

CONFIDENTIAL AND PROPRIETARY

Release Notification



Editorial Manager[®]



ProduXion Manager[®]



Commerce Manager[™]

**Editorial Manager/ProduXion Manager
Version 14.0 Beta Release Notification
3/22/2017**

Copyright © 2017, Aries Systems Corporation

This document is the confidential and proprietary information of Aries Systems Corporation, and may not be disseminated or copied without the express written permission of Aries Systems Corporation. The information contained in this document is tentative, and is provided solely for planning purposes of the recipient. The features *described* for this software release are likely to change before the release design and content are finalized. Aries Systems Corporation assumes no liability or responsibility for decisions made by third parties based upon the contents of this document, and shall in no way be bound to performance therefore.

Editorial Manager/ProduXion Manager 14.0 Beta Release Notification

General Enhancements.....	1
Editor Signposting.....	1
Enhanced Automated Editor Summary Reminders.....	4
Editor Decision Phrases.....	9
Notification Date Column Added to All Submissions with Editor's Decision Folder.....	13
Unavailable Dates Enhancements for Editor Selection.....	14
Unavailable Dates Displayed on Multiple Pages.....	14
Unavailable Dates Included in Search.....	15
Authors Invited Column Added to Proposals with Invitations in Progress Folders.....	16
Discussion Forum Enhancement: Unread Post Indicators.....	17
Suggest/Oppose Reviewers Interface Redesign.....	19
Ranking and Managing Proposed Reviewers.....	20
New Proposed Reviewers Interface for Ranking.....	20
New Proposed Reviewer Flag.....	20
New Reviewer Selection Summary Page Tools.....	21
Reviewer Discovery Proxy Registration Restrictions.....	22
Proxy Registration Interface Enhancements.....	24
Increased Size of Editor Description Field.....	25
Global Identifier for Transferred Submissions.....	26
Passwords for New User Registrations and Password Recovery.....	30
Standard New User Registration.....	30
Proxy Registration.....	30
Password Recovery.....	31
Production Tracking Enhancements.....	32
Additional Details Fields and Flags for Schedule Groups.....	32
BITS Production Task Export for Books.....	35
Merge Field Enhancements.....	37
New Editor Assignment Summary Merge Fields.....	37
Editor Decision Phrases for Notify Author Letter.....	37
Global Manuscript Identifier.....	37
Password-Related Merge Field Updates.....	37

General Enhancements

Editor Signposting

In the Editorial Manager workflow, submissions progress through the process of evaluation and publication based on document status. Submissions are placed in folders related to their current status and the type of action they require next. On the Editor Main Menu page, a user can see names of folders, most followed by a number indicating the number of submissions in that folder.

In earlier versions of EM, from the Main Menu a user could not tell how long the various submissions had been in the folder or how the submissions should be prioritized.

EM 14.0 introduces color-coded signposts that enable Editors to see at a glance which folders contain submissions that require attention most urgently. The publication can define the time thresholds for each status to highlight submissions by priority:

- **On Schedule:** green
- **Need Attention:** amber
- **Late:** red

Threshold settings can be adjusted at any time as processes and submission handling change.

Detail of Editor Main Menu showing color-coded status signposts



Color-coding extends into the folders, where Editors can see which individual submissions require attention relative to the time thresholds.

Detail of Editor folder showing example of color-coding

▲▼	□ Action ▲▼	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼
	View Submission Details History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary View Reviews and Comments Set Final Disposition Initiate Production	SAMDEV140-D-17-00005	Original Study	Basic Science Section	Busy People	Lois Lane, PhD	Feb 16, 2017	Mar 13, 2017	Required Reviews Completed
	View Submission Details History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production	SAMDEV140-D-17-00020	Special Issue QA3		Testing again TT31202 3-14-17 Blizzard day.	Fran Forest	Mar 14, 2017	Mar 14, 2017	With Editor
	View Submission Details History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production	SAMDEV140-D-17-00022	Original Study		A Study of Spring	Rocky Rhodes	Mar 16, 2017	Mar 16, 2017	With Editor
	View Submission Details History File Inventory Edit Submission Classifications Unassign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production Submit Editor's Decision and Comments	SAMDEV140-D-17-00023	Original Study		Snow Crystals	Oliver Ocean	Mar 16, 2017	Mar 16, 2017	With Editor

TO CONFIGURE:

In PolicyManager, under General Policies, select Configure Warning Thresholds to set the "Needs Attention" and "Late" times. (These determine the amber and red color-coding for the signposts.)

Partial view of Configure Warning Thresholds page

Configure Warning Thresholds

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

- If an Editor has permission to view them, color bars that look like traffic lights are displayed on an Editor's Main Menu to summarize how long the submissions have been in a folder, (e.g. ``). Similarly, in folders, individual submissions are marked with a color to indicate how long they have been there.
- Automated Editor Summary Reminders use the thresholds to determine whether to send a reminder when one is due, and if one is due, to indicate how long the submissions have been in the folders.

The number of days that a submission has been in a folder indicates whether it is: 'On Schedule', 'Needs Attention' or 'Late':

- 'On Schedule' (green): < than the number of days specified for 'Needs Attention'
- 'Needs Attention' (amber): ≥ the number of days specified for 'Needs Attention' but < the number of days specified for 'Late'
- 'Late' (red): ≥ the number of days specified for 'Late'

(less...)

Editorial Submissions in Progress

Needs Attention:	10	Days since submission began
Late:	20	Days since submission began

Transferred Submissions

Needs Attention:	10	Days since initial date submitted
Late:	20	Days since initial date submitted

New Submissions

Needs Attention:	10	Days since initial date submitted
Late:	20	Days since initial date submitted

Then in RoleManager, update each Editor Role for which the Main Menu signposting should appear. On the Edit Role Definition page, under General Searching and Viewing, check the box next to "View Warning Status Signposts".

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

Enhanced Automated Editor Summary Reminders

In Editorial Manager and ProduXion Manager, a publication can configure Automated Editor Summary Reminders (AESR). These are reminder emails sent to Editors on a regular interval (by the nightly EM Batch process) that summarize an Editor's assignments from three key folders in the Editor To-Do List section on the Editor Main Menu page: New Invitations, New Assignments, and Required Reviews Complete.

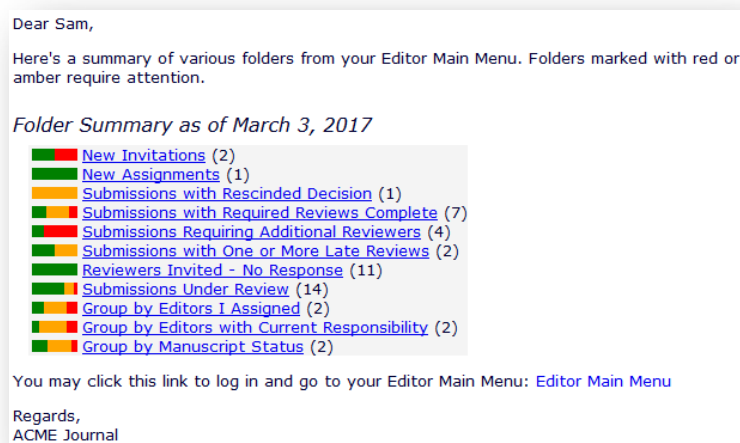
In EM 14.0, AESRs can provide information from more sources. The enhanced AESR pulls from up to 11 assignment-related Editor Main Menu folders. Both the folder summary and the details report can include folders from the Editor To-Do List and Subordinate Editor's Pending Assignments sections. In addition, the details report also pulls in information on the Review Status for submissions (but not Reviewer names). The enhanced reminders also feature an easier-to-read and more visually appealing format.

For Rich Text (HTML) emails, the new format uses the same color-coding as the Editor Signposting enhancement (above) to show the percentages of submissions in a folder that are:

- **On Schedule:** green
- **Need Attention:** amber
- **Late:** red

The email recipient can see at a glance which folders have assignments that need attention or that are behind schedule. The emails can be configured to show a folder summary and/or submission lists. The Rich Text (HTML) letter format displays the color-coding. Folder names can be listed in the letter as deep links that will log the recipient into Editorial Manager and go directly to the folder. A plain text version of the AESR (which does not display color-coding or enhanced formatting) is also available.

AESR email, showing folder summary with enhanced, color-coded information



Submission lists show the contents of Editor folders, including details such as title, author(s), abstract, and review status, as well as a color-coded outline to indicate whether submissions need attention.

AESR email, showing submission lists with enhanced, color-coded information

Dear Sam,

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

Submission Lists as of March 3, 2017

New Invitations (2)

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

New Assignments (1)

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

Submissions with Rescinded Decision (1)

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

This enhancement creates two new merge fields for use **only** in AESRs:

- %EDITOR_REMINDER_FOLDER_SUMMARY% pulls in the Folder Summary, as shown in the screenshot above, that is configured for a particular Editor Role's AESR
- %EDITOR_REMINDER_SUBMISSION_LISTS% pulls in the Submission Lists, as shown in the screenshot above, for the folders configured for a particular Editor Role's AESR

AESRs are configurable by Editor Role to include any or all of the 11 assignment-related Editor Main Menu folders.

In addition, the enhancement introduces two similar merge fields for use in **any** letter to an Editor whose Editor Role has the "Receive Assignments" permission:

- %EDITOR_ASSIGNMENT_FOLDER_SUMMARY%
- %EDITOR_ASSIGNMENT_SUBMISSION_LISTS%

These two any-letter fields summarize information from all 11 assignment-related Editor folders (excluding the New Invitations folder if the recipient Editor role does not have permission to receive invitations for assignments). The content of these merge fields includes information for all 11 folders, not just for the folders configured for a particular Editor's AESR, since these can be used in letters not associated with an AESR.

TO CONFIGURE:

To configure new AESR functionality, log in to PolicyManager and, under General Policies, select Configure Warning Thresholds to set the "Needs Attention" and "Late" times. (Otherwise, the color-coding in HTML emails will reflect EM default settings for the time thresholds.)

Partial view of Configure Warning Thresholds page

Configure Warning Thresholds

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

Editorial Submissions in Progress

Needs Attention: Days since submission began

Late: Days since submission began

Transferred Submissions

Needs Attention: Days since initial date submitted

Late: Days since initial date submitted

Next, under E-mail and Letter Policies, select Edit Letters to edit an existing letter (or create a new one) in the Editor Reminder letter family. Choose Rich Text (HTML) Letter Format for recipients to see color-coded information.

In existing letters, exchange the old Editor folder–related merge fields for the two new AESR merge fields:

- %EDITOR_REMINDER_FOLDER_SUMMARY%
- %EDITOR_REMINDER_SUBMISSION_LISTS%

Note: For AESRs already set up prior to upgrading to EM 14.0, the reports and emails will continue to run as configured with existing merge fields, but they will not feature any the enhancements described above.

These are the existing fields for which the new AESR merge fields can be substituted:


- %EDITOR_NEW_INVITATIONS_TOTAL%
- %EDITOR_NEW_INVITATIONS_DAYS%
- %EDITOR_NEW_INVITATIONS_SUBMISSIONS%
- %EDITOR_NEW_INVITATIONS_SUBMISSIONS_WITH_DEEP_LINKS%
- %EDITOR_NEW_INVITATIONS_FOLDER_DEEP_LINK%
- %EDITOR_NEW_ASSIGNMENTS_TOTAL%
- %EDITOR_NEW_ASSIGNMENTS_DAYS%
- %EDITOR_NEW_ASSIGNMENTS_SUBMISSIONS%
- %EDITOR_NEW_ASSIGNMENTS_FOLDER_DEEP_LINK%
- %EDITOR_REQUIRED_REVIEWS_COMPLETE_TOTAL%
- %EDITOR_REQUIRED_REVIEWS_COMPLETE_DAYS%
- %EDITOR_REQUIRED_REVIEWS_COMPLETE_SUBMISSIONS%
- %EDITOR_REQUIRED_REVIEWS_COMPLETE_FOLDER_DEEP_LINK%


Finally, go to Configure Automated Summary Reminders (under Editor Assignment Policies) to set up the reminders for Editor Roles with permission to receive assignments. Check the boxes for folders to include and indicate (by selecting a radio button) when to include the folder's information: always, only if items need attention, or only if items are late. These designations correspond to the color-coding. To include Author List and/or Abstract, check the applicable boxes.

Partial view of Automated Summary Reminders setup page

Editor ☒ Send Reminders

Frequency (Days)*




Next Reminder Due 

Summary Letter* 

Include Author List ☒

Include Abstract ☒

Include Folders*

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

To communicate Editor-assignment information outside of AESRs, use one or both of these new merge fields:

- %EDITOR_ASSIGNMENT_FOLDER_SUMMARY%
- %EDITOR_ASSIGNMENT_SUBMISSION_LISTS%

These fields can be used in letters to any Editor role with permission to receive assignments, such as Manual Editor Reminder and Ad Hoc from Editor letters.

Editor Decision Phrases

In previous versions of EM, Editors who routinely made the same comments during the decision process had to repeatedly type or cut and paste those comments each time they submitted a decision. For high-volume publications, this can be a time-consuming (and error-prone) process for Editors, who often need to enter the same comments several times a day. In addition, different Editors may use different language in communicating decisions, resulting in inconsistency in messaging coming from a publication.

This EM 14.0 enhancement enables publications to provide a consistent voice when communicating editorial decisions in letters to Authors while saving Editors time. Editors can quickly add publication-defined, regularly used comments directly into the decision letter, without the need to type them each time. This is accomplished by creating and sharing among Editors a collection of Editor Decision Phrases to be used in decision letters to Authors.

First, publications create the pool of Editor Decision Phrases to be used in decision letters. Then they can configure Editor Forms to use selected Editor Decision Phrases (based on the Editor Role/Article Type configuration).

When Editors access the Editor's Decision and Comments page to submit a decision, they can select any, all, or none of the configured Editor Decision Phrases to include in the letter. This makes it quicker and easier for Editors to provide comments. The choices each Editor makes are passed up the Editor Chain (if applicable), showing as checked boxes on the upper level Editor's page.

Detail of Editor Decisions and Comments page showing configured Decision Phrases

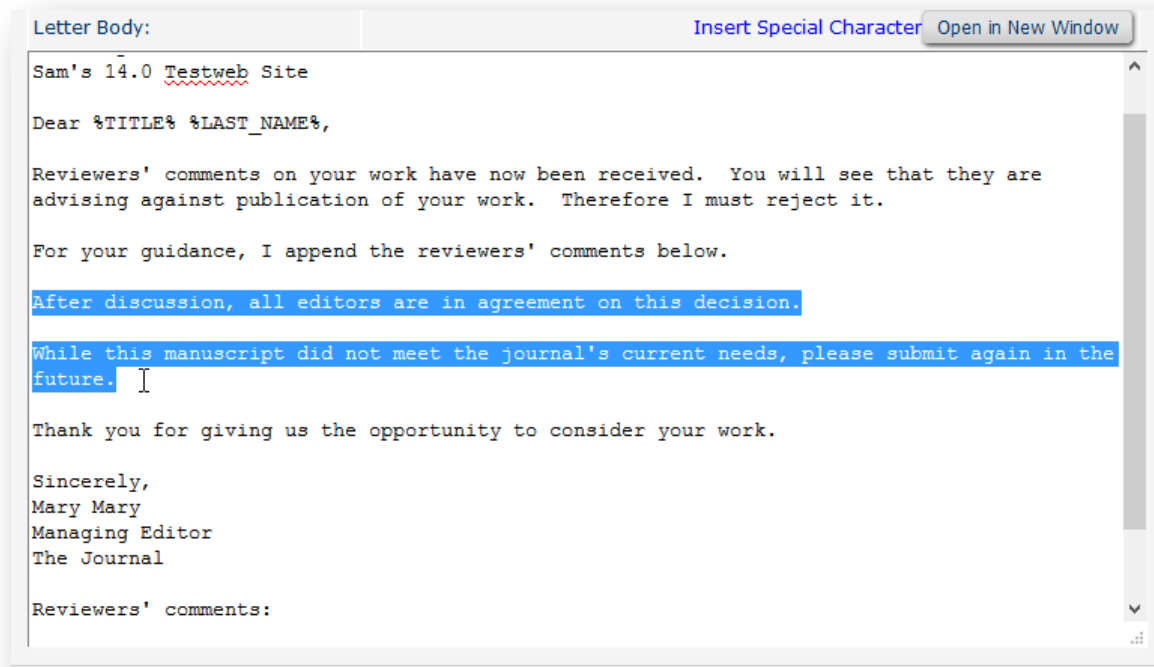


The screenshot shows a web interface titled "Editor Decision Phrases". At the top right is a button labeled "Preview Selected Phrases". Below the title, a text box states: "Editor Decision Phrases available for inclusion in the Decision Letter are displayed below. Select the phrases you wish to include." Below this is a table with two columns: "Select" and "Phrase".

Select	Phrase
<input checked="" type="checkbox"/>	After discussion, all editors are in agreement on this decision.
<input type="checkbox"/>	Your submission may be suitable for the Publisher's new online-only journal. See newjournal.org for more information.
<input type="checkbox"/>	While this manuscript did not meet the journal's current needs, please submit again in the future.

Phrases selected by any participant in the Editor Chain populate a new merge code (%EDITOR_DECISION_PHRASES%) when the letter is generated, as long as the merge code is included in the Decision Letter template. The phrases appear in the letter as separate paragraphs. The letter, including the Decision Phrases, can be edited by the Editor responsible for notifying the Author.

Detail of editable letter on Notify Author page with Decision Phrases highlighted



The screenshot shows a web-based editor for a letter body. At the top, there are tabs for 'Letter Body:', 'Insert Special Character', and 'Open in New Window'. The letter text is as follows:

Sam's 14.0 Testweb Site

Dear %TITLE% %LAST_NAME%,

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

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

After discussion, all editors are in agreement on this decision.

While this manuscript did not meet the journal's current needs, please submit again in the future. I

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

Sincerely,
Mary Mary
Managing Editor
The Journal

Reviewers' comments:

The phrases 'After discussion, all editors are in agreement on this decision.' and 'While this manuscript did not meet the journal's current needs, please submit again in the future. I' are highlighted in blue.

TO CONFIGURE:

In PolicyManager, go to the Editor Decision Policies section. First, click the link to the Configure Editor Decision Phrases page. On the page, click "Add Editor Decision Phrase" to open a popup window. Enter the phrase, save, and continue to add more phrases as needed.







Follow steps to configure using these three links

- Editor Decision Policies**
- [Edit Editor Decision Terms](#)
- 1** [Configure Editor Decision Phrases](#)
- 2** [Create Editor Forms](#)
- 3** [Configure Editor Forms](#)
- [Editor Manuscript Rating Question Configuration](#)

Add Editor Decision Phrase link (circled) opens the popup window below

Configure Editor Decision Phrases

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

Current Editor Decision Phrase List		+ Add Editor Decision Phrase
		After discussion, all editors are in agreement on this decision.
		Your submission may be suitable for the Publisher's new online-only journal. See newjournal.org for more information.
		While this manuscript did not meet the journal's current needs, please submit again in the future.

[+ Add Editor Decision Phrase](#)





[Create Editor Forms](#)

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

[Return to PolicyManager](#)

Add Editor Decision Phrase popup window

Add Editor Decision Phrase

    [Insert Special Character](#)

Enter an Editor Decision Phrase. Phrases can be associated with an Editor Form, submitting a decision, and then used in the Decision Letter.

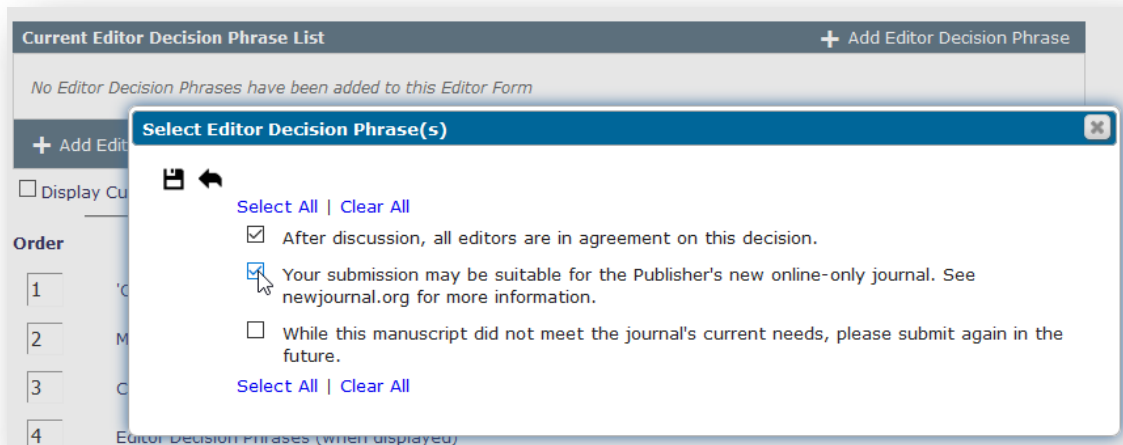
[Save this Editor Decision Phrase And Add Another](#)

Editor Decision Phrase*

Second, create new (or edit existing) Editor Forms where the decision phrases will be used. A link to the Create Editor Forms page is available on the Configure Editor Decision Phrases page (see arrow in image above, top) and in the PolicyManager main menu.

On the Add/Edit Editor Form page, find the Current Editor Decision Phrase List section below the text box for Confidential Comments to Editor. (If no Decision Phrases have been configured, this section will not appear.) Clicking the Add Editor Decision Phrase link launches a popup window displaying configured phrases. Check the appropriate ones to include in the particular editor form and click the Save icon. The selected phrases then appear on the main form page.

Popup window for selection of Editor Decision Phrases for an Editor form



Third, after phrases have been added to the forms, navigate to the Editor Form Configuration page (from the PolicyManager main menu or from the link on the Configure Editor Decision Phrases page) to match the appropriate form to each Editor Role and Article Type.

Detail of Editor Form Configuration page

Editor Form Configuration

In the grid below, please specify the Editor Form used for each Article Type / Editor Role combination. The Editor Form selected will be used for the "Confidential Comments to Editor" box that Editors see on the Submit Editor Decision page.

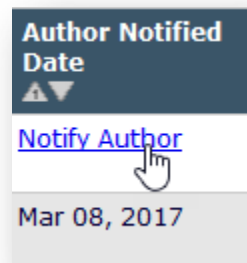
Editor Role / Article Type	Managing Editor	Section Editor	Editor in Chief
Original Study	Default Editor Form New Editor Form	New Editor Form	New Editor Form
APC Optional (this is a really long Article Type Name for testing purposes)	New Editor Form	New Editor Form	New Editor Form
APC Required	New Editor Form	New Editor Form	New Editor Form
13.0-02 Optional APC	New Editor Form	New Editor Form	New Editor Form
Editorial	Default Editor Form	Default Editor Form	Default Editor Form
Review	Default Editor Form	Default Editor Form	Default Editor Form

Notification Date Column Added to All Submissions with Editor's Decision Folder

In previous versions of EM, Editors would manually sort through submissions in the All Submissions with Editor's Decision folder to identify which Authors had received Decision Letters, and which had not. For publications that handle large volumes of submissions, this can be a slow, cumbersome process.

EM 14.0 enhances this folder by introducing a new column: Author Notified Date, which makes information related to notification more visible. The column is sortable, so that all submissions requiring author notification can be quickly located.

For Editors with RoleManager permissions to "Notify Author of Editor's Decision when Editor Chain is Complete" the column displays a Notify Author action link if the Author has *not* been notified of the Editor's decision. (This performs exactly like the current Notify Author link displayed in the existing Action column.) Once an Author is notified, the column displays the date the notification was sent (in journal-defined date format).



For Editors who do not have the "Notify Author of Editor's Decision when Editor Chain is Complete" permission enabled, the action link is not displayed. The column appears blank until the notification letter is sent, at which time the notification date displays.

TO CONFIGURE:

No configuration is necessary.

What individual Editors see depends on what permissions they have been assigned by the system administrator through RoleManager.

Unavailable Dates Enhancements for Editor Selection

In Editorial Manager, users can identify dates for which they are "unavailable" by entering this information on the Update My Information page, on the Search People – Update Information page, through an Update Unavailable Dates deep link in an email, or via the Unavailable Dates link on the Author Main Menu (if configured to display).

New in EM 14.0, Unavailable Dates information appears more prominently for more efficient access in the editorial workflow.

Unavailable Dates Displayed on Multiple Pages

This enhancement displays the actual start/end dates beneath the Unavailable link on the following pages:

- Assign Editor (single Editor selection)
- Assign Editor Chain
- Reassign Editors
- Editor Selection Summary (Assign Editor Using Suggested Editor Queue)
- Search for Editors to Invite (Assign Editor Using Suggested Editor Queue)
- Initiate Discussion/Add Participants

The user can click the Unavailable link to launch the Unavailability Information popup which shows the reason the Editor is unavailable and substitute contact information, if provided.

Note: Being "unavailable" does not preclude a person from being invited or assigned, but Editors can take this information into consideration when evaluating the appropriate person to handle an assignment.

Unavailable dates shown on Assign Editor page; column header range is configurable (see To Configure information below)

Assign Editor

Title: DW Griffith

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you to choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as

Click the Blind Editors link to block access to this submission for one or more Editors.

[Blind Editors](#)

Cancel

Send Custom Letters

Send Default Letters

Search Again

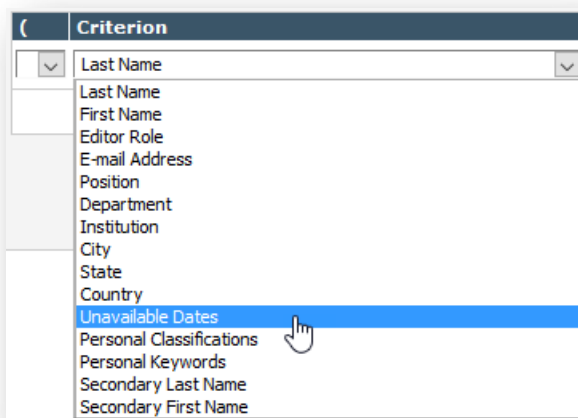
Page: 1 of 1 (4 total People Matches)

Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Editor	Ed Editor, PhD	2	3		Unavailable Mar 07, 2017 - Mar 12, 2017
<input type="radio"/>	Editor	Emily Editor	0	3		Yes

Unavailable Dates Included in Search

The ability to search by "Unavailable Dates" is also added on the above pages.



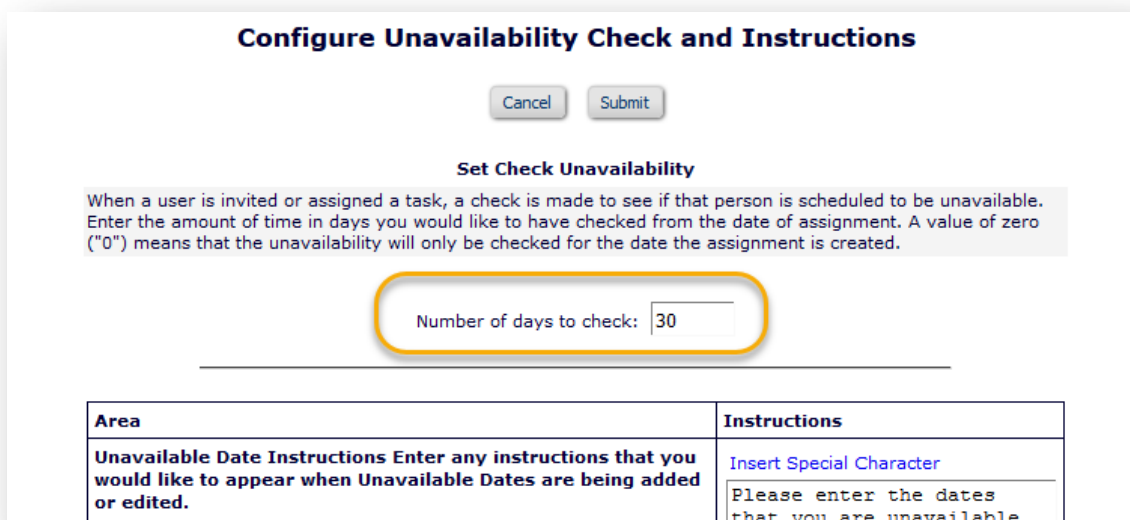
A screenshot of a search criteria dropdown menu. The menu is titled "Criterion" and has a search box containing "Last Name". Below the search box, a list of criteria is displayed, including "Last Name", "First Name", "Editor Role", "E-mail Address", "Position", "Department", "Institution", "City", "State", "Country", "Unavailable Dates", "Personal Classifications", "Personal Keywords", "Secondary Last Name", and "Secondary First Name". The "Unavailable Dates" option is highlighted in blue, and a mouse cursor is pointing at it.

TO CONFIGURE:

If a system administrator has already set up Unavailability Check and Instructions, no new configuration is necessary to display Unavailable Dates information on the pages listed above.

To configure Unavailability Check and Instructions: In PolicyManager, under General Policies, click the link to the Unavailability Check and Instructions page. Specify the number of days to check for user availability.

Configure Unavailability Check and Instructions page: the 30 days highlighted corresponds to the column header as on the Assign Editor page (see previous page)



A screenshot of the "Configure Unavailability Check and Instructions" page. The page has a title bar with "Cancel" and "Submit" buttons. Below the title bar, there is a section titled "Set Check Unavailability" with a description: "When a user is invited or assigned a task, a check is made to see if that person is scheduled to be unavailable. Enter the amount of time in days you would like to have checked from the date of assignment. A value of zero ('0') means that the unavailability will only be checked for the date the assignment is created." Below this description, there is a text input field labeled "Number of days to check:" with the value "30" entered. At the bottom of the page, there is a table with two columns: "Area" and "Instructions". The "Area" column contains the text "Unavailable Date Instructions Enter any instructions that you would like to appear when Unavailable Dates are being added or edited." The "Instructions" column contains the text "Insert Special Character" and "Please enter the dates that you are unavailable."

Area	Instructions
Unavailable Date Instructions Enter any instructions that you would like to appear when Unavailable Dates are being added or edited.	Insert Special Character Please enter the dates that you are unavailable.

Authors Invited Column Added to Proposals with Invitations in Progress Folders

In EM 13.1, the three folders—Proposals With Outstanding Invitations, Proposals With Invited Submissions In Progress, and Proposals With Invited Submissions Received—all feature the same informational columns, where Editors can view information such as the number of Authors invited, accepting, and declining. However, there is no information identifying those Authors.

This EM 14.0 enhancement adds a new Authors Invited column to each of the three folders. The column displays the name of each invited Author, formatted as a link to the People Information popup for that Author. Authors assigned directly, without invitation, are also included in this column; they are treated like Authors with accepted invitations.

# of Authors Invited ▲▼	# of Authors Accepting ▲▼	# of Authors Declining ▲▼	# of Author Submissions ▲▼	Authors Invited
4	0	0	0	Fran Forest; Harriet Hill; Michael Mountain; Oliver Ocean;

TO CONFIGURE:

No configuration is necessary.

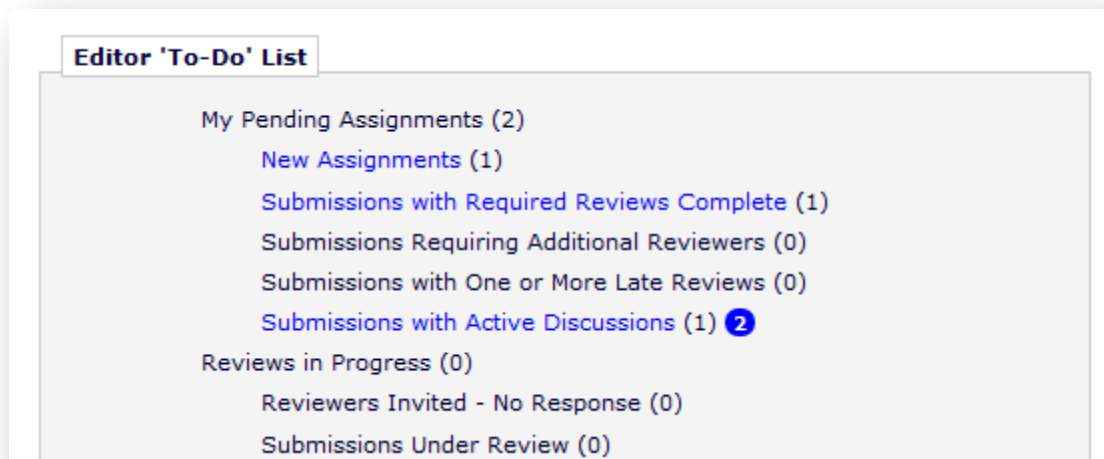
Discussion Forum Enhancement: Unread Post Indicators

In previous versions of EM, a number in parentheses next to the Submissions with Active Discussions folder showed Editors how many submissions had active discussions in progress. However, there was no way for the Editors to know whether there were posts they had not read in any of those discussions.

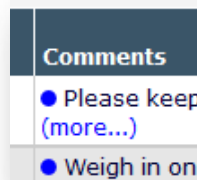
An EM 14.0 enhancement introduces a visual indicator that displays near discussion-related items to alert the Editors to unread posts in discussions in which they are an active participant or initiator. This new indicator is also used for Reviewer discussions.

The discussion "badge" shows as a blue circle with a white number in it (1) that indicates the number of unread posts. Depending on where it is displayed, the badge indicates the number of unread posts for a single discussion, or for multiple discussions for one submission, or for discussions for more than one submissions.

Sample discussion post indicator on the Editor Main Menu



In addition, when the user drills down to the Discussion page to see any unread posts for a particular discussion, each comment posted since the user's last visit is marked with a blue dot.



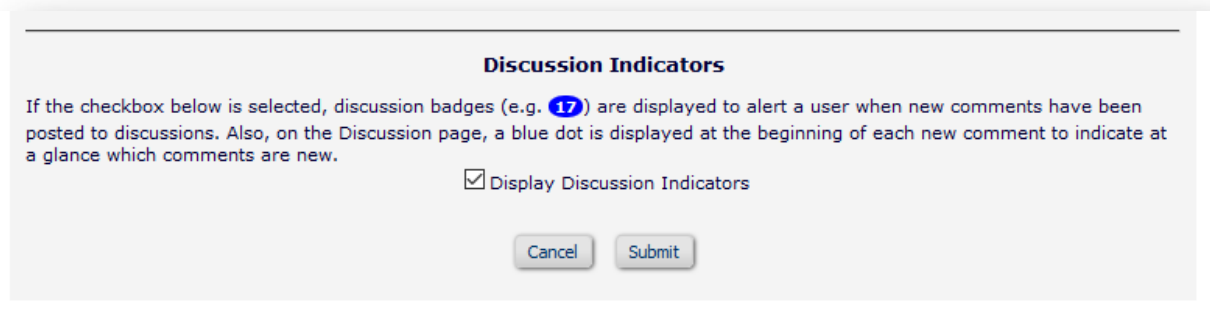
Note: The number of unread posts displayed in a badge includes only the unread posts for *open* discussions for which the user is an *active* participant/initiator. Unread posts in closed discussions are not included. If a discussion is re-opened, the discussion badges are displayed again for *active* discussion participants for that discussion.

TO CONFIGURE:

In PolicyManager, a system administrator can initiate the use of discussion indicators on the Configure Discussion Forum Settings page (via the link in the Discussion Forums section of the main menu). Select the Display Discussion Indicators checkbox at the bottom of the page.

No new permissions are needed for Editor or Reviewer roles.

Discussion Indicators section of Configure Discussion Forum Settings page



The screenshot shows a configuration window titled "Discussion Indicators". The text inside explains that if the checkbox is selected, discussion badges (e.g., 17) will be displayed to alert users when new comments are posted. It also mentions that a blue dot will be displayed at the beginning of each new comment to indicate new comments at a glance. The checkbox "Display Discussion Indicators" is checked. At the bottom, there are "Cancel" and "Submit" buttons.

Discussion Indicators

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

☒ Display Discussion Indicators

Cancel Submit

Suggest/Oppose Reviewers Interface Redesign

In previous versions of EM, the Suggest/Oppose Reviewers step was occasionally prone to user error due to the placement and behavior of buttons on the page. The Add Reviewer button (which performs the "save" action) and the Previous and Next buttons (which refers to the overall submission process and not to the Suggest/Oppose Reviewers step and actually move the user off the Suggest/Oppose Reviewers page) were often cause for confusion.

In EM 14.0 the Suggest/Oppose Reviewers submission step is redesigned to improve the overall Author experience. A new popup window (with overlay to protect the underlying page while the user is entering information) features updated styling and icons (save, save and add another, back, and clear form).

New Suggested Reviewer popup (the Opposed Reviewer popup is identical)

Current Suggested Reviewers List + Add Suggested Reviewer

Reviewer
Oliver Ocean,

+ Add Suggested Reviewer

Enter Suggested Reviewer Details

Save this And Add Another

Given/First Name * Gloria

Middle Name

Family/Last Name * Glacier

Degree

Position

Institution

Department

E-mail

Reason

Insert Special Characters

TO CONFIGURE:

No configuration is necessary.



Ranking and Managing Proposed Reviewers

Some publications follow a workflow in which certain Editor roles are responsible for proposing Reviewers and other Editor roles (journal staff) are responsible for inviting the proposed Reviewers. In previous versions of EM, Editors proposing Reviewers could indicate in a Notes field their order of preference for inviting the Reviewers, so staff would invite the preferred candidates first; however, this functionality did not facilitate efficient prioritization and selection of the proposed Reviewers.

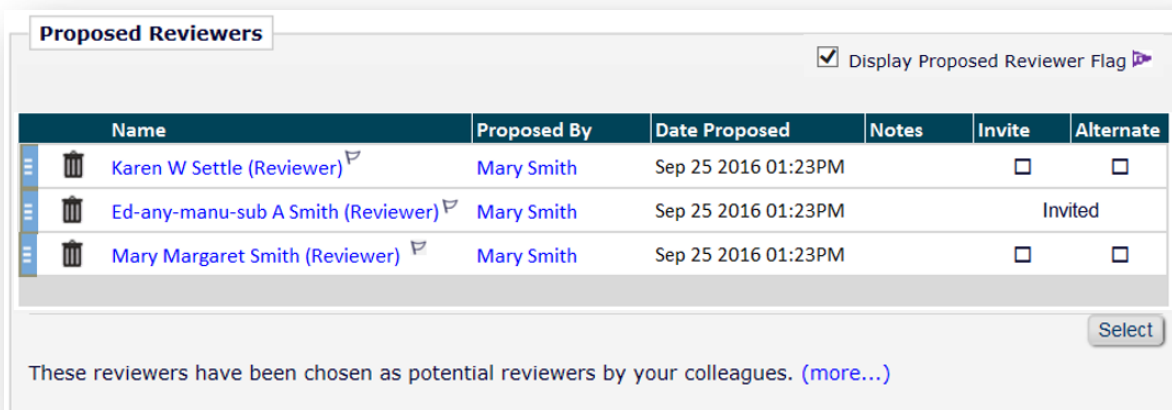
In EM 14.0, Editors can now rank and manage proposed Reviewers more efficiently.










New Proposed Reviewers Interface for Ranking

As Editors add new candidates to an existing Proposed Reviewer list, the new names are appended to the bottom of the list in the order they are proposed and the numbering continues in ascending order. The interface (below) displays the name of the Reviewer, proposing Editor, date the Reviewer was Proposed, any notes that may have been entered during the proposal, and options to invite or list the Reviewer as an alternate as needed.

A grip tool () with drag-and-drop functionality lets the user reorder the ranked list. When an Editor removes a proposed Reviewer, the rank order automatically updates to reflect the change; a discard tool () replaces the former Remove action link.


New Proposed Reviewers interface

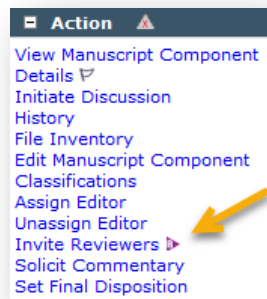


Name	Proposed By	Date Proposed	Notes	Invite	Alternate
  Karen W Settle (Reviewer) 	Mary Smith	Sep 25 2016 01:23PM		<input type="checkbox"/>	<input type="checkbox"/>
  Ed-any-manu-sub A Smith (Reviewer) 	Mary Smith	Sep 25 2016 01:23PM			Invited
  Mary Margaret Smith (Reviewer) 	Mary Smith	Sep 25 2016 01:23PM		<input type="checkbox"/>	<input type="checkbox"/>

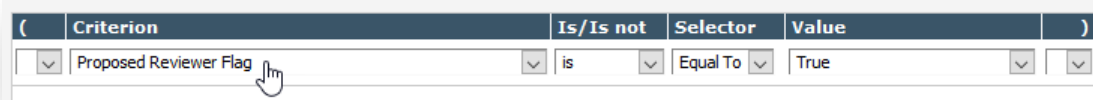
These reviewers have been chosen as potential reviewers by your colleagues. ([more...](#))

New Proposed Reviewer Flag






The new Proposed Reviewer flag alerts assigning Editors to submissions for which Reviewers have been proposed. Enabled when the proposing Editor selects/checks the "Display Proposed Reviewer Flag" box on the Reviewer Selection Summary page, the icon () displays next to the Invite Reviewers link for the related submission (and remains visible for as long as there is at least one proposed Reviewer in the list).



Editors can also search for submissions using the new Proposed Reviewer Flag criterion, making it easier to find submissions with Proposed Reviewers.



New Reviewer Selection Summary Page Tools

The grip tool () for changing the rank of Reviewers and the discard tool () are also introduced to the Reviewer Selection Summary page. Similarly, a promote tool () replaces the Promote link. Graphic tools to link () and un-link () Reviewer and Alternate Reviewer replace the former text links. Hover text identifies the icons. Display of these tools depends on the Editor Role's permission to perform the related functions.

Detail of Reviewer Selection Summary page



TO CONFIGURE:

No configuration is necessary.

Reviewer Discovery Proxy Registration Restrictions

In previous versions of EM, sites that utilized the ProQuest Reviewer Discovery tool to locate qualified Reviewers could bypass the duplicate email policy set by the publication. This would occasionally result in a Reviewer being registered in EM via the ProQuest tool, even though the individual already had an account in the EM site. This creates confusion, as it allows multiple people records to share the same email address in EM, while potentially creating duplicate user accounts.

New in EM 14.0, an enhancement adds an option to the existing Set Duplicate E-mail Policy page in PolicyManager. This Prevent Duplicate E-mail Addresses for Reviewer Discovery option prevents Editors from registering a new user via the ProQuest tool, if the user being registered already has an account within the EM site.

When this new option is selected/enabled, Editors will no longer be allowed to select the Reviewer Discovery candidate (which proxy-registers the person with an email address that already exists in the system) if there is a matching email address in EM. They will be asked to select the existing EM-registered user instead.

Detail of Reviewer Discovery page showing E-mail Match Found message with instructions

Select As				Reviewer	Board	Classifications
Inv.	Asn.	Alt.	Prop.	Name	Member	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-mail Match Found in EM: <input type="checkbox"/> Use this Candidate Rhonda Reviewer (Reviewer) College of Arts and Sciences Sample University rreviewer@sample.edu	No	1 Personal Class found 20.11000: Spine
				Information from Reviewer Discovery: E-mail match found; please select person above Rhonda Reviewer Women and Gender Studies Dept College of Arts and Sciences Sample University rreviewer@sample.edu	No	2 Reviewer Discovery Keyword (s) Found Gender Studies Women's Studies

This Reviewer Discovery candidate has an e-mail address that matches an existing EM user account. Please select the checkbox for the E-mail Match Found in EM to invite this candidate.

TO CONFIGURE:

On the Policy Manager Main Menu, click the link to the Set Duplicate E-mail Address Policy page in the Registration and Login Policies section. Select the Yes option under Prevent Duplicate E-mail Addresses for Reviewer Discovery.

Prevent Duplicate E-mail Addresses for Reviewer Discovery

When a Reviewer Discovery candidate is returned from the Pivot ProQuest Community of Scholars database, the system checks to see if the ProQuest e-mail address already exists in the EM database. If a matching e-mail address is found in EM, both the ProQuest record and the EM record are displayed for the Editor, and s/he can choose which person to use. If the Editor selects the ProQuest record, the person is proxy-registered in EM and a people record with a duplicate email address is created. This setting allows you to determine whether Editors are allowed to select and use a Reviewer Discovery candidate that may already exist in EM, thereby creating a duplicate account with the same e-mail address. .

Select "Yes" to prevent the Editor from selecting and proxy-registering a person that may already exist in EM on the Reviewer Discovery Results page.

☒ Yes ☐ No

Proxy Registration Interface Enhancements

In EM 13.1, Editors with permission could proxy-register a user and proxy in as that user immediately following the proxy-registration via Role links on the Proxy Registration Confirmation page. This made it easy for Editors to perform actions on behalf of an Author or Reviewer right away (rather than having to register the user, click the link to the Search People page and proxy into the account from there).

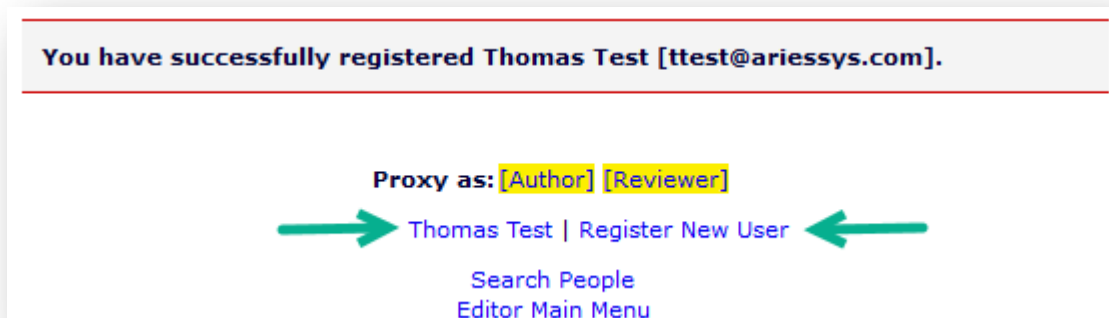
New in EM 14.0, the existing Proxy Registration Confirmation page is enhanced further to include additional links. These links are available if proxy registration is performed from either the Editor Main Menu or the Search People page.

The new links are:

- **[Proxy Registered User Name]**
 - Appears only if the logged-in Editor has the Search People permission. It mimics the user name link displayed on the Search People – Search Results page
 - Links to the Search People – Update Information page for the proxy registered user
- **Register New User**
 - Returns the logged-in Editor to the first proxy registration page

There are no changes to the existing Register and Invite New Author or the Register and Select New Reviewer workflows.

Detail of Proxy Registration Confirmation page with new links



TO CONFIGURE:

No configuration is necessary.

Increased Size of Editor Description Field

The Editor Description field allows publications to define a more specific stratification of Editor Roles without necessarily creating multiple roles with the exact same permissions. For example, one person can be designated as "Managing Editor – North America" and another "Managing Editor – Asia" (and so on). This field can also be used to differentiate between groups of submissions an Editor is responsible for, such as one or more Special Issues.

New in EM 14.0, the length of the Editor Description field is expanded from 100 to 256 characters to accommodate more comprehensive descriptions. The Editor Description field is maintained on the Search People – Update Information page, and the description is displayed on multiple pages and reports throughout the system.

Search People – Update Information page with Editor Description box highlighted

Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

mary mary ✓

Self-Registered:
Feb 13, 2003

Last Modified:
Jan 30, 2017

[Inactivate this User](#)

☐ Exclude this user from receiving all batch and reminder emails:
☒ Always

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Default Login Menu:

Available as a Reviewer? Yes ☐ No ☒

Board Member? Yes ☐ No ☒

Forbidden as a Reviewer? Yes ☐ No ☒

Reviewer Role *

Publisher Role *

Editorial Role *

Editor Description

[Activity Details](#)

TO CONFIGURE:

No configuration is necessary.

Global Identifier for Transferred Submissions

In previous versions of Editorial Manager, submissions transferred from one site to another (EM and non-EM publications) would generate a new source ID number each time the submission was transferred.

For example, a submission transferred multiple times would look similar to this:

Journal A		Transfer→	Journal B		Transfer→	Journal C	
Source ID	MS ID		Source ID	MS ID		Source ID	MS ID
	213		213	76		76	247

This makes it difficult to track the same submission across all publications following a chain of such transfers. Publishers want to know precisely how submissions are transferred across both EM and non-EM publications.

New in EM 14.0, a new Global MS ID database field has been created to capture the unique ID of the submission. This value can then travel with the submission from transfer to transfer, including EM-to-EM transfers, and EM-to-non-EM transfers.

Once created, the Global MS ID field will be transferred intact via all subsequent MS transfers. For example:

Journal A			Transfer→	Journal B			Transfer→	Journal C		
Source ID	Global MS ID	MS ID		Source ID	Global MS ID	MS ID		Source ID	Global MS ID	MS ID
	EM_JA_213	213		213	EM_JA_213	76		76	EM_JA_213	247

When generated by EM, the basic format for the value will be “EM” + separator (underscore) + [Journal Acronym] + separator (underscore) + [Unique Document ID], e.g. EM_MYSITE_21. (Editors with permission may also choose to manually enter this value.)

- For any outbound transfer *from* an EM site, EM will generate a Global MS ID if the submission does not yet have one at the point of transfer from the source site.
- For EM-to-EM transfers, any Global MS ID will be transferred from the source site to the target site.
- For outbound EM-to-non-EM transfers, the new Global MS ID will be written into a new attribute in the XML created for the outward FTP transfer.

- For incoming submissions in the Transferred Submissions folder, a unique ID will be included in the import if present and applicable to the import mechanism, otherwise the Global MS ID will be left blank.
 - In this release, the JATS-format Manuscript Import for transferred submissions, and the variant used for MSP imports, will both support the Global MS ID via a new XML attribute.

Note: As this is a new EM 14.0 database field, existing/historical submissions will not receive a Global MS ID on upgrade to EM 14.0.

Transfers from EM to another publication are enhanced to include the Global MS ID value in the metadata transferred. The value is stored in the DOCUMENT table in the database. The system will automatically generate a value if one is not present when the submission is transferred out.

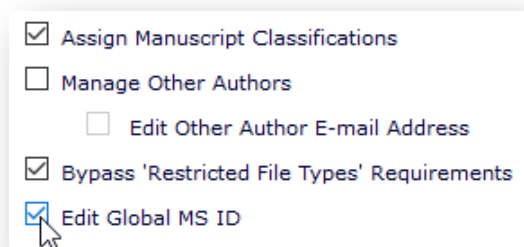
Note: For submissions that are initially transferred into EM via third-party sources, the Global MS ID will only be created on the receiving EM site if the value is present in the import as a separate XML element (see below).

```
<DOCUMENT>
  <REVISION>0</REVISION>
  <DTITLE>Test Title for February 10, 2016</DTITLE>
  <SHORT_TITLE />
  <ARTICLE_TYPE>APC Optional</ARTICLE_TYPE>
  <MANUSCRIPT_NUMBER />
  <GLOBAL_MS_ID>EM_SALLYDEV140_1578</GLOBAL_MS_ID>
  <INITIAL_DATE_SUBMITTED>2015-10-16T14:02:55-
04:00</INITIAL_DATE_SUBMITTED>
  <REVISION_SUBMITTED_DATE>2015-10-16T14:02:55-
04:00</REVISION_SUBMITTED_DATE>
  <ABSTRACT_TEXT />
  <ALL_AUTHORS>Cindy Author</ALL_AUTHORS>
  <PRODUCTION_NOTES />
  <DOI />
</DOCUMENT>
```

TO CONFIGURE:

While no configuration is needed to enable this field (all publications will have it populated going forward), additional configuration is necessary to make it visible in the interface. A new RoleManager permission, Edit Global MS ID, controls which Editor Roles can edit the Global MS ID.

New Editor Permission in RoleManager

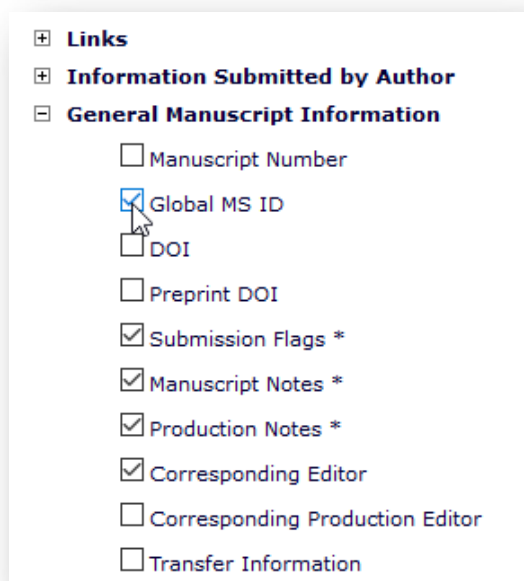


A screenshot of a web interface showing a list of permissions. The permissions are listed with checkboxes. The 'Edit Global MS ID' checkbox is checked and highlighted by a mouse cursor.

- ☒ Assign Manuscript Classifications
- ☐ Manage Other Authors
 - ☐ Edit Other Author E-mail Address
- ☒ Bypass 'Restricted File Types' Requirements
- ☒ Edit Global MS ID

A new Global MS ID Layout Item is added to the Custom Details Layout, which can be added to existing Details page layouts via the Add/Edit Details Page Layout section in PolicyManager. From the Main Menu, click the Define Details Page Layouts link (under General Policies) and select the page layout to edit. On the Add/Edit Details Page Layout page, find and click the link for the Select Items to Display page. On this page, in the General Manuscript Information section, check the box for Global MS ID.

New Details Page Option in PolicyManager



A screenshot of a web interface showing a list of options for the 'General Manuscript Information' section. The 'Global MS ID' checkbox is checked and highlighted by a mouse cursor.

- ☐ Manuscript Number
- ☒ Global MS ID
- ☐ DOI
- ☐ Preprint DOI
- ☒ Submission Flags *
- ☒ Manuscript Notes *
- ☒ Production Notes *
- ☒ Corresponding Editor
- ☐ Corresponding Production Editor
- ☐ Transfer Information

This element **will not** be added to any Default Editor page layouts (Editorial, Proposal, Production). Administrators will use a Custom Details Page layout include the field on Details pages. Editors with the above RoleManager permission will also see a link to edit the value.

In addition, Editors using the Create Submission interface in ProduXion Manager, and who have the above permission, will also be able to edit the Global MS ID initially generated by the system before saving.

Partial view of Details Page Layout with Global MS ID field included

Global MS ID:	EM_SAMDEV140_32 [Edit]
Manuscript Number:	SAMDEV140-D-17-00019
<div>Cancel Save</div>	

Passwords for New User Registrations and Password Recovery

In EM 14.0 several enhancements address how passwords are handled in creation (for both standard and proxy registration) and recovery. The behavior of existing password-related merge fields (%PASSWORD% and %BLINDED_PASSWORD%) is updated to reflect increased security measures. Deep links created by the merge fields drive the email recipient to a site page to create or change the password (depending on whether the user already has a password in the system). The actual password is never sent.

Standard New User Registration

In EM 14.0, new users will create their own password on the registration page. They will be required to enter the password identically twice. If the site has a Password Profile set (this can be created for the publication by Aries Account Coordinators), the password must abide by all profile rules. Additionally, if the site has security questions enabled, users will be required to select and answer a question to complete the registration.

Proxy Registration

In EM 14.0, new proxy-registered users must create their own passwords (and answer any security questions the site has enabled), as in the standard registration process. In order for this to be accomplished, the publication must send a letter to the new user containing %USERNAME% and %PASSWORD% merge fields. This is typically done automatically via the notification of registration letter associated with the Proxy Register New User event in ActionManager, or by an invitation/assignment letter for Reviewer or Author, or if the individual is proxy registered as part of an invitation/assignment as a Reviewer or Author.

In Rich Text (HTML) emails, the %PASSWORD% merge field now renders as a deep link for new user registration emails: [click here to create your password and login](#). In plain text emails, the merge field renders as a clickable URL.

Both the link and the URL direct the user to the Create Password page to complete the registration.

Detail of registration notification email showing deep links

Here is your username and confidential password, which you need to access the Editorial Manager at <http://testweb.editorialmanager.com/samdev140/>.

Username: RockyReviewer

Password: [click here to create your password and login](#)

Please save this information in a safe place.

Password Recovery

Users who forget their password can request their login information by clicking the Send Login Details link on the Login page. This links to the Account Finder page where the user enters the email address associated with the account and clicks the Send Login Details button. (If the email address is not uniquely associated with one account, the user is required to enter First and Last Name.)

Once identified by the site, the user receives an email that includes the %PASSWORD% merge field (similar to the email shown above) that links to the Change Password page. A user must create a new password during this process, as the password recovery tool triggers a password reset for security reasons.

TO CONFIGURE:

No configuration is necessary. However, publications should verify that existing and new letters for proxy-registered users include the %USERNAME% and %PASSWORD% merge fields where appropriate. This ensures that new users can create a password and complete the registration process.

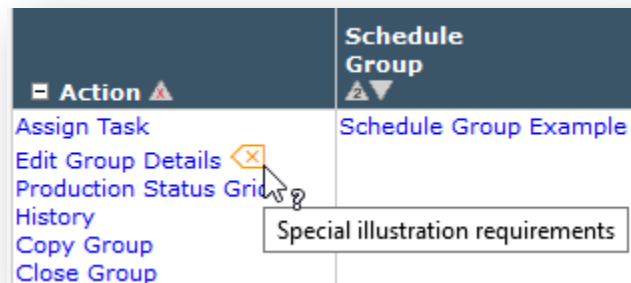
Production Tracking Enhancements

Additional Details Fields and Flags for Schedule Groups

EM/PM Versions 13.0 and 13.1 added functionality to support a books processing workflow, including the creation of Schedule Group Families, which allow for the capture of book-level metadata as part of the Schedule Group record.

This EM/PM 14.0 enhancement introduces the ability to create custom fields for use at the book (Schedule Group) level, enabling publications to add new fields as needed. These Additional Schedule Group Detail (ASGD) fields are modelled on the existing Additional Manuscript Detail (AMD) fields, including Custom Metadata ID configurations and associations with flags via new Schedule Group Flags.

Example of Schedule Group flag



ASGD fields can be configured to be available for all Schedule Group Families or just specific ones. Once ASGD fields have been created, they can be viewed on the Edit Schedule Group Details page, where Editors have the ability to enter values, as well as on the read-only Schedule Group Details page.

Detail of Edit Schedule Group Details page showing new ASGD field

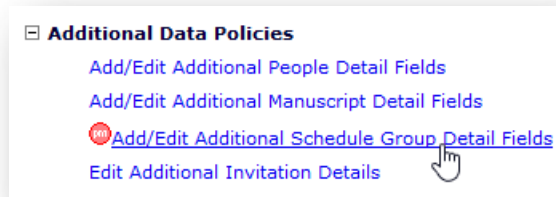
Estimated Printed pp:	<input type="text"/>
Previous Edition pp:	<input type="text"/>
<input type="checkbox"/> Additional Schedule Group Details	
Special illustration requirements	<input checked="" type="checkbox"/> Display 'Special illustration requirements' flag

ASGD fields and their values are available for reporting via General Data Export (GDE) and Enterprise Analytics Reporting (EAR).

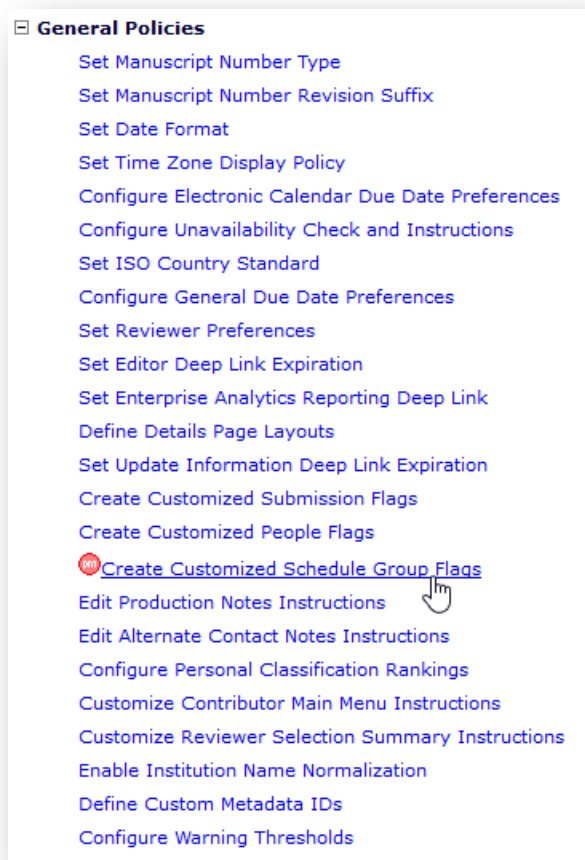
TO CONFIGURE:

The ability to create ASGD fields and Schedule Group Flags will be available to all administrators at upgrade without additional configuration.

To create ASGD fields, go to the Additional Data Policies section on the PolicyManager Main Menu and select the link to the Add/Edit Additional Schedule Group Detail Fields page. Enter the information for the new detail field.



To create a flag, go to the General Policies section on the PolicyManager Main Menu and select the link to the Create Customized Schedule Group Flags page. Flags can be associated with ASGD fields.




Partial view of Create Customized Schedule Group Flags page

Create Customized Schedule Group Flags

Schedule Group Flags can be selected to display for a Schedule Group on the Edit Group Details page if a Schedule Group Flag has been associated with an 'Additional Schedule Group Detail' (ASGD) field. If a flag is associated with a specific ASGD field, the option to display or remove the flag displays next to the associated ASGD field. When a flag is displayed for a Schedule Group, it is visible within the Manage Schedule Groups folder where the 'Edit Group Details' action link is displayed. Only Editors and Publishers with appropriate RoleManager permissions will be able to view, turn on, or turn off Schedule Group Flags.

Add

Order	Flag	Flag Name	Associated With ASGD	
<input type="text" value="1"/>		Special illustration requirements	Special illustration requirements	Remove Edit

Editor and Publisher Roles require new permissions to view, turn on, or turn Off Schedule Group Flags. A system administrator can configure these permissions in RoleManager on the Edit Role Definition page (for each role). The new permissions appear in the Flag Icons section. Check the box next to the appropriate permission.

Flag Icons

☒

View Submission Flags

☒

Turn On Submission Flags

☒

Turn Off Submission Flags

☒

View Submission Flag History

☒

View People Flags

☒

Turn On People Flags

☒

Turn Off People Flags

☒

pm

View Schedule Group Flags

☐

pm

Turn On Schedule Group Flags

☐

pm

Turn Off Schedule Group Flags

BITS Production Task Export for Books

EM/PM 13.0 introduced the capability for books processing workflows and added book-related metadata fields. This enhancement enables the transmission of book-related metadata, via a Submission Production Task Export or a Schedule Group Production Task Export, using the Book Interchange Tag Suite (BITS) 2.0 DTD, and introduces additional metadata fields.

The new BITS 2.0 Production Task Export transmittal method for a Submission Production Task transmits an XML file in BITS format containing information about:

- the Book (Schedule Group),
- the unit (if the unit is part of the same Schedule Group as the triggering submission),
- and the single chapter (submission) for which the task is being assigned.

A chapter must be assigned to a Book Schedule Group before the Submission Production Task is assigned, in order for book-related metadata to be included.

The new BITS 2.0 Production Task Export transmittal method for a Schedule Group Production Task transmits an XML file in BITS format containing information about:

- the Book (Schedule Group),
- all units included in the Schedule Group Table of Contents (TOC),
- and all chapters included in the Schedule Group (submissions for which production has been initiated).

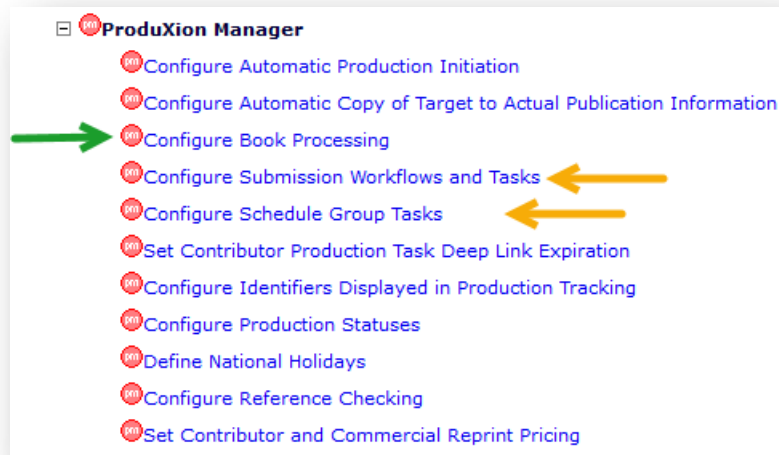
The individual elements are written to the XML file based on their order in the Schedule Group TOC. Chapters in the Pre-Selected Submissions grid are not written out in the XML file because production on them has not been initiated.

This enhancement also introduces seven additional metadata fields, displayed on the Add Schedule Group page (for the Book Schedule Group family). The fields are:

- Subtitle
- Alt-title
- Schedule Group DOI
- Book ID
- Copyright Statement
- Copyright Year
- Copyright Holder

TO CONFIGURE:

From the ProduXion Manager section of the PolicyManager main menu, first ensure that book processing is enabled.



To enable the new transmittal method for a Submission Production Task, go to the Configure Submission Workflows and Tasks page to edit All Submission Tasks. Selecting the Edit link opens the Configure Submission Workflow page. Choose a Task Type to edit (or create a new task as needed).

On the Edit Submission Task page, find the FTP Options section. In the dropdown menu next to Submission Task Transmittal Method, select "BITS 2.0 Production Task Export".

Configuring the Schedule Group Tasks is similar. On the Configure Schedule Group Tasks page, select a task to edit (or add), find the FTP Options section on the Edit/Add Schedule Group Task, and select "BITS 2.0 Production Task Export" for the Group Task Transmittal Method.

Detail of Add/Edit Submission Task page

A screenshot of the 'FTP Options' section in a web application. The section has a title 'FTP Options' in blue. Below it is a label 'Submission Task Transmittal Method:' followed by a dropdown menu showing 'BITS 2.0 Production Task Export'. Below the dropdown are four checkboxes: 'Allow task assignment and FTP without Assignment Files', 'Include Aries Import XML file in transmittal', 'FTP task without go.xml file', and 'Use Manuscript Number for file names'. At the bottom, there is a label 'FTP Server address (e.g. ftp.ariessys.com):' followed by a text input field.

Merge Field Enhancements

New Editor Assignment Summary Merge Fields

EM 14.0 introduces two merge fields just for Automated Editor Summary Reminders (AESRs).

`%EDITOR_REMINDER_FOLDER_SUMMARY%` pulls from up to 11 selected assignment-related Editor folders and inserts a list summarizing the state of the selected folders to help an Editor determine which folders/submissions need attention. This field populates only in AESR emails.

`%EDITOR_REMINDER_SUBMISSION_LISTS%` inserts lists of submissions from up to 11 selected assignment-related Editor folders into a reminder email, to help an Editor see which folders/submissions need attention. This field populates only in AESR emails.

Similarly, two new merge fields summarize information from all 11 assignment-related Editor folders (excluding the New Invitations folder if the recipient Editor does not have the Editor RoleManager "Receive Invitations for Assignments" permission) for non-AESR use. `%EDITOR_ASSIGNMENT_FOLDER_SUMMARY%` and `%EDITOR_ASSIGNMENT_SUBMISSION_LISTS%` can be used in any letter to an Editor whose Editor Role has the "Receive Assignments" permission.

Editor Decision Phrases for Notify Author Letter

`%EDITOR_DECISION_PHRASES%` is introduced in EM 14.0 to be used in the Notify Author letter. Publications create the pool of Editor Decision Phrases and configure Editor Forms to use selected Editor Decision Phrases (based on the Role/Article Type configuration). When Editors access the Editor's Decision and Comments page, they can select Editor Decision Phrases to include in the letter, as long as the merge field is included in the Decision Letter template.

Global Manuscript Identifier

The new `%GLOBAL_MS_ID%` merge field populates in all mail-merge letters that are related to a transferred submission. The identifier is retained when the original submission is transferred across publications.

Password-Related Merge Field Updates

The behavior of existing password-related merge fields, `%PASSWORD%` and `%BLINDED_PASSWORD%`, is updated in EM 14.0 to reflect increased security measures. The fields behave similarly, inserting one of two deep links, depending on whether or not the recipient has a saved password in the system. The links drive the user to site pages to create or change the password. The actual password is never sent.