

ScholarOne Manuscripts™

Conversation Tool for Editors

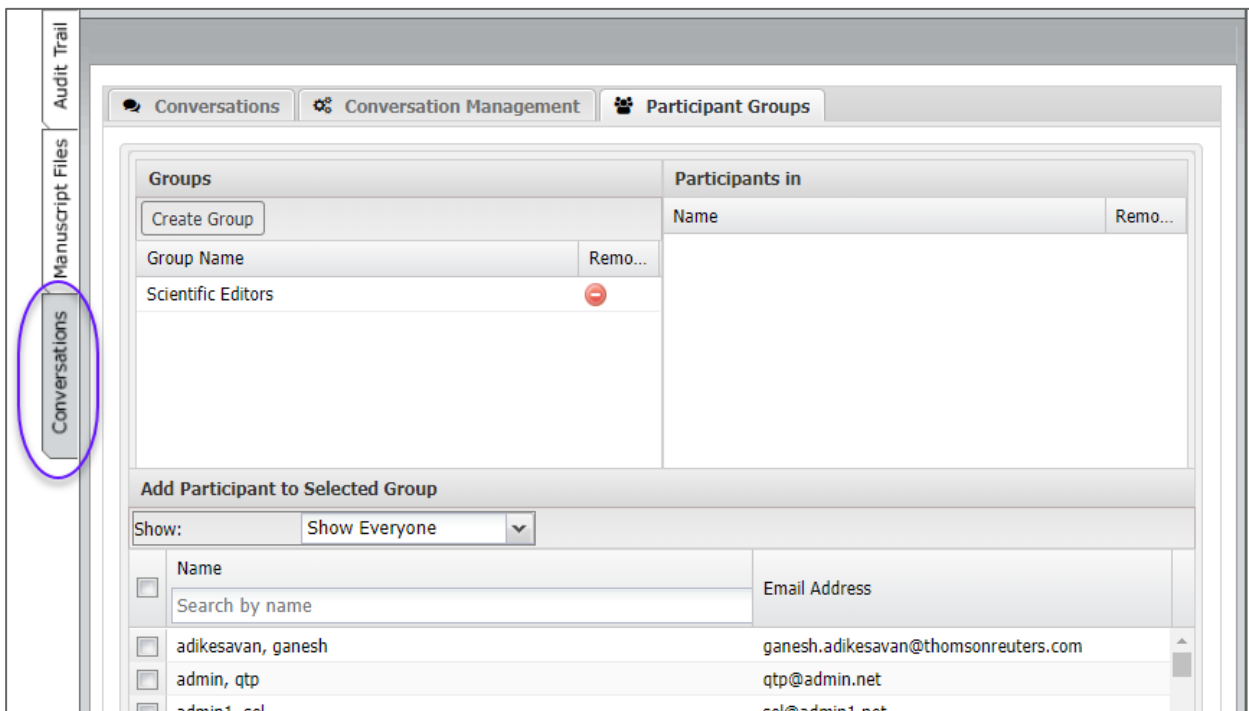
21-January-2019

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CONVERSATION TOOL OVERVIEW

The conversation tool allows for collaboration by the Admin, Editor-In-Chief, and Editor roles based on configuration. This is a way to allow for conversations outside the normal workflow of a site. It can be used for board meetings or just when a second opinion is needed. When the conversation tool is available on a site, it will be accessed via a tab located on the left side of the Manuscript Details. You may have multiple conversations per manuscript with different participants.



CONVERSATIONS ROLES AND PERMISSIONS

Access to the Conversations tool will be limited to Admin and Editorial role types. Each unique role within these two role types may have different permissions assigned. The possible permissions are:

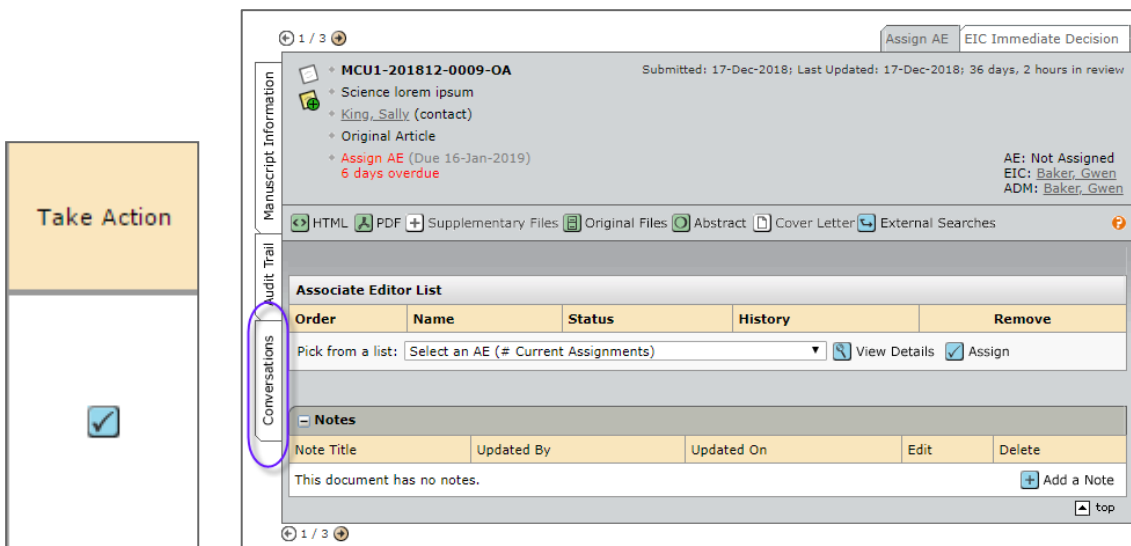
- **Initiate and Close/Reopen Conversations** – Users with this permission will be able to start new conversations on manuscripts to which they have access and add participants to conversations even if they did not initiate the conversation. They will be able to close active conversations and, if needed, reopen previously closed conversations. They will also be able to create conversation groups. They will see the Conversations tab on all manuscripts to which they have access.
- **Participate in Conversations** – Users with this permission will appear as eligible conversation participants for each conversation. If requested to participate by the conversation's initiator, they will be given access to the full manuscript information and have permission to post comments to each conversation for which their comments are requested. Participants who are not assigned to perform tasks on the manuscript (such as reviewer selection) will be able to view the manuscript but not be able to perform tasks. They will see the Conversations tab only on manuscripts in which they have been requested to participate, and when viewing the Conversations tab, will only see conversations in which they have been requested to participate.
- **None** – Users will not see or be eligible to participate in any conversations. This is the default permission level.

Note: Admins will not be able to proxy in as another person to access their conversations.

ACCESSING CONVERSATIONS

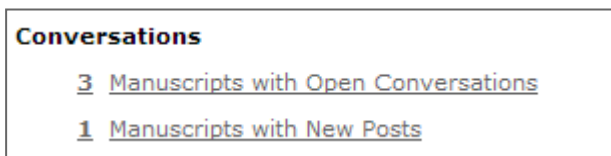
NEW CONVERSATIONS

Each conversation is associated with a specific manuscript. To create a conversation, you must access the manuscript by locating it in one of your dashboard queues and selecting the **Take Action** button. Then, select the Conversations tab on the left of the manuscript to access the Conversation tool.



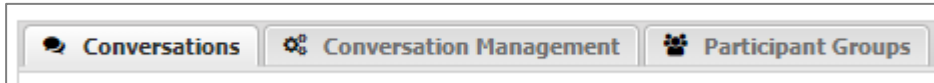
EXISTING CONVERSATIONS

Manuscripts with existing active conversations may also be accessed directly through a dashboard queue.



CREATING AND MANAGING CONVERSATIONS

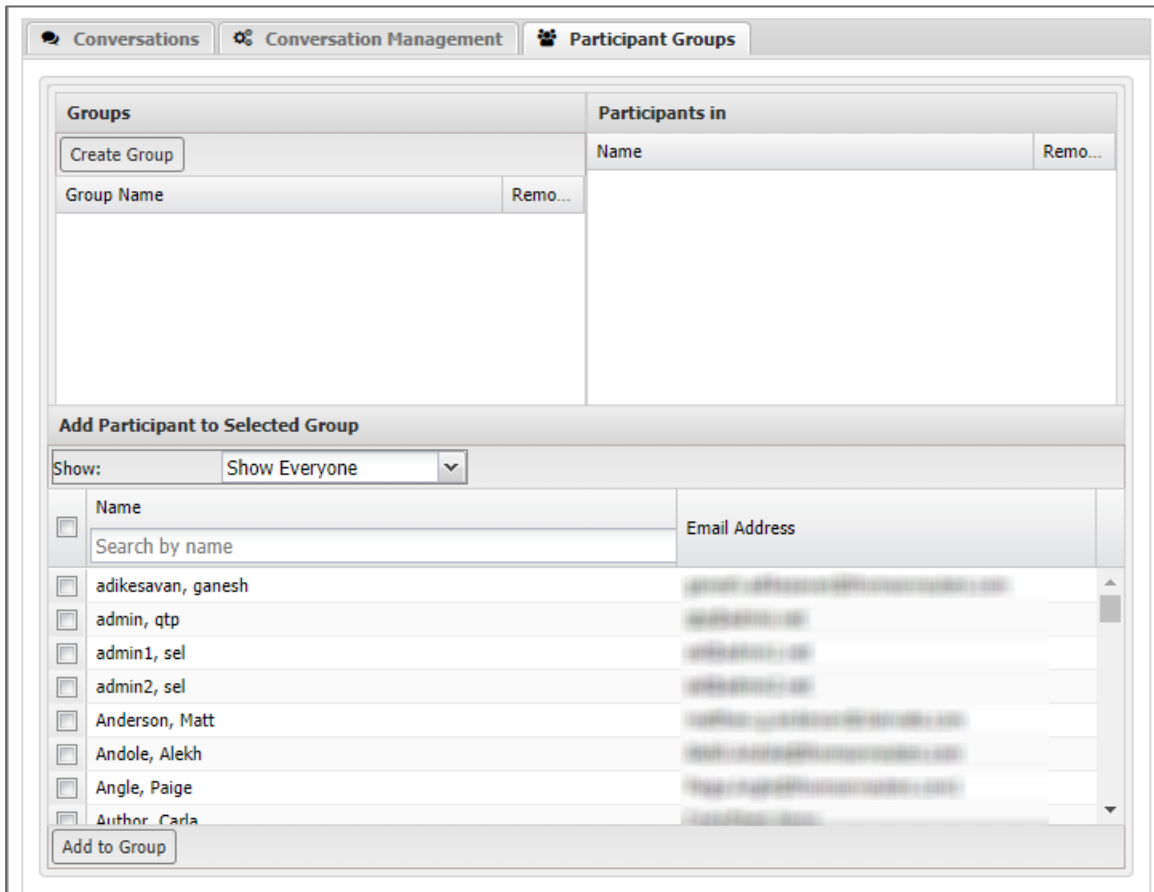
The conversations tool consists of three tabs.



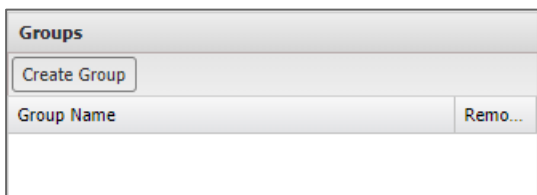
- **Conversations** – allows you to view and create posts in an existing conversation.
- **Conversation Management** – allows you to create and maintain conversations, including adding participants.
- **Participant Groups** – allows you to create groups of participants who may frequently participate in conversations together to facilitate easy creation of conversations.

GROUPS

Groups can be created for common groups of Editors who need to work together on a regular basis regarding submissions. Group members can be added or removed as needed.



To create a group, click the **Create Group** button.



Enter the **Group Name** and click **Save**.

To add participants to your group, select the group name. Select from the list of available participants at the bottom of the screen, then click **Add to Group**.

Name	Email Address
<input type="checkbox"/> Search by name	
<input type="checkbox"/> adikesavan, ganesh	ganesh.adikesavan@clarivate.com
<input type="checkbox"/> admin, qtp	admin@clarivate.com
<input type="checkbox"/> admin1, sel	admin1@clarivate.com
<input type="checkbox"/> admin2, sel	admin2@clarivate.com
<input type="checkbox"/> Anderson, Matt	matt.anderson@clarivate.com
<input type="checkbox"/> Andole, Alekh	alekh.andole@clarivate.com
<input type="checkbox"/> Angle, Paige	paige.angle@clarivate.com
<input type="checkbox"/> Author, Carla	carla.author@clarivate.com

Added participants will appear in the Participants in [group name] pane. You may remove a member from the group by clicking the **Remove** button to the right of their name. You may delete a group by clicking the **Remove** button to the right of the group name.

Name	Remo...
Cooney, Jane	

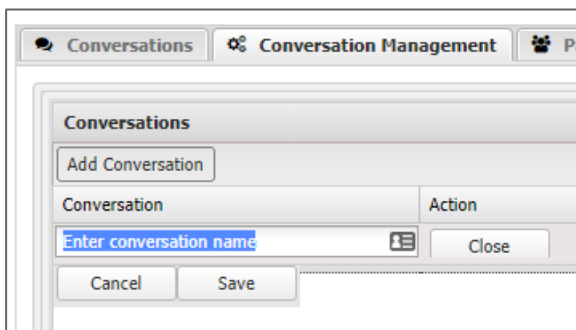
Group Name	Remo...
Scientific Editors	

MANAGE

CREATE A CONVERSATION

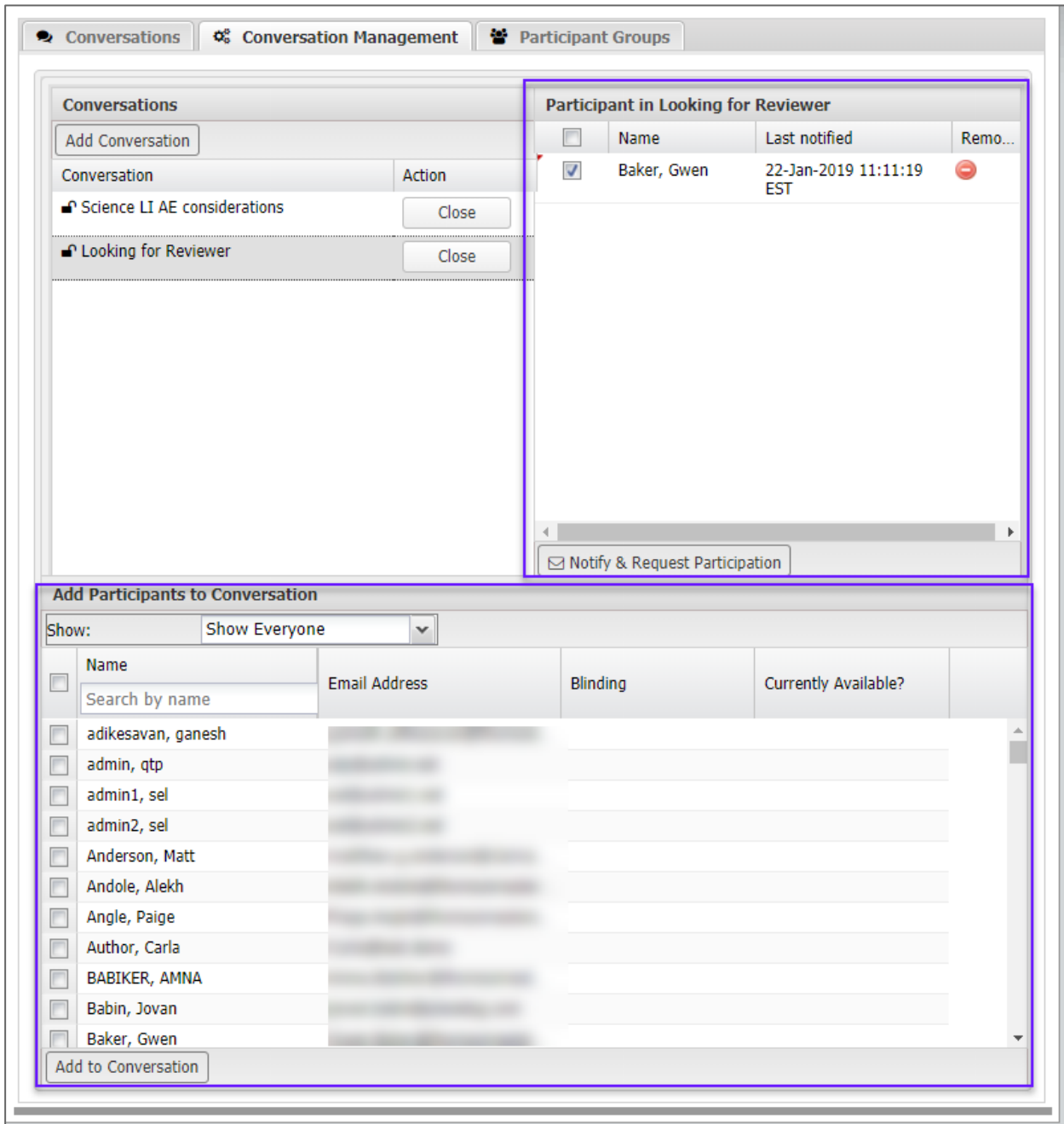
Use the **Conversation Management** tab to create and manage conversations. You may create multiple conversations for each manuscript.

To create a conversation, click the **Add Conversation** button and enter a name for the conversation. Click **Save** to create the conversation.

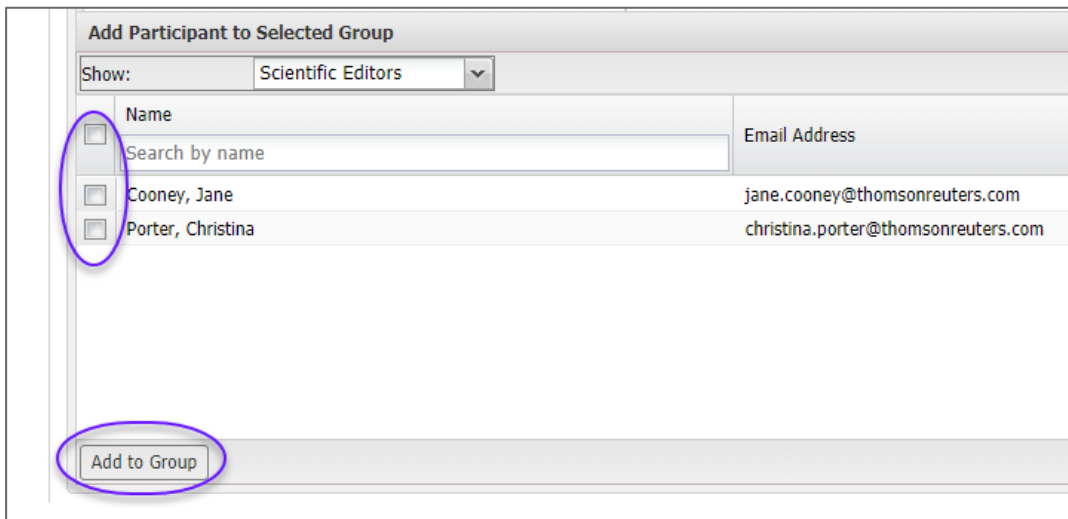
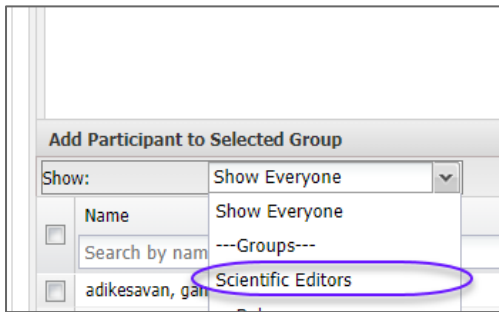


ADD PARTICIPANTS

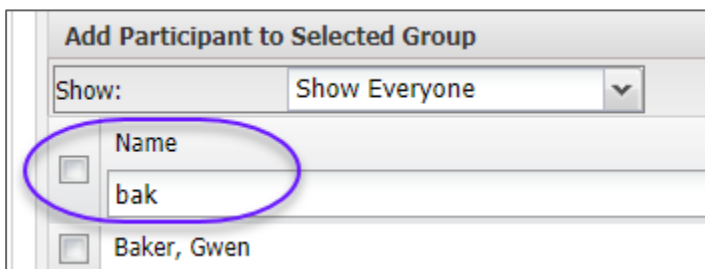
Once the conversation has been created, participants in the conversation can be added from the list. Select the participants from the list at the bottom of the screen and click the **Add to Conversation** button. The participants will display in the **Participants for [conversation name]** pane in the upper right. You may also drag and drop participants from the Select Participants pane to the Participants pane.



Use the **Show:** drop down list to view groups you may have created. From the list of group participants select all, or individually select the desired participants, then click **Add Participants**.



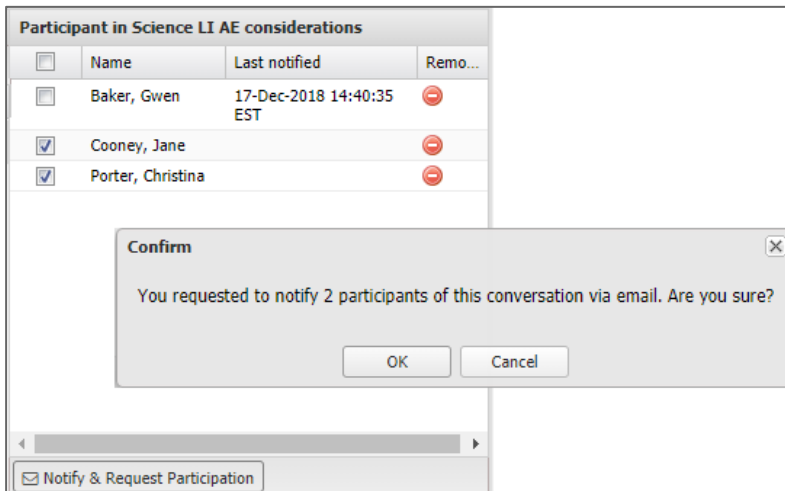
You may also use the **Name (filter)** to locate a specific participant.



If a user is blinded from the paper, their status will be noted in the Blinding column and the system will block attempts to invite them.

NOTIFY PARTICIPANTS

After the participant list has been created, an email can be sent to notify them to join the conversation. Select or de-select participants as needed, then click the **Notify Selected Participants** button. The notification email may be sent multiple times as a reminder email.



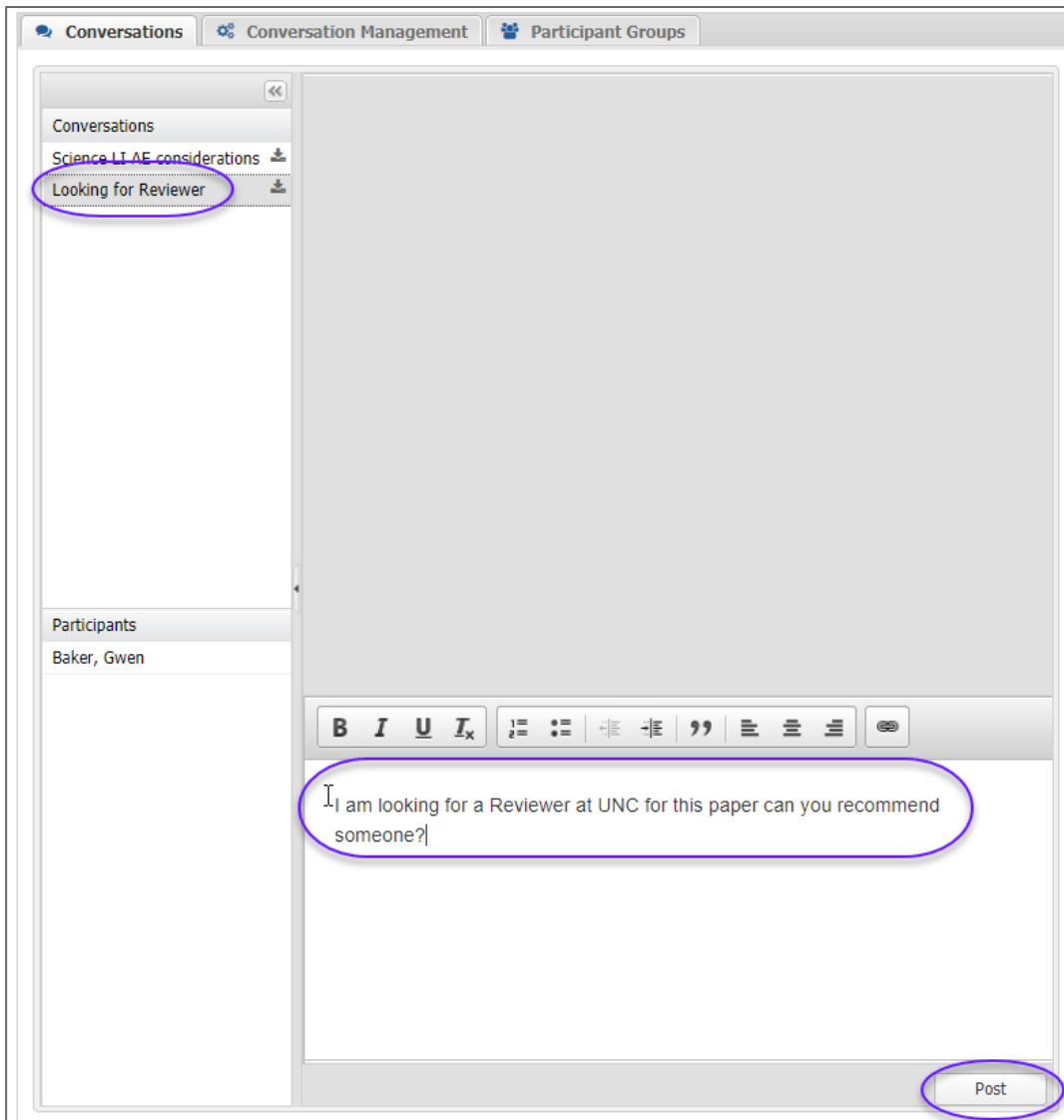
The email is a general notification that contains a link to join the conversation.



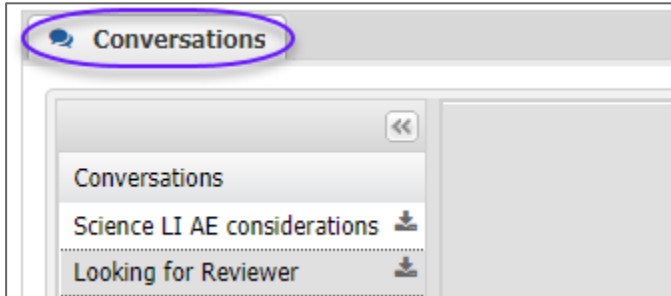
Note: If configured, participants will also receive a weekly email digest of conversations where they are a participant, but have not accessed the conversation in the week. This is intended to generate participation in the conversation.

CONVERSATIONS

After your email notifications have been sent, you can post your initial comment or question. Participants will see the posts and join the conversation. Posts are listed in chronological order. To create a post, select the conversation name in the **Conversations** list on the left. Enter your text in the **Post** field, then click the **Post** button.



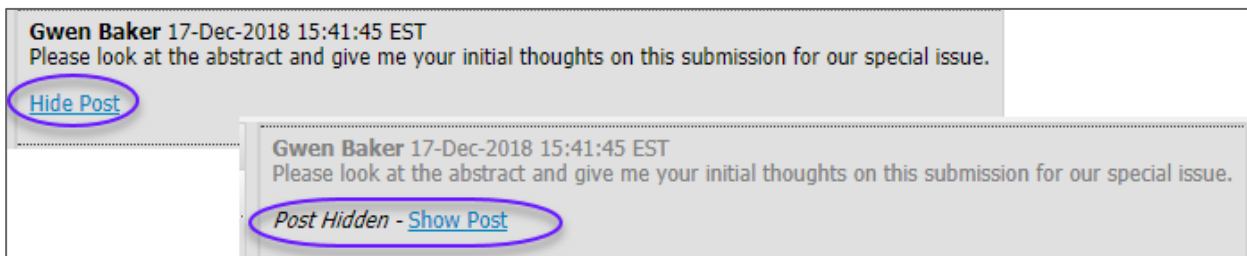
Participants who do not have the ability to start a conversation will only see the **Conversations** tab.



CONVERSATION MAINTENANCE

MODERATING CONVERSATIONS

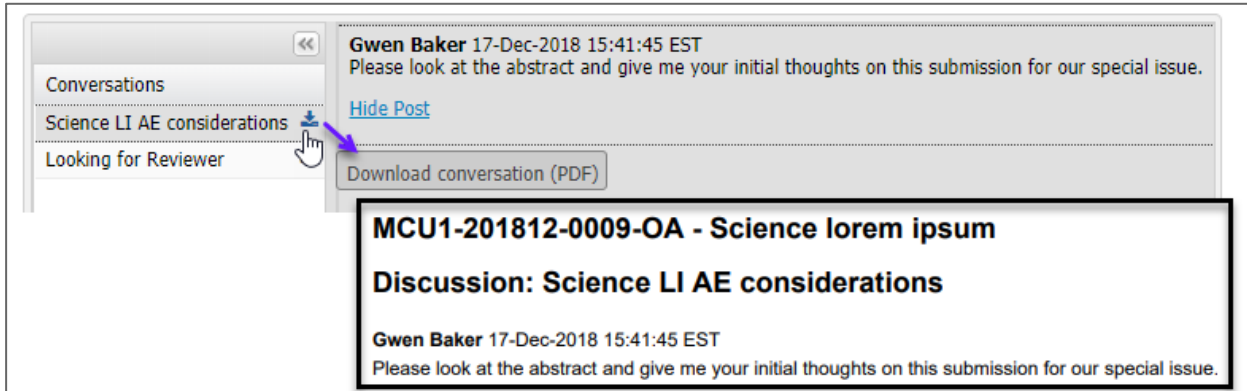
The conversation creator may moderate the conversation by hiding posts. Select the Hide Post link below the post. The post may be un-hidden by clicking the Show Post link on any hidden post.



Note: Hidden posts will be included in the ScholarOne DTD.



DOWNLOAD CONVERSATION

You may download conversation contents. Posts hidden by a moderator will not be included in the download.



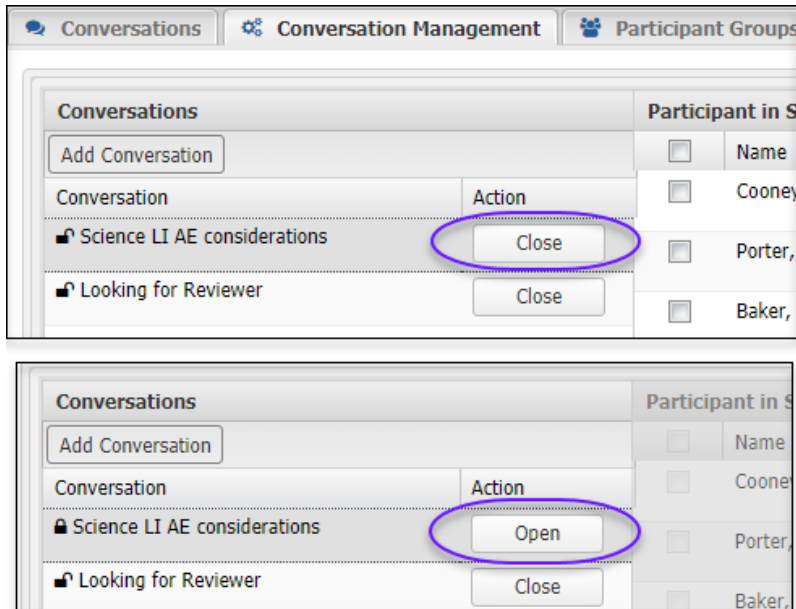
REMOVE PARTICIPANTS

The conversation creator may add or remove participants at any time the conversation is open via the Conversation Management tab. Click the **Remove** button to the right of the participant's name.

Participant in Science LI AE considerations			
<input type="checkbox"/>	Name	Last notified	Remove
<input type="checkbox"/>	Cooney, Jane	17-Dec-2018 15:07:49 EST	
<input type="checkbox"/>	Porter, Christina	17-Dec-2018 15:07:49 EST	

CLOSE CONVERSATIONS

The conversation creator has the ability to close the conversation, closing it to future posts. If needed, a closed conversation can be re-opened.



Note: Conversations cannot be deleted by any user.

EMAIL NOTIFICATIONS

A weekly reminder email may be sent to encourage participation in conversations. The automated email contains a digest of never-before-read conversations since the previous digest email was sent. If a participant has visited a specific conversation, it will not be listed within the digest email.

The email will not be sent when the participant has viewed all conversations at least once in the week, or when the conversation's manuscript is archived.

From: sender@email.com
To: recipient@email.com
CC:
BCC:
Subject: Journal Name – Automated weekly digest of unread conversations

Date
Dear Dr. Name

This is an automated request for your participation in the following conversation(s) since last week:
[Science LI AE Considerations](#)

The link below will take you to a queue with all of your unread conversations:
https://mc-manuscriptcentral.com/site?URL_Mask=abc123def456

Sincerely,
Editor Name

CONVERSATION TOOL REPORTING

COGNOS REPORTS

Conversation data is available for reporting in the Cognos reporting tool. Data elements may be found in the Peer Review Details package, in the Conversations sub-heading. Data elements include:

- Conversation Name
- Conversion Status
- Conversation Original Open Date
- Conversation Final Close Date
- # of Posts

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ScholarOne, a Clarivate Analytics Business, provides comprehensive workflow management systems for scholarly journals, books, and conferences. Its web-based applications enable publishers to manage the submission, peer review, production, and publication processes more efficiently, increasing their profile among authors, decreasing time-to-market for critical scientific data, and lowering infrastructure costs. ScholarOne offers workflow solutions for the submission and review of manuscripts, abstracts, proceedings, books, grants & awards, and production. Supporting over 365 societies and publishers, over 3,400 books and journals, and 13 million users, ScholarOne is the industry leader.

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