

**Guidelines for Editors
Using Editorial Manager 5.0**

This guide is intended to make your experience as an Editor using Editorial Manager (EM) as simple and straightforward as possible. What follows are some suggestions for simplifying your duties as an Editor while using the Editorial Manager online submission and peer review system.

This guide is designed to boil down the daily editor responsibilities into two main skill sets:

- Inviting Reviewers
- Making Decisions

SECTION	TABLE OF CONTENTS	PG.
PART 1.	IDENTIFY AND UNDERSTAND YOUR 'TO DO' LIST	2
PART 2.	GET TO KNOW THE ACTION COLUMN	4
PART 3.	HOW TO INVITE REVIEWERS	5
PART 4.	HOW TO MAKE DECISIONS	10
PART 5.	HELP	12

PART 1. IDENTIFY AND UNDERSTAND YOUR 'TO DO' LIST

There are four key folders in your account to watch. When submissions are in these folders, it means you have work to do. The numbers appended to each folder tell you how many submissions need your attention in each category.

Goal: To process the submissions in these four folders in a timely manner to limit the time to first decision. To easily accomplish this goal, empty these EM inboxes on a daily basis. No other folders on your main menu matter more than those listed in your “To-Do” list.

Example 'To-Do' List:

Editor 'To-Do' List

- My Pending Assignments (6)
 - New Assignments (2)
 - Submissions with Required Reviews Complete (1)
 - Submissions Requiring Additional Reviewers (2)
 - Submissions with One or More Late Reviews (1)
- Reviews in Progress (2)
 - Reviewers Invited – No Response (1)
 - Submissions under Review (1)

Key Folders that Manage your Work:

- a. New Assignments – Click here to see all new manuscripts assigned to you. You will need to a) Invite Reviewers, or b) Make a Decision.
- b. Submissions with Required Reviews Complete – Click here to see all submissions for which the required reviews have already been completed. It's time to make a decision, but you may also opt to invite additional reviewers.
- c. Submissions Requiring Additional Reviewers – Click here to see all submissions for which reviewers were invited but the number of required reviews has not been met because a) reviewers declined to review the submission or b) reviewers were un-invited. You will be able to invite more reviewers or make a decision as-is.
- d. Submissions with One or More Late Reviews – Click here to browse through all the submissions with late reviewers. You may choose to un-invite any severely late reviewers, invite alternate reviewers to take their place, or you may want to expedite the review by making a decision. Keep in mind that this folder shows submissions with late reviews that will be dealt with when the editorial office sends reminder letters. You may not ever have (0) submissions in this folder, but if the editorial office is using consistent reminders, the number of late reviews will be kept to a minimum.
- e. Reviewers Invited – No Response – Click here to see any submission or revised submission that has one or more outstanding Reviewer invitations.











Annals Guide for Editors using Editorial Manager

- f. Submissions under Review Click here to see any submission or revised submission that has one or more Reviewers who have agreed to a review invitation, but have not yet submitted their review.

PART 2. GET TO KNOW THE ACTION COLUMN

When you click on a folder in your 'To-Do' list, your assignments are shown in table format. The column on the left-hand side reveals all of the actions you can take on the manuscript.

Example Action Column:

Action 	Manuscript Number 	Article Type 	Article Title 	Author Name 	Initial Date Submitted 	Status Date 	Current Status 	Editor Decision 
View Submission Details Classifications Invite Reviewers View Reviews and Comments Submit Editor's Decision & Comments Send E-mail	ANNALLERGY-D-06-00009	Original Article	T-Cells	Arthur Author, M.D. 	08 Sep 2006	08 Sep 2006	With Editor	

Key Actions:

- [View Submission](#) – Allows you to view the submission in PDF format.
- [Details](#) – Displays author contact information, abstract, keywords, manuscript classifications, and all editors and reviewers assigned to the submission.
- [Classifications](#) – Allows you to edit the manuscript's classification listing prior to searching for reviewers.
- [Invite Reviewers](#) – Opens the interface for inviting reviewers.
- [View Reviews and Comments](#) – Opens the Reviewer form which captures the Reviewers recommendation and comments. Using this action code, you can also view the manuscript rating card and rate the Reviewer.
- [Submit Editor's Decision and Comments](#) – Opens the Decision form which captures your decision term, comments to the editorial office and any comments to the author.
- [Send E-mail](#) – Allows you to send ad-hoc emails as needed.

PART 3. HOW TO INVITE REVIEWERS

These instructions focus on inviting reviewers to critique the original submission of a manuscript. Please incorporate the following suggestions when soliciting reviews for revised submissions.

When inviting reviewers to review revised manuscripts:

When you click “Invite Reviewers”, the default search criteria will automatically bring up the previous reviewers who originally handled the submission. After you select the previous reviewers, EM will give you the ability to send the previous reviewer comments by email.

Suggestions

1. At the top of the reviewer selection screen, be sure to change the number of required reviews to reflect the number of reviewers that you actually invite.
2. You may want to turn off the automatic un-invite function at the top of the reviewer selection screen by changing the number of days to respond to the invitation to “0”.
3. You may want to customize the reviewer invitation letter so the reviewer understands the invitation is for a revised manuscript they previously reviewed.

Understand and Set the Required Number of Reviews

When you first click “Invite Reviewers”, the top of the page will show the journal’s preferred number of reviewers. Here’s what this means and how to use the settings to efficiently gather reviews for the journal.

Text seen on Editorial Manager Screen:

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as **2** [Change] review(s) have been completed.

What it means:

- You should send invitations to however many reviewers are listed here (**2**) in order to comply with the journal’s reviewer-selection preferences.
- You may still select any number of alternate reviewers. The Editorial Office suggests selecting 1 to 3 alternates.
- If you would like to change the number of reviewers required for a particular submission, click [Change] and input the number of reviews you intend to request.
- Once the required number of reviews has been completed, the submission will automatically move to your Submissions with Required Reviews Complete folder.
- If all the invited reviewers and the alternate reviewers selected for a submission either decline the invitation or are uninvited before the required number of reviews have been submitted, the submission will automatically move to your

Submissions Requiring Additional Reviewers folder.

Understand and Set the Response Due Preference

When you first click “Invite Reviewers” the top of the page will show the journal’s preferred number of days a reviewer has to respond to an invitation. Here’s what it means and how to use the settings to efficiently gather reviews for the journal.

Text seen on Editorial Manager Screen:

Automatically un-invite Reviewers who do not respond within 3 [Change] day(s). Set this number to 0 to turn off the automatic un-invitation process for this submission.

What it means:

- Unless this number is changed to 0 (zero), any reviewers you invite will be automatically uninvited in 3 days.
- Choose alternate reviewers in order to ensure that any uninvited reviewers will be automatically replaced by the system.
- If you would like to change the number of days the reviewers have to respond to invitations, click [Change] and input the number of days you prefer.
- If all the invited reviewers and the alternate reviewers selected for a submission either decline the invitation or are uninvited before the required number of reviews have been submitted, the submission will automatically move to your Submissions Requiring Additional Reviewers folder.

Invite Reviewers

After you review the journal’s preferred review settings, you are ready to invite reviewers.

Example Search String for Inviting Reviewers:

Invited Reviewers

Search My Journal from

Steps to Follow:

1. Adjust the Search My Journal drop-down menu and select how you would like to search.

- **Default Choice: Search for Reviewers** – Allows you to search by inputting a reviewer’s First or Last Name, Position, Department, Institution, City, State, or Country.
- **Search by Classification Matches** – Gives you a list of classification terms which are identical matches with various reviewers. You choose which term you

would like to use to find reviewers. **Note:** The list is organized by Classification, with associated Reviewers listed below each term. A Reviewer may appear multiple times if they have multiple Classification matches. When you select a Reviewer's name by clicking the checkbox, that Reviewer is displayed as 'selected' throughout the list, under each Classification that they are associated with. However, they will only receive one invitation.

- **Search by Personal Classifications** – You can choose a maximum of 5 classification terms to match with reviewers.
- **Suggest Reviewers** – Automatically matches manuscript classifications with reviewer classifications, and brings up a list prioritized by the preferences set in your “My Suggest Reviewer Preferences” button on the main Reviewer Selection screen.
 - The default “My Suggest Reviewer Preferences” delivers a list that excludes reviewers with possible conflicts of interest (possible authors or people from the same institution), excludes reviewers who are unavailable, have too many reviews, or who have not been used in an extensive period of time.
 - The default “My Suggest Reviewer Preferences” prioritizes and orders the list based on classification matches, editorial board membership, number of pending reviews, average days of reviews outstanding, and the date the last review was completed.

2. Adjust the From drop-down menu.

- The **From drop-down menu** allows you to **toggle between different sections of the journal database**: you can search “All Reviewer Roles”, specific reviewers, specific reviewer roles, or the “Entire Database” (including authors).
 - **NOTE:** A new reviewer category referred to as “Associate Reviewer” has been added. Associate Reviewers are generally individuals without extensive experience in manuscript review who have expressed an interest in developing the skill set. They are paired with one or more senior reviewers who can provide educational perspectives for the Associate Reviewer. The Editorial Office will provide feedback to the Associate Reviewer by sharing the review obtained by the more senior person. With continued experience and at the discretion of the Annals Editorial staff, the Associate Reviewer will ultimately be promoted to full reviewer status.

3. Click “Go”.

- If you chose to search by “Search for Reviewers,” “Search by Classification Matches,” or “Search by Personal Classifications,” then you will have to complete a second search screen before delivering results.
- Clicking “Suggest Reviewers” will automatically produce results because the journal utilizes a classification list.

4. View the Results.

- The results of your query will display in table format with a “snapshot” of the reviewer's qualifications in the main view.

- The **‘snapshot’ view** of the reviewer’s classifications, availability and statistics can be seen from this page, along with classification matches with the manuscript, editorial board status, specific reviewer role, people notes, number of pending assignments, reviewer rating, etc.
- **For more detailed information** about a specific reviewer, click on their name to open their full information. This page will show you all their assignments and statistics for any and all of the reviewer’s possible roles with the journal (author, reviewer, or editor roles). You will be able to view past reviews, any submissions that have been authored, and any papers for which they have acted as editor.

5. Select Reviewers by clicking the box beside their name.

- You can select multiple reviewers to invite simultaneously.

6. Click “Send Default Letter” at the bottom of the page to send invitations.

- You may also click “Send Custom Letter” if you’d like to edit the default letter before sending it.
- After you click to send a letter, you may be shown a drop-down box including a selection of letters that may be sent to the reviewer. For instance: Reviewer Invitation or Reviewer Invitation for Revised Submission. Choose the most appropriate letter and click “Send Default Letters”.

7. Click “Reviewer Selection Summary”.

- Compare the number of required reviews at the top of the page to the number of reviewers you actually invited. Make sure they match. You can use the [Change] button to make any adjustments.

8. Select Alternate Reviewers.

- Use the ‘Alternate Reviewers’ search string to assign replacement reviewers. The functionality of the search is exactly the same as inviting reviewers. The only difference is that an actual invitation email is not sent out of the system until the alternate has been promoted
 - **NOTE:** In order for alternates to be promoted, they must have the same reviewer role as the un-invited reviewer. For instance, if you have invited both a Reviewer and an Associate Reviewer, the alternates you select must have these same roles or they will not be promoted.
- An Alternate Reviewer is 'promoted' to Reviewer status in one of four ways:
 - 1) Reviewer initiated - if a Reviewer declines an invitation, an Alternate Reviewer (**with the same Reviewer Role**) is automatically promoted as a replacement.
 - 2) Time initiated - if the Reviewer does not respond to the invitation within 3 days, the Reviewer will automatically be un-invited and an Alternate will automatically be promoted as a replacement. The automatic un-invite and promotion takes place at midnight, US Eastern time.
 - 3) Editor initiated - the Editor 'un-invites' a Reviewer by clicking Un-invite on the Reviewer Selection Summary screen. Reviewers are un-invited

by users on the new Reviewer Selection Summary screen. Any Alternates in the queue (**with the same Reviewer Role as the uninvited Reviewer**) are automatically promoted as a replacement.

- 4) Manual promotion - the Editor manually promotes an Alternate Reviewer by clicking Promote on the Reviewer Selection Summary screen.

- After you select alternate reviewers, you will receive a drop-down box that includes a selection of letters that may be sent to the reviewer if they are eventually promoted and invited to review as an alternate. For instance: Reviewer Invitation or Reviewer Invitation for Revised Submission. Choose the most appropriate letter and click “Confirm Letter Choices and Proceed”. If you wish to customize an alternate reviewer invitation letter before sending it out, click Customize edit and save the letter then and click “Confirm Letter Choices and Proceed.” You will be returned to the Reviewer Selection.

9. Exit the invitation screen and monitor your ‘To-Do’ List.

- Once you are finished with inviting reviewers and selecting alternate reviewers, click **Return to Main Menu** to return to your ‘To-Do’ List.
- Monitor your Submissions with Required Reviews Complete folder for submissions where all reviewers have completed their assignments and await your decision.
- Monitor your Submissions Requiring Additional Reviewers folder for submissions where the number of invited reviewers has fallen below the number of required reviews for that submission.
- Monitor your Submissions with One or More Late Reviews folder for submissions where the reviewers have failed to complete their reviews on time.

Additional Features

At the bottom of the reviewer selection screen and on various other pages in Editorial Manager, editors are given some additional links to help manage their reviewer assignments.

These Links Are:

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

What They Mean:

- [Request Unregistered Reviewer](#) – If you would like to ask the editorial office for assistance in contacting a reviewer that is not in the journal’s database, click this button and provide any information (i.e., name, institution, phone number, etc.) that will help the editorial office contact the potential reviewer. The editorial office will attempt to locate an email address for this person, register them as a reviewer, and invite them to review the paper.

- [Register and Invite New Reviewer](#) or [Register and Select Alternate Reviewer](#) – If you cannot find a reviewer in the journal’s database, but you know the name and e-mail address of a prospective reviewer, click these links to register new reviewers to the system.
- [My Suggest Reviewer Preferences](#) – Click this link to set your preferences for the “Suggest Reviewer” search described above. This screen allows you to prioritize and order the search results based on classification matches, editorial board membership, number of pending reviews, average days of reviews outstanding, and the date the last review was completed.
- [My Reviewer Display Preferences](#) – Click this link to set viewing preferences for search results (this does not apply to “Suggest Reviewer” searches, as the link described above controls that particular search).

PART 4. HOW TO MAKE DECISIONS

Goal: To make decisions in a timely manner and continue to lower the time to first decision. Editors can make decisions on submissions at any time and from any folder. Traditionally, decisions are made once the submission has received the required number of reviews and shows up in the editor’s ‘To-Do’ list in the [Submissions with Required Reviews Complete](#) folder.

Steps to Follow:

1. Click [Submit Editor's Decision and Comments](#) to open the decision form.
2. Click “**Editor Instructions**” to view instructions from the editorial office.
3. Choose a decision term from the drop-down box at the top of the form.
4. Click [View Manuscript Rating Card](#) to view reviewer ratings of the submission.
5. **View reviewer recommendations forms.**
 - Reviewer comments can be viewed in a number of ways from the editor’s decision form:
 - a) Click on the reviewer’s recommendation term (Accept, Reject, etc.) to open up the complete Reviewer Form. From this view, you can also rate the reviewer from 1-100.

NOTE: The journal requires that reviewers be rated and provides a rating scale for their editors to use. View the “Editor Instructions” for details.
 - b) View the reviewer comments to the editor within the box labeled “Confidential Comments to the Editor”.
 - c) View and Edit the reviewer blind comments to the author in the box labeled “Comments to the Author”.
6. **Complete the Confidential Comments to the Editor box.**
 - Complete any questions from the editorial office.

Annals Guide for Editors using Editorial Manager

- Enter any message you'd like to send to the editorial office.
- You may also view all reviewer comments to the editor from within this box.
- This information will not be sent to the author or the reviewers.

7. Enter any Comments to the Author.

- **NOTE: Anything in this box will be automatically merged into the decision letter that is sent to the author.**
- View and Edit the reviewer blind comments to the author.
- Enter any additional comments you may have to the author.
- These comments are anonymous.

9. Click "Proceed" to see a proof of the decision.

10. Click "Submit Decision" to initiate the notification to the author.

11. "Preview" and "Send" the notification letter to the author.

PART 5. HELP

Here are some common problems reported by editors. If you experience problems not addressed here, please login as an Editor and click “Help” on the menu bar. If your issue is not resolved by viewing the online Editor Help, please contact the editorial office for more information.

Common questions about FDF file formats

Q: Why do PDF files download as FDF files in Editorial Manager?

A: An FDF extension guarantees that the file will open in Adobe Reader and not in a browser window, which is a less-stable PDF viewing environment. Different browsers may make files appear differently, while Adobe Reader ensures that the files can be opened and read as they were intended.

Q: How do I set my Adobe Reader to read FDF files?

A: In a Windows system, do the following:

- Double click on My Computer
- Click on Tools
- Choose Options
- Click on the tab for File Types
- Scroll down the list for the file extension FDF
- Make sure FDF is set to open with Adobe Reader
- Repeat these steps for PDF extensions

In a Macintosh system, do the following:

- Launch Internet Explorer or Netscape
- Click on Preferences
- Choose File Helpers (in Explorer) or Applications (in Netscape)
- In Explorer, look for the application Adobe Acrobat Reader and check that it has an entry for .FDF files under extension type.

If it does not, click Add and use these values:

- Description – Acrobat Form Data Format
- Extension - .FDF
- Mime Type – application/vnd.FDF
- File Type – FDF

In Netscape, click the icon for Portable Document Format and check that it has an entry for .FDF files under suffixes.

If it does not, add these values:

- Description – Acrobat Form Data Format
- Suffixes - .FDF
- Mime Type – application/vnd.FDF
- File Type – FDF