

Welcome to  
**EMUG** 2017  
BOSTON



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# Managing Your Editors

Increase Editor Productivity with Improved Tools  
and Features

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# SESSION OBJECTIVE

- Learn about new features and functions that will:
  - Streamline and improve the Editor user experience
  - Help your Editors to be more efficient and productive



# AGENDA

- Discussion Forum Unread Posts Indicator
- Reviewer Selection and Management
  - Different Default Reviewer Assignment Letters
  - Usability Improvements
  - Proposed Reviewer Ranking and Flag
  - Promote Alternate Reviewers with Different Roles
- Editor Signposting
- Enhanced Automated Summary Reminders
- Editor Decision Letter Phrases
- Author Notification Status in All Submissions with Editor's Decision folder



# Discussion Forum Unread Posts Indicator

New in Release 14.0 – Immediate  
graphic visibility to unread posts

# Discussion Forum Unread Posts Indicator

- Editors can be configured to receive email notifications of every post – too much mail!



- But, if notifications are turned off there is no visual indication that there are new unread posts

- Users must drill down to see if there are new posts

**Editor 'To-Do' List**

- My Pending Assignments (181)
  - Editorial Submissions in Progress (10)
  - Transferred Submissions (9)
  - New Submissions (23)
  - Revised Submissions (1)
  - New Submissions Requiring Assignment (8)
  - Revised Submissions Requiring Assignment (2)
  - Direct-to-Editor Revised Submissions (3)
  - Submissions Needing Approval by Editor (7)
  - Submissions Sent Back to Author for Approval (8)
  - Incomplete Submissions (54)
  - New Invitations (2)
  - New Assignments (1)
  - Editors Invited - None Yet Assigned (4)
  - Submissions with Rescinded Decision (2)
  - Submissions with Required Reviews Complete (1)
  - Submissions Requiring Additional Reviewers (1)
  - Submissions with One or More Late Reviews (1)
  - Submissions with Active Discussions (60)
- Reviews in Progress (1)
  - Reviewers Invited - No Response (0)
  - Submissions Under Review (1)

**Submissions with Reviewers Invited - No Response - Ed P Garcia, M.D.**

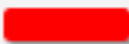
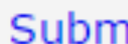
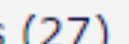

**Contents:** Submissions where one or more Reviewers have neither agreed to nor declined the Review Invitation. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Allow current Reviewers to complete their work; 3) Make a Decision. Use the up/down arrows to change the sort order.

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

▲▼	≡ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status	Editor Decision ▲▼
	<a href="#">View Submission Details</a> <a href="#">Discussions</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">Edit Submission</a> <a href="#">Invite Reviewers</a> <a href="#">Solicit Commentary</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">AuthorMapper Author Search</a> <a href="#">Submit Editor's Decision and Comments</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	STACEYDEV100-D-12-00011	Clinical		EMUG is the Best Meeting Ever!	Stacey J Lavelle, MD	01/10/2012	10/02/2017	Under Review	1 Agreed 3 Invited - No Response 1 Late (more...)	



# In 14.0 - Unread Posts "Badge"

-  Submissions with One or More Late Reviews (2)
-  Submissions with Active Discussions (45)
-  Reviews in Progress (27)
-  Reviewers Invited - No Response (11)

18  
You have 18 unread posts

**Details for Manuscript Number: JERS-D-16-00048, DOI: 10.1903/journal.JERS.0005  
Maney M. Alexander (UNITED KINGDOM): "Polymers"**

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

Manuscript Number	DOI	Full Title	Article Type	Publish Information	Corresponding Author	Corresponding Author E-Mail	Initial Date	
Submitted	Editorial Status	Date	Current Editorial Status	Abstract	<b>Editors</b>	<b>Reviewers</b>	File Inventory	Corresponding Production
Editor	Date Last Revision	Submitted	Final Decision Date	Final Decision Term	Final Disposition	Date		

<b>Manuscript Number:</b>	JANETDEV92-D-12-00048	<a href="#">Top</a>
<b>DOI:</b>	<input type="text"/>	<a href="#">Top</a>
<b>Full Title:</b>	Bubblegum and Soda Po	<a href="#">Top</a>
<b>Discussion Forum:</b>	Discussions <b>2</b>	
<b>Article Type:</b>	Testing CrossCheck - Simple AT	<a href="#">Top</a>
<b>Publish Information:</b>	<a href="#">Publish Information</a>	<a href="#">Top</a>

# Displayed everywhere the Discussions link is shown

Quicklinks

### Search Submissions - Search Results

Article Title is containing 'carbo'

Page: 1 of 1 (1 total submissions) 1

Action	Manuscript Number	DOI	Article Title	Author Name	Article Type	Current Status
<a href="#">View Submission</a> <a href="#">Duplicate Submission Check (x) Details</a> <a href="#">Discussions <span>2</span></a> <a href="#">Production Details</a> <a href="#">History</a> <a href="#">Technical Information</a>	JANETDEV130-D-16-00018	10.1903/journa	CARBOHYDRATE	Maney M. Alexander ▾ 	Original Study	Received by Editor

### Submissions Requiring Additional Reviewers - Mary Jones, PhDϕχ

**Contents:** New and revised submissions requiring additional Reviewers as defined by the p  
Invite Additional Reviewer(s); 2) Make a Decision; 3) Allow current Reviewers to complete th

Page: 1 of 1 (1 total submissions)

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name
<a href="#">Action Links</a> <span>2</span>	JANETDEV111-D-14-00082	Original Study		11.0-36 Use Care 4 - Multi-level questions - OMEGA	Maney M. Alexander, xyz PhD

Page: 1 of 1 (1 total submissions)



# Indicator also shown directly on Discussion page

**Discussion for Manuscript Number: JANETDEV131-D-16-00012R1**  
**Maney M. Alexander, PhD**  
**"Coronal Magnetics"**

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

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

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

**Topic:**

**Comments:** [View/Print All](#)

Participant	Comments	Date
Edward M. Browdy	Great, thanks. We will let you know.	Oct 12 2016 05:05PM
Ginger Rabelais <i>(Reviewer 1)</i>	I would be interested in reviewing the revision of this paper.	Oct 12 2016 03:35PM
Twink E. Jonesey, PhD	I think that Ginger Rabelais would be a good Reviewer for this article.	May 12 2016 03:34PM
Mary Jones, PhD	I haven't heard from Ginger Rabelais yet. Have any of you talked with any possible Reviewer candidates in the last week? <a href="#">(more...)</a>	May 04 2016 03:06PM
Edward M. Browdy	Fortunately, he is available.	Apr 10 2016 03:06PM

[Add Participants](#)

**Editor Participants**

Editor Participant	Role	# Posts	Latest Post	Participant Status	View Reviews and Comments	Download Files	View Draft Decision Letter	
Edward M. Browdy	Associate Editor	1	Oct 10 2016 03:34PM	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>
Mary Jones, PhD	Managing Editor	1	Apr 04 2016 03:06PM	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Send E-mail</a>
Twink E. Jonesey, PhD	Editor-In-Chief	1	Oct 10 2016 03:33PM	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Send E-mail</a>

# Simple to Configure

## PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

**Registration and Login Policies**

**Status Policies**

**Submission Policies**

**Questionnaire Policies**

**Additional Data Policies**

**Editor Assignment Policies**

**Suggest Editor Policies**

**Reviewer and Editor Form Policies**

**E-mail and Letter Policies**

**General Policies**

**Discussion Forums**

[Configure Discussion Forum Settings](#)

[Configure Discussion Topic Templates](#)

[Configure Automatic Discussion Initiation](#)



## Configure Discussion Forum Settings

### Custom Instructions

[Open Special Character Palette](#)

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

It is our publication's policy to seek a second opinion on new submissions before an editor is assigned. We appreciate your recommendation (take this paper, or outright reject this paper) within 48 hours.

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

### Deep Link Expirations

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

Expire link after  clicks

Expire link after  days

Expire when discussion is concluded

### Discussion Indicators

If the checkbox below is selected, discussion badges (e.g. **17**) are displayed to alert a user when new comments have been posted to discussions. Also, on the Discussion page, a blue dot is displayed at the beginning of each new comment to indicate at a glance which comments are new.

Display Discussion Indicators

Cancel

Submit

# Reviewer Selection and Management

New in Release 13.1 - Different Default  
Reviewer Assignment Letters



# Reviewer Invitation/Assignment Letters

- Only one default letter per Reviewer Role for each of the following events:
  - Reviewer Invited
  - Reviewer Assigned (Not Invited)
  - Reviewer Agree
  - Promote Alternate Reviewers
- The same default letter is used for Initial Submissions and Revisions

ActionManager – Prior to 13.1, configuring the default letters for a Reviewer role

## Reviewer Assigned

Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	Reviewer Invited
Reviewer Assigned (Not Invited)	Reviewer Assigned
Reviewer Agree	Reviewer Agrees - Instructions and Due C
Reviewer Decline	Reviewer - Decline Thank you Letter
Review Due Date Changed	NONE
Un-invite Reviewers Before Agreeing to Review	Reviewer Uninvited Notice
Un-assign Reviewers After Agreeing to Review	Reviewer Uninvited Notice
Promote Alternate Reviewers	NONE
Re-open Review	Reviewer's Review re-opened by Editor
Review Assignment Completed	Reviewer Thank You
Required Reviews Complete	NONE
Required Reviews Reset	NONE

# Sending Letters to Reviewers

Sometimes you wish you could easily set different default letters for Reviewers of assignments based on whether a submission is:

- An Initial Submission (Rev 0)
- A revision for which the Reviewer reviewed a previous version
- A revision for which the Reviewer has not reviewed a previous version

ActionManager – Prior to 13.1, configuring the default letters for a Reviewer role

## Reviewer Assigned

Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	Reviewer Invited
Reviewer Assigned (Not Invited)	Reviewer Assigned
Reviewer Agree	Reviewer Agrees - Instructions and Due C
Reviewer Decline	Reviewer - Decline Thank you Letter
Review Due Date Changed	NONE
Un-invite Reviewers Before Agreeing to Review	Reviewer Uninvited Notice
Un-assign Reviewers After Agreeing to Review	Reviewer Uninvited Notice
Promote Alternate Reviewers	NONE
Re-open Review	Reviewer's Review re-opened by Editor
Review Assignment Completed	Reviewer Thank You
Required Reviews Complete	NONE
Required Reviews Reset	NONE



# In 13.1 - Multiple Default Letters

You can now specify up to 3 different default letters for the 4 Invite/Assign Reviewer events:

- An Initial Submission (Rev 0)
- A revision for which the Reviewer reviewed a previous version
- A revision for which the Reviewer has not reviewed a previous version

ActionManager – New in 13.1, configuring the default letters for a Reviewer role

Reviewer Assigned

Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	<i>Original Submission:</i> Reviewer Invited - Rev 0 <i>Revision - Re-Invite:</i> Reviewer Invited - Revision - Previous Reviewer <i>Revision - First Invite:</i> Reviewer Invited - Revision - New Reviewer <a href="#">Select Letters</a>
Reviewer Assigned (Not Invited)	<i>Original Submission:</i> Reviewer Assigned - Rev 0 <i>Revision - Re-Invite:</i> Reviewer Assigned - Any Revision <i>Revision - First Invite:</i> Reviewer Assigned - Any Revision <a href="#">Select Letters</a>
Reviewer Agree	<i>Original Submission:</i> Reviewer Instructions and Due Date <i>Revision - Re-Invite:</i> Reviewer Instructions and Due Date - Revisions <i>Revision - First Invite:</i> Reviewer Instructions and Due Date - Revisions <a href="#">Select Letters</a>
Reviewer Decline	Reviewer - Decline Thank you Letter
Review Due Date Changed	NONE
Un-invite Reviewers Before Agreeing to Review	Reviewer Uninvited Notice
Un-assign Reviewers After Agreeing to Review	Reviewer Uninvited Notice
Promote Alternate Reviewers	<i>Original Submission:</i> Reviewer Invited - Rev 0 <i>Revision - Re-Invite:</i> Reviewer Invited - Revision - Previous Reviewer <i>Revision - First Invite:</i> Reviewer Invited - Revision - New Reviewer <a href="#">Select Letters</a>

# Select Letters

In ActionManager, go to the Reviewer role you want and click the 'Select Letters' link for a Reviewer Assignment event:

- Select a different letter for one or more of the three contexts

Reviewer Invited	<i>Original Submission:</i>	Reviewer Invited - Rev 0
	<i>Revision - Re-Invite:</i>	Reviewer Invited - Revision - Previous Reviewer
	<i>Revision - First Invite:</i>	Reviewer Invited - Revision - New Reviewer
		<a href="#">Select Letters</a>



### Select Letters

You may select a different default letter from the Reviewer Invitation letter family for each of the following cases:

Original Submission:

Revision - Re-Invite (Reviewer has reviewed a previous version):

Revision - First Invite (Reviewer has **not** reviewed a previous version):

# Edit Letters

Check PolicyManager *Edit Letters* to see which letters are associated with which Reviewer roles/ActionManager events (existing functionality)

**Edit Letters**

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

[Back to PolicyManager](#)

[Add New Letter](#) [Save Changes](#) [Edit Image Files for Letters](#)

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		All Formats
			Text	Rich Text (HTML)	
Reviewer Invited	Reviewer Invitation	<a href="#">Everything Reviewer - Reviewer Invited</a> <a href="#">Everything Reviewer - Promote Alternate Reviewers</a>	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
Reviewer Invited - Rev 0	Reviewer Invitation	<a href="#">Reviewer - Reviewer Invited</a>	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
Reviewer Invited - Revision - New Reviewer	Reviewer Invitation	<a href="#">Reviewer - Reviewer Invited</a>	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
Reviewer Invited - Revision - Previous Reviewer	Reviewer Invitation	<a href="#">Reviewer - Reviewer Invited</a>	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide








# Assign Reviewer for Initial Submission

In this example, the default Reviewer letter for assignment is one meant for Reviewers who will be reviewing an initial submission.

**Select Reviewers - Confirm Selection and Customize Letters**  
**Submission JANETDEV140-D-17-00012**  
**Maney M. Alexander, xyz PhD**  
**"Lagrangian Mechanics versus Newtonian Mechanics"**

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

**Reviewers to Assign**

Name	Letter	Due Date	Do Not Assign
Ginger Rabelais    (Reviewer)	Reviewer Assigned - Rev 0  <a href="#">Customize</a>	05/02/2017  (mm/dd/yyyy)	<input type="checkbox"/>

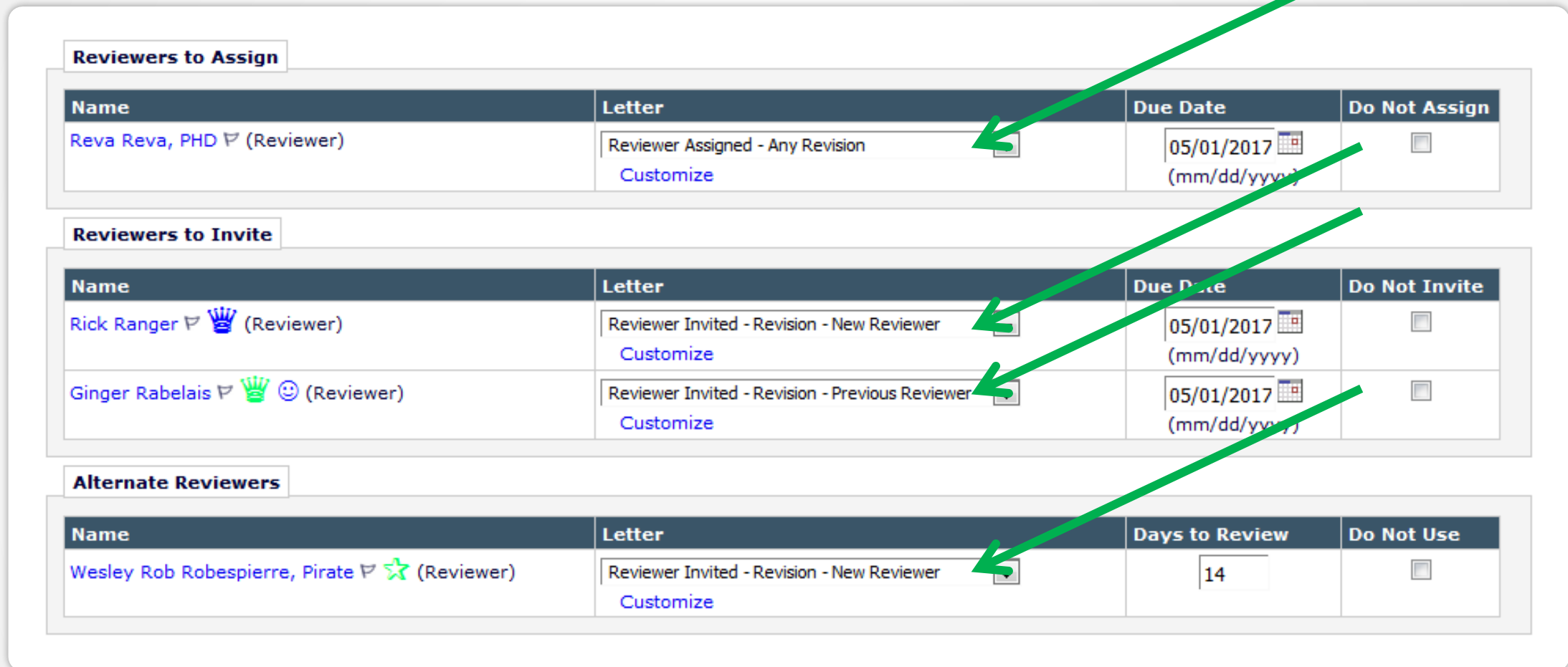
Change Selections

Cancel

Confirm Selections and Proceed

# Assign/Invite Reviewer on Revision

In this example, Reviewers are being selected for a revised submission. The default Reviewer letters are for those configured for revisions.



The screenshot displays three sections for selecting reviewers: "Reviewers to Assign", "Reviewers to Invite", and "Alternate Reviewers". Each section contains a table with columns for Name, Letter, Due Date, and a checkbox for "Do Not Assign" or "Do Not Invite". Green arrows point to the "Letter" dropdown menus in each row.

Reviewers to Assign			
Name	Letter	Due Date	Do Not Assign
Reva Reva, PHD (Reviewer)	Reviewer Assigned - Any Revision <a href="#">Customize</a>	05/01/2017 (mm/dd/yyyy)	<input type="checkbox"/>

Reviewers to Invite			
Name	Letter	Due Date	Do Not Invite
Rick Ranger (Reviewer)	Reviewer Invited - Revision - New Reviewer <a href="#">Customize</a>	05/01/2017 (mm/dd/yyyy)	<input type="checkbox"/>
Ginger Rabelais (Reviewer)	Reviewer Invited - Revision - Previous Reviewer <a href="#">Customize</a>	05/01/2017 (mm/dd/yyyy)	<input type="checkbox"/>

Alternate Reviewers			
Name	Letter	Days to Review	Do Not Use
Wesley Rob Robespierre, Pirate (Reviewer)	Reviewer Invited - Revision - New Reviewer <a href="#">Customize</a>	14	<input type="checkbox"/>

# Reviewer Selection and Management

New in Release 14.0 -  
Usability Improvements



# Reviewer Selection Summary

- Up/down arrows to reorder Alternates
- Text action links to Link, Promote and Remove
- Proposed Reviewers could not be ranked

## Reviewer Selection Summary – Version 13.1

Return to New Editor Assignments  
Return to Main Menu

**View Submission Information**  
Manuscript Details ▾  
Classifications  
View Submission

**Quick Action Links**  
Submit Editor's Decision and Comments  
Send E-mail  
Register and Select New Reviewer  
Search Similar Articles in MEDLINE

**Set Preferences**  
My Suggest Reviewer Preferences  
My Reviewer Display Preferences

**Selected Reviewers**

Invited Reviewers and Linked Alternate Reviewers		
Jason Calhoun (Reviewer) ▾	Agreed to Review 2017-06-14T11:33:15:227	<a href="#">Un-assign</a>
Lone Ranger (Reviewer) ▾	Agreed to Review 2017-06-14T11:33:15:243	<a href="#">Un-assign</a>
Miguel Cabanela (Reviewer) ▾	Reviewer Invited 2017-06-14T11:33:16:397	<a href="#">Un-invite</a>
Timothy E. Radomisli (Reviewer) ▾	Reviewer Invited 2017-06-14T11:33:16:413	<a href="#">Un-invite</a>

**Alternate Reviewers**

↓ Robert M. Campbell (Reviewer) ▾	<a href="#">Link Promote</a>	<a href="#">Remove</a>
↓ ↑ John C. Cameron (Reviewer) ▾	<a href="#">Link Promote</a>	<a href="#">Remove</a>
↑ Matthew Lee Ramsey (Reviewer) ▾	<a href="#">Link Promote</a>	<a href="#">Remove</a>

[Alternate Reviewer Invitation Letters](#)

Alternate Reviewers must be promoted manually. ([more...](#))

**Proposed Reviewers**

Name	Proposed By	Date Proposed	Notes	Invite	Alternate	
S. Terry Canale (Reviewer) ▾	Ed P Garcia	2017-06-14T11:33:16:443		<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
William Capello (Reviewer) ▾	Ed P Garcia	2017-06-14T11:33:16:440		<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
E. Anthony Rankin (Reviewer) ▾	Ed P Garcia	2017-06-14T11:33:16:443		<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>

[Select](#)

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



# In 14.0!

- 'Grip' tool to dynamically (drag & drop) reorder Alternate and Proposed Reviewers
- Graphic icons to Link, Promote and Remove
- Consistent, simple user interface for Editors
- New 'Display Proposed Reviewer Flag'
- No configuration required!

[Return to New Editor Assignments](#)

[Return to Main Menu](#)

**View Submission Information**

[Manuscript Details](#)

[Classifications](#)

[View Submission](#)

[Author's Reviewer Preferences](#)

**Quick Action Links**

[Submit Editor's Decision and Comments](#)

[Send E-mail](#)

[Register and Select New Reviewer](#)

[Search Similar Articles in MEDLINE](#)

**Set Preferences**

[My Suggest Reviewer Preferences](#)










[My Reviewer Display Preferences](#)

## Selected Reviewers

### Invited Reviewers and Linked Alternate Reviewers

Jason Calhoun (Reviewer) ▾	Agreed to Review 06/14/2017	<a href="#">Un-assign</a>
Lone Ranger (Reviewer) ▾	Agreed to Review 06/14/2017	<a href="#">Un-assign</a>
Miguel Cabanela (Reviewer) ▾	Reviewer Invited 06/14/2017	<a href="#">Un-invite</a>
Timothy E. Radomisli (Reviewer) ▾	Reviewer Invited 06/14/2017	<a href="#">Un-invite</a>

### Alternate Reviewers







   Robert M. Campbell (Reviewer) ▾
   John C. Cameron (Reviewer) ▾
   Matthew Lee Ramsey (Reviewer) ▾

[Alternate Reviewer Invitation Letters](#)

Alternate Reviewers will be promoted automatically. (more...)

## Proposed Reviewers

Display Proposed Reviewer Flag ▾

Name	Proposed By	Date Proposed	Notes	Invite	Alternate
  William Capello (Reviewer) ▾	Ed P Garcia	06/14/2017		<input type="checkbox"/>	<input type="checkbox"/>
  S. Terry Canale (Reviewer) ▾	Ed P Garcia	06/14/2017		<input type="checkbox"/>	<input type="checkbox"/>
  E. Anthony Rankin (Reviewer) ▾	Ed P Garcia	06/14/2017		<input type="checkbox"/>	<input type="checkbox"/>

Select



# In 14.0! Proposed Reviewer Flag

- New Proposed Reviewer Flag displayed in folders
- Also added to Search Submissions – search criteria

### Search submissions selection criteria

Display search results in PowerGrid

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

Search Definition:

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

(	Criterion	Is/Is not	Selector	Value	)
	Proposed Reviewer Flag	is	Equal To	True	

Quicklinks

### Search Submissions - Search Results

Proposed Reviewer Flag is equal to 'True'

Page: 1 of 1 (3 total submissions)

Action	Manuscript Number	Article Type	Current Status	Article Title	Status Date	Initial Date Submitted	Author Name	Reviewers	Ha
View Submission Details ▾ Initiate Discussion History Technical Information File Inventory Edit Submission Solicit Commentary Classifications Unassign Editor Notify Editor Invite Reviewers ▶ Set Final Disposition Initiate Production Similar Articles in MEDLINE Author Mapper (Last First Middle) Submit Editor's Decision and Comm Send E-mail Linked Submissions	STACEYDEV130-D-15-00016	Clinical	Received by Editor	A Very Important Research Article	06/14/2017	04/21/2017	Stacey J Lavelle ▾ 	Miguel Cabanela, M.D. * ▾ Jason Calhoun, M.D. * ▾ Timothy E. Radomski, M.D. * ▾ Lone Ranger * ▾	Ed

### Action

- Initiate Discussion
- History
- Technical Information
- File Inventory
- Edit Submission
- Solicit Commentary
- Classifications
- Unassign Editor
- Notify Editor
- Invite Reviewers
- Set Final Disposition
- Initiate Production
- Similar Articles in MEDLINE
- Author Mapper (Last First Middle)
- Submit Editor's Decision and Comn

# Reviewer Selection and Management

New in Release 13.1 – Alternate  
Reviewer Promotion Enhancement



# Alternate Reviewer Promotion Restricted to Same Role

- Alternates may be promoted when a primary Reviewer is un-invited, un-assigned or declines the invitation
- The system first promotes any linked Alternate Reviewers; if there are none, then it will look to the general pool of (non-linked) Alternates
- But, non-linked Alternates must have the same Reviewer Role as the person they are 'replacing'


Pre-13.1: Alternate must be linked or same role

**Reviewer Selection Summary - Submission**  
**STACEYTEST50-D-06-00007**

Ed P Garcia, M.D.  
My Very Important Article

**Reviewer Search**



Search My Publication  from

Reviewer Discovery from  ProQuest Community of Scholars








**Review Settings**

**Selected Reviewers**

**Invited Reviewers and Linked Alternate Reviewers**

Brad James Richmond (Reviewer) 	Reviewer Invited 2017-06-14T07:41:45:940	<a href="#">Un-invite</a>
Robin R. Richards (Reviewer) 	Reviewer Invited 2017-06-14T07:41:45:907	<a href="#">Un-invite</a>
Amy R. Burke (Biostat Reviewer)	Linked Alternate	<a href="#">Un-Link</a>

**Alternate Reviewers**

 David Lee Roth (Biostat Reviewer) 	<a href="#">Link Promote</a>	<a href="#">Remove</a>
  Meg Ryan (Reviewer) 	<a href="#">Link Promote</a>	<a href="#">Remove</a>
 Geraldo Rivera (Reviewer) 	<a href="#">Link Promote</a>	<a href="#">Remove</a>

[Alternate Reviewer Invitation Letters](#)

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

**Proposed Reviewers**





# In 13.1 - Alternate Rank Order Determines Order of Promotion

- The first ranked Biostat Reviewer (Roth) will be promoted when Richmond declines or is un-invited

**Reviewer Selection Summary - Submission STACEYTEST50-D-06-00007**  
Ed P Garcia, M.D.  
My Very Important Article

**Reviewer Search**

Search My Publication    Search for Reviewers    from All Reviewers   

**Review Settings**

**Selected Reviewers**

**Invited Reviewers and Linked Alternate Reviewers**

Brad James Richmond (Reviewer)	Reviewer Invited 06/15/2017	<a href="#">Un-invite</a>
Robin R. Richards (Reviewer)	Reviewer Invited 06/15/2017	<a href="#">Un-invite</a>
Amy R. Burke (Biostat Reviewer)	Linked Alternate	

**Alternate Reviewers**

David Lee Roth (Biostat Reviewer)
Meg Ryan (Reviewer)
Geraldo Rivera (Reviewer)



# In 13.1 - Edit Article Type Page

- UNSELECT the checkbox option 'Only Promote unlinked Alternate Reviewers with MATCHING Roles'

Reviewer Parameters:	New and Revised Submissions	
Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.	<input type="text" value="2"/>	<i>Must be 0 or greater.</i>
Number of Days Reviewer has to Respond to Invitation:	<input type="text" value="0"/>	<i>Set this value to zero to turn off the automatic un-invitation process for all Reviewers who have not responded to an invitation.</i>
Automatically Un-assign Reviewers n days after 'Date Review Due'	<input type="text" value="0"/>	<i>Set this value to zero to turn off the automatic un-assign process for all Reviewers who have accepted an invitation but not submitted a review on time.</i>
Automatically Un-assign late Reviewers with partial review saved.	<input type="checkbox"/>	<i>Select this box to automatically un-assign late Reviewers even if they have a partial review saved.</i>
Automatically Promote Alternate Reviewers:	<input checked="" type="checkbox"/>	<i>Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines, is un-invited, or un-assigned.</i>
Only Promote unlinked Alternate Reviewers with MATCHING Roles	<input type="checkbox"/>	<i>Select this box to only Promote unlinked Alternate Reviewers with MATCHING Reviewer Roles.</i>
<input checked="" type="radio"/> Continue promoting Alternates until there are no more Alternates in queue		
<input type="radio"/> Only promote Alternate Reviewers when the combined number of Agreed and Completed Reviews is less than the current value of the Submission's own 'Required Reviews Complete' value		

# Decision Letter Phrase Selector

New in Release 14.0 – Text snippets for  
easy inclusion in decision letters



# Editor Decision Page

- One letter template per decision term
- Editors use different phrasing to convey similar information, but the publication wants a consistent voice conveying editorial decision to Authors

## Pre-14.0: Editor Form

Editor-in-Chief Decision and Comments for Manuscript Number STACEYTEST60-D-07-00009

**A Very Interesting Article**

Original Submission  
Ed P Garcia, M.D. (Editor-in-Chief)

Decision: C-Reject Overall Editor Manuscript Rating (1-100):

[Cancel](#) [Save & Submit Later](#) [Proof & Print](#) [Proceed](#)

[Details](#) [History](#) [Similar Articles in MEDLINE](#) [Attachments \(0\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Manuscript Rating Card](#) [Send E-mail](#)

Original Submission	
Hermione Grainger (Reviewer 1)	C+
Ed P Garcia, M.D. (Editor-in-Chief)	Partial Decision Saved
Author Decision Letter	
Raj D Rao (Author)	

If the decision is Revise, the author has  days to revise this submission.

[Editor Instructions](#)

**Confidential Comments to Editor**

[Insert Special Character](#) [Open in New Window](#)



## In 14.0 - Pool of phrases to choose from when drafting/sending decision letters

- Publication defines a pool of phrases (text snippets) for use in decision letters
- Editors can select from a list of phrases to construct decision letters more efficiently and with fewer errors
- Phrases selected by any Editor in the chain will populate a new %EDITOR\_DECISION\_PHRASES% merge field when the Decision Letter is generated
- When the merge field is populated, the phrases appear in the letter as separate paragraphs so that they can be edited prior to notifying the Author

# Editor selects desired phrases on Decision page

**Managing Editor Decision and Comments for Manuscript Number SALLYTEST90-D-11-00023R1**

**A Very Important Research Article**

Revision Number 1  
Sally Editor, PhD (Managing Editor)

Decision:  Overall Editor Manuscript Rating (1-100):

[Details](#) [History](#) [Similar Articles in MEDLINE](#) [Attachments \(3\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Manuscript Rating Card](#)  
[View Review Question Responses](#) [Send E-mail](#)

	Revision 1	Original Submission
Richard Feynman, PhD	(None)	[Terminated by Managing Editor]
Neils Bohr (Reviewer 3)	(None)	Major Revision
Robert Heinlein (Reviewer 4)	Minor Revision	Minor Revision
Sally Editor, PhD (Managing Editor)	Assigned - No Decision	Revise
Author Decision Letter		Revise
Ann Author (Author)		

If the decision is Revise, the author has  days to revise this submission.

**Editor Decision Phrases**

Editor Decision Phrases available for inclusion in the Decision Letter are displayed below. Select the phrases you wish to include.

**Select Phrase**

- Editor Decision Phrases can use HTML tags to display text in color, e.g. **red**. Phrases can also include [hyperlinks](#).
- Thank you for submitting your manuscript, "%ARTICLE\_TITLE%", to [The Journal](#).
- We appreciate the opportunity to review your manuscript and hope that you will continue to submit material for our consideration.

**Confidential Comments to Editor**

# Selected phrases pulled into decision letter via new %EDITOR\_DECISION\_PHRASES% merge field

## Notify Author

**Manuscript Number:**  
SALLYTEST90-D-11-00023R1

**Title:** A Very Important  
Research Article

To finalize your decision and notify the author, use the 'Send Now' button.

If you wish to submit your decision to the next editor for review before the author is notified, use the 'Submit Decision without Notifying Author' button.

Editor Decision:	Reject
Modify Decision:	Reject
From:	"My Journal" <subnoske@ariessc.com>
To:	<a href="#">Ann Author</a>
Letter Purpose:	Editor Decision - Reject
Letter Subject:	Your Submission

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

<input type="checkbox"/>	<input type="checkbox"/>	cc:	bcc:
Editors Assigned to Manuscript			
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Sally Editor (Managing Editor)</a>	
<input type="checkbox"/>	<input type="checkbox"/>	cc:	
<input type="checkbox"/>	<input type="checkbox"/>	bcc:	

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

Ref.: Ms. No. SALLYTEST90-D-11-00023R1  
A Very Important Research Article  
Sally's 14.0 Testweb Site

Dear %TITLE% %LAST\_NAME%,

Reviewers' comments on your work have now been received. You will see that they are advising against publication of your work. Therefore I must reject it.

For your guidance, I append the reviewers' comments below.

Thank you for submitting your manuscript, "A Very Important Research Article," to <a href="http://www.ariessys.com">The Journal</a>.

We appreciate the opportunity to review your manuscript and hope that you will continue to submit material for our consideration.

Thank you for giving us the opportunity to consider your work.

# Decision Phrase Configuration

## Step 1: Define phrases

### PolicyManager Main Menu

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

- ⊕ Registration and Login Policies
- ⊕ Status Policies
- ⊕ Submission Policies
- ⊕ Questionnaire Policies
- ⊕ Additional Data Policies
- ⊕ Editor Assignment Policies
- ⊕ Suggest Editor Policies
- ⊕ Reviewer and Editor Form Policies

#### Manuscript Rating Question Configuration

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

#### Reviewer Recommendation Policies

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

#### Editor Decision Policies

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











### Configure Editor Decision Phrases

Listed below are the Editor Decision Phrases which, when associated with an Editor Form, can be selected by an Editor when submitting a decision and added to the Decision Letter. To edit a phrase use the Edit icon. A phrase may be removed at any time using the Discard icon. To add a new phrase, click 'Add Editor Decision Phrase'.

#### Current Editor Decision Phrase List

[+ Add Editor Decision Phrase](#)

 	Editor Decision Phrases can use HTML tags to display text in color, e.g. <b>red</b> . Phrases can also include <a href="#">hyperlinks</a> .
 	Thank you for submitting your manuscript, "%ARTICLE_TITLE%", to <a href="#">The Journal</a> .
 	We appreciate the opportunity to review your manuscript and hope that you will continue to submit material for our consideration.
 	While we are unable to publish your manuscript at this time, we encourage you to resubmit at a later date.

[+ Add Editor Decision Phrase](#)

[Create Editor Forms](#)

[Match Editor Forms to Article Types and Editor Roles](#)

[Return to PolicyManager](#)



# Decision Phrase Configuration

## Step 2: Add phrases to Editor Form on Add/Edit Editor Form page

**PolicyManager Main Menu**

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

- Registration and Login Policies
- Status Policies
- Submission Policies
- Questionnaire Policies
- Additional Data Policies
- Editor Assignment Policies
- Suggest Editor Policies
- Reviewer and Editor Form Policies
  - Manuscript Rating Question Configuration**
    - [Edit Manuscript Rating Questions](#)
    - [Overall Manuscript Rating Question Settings](#)
    - [Edit Manuscript Rating Instructions](#)
  - Reviewer Recommendation Policies**
    - [Edit Reviewer Recommendation Terms](#)
    - [Create/Edit Custom Review Questions](#)
    - [Create/Edit Review Forms](#)
    - [Match Review Forms to Article Types and Reviewer Roles](#)
    - [Set Pending Assignments Deep Link Expiration](#)
    - [Set Reviewer Recommendation Deep Link Expiration](#)
  - Editor Decision Policies**
    - [Edit Editor Decision Terms](#)
    - [Configure Editor Decision Phrases](#)
    - [Create Editor Forms](#)
    - [Configure Editor Forms](#)
    - [Editor Manuscript Rating Question Configuration](#)
    - [Configure Options for Review Rating](#)
    - [Configure Automatic Withdrawal of Declined Revisions](#)

**Current Editor Decision Phrase List** [+ Add Editor Decision Phrase](#)

No Editor Decision Phrases have been added to this Editor Form

[+ Add Editor Decision Phrase](#)

Display Custom Review Questions and Responses Grid

**Order**


1	'Confidential Comments to Editor/Author' textboxes
2	Manuscript Rating Questions (when displayed)
3	Custom Review Questions and Responses (when displayed)
4	Editor Decision Phrases (when displayed)

[Update Order](#)

[Cancel](#) [Submit](#)

[Configure Editor Decision Phrases](#)

**Select Editor Decision Phrase(s)**

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

- Editor Decision Phrases can use HTML tags to display text in color, e.g. **red**. Phrases can also include [hyperlinks](#).
- Thank you for submitting your manuscript, "%ARTICLE\_TITLE%", to [The Journal](#).
- We appreciate the opportunity to review your manuscript and hope that you will continue to submit material for our consideration.
- While we are unable to publish your manuscript at this time, we encourage you to resubmit at a later date.

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

# Decision Phrase Configuration

## Step 3: Associate Editor Form with Editor Role/Article Type

**PolicyManager Main Menu**

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

- Registration and Login Policies
- Status Policies
- Submission Policies
- Questionnaire Policies
- Additional Data Policies
- Editor Assignment Policies
- Suggest Editor Policies
- Reviewer and Editor Form Policies

**Manuscript Rating Question Configuration**

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

**Reviewer Recommendation Policies**

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

**Editor Decision Policies**

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

### Editor Form Configuration

In the grid below, please specify the Editor Form used for each Article Type / Editor Role combination. The Editor Form selected indicates the Editor Instructions and pre-populated form in the "Editor Confidential Comments to Editor" box that Editors see on the Submit Editor Decision page.

Editor Role / Article Type	Managing Editor	Section Editor	Editor in Chief	Conference Editor	Special Issue Editor	Editorial Assistant	Associate Editor
Original Study	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	Default Editor Form ▾	Default Editor Form ▾
APC Optional (this is a really long Article Type Name for testing purposes)	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	Default Editor Form ▾	Default Editor Form ▾
APC Required	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	Default Editor Form ▾	Default Editor Form ▾
Original Study with Waiver Request Step	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	New Editor Form ▾	Default Editor Form ▾	Default Editor Form ▾

# Decision Phrase Configuration

## Step 4: Edit Decision Letter to include new %EDITOR\_DECISION\_PHRASES%

### PolicyManager Main Menu

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

- Registration and Login Policies
- Status Policies
- Submission Policies
- Questionnaire Policies
- Additional Data Policies
- Editor Assignment Policies
- Suggest Editor Policies
- Reviewer and Editor Form Policies
- E-mail and Letter Policies
  - Edit Letters**
  - Define Custom Merge Fields
  - Set "Email From" Address
  - Manage Preferred Method of Contact Settings
  - Configure Waiver Request
  - Configure Email Import
  - Set Notify Author Blinding Policy
  - Set Notify Editor Preference

- General Policies
- Discussion Forums
- Linked Submissions Policies
- Conference Submission Policies
- Transmittal Policies
- Production Manager

- Corresponding Editor
- Corresponding Production Editor

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

cc:

bcc:

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

- cc: bcc:
- Display checkbox for co-Authors

Letter Body:

%TODAYS\_DATE%

Dear %TITLE% %LAST\_NAME%:

Your manuscript entitled, "%ARTICLE\_TITLE%," number %MS\_NUMBER%, has been reviewed and our Consultant Reviewers did have questions and concerns that need to be addressed before further processing of your manuscript. However,

%EDITOR\_DECISION\_PHRASES%

Click here to see what the Reviewer had to say:  
%ATTACH\_FOR\_REVIEWER\_DEEP\_LINK%

Review Questions and Responses (REVIEW\_QUESTIONS\_AND\_RESPONSES merge field)  
%REVIEW\_QUESTIONS\_AND\_RESPONSES%

Reviewer's Blind Comments to Author (COMMENTS\_TO\_AUTHOR merge field)  
%COMMENTS\_TO\_AUTHOR%

Insert System Merge Fields

You can drag and drop merge fields from here to the letter Subject or Body. (more...)

Q %EDITOR\_ Expand All | Collapse All

- %EDITOR\_ASSIGNMENT\_FOLDER\_SUMMARY%
- %EDITOR\_ASSIGNMENT\_SUBMISSION\_LISTS%
- %EDITOR\_DECISION%
- %EDITOR\_DECISION\_PHRASES%
- %EDITOR\_DEEP\_LINK%
- %EDITOR\_MAIN\_MENU\_DEEP\_LINK%

# Visual Cues for Editors (Editor Signposting)



Q: What is that pretty colored bar?

A: It's an Editor **warning status signpost!**

# Editor Main Menu

- Prior to 14.0, Editors can see how many submissions are in each folder on their Editor 'To-Do' List
- But the count, e.g. "(10)", after each folder name doesn't tell them how long submissions have been in that folder

## Editor 'To-Do' List



My Pending Assignments (181)

- Editorial Submissions in Progress (10)
- Transferred Submissions (9)
- New Submissions (23)
- Revised Submissions (1)
- New Submissions Requiring Assignment (8)
- Revised Submissions Requiring Assignment (2)
- Direct-to-Editor Revised Submissions (3)
- Submissions Needing Approval by Editor (7)
- Submissions Sent Back to Author for Approval (8)
- Incomplete Submissions (54)
- New Invitations (2)
- New Assignments (1)
- Editors Invited - None Yet Assigned (4)
- Submissions with Rescinded Decision (2)
- Submissions with Required Reviews Complete (1)
- Submissions Requiring Additional Reviewers (1)
- Submissions with One or More Late Reviews (1)
- Submissions with Active Discussions (60)

Reviews in Progress (1)

- Reviewers Invited - No Response (0)
- Submissions Under Review (1)

**NEW**

# In 14.0 - Signposts!



- As of 14.0, signposts (like traffic-lights) help an Editor prioritize their current workload at a glance
- The colors indicate how many submissions in that folder are:
  - **Green** - On schedule
  - **Amber** - Need attention
  - **Red** – Late
- 25 folders can display signposts

## Editor 'To-Do' List

### My Pending Assignments (63)

-  Editorial Submissions in Progress (2)
-  Transferred Submissions (23)
-  New Submissions (9)
-  Revised Submissions (2)
-  New Submissions Requiring Assignment (3)
-  Revised Submissions Requiring Assignment (1)
-  Direct-to-Editor New Submissions (1)
-  Submissions Needing Approval by Editor (2)
-  Submissions Sent Back to Author for Approval (3)
-  Incomplete Submissions (13)
- New Invitations (0)
-  New Assignments (1)
-  Submissions with Rescinded Decision (1)
-  Submissions with Required Reviews Complete (2)
- Submissions Requiring Additional Reviewers (0)
-  Submissions with One or More Late Reviews (1)
- Submissions with Active Discussions (3)

### Reviews in Progress (2)

-  Reviewers Invited - No Response (1)
-  Submissions Under Review (1)

# Warning Thresholds

- The publication sets the warning thresholds in PolicyManager
  - Each folder has its own thresholds
- If a submission has been in the folder for fewer than the *Needs Attention* value, the submission is **green**
- If it has been in the folder for more than *Late* days, it is **red**
- Otherwise, it is **amber**

## Configure Warning Thresholds

These warning thresholds are used to determine whether individual submissions in a folder "Need Attention" or are considered "Late" based on how long they have been in the folder. ([more...](#))

Cancel

Submit

### Editorial Submissions in Progress

**Needs Attention:**  Days since submission began

**Late:**  Days since submission began

### Transferred Submissions

**Needs Attention:**  Days since initial date submitted

**Late:**  Days since initial date submitted

### New Submissions

**Needs Attention:**  Days since initial date submitted

**Late:**  Days since initial date submitted

### Revised Submissions

# Editor RoleManager

- To view the signposts, the permission *View Warning Status Signposts* must be selected for the Editor role

- 
- View All Submissions
  - View Completed Reviews Grid in Main Menu
  - View Warning Status Signposts
  - View Additional Manuscript Details



# Signposts in Folders








- In a folder, each submission is color-coded to indicate its warning status (i.e. how long it has been in the folder)
- You can sort on the column

Quicklinks Collapse

**New Submissions - mary mary**

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

Page: 1 of 1 (8 total submissions) 1 25 results per page. ⚙️

Action	Manuscript Number	Article Type	Section Category	Article Title
 <a href="#">Action Links</a>	ALENADEV140-D-17-00015	Special Issue Article		test
 <a href="#">Action Links</a>	ALENADEV140-D-17-00013	Original Study		less/fewer agaaain
 <a href="#">Action Links</a>	ALENADEV140-D-17-00012	Original Study	Basic Science Section	Application of a Nestec a Competing Duration Transaction Decision M
 <a href="#">Action Links</a>	ALENADEV140-D-17-00005	Original Study	Basic Science Section	Application of a Nestec a Competing Duration Transaction Decision M
 <a href="#">Action Links</a>	ALENADEV140-D-17-00002	Original Study		Funder test
 <a href="#">Action Links</a>	ALENADEV131-D-16-00070	Co-Author Questionnaire enabled (verify on new submission)	Basic Science Section	30757 Brenda
 <a href="#">Action Links</a>	ALENADEV131-D-16-00063	Original Study		co-author register/veri
 <a href="#">Action Links</a>	ALENADEV131-D-16-00064	Original Study	Basic Science Section	co-auth

# Automated Editor Summary Reminders

New in Release 14.0 – Signposts and  
more robust configuration options



# Editor Summary Reminder Reports

- Up to Release 14.0, Editors can automatically receive a reminder email based on the simple model:
  - “Every X days, send an Editor a copy of their To-Do List”
- The email summarizes the submissions in three key folders:
  - *New Invitations*
  - *New Assignments*
  - *Required Reviews Complete*
- Configured in PolicyManager, per Editor role.
- 4 merge fields per folder are available to pull information into the email
- Criteria can limit the number of submissions pulled in, e.g. “pull in only Editors who received an invitation X number of days ago”

# *New and Improved*

## Editor Summary Reminder Reports

- Release 14.0 revamped these reports!
  - Color-coding with signposts in HTML letters
  - For up to 11 folders
  - A single merge field pulls information from all the selected folders
  - 2 merge fields are available:
    - To summarize by folder
    - To list submissions by folder
  - Criteria is based on the same 'Warning Thresholds' as the Editor signposts on the Main Menu
  - Deep-linking merge fields to folders can be included














# Folder Summary

- Sample HTML email created with the new folder summary merge field:
  - %EDITOR\_REMINDER\_FOLDER\_SUMMARY%
- Folder names can be deep links

Dear Sam,

Here's a summary of various folders from your Editor Main Menu. Folders marked with red or amber require attention.

## *Folder Summary as of March 3, 2017*

	<a href="#">New Invitations</a> (2)
	<a href="#">New Assignments</a> (1)
	<a href="#">Submissions with Rescinded Decision</a> (1)
	<a href="#">Submissions with Required Reviews Complete</a> (7)
	<a href="#">Submissions Requiring Additional Reviewers</a> (4)
	<a href="#">Submissions with One or More Late Reviews</a> (2)
	<a href="#">Reviewers Invited - No Response</a> (11)
	<a href="#">Submissions Under Review</a> (14)
	<a href="#">Group by Editors I Assigned</a> (2)
	<a href="#">Group by Editors with Current Responsibility</a> (2)
	<a href="#">Group by Manuscript Status</a> (2)

You may click this link to log in and go to your Editor Main Menu:  
[Editor Main Menu](#)

Regards,  
ACME Journal

# Submission Lists

- Sample HTML email created with the new submission lists merge field:
  - %EDITOR\_REMINDER\_SUBMISSION\_LISTS%
- Folder names can be deep links
- Submissions are outlined with their warning status signpost color

Dear Sam,

Here are lists of submissions from various folders in your Editor Main Menu. Submissions marked with red or amber need attention.

*Submission Lists as of March 3, 2016*

## New Invitations (2)

Submission	Submitted # Days Ago	Status (# Days)	Editor Name	Accept/Decline
JANETDEV122-D-15-00037	submitted 22 days ago	Editor Invited (19 days)	Sam Jones, PhD	<a href="#">Accept Editor Invitation</a> <a href="#">Decline Editor Invitation</a>
<b>Title:</b> Critical Cervical Involvement of Endoplasmic Reticulum Associated with Diagnosis in Patients with a Prodrome of a Homogenous Population Genetic Structure of the Bright Red Fluorescent Protein in Cave-Inhabiting Fauna with Transcranial Magnetic Stimulation <b>Authors:</b> Frank Oliver Glockner, PhD, ACME Institute for Microbiology; Wolfgang Hankeln, PhD, ACME Institute for Microbiology; Jost Waldmann, PhD; ACME Institute for Microbiology <b>Abstract:</b> This study assesses the biogeographic classification of the Western Indian Ocean (WIO) on the basis of the species diversity and distribution of reef-building corals. Twenty one locations were sampled between 2002 and 2011. Presence/absence of scleractinian corals was noted on SCUBA, with the aid of underwater digital photographs and reference publications for species identification. Sampling effort varied from 7 to 37 samples per location, with from 15 to 45 minutes per dive allocated to...				
JANETDEV122-D-15-00071	submitted 2 days ago	Editor Invited (1 day)	Sam Jones, PhD	<a href="#">Accept Editor Invitation</a> <a href="#">Decline Editor Invitation</a>
<b>Title:</b> Bright Red Fluorescent Protein in Cave-Inhabiting Fauna with Transcranial Magnetic Stimulation <b>Authors:</b> Julia Sylvan, Phd, University of Edinburgh <b>Abstract:</b> This is the abstract, for which up to 75 words will be displayed, followed by an ellipsis, if it is longer than 75 words.				

## New Assignments (1)

Submission	Submitted # Days Ago	Status (# days)	Editor Decision
JANETDEV122-D-15-00071R1	submitted 7 days ago	Received by Editor (3 days)	Revise
<b>Title:</b> Secret Formulas for Soda Flavors <b>Authors:</b> June Hemmick <b>Abstract:</b> This is the abstract, for which up to 75 words will be displayed, followed by an ellipsis, if it is longer than 75 words.			

## Submissions with Rescinded Decision (1)

Submission	Submitted # Days Ago	Status (# days)	Review Status	Editor Decision
JANETDEV122-D-15-00020	submitted 61 days ago	Required Reviews Complete (11 days)	2 Complete # of Req'd Reviews: 2	
<b>Title:</b> Autumn Structures <b>Authors:</b> Amélie Chloe Chevalier, MD, University of Ottawa; Olivier Pine, MD, Universidad de los Andes; François Banacos, MD, Robert Koch Institute; Mercy Bedelia, MD, PhD, Institute of Cytology and Genetics; Yiman Nahabedian, MD, MicroDish BV; Hyan Samosa, MD, Yale University School of Medicine <b>Abstract:</b> This is the abstract, for which up to 75 words will be displayed, followed by an ellipsis, if it is longer than 75 words.				

# New Configuration

- Accordion-style, per Editor role

## Automated Editor Summary Reminders

You can configure automatic reminder emails, like ToDo lists, to be sent to Editors. An Editor will receive one email summarizing the information from the folders you select. [\(more...\)](#)

[Cancel](#) [Submit](#)

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

<b>+ Associate Editor</b>	<input checked="" type="checkbox"/> Send Reminders
<b>+ Editor-in-Chief</b>	<input checked="" type="checkbox"/> Send Reminders
<b>+ Managing Editor</b>	<input type="checkbox"/> Send Reminders

[Cancel](#) [Submit](#)

# Expanded Role

Submissions/folders are pulled into the email based on the warning thresholds:

- ‘Late’ – only if late submissions
- ‘Needs Attention’ – only if submissions need attention or are late
- ‘Always’ - pulls all submissions

**Associate Editor**  Send Reminders

Frequency (Days)\*

Next Reminder Due

Summary Letter\*

Include Author List

Include Abstract

Include Folders\*



	Always	Needs Attention	Late
<input checked="" type="checkbox"/> <i>New Invitations</i>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> <i>New Assignments</i>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> <i>Submissions with Rescinded Decision</i>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> <i>Submissions with Required Reviews Complete</i>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> <i>Submissions Requiring Additional Reviewers</i>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/> <i>Submissions with One or More Late Reviews</i>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/> <i>Reviewers Invited - No Response</i>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> <i>Submissions Under Review</i>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> <i>Group by Editors I Assigned</i>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> <i>Group by Editor with Current Responsibility</i>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> <i>Group by Manuscript Status</i>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>



# Reminders

- Letter can include both merge fields
- 'X' numbers of days are listed instead of dates for easier comprehension at-a-glance
- Review Status info is included

Folder Summary as of April 3, 2017

 [New Invitations](#) (2)  
 [Submissions with Required Reviews Complete](#) (7)

Submission Lists as of April 3, 2017

## [New Invitations](#) (2)

Submission	Submitted # Days Ago	Status (# Days)	Editor Name	Accept/Decline
<b>NOVA122-D-15-00037</b> <b>Title:</b> Endoplasmic Reticulum with Bright Red Fluorescent Protein in Cave-Inhabiting Fauna with Transcranial Magnetic Stimulation <b>Authors:</b> Manuel McDougall, PhD, ACME Institute; Esmerelda Moses, PhD, ACME Institute; Jost Nahabedian, PhD; AJAX Institute	submitted 22 days ago	Editor Invited (19 days)	Sam Jones, PhD	<a href="#">Accept Editor Invitation</a> <a href="#">Decline Editor Invitation</a>
<b>NOVA122-D-15-00071</b> <b>Title:</b> Secret Formulas for Soda Flavors <b>Authors:</b> Julia Sylvan, Phd, University of Edinburgh	submitted 2 days ago	Editor Invited (1 day)	Sam Jones, PhD	<a href="#">Accept Editor Invitation</a> <a href="#">Decline Editor Invitation</a>

## [Submissions with Required Reviews Complete](#) (7)

Submission	Submitted # Days Ago	Status (# days)	Review Status	Editor Decision
<b>NOVA122-D-15-00043</b> <b>Title:</b> The Kobayashi Maru <b>Authors:</b> Chris Pine	submitted 39 days ago	Under Peer Review (3 days)	2 Complete # of Req'd Reviews: 2	
<b>NOVA122-D-15-00026</b> <b>Title:</b> Spring Structures <b>Authors:</b> Jay McGee; Jay North	submitted 61 days ago	Required Reviews Complete (11)	2 Complete 1 Late # of Req'd Reviews: 2	

# All Submissions with Editor Decision Folder

New in Release 14.0 – More Visibility to Author  
Notification Status

# Pre-14.0: All Submissions with Editor's Decision folder

- Folder includes submissions where the Author has and has not yet been notified
- Only indication is the presence of hyperlinked Decision Term (Author has been notified)
- Difficult to see 'at a glance' which submissions require action

Search

### All Submissions with Editor's Decision - Ed P Garcia, M.D.

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

Page: 1 of 2 (30 total submissions) 1 2 ▶▶▶ 25 results per page

Action	Manuscript Number	Article Type	Article Title	Author Name	Status Date	Current Status	Editor Name	Editor Decision
<a href="#">Action Links</a>	JBJS-D-03-01210	Clinical	Long-term costs of cemented versus uncemented femoral fixation of primary total hip arthroplasty	Bernard F. Morrey, M.D.	2017-06-15T07:21:5	Accept	Ed P Garcia, M.D.	Ready
<a href="#">Action Links</a>	STACEYDEV131-D-17-00001	Original Reserach - Chemistry	A Very Important Research Article	Caroline Webber	2017-06-15T07:12:3	Decision In Process	Ed P Garcia, M.D.	C+-Revise



# In 14.0 - All Submissions with Editor's Decision folder

- New sortable 'Author Notified Date' column
- If Author has been notified, the date is shown
- If Author has not been notified, the Notify Author link is shown

Quicklinks

## All Submissions with Editor's Decision - Sally Editor, PhD

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

Page: 1 of 2 (34 total submissions) 1 2 ▶ ▶▶

Action	Manuscript Number	Article Title	Author Name	Current Status	Editor Name	Editor Decision	Author Notified Date
<a href="#">Action Links</a> 🔍 ⚠️	SALLYDEV131-D-16-00102	Super Important Research	Cindy Author 📧	Accept	Chief Editor	Accept	Jul 20 2016 02:26PM
<a href="#">Action Links</a> 🔍 ⚠️	SALLYDEV130-D-16-00099	Wicked Awesome Article	Buzz Lightyear Aldrin, PhD 📧 !	Accept	Sally Editor, PhD	Accept	Notify Author

# Subordinate Editor Folders

Refresher on Three  
Useful Folders



# Subordinate Editor's Pending Assignments

- 3 folders with submissions grouped by:
  - Editors I Assigned
  - Editor with Current Responsibility
  - Manuscript Status






## Editor-In-Chief Main Menu

### Search


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

### Editor 'To-Do' List

My Pending Assignments (107)

-  [New Submissions](#) (20)
-  [Revised Submissions](#) (2)
-  [New Submissions Requiring Assignment](#) (1)
- [Revised Submissions Requiring Assignment](#) (0)
-  [Incomplete Submissions](#) (2)
-  [New Invitations](#) (10)
-  [New Assignments](#) (8)
-  [Editors Invited - None Yet Assigned](#) (8)
-  [Submissions with Rescinded Decision](#) (2)
-  [Submissions with Required Reviews Complete](#) (9)
-  [Submissions Requiring Additional Reviewers](#) (11)
-  [Submissions with One or More Late Reviews](#) (2)
- [Submissions with Active Discussions](#) (45)

Reviews in Progress (27)




-  [Reviewers Invited - No Response](#) (11)
-  [Submissions Under Review](#) (26)

### View All Assigned

[View All Assigned Submissions](#) (113)

[View All Assigned Submissions being Edited](#) (77)

### Subordinate Editor's Pending Assignments (28)

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

# Group By Editors I Assigned

## Subordinate Editor's Pending Assignments - Group By Editors I Assigned

**Contents:** Data are grouped by Editor you assigned. This may not be the Editor who is handling the submission. Use the up/down arrows to change the sort order.

Page: 1 of 3 (201 total submissions)

1 2 3 >> >|

Display 100 results per page.

### Betty Adams

▲▼	⊞ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status	View Decision ▲▼
	<a href="#">Action Links</a>	STACEYTEST82-D-11-00002	Clinical		Super Excellent Article	Jack E. Zigler, M.D.	01/13/2010	02/02/2011	Received by Editor	1 Agreed 1 Invited - No Response (more...)	

### Thomas W. Bauer, M.D., Ph.D.

▲▼	⊞ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status	View Decision ▲▼
	<a href="#">Action Links</a>	warpclone-D-03-01220	Clinical	New Section	Test of Trauma	Henrik Aagaard, M.D., Ph.D.	07/31/2003	07/31/2003	Reviews Completed	3 Complete (more...)	B-Revise
	<a href="#">Action Links</a>	JBJS-D-03-01195	Case Report	New Section	Intraosseous lipoma - a case report	Vesna Janevska, PhD	07/11/2003	07/14/2003	Under Review	1 Complete 1 Agreed 1 Late (more...)	

### Daniel J. Berry, M.D.

▲▼	⊞ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status	View Decision ▲▼
	<a href="#">Action Links</a>	STACEYDEV92-D-12-00005	Clinical		Sage Demo 1 - Queue Already Created	Stacey J Lavelle, MD	06/11/2012	05/13/2013	Received by Editor		
	<a href="#">Action Links</a>	STACEYTEST60-D-07-00006	Research		Test Manuscript with Reference Checking	Raj D Rao, MD	05/14/2007	05/31/2007	Received by Editor		

# Group By Editors with Current Responsibility

## Subordinate Editor's Pending Assignments - Group By Editor with Current Responsibility

**Contents:** Data are grouped by Editor with current responsibility for the manuscript. Use the up/down arrows to change the sort order.

Page: 1 of 4 (191 total submissions)

1 2 3 4 >> >|

Display 50 results per page.

### Betty Adams

▲▼	Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status	View Decision ▲▼
	<a href="#">Action Links</a>	STACEYTEST82-D-11-00002	Clinical		Super Excellent Article	Jack E. Zigler, M.D.	01/13/2010	02/02/2011	Received by Editor	<b>1 Agreed</b> <i>Darren L. Johnson, M.D.</i> <i>Due: 06/26/2017</i> <b>1 Invited - No Response</b> <i>Norman A. Johanson, M.D.</i> <i>Invited 0 days ago</i>	

### Thomas W. Bauer, M.D., Ph.D.

▲▼	Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status	View Decision ▲▼
	<a href="#">Action Links</a>	warpclone-D-03-01220	Clinical	New Section	Test of Trauma	Henrik Aagaard, M.D., Ph.D.	07/31/2003	07/31/2003	Reviews Completed	<b>3 Complete</b> <a href="#">(more...)</a>	B-Revise
	<a href="#">Action Links</a>	JBJS-D-03-01195	Case Report	New Section	Intraosseous lipoma - a case report	Vesna Janevska, PhD	07/11/2003	07/14/2003	Under Review	<b>1 Complete</b> <b>1 Agreed</b> <b>1 Late</b> <a href="#">(more...)</a>	

### Daniel J. Berry, M.D.

▲▼	Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼	Review Status	View Decision ▲▼
	<a href="#">Action Links</a>	STACEYDEV92-D-12-00005	Clinical		Sage Demo 1 - Queue Already Created	Stacey J Lavelle, MD	06/11/2012	05/13/2013	Received by Editor		
	<a href="#">Action Links</a>	STACEYTEST60-D-07-00006	Research		Test Manuscript with Reference Checking	Raj D Rao, MD	05/14/2007	05/31/2007	Received by Editor		



# Group By Manuscript Status

## Subordinate Editor's Pending Assignments - Group by Manuscript Status

**Contents:** Data are grouped by Current Status. Also displayed is the Editor with current responsibility for the manuscript. Use the up/down arrows to change the sort order.

Page: 1 of 1 (191 total submissions)

Display 500 results per page.

### Decision In Process

▲▼	⊞ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Editor Name ▲▼	Review Status	View Decision ▲▼
	<a href="#">Action Links</a> ▼	STACEYTEST61-D-08-00007	Research		6.1 Release Notification DRAFT	Ed P Garcia, M.D.	05/19/2008	05/21/2008	Ed Editor		Ready
	<a href="#">Action Links</a> ▼	STACEYTEST60-D-07-00010	AQC and arXiv Testing	New Section	astro-ph/0404182 - Can I build on 3.0? Can't on 3.1.	Raj D Rao, MD	06/05/2007	08/20/2007	Ed P Garcia, M.D.		C-Reject

### Editor Invited

▲▼	⊞ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Editor Name ▲▼	Review Status	View Decision ▲▼
	<a href="#">Action Links</a> ▼ 2	STACEYTEST73-D-09-00003	Clinical		Testing New Amex Gift Card	Stacey J Lavelle, MD	09/08/2009	11/25/2009	Laurie A. Lagasse		
	<a href="#">Action Links</a> ▼	STACEYDEV111-D-14-00002	Invite Author to Submit		Testing 7.0-05 and notes	Michael Haake	10/27/2008	06/09/2014	Marc F. Swiontkowski, M.D.		
	<a href="#">Action Links</a> ▼	STACEYTEST60-D-07-00007	AQC and arXiv Testing	New Section	Why is arxiv not working?	Raj D Rao, MD	06/05/2007	05/22/2008	Lawrence C. Rosenberg, M.D.		
	<a href="#">Action Links</a> ▼	STACEYTEST60-D-07-00008	Clinical	New Section	astro-ph/0404182	Raj D Rao, MD	06/05/2007	06/05/2007	Devang Shah		
	<a href="#">Action Links</a> ▼	STACEYTEST60-D-07-00012	AQC and arXiv Testing	New Section	8943 .tgz	Raj D Rao, MD	06/05/2007	05/21/2008	Ashley Lynch		
	<a href="#">Action Links</a> ▼	STACEYTEST60-D-07-00004	Clinical		Very Long	Raj D Rao, MD	04/26/2007	06/05/2007	Ed P Garcia, M.D.		
	<a href="#">Action Links</a> ▼	STACEYTEST60-D-07-00001	AQC and arXiv Testing	New Section	Similar to 9713	Raj D Rao, MD	01/29/2007	08/13/2007	Thomas A. Einhorn, M.D.		

Thank You!

