old image will be deleted.

The maximum file size allowed for upload is 100 KB.

Thumbnail Image (current)   Thumbnail Image (new)

Remove   **None**

File Name: [   ] Browse...

Close   Attach File

NOTE: Only one image can be saved. If you upload a new image, the existing image will be overwritten.

NOTE: The maximum file size for an image is 100KB.

The fourth option is 'Login Footer Text'. The Login Footer Text appears below the Username and Password entry boxes and is customized the same way as the Login Header Text.

Theme Color *[Enter RGB color code or choose with the color picker]*	#66CC33 🟩 Choose Color
Login Header Text	Insert File Reference Manage Files for Login Page This text is customizable. HTML mark-up can be used to format this text, like making some text \<B>bold\</B> or \<I>italic\</I>. \<p> Please check out this \Useful Resource\ before you login.
Thumbnail Image	Manage Thumbnail Images
Login Footer Text	Insert File Reference Manage Files for Login Page \More customized text here...\

The fifth option is 'Send Username and Password Text'. You may enter text in the textbox provided. HTML mark-up can be used to format the text. There are Default

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Instructions that can be restored at anytime by clicking the link labeled 'Revert to Default Instructions'.

The sixth option is 'Login ErrorText'. You may enter text in the textbox provided. HTML mark-up can be used to format the text. There are Default Instructions that can be restored at anytime by clicking the link labeled 'Revert to Default Instructions'.

NOTE: The Default Instructions are in bold, red type.

Registration Instructions

In the current implementation of Editorial Manager (pre-4.0), a journal may customize instructions on the Registration page and on the Select Personal Classifications page. Customizable text can now be displayed on the 'Pre-Registration' page (the page that checks if a user is already registered). Custom text can appear to the left of the Pre-Registration Box and below the text entry boxes within the Pre-Registration Box.

TO CONFIGURE: Go to PolicyManager, then to Registration and Login Policies and click on the link labeled 'Edit Registration Instructions'. You may enter text in the textboxes provided. HTML mark-up can be used to format the text. There are Default Instructions that can be restored at anytime by clicking the link labeled 'Revert to Default Instructions'.

Role Switching and Default Role

Role Switching

In the current implementation of Editorial Manager (pre-4.0), a user must log in and out of the system in order to switch roles. For example, if an Editor wants to perform a Reviewer task, the user must click the 'Log Out' link on the Navigation Bar, and then click the 'Login' link to log back in as a Reviewer.

Users can now switch roles without logging in and out. A new dropdown list of a user's available roles is displayed in the banner area of the Navigation Bar. Clicking on this dropdown list allows a person logged in as one role to easily switch to another role, without having to log out and log back in.
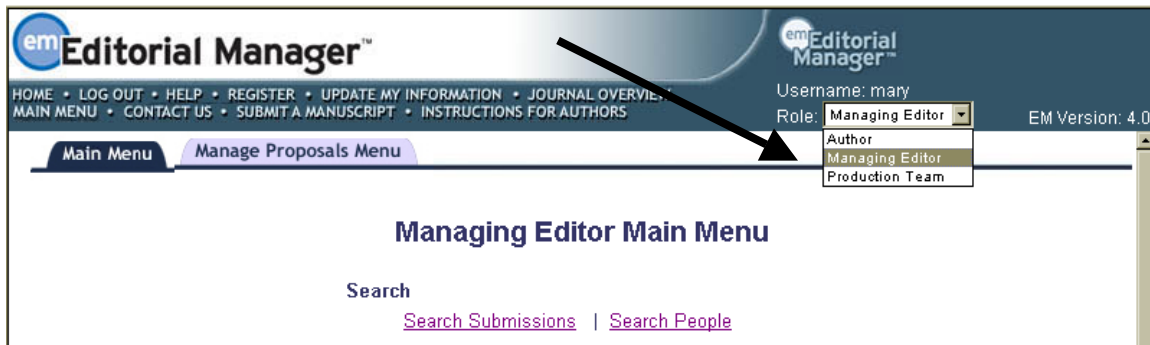
TO CONFIGURE: To enable Role Switching, go to PolicyManager, then to Registration and Login Policies and click on the link labeled 'Enable Role Switching'. Check the box next to the label 'Enable Role Switching'.
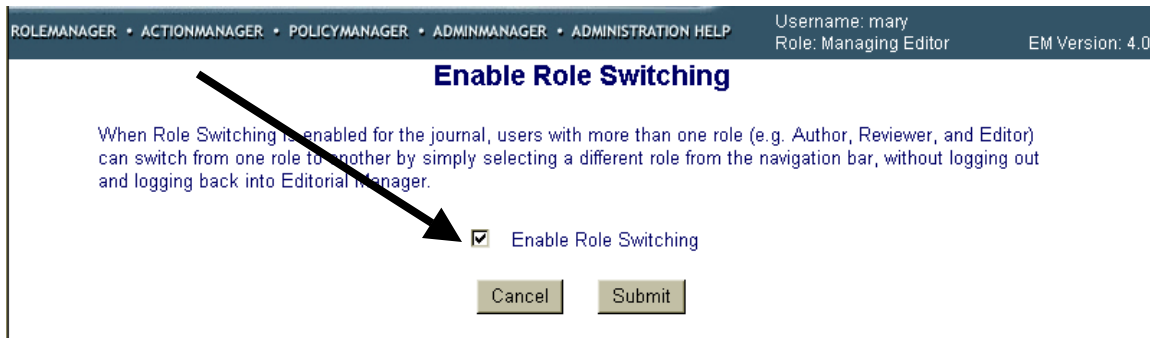
Default Role

A user can also identify a 'Default Login Role' on the 'Update My Information' page. The Default Login Role is the role that a user automatically logs in as when striking the 'Enter' key, after entering a username and a password on the Login Page (rather than clicking a specific role button).

NOTE: Only the roles that a user is allowed to play are available as Default Roles in the dropdown box on that user's Update My Information page.

NOTE: The standard Default Login Role is Author. If a user does not specify a different role on the Update My Information page, then the user will be automatically logged in as an Author when striking the Enter key on the Login Page (rather than clicking a specific role button).

The journal office or an Editor with Search People RoleManager permission can also select a Default Login Role for a user. This is done on the Search People – Update Information page.

TO CONFIGURE: No System Administration is required to enable this feature.

Manuscript Number on PDF Cover Page

The Author/Editor PDF and the Reviewer PDF files are built when an Author submits a manuscript. A unique cover page is incorporated into each version of the PDF. The cover page contains data about the submission, such as Title, Authors, Key Words, etc. This information is pulled into the cover page using merge fields (such as %ARTICLE_TITLE%) that are populated on the cover page when the PDF is built.

The Manuscript Number is among the items included on the cover page. However, when the original PDF is built the Manuscript Number field is blank on both versions of the PDF because the manuscript number is not yet available. The manuscript number does not appear on the PDF cover page for any submission unless the Editor edits the submission and rebuilds the PDFs.

The system has been enhanced to automatically insert the Manuscript Number on the cover page when the number is assigned (either when the submission is assigned to an Editor, or when the number is assigned manually). A PDF rebuild by the Editor is no longer required in order to get the Manuscript Number included on the PDF cover page.

TO CONFIGURE: No configuration is required.

Expanded MEDLINE Integration

In the current implementation of Editorial Manager (pre-4.0), Reviewers and Editors with appropriate RoleManager permission (Search Similar Articles in MEDLINE) have limited access to MEDLINE from the system via the Knowledge Finder® search engine. Authors and Publishers do not currently have any ability to search MEDLINE from the system.

When an Editor or Reviewer clicks the 'Similar Articles in MEDLINE' Action link, the title of the submission is automatically sent to the Knowledge Finder® search engine. The user can then view, export or e-mail the results, but there is no mechanism to perform a new search with different criteria.

Expanded Access to MEDLINE via Knowledge Finder®

The 'Search Similar Articles in MEDLINE' feature has been expanded so that users can refine or create new searches. The 'Search Similar Articles in MEDLINE' results will continue to be returned in the same manner, but users will have the added benefit of creating a new search from the results page.

TO CONFIGURE: No configuration is required for users (Editor Role and Reviewer Role) with 'Search Similar Articles in MEDLINE' RoleManager permission already enabled.

For users without this permission enabled, go to RoleManager, then to the desired Role Family (Author, Reviewer, Editor, Publisher), then to the specific role, and click the checkbox labeled 'Search Similar Articles in MEDLINE'.

Author and Publisher Access to MEDLINE via Knowledge Finder®

The 'Similar Articles in MEDLINE' feature is now available to the Author Role and Publisher Roles.

TO CONFIGURE: Go to RoleManager, then to the desired Role Family (Author and/or Publisher), then to the specific role, and click the checkbox labeled 'Search Similar Articles in MEDLINE'.

Search Author Publications in MEDLINE

The 'Search Similar Article in MEDLINE' feature performs the initial search using the title of the submission. A new feature has been added that allows Editor or Reviewer Roles to conduct a MEDLINE search using the Authors' names. This feature is enabled for Reviewers and Editors via a new RoleManager permission 'Search Author Publications in MEDLINE'.

For Reviewers, a Knowledge Finder® icon is displayed next to Author and Co-Author Names on the New Reviewer Invitation page and on the Pending Reviewer Assignments page.

New Reviewer Invitations for Andrea Cracchiolo, M.D.

You have been invited to review the following manuscripts. Please Agree to review or Decline to review the manuscript.

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

Action	Manuscript Number	Article Type	Article Title	Date Reviewer Invited	Days Invitation Outstanding	Editor's Name	Corresponding Author	Other Authors
View Submission Agree to Review Decline to Review Similar Articles in MEDLINE	STACEYTEST30-D-04-00015	AQC and arXiv Testing	Test	Jul 14, 2004	0	Gene Hackman, M.D.	Raj D Rao, MD, Medical College of Wisconsin KF	Jack Black, MD, University College KF ; Sam Green KF

For Editors, a Knowledge Finder® icon is displayed next to Author and Co-Author Names on a submission's Details page, in Search People in the Search Results, and on the People Information page.

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Details for Manuscript Number STACEYTEST30-D-04-00015
"Lyme Disease in Children"

Cancel   Save and Close

Corresponding Author:	Raj D Rao, MD KF Medical College of Wisconsin Milwaukee, WI UNITED STATES [Proxy]
Corresponding Author E-Mail:	trash@ariessys.com
Author Comments:	
Other Authors:	Jack M. Black, MD KF Sam Green, MD, Hope Hospital, sgreen@hospital.org KF Mary White, PhD., University, mwhite@aol.com; mary@yahoo.com KF
Article Type:	AQC and arXiv Testing

Search People - Search Results

Insert Special Character   Help with Searching

| Criterion | Selector | Value | User Role | |
| Last Name | Begins With | rao | ALL | END |

| Last Name | Begins With | | END ▼ |
| Last Name | Begins With | | |

Clear   Search

Page: 1 of 1 (2 total People Matches)   Display [100 ▼] results per page.

Merge People	Name ▲▼	City ▲▼	State ▲▼	Country ▲▼	Author Role	Reviewer Role ▲▼	Editor Role ▲▼	Publisher Role ▲▼
☐	Anand R. Rao, B.S. KF	Alexandria	VA	United States	[Author]			
☐	Raj D Rao, MD KF	Milwaukee	WI	USA	[Author]	[Reviewer]		

People Information - Serena S. Hu, M.D.

Summary Statistics   Detailed Statistics   Search Author in MEDLINE KF

Cancel   Save and Close

General Information

| Permanent Address: | University of California San Francisco
500 Parnassus Avenue
Rm MU 320W
San Francisco, CA 94143
UNITED STATES
415-476-2495
FAX: (415)476-1304
trash@ariessys.com |
| People URLs: | None |

TO CONFIGURE: Go to RoleManager, then to the desired Role Family (Editor and/or Reviewer), then to the specific role, and click the checkbox labeled 'Search Author Publications in MEDLINE'.

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Third Party Bibliographic Reference Database Integration

In the current implementation of Editorial Manager (pre-4.0), the Search Similar Articles in MEDLINE feature provides direct access from the system to the MEDLINE search engine Knowledge Finder®.

This feature has been expanded, so that other third-party bibliographic databases (Ovid, SCOPUS, PubMed, etc) and search engines (Yahoo, Google, etc.) can be accessed directly from the system.

As with the existing 'Search Similar Article in MEDLINE' implementation, the user clicks an Action link on EM, the predefined information (such as Title, Author, etc.) would be passed to the third-party search engine, and the results would appear in a new pop-up window. All login verification is performed 'behind-the-scenes' and is transparent to the user.

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Curr Sta ▲
View Submission Details History Download Files Edit Submission Classifications Undo Assignment Assign Editor Invite Reviewers Solicit Commentary Similar Articles in MEDLINE Search in Google.com Search in Pubmed Search OVID MEDLINE Google Scholar Submit Editor's Decision and Comments	TONYTEST30-D-04-00013	Original Study	Test of Submission Items	Anthony Author, MD	May 28 2004 1:30PM	Jun 28 2004 1:31PM	Rece by E

TO CONFIGURE ROLEMANAGER: A new RoleManager permission 'Bibliographic Search' is added to Author, Reviewer, Editor and Publisher RoleManager. This permission is only displayed in RoleManager if a Bibliographic Search has been enabled for the journal.

If multiple Bibliographic Search strategies have been set up for a journal, then the administrator can select which search strategies should be accessible to which roles. This means that different roles can have access to different types of searches on different databases.

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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
Bibliographic Search
    ☐ Search Google.com
    ☐ Pubmed Search
    ☐ Search in OVID MEDLINE
    ☐ Google Scholar
    ☐ Scopus - Title Search
    ☐ Scopus - Author Search

Configuration of Searches

The Hosting Administrator (e.g., Aries Systems, a journal publisher) is responsible for the creation and maintenance of searches strategies for searching bibliographic databases and search engines.

The journal must contact their Hosting Administrator (organization that hosts the system) or publisher in order to set up search strategies.

Search strategies can be comprised of specific merge fields that relate to the manuscript. Following is a list of merge fields that can be used in a Search Strategy:

- %ARTICLE_TITLE% - Inserts the title of the manuscript.
- %ABSTRACT% - Inserts the Abstract entered by the Author in the Submit Abstract step of the Manuscript Submission function.
- %CORRAUTHOR% - Inserts the name of the Corresponding Author (title, first, middle, last).
- %CORRAUTHOR_INST% - Inserts the name of the institution of the Corresponding Author.
- %COAUTHOR_NAMES% - Inserts the names of all Authors using a first initial and a last name separated by a space (e.g., R Wynne T Alves S Lavelle). This will include the Corresponding Author. This merge field is not available for use in Letters.
- %CORRAUTHOR_WITH_FIRST_INITIAL% - Inserts the Corresponding Author name with the first initial (e.g., R Wynne). This merge field is not available for use in Letters.
- %MS_CLASS_SEARCH% - Inserts a list of the Classifications assigned to the manuscript. Multiple terms are separated by spaces. This is a separate merge

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field than the one used for Letters (%MS_CLASS%). This merge field is not available for use in Letters.

- %KEYWORDS_SEARCH% - Inserts a list of the Keywords assigned to the manuscript. Multiple terms are separated by spaces. This is a separate merge field than the one used for Letters (%KEYWORDS%). This merge field is not available for use in Letters.

Letter Families

The purpose of the Letter Families is to limit Letter dropdown selection boxes to those letters assigned to a particular Family.

For example, when an Editor sends Reminder Letters to Reviewers, the Editor will be presented with a dropdown selection box of letters assigned to the 'Reviewer Reminder' Letter Family, NOT the entire list of letters in EM.

The following Letter Families are available:

Letter Family	Purpose
Ad Hoc From Author	Available from Author folders
Ad Hoc From Reviewer	Available from Reviewer folders
Ad Hoc From Editor	Available from Editor folders
Ad Hoc From Publisher	Available from Publisher folders
Decision	For Notify Author Letters (Decision Letters). Author Notification letter dropdown (on Edit Editor Decision Term page in PolicyManager) is limited to this Letter Family.
Author Reminder	Available from Author Reminder Reports
Editor Reminder	Available from Editor Reminder Reports
Reviewer Reminder	Available from Reviewer Reminder Reports
Reviewer Invitation	Available from Select Reviewer interface
Reviewer Notification	Available on the Edit Editor Decision Term page only, sent to Reviewers during Notify Author of Decision process.
Batch E-mail	The Letter dropdown on the Batch-E-mail page is limited to these letters.
Production	For production purposes.
General	All other letters, default family

At upgrade only the following existing letters will be automatically assigned a Letter Family:

- Author Notification Letters (Decision Letters) configured in PolicyManager, Edit Editor Decision Terms. These will be assigned to the 'Decision' Letter Family.
- Letters configured for the 'Reviewer Invited' and 'Promote Alternate Reviewer' Events in ActionManager. These will be assigned to the 'Reviewer Invitation' Letter Family.

All other Letters will be assigned to the 'General' Letter Family.

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Functions that allow the user to select a letter from a dropdown list, such as the Reminder Report functionality, will continue to display all General Letters until at least one letter is assigned to the relevant Letter Family. For example, on the Reviewer Reminder Report, after an Editor runs the report, there is an opportunity to send letters to all late Reviewers. The dropdown list of letters will contain all letters from the 'General' Letter Family until someone with administrative permission assigns at least one letter (in PolicyManager, Edit Letters) to the 'Reviewer Reminder' Letter Family. Once this happens, then only letters assigned to that Family will appear in the dropdown box.

TO CONFIGURE: Go to PolicyManager, then to the Email and Letter Policies submenu and click on Edit Letters. A new column labeled 'Letter Family' identifies which Family each letter belongs to.

Click on the Edit link (either the Text version or the HTML version, depending upon which is active) next to the letter that needs to be assigned to a Letter Family.

On the Edit Letter page, click the dropdown box labeled 'Letter Family' and select the appropriate Family.

Editor Deep Links

A Deep Link is a hyperlink in an e-mail that performs a specific action when the recipient clicks on it.

A new merge field %EDITOR_DEEP_LINK% can be inserted into any Editor letter that is associated with a submission that has a manuscript number. When an Editor receives an e-mail with this merge field, the merge field will display as a link.

Date: Aug 27, 2004
To: "Ed Editor" ed.editor@ariessys.com
From: "The Journal" em@journal.org
Subject: Submission Needs More Reviewers

Dear Dr. Editor

We would like to bring your attention to MS Number 03-1007. This submission requires additional Reviewers before it can be considered for publication.

Click this link to access the submission, and take action as needed:
http://staceytest31.edmgr.com/l.asp?i=8&l=VKLHQVV6

Thank you for your prompt attention.

When this Deep Link is clicked from the e-mail, the Editor will be logged into EM and brought directly to the submission record in the Search Submissions interface. All of the Action links that the Editor is allowed to access will be available (based on RoleManager Settings and on appropriate actions based on where the submission is in the system (same as Search Submissions)).

TO CONFIGURE: There is no configuration required to utilize the %EDITOR_DEEP_LINK%. However it is recommended (for security purposes), that the journal set an expiration policy for the deep link.

To set the expiration policy, go to the Set Editor Deep Link Expiration page in the PolicyManager Main Menu (in the General Policies section).

There are two options for expiration of the Editor Deep Link. This applies only to the Editor Deep Link (%EDITOR_DEEP_LINK%), and does not apply to any Reviewer Deep Links:

1. Expire link after X clicks - If this is selected, the link expires after the number of times the link is clicked by the user.
2. Expire link after X days - If this is selected, the link expires after the number of days entered by the Administrator. The 'start date' of an Editor Deep Link's existence is the date the e-mail was sent from the system.

NOTE: If the Administrator selects both options, the link expires when the first parameter is met (i.e. number of days or number of clicks). If the Administrator does not check either box, the Editor Deep Link will persist indefinitely.

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Set Editor Deep Link Expiration

As a security measure, the journal should specify how long the Editor Deep Link (%EDITOR_DEEP_LINK%) remains active. To keep the link active indefinitely, do not check either box. If both boxes are checked, the link expires when the first criteria is met.

☑ Expire link after `2` clicks

☑ Expire link after `4` days

[Cancel] [Submit]

If the user clicks an Editor Deep Link from an e-mail that has already expired, the following page will be displayed:

Link Expired

In accordance with the policies of your journal, this link has expired. Please contact your journal office, or click the link below to login with your username and password.

Return to Main Menu

NOTE: If the %EDITOR_DEEP_LINK% merge field is included in an Editor letter, but the recipient does not have 'Search Submissions' permission, he will be taken to the appropriate results page (after clicking the Deep Link), but will not be able to further use the Search Submissions tool.

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Ad Hoc E-mails

Editorial Manager users (Editors, Authors, Reviewers and Publishers) sometimes need to send e-mail messages outside of the context of particular EM ActionManager Events. For example: to provide instructions, clarify a point, make a request, etc. To accommodate this need, an 'Ad Hoc E-mail' feature has been added to the system.

Journals will be able to configure default Ad Hoc E-mails in PolicyManager, Edit Letters. The journal will be able to configure as many default Ad Hoc E-mails as they desire. All Role Families can have access to Ad Hoc E-mails functionality via RoleManager permission.

Ad Hoc E-mails must be assigned to the Author, Reviewer, Editor or Publisher 'Ad Hoc' Letter Family by the journal (see the 'Letter Families' section above for more on Letter Family).

Add Letter

Please enter a Letter Purpose and Subject, and select a Letter Family for your new letter. Letter Families are used so that the correct type of letter is available for certain functions (such as Reviewer Reminders and Editor Decisions). After you select a Letter Family, the page will refresh and allow you to enter additional information about this letter, including the Letter Body.

Letter Purpose:	Query to Journal
Subject:	Query to Journal
Letter Family:	Please select a Letter Family

Please select a Letter Family
Ad Hoc From Author
Ad Hoc From Reviewer   ontinue
Ad Hoc From Editor
Ad Hoc From Publisher
Decision

The Ad Hoc letters assigned to the appropriate Role Family will then appear in a dropdown list when a 'Send E-Mail' link is clicked from the Action column of any folder in which it appears.
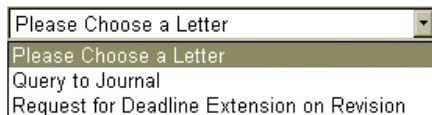
For example, Ad Hoc E-mails can be set up for Authors. This means that an Author will see an Action link labeled 'Send E-Mail' when accessing any list of submissions.

Action	Title	Date Submission Began	Status Date	Current Status
View Submission Edit Submission Approve Submission Remove Submission Send Email	fifth try	Nov 23 2004 3:58PM	Jun 13 2005 4:35PM	Needs Approval

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When this Action link is clicked, the Author will access a dropdown box that lists all Ad Hoc letters that have been configured by the journal.

Send Ad Hoc Email

The journal has pre-configured one or more letters which you may use as a starting point. Select a letter, then click 'Customize Letter' to open the letter, insert your comments, and send the letter.

```
Please Choose a Letter                          ▼
Please Choose a Letter
Query to Journal
Request for Deadline Extension on Revision
```

All Ad Hoc correspondence generated from a manuscript-related page are saved to Correspondence History.

NOTE: The journal may create an 'empty' letter with no text, to allow free-form entry from the user.

NOTE: People Information merge fields will not be populated when the letter is previewed. This is because there could be multiple recipients for that letter. Each individual e-mail recipient will see a letter that is populated with his or her People Information.

NOTE: THERE IS NO BLIND CC. Those who receive an Ad Hoc e-mail will see all the recipients' e-mail addresses, whether they are primary recipients or cc'd on the e-mail.

NOTE: Recipients who are cc'd on an Ad Hoc email will receive multiple copies if there are multiple primary recipients. For example, if an Ad Hoc e-mail is sent to the Handling Editor and the Journal Office, with a cc to the Author, then the Author will receive two copies of the e-mail (one copy of the e-mail sent to the Handling Editor, and one copy of the e-mail sent to the Journal Office).

TO CONFIGURE POLICYMANAGER: Go to PolicyManager, then to the Email and Letter Policies submenu and click on Edit Letters.

To set up a new letter as an Ad Hoc E-mail, click the button labeled 'Add New Letter'. From the Add New Letter page, enter the 'Letter Purpose' and 'Subject', and then select the appropriate Ad Hoc Letter Family (i.e., Ad Hoc From Author, Ad Hoc From Reviewer, Ad Hoc From Editor, Ad Hoc From Publisher). This is the Role Family that will have access to the letter. For example, a letter from a Reviewer requesting a deadline extension would be in the 'Ad Hoc From Reviewer' family.

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After clicking 'Continue' you will be delivered to a page where the letter can be composed and where letter recipients can be selected.

All Ad Hoc E-mails contain customizable instructions. This allows the journal to explain the purpose and function of the letter to the user (sender). The default instructions can be customized. Also, default instructions can be restored.

A series of checkboxes allows you to select the recipients for a particular Ad Hoc E-mail.

The first checkbox is the journal e-mail address from the 'Set E-Mail From' page in PolicyManager. Other possible recipients include Corresponding Editor, First Assigned Editor, Handling Editor, Editor who made the First Assignment, All Reviewers, and the Corresponding Author.

NOTE: The individual names will not display in any letter that is sent; only the individual Roles for each recipient will display.

You can also configure checkboxes that allow the sender to choose to cc: others on the e-mail.

Cc: Recipients include Co-authors, All Assigned Reviewers, and All Assigned Editors.

NOTE: The cc: recipients will not be copied automatically – the sender must check off each cc:box when sending the letter.

You can also select to include a blank textbox so the sender can insert any e-mail address. Multiple e-mail addresses must be separated by a semicolon.

NOTE: If the journal selects anything other than the default address, and when the letter is sent there is no one with that particular association with the manuscript (for example, there is no Handling Editor), then the letter is sent to the 'Set E-Mail From' address instead.

NOTE: Any existing letter can be turned into an Ad Hoc Letter. Click on the Edit link next to the letter you wish to change, and then select the Letter Family from the dropdown box. The page will refresh and you will have the opportunity to enter/edit the instructions and select the recipients as described above.

TO CONFIGURE ROLEMANAGER: To allow particular Roles access to Ad Hoc E-mails you must first create Ad Hoc letters as described above, and then go to RoleManager and enable the permission for each individual Role.

For example, to allow Authors to send Ad Hoc e-mails, go to Author Role and find the permission labeled 'Send Ad Hoc E-Mail'.

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
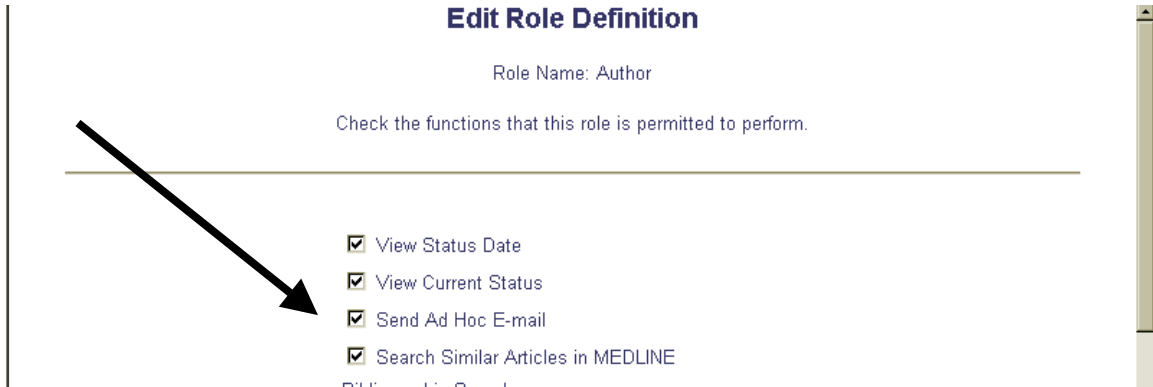
NOTE: Ad Hoc Letters must be created and assigned to one of the four Ad Hoc Letter families, AND the related Role must have RoleManager permission turned on in order for the user to access and send Ad Hoc correspondence.

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Select Reviewer Invitation Letters

In the current implementation of Editorial Manager (pre-4.0), when an Editor invites Reviewers, there is a choice to send a default letter or customize the default letter (for one or more Reviewers) and send it. The default letter is specific to each Reviewer Role and is configured in PolicyManager, Edit Letters and associated with the 'Reviewer Invited' Event in ActionManager, on the ActionManager Letters page corresponding to the Reviewer Role.

Similarly, if an Alternate Reviewer is promoted, the Alternate Reviewer receives the Letter configured for the 'Promote Alternate Reviewer' Event in ActionManager, on the ActionManager Letters page corresponding to the Reviewer Role held by the Alternate Reviewer.

This enhancement allows Editors to select from multiple Reviewer Invitation Letters when inviting Reviewers and selecting Alternate Reviewers. The new functionality will allow the Editor to send the default Invitation Letter, or select an alternative Invitation Letter 'on-the-fly'. For example, an Editor might wish to send a different Invitation Letter to a Reviewer when asking the Reviewer to review a revised manuscript. This different letter will be available in a dropdown box, along with all other letters configured in the 'Reviewer Invitation' Letter Family. All letters will be customizable by the Editor before being sent.

TO CONFIGURE POLICYMANAGER: At upgrade, the letter currently associated with the 'Reviewer Invited' Event in ActionManager for each Reviewer Role is automatically assigned to the 'Reviewer Invitation' Letter Family, and will be available as the first choice in the dropdown Letter selection box when a Reviewer is invited.

If additional letters are desired, the journal should click the Edit Letters link in PolicyManager (under the 'Email and Letter Policies' heading), and click the Edit link next to the individual letter that is to be assigned to the 'Reviewer Invitation' family. The journal should then select 'Reviewer Invitation' from the Letter Family dropdown box, and click the 'Save' button. These letters will then be available when a Reviewer is invited.

You may also create new Reviewer Invitation Letters in PolicyManager. Go to PolicyManager, then to the Email and Letter Policies submenu and click on Edit Letters. Click on the 'Add New Letter' button. From the Add New Letter page, enter the 'Letter Purpose' and 'Subject', and then select the 'Reviewer Invitation' Letter Family.

Edit 'Reviewer Invitation' Letter

Please enter a Letter Purpose and Subject, and select a Letter Family for your new letter. Letter Families are used so that the correct type of letter is available for certain functions (such as Reviewer Reminders and Editor Decisions). After you select a Letter Family, the page will refresh and allow you to enter additional information about this letter, including the Letter Body.

[Cancel]   [Save]

Letter Purpose:	Reviewer Invitation
Subject:	Reviewer Invitation for %ARTICLE_TITLE%
Letter Family:	Reviewer Invitation ▾
Line Wrap:	soft ▾
Sender's E-mail Address:	⦿ "The DEMO Journal" <talves@ariessys.com>
	○ Use Corresponding Editor's E-mail address

Letter Body:

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


Dear %TITLE% %LAST_NAME%,
```

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Alternate Reviewers can be sent Customized Letters

In the current implementation of Editorial Manager (pre-4.0), when an Editor selects Alternate Reviewers, there is no option to customize the Invitation Letter. When the Alternate Reviewer is Promoted, the Reviewer receives the default Invitation Letter configured for the 'Promote Alternate Reviewer' Event in ActionManager, on the ActionManager Letters page corresponding to the Reviewer Role held by the Alternate Reviewer.

Invitation Letters to Alternate Reviewers can now be customized and saved so that the customized letter can be sent during the automatic promotion of the Alternate Reviewer. The 'Select Alternate Reviewers – Invitation Letter' page is automatically displayed when an Alternate Reviewer is selected from the 'Select Alternate Reviewers' page.

NOTE: Clicking the 'Confirm Letter Choice and Proceed' button is necessary in order to save the letter choice. The journal is then returned to the 'Reviewer Selection Summary' page. If the 'Cancel' button is clicked, the letter choices are not saved, but the Alternate Reviewers are selected and Alternate Reviewers will receive the default letter if they are Promoted.

Additionally, letters to Alternate Reviewers that have been customized and queued up can be edited at any time before they are sent.

For example, an Editor, after making the initial choice of the Invitation Letter for the Alternate Reviewer, may realize that a mistake was made in the letter or may want to further customize the letter prior to sending. Invitation Letters queued up for Alternate Reviewers can be accessed from the Reviewer Selection Summary page for a particular manuscript, by clicking the Alternate Review Invitation Letter link on the 'Reviewer Selection Summary' page.

Alternate Reviewers

Select more Alternate Reviewers - [Search for Reviewers ▼] from [All Reviewers ▼] [Go]

<u>Alternate Reviewer Invitation Letter</u>

⬇ <u>Jill Tenth</u> (Reviewer)   <u>Promote</u>   <u>Remove</u>
⬆ <u>William Third, PhD</u> (Reviewer)   <u>Promote</u>   <u>Remove</u>

Alternate Reviewers will be promoted if: (1) Invited Reviewer declines the review invitation, (2) Reviewer is un-invited by an Editor prior to a Decision, (3) Reviewer does not respond to the invitation within the number of days specified above.

<u>Request Unregistered Reviewer</u>   <u>Register and Invite New Reviewer</u>
<u>My Suggest Reviewer Preferences</u> <u>My Reviewer Display Preferences</u>

<u>Return to Submissions with Reviewers Invited - No Response</u>

<u>Return to Main Menu</u>

TO CONFIGURE POLICYMANAGER: At upgrade, the letter currently associated with the 'Promote Alternate Reviewer' Event for each Reviewer Role is automatically assigned to the 'Reviewer Invitation' Letter Family, and will be available as the first choice in the dropdown letter selection box when Alternate Reviewers are selected.

If additional letters are desired, the journal should click the Edit Letters link in PolicyManager (under the 'Email and Letter Policies' heading), and click the Edit link next to the individual letter that is to be assigned to the 'Reviewer Invitation' family. The journal should then select 'Reviewer Invitation' from the Letter Family dropdown box, and click the 'Save' button.

You may also create new Reviewer Invitation Letters in PolicyManager. Go to PolicyManager, then to the Email and Letter Policies submenu and click on Edit Letters. Click on the 'Add New Letter' button. From the Add New Letter page, enter the 'Letter Purpose' and 'Subject', and then select the 'Reviewer Invitation' Letter Family.

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP   Role: Editor-in-Chief   EM Version: 4.0

Edit 'Reviewer Invitation' Letter

Please enter a Letter Purpose and Subject, and select a Letter Family for your new letter. Letter Families are used so that the correct type of letter is available for certain functions (such as Reviewer Reminders and Editor Decisions). After you select a Letter Family, the page will refresh and allow you to enter additional information about this letter, including the Letter Body.

[Cancel]   [Save]

Letter Purpose: [Reviewer Invitation]
Subject: [Reviewer Invitation for %ARTICLE_TITLE%]
Letter Family: [Reviewer Invitation ▼]
Line Wrap: [soft ▼]
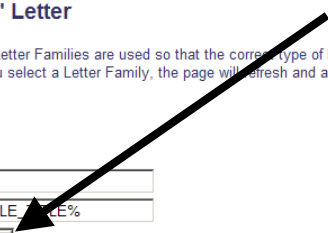Sender's E-mail Address: ⦿ "The DEMO Journal" <talves@ariessys.com>
                           ○ Use Corresponding Editor's E-mail address
Letter Body:

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

Dear %TITLE% %LAST_NAME%,
```

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Reviewer 'Thank You' Letter

In the current implementation of Editorial Manager (pre-4.0), a Reviewer can be sent a thank you letter when a review is submitted. Many journals would also like to send tailored letters to Reviewers when a specific Decision Letter is sent to the Author.

An enhancement to the PolicyManager, Edit Editor Decision Terms, allows the journal to configure a Reviewer Notification Letter (thank you letter) to be associated with each Author Notification Letter (Decision Letter). A different Reviewer Notification Letter can be configured for each Editor Decision Term.

Editor Decision Terms

Listed below are the terms used for Editor Decisions. You may Add new terms, Remove, Edit or Hide existing terms.

Cancel   Add New Term

Update Order

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Decision Family		
1	Minor Revision	Editor Decision - Minor Revise	Reviewer Notification of Decision and Thank You	Revise	Revise	Remove	Edit
2	Reject	Editor Decision - Reject	Reviewer Notification of Decision and Thank You	Reject	Reject	Remove	Edit
3	Major Revision	Editor Decision - Major Revise	Reviewer Notification of Decision and Thank You	Revise	Revise	Remove	Edit

The Reviewer Notification Letter is displayed immediately after the Editor sends the Author Notification Letter (Decision Letter) to the Author, and can be customized before being sent.

Reviewer Notification Letters

The following Reviewers have submitted reviews for this manuscript. Click the link in the Reviewer Notification Letter column if you want to customize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

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

Continue Without Sending Any Reviewer Letters   Send All Letters

Reviewer	Manuscript Number	Revisions Reviewed	Article Title	Reviewer Notification Letter	Do Not Send Letter
Brian Lewis (Reviewer)	DEMO-D-03-00019	Original Submission	Another NEJM demo	Reviewer Notification of Decision and Thank You	☐
Robert Referee (Reviewer)	DEMO-D-03-00019	Original Submission	Another NEJM demo	Reviewer Notification of Decision and Thank You	☐

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The Author Notification Letter (Decision Letter) can be inserted into the Reviewer Notification Letter and can be blinded before it is sent to the Reviewer. A new merge field is created for use in the Reviewer Notification letters: %DECISION_LETTER%. This merge field %DECISION_LETTER% pulls in the blinded or unblinded version of the decision letter, depending on the permission of the Reviewer recipient in Reviewer RoleManager.

TO CONFIGURE LETTERS: You must first create Reviewer Notification Letters in PolicyManager. Go to PolicyManager, then to the Email and Letter Policies submenu and click on Edit Letters. Click on the 'Add New Letter' button. From the Add New Letter page, enter the 'Letter Purpose' and 'Subject', and then select the 'Reviewer Notification' Letter Family.

If you already have a Letter that you would like to use for this purpose, then click on the Edit link next to that Letter. On the 'Edit Letter' page, go to the Letter Family dropdown box and select the 'Reviewer Notification' Letter Family.
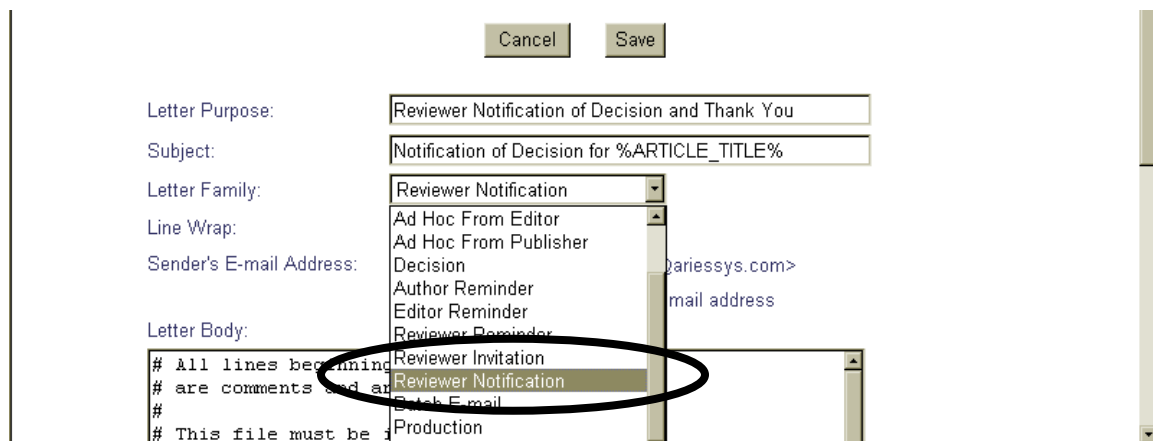
By assigning the Letter to the 'Reviewer Notification' Letter Family you will make the Letter available for selection on the Edit Editor Decision Terms page.

After one or more Reviewer Notification Letters are created, go to the Reviewer and Editor Form Policies submenu, and under the Editor Decision Policies heading click the 'Edit Editor Decision Terms' link.

Different Reviewer Notification Letters can be associated with different Decision Terms, or you can associate one Reviewer Notification Letter with all Decision Terms. To select which Reviewer Notification Letter goes with which Decision Term click on the Edit link associated with the desired Decision Term.

On the Add/Edit Decision Term page, click the dropdown box labeled 'Reviewer Notification Letter'. The dropdown box will display all letters in the Reviewer Notification Letter Family. Select the letter that you wish to associate with the specific Decision Term you are working with.

Save and Submit Later on Notify Author of Decision

In the current implementation of Editorial Manager (pre-4.0), in the Notify Author of Editor's Decision feature, there is no way to modify the Author Notification Letter (Decision Letter) and save it to send later. If the Editor or journal office makes edits to the Author Notification Letter, but decides to send it later and cancel out of the process, then they lose all of the edits.

The Notify Author of Editor's Decision feature has been enhanced with a Save and Submit later function for the Author Notification Letter. This means that modifications can be made to the Author Notification Letter, and those changes can be saved without having to actually send the letter. This is useful for journals that would like to have an Editor review the final Author Notification Letter before it is sent.

NOTE: If an Editor who makes a Decision on a paper also has RoleManager Permission to 'Notify Author of Editor Decision', and that Editor uses the Save and Submit Later function, the submission will move to the Editor's 'My Assignments with a Decision' folder and to the 'All Submissions with Editor Decision' folder.

TO CONFIGURE: No configuration required.

Resending Letters from Correspondence History

A record and a copy of all letters related to a manuscript that are sent from the system are stored in History. The Correspondence History section of the History page contains a list of all of these letters. Each letter can be viewed by clicking on the hyperlink associated with the letter.

From the View Letter page the user can view the letter that was sent as well as 'Resend' the letter to the original recipients. The recipients are displayed at the top of the letter.

TO CONFIGURE: No configuration is required.

Add '0' column to the 'Reviews Complete' grid

In the current implementation of Editorial Manager (pre-4.0), the 'Reviews Complete' grid displays the number of submissions that have 1 Review Complete, 2 Reviews Complete, 3 Reviews Complete, and 4+ Reviews Complete. This grid appears at the top of the Editor Main Menu for Editors with appropriate RoleManager permission.

Some Editors would like to see all of their assignments that have NO reviews complete included in the grid. To accomplish this a '0 Reviews Complete' column has been added to the 'Reviews Complete' grid.

Editor-in-Chief Main Menu

Submissions With:

0 Reviews Complete	1 Review Complete	2 Reviews Complete	3 Reviews Complete	4+ Reviews Complete
24	8	2	0	0

Search
        Search Submissions | Search People

Editor 'To-Do' List
    My Pending Assignments (35)
        Direct-to-Editor New Submissions (1)
        Direct-to-Editor Revised Submissions (1)

TO CONFIGURE: No configuration is required to make the '0 Reviews Complete' column appear if the Editor Role already has the 'View Completed Reviews Grid in Main Menu' RoleManager permission enabled.

NOTE: This grid will only display submissions for which the Editor viewing the grid is the Handling Editor. This means that if an Editor has assigned another Editor to a submission, then that submission will not appear in the grid until the second Editor has made a Decision. Likewise, if an Editor is being skipped in the Decision Chain, then the submission will not appear in the grid, because the Editor's attention is not required.

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Assignment Status Report

This report is designed to provide a journal-wide quick-glance of the status of each submission assigned to an Editor. It provides a tool for locating submissions anywhere in the review cycle, from the point at which an Editor is assigned, to when the Author is notified of the decision. This will allow Editors and journal staff to identify submissions that require some 'prodding' or additional action.

The report includes the following functionality:

1. Ability to send customizable Reminder Letters to Editors regarding the need for additional Reviewer assignments (similar to existing Reminder Reports).

2. Result set includes 'snapshot' of all Reviewers associated with the current revision of the submission, with color-coded review status for easy reference.

3. Action links (e.g. Invite Reviewers and Submit Editor's Decision and Comments) are displayed in the results onscreen, so the Editor can move a submission forward.

This report is available from the Reports Menu under the Editor Reports header (for Editors with RoleManager permission to 'Produce Reports'), and the Send Reminder Letters menu under the Editor Reminder Reports header (for Editors with RoleManager permission to 'Send Editor Reminders'). If an Editor also has the RoleManager permission 'Restrict Reminder Reports to Assigned Submissions' enabled, then the results will be limited to that Editor's assignments only. In addition, if an Editor is blinded on a submission, he will not see the submission in the results.

To run this report, the user selects All Editors, a particular Editor Role, or an individual Editor name, and can further refine the selection criteria by Article Type and/or Section/Category.

If the user checks the box 'Create extraction data file for download', the results can be automatically downloaded into Excel. This option is particularly useful, because the Assignment Status Report shows a lot of information on screen, and the user may need to scroll to see all of the information in the browser window. The extract file formats the data nicely in Excel, which some users may find easier to use.

NOTE: This report automatically excludes Proposals, submissions not yet assigned to an Editor, submissions with the Author for revision, and all submissions with a Final Disposition.

Assignment Status Report

Content: This report displays all submissions in the review cycle, between the time the Editor is assigned and the Author is notified of the decision.

Please select the report parameters.

Handling Editor: [Please Choose: ▼]

You may further refine your result set by selecting all, or choosing one or more values 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, hold down the 'Command' key while using the mouse to select the desired items.

Article Type:
```
Clinical
Research
Case Report
Current Concepts Review
```
Select All   Clear All

Section/Category:
```
Primer
Supplement
```
Select All   Clear All

☐ Create extraction data file for download

[Cancel] [Submit]

As mentioned previously, this report is intended to provide the 'complete picture' of submissions in the review cycle. The result set may include:
- Submissions assigned to an Editor but no Reviewers have been invited or assigned
- Reviewers invited who have not yet responded
- Reviewers who have agreed but not yet submitted their review
- Reviewers who have completed their review
- Submissions with Required Reviews Complete but Editor has not made a decision
- Editor has made a decision, but Author has not yet been notified

The following action links are displayed for each submission, depending on the user's RoleManager permissions, and where the submission is in the review cycle:
- View Submission
- Details
- History
- Invite Reviewers
- View Reviewer and Editor Comments
- Submit Editor's Decision and Comments

The following information is displayed in the report results for each submission:
- Manuscript Number
- Article Type

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- Date MS/Revision Submitted – This is the Initial Date Submitted if it is an original submission. If it is a revision (R1, R2, etc.), this is the date the revision was submitted to the journal office.
- Days Under Review – This is a new calculation that indicates the total days the submission has been under review, from the time that the first Reviewer was invited or agreed to review, depending on the journals Reviewer Due Date Preferences.
- Reviewer Name & Status – This column lists each Reviewer invited to review the current version of the submission, along with the Reviewer Role. The Reviewer Name is a hyperlink to the *People Information* page. It also displays the color-coded status of each Reviewer invited to review the submission.
    - Review Complete (green)
    - Agreed (amber)
    - Invited (red)
    - Declined (black)
    - Un-invited Before Agreeing (black)
    - Un-invited After Agreeing (black)
    - Terminated Before Agreeing (black)
    - Terminated After Agreeing (black)
    - Alternate (purple)
- # Additional Reviewers Needed – This calculation identifies the number of Reviewers that are still needed for a particular submission, based on the Required Reviews setting in PolicyManager. Note that this calculation includes outstanding review invitations. This means if 3 reviews are required, 1 is complete, 1 is in progress and 1 has not yet responded to the invitation, the # Additional Reviewers Needed would be 0. If 4 reviews are required, 1 is complete, 1 is in progress and 1 has not yet responded to the invitation, the # Additional Reviewers Needed = 1 and would be displayed in red text.
- # Required Reviews – This calculation identifies the number of reviews that are required for a particular manuscript before a submission is ready for Editor Decision. This number is configured in PolicyManager, Edit Article Type, and can be edited on a manuscript-by-manuscript basis by the Editor who invited Reviewers.
- # Completed Reviews – Number of reviews that have been submitted by Reviewers.
- Handling Editor
- Document Status
- Document Status Date
- Date Last Editor Reminder Sent
- # Editor Reminders Sent

Assignment Status Report – Ed Editor
Content: Submissions for Ed Editor.
If you send a reminder letter, it will go to the Editor(s), not the Reviewers.

This report was run Oct 21, 2004 14:43:50.

Page: 1 of 1 (89 total submissions)   Display [100 ▼] results per page.

Download the Data File

Check All   Clear All

Send Reminder	Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Date MS/Revision Submitted ▲▼	Days Under Review ▲▼	Reviewer Name & Status	# Additional Reviewers Needed	# Required Reviews ▲▼	# Completed Reviews ▲▼	Handling Editor Name ▲▼	Document Status ▲▼	Document Status Date ▲▼	Date Last Editor Reminder Sent ▲▼	# Editor Reminders Sent ▲▼
☐	View Submission History Details Invite Reviewers View Reviewer and Editor Comments Submit Decision and Comments	JBJS-D-03-01207	Original Study	Jun 28, 2004	14	Ron Smith (Reviewer) Review Complete Ron Jones (Reviewer) Agreed Nancy Fifth (Reviewer) Invited Rob Referee (Reviewer) Declined Bill Third (Reviewer) Un-invited Before Agreeing Jane First (Reviewer) Un-invited After Agreeing Julie Kane (Reviewer) Terminated Before	1	4	1	Ed Editor	Under Review	Jul 7, 2004		0

From the report results, the user can choose to send a reminder letter to each Handling Editor by checking the 'Send Reminder' checkbox. The user can send the default letter, or a customized letter, just like other reminder reports.

NOTE: This report sends reminder letters to the Editor, not the Reviewers.

NOTE: If one Editor is listed multiple times in the report (because he has multiple submissions that satisfy the selection criteria), a separate reminder e-mail will be sent for each submission selected. You will have an opportunity to customize the letter, and/or 'Do Not Remind', if you discover that the same Editor has been selected multiple times (i.e. you may not want to send multiple e-mails to the same Editor).

TO CONFIGURE: You will need to create a new letter, or modify an existing letter, in PolicyManager (Edit Letters, under the E-mail and Letter Policies section). This letter should be assigned to the 'Editor Reminder' Letter Family, so that it will be included in the letter selection dropdown list for this report.

Increased Visibility to Reviewer Status Details

Journals have requested additional visibility to the following information, to make more informed choices when sending Reviewer invitations, resulting in a higher likelihood of having reviews completed in a timely manner:

1. Alternate Reviewer Status on Other Submissions
2. Unavailable Status
3. Declined Assignments
4. Un-invited Assignments
5. Terminated Assignments

Alternate Reviewer Visibility
Editors would like to know if a Reviewer is already designated as an Alternate Reviewer, on other submissions before the Reviewer invitation is made. For example, if a potential Reviewer candidate is an Alternate for 6 other submissions, an Editor may not want to select this person as a (primary) Reviewer for a new submission, since it is likely that the Reviewer will be too busy (the Reviewer might get promoted on one of the other papers).

The Select Reviewer page will now indicate that a potential Reviewer is already assigned as an Alternate Reviewer on other submissions. This is achieved by displaying informational red text in the Reviewer Name column on the Reviewer Selection Results pages for all Reviewer selection modes.

Unavailable Status
Reviewers can declare themselves 'unavailable', by entering Unavailable Dates on the Update My Information page, or the journal office can enter Unavailable Dates for users in Search People.

Editors would like to know if a Reviewer has entered Unavailable Dates before they attempt to invite the person. This is achieved by displaying informational red text in the Reviewer Name column on the Select Reviewer page for all Reviewer selection modes. This text is for informational purposes only (i.e. the person can still be invited to review even if they are 'unavailable').

Additionally, if a person is unavailable, a link labeled "Unavailable" will appear in the Reviewer Name column. Clicking the Unavailable link opens a window that displays the start and end dates of unavailability, as well as the Unavailable Reason, if the Reviewer entered one.
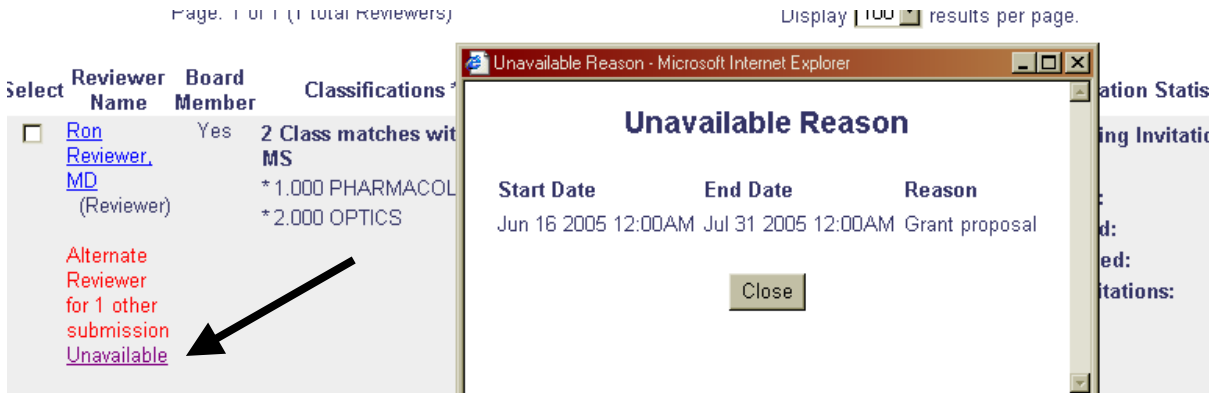
Declined Reviewer Assignments

Editors would like additional visibility to 'Declined' review invitations, and the reason the Reviewer declined. These criteria may be justification for a Reviewer's removal from the Editorial Board, or removal from a journal's Reviewer pool.

Visibility to declined invitations is increased with a new line item ('Last Review Declined') on the Reviewer Statistics grid on the Select Reviewer page for all Reviewer selection modes. This is the most recent date the person declined a review invitation for any submission.

Additionally, the 'Reviewer Declined' text on the Reviewer Selection Results pages is a hyperlink to the Reason for Decline (if a reason was entered).
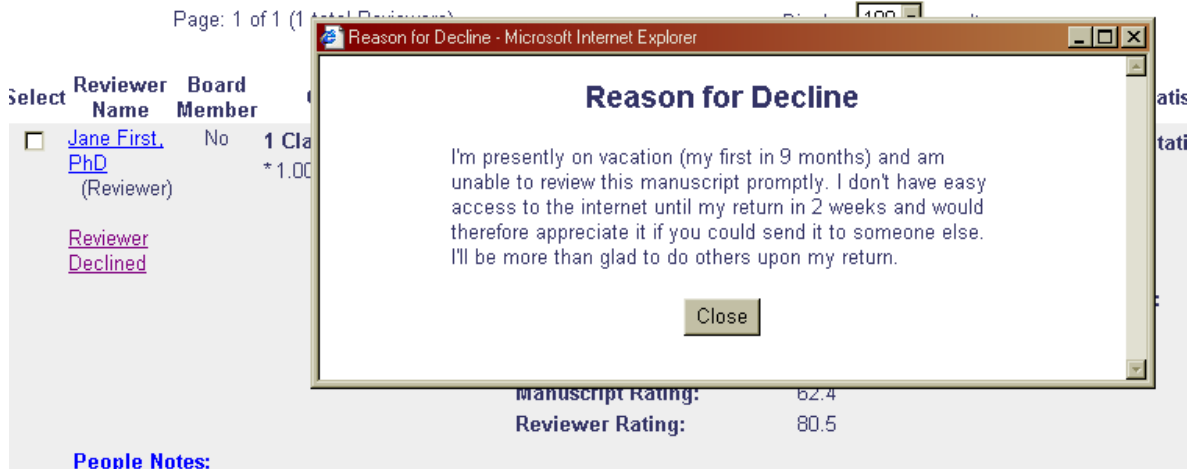
A list of all review invitations Declined by a Reviewer can be found on the People Information page (accessed by clicking on the Reviewer's name).

Declined Reviews

MS Number	Date Invited	Date Declined	Action
DEMO320	Jun 13 2002 10:03PM	Feb 10 2003 2:40PM	Reviewer Declined View Submission Details History
DEMO390R1	Jun 15 2005 9:08AM	Jun 15 2005 9:10AM	Reviewer Declined View Submission Details History
			Reviewer Declined View Submission

Any Reviewers who declined to review are also listed on the Manuscript Details page, along with the Date Declined.

Un-invited Reviewer Assignments
Editors would like additional visibility to assignments where the Reviewer was 'Un-invited'. In particular, it is helpful to know whether a Reviewer was un-invited before or after agreeing to review. It is also helpful to know the total number of the invitations from which a person has been un-invited historically, as this may be an indication that the person is not a suitable Reviewer for the journal.

Visibility to Un-invited Reviews is increased by adding two new line items on the Reviewer Selection Results page. 'Un-invited After Agreeing' is the number of times the Reviewer has ever been un-invited AFTER agreeing to review. This is displayed in the 'Reviewer Statistics (Agreed Invitations)' column. 'Un-invited' (displayed in the 'Invitation Statistics' column) is the total number of times a Reviewer has ever been un-invited BEFORE agreeing to review.

Additionally, two new sections ('Un-invited at Invitation' and 'Un-invited after Agreeing to Review') are added to the People Information page (accessed by clicking on the Reviewer's name), which lists every assignment from which the Reviewer has ever been un-invited.

Un-invited Before Agreeing to Review

MS Number	Date Invited	Date Un-invited	Action
DEMO391	Feb 11 2003 3:43PM	Feb 13 2003 2:00AM	View Submission Details History
DEMO457	Mar 13 2003 2:00AM	Mar 15 2003 1:56AM	View Submission Details History
DEMO473	May 4 2003 11:11AM	May 4 2003 11:26AM	View Submission Details ▶ History

Un-invited After Agreeing to Review

MS Number	Date Invited	Date Un-invited	Action
DEMO-D-03-00011	Mar 11 2003 4:09PM	Mar 20 2003 3:06PM	View Submission Details ▶ History

Un-invited Reviewers (before and after agreeing to review) are also added to the Manuscript Details page.

Terminated Reviewer Assignments

Editors would like additional visibility to assignments where the Reviewer was 'Terminated'. In particular, it is helpful to know whether a Reviewer was terminated before or after agreeing to review.

Visibility to Terminated Reviews is increased by adding two new line items on the Reviewer Selection Results page. 'Terminated After Agreeing' is the number of times the Reviewer has ever been terminated AFTER agreeing to review. This is displayed in the 'Reviewer Statistics (Agreed Invitations)' column. 'Terminated' (displayed in the 'Invitation Statistics' column) is the total number of times a Reviewer has been terminated BEFORE agreeing to review.

eviewer Name	Board Member	Classifications *	Reviewer Statistics (Agreed Invitations)		Invitation Statistics	
rew or, MD eviewer) rew plete	No	3 Class matches with MS *1.000 PHARMACOLOGY *1.080 Antivirals *1.120 NSAIDS (non steroidals)	Reviews in Progress: Completed Reviews: Un-invited After Agreeing: Terminated After Agreeing: Last Review Agreed: Last Review Completed: Last Review Declined: Avg Days Outstanding: Manuscript Rating: Reviewer Rating:	0 11 0 2 Aug 7 2003 11:58AM Oct 13 2003 1:25PM Dec 3 2003 10:20AM 41 72.29 100	Outstanding Invitations: Agreed: Declined: Un-invited: Terminated: Total Invitations:	0 13 9 2 3 27

Additionally, two new sections ('Terminated at Invitation' and 'Terminated after Agreeing to Review') are added to the People Information page (accessed by clicking on the Reviewer's name).

Terminated Before Agreeing to Review

MS Number	Date Invited	Date Terminated	Action
DEMO-D-03-00050	Jun 25 2003 3:09PM	Jun 25 2003 3:19PM	View Submission Details History
DEMO-D-03-00053	Jun 27 2003 10:27AM	Jun 27 2003 10:38AM	View Submission Details History
DEMO369	Sep 18 2002 3:47PM	Sep 27 2002 9:03AM	View Submission Details History

Terminated After Agreeing to Review

MS Number	Date Invited	Date Terminated	Action
DEMO275	Apr 19 2002 2:06PM	Feb 11 2003 12:27PM	View Submission Details History
DEMO450R1	Mar 11 2003 4:11PM	Mar 26 2003 1:34PM	View Submission Details History

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Also, Terminated Reviewers are displayed as 'Terminated at Invitation' or 'Terminated After Agreeing to Review' on the Manuscript Details page.

General Improvements to Reviewer Information

In addition to the increased visibility to Reviewer status details discussed previously, general aesthetic enhancements have also been made to all pages that display Reviewer information and statistics. These improvements provide a more consistent view of Reviewer information, with uniform of color themes and descriptions carried throughout the system.

Reviewer Selection Summary Enhancements
This page is enhanced to reflect the new Review Status Terms, which are consistent with other pages where review information is displayed in the system.

- Review Complete (green)
- Agreed to Review (amber)
- Reviewer Invited (red)
- Reviewer Declined (black)
- Un-invited Before Agreeing to Review (black)
- Un-invited After Agreeing to Review (black)
- Terminated Before Agreeing to Review (black)
- Terminated After Agreeing to Review (black)

Select Reviewer Page Enhancements
In addition to the new Reviewer information discussed previously, new calculations and clarification of terminology have been implemented to make the Select Reviewer page more comprehensive.

- The Reviewer statistics are shown in two separate columns: 'Reviewer Statistics (Agreed Invitations)' and 'Invitation Statistics'.

- 'Pending Reviews' is changed to 'Reviews in Progress'. This calculation includes outstanding review invitations, as well as any reviews currently being worked on (Reviewer has agreed to review).
- 'Not Responded Yet' is changed to 'Outstanding Invitations', and is moved to the top of the new Invitation Statistics column.
- Total Invitations – the sum of Agreed + Declined + Un-invited + Terminated
- Completed Reviews –the total number of reviews the person has ever submitted to the journal office.
- To maximize use of space on the page, 'Manuscript Rating' and 'Reviewer Rating' are moved to the 'Reviewer Statistics (Agreed Invitations)' column.

Select	Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics	
☐	Henry G. Trafton, M.D. (Reviewer)	Yes	Class matches with MS	Reviews in Progress:	2	Outstanding Invitations:	
				Completed Reviews:	5	Agreed:	10
				Un-invited After Agreeing:	2	Declined:	1
				Terminated After Agreeing:	1	Un-invited:	0
				Last Review Agreed:	May 11, 2004	Terminated:	0
				Last Review Completed:	May 11, 2004	Total Invitations:	11
				Last Review Declined:	Sep 09, 2002		
				Avg Days Outstanding:	76		
				Manuscript Rating:	50		
				Reviewer Rating:	87.67		
	People Notes:						

(* indicates match between Reviewer and Manuscript Classifications)

People Information Enhancements

In addition to the new Reviewer information discussed previously, the following information has been carried through to the People Information page.

- 'Pending Reviews' is changed to 'Reviews in Progress'. This calculation includes outstanding review invitations, as well as any reviews currently being worked on (Reviewer has agreed to review).
- New 'Total Completed Reviews' column
- Clarified 'Pending Reviews' header to 'Reviews in Progress and Outstanding Invitations'.

Current Review Statistics

Date Last Agreed	Reviews in Progress	Outstanding Invitations
May 11, 2004	2	0

Historical Invitation Statistics

Total Invitations	Agreed to Review	Declined to Review	Un-invited Before Agreeing to Review	Terminated Before Agreeing to Review
11	10	1	0	0

Historical Reviewer Performance Summary

Total Completed Reviews	Submitted on Time	Submitted Late	Un-invited After Agreeing to Review	Terminated After Agreeing to Review	Date Last Review Completed
5	1	4	2	1	May 11, 2004

Historical Averages

Days to Respond to Invitation	Days to Complete Review	Days Late	# of Reminders	Manuscript Rating	Reviewer Rating
2	73	51	1	50	87.67

Recommendation Summary

A: 1
B: 0
C: 0
C+:   4
Did not review: 0

Reviews in Progress and Outstanding Invitations

MS Number	Date Invited	Date Agreed	Date Due	Elapsed Days	Days Late	Last Remind Date	# of Reminders	Handling Editor	Action
JBJS-D-03-01185	May 11, 2004	May 11, 2004	Jun 05, 2004	485	460		0	Gene Hackman, M.D.	View Submission Details History
JBJS-D-03-01186	May 11, 2004	May 11, 2004	Jun 05, 2004	485	460		0	Gene Hackman, M.D.	View Submission Details History

Completed Reviews

MS Number	Date Invited	Date Agreed	Date Completed	Days Late	# of Reminders	Recommendation	MS Rating	Reviewer Rating	Action

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Modifications to Reviewer Performance Report

The Reviewer Performance Report generates Reviewer performance statistics for all submissions and revisions received by the journal office during the specified time period.

In the current implementation of the system (pre-4.0), the date ranges are limited to predefined time periods (Last Month, Last Quarter, Last Year, Current Month, Current Year and All Dates). Also, the Reviewer Performance Report does NOT currently display statistics if the Reviewer declined to review, was terminated, or was not invited to review during the time period.

The Reviewer Performance Report is modified to include the following enhancements:

Custom Date Option: The user can enter any date range on the Selection Criteria page.

Article Type and Section/Category: Criteria can be refined with selection of Article Type(s) and/or Section/Categories.

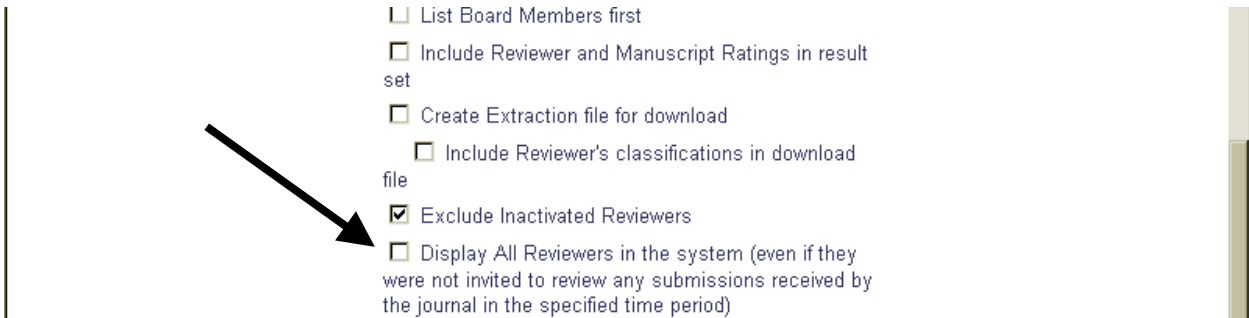**Display ALL Reviewers:** A new checkbox option to 'Display All Reviewers in the system' even if they were not invited to review a submission during the specified time period.

Declines, Termination, and Un-invited Reviewer Visibility: Reviewers with any sort of activity (including declined reviews, terminated reviews and un-invited reviews) will be included in the results for submissions received by the journal office during the specified time period. Also, the Reviewer Performance Report results will include more detailed breakdown of terminations and un-invitations (e.g. whether the person was un-invited or terminated before or after agreeing to review).

The columns displayed in the report results are consistent with the elements displayed on the Select Reviewers pages, People Information, and Manuscript Details.

Reviewer Name	Role	Board Member	Reviews In Progress	Total Invitations	Outstanding Invitations	Agreed	Declined	Un-invited Before Agreeing	Terminated Before Agreeing	Avg Days to Respond	Avg Days to Complete	Submitted On Time	Submitted Late	Avg Days Late	Un-invited After Agreeing	Termi Aft Agre
Thomas Fifth, MD	Reviewer	Yes	1	98	1	73	11	10	3	4	6	54	7	-16	0	
Robert Referee, MD	Reviewer	No	1	133	2	65	12	16	38	3	17	44	12	-3	0	
David Eighth	Reviewer	No	1	8	0	4	1	3	0	0	0	2	0	-24	1	
LSH Reviewer1	Reviewer	No	0	2	0	1	0	0	1	0	0	1	0	-14	0	
LSH Reviewer2	Reviewer	No	0	1	0	0	0	0	1	0	0	0	0	0	0	
Wendy Wetherbee	Reviewer	No	0	1	1	0	0	0	0	0	0	0	0	0	0	
Jane First, PhD	Reviewer	No	0	32	0	19	4	3	6	15	41	12	5	13	0	
John Second, MD	Reviewer	No	0	41	0	29	9	2	1	5	22	20	3	4	0	
William Third, PhD	Reviewer	No	0	14	0	10	1	1	2	6	31	6	2	16	0	

PolicyManager and RoleManager Menu Restructuring

In the current implementation of Editorial Manager (pre-4.0), the list of items in PolicyManager and Editor RoleManager is becoming prohibitively lengthy. This is cumbersome for existing users as they 'hunt' to locate the appropriate item on the page. This also creates a subtle confusion and discomfort for new users who are configuring Editorial Manager for their journal.

Editor RoleManager and PolicyManager menus have been restructured by grouping items into logical categories, or 'headers', so that users can more easily locate the appropriate permissions/functions on the page. Each header is initially displayed 'collapsed' (i.e. the contents within the category are not shown). The user can expand or collapse each list by clicking on a '+' or '-' icon next to each header.

For consistency purposes, Reviewer RoleManager and Publisher RoleManager are also updated to utilize the new collapse/expand functionality.

New Merge Fields

Two new merge fields that can be used in Letters have been added to EM.

%DECISION_LETTER%. Inserts the Author Notification Letter (Decision Letter) into the Reviewer Notification Letter. This merge field %DECISION_LETTER% pulls in the blinded or unblinded version of the Author Notification Letter, depending on the permission of the Reviewer recipient in Reviewer RoleManager.

%EDITOR_DEEP_LINK%. This merge field can be inserted into any Editor letter that is associated with a manuscript. When an Editor receives an e-mail with this merge field, the merge field will display as a link. When this Deep Link is clicked from the e-mail, the Editor will be logged into EM and brought directly to the submission record in the Search Submissions interface. All of the Action links that the Editor is allowed to access will be available (based on RoleManager settings and on appropriate actions based on where the submission is in the system (same as Search Submissions)).

The following Merge Fields can be used when setting up a Search Strategy for searching in a third party bibliographic database (like PubMed) or third party search site (like Google).

- %COAUTHOR_NAMES% - Inserts the names of all Authors using a first initial and a last name separated by a space (e.g., R Wynne T Alves S Lavelle). This will include the Corresponding Author. This merge field is not available for use in Letters.
- %CORRAUTHOR_WITH_FIRST_INITIAL% - Inserts the Corresponding Author name with the first initial (e.g., R Wynne). This merge field is not available for use in Letters.
- %MS_CLASS_SEARCH% - Inserts a list of the Classifications assigned to the manuscript. Multiple terms are separated by spaces. This is a separate merge field than the one used for Letters (%MS_CLASS%). This merge field is not available for use in Letters.
- %KEYWORDS_SEARCH% - Inserts a list of the Keywords assigned to the manuscript. Multiple terms are separated by spaces. This is a separate merge field than the one used for Letters (%KEYWORDS%). This merge field is not available for use in Letters.

NOTE: The following Merge Fields can be used in both Letters and in Search Strategies (these Merge Fields are not new in v.4.0).

- %ARTICLE_TITLE% - Inserts the title of the manuscript.
- %ABSTRACT% - Inserts the Abstract entered by the Author.
- %CORRAUTHOR% - Inserts the name of the Corresponding Author (title, first, middle, last).
- %CORRAUTHOR_INST% - Inserts the name of the institution of the Corresponding Author.

Preprint Manager

Preprint Manager is a companion product to Editorial Manager and is designed to handle journal processes that relate to production and distribution of the manuscript rather than peer review.

Traditionally, manuscript production tracking and distribution tasks have taken place downstream from peer review. While this made sense in paper-based systems, the advent of electronic manuscript submission and peer review has enabled selected production and distribution tasks to take place in parallel to traditional print workflows.

For example, some journals may wish to offer Web access to newly accepted manuscripts immediately following acceptance in the Editorial Manager environment, rather than waiting for completion of the traditional print production cycle. Preprint Manager offers a way for online subscribers to view and download PDFs of accepted manuscripts prior to print publication.

Existing Preprint Manager features include:

WebFirst: "WebFirst", enables the journal to publish an accepted manuscript online prior to the hard-copy publication. The online full-text PDF can be viewed from within EM or from a link on the journal's non-EM web site. The PDF can be configured to be a free download, or a pay-per-view download.

Artwork Quality Check: Editorial Manager will interact with third-party Artwork QC tools via a generic interface (using XML), which allows transmittal of the artwork files from EM to a designated Artwork Quality Checking system. The Artwork QC system analyzes the artwork, and provides results back to Editorial Manager via XML. These results are then made available to the Author and/or Editor on designated pages, and to the Editor on the Transmittal Form.

Author Supplementary Materials like video and audio: Preprint Manager allows Authors to submit audio, video, movie and other files that are not possible to build into a PDF format. These files will be accessible via a link in the PDF, similar to the 'download high-resolution image' link that exists in the current version of EM.

Reviewer Supplementary Materials (Reviewer Attachments): Reviewers may want to upload files as part of a review. These files might be images, related materials, or an annotated manuscript.

TO CONFIGURE PREPRINT MANAGER: A publisher or individual journal can license the entire Preprint Manager product, or license individual components of Preprint Manager. If Editorial Manager is provided to you by your publisher, please contact your publisher concerning Preprint Manager. If you have licensed Editorial Manager directly from Aries Systems, please contact your Account Coordinator.

Reference Checking and Linking

Reference Linking and Reference Cleanup is offered as part of the Preprint Manager suite of products. The first Reference Linking and Cleanup tool to be available is Inera Incorporated's eXtyles Reference Linking and Reference Cleanup.

Reference Linking will facilitate editorial and peer review of submitted articles by allowing faster review of cited literature. Hyperlinks to PubMed and/or CrossRef will be generated for each reference citation in the Author's submission file. The hyperlinks are accessible within the system, on the 'Reference Checking Results' page for each submission.

The Reference Checking Results page is accessed via an Action link labeled 'View Reference Checking Results'.

The Reference Checking Results page is also accessed via a link in the manuscript PDF labeled 'Click Here to View Linked References'.
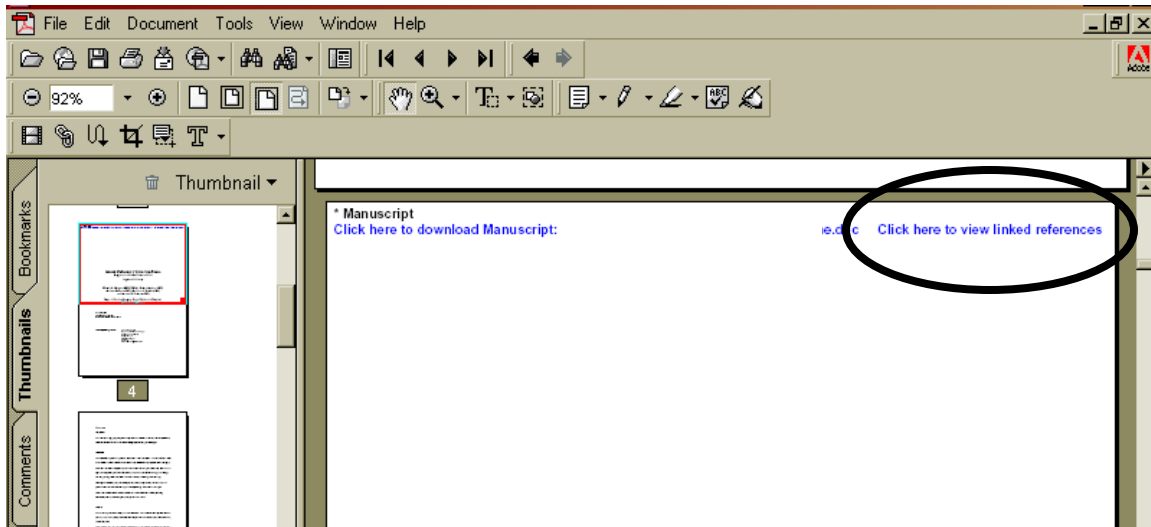
Reference Cleanup will provide Editors with reference lists that have automatically been 'cleaned up' (formatted to a specific style) by eXtyles, allowing Editors to reduce copy editing time and produce more accurate references in the published article. A 'cleaned up' Word file will be available for download from the system. The 'cleaned up' file contains the reformatted citations, as well as hyperlinks to PubMed and CrossRef for each citation that could be matched on those services.

A 'marked up' Word file is also available for download. The 'marked up' file includes everything in the 'cleaned up' file as well as color-coding delineating different parts of each citation, and Word comments. The 'cleaned up' and 'marked up' files are available for download on the Reference Checking Results page, during the Edit Submission process, and on the Transmittal Form.

NOTE: The 'cleaned up' and 'marked up' files are also available to the Author during the 'Submit Revision' process (if the Author has permission to view them).

Rules for submission: Authors must submit their references in a Word-readable file, with a paragraph heading indicating the reference section (using a heading such as 'References' or 'Bibliography'). The reference list can be part of the main manuscript file or a separate file. The submission files must be configured to go through the Reference Checking process (in PolicyManager – see "To Configure Submission Items" below).

PDFS: The PDFs created from the submission file will include the original source file, with a hyperlink to an Editorial Manager page containing linked results from the Reference Linking or Reference Cleanup tool (as shown above). The text of the link is 'Click here to view linked references'. If results are not yet available, the linked html

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page displays an informational message that testing is in progress. If results are available, the results are displayed on the page.

Edit Submission: If Reference Cleanup is being used, the cleaned up file may be used as a replacement for the original file when the PDF is rebuilt by an Editor, via a checkbox selected by the Editor during the Edit Submission process. The journal may designate whether or not the cleaned up file is automatically substituted for the original source file when an Author submits a revision.


Transmittal Form: If Reference Cleanup is being used, the cleaned up and marked up files are available for download from the Transmittal Form. The cleaned up and/or marked up files may be transmitted along with, or as a replacement for, the original source file.

Error Handling: If a file fails to undergo Reference Checking an error message will appear in the PDF, when the 'Click Here to View Linked References' link is clicked.
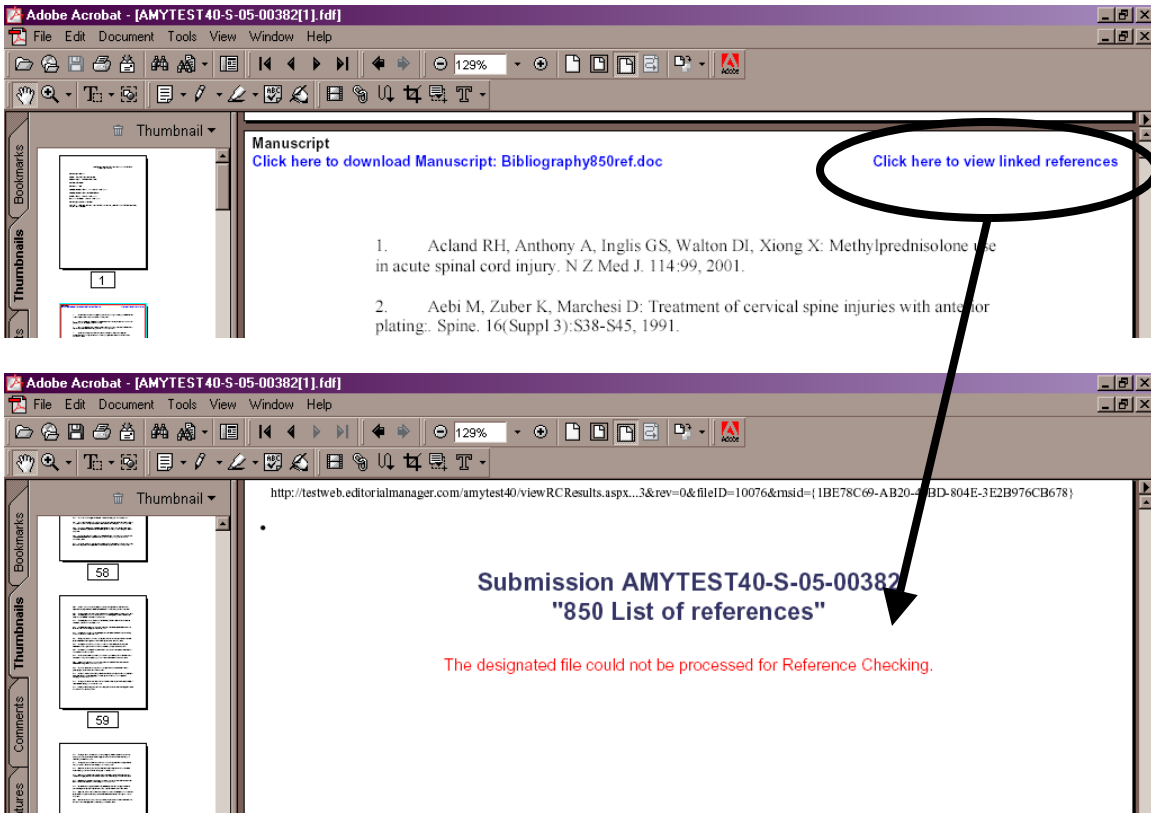
The Transmittal From will also display an error status for any file that has failed to go through Reference Checking. The error status can be found in the column labeled 'Original Item Artwork Quality/Reference Checking Results'.

TO CONFIGURE REFERENCE CHECKING IN POLICYMANAGER: Click the 'Configure Reference Checking' link in the Preprint Manager section of PolicyManager. The journal can then identify whether the submission references should be linked to PubMed and/or CrossRef, specify the workflow points which will trigger Reference

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Checking, select whether the Author can carry forward the source file at time of Revision, and enter customized instructions and comment text.

⬢ Configure Reference Checking
(powered by eXtyles ✖)

Configure one or more Reference Linking methods and the workflow points that will trigger Reference Checking. Add any instructions and text you would like to display on the results page. Submit this page, then click the 'Edit Submission Item Types' link to select at least one Submission Item for Reference Checking.

Cancel   Submit

Select the method(s) for Reference Linking:

☐	Use PubMed ID
	☐ Display error messages on results page
☐	Use CrossRef DOI

Select the workflow points that will trigger Reference Checking:

☐	Original PDF Building by Author
☐	Original PDF Building by Editor
☐	Revised PDF Building by Author
☐	Revised PDF Building by Editor
☐	Author Notified of Editor Decision in the 'Accept' Decision Family
☐	Author Notified of Editor Decision in the 'Revise' Decision Family

Select whether the Author can carry forward the source file at time of Revision:
(If you select "Source file cannot be carried forward", the Author must download or view the results and upload a corrected file. If results are not yet available, or Reference Checking has not yet been triggered, the Author can carry forward the source file by default).

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◉	Source file <u>can</u> be carried forward during Revision
☐ Automatically replace original file with cleaned-up file.	
◑	Source file <u>cannot</u> be carried forward during Revision

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Customize Instructions Displayed on the Reference Checking Results Page

To Authors:

Line Wrap: [soft ▾]   <u>Insert Special Character</u>

> Instructions to Authors:Reference checking is done for journal citati

<u>View Default Instructions</u>   <u>Revert to Default Instructions</u>

To Reviewers:

Line Wrap: [soft ▾]   <u>Insert Special Character</u>

> Instructions to Reviewers:Reference checking is done for journal ci

<u>View Default Instructions</u>   <u>Revert to Default Instructions</u>

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To Editors and Publishers:

Line Wrap: [soft ▼]   Insert Special Character

```
Instructions to Editors and Publishers:Reference checking is done f(
```

View Default Instructions   Revert to Default Instructions

Enter comment text displayed to Authors, next to specific citations which could not be validated.

Insert Special Character

```
```

Maximum 100 characters

[Cancel]   [Submit]

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TO CONFIGURE SUBMISSION ITEMS: A submission item is sent through the Reference Checking process only if it is configured to do so. This choice is made on the 'Edit Master Submission Items' page in PolicyManager (reached via the Edit Submission Items link under the 'Submission Items' section of PolicyManager).

To configure an existing submission item for Reference Checking, the journal should click the Edit link next to the item. To configure a new item for Reference Checking, the journal should enter the appropriate information and click the 'Add New Item Type' button. The journal should then check off the box 'Include this Item Type for Reference Checking'.

There are two additional settings that can be enabled 'This Item Type will contain multiple citations inside a single reference' and 'This Item Type will contain reference annotations'.

The checkbox labeled 'This Item Type will contain multiple citations inside a single reference' should be enabled if your journal regularly receives references that contain more than one citation for each reference. For example, reference number 1 has citation 'a', 'b' and 'c' as follows:

[1]   (a) T.A. Alves, C. Webber, J. *Chem..* **1999**, 923. (b) T.A. Alves, S. Lavelle, *The*

Chem. J. **2003**, *67*, 3456. (c) R.X. Wynne, B. Fore, R.U. Awayque, *Chem. Today*

2001, 3765.

NOTE: This is most commonly found in Chemistry journals.

The checkbox labeled 'This Item Type will contain reference annotations' should be enabled if your journal regularly receives references that contain text that is not strictly citation information. For example, descriptive text explaining why the reference is relevant as follows:

1. Alves AP, Webber CJ, Lavelle S, Wynne R: **Identification of proteins combined by**

   polyacrylamide gel electromyosis. *Anal Physics* 2005, **69**:250-259.

The authors describe a strategy for analysis of in-gel digestion. Phosphopeptmyosis were

identified by mass treatment with alkaline mapping.

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Edit Submission Item Type

Insert Special Character

Item Type: | Manuscript (incl. title, auth, corr.auth., demographics, references, legend, tables, references) |

Maximum 256 characters

Item Type Family: | Default |

PDF Handling:

| Create Link for Image Files only (TIF, GIF, JPEG, JPG, PICT, EPS, PS, BMP, PSD, WPG, PNG) |

Important Note: If 'Build Hyperlink to the Item into the PDF(Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

☐ Include this Item Type for Reference Checking

☐ This Item Type will contain multiple citations inside a single reference.

☐ This Item Type will contain reference annotations.

Cancel   Submit

TO CONFIGURE ROLEMANAGER: For Authors: A 'View Reference Checking Results' link may be displayed in the following Author folders: 'Submissions Waiting for Approval', 'Revisions Waiting for Approval', and 'Submissions Being Processed'. In order to see this link, the Author must have the permission 'View Reference Checking Results' enabled (under the 'Preprint Manager section of RoleManager).

For Editors: A View Reference Checking Results link may be displayed in the following Editor folders: 'Search Submissions', 'New Submissions Requiring Assignment', 'Revised Submissions Requiring Assignment', 'Direct-to-Editor New Submissions', 'Direct-to-Editor Revised Submissions', 'Submissions Needing Editor's Approval' and 'Manuscript Details'. In order to see this link, the Editor must have the permission 'View Reference Checking Results' enabled (under the 'Preprint Manager' section of RoleManager).

For Reviewers: A View Linked Results link may be displayed in the Reviewer folder 'Pending Assignments'. In order to see this link, the Reviewer must have the permission 'View Reference Checking Results' enabled (under the 'Preprint Manager' section of RoleManager).

For Publishers: A View Reference Checking Results link may be displayed in Publisher folder 'Accepted Submissions'. In order to see this link, the Publisher must have the permission 'View Reference Checking Results' enabled (under the 'Preprint Manager' section of RoleManager).