AllenTrack

Manuscript Tracking System

USER GUIDE

Anna Gramkow
March 2003

Introduction

Aims of the User Guide

This User Guide aims to:

- introduce you to AllenTrack as a new user
- take you step-by-step through the various tasks which you will need to perform
- show you how to use the AllenTrack database
- help you to provide quick answers to email or telephone queries from authors and reviewers

What is AllenTrack?

AllenTrack is:

- a completely web-based product designed for manuscript submission, review and tracking
- a workflow system which takes the manuscript right from author submission through to the final editorial decision
- an integrated system for use by editors, assistants, reviewers and authors

Users and roles

In AllenTrack, all users are assigned a specific 'role'. The seven main roles in the system are Editor in Chief, Editor, Associate Editor, Reviewer, Author, Staff and System Administrator. Each role can perform different tasks and has different levels of access to the manuscripts in the system.

Some journals do not have all roles- i.e. Associate Editor and/or Editor in Chief. Additionally, some journals will call the Editor by a different label, such as Senior Editor or the journal may call the Associate Editor by the title Section Editor.

For the purposes of this document, the above "classic" role names will be used. If you are uncertain as to what role you need access information about, please contact AllenTrack Support for clarification.

Roles and permissions

Every new user who registers with the system is automatically given permission to perform Author tasks (which are all related to manuscript submission). For a user to be given Reviewer permissions, they need to be invited to act as a reviewer via the Assign Potential Reviewer task for the specific manuscript. Users given the Editor in Chief, Editor, Associate Editor, Staff and System Administrator roles are given the relevant permissions by another System Administrator.

Folders and links

AllenTrack is organized along a system of folders and links. All tasks relating to the manuscripts are contained in these various folders and links. Each user sees a number of different folders and links (and therefore can perform different tasks), depending on the role that has been allocated to them.

By default, the Staff role sees all folders and links whereas the Editor in Chief, Editor, or Associate Editor see an applicable sub-set of folders. The Staff folders are:

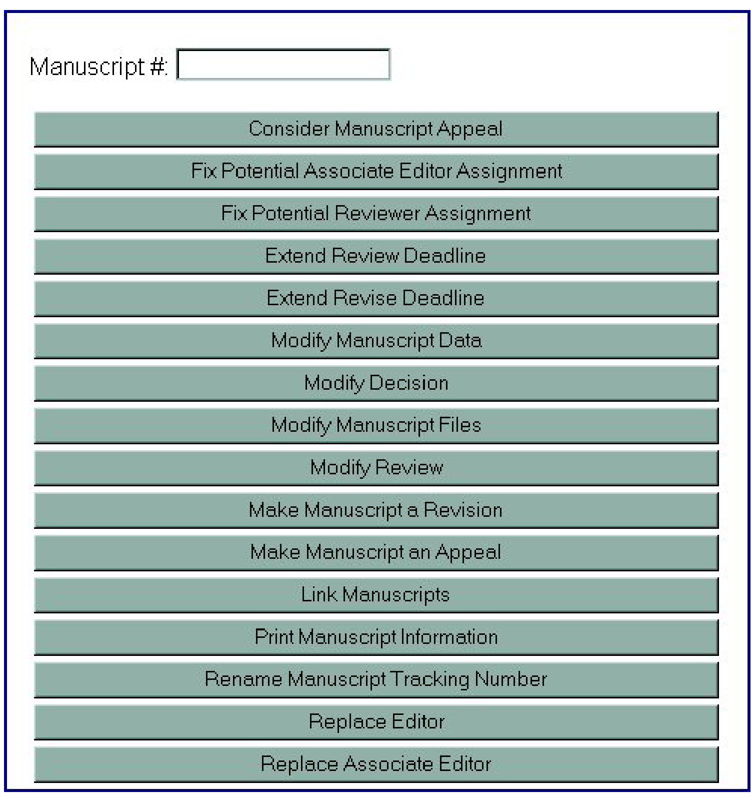
Author folders: these folders are to help you track the submission/conversion of a manuscript before the Author has approved it. This means that you can access the manuscript from the moment the author starts to submit it (that is, you can see partial submissions, files awaiting conversion, etc.).

Workflow folders: these eleven folders, starting with the Initial QC folder and finishing with the Decision Ready for Author, map the various stages of the editorial workflow. Actions performed by Editors and Staff 'push' the manuscript through the folders and therefore through the workflow. You may not see all eleven folders, depending on how your site has been configured.

Post Decision folders: in these folders you can view the decisions made concerning a manuscript. The Post Decision folder contains all manuscripts that have had a decision made concerning them (accept, reject, withdrawn, etc.). Other folders in this section, such as the Waiting for Revision/Appeal folders allow you to submit as a proxy author or chase for revisions.

Manage Accounts: this link allows you to manage individual user accounts within the database. For example, in this folder you can merge duplicate user accounts, add people to the database, and set permission or modify a person's account or password.

Advanced Manuscript tasks: this link gives you a list of additional tasks which you may need to perform outside of the workflow, such as withdrawing a manuscript, changing the manuscript details/files, or re-assigning an editor.



Roles and tasks

In AllenTrack, different tasks are performed by individuals depending on their particular role. Therefore, some tasks are described as Editor tasks, some as Associate Editor tasks, some as Reviewer Tasks, some as Staff tasks and some as System Administrator tasks.

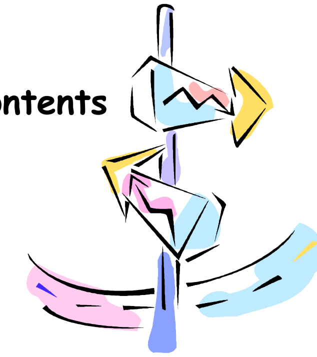
In reality there is a certain amount of overlap between tasks that are performed by both Editors and Staff. Therefore, specific journals can have each user do what is customary.

The System Administrator role is only assigned to a small number of people. If there is a task in the System Administrator section that you wish to be performed, please contact your journal's administrative staff.

Additional Support

If you need additional support, please contact support@allentrack.net or call (800) 627-0326 ext. 257, ext. 133, or ext. 274. Emergency, night, and weekend support is also available at (785) 691-5926. E-mail contact is preferred, so we can keep a written record, but call if you need us.

Contents



Associate Editor Tasks

Staff tasks

System Administrator tasks

AllenTrack screens

Homepage

This screen is the main screen where all of a user's folders are displayed. You can reach this screen at any time after logging in by clicking on the **Home** link, which is situated at the top of every page underneath the journal banner. On this screen, red arrows appear next to folders to indicate that an action is pending in that particular folder.

Person Bio Screen

This screen is reached by clicking a hyperlink of an individual's name. This screen will display: the person address and any other addresses (temporary), pending manuscripts, completed manuscripts, reviews and rankings, review requests, person notes and person keywords. There are links on this page leading to: address history, add/modify person keywords and modify profile (this will take you back to the registration form).

Manuscript Summary Screen

This screen is reached by clicking on a manuscript number hyperlink. This screen will display: manuscript number, current revision number, submission date, current stage, title, manuscript type, corresponding author, contributing authors, abstract, primary and secondary editors, reviewers, author's suggestions of reviewers to include and exclude and manuscript keywords. There are links on this page leading to: manuscript items (where you can view the manuscript files), current stage workflow task (the next task to perform for the current stage of the manuscript), check manuscript status (manuscript history table), send manuscript correspondence, add/view staff notes, view email (all emails and letters that have been sent through the system in correspondence with this manuscript), and advanced manuscript tasks.

Manuscript #	23
Current Revision #	0
Submission Date	2002-08-18
Current Stage	All Reviewers Assigned
Title	Test
Running Title	Test
Manuscript Type	Regular Article
Manuscript Comment	comment
Corresponding Author	Marissa Barlow (Allen Press)
Contributing Author	N/A
Abstract	Test
Associate Editor	Lewis Herschberger
Editor	Grant
Reviewers	Troy Smith , Stephanie Hull
Author Reviewer Suggestions to Include	N/A
Author Reviewer Suggestions to Exclude	N/A
Key Words	test, testa, testb, testc

Registration form

This form is where all users are required to enter their personal details. You will need to use this form to register as a user. Staff will re-enter a person's registration form when modifying a person's profile.

Submission form

This form is used to enter the manuscript details when submitting a manuscript to the system. Both Author and Staff (acting as proxy) will use this form and Staff will re-enter the submission form if any details need amending.

Using the Back button

Please avoid using the browser back button; this can sometimes cause errors to occur. Wherever possible use the 'cancel' button that can usually be found at the bottom of the screen.

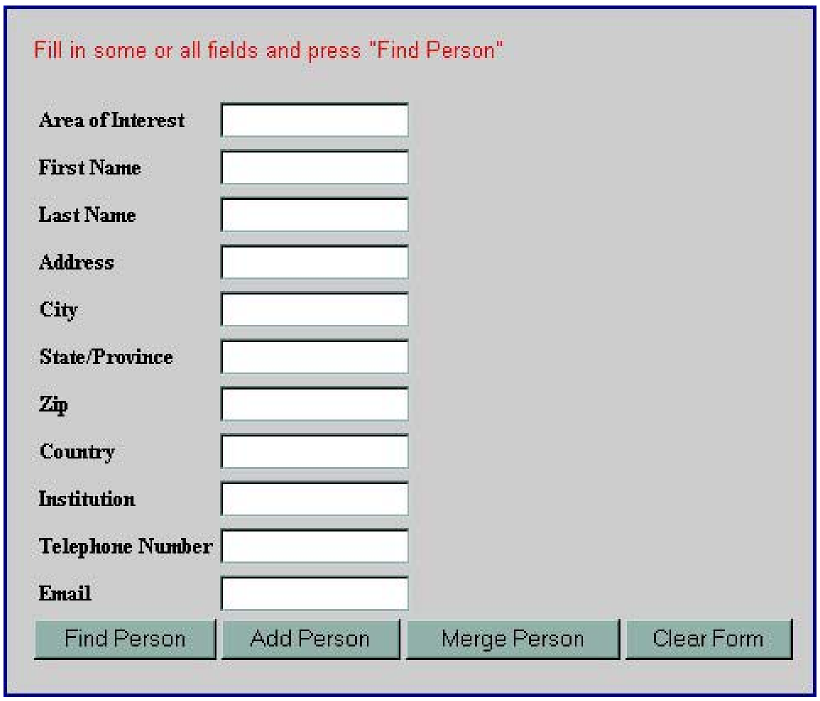
Database Tasks

Database: how to search for a person in the database

When you need to find a person in the database there are a number of different search fields you can use.

To search the database for a person:

- Enter data in the fields that you wish to use to search for a person. You may use the wildcard (*) when searching. For example: searching on an asterisk followed by a lowercase b (b*) in the field **First Name** will find every person with a letter b anywhere in their **First Name**.
- Click on the **Find Person** button



The search results will be returned to you as a list of person names matching your search criteria. Along with the person names you will also see details of institution, manuscripts authored, reviewed etc. and keywords/area of expertise.

Clicking on a user name hyperlink will take you to that person's profile, including the keyword table and notes field.

If an alternative address is present, this will appear next to the primary work address on the person profile.

To check a person's title, i.e. Prof, Dr, you will need to click on the **Modify Profile** button at the bottom of the keyword table.

Database: how to add a new person to the database

There are many ways to add a new user to the database. The easiest method is detailed below.

Before you add a new user to the database, you will need to search the database to make sure that they are not already registered on AllenTrack. To do this you will need to use **Find Person**.

- Click on **Find Person**
- Enter data in the fields that you wish to use to search for the user. You may use the wildcard (*) when searching.

If the person is already in the database there will be a list of user names matching your search criteria. Be sure to double-check your spelling if no results are found. Along with the names you will also see details of institution, manuscripts authored, reviewed etc. and keywords/area of expertise.

If the name that you require is not already in the database, 'no matches found' will be displayed.

To add a new person to the database:

- Click on **Add Person**

You will be taken to the registration form where you will be required to fill out all required fields. Fields marked with (*) are required fields. You will not be able to proceed if data is not present in these fields.

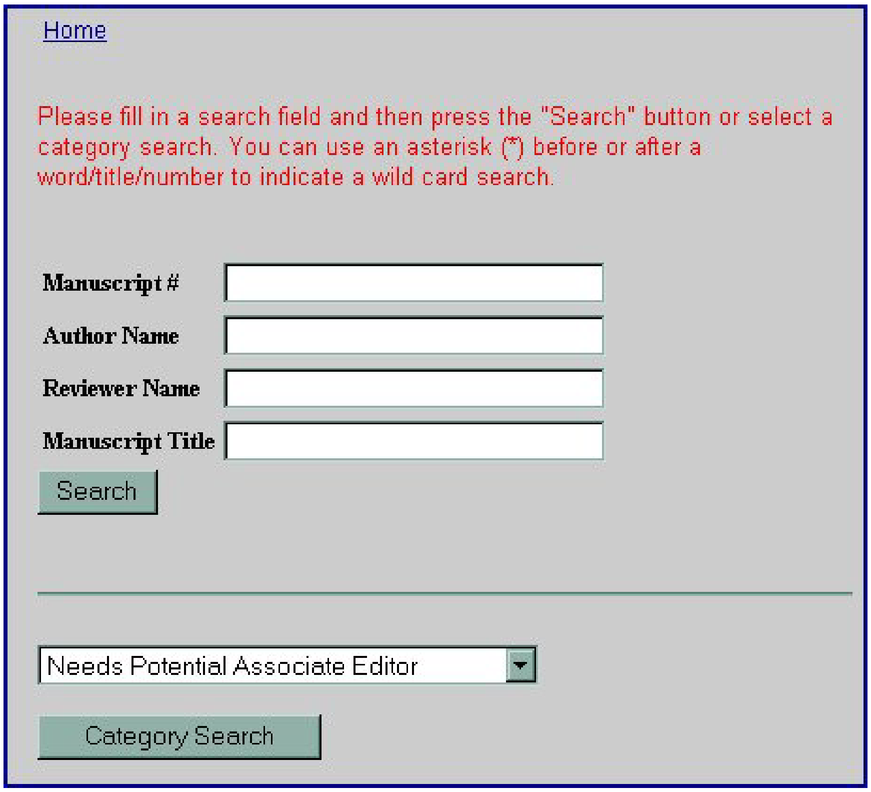
- Enter the details of the person
- Select whether you wish to **Email Login and Password to New User**
- Click **Add Person**

Database: how to search for a manuscript in the database

There will be many reasons why you will need to search for a manuscript in the database.

To search for a manuscript you will need to use the function **Check Manuscript Status.**

- Click on **Check Manuscript Status**
- Enter data in the fields that you wish to use to search for the manuscript; use an asterisk "*" as a wildcard if you wish (e.g., enter 03-01* and 03-010 through 03-019 would be returned)
- Click **Search**



Alternatively you can search on **Category Search**, which searches by stage.

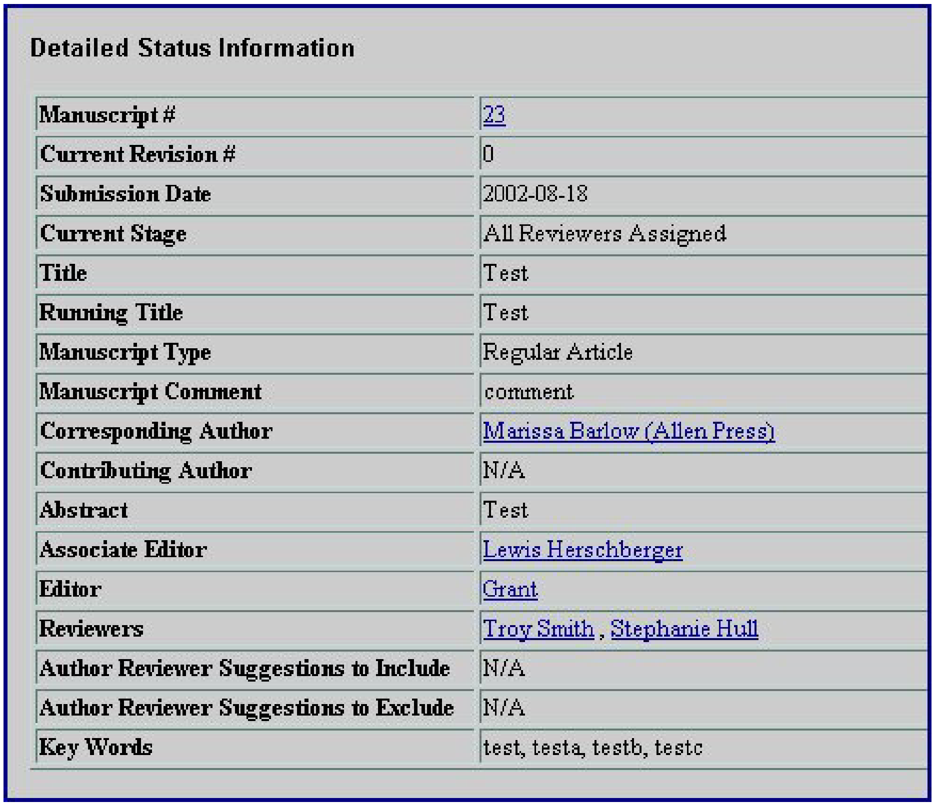
The search results matching your search criteria will be returned as a table. The table will display the manuscript number, manuscript title, corresponding and contributing authors, current stage, primary and secondary editors and the decision.

Manuscript #	Manuscript Title	Corresponding Author	Contributing Authors	Current Stage	Editor	Associate Editor	Decision
11R	Test	Marissa Barlow (Allen Press)	Troy Smith (Allen Press)	Potential Reviewers Assigned	Grant	Linda Peterson	N/A
11	This is a test	Marissa Barlow (Allen Press)	Troy Smith (Allen Press)	Revision Received	Grant	Linda Peterson	Major revision and additional review
13	This is Another Test	Marissa Barlow (Allen Press)	N/A	Manuscript Withdrawn	Grant	Linda Peterson	Withdrawn
14	test11	Marissa Barlow (Allen Press)	Chris Warren (Allen Press)	Manuscript Withdrawn	Grant	Albert Einstein	Withdrawn

- Click on the manuscript you require and you will be taken to the manuscript summary screen.

To check the history of the manuscript:

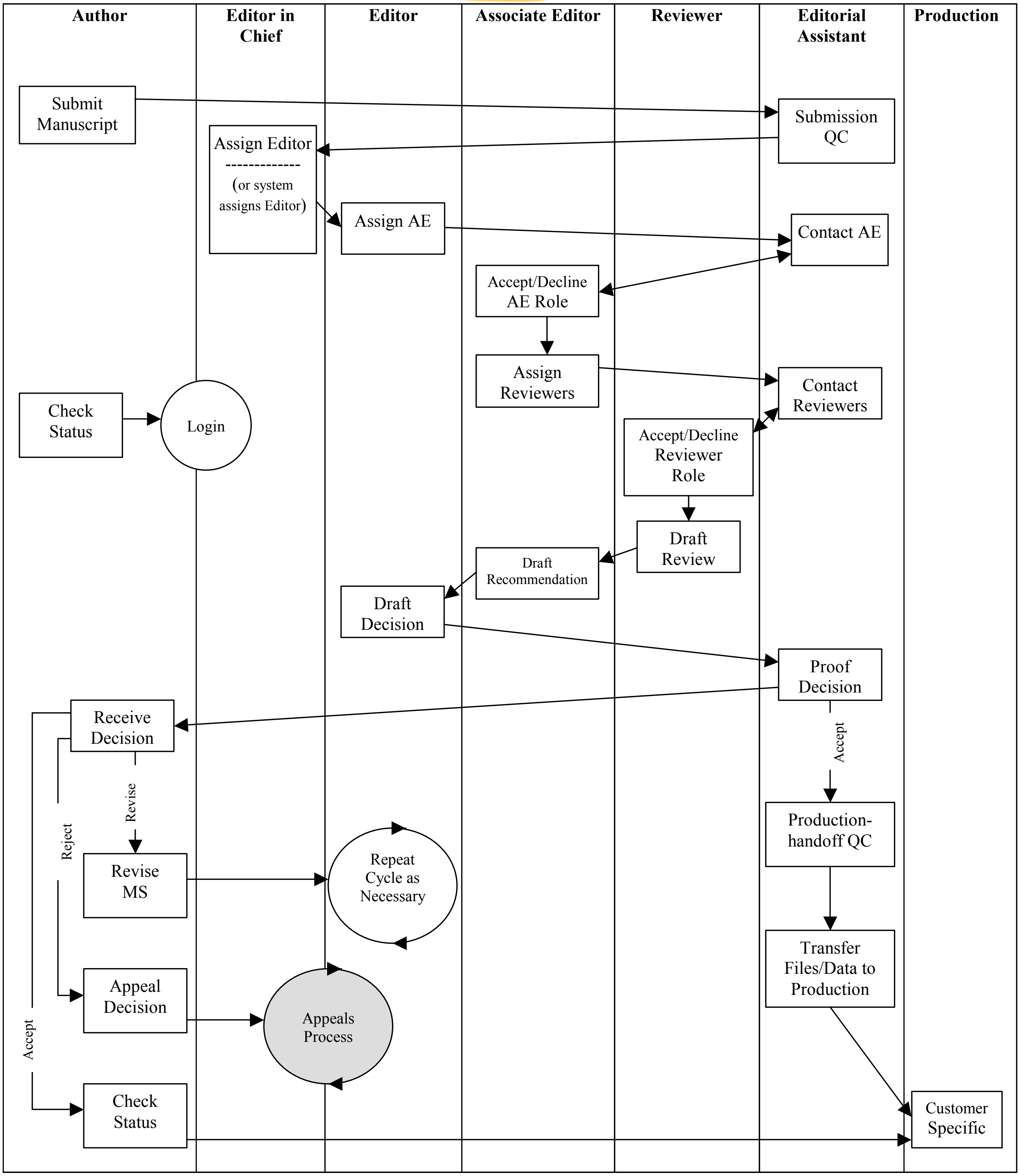
- Click **Check Status**



Detailed Status Information

Manuscript #	23
Current Revision #	0
Submission Date	2002-08-18
Current Stage	All Reviewers Assigned
Title	Test
Running Title	Test
Manuscript Type	Regular Article
Manuscript Comment	comment
Corresponding Author	Marissa Barlow (Allen Press)
Contributing Author	N/A
Abstract	Test
Associate Editor	Lewis Herschberger
Editor	Grant
Reviewers	Troy Smith , Stephanie Hull
Author Reviewer Suggestions to Include	N/A
Author Reviewer Suggestions to Exclude	N/A
Key Words	test, testa, testb, testc

Workflow


Author
Editor in Chief
Editor
Associate Editor
Reviewer
Editorial Assistant
Production
Submit Manuscript
Submission QC
Assign Editor

(or system assigns Editor)
Assign AE
Contact AE
Accept/Decline AE Role
Assign Reviewers
Contact Reviewers
Check Status
Login
Accept/Decline Reviewer Role
Draft Review
Draft Recommendation
Draft Decision
Proof Decision
Receive Decision
Accept
Revise
Reject
Production-handoff QC
Revise MS
Repeat Cycle as Necessary
Transfer Files/Data to Production
Appeal Decision
Appeals Process
Accept
Check Status
Customer Specific

AllenTrack is organized along a system of workflow folders.

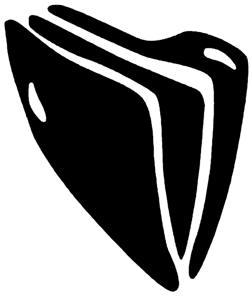
There are eleven main workflow folders:

1. Initial QC
2. Awaiting Editor Assignment (for multi-editor workflows)
3. Awaiting Associate Editor Assignment
4. Contact Potential Associate Editor
5. Awaiting Reviewer Assignment
6. Contact Potential Reviewer
7. Under Review
8. Chasers
9. Awaiting Associate Editor Recommendation
10. Awaiting Editor Decision
11. Decision Ready for Author

Each manuscript always starts in the first folder and ends in the last folder, no matter which route it may take through the system. A manuscript is 'pushed through' the various folders, as a result of actions taken by Editors and Staff.

The above diagram maps the roles against the different stages in the workflow.

Folders



Depending on the role that you have been assigned, you will be able to access different manuscripts in the system in different ways.

Accessing manuscripts in the Editor folders

Beside each of the eleven workflow folders, an editor will see a link with either a number in parenthesis- for example:

Awaiting Reviewer Assignment (15)

- OR -

Several links:

Awaiting Reviewer Assignment AE 2 Ed 10 All 20

In the first case, the system is configured to display a simple count of the number of assigned manuscripts at that stage.

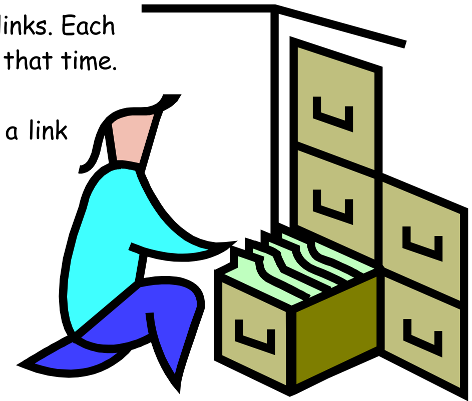
In the latter case, the three links reflect the counts filter by the various (multiple) roles for which the editor participates. In this specific example, this end user is an Associate Editor for 2 papers that are Awaiting Reviewer Assignment, 10 papers for which they are the editor, and 20 papers in the entire system. This multi-count display has been primarily designed for multi-editor / multi-associate editor journals.

Each link leads to the manuscripts that are currently in the folders at that time.

On the three-link display, each link will lead you to a different set of manuscripts within that folder, as follows:

AE – this gives you access to all of the manuscripts in that folder for which you are the Associate Editor
Ed – this gives you access to all of the manuscripts in that folder for which you are the Editor.
All – this gives you access to all of the manuscripts in that folder

Accessing manuscripts in the Staff folders



In addition to the workflow folders, Staff will see other folder links. Each link leads to the manuscripts that are currently in the folders at that time.

Beside each of the eleven workflow folders, the Staff will see a link with either a number in parenthesis- for example:

Awaiting Reviewer Assignment (15)

- OR -

Several links:

Awaiting Reviewer Assignment Staff 2 All 20

In the first case, clicking on the single link will provide Staff with a sub folder of all manuscripts at that stage.

In the second case, each link will lead the Staff to a different set of manuscripts within that folder, as follows:

Staff – this gives you access to all of your editor's manuscripts in that folder (where filter by editor or filter by associate editor is configured)

All – this gives you access to all of the manuscripts in that folder

Editor or Editor in Chief: how to assign editors

Workflow folder: **Awaiting Editor Assignment**

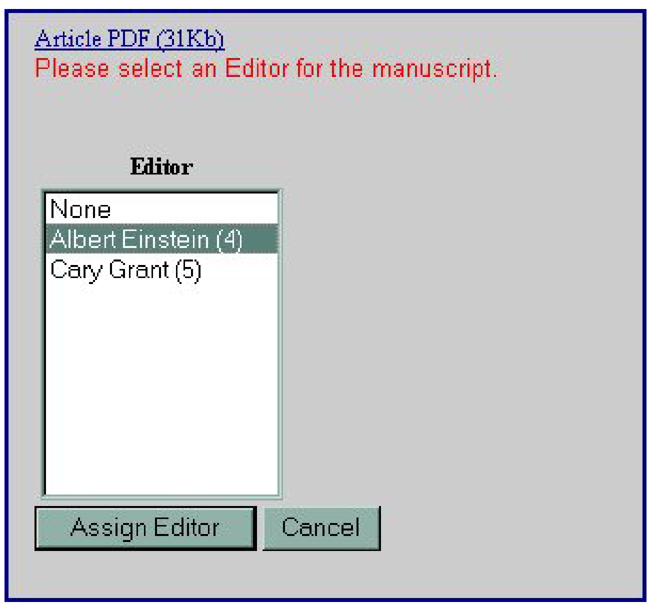
*** This folder is only present on multi-Editor workflow.

To assign an editor to a manuscript:

- Click on **Awaiting Editor Assignment**

This folder contains manuscripts.

- Select the manuscript you wish to assign an editor to, by clicking on the manuscript link
- If you wish, view the manuscript items using the PDF links
- Highlight the name of your chosen editor
- Click **Assign Editor**



Next folder: the manuscript will now move into the Awaiting Associate Editor Assignment folder.

Editor: how to assign Associate Editors

Workflow folder: **Awaiting Associate Editor Assignment**

*** This folder is only present on multi-Associate Editor workflows/journals.

To assign an associate editor to a manuscript:

- Click on **Awaiting Associate Editor Assignment**

This folder contains a list of manuscripts.

- Select the manuscript for which you wish to assign Associate Editor by clicking on the manuscript number link
- If you wish, view the manuscript items using the PDF links
- Highlight the name of your preferred Associate Editor
    - Some journals will have up to four selection lists- "First Choice", "Second Choice", etc. that will allow you to specify your preference of Associate Editors if the first choice is too busy or has a conflict.
- Click **Assign Associate Editor**

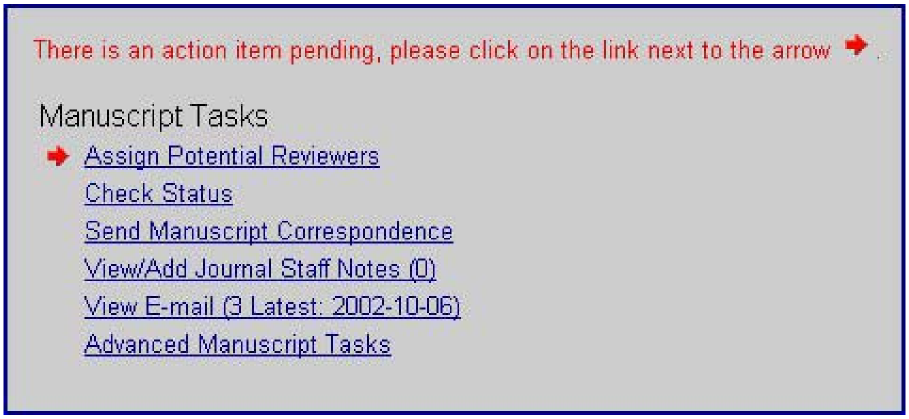
Next folder: the manuscript will now move into the **Contact Potential Associate Editor Assignment** folder.

Editor: how to assign reviewers

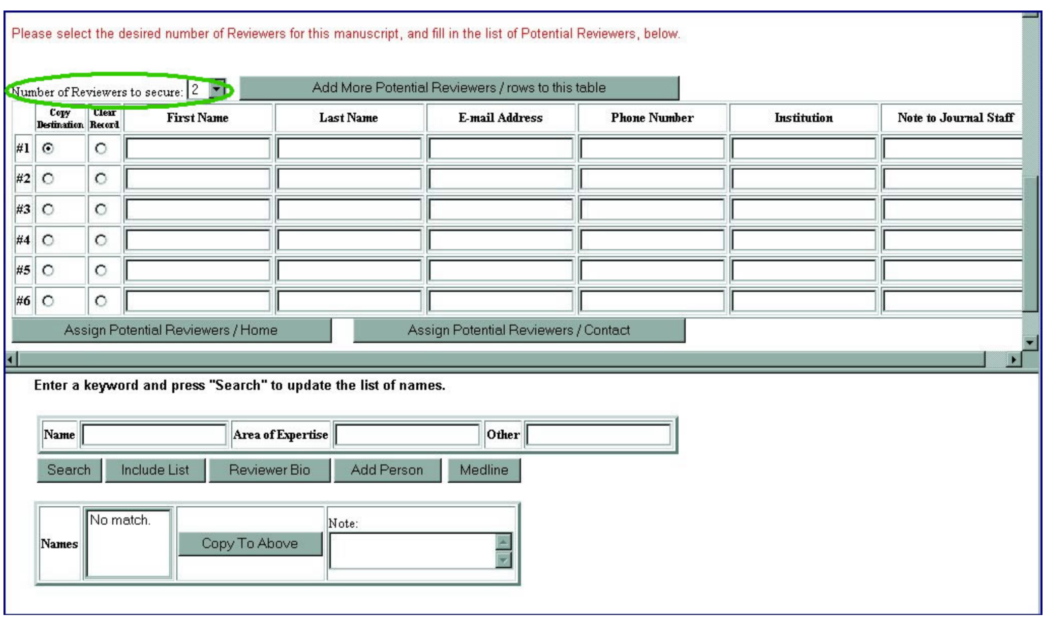
Workflow folder: **Awaiting Reviewer Assignment**

To assign reviewers to a manuscript:

- Click on **Awaiting Reviewer Assignment**
- Select the manuscript you wish to assign reviewers to by clicking on the manuscript number link
- Click on **Assign Potential Reviewers**



A split screen will now appear. The top half of the screen shows the table of assigned reviewers and also gives you the option to choose the number of reviewers to secure for the manuscript. You can change the default number of reviewers if you wish. The bottom half of the screen is where you search for individual reviewers.



- Select the **Number of Reviewers to Secure** (top half of screen; see circled object in picture above)

- Use the search fields provided to enter the details of the reviewers
    - First or Last Name
    - Area of Expertise/Keywords
    - Other
- When data has been entered in the search fields, click **Search**
    - Words divided by spaces means "AND"
    - Words preceded by ! means "NOT"
- When the results have been returned, highlight the desired reviewer
- For information about a Potential Reviewer, click on a name to highlight it:
    - **Person Bio** – this will take you to the person bio screen
    - **Medline** – PubMed site will open in a separate window
    - **Note:** - Notes about a person will appear in the box to the right
- **Include List** and **Exclude List** buttons display lists of Potential Reviewers suggested to include or exclude by the author
- When the desired reviewer is found and the name is highlighted, click **Copy to Above**

Once you have clicked copy to above, the reviewer's details will automatically enter the assignment table on the top screen. If you do not find the desired reviewer in the database, you may either enter that person's information using **Add Person** (preferred) and then search for the reviewer and **Copy to Above**, or you can enter the reviewer's information directly into the table (top half of screen).

- Click **Assign Potential Reviewers/Contact** or **Assign Potential Reviewers/Home** (if a Staff person is responsible for contacting Potential Reviewers)

<ins>Next folder:</ins> <ins>**Contact Potential Reviewer**</ins>

Editor: how to contact reviewers

Workflow folder: **Contact Potential Reviewer**

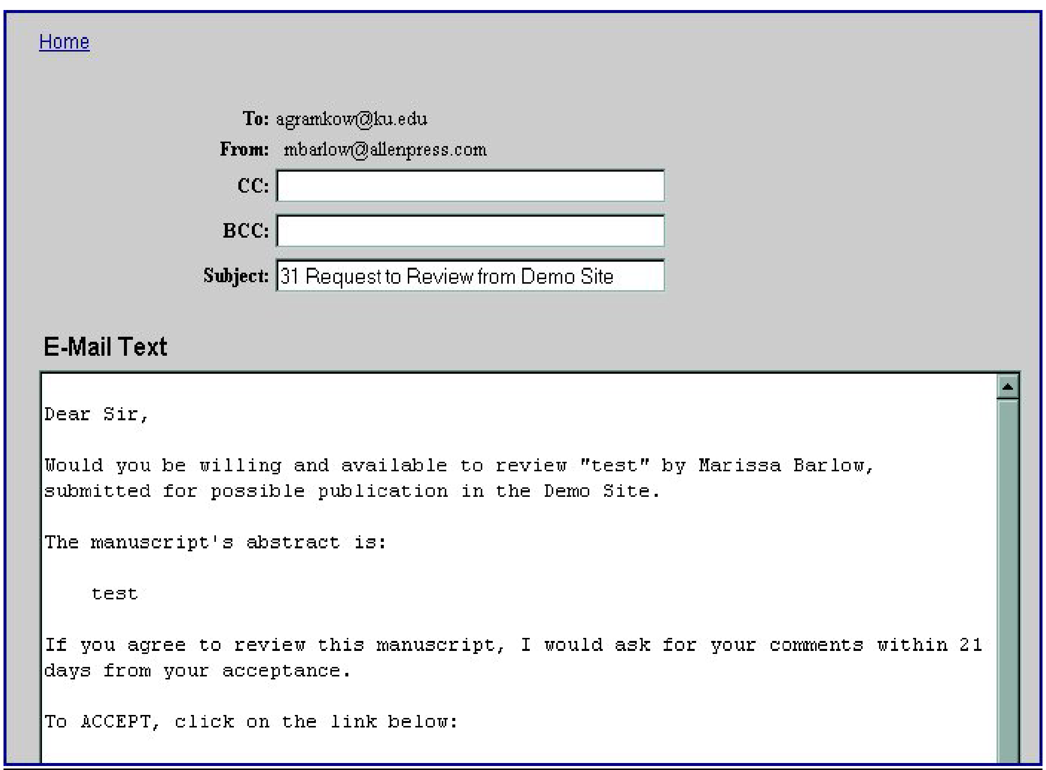
To contact potential reviewers:

- Click **Contact Potential Reviewer**
- Select the manuscript whose reviewers you wish to contact by clicking on the manuscript number link

Your reviewers have been entered into a table. On the far right hand side of the table are three columns: First Contact, Second Contact, and Third Contact. A date and time will be filled in for each time that an e-mail has been sent out to the Potential Reviewer for this manuscript.

In some cases, the system has been configured to automatically contact the first set of Potential Reviewers and subsequent Potential Reviewers if one declines.

- To send the first invite to the reviewer select one of the following:
  - **Send Email** – the invite email will automatically be sent without you seeing it
  - **Modify Email** – the email opens into a different window for you to view and modify as wished



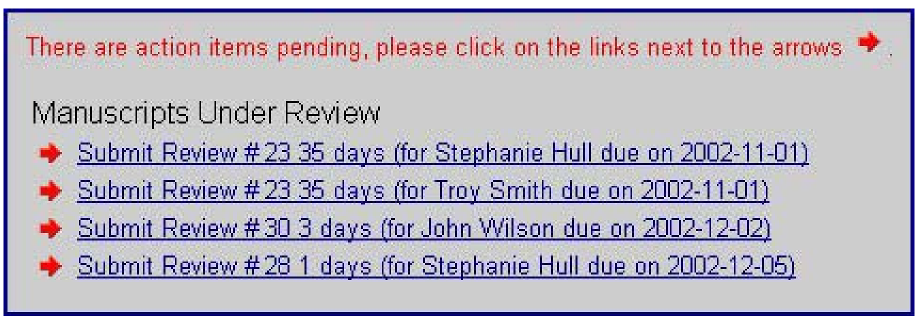
You will need to repeat this for each reviewer you have assigned. You can send up to three invites through the system.

Potential Reviewers will receive instructions on how to accept/decline via the Web system within the invitation e-mail. If you have talked to the Potential Reviewer (by telephone) and they have indicated you should accept or decline on their behalf (for some reason they can not get to a computer and perform this task) you may click on the Accept or Decline link to register their intention.

If a Potential Reviewer is indecisive and does not promptly reply to the invitation e-mail, you can send out addition invitations as necessary. Three invitations per Potential Reviewer, per manuscript are allowed.

Next folder: while you are waiting for the Potential Reviewers to Accept or Decline, the manuscript will remain in the **Contact Potential Reviewer** folder. If the Potential Reviewers are late, the system will prompt you to invite them (again) via red arrows. Once desired number of Reviewers has been received, the manuscript will move in to the **Under Review** folder.

Next folder: while you are waiting for reports to come back from reviewers, the manuscript will remain in the **Under Review** folder.



If reviews are late, the manuscript will also enter the **Chasers** folder.

Once <u>all</u> reviews have been received, the manuscript will move in to the **Awaiting Editor Decision** folder.

Editor: how to reject a manuscript without review

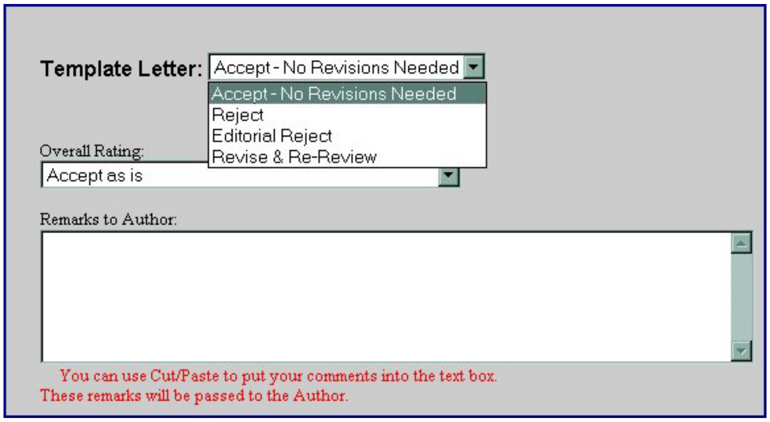
Workflow folders: **Awaiting Reviewer Assignment** and **Editor Decision**

If you wish to reject a manuscript with out taking any other action on it, you can do this from the **Awaiting Reviewer Assignment** folder.

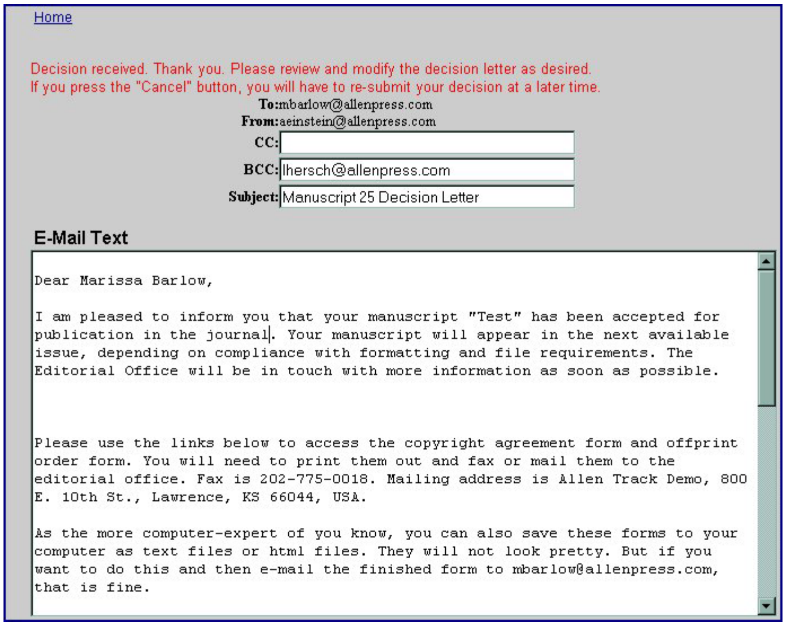
- Click on **Awaiting Reviewer Assignment**
- Select the manuscript you wish to assign reviewers
- Click on **Decision without Review**

You will automatically enter the **Editor Decision** folder.

- Select the relevant template letter



- Select the **Overall Rating** – this must correspond to the template letter
- Add any remarks for the author
- Click **Submit Decision**
- View/Modify the letter that you wish to be sent to the author



- Click **Send Decision to Author**

Your email will be sent to the author.

Next folder: the manuscript will move into the **Post Decision** folder.

Editor: manuscript under review

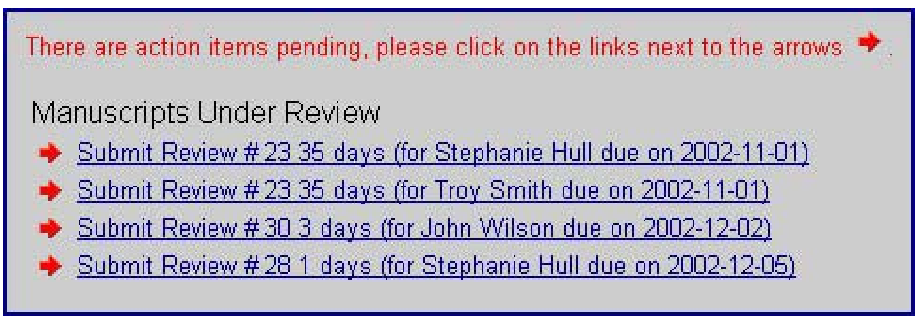
Workflow folder: **Under Review**

When a manuscript is awaiting report(s) back from reviewers the manuscript will be stored in the **Under Review** folder.

The manuscript will remain in the **Under Review** folder until reports have been received from all of the reviewers secured to review a manuscript. However, if you have received some but not all of the reviewers' reports and are happy to make your decision based on this, you can override this from here and move the manuscript directly into the **Awaiting Editor Decision** folder.

To make a decision on a manuscript before all the reviewers' reports have been received:

- Click **Under Review**



- Select the manuscript number (this will also contain the name of the reviewer for this manuscript)
- Click **Editor Decision (x received/y assigned)**

This will take you to the **Awaiting Editor Decision** folder.

From the **Under Review** folder you are also able to submit the review as a proxy reviewer.

Next folder: while you are waiting for the reviewers' reports to come back, the manuscript will be stored in the **Under Review** folder. If the reports are late, the manuscript will also appear in the **Chasers** folder. Once all of the reviewers' reports have been received, the manuscript will move into the **Awaiting Editor Decision** folder.

Editor: how to chase a reviewer

Workflow folder: **Chasers**

When a report is late, you will be required to chase the reviewer. The manuscript will be stored in both the **Under Review** folder and the **Chasers** folder. Some journals assign this task to the Associate Editor (3-tier) a Staff person.

To chase a reviewer for their report:

- Click **Chasers**
- Select the manuscript whose reviewer you wish to chase

Each reviewer for this manuscript will be entered into a table where you will be able to see the start date, due date, report receipt date (if received) and the next chase date. You will also see links to send the pre-due chaser, chase # 1, 2 and 3 by email.

Chase	Reviewer	Start Date	Due Date	Received	Next Chase Date	Pre-Due Chaser	Chaser #1	Chaser #2	Chaser #3
➔	Troy Smith (Allen Press) 785-843-1235	2002-10-11	2002-11-01		2002-10-30	Email	Email	Email	Email
➔	Stephanie Hull (University of Kansas)	2002-10-11	2002-11-01	View Partial Review	2002-10-30	Email	Email	Email	Email

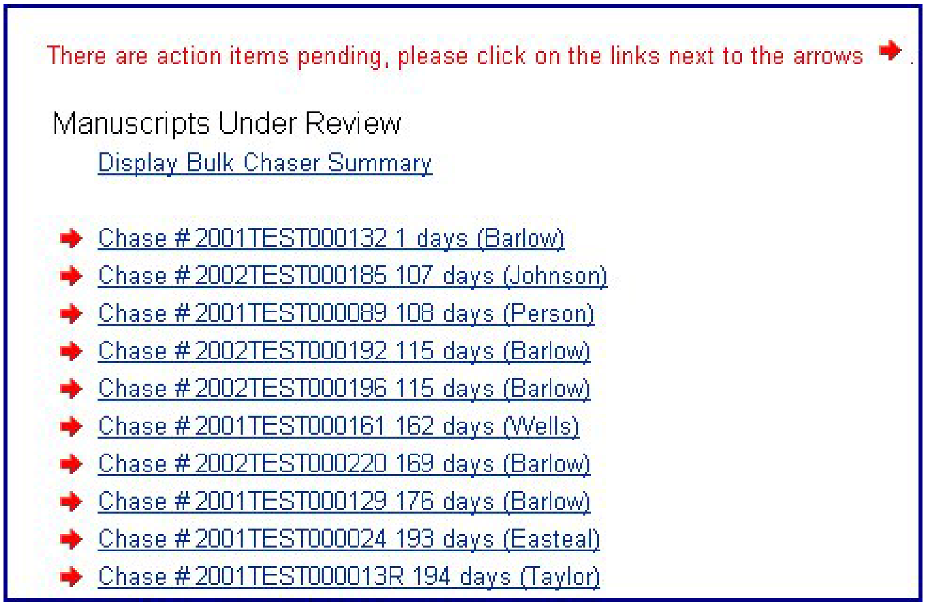
A red arrow next to a particular reviewer will indicate that a chase needs to be sent.

To send email chases:

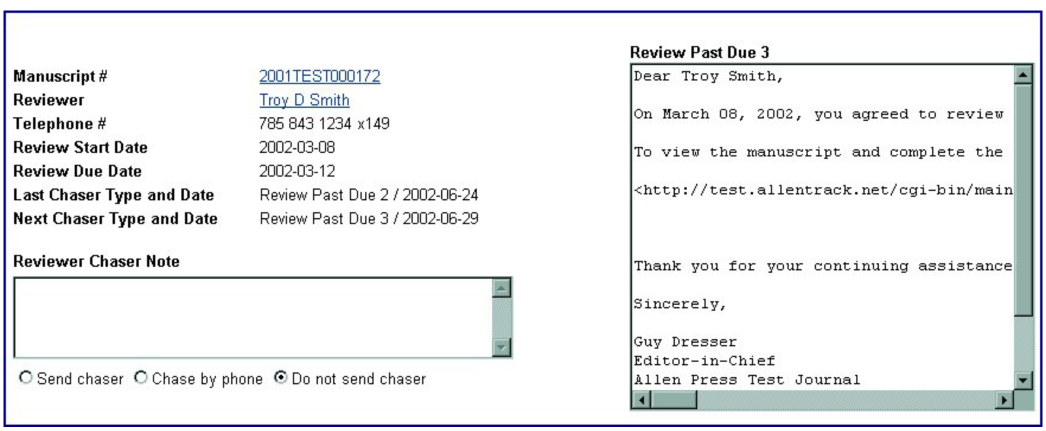
- Click on **Pre-due Chaser** (optional)
- Click on **Chaser # 1**
- Click on **Chaser # 2**
- Click on **Chaser # 3**
- View/Modify the email
- Click **Send**

Alternatively you can send out all due chasers for all manuscripts. You also do this from the **Chasers** folder.

- Click on **Chasers**
- Click on **Display Bulk Chaser Summary**

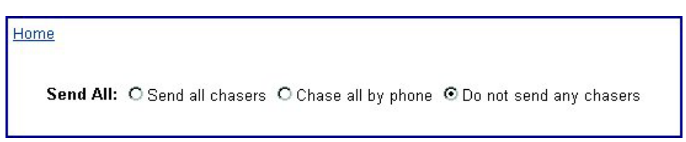


You will be given information about the manuscript, such as the manuscript number, reviewer, telephone number, review start and due dates, last and next chaser type and date. You will also be able to view the chasers notes field and the chaser email, so that you can modify the email as necessary.



At the top of the screen you are given options to act on <u>all chasers</u> displayed in this folder:

- Send all chasers
- Chase all by telephone
- Do not send any chasers



Alternatively you can act on individual chasers in this folder by selecting the individual options under the notes field:

- Send chaser
- Chase by telephone
- Do not send chaser

Once you have selected the option(s) you require, click 

at the bottom of the screen.

Next folder: when a chase has been sent and no other chases are required, the manuscript disappears from the **Chasers** folder and will be stored in the **Under Review** folder. The manuscript will re-enter the **Chasers** folder if another review duration has been reached and the report still has not been received. When all the reviewers' reports have been received, the manuscript will move into the **Awaiting Associate Editor Recommendation** or **Awaiting Editor Decision** folder.

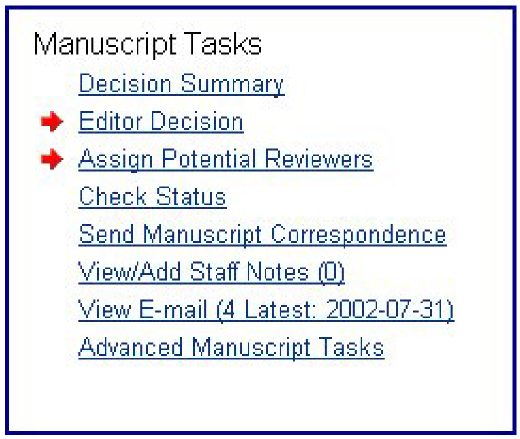
Editor: how to make a decision on a manuscript

Workflow folder: **Awaiting Editor Decision**

After a recommendation has been made for a manuscript, the manuscript will move into the **Awaiting Editor Decision** folder.

To make a final decision on a manuscript:

- Click on **Awaiting Editor Decision**
- Select the manuscript you wish to make a decision on by clicking on the manuscript number link
- Click on **Editor Decision**



Depending on the route that the manuscript has taken, you will be able to view the reviewers' reports, comments, and the recommendation made. Enter any comments you would like to include in the decision letter. Select a decision and a letter. Decisions and letters are linked, so you must select corresponding items or you will be directed to go back and make a change. If you discover letters and decisions don't match your current workflow, contact Support for help and you will receive assistance to add new letters or Support can modify the decision types.

If you are happy to send the decision to the author at this stage, without performing any additional tasks:

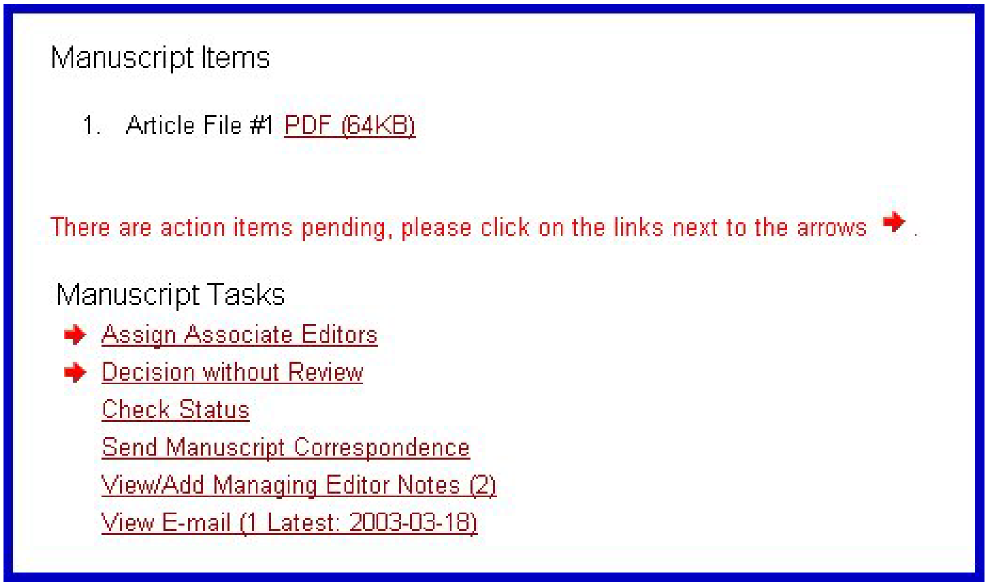
- Fill in any remarks to the author
- Make sure to choose an appropriate template letter
- Select an **overall rating**
- Click **Submit Decision**
- View/Modify the letter
- Click **Send Decision to Author**

Depending on your workflow, letters may go into the Send Decisions to Author folder on the Staff desktop so a Staff person can add additional information to the letter and/or attach files to the letter.

Next folder: once you have made a decision concerning the manuscript, it will now move into the **Decisions Ready for Author** or **Post Decision** folder.

Editor: Making a decision without review or before all reviews are in

At some point you may wish to make a decision concerning a manuscript without review or before all requested reviewers have finished reviewing the manuscript. To do so, first find the manuscript using **Check Manuscript Status** or **All Pending Manuscripts**. Click the link to the manuscript and scroll down to see the links under Manuscript Tasks.


Manuscript Items

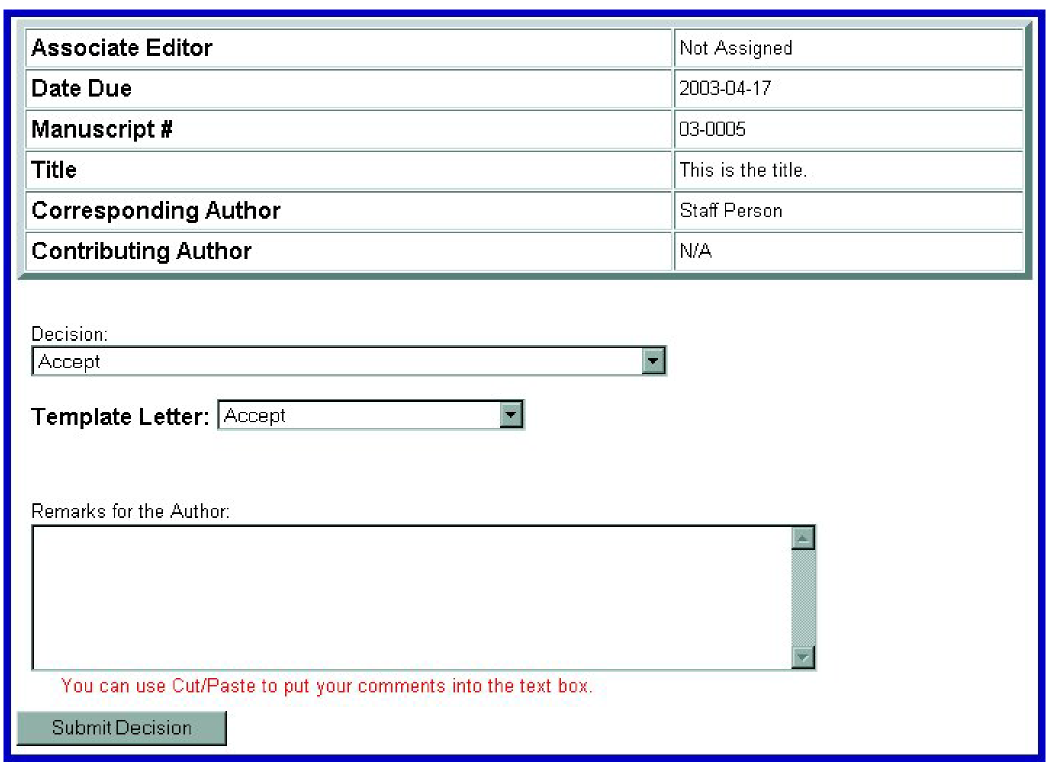
1. Article File #1 PDF (64KB)

There are action items pending, please click on the links next to the arrows .

Manuscript Tasks

- Assign Associate Editors
- Decision without Review
- Check Status
- Send Manuscript Correspondence
- View/Add Managing Editor Notes (2)
- View E-mail (1 Latest: 2003-03-18)

Click on Decision without Review to view the decision form.



Associate Editor	Not Assigned
Date Due	2003-04-17
Manuscript #	03-0005
Title	This is the title.
Corresponding Author	Staff Person
Contributing Author	N/A

Decision:
Accept

Template Letter: Accept

Remarks for the Author:

You can use Cut/Paste to put your comments into the text box.

Submit Decision

SAMPLE VIEW: Your decision form may look slightly different.

If one or more reviews have already been submitted for the manuscript, the link under Manuscript Tasks will say Editor or Editor in Chief Decision (X reviews received/Y reviews requested). You may make a decision at any time, but the task will not have a red arrow.

Manuscript Items

1. Article File #1 PDF (86KB)

There is an action item pending, please click on the link next to the arrow .

Manuscript Tasks

- Review Manuscript
- Reviewer Instructions
- Editor in Chief Decision (1 review received / 2 reviewers assigned)
- Check Status
- Send Manuscript Correspondence
- View/Add Managing Editor Notes (0)
- View E-mail (11 Latest: 2003-03-18)

You will be able to see the evaluations and comments from any reviewer who has already submitted their review.

Editor in Chief's Overall Assessment

Associate Editor	D. Coats
Date Due	2003-04-17
Manuscript #	03-0003
Title	test
Corresponding Author	Anna Gramkow
Contributing Author	N/A

Evaluations

	Role	Recommendation	Quality of Science	Significance of Science
rev one	Reviewer #1	Accept	5-High	5-High

Reviewer Rankings

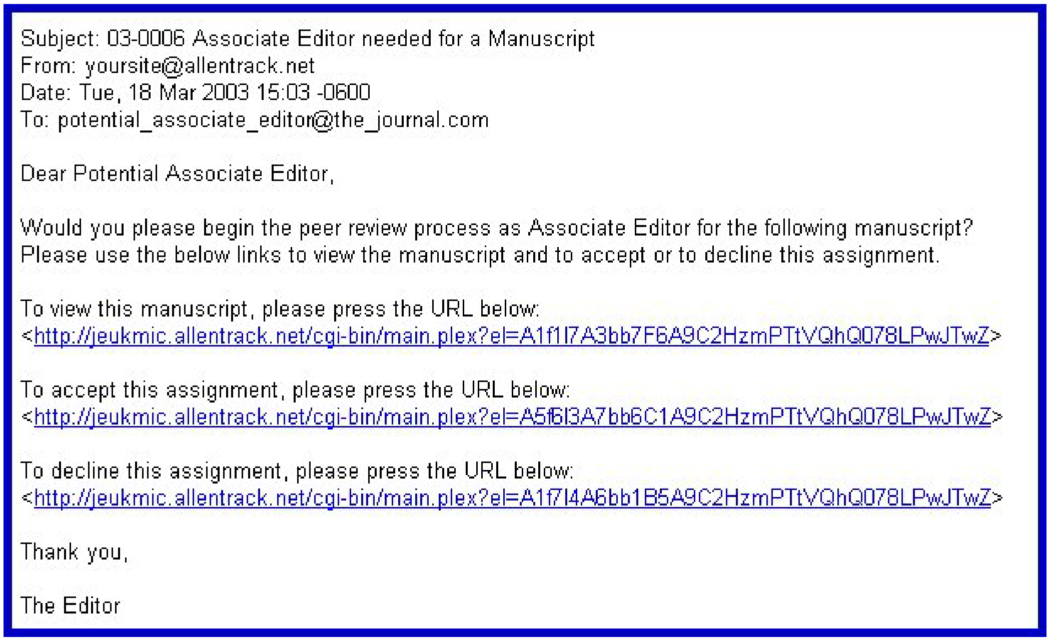
Name	Role	Ranking
rev one	Reviewer #1	Please Select

rev one's Notes (Reviewer #1)

Note	Comment	Send to Author
Remarks for the Associate Editor	These are the confidential remarks for the Associate Editor.	

Associate Editor: how to accept or decline an assignment

Your journal may allow Potential Associate Editors to accept or decline an assignment. If the journal for which you are an Associate Editor allows you to decline an assignment you will receive an email asking if you wish to accept or decline the assignment. You may click the appropriate link to register your decision.


Subject: 03-0006 Associate Editor needed for a Manuscript
From: yoursite@allentrack.net
Date: Tue, 18 Mar 2003 15:03 -0600
To: potential_associate_editor@the_journal.com

Dear Potential Associate Editor,

Would you please begin the peer review process as Associate Editor for the following manuscript?
Please use the below links to view the manuscript and to accept or to decline this assignment.

To view this manuscript, please press the URL below:
<http://jeukmic.allentrack.net/cgi-bin/main.plex?el=A1f1I7A3bb7F6A9C2HzmPTtVQhQ078LPwJTwZ>

To accept this assignment, please press the URL below:
<http://jeukmic.allentrack.net/cgi-bin/main.plex?el=A5f6I3A7bb6C1A9C2HzmPTtVQhQ078LPwJTwZ>

To decline this assignment, please press the URL below:
<http://jeukmic.allentrack.net/cgi-bin/main.plex?el=A1f7I4A6bb1B5A9C2HzmPTtVQhQ078LPwJTwZ>

Thank you,

The Editor

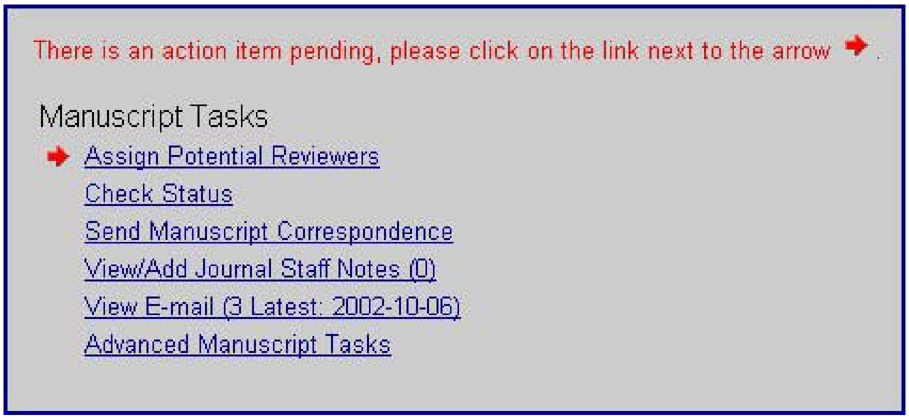
You may also accept or decline the assignment by clicking the link on your homepage.

Associate Editor: how to assign reviewers

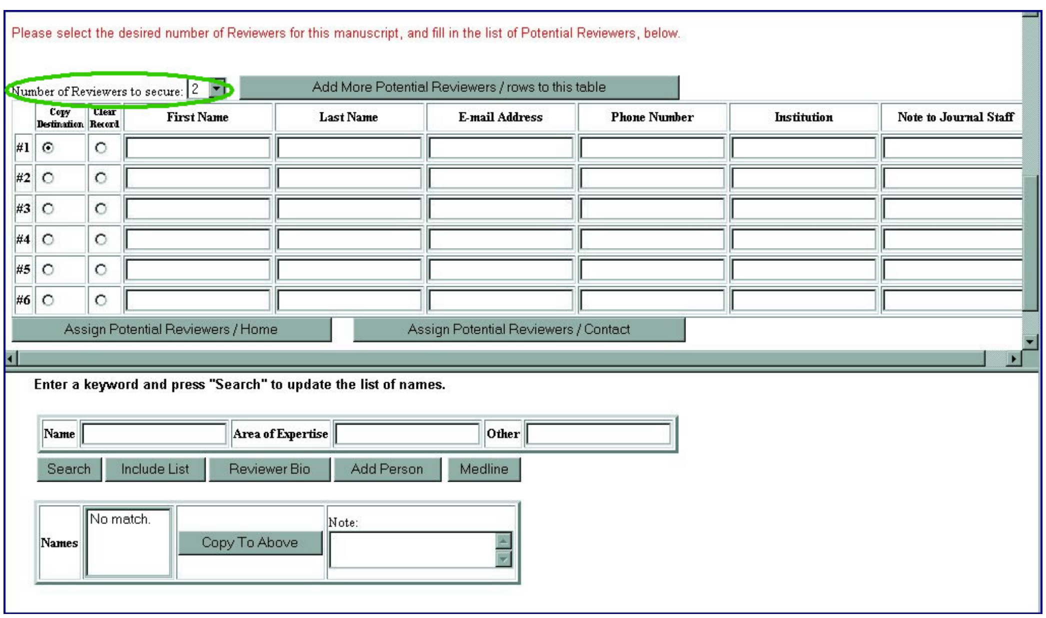
Workflow folder: **Awaiting Reviewer Assignment**

To assign reviewers to a manuscript:

- Click on **Awaiting Reviewer Assignment**
- Select the manuscript you wish to assign reviewers to by clicking on the manuscript number link
- Click on **Assign Potential Reviewers**



A split screen will now appear. The top half of the screen shows the table of assigned reviewers and also gives you the option to choose the number of reviewers to secure for the manuscript. You can change the default number of reviewers if you wish. The bottom half of the screen is where you search for individual reviewers.



- Select the **Number of Reviewers to Secure** (top half of screen; see circled object in picture above)

- Use the search fields provided to enter the details of the reviewers
    - First or Last Name
    - Area of Expertise/Keywords
    - Other
- When data has been entered in the search fields, click **Search**
    - Words divided by spaces means "AND"
    - Words preceded by ! means "NOT"
- When the results have been returned, highlight the desired reviewer
- For information about a Potential Reviewer, click on a name to highlight it:
    - **Person Bio** – this will take you to the person bio screen
    - **Medline** – PubMed site will open in a separate window
    - **Note:** - Notes about a person will appear in the box to the right
- **Include List** and **Exclude List** buttons display lists of Potential Reviewers suggested to include or exclude by the author
- When the desired reviewer is found and the name is highlighted, click **Copy to Above**

Once you have clicked copy to above, the reviewer's details will automatically enter the assignment table on the top screen. If you do not find the desired reviewer in the database, you may either enter that person's information using **Add Person** (preferred) and then search for the reviewer and **Copy to Above**, or you can enter the reviewer's information directly into the table (top half of screen).

Click **Assign Potential Reviewers/Contact** or **Assign Potential Reviewers/Home** (if a Staff person is responsible for contacting Potential Reviewers)

Next folder: **Contact Potential Reviewer**

Associate Editor: how to contact reviewers

Workflow folder: **Contact Potential Reviewer**

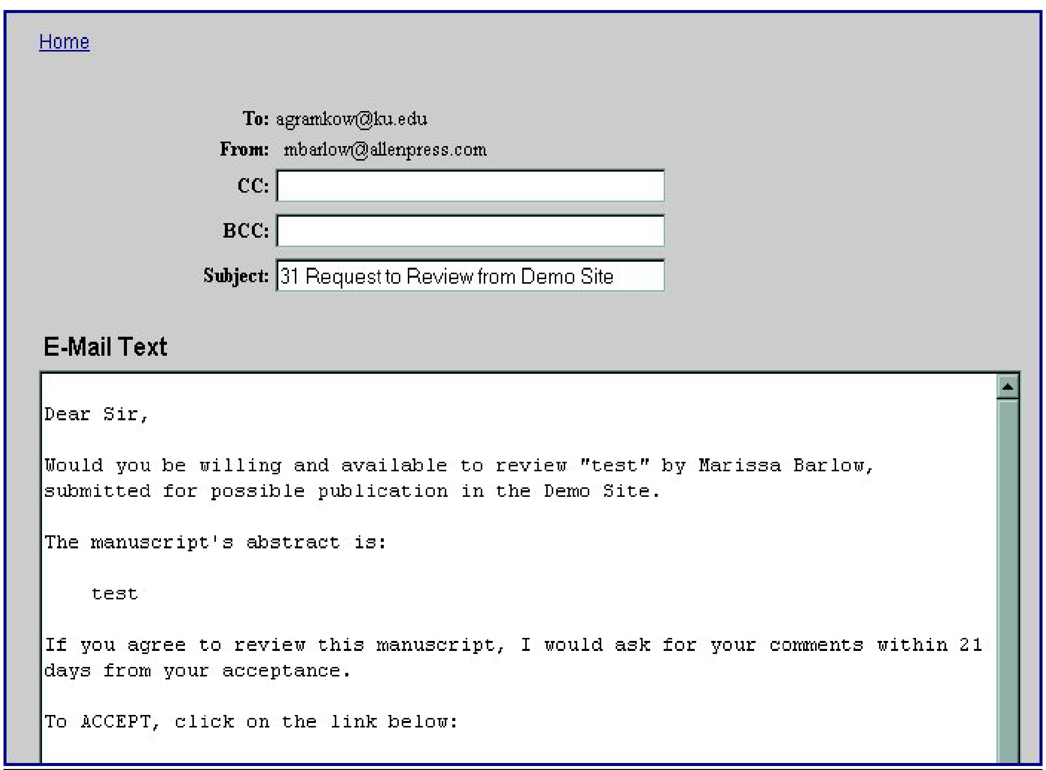
To contact potential reviewers:

- Click **Contact Potential Reviewer**
- Select the manuscript whose reviewers you wish to contact by clicking on the manuscript number link

Your reviewers have been entered into a table. On the far right hand side of the table are three columns: First Contact, Second Contact, and Third Contact. A date and time will be filled in for each time that an e-mail has been sent out to the Potential Reviewer for this manuscript.

In some cases, the system has been configured to automatically contact the first set of Potential Reviewers and subsequent Potential Reviewers if one declines. Some journals assign the contacting role to a Staff person instead of to the Associate Editor.

- To send the first invite to the reviewer select one of the following:
  - **Send Email** – the invite email will automatically be sent without you seeing it
  - **Modify Email** – the email opens into a different window for you to view and modify as wished



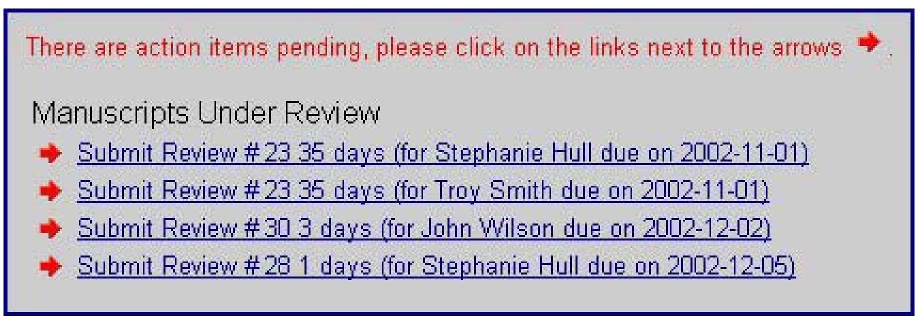
You will need to repeat this for each reviewer you have assigned. You can send up to three invites through the system.

Potential Reviewers will receive instructions on how to accept/decline via the Web system within the invitation e-mail. If you have talked to the Potential Reviewer (by telephone) and they have indicated you should accept or decline on their behalf (for some reason they cannot get to a computer and perform this task) you may click on the Accept or Decline link to register their intention.

If a Potential Reviewer is indecisive and does not promptly reply to the invitation e-mail, you can send out additional invitations as necessary. Three invitations per Potential Reviewer, per manuscript are allowed.

Next folder: while you are waiting for the Potential Reviewers to Accept or Decline, the manuscript will remain in the **Contact Potential Reviewer** folder. If the Potential Reviewers are late, the system will prompt you to invite them (again) via red arrows. Once the desired number of Reviewers have accepted, the manuscript will move in to the **Under Review** folder.

Next folder: while you are waiting for reports to come back from reviewers, the manuscript will remain in the **Under Review** folder.



If reviews are late, the manuscript will also enter the **Chasers** folder.

Once <u>all</u> reviews have been received, the manuscript will move in to the **Awaiting Associate Editor Recommendation** folder.

Associate Editor: how to reject a manuscript without review

Workflow folders: **Awaiting Reviewer Assignment** and **Associate Editor Recommendation**

If you wish to reject a manuscript with out taking any other action on it, you can do this from the **Awaiting Reviewer Assignment** folder.

- Click on **Awaiting Reviewer Assignment** folder
- Select the manuscript you wish to reject to by clicking on the manuscript number link
- Click on **Recommendation without Review**

You will automatically enter the **Associate Editor Recommendation** screen.

- Select the relevant recommendation and complete any desired/required comments
- Click **Submit Recommendation**

The manuscript and recommendation will be routed to the Editor.

Next folder: the manuscript will move into the **Awaiting Editor Decision** folder.

Associate Editor: manuscript under review

Workflow folder: **Under Review**

When a manuscript is awaiting report(s) back from reviewers the manuscript will be listed as **Under Review**.

The manuscript will remain **Under Review** until reports have been received from all of the reviewers secured to review a manuscript. However, if you have received some but not all of the reviewers' reports and are happy to make your recommendation based on this, you can override this from here and move the manuscript directly into the **Awaiting Editor Decision** stage.

- To make a recommendation on a manuscript before all the reviewers' reports have been received select the manuscript number from your home page
- Click **Associate Editor Recommendation (x reviews received / y reviewers assigned)**

Next folder: while you are waiting for the reviewers' reports to come back, the manuscript will be stored in the **Under Review** folder. Once all of the reviewers' reports have been received, the manuscript will automatically change to **Awaiting Associate Editor Recommendation**. If you make a recommendation, the manuscript automatically moves onto the **Editor's** desktop.

Associate Editor: how to chase a reviewer

Workflow folder: **Chasers and Under Review**

When a report is late, you may be required to chase the Reviewer. The manuscript will be stored in both the **Under Review** folder and the **Chasers** folder. Some journals assign this task to the Associate Editor (3-tier) or a Staff person. Please check with the editorial office to see if you are responsible for this step.

To chase a reviewer for their report:

- Select the manuscript whose reviewer you wish to chase

Each reviewer for this manuscript will be entered into a table where you will be able to see the start date, due date, report receipt date (if received) and the next chase date. You will also see links to send the pre-due chaser, chase # 1, 2 and 3 by email.

Chase	Reviewer	Start Date	Due Date	Received	Next Chase Date	Pre-Due Chaser	Chaser #1	Chaser #2	Chaser #3
➔	Troy Smith (Allen Press) 785-843-1235	2002-10-11	2002-11-01		2002-10-30	Email	Email	Email	Email
➔	Stephanie Hull (University of Kansas)	2002-10-11	2002-11-01	View Partial Review	2002-10-30	Email	Email	Email	Email

A red arrow next to a particular reviewer will indicate that a chase needs to be sent.

To send email chases:

- Click on **Pre-due Chaser** (optional)
- Click on **Chaser # 1**
- Click on **Chaser # 2**
- Click on **Chaser # 3**
- View/Modify the email
- Click **Send**

Next folder: the manuscript automatically moves the **Awaiting Editor Decision** folder when the Reviewers complete their reviews

Associate Editor: make manuscript recommendation after review

Workflow folder: Awaiting Associate Editor Recommendation

When a manuscript is has been reviewed by the required number of reviewers to secure, the manuscript will appear as a link on the Associate Editor's desktop as **Draft Recommendation**.

You will be able to see the evaluations and comments from any reviewer who has already submitted their review.

Answer the questions posed in the recommendation form and select your overall recommendation. You may be asked to rate the reviewers' performance on this screen. Finally, enter comments for the Author and comments for the Editor in the appropriate spaces. Click on **Submit Recommendation**.

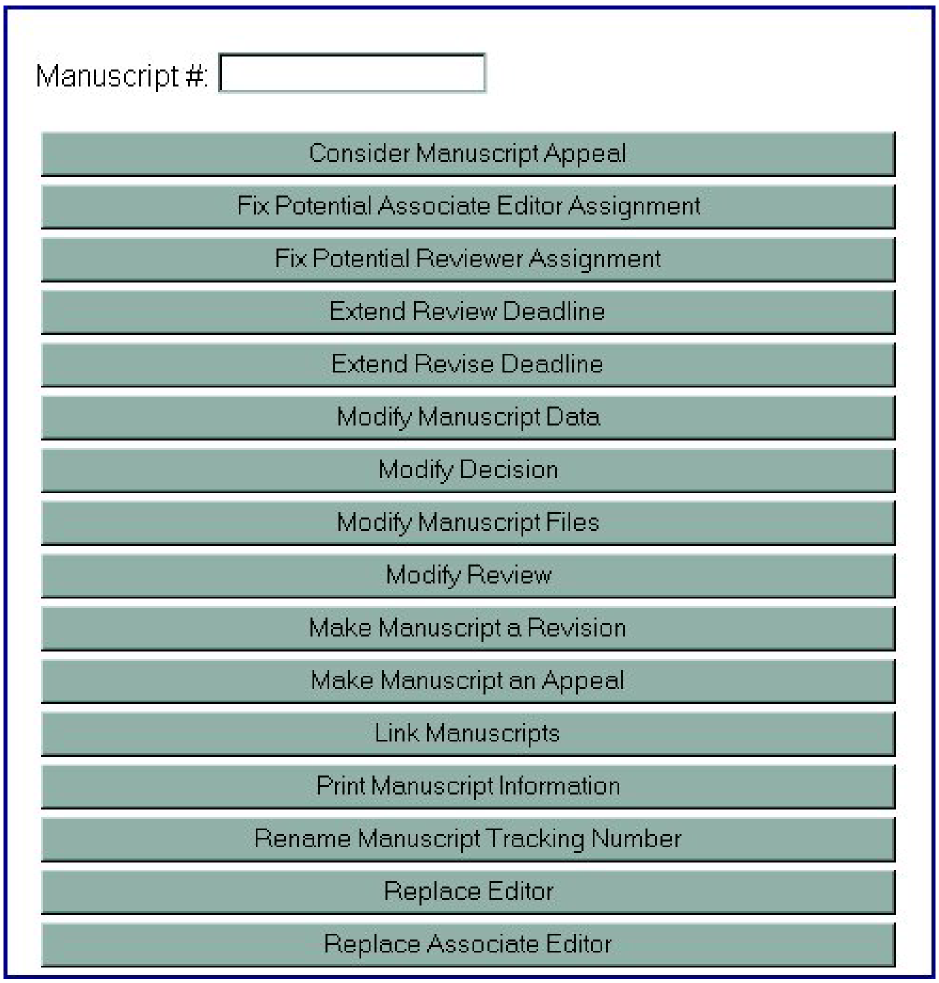
Next folder: the manuscript automatically moves the **Awaiting Editor Decision** folder

Staff: how to print a manuscript and all its correspondence

There may be times when you are required to print out a copy of the manuscript and some or all of its related correspondence.

To do this you will need to use the Advanced Manuscript Task **Print Manuscript Information**.

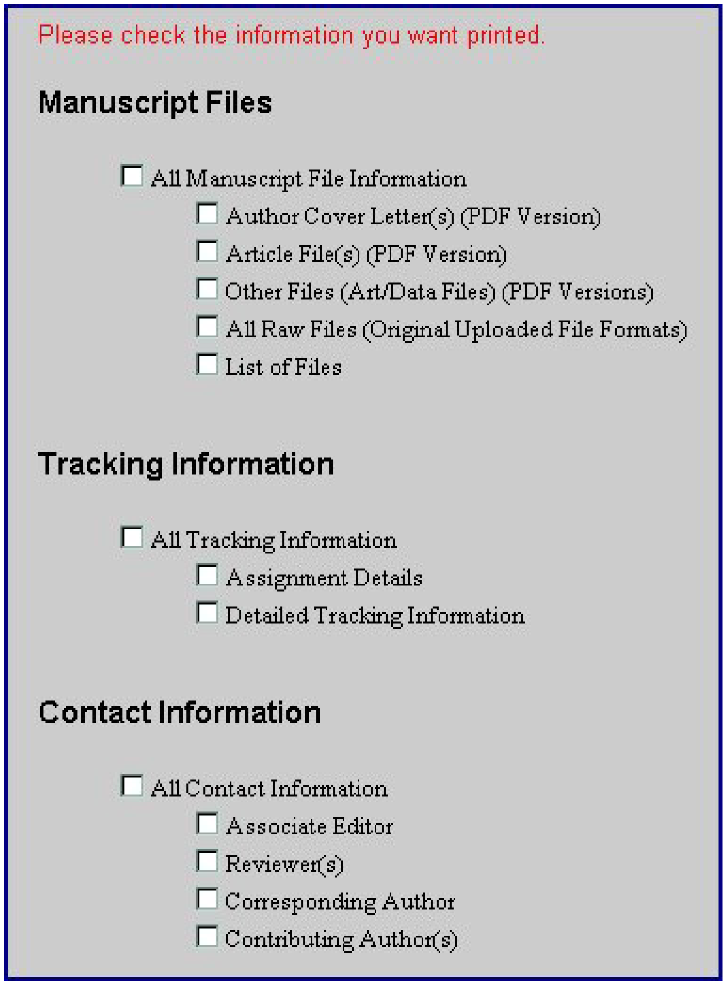
- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided
- Click on **Print Manuscript Information**



If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

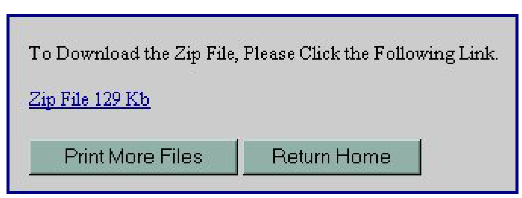
- Scroll down to the list at the bottom
- Select the information you want to print
    - Manuscript Files
    - Tracking Information
    - Contact Information

- Emails/Notes/Reviews
- Print All Files



- Click on **Print Files**

This will create a zip file.



- Click on the zip file to download the files
- Select whether you wish to:
  - Open this file from its current location – will open automatically
  - Save this file to disk – will need to be manually opened from where you save it
- When download is complete, click **Close**
- Double click on each individual file to print

Staff: how to contact Potential Associate Editors

Workflow folder: **Contact Potential Associate Editor**

*** This folder is only present on multi-Associate Editor workflows/journals.
*** This folder may not be present if the journal/workflow is configured to force the first Associate Editor to manage the paper.

To contact potential Associate Editor:

- Click **Contact Potential Associate Editor** folder
- Select the manuscript whose Potential Associate Editor you wish to contact by clicking on the manuscript number link

The Potential Associate Editors have been entered into a table. On the far right hand side of the table are three columns: First Contact, Second Contact, and Third Contact. A date and time will be filled in for each time that an e-mail has been sent out to the Potential Associate Editor for this manuscript.

In some cases, the system has been configured to automatically contact the first Potential Associate Editor and subsequent Associate Editors if the first one declines.

- To manually send the first invitation to the Potential Associate Editors select one of the following:
  - **Send Email** – the invite email will automatically be sent without you seeing it
  - **Modify Email** – the email opens into a different window for you to view and modify as wished

You can send up to three invitations through the system per Potential Associate Editor. If you have talked to the Potential Associate Editor (by telephone) and they have indicated to you they wish you to accept or decline on their behalf (for some reason they can not get to a computer and perform this task) you may click on the Accept or Decline link to register their intention.

Next folder: **Awaiting Reviewer Assignment**

Staff: how to submit a manuscript (proxy author)

You will be required to do this for new manuscripts that are sent in as hard copy or email. You can do this from the **Author** task folders on your homepage.

Before you can submit the manuscript you will need to prepare electronic files of all the manuscript documentation.

When you have all of your electronic files ready:

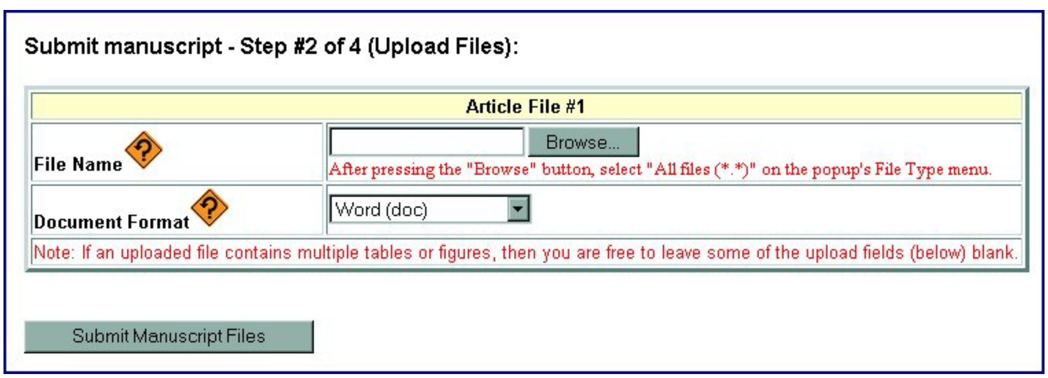
- Click on **Submit Manuscript** under the **Author** task folders on your homepage
- Read/Scroll through and click on **Continue**

You will be taken to **step 1 of 4** of the submission process. This is the manuscript submission form.

The first line of the submission form asks if you are the Corresponding Author. Select No. Search for Author information by entering the last name of the Author and click on the Find Person button. If the Author is found, you can click on **Copy Person Info into Form** to automatically fill in the Author's information. If the Author's information is not found, you may **Add Person** and then search for the person again or you may enter the Author's information directly into the submission form.

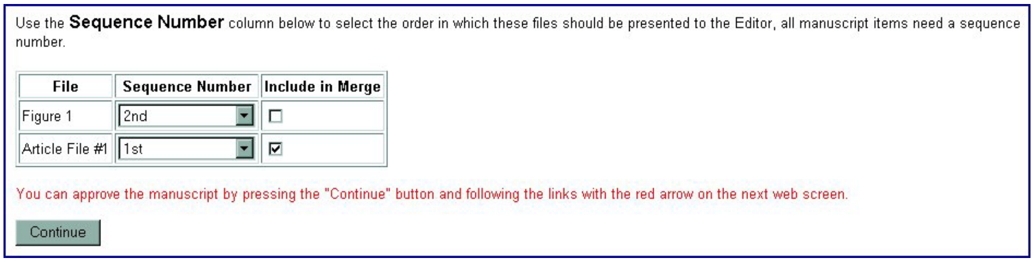
- Enter all of the details that you have. The fields marked with (*) are required fields.
- The abstract can be cut and pasted from your electronic files, where applicable
- Click **Save and Continue** when you have entered your details.

You will now be taken to **step 2 of 4** of the submission process. This is the file upload screen.



- Using **Browse** find the manuscript files
- Select the **Document Format**
- For figures, tables, and supplementary information, you can select a **File Title**
- Click on **Submit Manuscript Files**

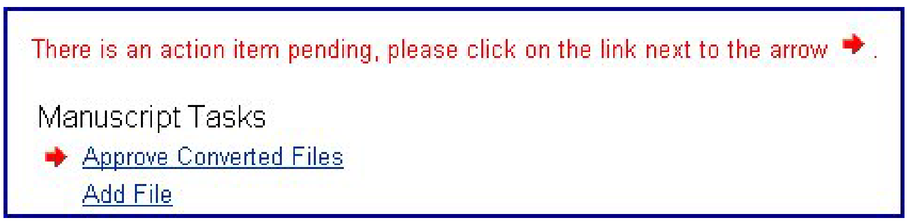
You will now be taken to **step 3 of 4** of the submission process. This is where you receive the manuscript number and create the merged PDF.



SAMPLE VIEW: Your configuration may present a slightly different view.

- Select the **Sequence Number** for the files – this corresponds to the order at which the files will be presented to the editor
- Select which files you wish to be **Included in Merge**
- Click **Continue**

You will now be taken to **step 4 of 4** of the submission process. This is where you view the conversions and approve the files.



- Check that the files have converted properly and print if necessary
- If not all files have converted click on **Check for Completion of File Conversion**
- If all of the files have converted click on **Approve Converted Files**

You may assign a login and password to the Corresponding Author and ask the Author to login and approve the files (**Send Manuscript Correspondence**). When the Corresponding Author logs in, a link with a red arrow will appear under **Author Tasks** that directs the Author to the manuscript to **Approve Converted Files**.

Staff: how to submit a revised manuscript

When an editor has requested a revised version of a manuscript, a link to this manuscript will remain in the **Waiting for Revision** folder.

To submit a revised manuscript:

- Click on the **Waiting for Revision** folder
- Select the manuscript of which you wish to submit the revision
- Click on **Revise Manuscript**
- Read/scroll through and click on **Continue**

You will be taken to **step 1 of 4** of the submission process. This is the manuscript submission form.

- Enter all of the details that you have. The fields marked with (*) are required fields.
- The title will be filled in automatically
- The abstract can be cut and pasted from your electronic files, where applicable
- Click **Save and Continue** when you have entered your details.

You will now be taken to **step 2 of 4** of the submission process. This is the file upload screen.

- Using **Browse** find the manuscript files
- Select the **Document Format**
- For figures, supplementary information, pre-prints and videos you can select a **File Title**
- Click on **Submit Manuscript Files**

You will now be taken to **step 3 of 4** of the submission process. This is where you receive the manuscript number and create the merged PDF.

- Select the **Sequence Number** for the files – this corresponds to the order at which the files will be presented to the editor
- Select which files you wish to be **Included in Merge**
- Click **Continue**

You will now be taken to **step 4 of 4** of the submission process. This is where you view the conversions and approve the files.

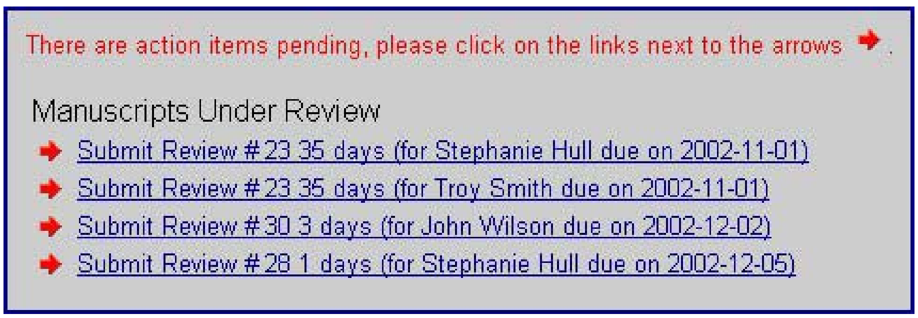
- Check that the files have converted properly and print if necessary
- If not all files have converted click on **Check for Completion of File Conversion**
- If all of the files have converted click on **Approve Converted Files**

Staff: how to submit an emailed reviewer report (proxy reviewer)

You may be required to act as a proxy reviewer and enter a reviewer report into the system from an email, fax or attachment.

You can use the folder **Under Review** to see what the reviewer would see and submit the review for them.

- Click on the **Under Review** folder
- Find the manuscript and the correct reviewer whose review you wish to submit. The information will be displayed as 'submit review # 52 22 days (for Smith due on 07-07-02')



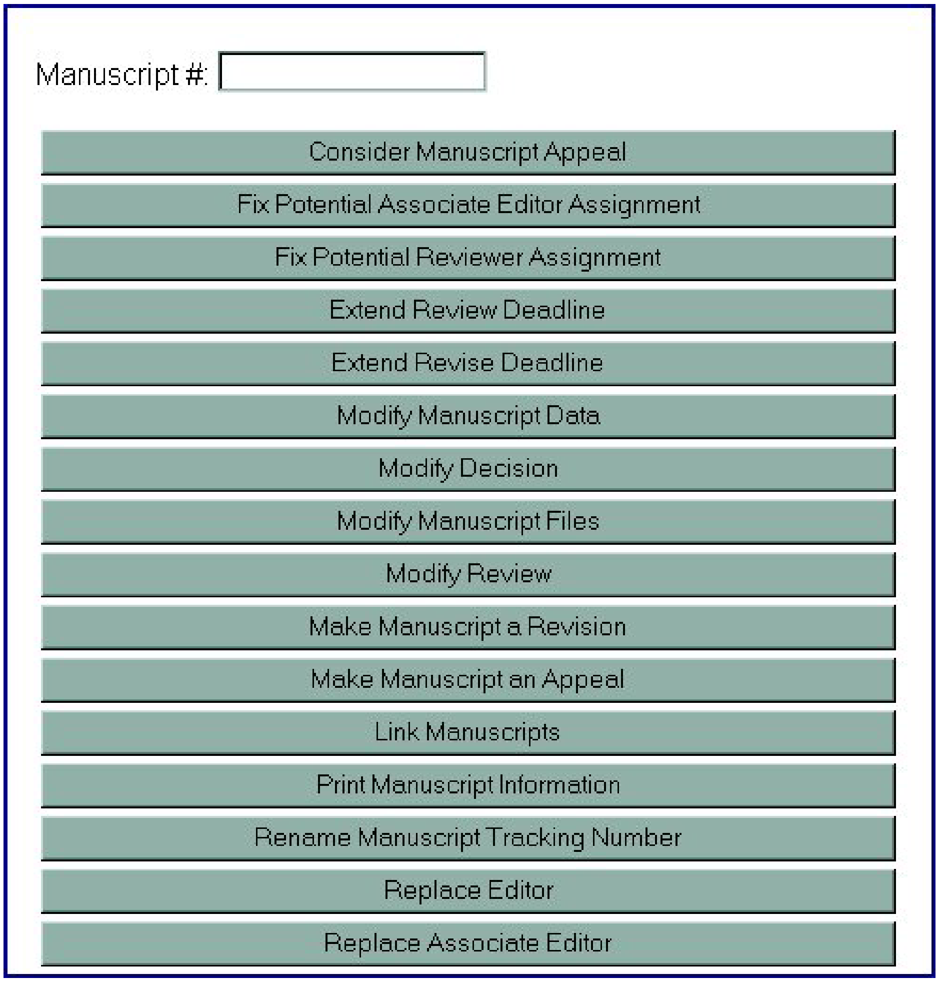
- Click on **Review Manuscript**
- Enter the **Confidential Remarks** that the reviewer wishes only the Staff/Editors to see.
- Enter the **Remarks to be Sent to Author**
- Click on **Submit Recommendation**

The manuscript will now proceed as if the reviewer had submitted the report. If this was the last report to be 'received', the manuscript will move on to the next stage.

Staff: how to edit a review

When a review is submitted, occasionally the comments are not appropriate for the author to see. You can manually modify the review before the author sees it by using the Advanced Manuscript Task **Modify Review**.

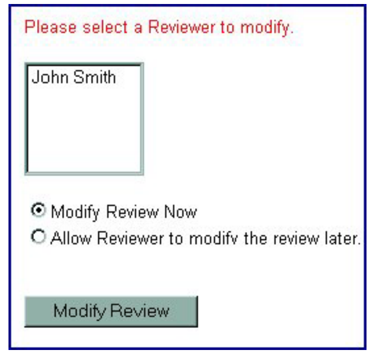
- Click on **Advanced Manuscript Tasks**



- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Modify Review**

If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

* Highlight the reviewer whose review you wish to modify



Then choose one of the following options:

* Select **Allow Reviewer to Modify the Review Later** to make a link to review the manuscript appear on the reviewer's homepage. The original comments are stored so the reviewer will only need to modify these comments as opposed to totally writing new ones.
* Select **Modify Review Now** to make any modifications yourself

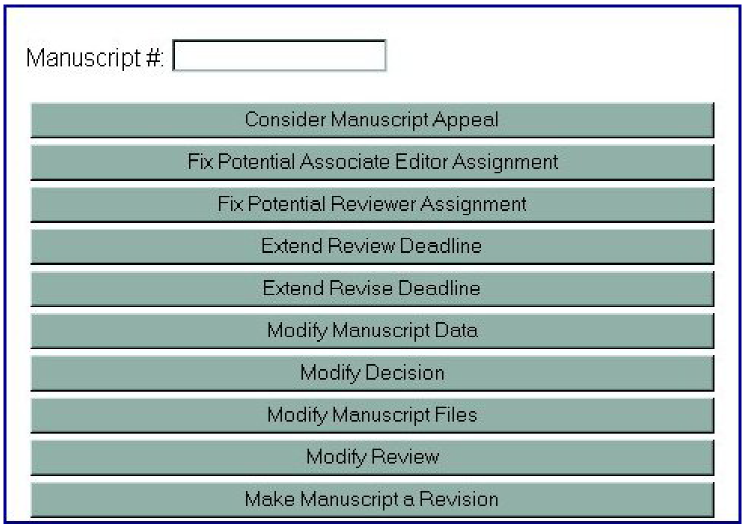
If you choose to make modifications the original review comments will be displayed to you.

* Make necessary modifications
* Click **Submit Recommendation**

Staff: how to make a new manuscript a revised manuscript

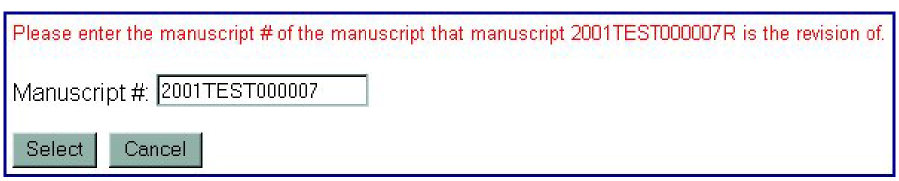
If an author has re-submitted a revision as a new manuscript, you can register this manuscript as the revision and alter the manuscript number using the Advanced Manuscript Task **Make Manuscript a Revision**.

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Make Manuscript a Revision**



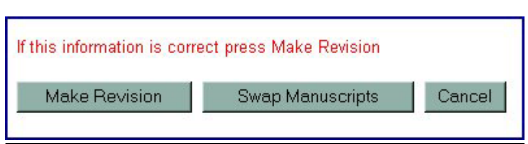
If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

- Enter the manuscript number of the manuscript that this is a revision of
- Click **Select**



You will be able to view both of the manuscripts to make sure that you have selected the correct manuscripts.

- If the information is correct, click **Make Revision**
- If the information is correct but you have selected them in the wrong order, click **Swap Manuscripts**
- If the information is incorrect, click **Cancel**



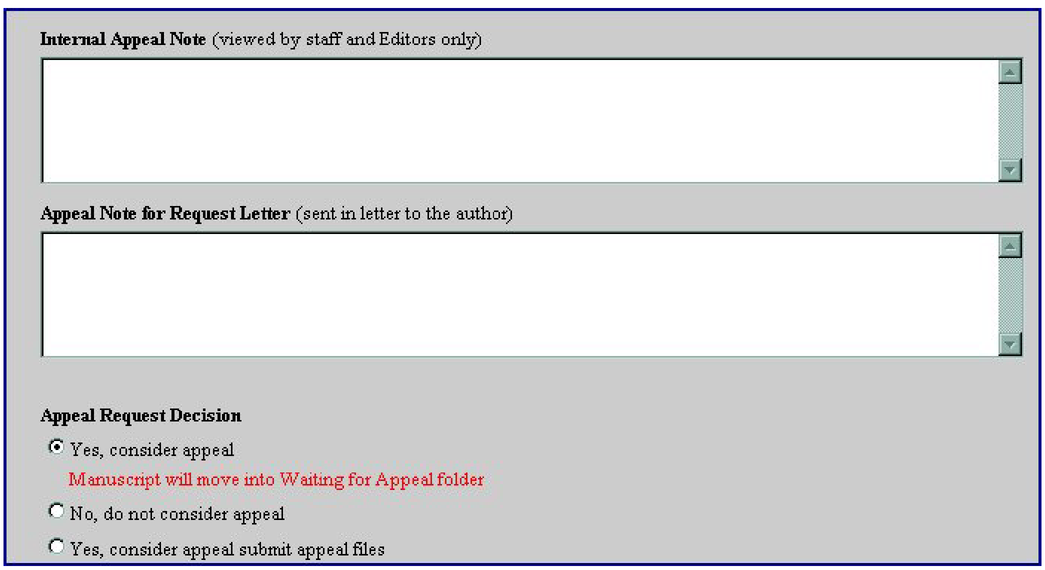
Staff: how to make a manuscript an appeal

When an appeal has come in via email/telephone call you can store the letter of appeal and either accept or decline the appeal.

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Consider Manuscript Appeal**

If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

- Enter the confidential editor's comments in the space provided for **Internal Appeal Note**
- Enter the editor's comments that are to appear in the appeal letter in the space provided for **Appeal Note for Request Letter**


Internal Appeal Note (viewed by staff and Editors only)

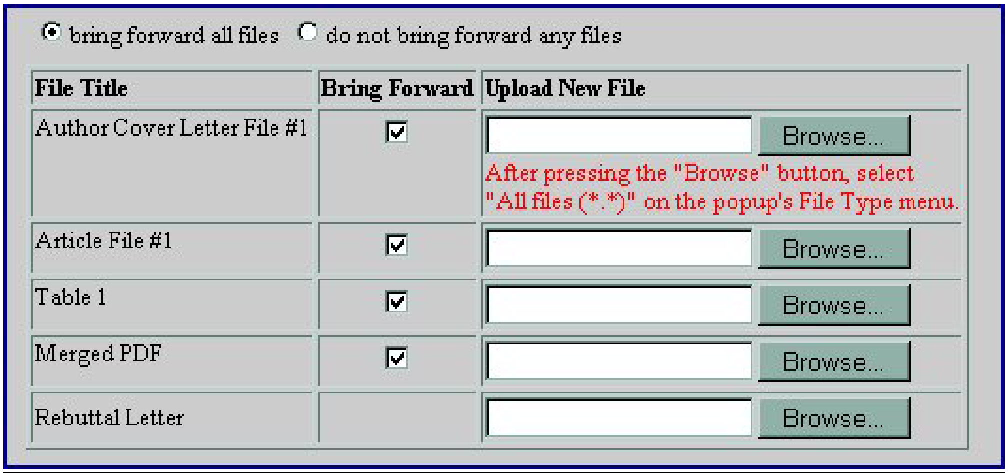
Appeal Note for Request Letter (sent in letter to the author)

Appeal Request Decision

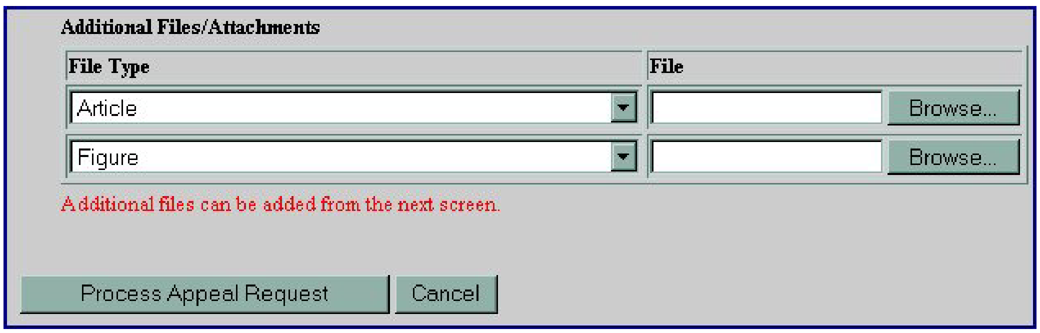
- (•) Yes, consider appeal
  Manuscript will move into Waiting for Appeal folder
- ( ) No, do not consider appeal
- ( ) Yes, consider appeal submit appeal files

Depending on the editor's decision, mark one of the following:

- **Yes, consider appeal** – the manuscript will move to the **Waiting for Appeal** folder and a link to resubmit a revision will appear on the author's desktop
- **No, do not consider appeal** – the manuscript will stay at the current stage
- **Yes, consider appeal, submit files** – if the author wishes an appeal to be decided on the previous manuscript files you can select to bring forward the previous files, or alternatively you can upload the files yourself by selecting **do not bring forward any files**)



- Click **Process Appeal Request**



Staff: how to submit a manuscript as an appeal (proxy author)

When an editor has accepted an appeal and wants a revised version of a manuscript (as opposed to the manuscript files already in the system), a link to this manuscript will remain in the **Waiting for Appeal** folder.

- Click on **Waiting for Appeal** folder
- Select the manuscript for which you wish to submit the appeal

- Click on **Appeal Manuscript**
- Read/scroll through and click on **Continue**

You will be taken to **step 1 of 4** of the submission process. This is the manuscript submission form.

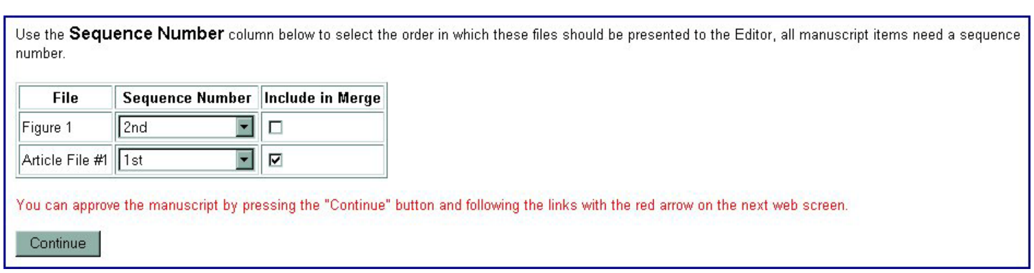
- Enter all of the details that you have. The fields marked with (*) are required fields.
- The title will be filled in automatically
- The abstract can be cut and pasted from your electronic files, where applicable
- Click **Save and Continue** when you have entered your details.

You will now be taken to **step 2 of 4** of the submission process. This is the file upload screen.

- Using **Browse** find the manuscript files
- Select the **Document Format**
- For figures, supplementary information, pre-prints and videos you can select a **File Title**
- Click on **Submit Manuscript Files**

You will now be taken to step **3 of 4** of the submission process. This is where you receive the manuscript number and create the merged PDF.

- Select the **Sequence Number** for the files – this corresponds to the order at which the files will be presented to the editor
- Select which files you wish to be **Included in Merge**
- Click **Continue**



Use the **Sequence Number** column below to select the order in which these files should be presented to the Editor, all manuscript items need a sequence number.

File	Sequence Number	Include in Merge
Figure 1	2nd	☐
Article File #1	1st	☑

You can approve the manuscript by pressing the "Continue" button and following the links with the red arrow on the next web screen.

Continue

You will now be taken to **step 4 of 4** of the submission process. This is where you view the conversions and approve the files.

- Check that the files have converted properly and print if necessary
- If not all files have converted click on **Check for Completion of File Conversion**
- If all of the files have converted click on **Approve Converted Files**

Staff: how to contact reviewers

Workflow folder: **Contact Potential Reviewer**

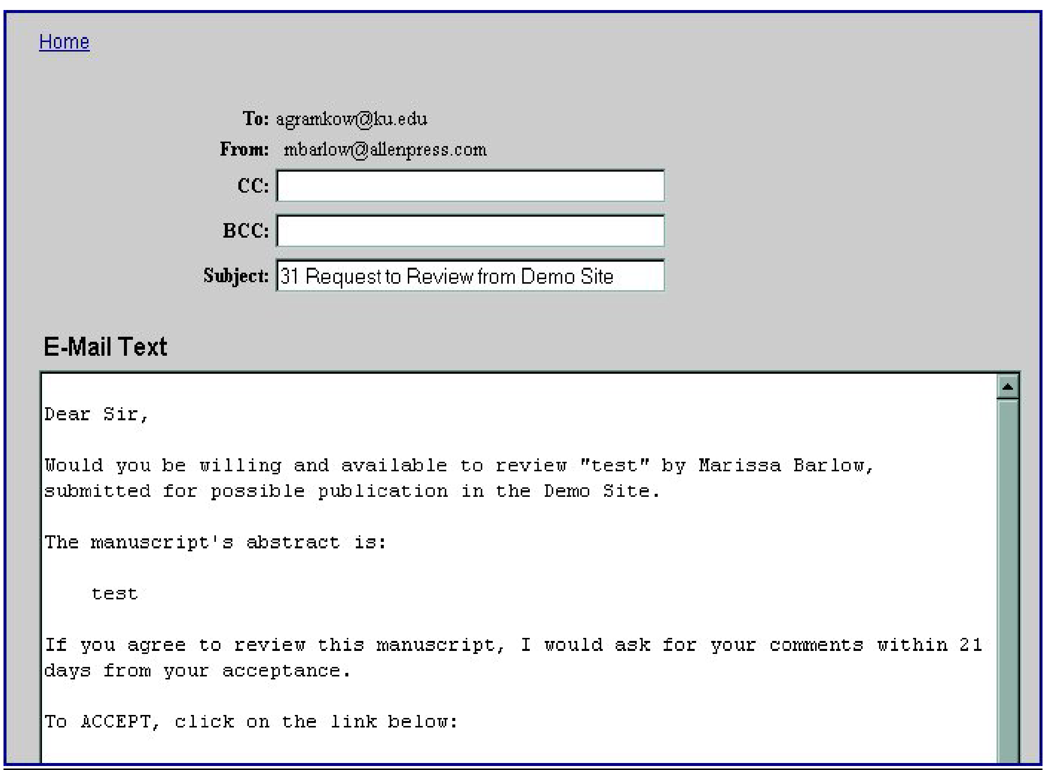
To contact potential reviewers:

- Click **Contact Potential Reviewer**
- Select the manuscript whose reviewers you wish to contact by clicking on the manuscript number link

Your reviewers have been entered into a table. On the far right hand side of the table are three columns: First Contact, Second Contact, and Third Contact. A date and time will be filled in for each time that an e-mail has been sent out to the Potential Reviewer for this manuscript.

In some cases, the system has been configured to automatically contact the first set of Potential Reviewers and subsequent Potential Reviewers if one declines.

- To send the first invite to the reviewer select one of the following:
  - **Send Email** – the invite email will automatically be sent without you seeing it
  - **Modify Email** – the email opens into a different window for you to view and modify as wished



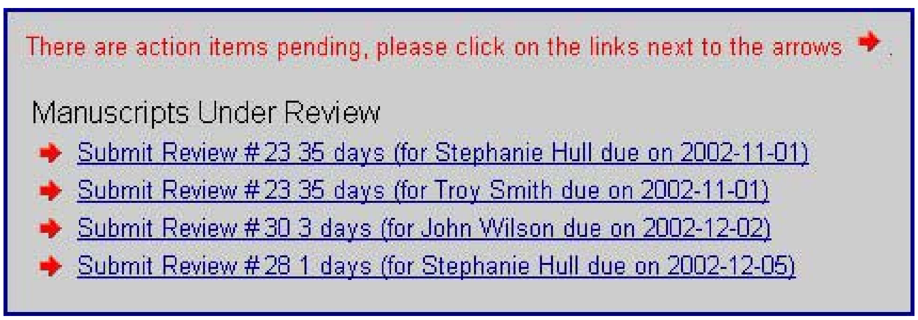
You will need to repeat this for each reviewer you have assigned. You can send up to three invites through the system.

Potential Reviewers will receive instructions on how to accept/decline via the Web system within the invitation e-mail. If you have talked to the Potential Reviewer (by telephone) and they have indicated you should accept or decline on their behalf (for some reason they can not get to a computer and perform this task) you may click on the Accept or Decline link to register their intention.

If a Potential Reviewer is indecisive and does not promptly reply to the invitation e-mail, you can send out addition invitations as necessary. Three invitations per Potential Reviewer, per manuscript are allowed.

Next folder: while you are waiting for the Potential Reviewers to Accept or Decline, the manuscript will remain in the **Contact Potential Reviewer** folder. If the Potential Reviewers are late, the system will prompt you to invite them (again) via red arrows. Once desired number of Reviewers has been received, the manuscript will move in to the **Under Review** folder.

Next folder: while you are waiting for reports to come back from reviewers, the manuscript will remain in the **Under Review** folder.



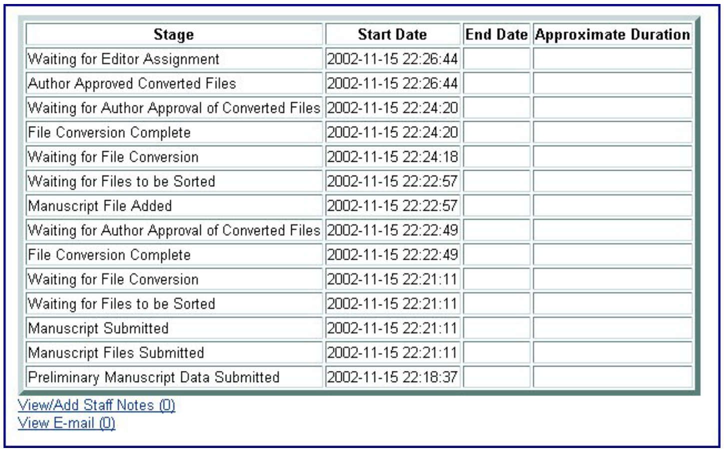
If reviews are late, the manuscript will also enter the **Chasers** folder.

Once <u>all</u> reviews have been received, the manuscript will move in to the **Awaiting Associate Editor Recommendation** or **Awaiting Editor Decision** folder.

Staff: how to add/view a manuscript general or terse note

Manuscript general notes

A manuscript general note is used to store general information about a manuscript, i.e. 'submitted with 1 x zip disk'. A general note can be entered and modified as many times as necessary. The person who enters or modifies the note will be recorded, as will the date of modification. This note can be accessed through the hyperlink **View/Add Staff Note** on the manuscript summary screen.



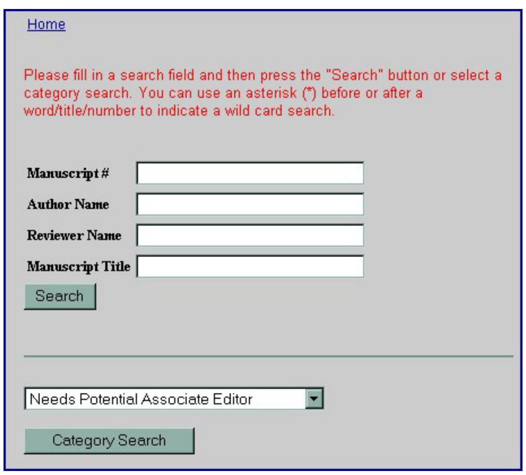
Stage	Start Date	End Date	Approximate Duration
Waiting for Editor Assignment	2002-11-15 22:26:44		
Author Approved Converted Files	2002-11-15 22:26:44		
Waiting for Author Approval of Converted Files	2002-11-15 22:24:20		
File Conversion Complete	2002-11-15 22:24:20		
Waiting for File Conversion	2002-11-15 22:24:18		
Waiting for Files to be Sorted	2002-11-15 22:22:57		
Manuscript File Added	2002-11-15 22:22:57		
Waiting for Author Approval of Converted Files	2002-11-15 22:22:49		
File Conversion Complete	2002-11-15 22:22:49		
Waiting for File Conversion	2002-11-15 22:21:11		
Waiting for Files to be Sorted	2002-11-15 22:21:11		
Manuscript Submitted	2002-11-15 22:21:11		
Manuscript Files Submitted	2002-11-15 22:21:11		
Preliminary Manuscript Data Submitted	2002-11-15 22:18:37		

View/Add Staff Notes (0)
View E-mail (0)

Manuscript terse notes

A manuscript terse note is used to store important information about a manuscript, i.e. 'the corresponding author is to be contacted by telephone only'. A terse note can only be entered once, however it can be modified as many times as necessary. This note will always appear on the manuscript summary screen as one of the manuscript detail fields.

To add or view a manuscript general or terse note, first you must find the manuscript.



- Click on the **Check Manuscript Status** link under Staff Links
- Enter data in the fields that you wish to use to search for the manuscript
- Click **Search**

Alternatively you can search on **Category Search**, which searches by stage.

The search results will match your search criteria and will be returned in a table. The tables will display the manuscript number, manuscript title, corresponding and contributing authors, current stage, editors and the decision.

Manuscript #	Manuscript Title	Corresponding Author	Contributing Authors	Current Stage	Editor	Associate Editor	Decision
11R	Test	Marissa Barlow (Allen Press)	Troy Smith (Allen Press)	Potential Reviewers Assigned	Grant	Linda Peterson	N/A
11	This is a test	Marissa Barlow (Allen Press)	Troy Smith (Allen Press)	Revision Received	Grant	Linda Peterson	Major revision and additional review
13	This is Another Test	Marissa Barlow (Allen Press)	N/A	Manuscript Withdrawn	Grant	Linda Peterson	Withdrawn
14	test11	Marissa Barlow (Allen Press)	Chris Warren (Allen Press)	Manuscript Withdrawn	Grant	Albert Einstein	Withdrawn

- Click on the manuscript you require and you will be taken to the manuscript summary screen
- For a terse note, the note will be displayed on the summary table as a separate field
- For a general note you will need to click on **Add/View Staff Note**

To add a general or terse note:

No Notes currently available for this manuscript.

Add General Note | Add Terse Note | Return to Manuscript

- Click **Add Note**
- Select whether you wish to add a general or terse note
- Enter note in the space provided
- Click **Add Note**

To modify a general note:

General Notes

Sent By	Date	Note	Modify
Staff Person	2002-11-16 08:14:11	This is my general test note.	Edit Note

No Terse Notes currently available for this manuscript.

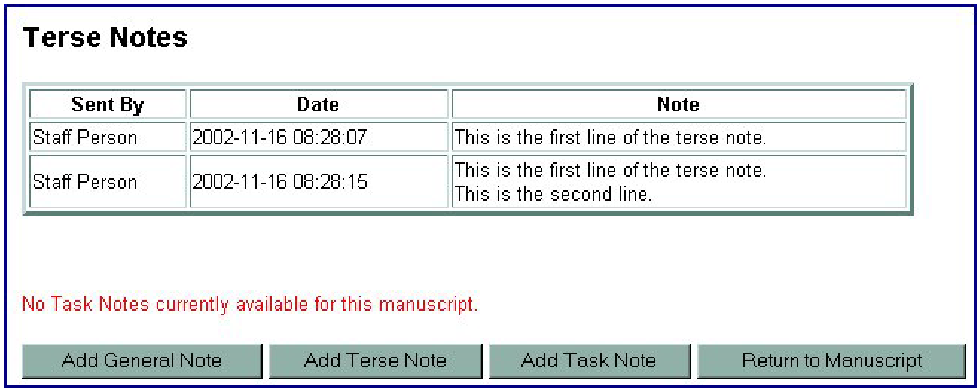
No Task Notes currently available for this manuscript.

Add General Note | Add Terse Note | Add Task Note | Return to Manuscript

- Click **Edit Note**
- Make the modifications
- Click **Add Note**

To modify a terse note:

- Click **Add Terse Note**, as if entering a new note
- The previous terse note should appear for you to edit
- Make modifications
- Click **Add Note**



Staff: how to add/view a person general or terse note

Person general notes:

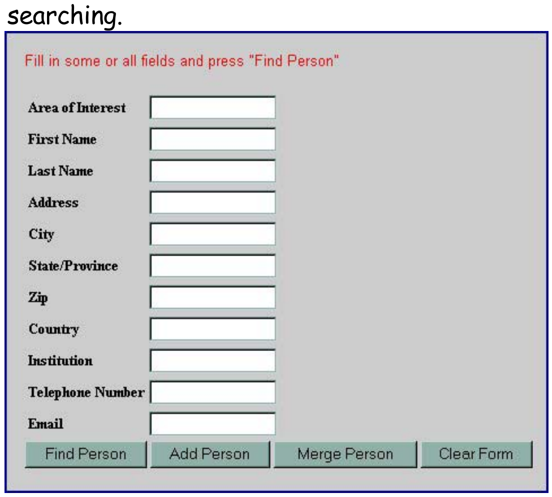
A person general note us used to store general information about a person, i.e. 'likes to be called Bill, not William'. A general note can be entered and modified as many times as necessary. The person who enters or modifies the note will be recorded, as will the date of modification. This note will appear on the person bio screen.

Person terse notes:

A person terse note is used to store notes that you would like to be displayed when assigning reviewers, i.e. 'would not be 1st choice for reviewer – takes too long'. A terse note can only be entered once; however it may be modified as many times as necessary.

To add or view a person note, first you must find the person.

- Click on **Find Person**
- Enter data in the fields that you wish to use to search for a person. You may use the wildcard (*) when searching.



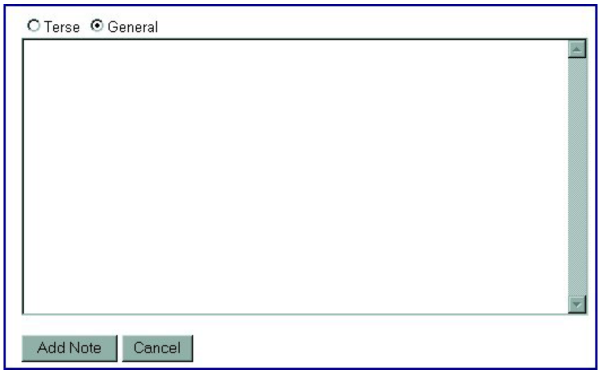
The search results will be returned to you as a list of person names matching your search criteria. Along with the person names you will also see details of institution, manuscripts authored, reviewed etc. and keywords/area of expertise.

Clicking on a person name hyperlink will take you to that person's profile, including the keyword table and notes field.

To add a general or terse note:

- Click **Add Note**

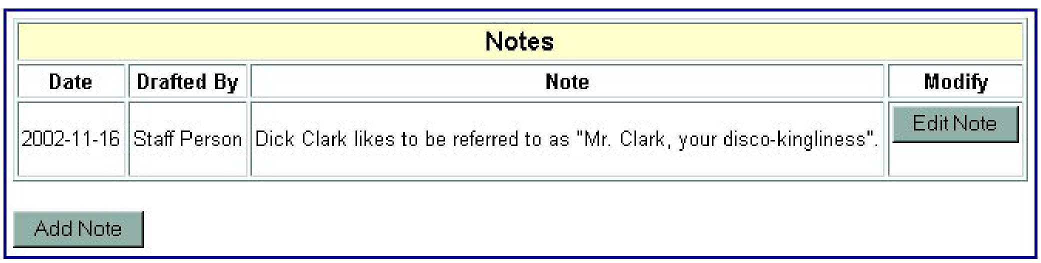
- Select whether you wish general or terse note
- Enter note in the space provided
- Click **Add Note**



Once you have added a note, a button to edit the note will also appear.

To modify a general note:

- Click **Edit Note**
- Make modifications
- Click **Add Note**



Notes			
Date	**Drafted By**	**Note**	**Modify**
2002-11-16	Staff Person	Dick Clark likes to be referred to as "Mr. Clark, your disco-kingliness".	Edit Note

Add Note

To modify a terse note:

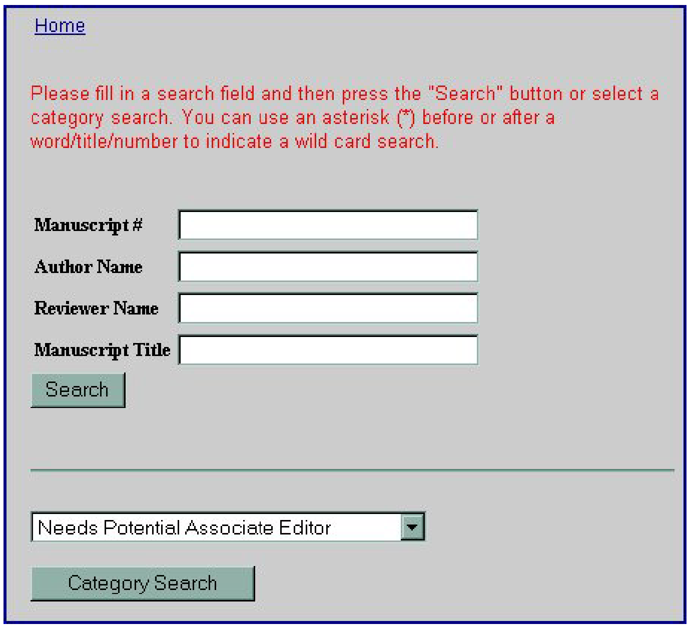
- Click **Add Note**, as if entering a new note
- Select **Terse Note**
- The terse note will automatically appear in the text box for you to edit
- Make modifications
- Click **Add Note**

Staff: how to add/view/close task notes

You may wish to use task notes when you wish an additional task to be performed on the manuscript, i.e. 'please send email to author to apologize for late decision'.

To add a task note, first you will need to find the manuscript.

- Click on **Check Manuscript Status**
- Enter data in the fields that you wish to use to search for the manuscript
- Click **Search**

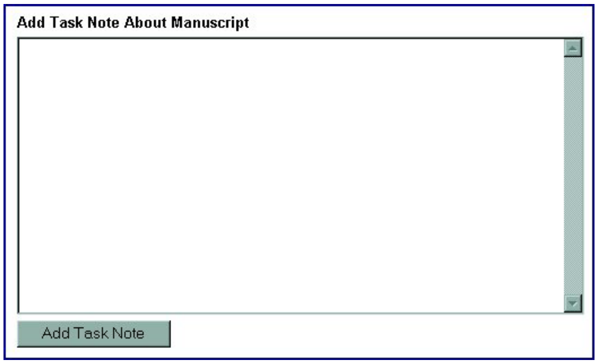


Alternatively you can search on **Category Search**, which searches by stage.

The search results will match your search criteria and will be returned in a table. The tables will display the manuscript number, manuscript title, corresponding and contributing authors, current stage, primary and secondary editors and the decision.

Click on the manuscript you require and you will be taken to the manuscript summary screen. Alternatively you can click on a manuscript number hyperlink to get to the manuscript summary screen.

- Click on **Add/View Staff Note**
- Click **Add Task Note**
- Enter the task note
- Click **Add Task Note**



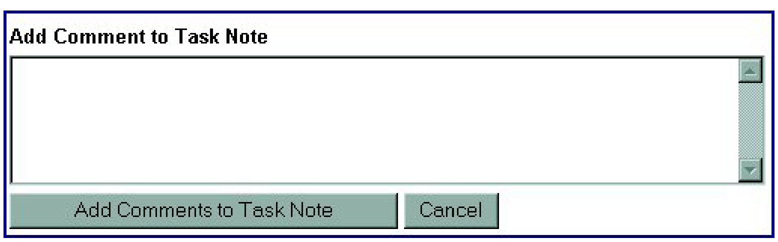
You will be able to view this note on the manuscript summary screen, where you can also view general and terse notes as well as any manuscript number hyperlink.

A small icon appears next to the manuscript number indicating that there is a task note.

- Click on the icon
- Read the task note
- Click **Close Window**

If you have performed the task and wish to close the task note:

- Click on the icon
- Under the status heading, click on **Close**



- Enter a note to explain why the note is being closed
- Click **Add Comments to Task Note**

Staff: how to upload an attachment

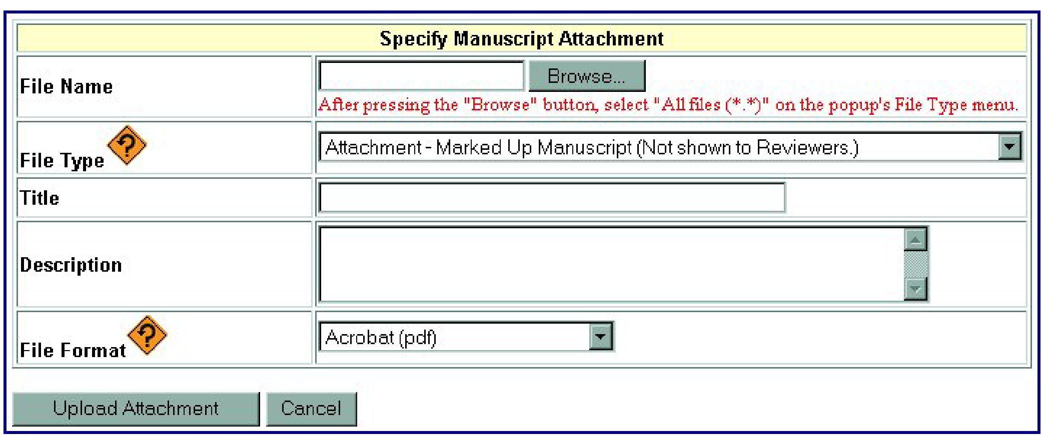
This function is used to add additional attachments to the manuscript items. This may be an appeal letter or any other additional attachments that the author or reviewer may send.

To upload an additional attachment you will need to use the Advanced Manuscript Task **Upload Attachment**.

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Upload Attachment**

If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

- Using **Browse** find the manuscript file
- Select the **File Type** from the dropdown menu
- Enter a **Title** and **Description** (optional)
- Select the **File Format**
- Click on **Upload Attachment**



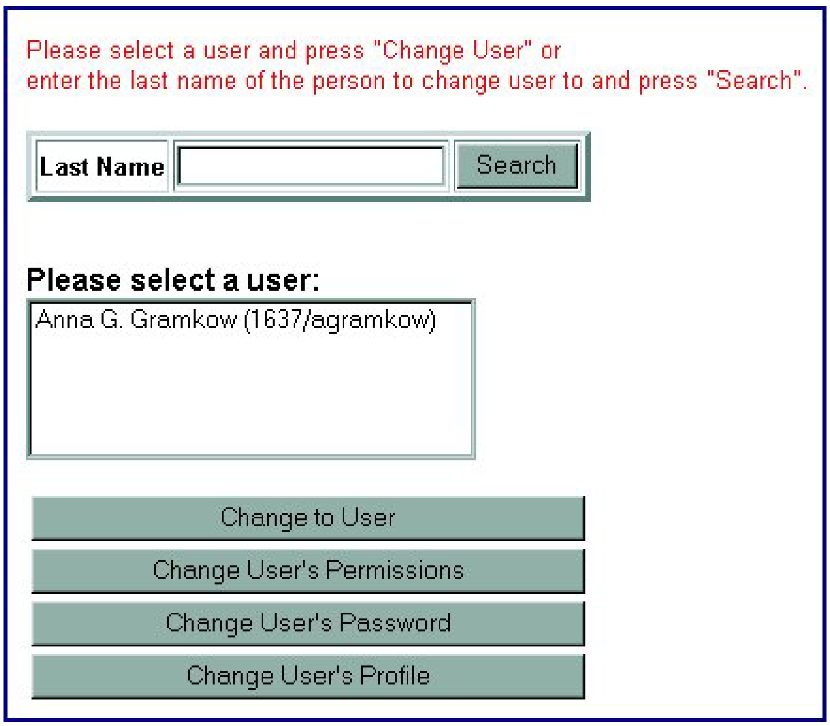
You will be able to view this attachment where the manuscript items are listed (mainly the manuscript summary screen).

Staff: how to change to another user

There may be times when you need to see what another user can see without having their password to gain access. You may need to do this to assist another user with troubleshooting, or you may need to cover for absent colleagues.

- Click on **Change User/Profile/Password/Security**
- Enter the surname of the person in the space provided
- Click on **Search**

Underneath the name field you will see a list of people matching your search criteria.



- Highlight the user who you wish to change to
- Click on **Change to User**

You will now be taken to the homepage of the user that you have selected.

Staff: how to change your own profile/password/signature

When any of your own details change, i.e. telephone extension, signature etc, you will need to update your own profile. It is also recommended that you change your password regularly.

To change your profile:

- Go to **General Tasks** on your desktop
- Click on **Modify Profile/Password**
- If necessary, make changes to your details
- If necessary, change your password. To do this you will need to enter your old password.
- Click on **Modify Profile** to save the changes

Staff: how to merge person profiles

As you work with the data you will begin to notice that many people in the database are duplicate entries. The system automatically stores duplicates with the same last name and email address or first name and last name. You will find this function in **Manage Accounts**.

If you come across two accounts that need merging while you are searching the database, i.e. using **Find Person**, then you may merge the account at this point.

- Click on **Find Person**
- Enter data in the fields that you wish to use to search for a person. You may use the wildcard (*) when searching.
- Click on the **Find Person** button

When the search results are returned to you, there will be a list of person names matching your search criteria. Along with the names you will also see institution, information on manuscripts authored, reviewed etc. and keywords/area of expertise.

Person Search Results

Name	Institution	Manuscripts Submitted	Manuscripts Published	Current Manuscripts Reviewing	Past Reviewed Manuscripts	Keywords/Area of Expertise
Joel O'Smith	PCW	0	0	0	0	
Cade Smith		0	0	0	1	
Fred Smith		0	0	0	2	
Jane Smith		0	0	1	0	
Jane Smith	University of Science	1	0	0	0	BIOLOGY, CELL, DERMATOLOGY, PROF, PROFESSOR/ASST, STAINS
Joe Smith		0	0	0	1	
Joel Smith	PCW	0	0	0	1	
Joseph Smith	Louisiana State Univesity	1	0	0	1	
Robert Smith		0	0	0	0	
Sarah Smith Smith	Allen Press	0	0	0	2	ONE, SELECT
Troy D Smith	Allen Press, Inc.	5	1	8	9	OTHER

Add Person | Merge Person

At this point you may notice that there are duplicate people stored in the database. Do not click on the person name hyperlink. Instead:

- Scroll to the bottom of the person table
- Click on **Merge Person**

This will take you to the **Manage Accounts**, **Merge Person** function. The system will automatically pick up on certain similarities.

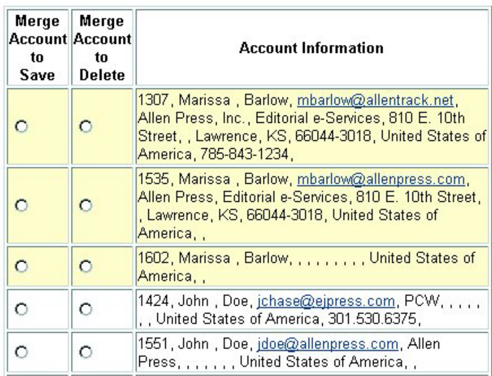
Merge Accounts

Accounts with matching first and last names (12)
Accounts with matching last names and e-mail addresses (11)
Accounts with matching last names and telephone numbers (2)
Power Merge
Specify Specific Accounts to Merge

- Click on the link that takes you to the duplicate information. This could be:
    - Accounts with matching first and last names
    - Accounts with matching last names and email addresses
    - Accounts with matching last names and telephone numbers
    - Power merge – select search categories, i.e. first name and city
    - Specify specific accounts to merge

When using the recommended first three choices, you will be given brief details of the profiles and asked to:

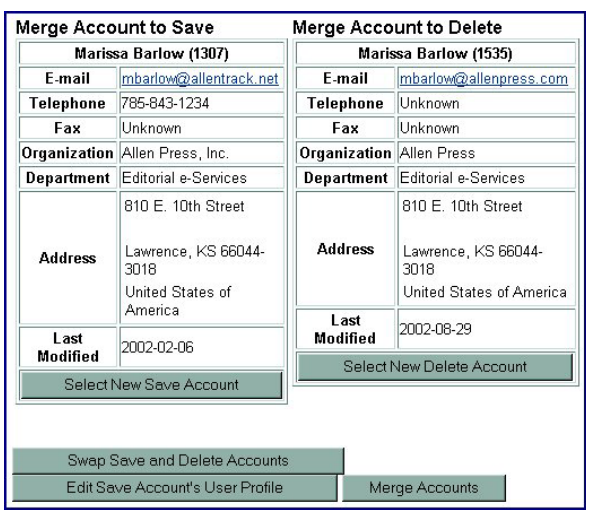
- Select **Merge Account to Save**
- Select **Merge Account to Delete**
- Click **Display Account Details** located at the bottom of the screen



Merge Account to Save	Merge Account to Delete	Account Information
○	○	1307, Marissa , Barlow, mbarlow@allentrack.net, Allen Press, Inc., Editorial e-Services, 810 E. 10th Street, , Lawrence, KS, 66044-3018, United States of America, 785-843-1234,
○	○	1535, Marissa , Barlow, mbarlow@allenpress.com, Allen Press, Editorial e-Services, 810 E. 10th Street, , Lawrence, KS, 66044-3018, United States of America, ,
○	○	1602, Marissa , Barlow, , , , , , , , , United States of America, ,
○	○	1424, John , Doe, jchase@ejpress.com, PCW, , , , , , , United States of America, 301.530.6375,
○	○	1551, John , Doe, jdoe@allenpress.com, Allen Press, , , , , , , United States of America, ,

The system will show you the two profiles that you have selected to merge.

- Check the details, and click either:
  - ***Swap, Save and Delete Accounts***
  - ***Edit/Save Account's User Profile***
  - ***Merge Accounts***



Merge Account to Save

Marissa Barlow (1307)	
E-mail	mbarlow@allentrack.net
Telephone	785-843-1234
Fax	Unknown
Organization	Allen Press, Inc.
Department	Editorial e-Services
Address	810 E. 10th Street Lawrence, KS 66044-3018 United States of America
Last Modified	2002-02-06

Select New Save Account

Merge Account to Delete

Marissa Barlow (1535)	
E-mail	mbarlow@allenpress.com
Telephone	Unknown
Fax	Unknown
Organization	Allen Press
Department	Editorial e-Services
Address	810 E. 10th Street Lawrence, KS 66044-3018 United States of America
Last Modified	2002-08-29

Select New Delete Account

Swap Save and Delete Accounts

Edit Save Account's User Profile

Merge Accounts

Staff: how to change manuscript type

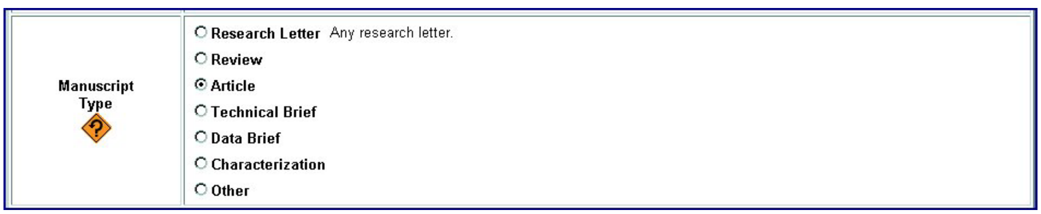
If the author has classified the manuscript with the incorrect manuscript type, (i.e. as an Article when it should be a Brief Communication) you can change the manuscript type by using the Advanced Manuscript Task **Modify Manuscript Data**.

To change the manuscript type:

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Modify Manuscript Data**

If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

- Scroll down to the manuscript type field
- Change the manuscript type to the correct one



- Scroll down to the bottom of the submission form
- Click **Update Manuscript**

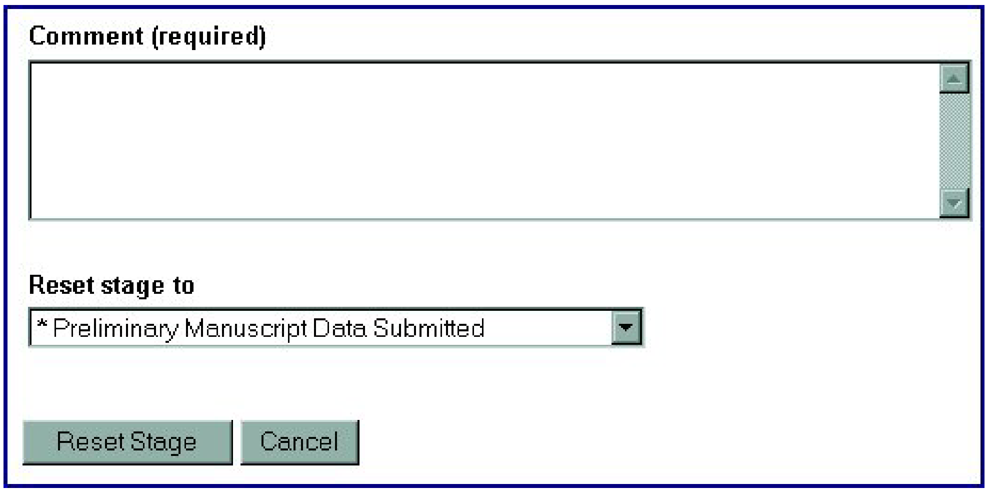
System Administrator: resetting stage

If a manuscript has been moved on to a particular stage in error, the System Administrator can re-set the stage to rectify this.

To re-set the manuscript stage:

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Reset Stage**

If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.



- Enter a **Comment** to indicate why the manuscript stage is being reset. This comment will appear as a manuscript general note (for more information please see page 42).
- Select the **Stage** you wish to reset to
- Click **Reset Stage**

The system records details of the user performing this action and the date when the action was performed.

When a stage is reset, any previous comments, reviews, recommendations and modified template letters will automatically be stored. However it is advisable to make copies of modified template letters before the stage is reset.

<u>System Administrator: adding new Staff/Editors to the database</u>

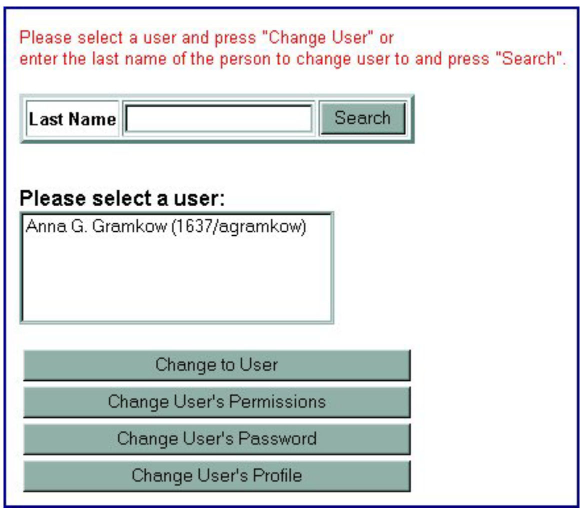
When a new person joins the editorial team the System Administrator will need to add their details to the database (see page 10 for instructions how to do this). The System Administrator will also need to set the relevant user permission for the new person.

To set permission for new Staff/Editors:

- After the person has been added to the database click on **Change User/Profile/Password/Security**
- Enter the surname of the person in the space provided
- Click on **Search**

Underneath the name field you will find a list of people matching your search criteria.

- Highlight the person you wish to set permission for



- Click on **Change Users Permissions**
- Check the permission you wish to give the person:

If the new person is assigned Staff-level permission, you need to check the relevant boxes next to each stage. This determines which folders the new person will be shown and the level of access he/she will have to each folder. You may also need to assign the Staff person to an Editor.

- Click **Change Security**

<u>System Administrator: adding/editing letters in the system</u>

The System Administrator can add new decision letters to the system and can also modify decision letters already on the system.

- Click on **Configuration Tasks** under the System Administrator tasks on your homepage
- Click on **Add/Edit Letters**

Two tables will appear: the top table is a list of the decision letters; the bottom table is a list of the non-decision (workflow) letters.

CONFIGURE LETTERS

Select 'Edit' to modify an existing journal-specific letter.
Select 'Create' to generate a new journal-specific letter.
Select 'Disable' to inactivate a journal-specific letter.

Add New Decision Letter

Decision Letters	Action	Disable	Test
Accept - Major Revision Needed	Edit	Disable	Test
Accept - Minor Revision Needed	Edit	Disable	Test
Accept - No Revisions needed	Edit	Disable	Test
Reject - Discourage Resubmission	Edit	Disable	Test
Reject - Encourage Resubmission	Edit	Disable	Test
Reject without Review	Edit	Disable	Test

Letter Title	Action	Disable	Test
New Registration (ltr_notif_new_registration)	Edit	Disable	Test
AE Assigned (ltr_notif_me_assigned)	Edit	Disable	Test
ltr_notif_me_needed	Edit	Disable	Test
AE Acceptance Thank You (ltr_notif_me_thankyou)	Edit	Disable	Test
New Ms Received (ltr_notif_new_ms_received)	Edit	Disable	Test
Contacting Potential AE (ltr_notif_request_me)	Edit	Disable	Test
Decision Due (ltr_notif_request_recommendation)	Edit	Disable	Test
Contacting Potential Reviewer (ltr_notif_request_reviewer)	Edit	Disable	Test
Request Review of Revision (ltr_notif_request_reviewer_of_revision)	Edit	Disable	Test

To add a new decision letter:

- Click **Add New Decision Letter**
- Fill in the text
- Click **Save**

To edit a decision or non-decision letter:

- Click **Edit**
- Make the necessary modifications
- Click **Save**

The **Disable** link will turn this letter off.

The **Test** link will allow you to view the letter as should be displayed in the system, including any added variables.

The first word in the first line of a letter is either "send" or "queued." This work determines whether the letter will be sent out immediately (sent) or if it will be placed in the Queued E-mail folder (queued) for a Staff person to view and send out later.

You can add variables into the letters, so that the relevant information will automatically be entered into the letters. The variables will always be in one format, {$???}, i.e. {$ms_title}.

For a list of variables when editing or adding letters:

- Click on **Help for Letter Variables** at the top of the screen

Help for Letter Variables

Text for "test_decision_accept_major_revision.txt"

```
queued|Accept - Major Revision Needed|Decision Letter|3
Subject={$ms_no} Decision Letter

Dear {$addressee_salutation},

Your manuscript "{$ms_title}" has been reviewed and accepted for publication in
{$journal_name}.   It has been determined, however, that a major revision is
necessary.   Please consult the reviewer's comments (below) for more
information. We ask that you return your revised manuscript by
{$review_due_date}. When you are ready to upload your revisions, please log in
and follow the links for this manuscript.

{$editor_comment}

Sincerely,

{$eic_signature_block}
```

The **Help for Letter Variables** will show you a table of variables for your system

The variables implemented in your system are:

{$addressee_salutation}	This variable is replaced by the title and last name of the person to whom the letter is being sent.
{$corr_auth}, {$corresp_author}, {$corr_auth_salutation}	The name of the corresponding author.
{$corr_auth_addr}	The address of the corresponding author.
{$corr_auth}	The name of the corresponding author.
{$managing_editor_signature_block}	This variable is replaced by the Managing Editor's signature block.

It is highly recommended that you **always** test a letter when adding, creating, or editing it.

In the image of the letter above is a circled number at the end of the first line. This number corresponds to the type of decision to which this letter is associated. Every decision letter <u>must</u> have a number.

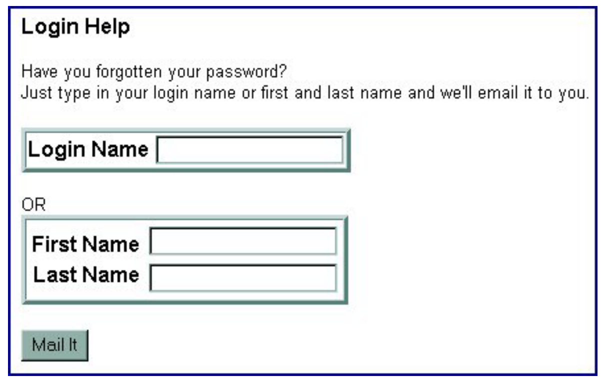
1 = Accept
2 = Revise only
3 = Revise and re-review
4 = Reject

The Editor's list of decision choices corresponds to these numbers. When the Editor selects a decision and a letter, the system checks to make sure the numbers match. Contact AllenTrack Support if the letter has the correct number, but the decision the Editor would like to select does not match (an error message asks the Editor to go back and make them match).

Author: unknown or forgotten password

If a user wishes to obtain a new password, or forgets their login name, the **Unknown/Forgotten Password** link on the AllenTrack login page should be used to email a new password to the user.

As Staff you can help the user obtain a new password in two ways: by informing them of the **Unknown/Forgotten Password** link and giving them instructions how to use the link themselves, or by using the **Unknown/Forgotten Password** yourself to email the new password to them. To perform this task on the user's behalf you will need to know either the user's login name or first name and last name.



- Go to the AllenTrack login page
- Click on **Unknown/Forgotten Password**
- Enter either the user's login name or the user's first name and last name
- Click on **Mail It**

If there are multiple people matching your first name and last name criteria, the system will prompt you to enter your own login name to clarify or contact the editorial office.

If the names are correct and unique the system will email the user their login name and a new password.

To access their new login and password the user should:

- Go to their email inbox
- Open the email from AllenTrack and use the login name and the new password when logging back in

Once they have logged in to the system they will be prompted to change their password.

- Enter the **New Password** and repeat this **New Password** in the fields required
- Click on **Change Password** to store the new password

If the user has tried using the **Unknown/Forgotten Password** link and still cannot obtain a password, the recommended way to deal with this is to forward their login name to them. The login names are unique which means there will only ever be one of these login names in the system.

- Click on **Find Person**
- Enter data in the fields that you wish to use to search for a person. You may use the wildcard (*) when searching.
- Click on the button **Find Person**

When the search results are returned to you, there will be a list of person names matching your search criteria. Along with the names you will also see institution, details of manuscripts authored and reviewed and keywords/area of expertise.

- Click on the person name hyperlink
- Scroll to the bottom of the person bio screen
- Click on **Modify Profile**

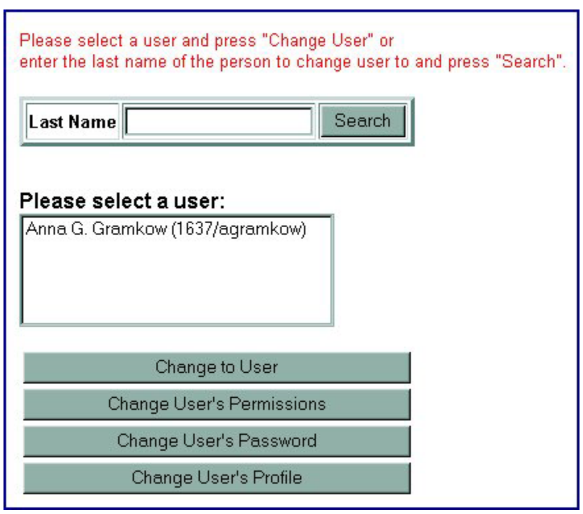
The person's login name is the first field on the registration form. You can either inform the person of their login name over the phone or email it to them.

There may also be occasions when you need to manually change the user's password. To do this you will need to use **Manage Accounts**.

- Click on **Manage Accounts**
- Click on **Change User/Profile/Password/Security**
- Enter the surname
- Click on **Search**

Underneath the name field you will find a list of names matching your search criteria.

- Highlight the person whose details you wish to change
- Click on **Change User's Password**



If the user is not editorial Staff you will not need to know the old password to change to a new one.

- Enter a new password
- Click on **Update Password**

You will need to email the user the new password and ask them to change this password through their **Modify Profile/Password** listed under the general tasks on their homepage.

Author: change of contact details

To change the details of any person they **must** be registered on the system already.

Using **Manage Accounts** you will be able to check if a person is registered on the system, access their records and change their details. You will be able to perform the following tasks:

- Change a person's contact details
- Mark a person inactive
- Add a temporary address
- Add keywords

In order to change a person's profile (that is, someone who is not a Staff person) you do not need to know the person's password. Please leave these spaces blank.

- Click on the folder **Manage Accounts**
- Click on **Change User/Profile/Password/Security**
- Enter the surname of the person in the space provided
- Click on **Search**

Underneath the name field you will find a list of people matching your search criteria.

- Highlight the person whose details you wish to change
- Click on **Change User's Profile**

You will now be taken back to the completed registration form for that person. Here you can change any of the person's details, mark them active or inactive and add person keywords.

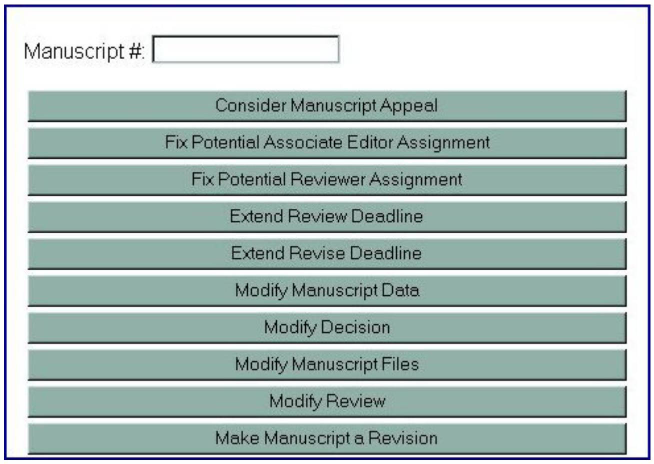
- Once you have changed any details click on **Save Changes**

You can also change a person's profile when you are using the function **Find Person**, by clicking on the person's name hyperlink. The first screen you will see is the person bio screen. This will give you the person's address, notes, keywords and manuscript history. At the bottom of this page under the keyword table, there is a **Modify Profile** button. By clicking on this you will enter the person's registration form. You should then follow the instructions above to make any changes to the person's details.

Author: change of manuscript details

If the author wishes to change any of the details that they input on the manuscript submission form, you may do this for them. To perform this task you will need to use the Advanced Manuscript Task **Modify Manuscript Data.**

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Modify Manuscript Data**



If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

You will be taken back to the first step of submission, the submission form. Here you will be able to make any changes to the receive date, corresponding and contributing authors, the manuscript type, title and abstract, etc.

- Once you have made the necessary changes, click on **Update Manuscript**

The system will tell you that the manuscript metadata has been updated.

- Click on **Manuscript Home** to continue

Author: change of manuscript files

If an author submitted the wrong version of manuscript file or wishes to add or delete a file, you may do this by using the Advanced Manuscript Task **Modify Manuscript Files.**

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Modify Manuscript Files**

If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

You will be taken to the current list of manuscript items.

- Click on the link that you require:
    - **Replace** – to replace the attachment if the previous one is wrong or of bad quality
    - **Delete** – to completely delete the manuscript file
    - **Change File Type/Title** – to change the title of attachment or the type of manuscript item, i.e. article to pre-print

Or you can choose from a list of task links:

- **Add File**
    - Select attachment through **Browse**
    - Select **File Type**
    - Select **File Format** (for figures please include the figure number in the title)
    - Click **Add file**
    - Select **Sequence Number** and if wished tick file to **Include in Merge**
    - Click **Continue**

The list of manuscript items will now contain the new files. You will need to wait for the system to convert the files and create the merged PDF.

- Click on **Check for Completion of File Conversion**

When all the files have converted:

- Click on **Approve Converted Files**

Author: withdrawing a manuscript

If the author wishes to withdraw a manuscript, you can do this by using the Advanced Manuscript Task **Withdraw Manuscript**.

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided. You may use a wildcard (*) when searching in this field.
- Click on **Withdraw Manuscript**

If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

You will be taken to a page of manuscript details. Check the details to make sure that you have the correct manuscript.

- From the dropdown menu, select the reason you wish to withdraw the manuscript
- Click on **Withdraw Manuscript**

Manuscript #	2001TEST000011
Current Revision #	0
Submission Date	2001-05-16 00:00:00
Current Stage	Waiting for Copy Editing
Title	Sketches New and Old
Running Title	Sketches
Manuscript Type	Research Letter
Corresponding Author	Staff Person (Allen Press, Inc.)
Contributing Author	Mark Twain
Abstract	Sketches New and Old
Associate Editor	(Redacted)
Editor	Person
Reviewers	(Redacted)
Keywords	sketch
Decision	/ 2001-09-21
Issue	2002-04-01

Withdraw Manuscript | Cancel

You will still be able to search for this manuscript through **Check Manuscript Status**. When you get your search results, the current stage will be marked as 'manuscript withdrawn'.

Reviewer: accepting/declining an invite

When a reviewer emails or phones you to accept or decline a review invite, you will need to enter this manually on the system.

- Click on the folder **Contact Potential Reviewer**
- Select the manuscript which the reviewer is associated with
- Scroll to the table of reviewers and their contact dates
- Click on either **Accept** or **Decline**

Potential Reviewer	Process/Status	Accept/Decline Date	E-mail	Phone Number	First Contact Date	Second Contact Date	Third Contact Date
Cade Smith	Send E-mail Modify E-mail Accept Decline No Resp.		csmith@pss.msstate.edu	Unknown	2002-04-03 15:47:52	2002-05-05 12:14:36	
Julie Larson (Center for Peer Review)	Send E-mail Modify E-mail Accept Decline No Resp.		mbarlow@allentrack.net	Unknown	2002-04-03 15:47:54	2002-05-05 12:15:14	

- Read/modify the letter
- Click **Send**

The system will automatically update with the accept/decline date.

- Click **Manuscript Home** to continue

Reviewer: request for hard copy of manuscript

If a reviewer has requested a hard copy of a manuscript because they are unable to access the manuscript items through the system, you may email them the attachments through **Send Manuscript Correspondence**.

If the reviewer has requested hard copy and there is no alternative to sending a hard copy, you will need to print out the manuscript.

To do this, first you will need to search for the manuscript.

- Click on **Check Manuscript Status**
- Enter the manuscript number
- Click **Search**

Your results will be returned in a table.

Manuscript #	Manuscript Title	Corresponding Author	Contributing Authors	Current Stage	Editor	Associate Editor	Decision
11R	Test	Marissa Barlow (Allen Press)	Troy Smith (Allen Press)	Potential Reviewers Assigned	Grant	Linda Peterson	N/A
11	This is a test	Marissa Barlow (Allen Press)	Troy Smith (Allen Press)	Revision Received	Grant	Linda Peterson	Major revision and additional review
13	This is Another Test	Marissa Barlow (Allen Press)	N/A	Manuscript Withdrawn	Grant	Linda Peterson	Withdrawn
14	test11	Marissa Barlow (Allen Press)	Chris Warren (Allen Press)	Manuscript Withdrawn	Grant	Albert Einstein	Withdrawn

- Click on the manuscript you require by clicking on the manuscript number hyperlink

You will now see the manuscript items.

Manuscript Items

1. Article File #1 PDF (4Kb)
   Source File (23Kb)

- Click on the **PDF** link of the manuscript item you wish to print
- The item will open into a different window - use the **File** menu bar to print

Reviewer: unable to view/access any manuscript files

If a reviewer is unable to access the AllenTrack site to see the files but still requests an electronic version, or if they are experiencing a problem viewing one of the manuscript files, then you can send the item(s) to them in an email using **Send Manuscript Correspondence**. Sending an email using this function allows the email correspondence to be stored in connection with the manuscript.

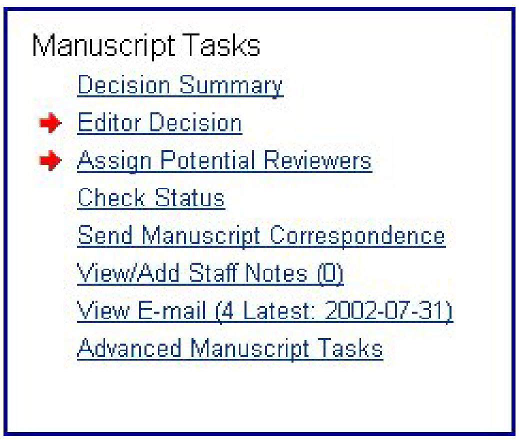
- Click on **Check Manuscript Status**
- Enter the manuscript number
- Click **Search**

Your search results will be returned in a table.

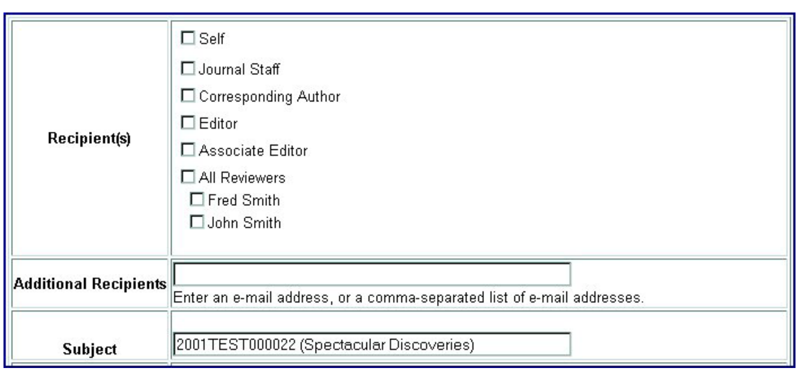
- Click on the manuscript you require

Underneath the manuscript items you will see a list of task links.

- Click on **Send Manuscript Correspondence**
- Mark the **Recipient(s)** that you wish to receive the mail



- Include any **Additional Recipients**
- If needed edit the **Subject**

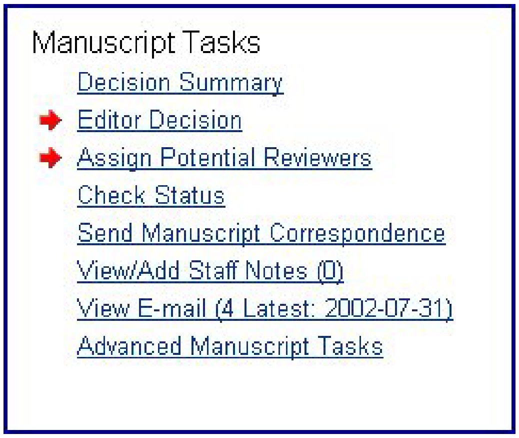


- Write the **Message**
- **Select** the attachments you wish to send

- Click on **Send Email**

The recipient will receive the email in their email inbox. The email will also be stored in the email log on AllenTrack.

To view this email after it has been sent, return to the list of task links.



- Click on **View Email**
- You will see a table of all of the emails that have been sent through the system for this manuscript
- Click on the email you wish to view

Date	Draft	Triggered By	Resend	To	Message
2002-01-20 23:07:29	No	Staff Person	Resend Email	Marissa Barlow mbarlow@allenpress.com, plotkin@ejournalpress.com	Copy Editing of 2001TEST000007R has been assigned to you
2002-01-20 23:03:40	No	Staff Person	Resend Email	Marissa Barlow mbarlow@allenpress.com, plotkin@ejournalpress.com	2001TEST000007R Manuscript Awaits!
2001-12-26 00:32:18	No	Staff Person	Resend Email	Unknown (0) mbarlow@allenpress.com, plotkin@ejournalpress.com	2001TEST000007R Decision Letter

Reviewer: request for additional attachments

There may be some circumstances where you need to email an additional attachment to a reviewer. You should send these emails through AllenTrack so that a log of the email is kept against the manuscript, rather than sending it through your personal email.

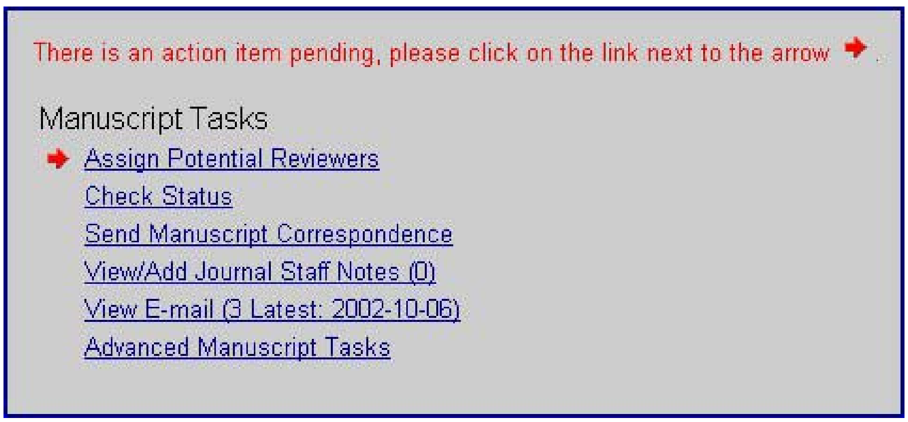
To send the email and attachment you must first search for the manuscript.

- Click on **Check Manuscript Status**
- Enter the manuscript number
- Click **Search**

Your search results will be returned in a table.

- Click on the manuscript you require

Underneath the manuscript items you will see a list of task links.



- Click on **Send Manuscript Correspondence**
- Mark the **Recipient(s)** that you wish to receive the mail
- Include any **Additional Recipients**
- If needed edit the **Subject**
- Write the **Message**
- **Select** or **Browse** the attachments you wish to send
- Click on **Send Email**

The recipient will receive the email in their email inbox. The email will also be stored in the email log on AllenTrack.
To view this email after it has been sent, return to the list of task links.

- Click on **View Email**

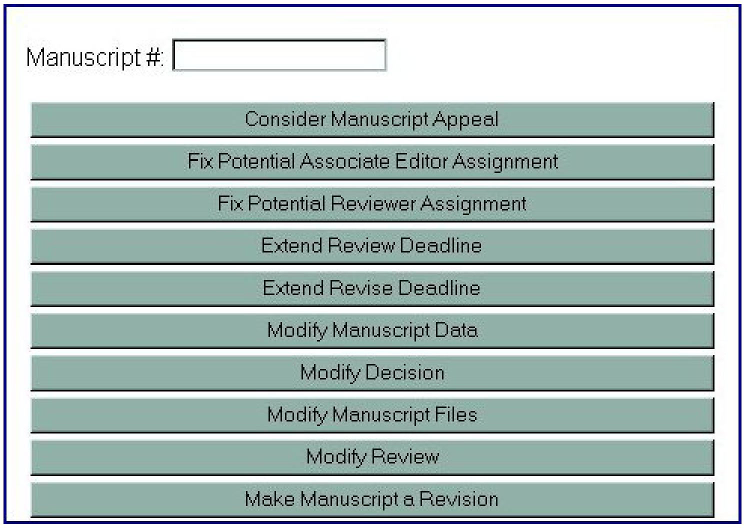
You will see a table of all of the emails that have been sent through the system for this manuscript.

- Click on the email you wish to view

Reviewer: change of review duration

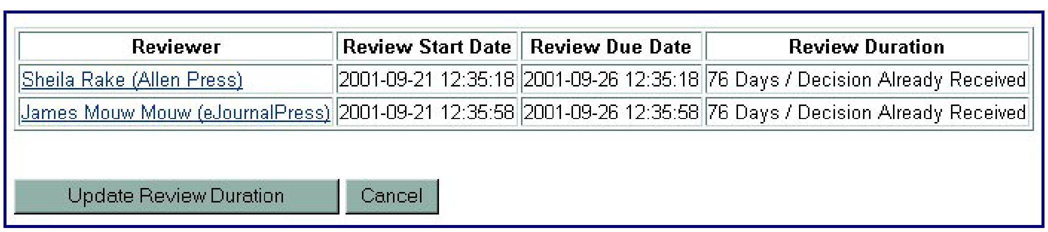
If a reviewer has been assigned to a manuscript and accepts the invite but later contacts you to tell you that the review will be late, you can use the Advanced Manuscript Task **Extend Review Deadline** to alter the default review duration.

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided
- Click on **Extend Review Deadline**


Manuscript #:

Consider Manuscript Appeal
Fix Potential Associate Editor Assignment
Fix Potential Reviewer Assignment
Extend Review Deadline
Extend Revise Deadline
Modify Manuscript Data
Modify Decision
Modify Manuscript Files
Modify Review
Make Manuscript a Revision

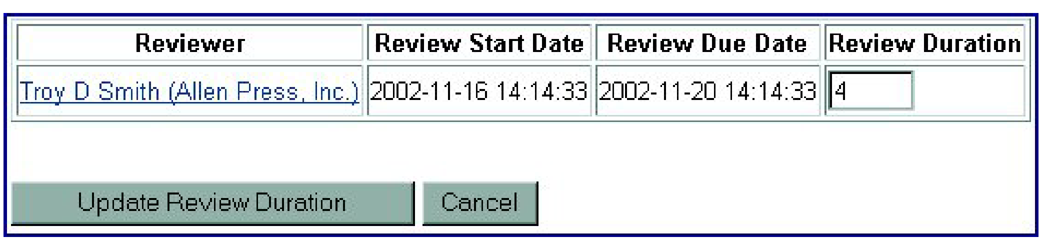
- Find the correct Reviewer and change the number of days to review for that reviewer
- Click on **Update Review Duration**



Reviewer	Review Start Date	Review Due Date	Review Duration
Sheila Rake (Allen Press)	2001-09-21 12:35:18	2001-09-26 12:35:18	76 Days / Decision Already Received
James Mouw Mouw (eJournalPress)	2001-09-21 12:35:58	2001-09-26 12:35:58	76 Days / Decision Already Received

Update Review Duration Cancel

Modify the **Review Duration** period and click **Update Review Duration**



Reviewer	Review Start Date	Review Due Date	Review Duration
Troy D Smith (Allen Press, Inc.)	2002-11-16 14:14:33	2002-11-20 14:14:33	4

Update Review Duration Cancel

The chase email for this reviewer will not be triggered until the new review duration is up.

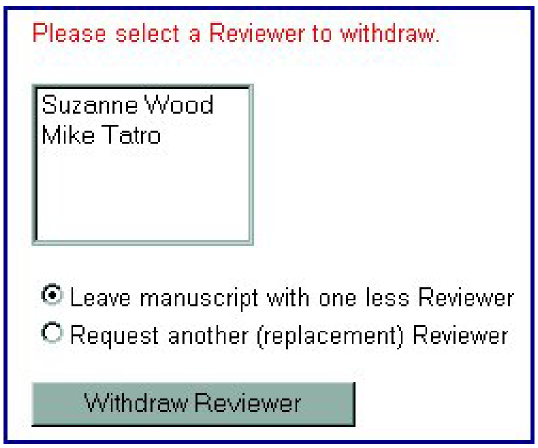
Reviewer: unable to review after accepting invite

If a reviewer changes their mind about reviewing a manuscript after they have accepted the invite then you will need to use the Advanced Manuscript Task **Withdraw Reviewer**.

- Click on **Advanced Manuscript Tasks**
- Enter the manuscript number in the space provided (**NB:** you may use a wildcard (*) when searching in this field)
- Click on **Withdraw Reviewer**

If multiple revisions/manuscript numbers appear, click on the manuscript hyperlink required.

- Select the reviewer you wish to abandon



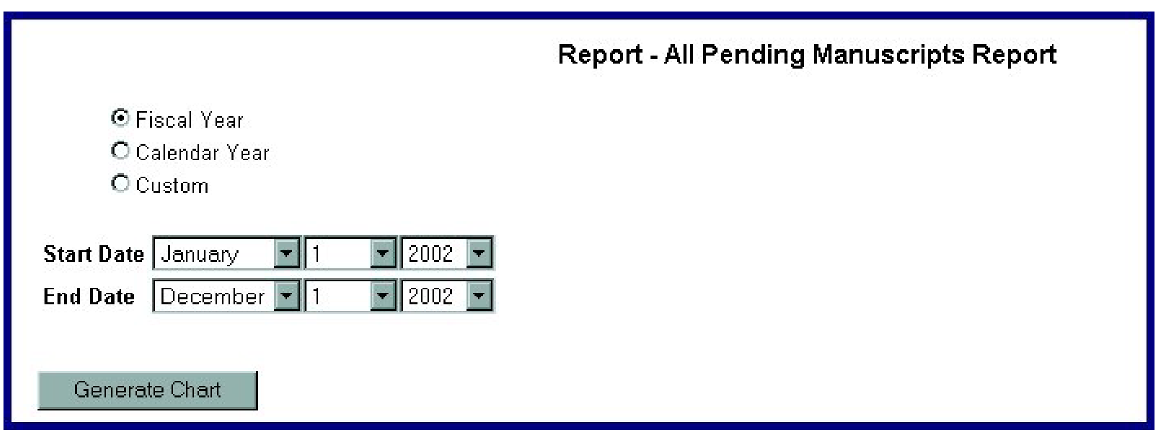
- Select whether you wish to:
    - Leave manuscript with one less reviewer – this will the leave manuscript at the current stage
    - Request another (replacement) reviewer – this will take the manuscript back to the **Assign Potential Reviewer** stage
- Click on **Withdraw Reviewer**

Reports

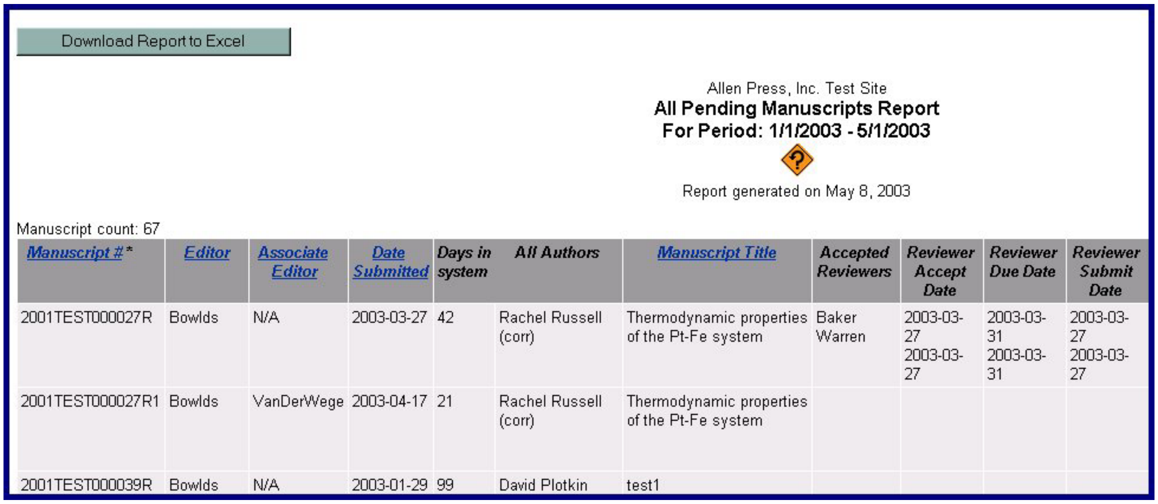
Common Reports

Listed under Staff Tasks is the link to the Reports. Clicking the link lists all the available reports. Your journal may not require or use all the available reports.

Clicking the link to a report brings up the screen allowing you to configure the report. Different reports allow for a variety of configurations. The all pending manuscripts report allows you the option to access data by calendar year, fiscal year or a customizable length of time.



Clicking the Generate Chart button allows you to view the data. You can also download the report to Microsoft Excel.



Download Report to Excel

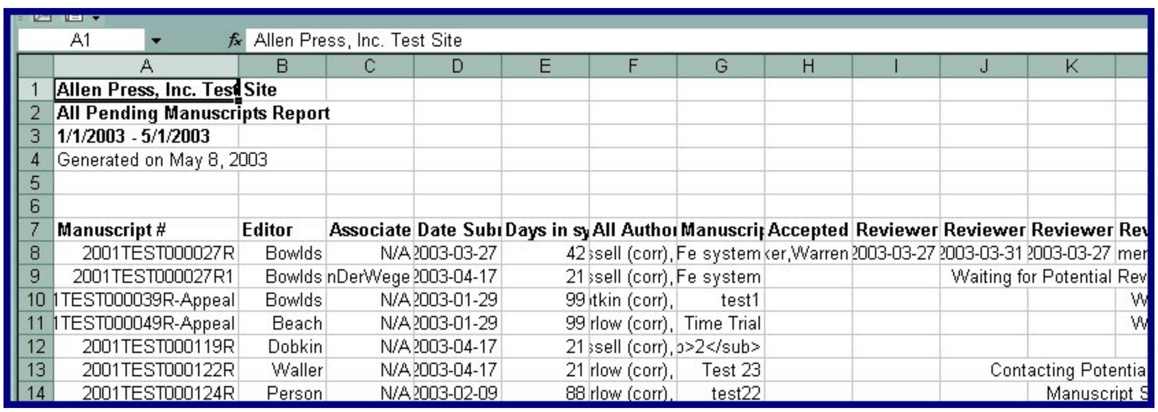
Allen Press, Inc. Test Site
All Pending Manuscripts Report
For Period: 1/1/2003 - 5/1/2003

Report generated on May 8, 2003

Manuscript count: 67

Manuscript # *	Editor	Associate Editor	Date Submitted	Days in system	All Authors	Manuscript Title	Accepted Reviewers	Reviewer Accept Date	Reviewer Due Date	Reviewer Submit Date
2001TEST000027R	Bowlds	N/A	2003-03-27	42	Rachel Russell (corr)	Thermodynamic properties of the Pt-Fe system	Baker Warren	2003-03-27 2003-03-27	2003-03-31 2003-03-31	2003-03-27 2003-03-27
2001TEST000027R1	Bowlds	VanDerWege	2003-04-17	21	Rachel Russell (corr)	Thermodynamic properties of the Pt-Fe system				
2001TEST000039R	Bowlds	N/A	2003-01-29	99	David Plotkin	test1				

If you download a report to Excel you can save it to your hard drive.



A1 Allen Press, Inc. Test Site

	A	B	C	D	E	F	G	H	I	J	K
1	**Allen Press, Inc. Test Site**										
2	**All Pending Manuscripts Report**										
3	**1/1/2003 - 5/1/2003**										
4	Generated on May 8, 2003										
5											
6											
7	**Manuscript #**	**Editor**	**Associate**	**Date Subı**	**Days in sy**	**All Authoı**	**Manuscriı**	**Accepted**	**Reviewer**	**Reviewer**	**Reviewer**
8	2001TEST000027R	Bowlds	N/A	2003-03-27	42	ssell (corr),	Fe system	ker,Warren	2003-03-27	2003-03-31	2003-03-27
9	2001TEST000027R1	Bowlds	nDerWege	2003-04-17	21	ssell (corr),	Fe system			Waiting for Potential Rev	
10	1TEST000039R-Appeal	Bowlds	N/A	2003-01-29	99	tkin (corr),	test1				
11	1TEST000049R-Appeal	Beach	N/A	2003-01-29	99	rlow (corr),	Time Trial				
12	2001TEST000119R	Dobkin	N/A	2003-04-17	21	ssell (corr),	o>2</sub>				
13	2001TEST000122R	Waller	N/A	2003-04-17	21	rlow (corr),	Test 23			Contacting Potentia	
14	2001TEST000124R	Person	N/A	2003-02-09	88	rlow (corr),	test22			Manuscript S	

If your journal requires a report that is not currently available we can get you a quote for what it would cost to create that report.

AllenTrack Common Queries

Author/reviewer queries

If you receive an AllenTrack query from an author or reviewer, which you are unable to resolve, please ask them for the following information:

- What browser are they using (usually either Netscape or Internet Explorer)?
- What version of the browser is it?
- What version of Adobe are they using to view the PDF files created?
- Are they working on a Mac or a PC?
- Exactly what steps are they taking and what appears on the screen when they do so

AllenTrack requires the following:

- Netscape 4.7 or above,
- Internet Explorer 5.0 and above
- Adobe 4.0 and above

Please ask users who are experiencing difficulty to update their programs to the minimum listed above before contacting AllenTrack Support for additional help.

The AllenTrack system also requires 'cookies' to be enabled on users' browsers (see below for more details on cookie-related problems).

Common problems

1. Files not converting

- Is the file type supported by our AllenTrack? Supported file types are:

Filetype	Acceptable for submitting	Becomes
MS Word	Article/Figure/Table	PDF
Word Perfect	Article/Figure/Table	PDF
Excel	Article/Figure/Table	PDF
Power Point	Article/Figure/Table	PDF
Adobe Photoshop	Article/Figure/Table	PDF
Adobe Illustrator	Article/Figure/Table	PDF
TIFF	Article/Figure/Table	JPEG/PDF
JPG	Article/Figure/Table	JPEG/PDF
GIF	Article/Figure/Table	JPEG/PDF
PS	Article/Figure/Table	JPEG/PDF
EPS	Article/Figure/Table	JPEG/PDF
LaTex	Article only	PDF
RTF	Article/Figure/Table	PDF
TXT	Article/Figure/Table	PDF
PDF	Article/Figure/Table	PDF
Corel Draw	Article/Figure/Table	PDF
Tab Separated	Table	PDF

If the file is not one of the formats above, it will not convert. You will need to ask the author to supply the file in a supported format.

- Was the file created on a Mac and doesn't have a file suffix (i.e. is it called 'file' other than 'file.doc'?). If this is the case please save the source file from the system, resave it with the correct file suffix and re-upload.

- Corrupted files: was the source file corrupted – can you open and view the source file without receiving error messages? Please report the conversion error to support@allentrack.net.

- Conversion taking a long time (more than 15 minutes): are the files to be converted very large (more than 5 MB)? If so give it a little more time. If the file has not converted after 45 mins report the problem to support@allentrack.net.

- Were all fonts embedded in the file before upload? Ask the Author to resave original file, checking to be sure fonts are embedded in the process, and **Replace** the source files.

- Excel files: Each Excel file must be a stand-along sheet. Items on the sheet cannot refer to another file for information. Multiple sheets should be submitted as multiple files. PDFs are created just like printing a page. Use the **Print Preview** option to see what would normally print. You can set the **Print Area** or change the **Page Setup**; Save the file and those settings will be used when the AllenTrack system creates the PDF.

Work-around for conversion problems: if you can view the source file which is not converting (or you have a hard copy), print it out and scan to create a PDF file. Delete the non-converted file and re-upload the PDF file.

2. Authors/reviewers unable to download the PDF files correctly

- Can you see the file OK?

If **yes** then it is likely to be a problem with their browser or Adobe set up. AllenTrack requirements are

- Netscape 4.7 or above,
- Internet Explorer 5.0 and above
- Adobe 4.0 and above

Ask the user to upgrade their browser/version of Adobe. Alternatively, ask them to click on the link that will take them to the source files or email them the source files (if they have a problem with Adobe) or the PDF file.

If **no** then it is probably a conversion problem. Try and reconvert the files or report the error to support@allentrack.net.

- Are the files very large (more than 3 MB) and are the users on a slow (modem) Internet connection? If yes, there could be a problem with the speed of upload/download. There is not much you can do about this – however you can try emailing the files to them if not too large for the email system.

3. Cookie problems 

Cookies are small files that are sent to your PC by web sites. Most computer operating systems are defaulted so that cookies are stored. However, for Windows XP the default is that cookies are blocked.

Problems encountered if cookies are not enabled:

- Users unexpectedly logged out of the system
- Passwords not accepted logging into the system.

To enable cookies in your browser Click on Tools and select Internet Options. Click on the **Security** tab and select **Custom Level**. Scroll down to **Cookies** and select the **Enable** button.

AllenTrack Support

support@allentrack.net
800-627-0326 ext 257, 133, or 274
785-691-5926 (emergency/night/weekend/holiday)