



Editorial Manager/ProduXion Manager
Version 15.1 BETA Release Notification

 **Editorial Manager®**

 **ProduXion Manager®**

 **Commerce Manager™**

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General Enhancements

Identity Confidence Check

Academic fraud may take the form of fake submissions and/or fake reviews on those submissions as well as falsified images and data. In order for publications to guard against academic fraud Editors must research contributors and reviewers and/or rely on their personal knowledge of a subject area to judge whether these individuals are *bona fide* and whether or not they can be trusted.

EM version 15.1 introduces the Identity Confidence Check (ICC) feature to help publications by rating the confidence in the personal details supplied for a particular individual in EM. The check calculates an overall rating based on several factors, each of which represents a different class of personal metadata (related to the user record and the submission) that can be evaluated in the EM system.

When ICC is configured, an Editor (with RoleManager permission) will see an icon next to a person's name on key pages to provide ICC information early in the submission process. Icons indicate a general assessment of pass , alert , and high alert . An Editor may override, or effectively turn off, a warning indicator for a particular person (i.e., the metadata as checked by the ICC algorithm indicates that the person may not be trustworthy, but the Editor knows otherwise). Individuals marked as trusted by an Editor display this icon: . Individuals who have not been given an ICC rating are indicated by this icon: .

Detail of New Submissions folder, showing ICC icons

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted
View Submission Details ▾ History File Inventory Edit Submission Send Back to Author Remove Submission		Totally Free Article		Terrific Title	Gloria Glacier 	19 Sep 2018
View Submission Details ▾ History File Inventory Edit Submission Send Back to Author Remove Submission		Totally Free Article		Evolution	Michael Mountain 	19 Sep 2018
View Submission Details ▾ History File Inventory Edit Submission Send Back to Author Remove Submission		Totally Free Article		Catastrophe: The Trouble with Felines	Fran Forest 	19 Sep 2018

Once the feature is enabled, the ICC is automatically triggered for all Article Types when a new submission is received by a publication. It is automatically recalculated when a revision is received. ICC is also triggered with Co-Author verification and changes to Co-Author metadata.

Clicking the ICC icon next to a person's name opens a pop-up window, where an Editor may see the underlying detail used to determine the ICC rating. The window also allows the Editor to manually initiate the ICC (Check Now button) or recalculate an existing rating (Recalculate Now button). An Editor (with appropriate permission) also has the option to override the results of the check and mark the person as trusted (Override and Trust this Person button).

ICC pop-up window showing information used for rating



A person's overall rating is not intended to impede the submission's progress through the editorial workflow or bias the submission in any way. Rather, the goal is to provide an objective assessment of possible risk factors or indications that a person and/or work may be fraudulent, and to provide the necessary information for the publication staff to investigate further, if desired.

Note: The ICC is an asynchronous process and does not hold up the submission in any way.

TO CONFIGURE:

Go to **PolicyManager** > General Policies > Configure Identity Confidence Check. On the Configure Identity Confidence Check page, check the box next to the setting, Enable Identity Confidence Check. Then use the grid to configure the check.

For each factor (Email Domain, Institution, Country/Region, EM Activity, ORCID Activity):

1. Use the drop-down list to set the level of importance on a scale of 1 (lowest) to 5 (highest).

2. Use the checkboxes to select which users are subjected to the ICC: Corresponding Author, Co-Authors, Suggested Reviewers. To exclude a factor from the ICC, do not select any user roles next to it.
3. Click the Configure link for each factor as described below.

Configuration grid on Configure Identity Confidence Check page (PolicyManager)

Factor	Level of Importance 1 = lowest 5 = highest	Corresponding Author	Co-Authors	Suggested Reviewers **	
Email Domain	3	☐	☐	☐	Configure
Institution *	3	☐	☐	☐	Configure
Country or Region	3	☐	☐	☐	Configure
EM Activity	3	☐	☐	☐	Configure
ORCID Activity	3	☐	☐	☐	Configure

* Institution is excluded from the Identity Confidence Check if Institution Name Normalization is not enabled.

** Suggested Reviewers are excluded from the Identity Confidence Check if no Article Types are configured with the Suggest Reviewers submission step displayed.

Email Domain: Configure Email Domain Exceptions for ICC

Email domain extensions may be added to any of the three categories (Pass, Alert, High Alert). Enter the domain extension in the text field below the appropriate category and click Add. After a domain extension is added, it can be edited or removed by using the corresponding link.

Pass

.ac.

Remove Edit

*.edu

Remove Edit

*.gov

Remove Edit

*.mil

Remove Edit

*.org

Add

Institution: Configure Institution Assessment Option for ICC

Institution Name Normalization must be enabled for this factor to be included in ICC (**PolicyManager** > General Policies > Institution Name Normalization). This setting checks the institution name provided by the individual. If the institution is not associated with a Ringgold ID, the assessment toward the overall ICC score may be set as Alert or High Alert.

☒ Alert
 ☐ High Alert

Country/Region: Configure Country/Region Exceptions for ICC

To move a country/region from one list to another highlight the name and click the appropriate button: Move to Pass, Move to Alert, or Move to High Alert. To highlight more than one item, hold the CTRL key (Command key on a Mac) while selecting with the cursor. By default, all countries/regions are included in the Pass list. In order for this factor to be included in ICC, at least one country/region must be in the Alert or High Alert column.

Pass Select All / Clear All	Alert Select All / Clear All	High Alert Select All / Clear All
UNITED STATES (us)		
AFGHANISTAN (af)		
ALBANIA (al)		
ALGERIA (dz)		
AMERICAN SAMOA (as)		
ANDORRA (ad)		
ANGOLA (ao)		
ANGUILLA (ai)		
ANTARCTICA (aq)		
ANTIGUA AND BARBUDA (ag)		
ARGENTINA (ar)		
ARMENIA (am)		
ARUBA (aw)		
AUSTRALIA (au)		
AUSTRIA (at)		
AZERBAIJAN (az)		
BAHAMAS (bs)		
BAHRAIN (bh)		
BANGLADESH (bd)		
BARBADOS (bb)		
BELARUS (by)		
BELGIUM (be)		
BELIZE (bz)		
BENIN (bj)		
BERMUDA (bm)		
BHUTAN (bt)		
BOLIVIA (bo)		
BOSNIA AND HERZEGOVINA (ba)		
BOTSWANA (bw)		
BOUVET ISLAND (bv)		
BRAZIL (br)		

Move to Pass Move to Alert Move to High Alert

EM Activity: Configure EM Activity Exceptions for ICC

Define level of various activities in EM. Check the box to automatically set a passing score for users with an Editor role or Editor assignment history.

Set the threshold for the number of authored accepted submissions, invited papers, and completed reviews to be used in the overall calculation.

The following elements are examined when the Identity Confidence Check evaluates EM Activity. People with activity in these categories are viewed positively in the overall Identity Confidence Score.

☐ Always trust Editors - If a person has an Editor Role or Editor assignment history, s/he will automatically be assessed a 'Pass' overall score and no other factors will be assessed for this person.

1. Person currently has an Editor Role or historical Editor assignments on this publication
2. Person has authored or more accepted submissions on this publication
3. Person has submitted or more invited papers on this publication
4. Person has completed or more reviews on this publication

Cancel Submit

ORCID Activity: Configure EM Activity Exceptions for ICC

Individuals with an authenticated ORCID identifier are given a Pass score for this factor. If the individual does not have an authenticated ORCID identifier in EM, the assessment toward the overall ICC score may be set as Alert or High Alert.



A screenshot of a configuration dialog box. It contains two radio button options: "Alert" (which is selected) and "High Alert". Below these options are two buttons: "Cancel" and "Submit". A mouse cursor is pointing at the "High Alert" radio button.

Enhanced Unsubscribe Link in Email Footer

The purpose of the General Data Protection Regulation (GDPR), which took effect May 25, 2018, is to strengthen and unify data protection for individuals within the European Union (EU). It also addresses the export of personal data outside the EU. Among its requirements, the GDPR ensures the “right to erasure” for individuals. To accommodate this requirement EM version 15.0 introduced a standard text footer to system emails directing recipients to contact the publication office if they wanted to be removed from the publication’s database. Publication office staff had to monitor incoming mail and search for the user’s record in order to address these requests.

New in EM 15.1, these steps of the process are automated. The enhanced email footer includes a text link (or URL) to a landing page on the publication’s EM site, allowing the individual who is requesting removal to access and confirm the information to be anonymized. The system sends an Editor/editorial staff notification of the request with a link to the corresponding user record.

In HTML letters, the footer reads:

In compliance with data protection regulations, you may request that we remove your personal registration details at any time. ([Remove my information/details](#)). Please contact the publication office if you have any questions.

In plain text letters, it reads:

In compliance with data protection regulations, you may request that we remove your personal registration details at any time. (Use the following URL: <https://testweb.editorialmanager.com/{ACRO}/login.asp?a=r>). Please contact the publication office if you have any questions.

A message on the login page verifies that the user intends to request removal of personal information. The user must log in to confirm identity.

Login page text verifies user’s removal request

The screenshot shows a web page titled "User Verification - Request Removal". On the left, there is a sidebar with the text: "This page is to request the removal of your personal registration information. Click the links below to view the privacy policies." followed by two links: "Aries Privacy Policy" and "Publisher's Data Use Privacy Policy". The main content area is titled "Please Enter the Following" and contains a login form with fields for "Username:" and "Password:". Below the fields are "Cancel" and "Proceed" buttons. Underneath the buttons, it says "Or Login via:" followed by an ORCID iD icon and the text "What is ORCID?". Below this are two links: "Send Login Details" and "Login Help". A red horizontal line separates this section from the bottom section, which contains the text: "Please enter your login information or use your ORCID iD for verification purposes." and "Select the Proceed button to continue with the Removal Request or select the Cancel button to exit."

After login, the user sees a Request Removal page, which displays user's name, email address, address (including institution and department), and ORCID identifier, if any. The page also includes a Comment field. When the user clicks the button, Please Remove My Details, a pop-up message displays, asking the user to confirm the action to continue. Clicking Proceed takes the user to a confirmation message that the request has been received.

Request Removal page allows user to confirm data to be anonymized. The user may also cancel the request.

Request Removal

This page is to request the removal of your personal registration information. Click the links below to view the privacy policies.

[Aries Privacy Policy](#)
[Publisher's Data Use Privacy Policy](#)

Request Removal

Thank you for confirming your identity. **You may proceed with your request to remove your personal registration details by clicking the 'Please Remove My Details' button.**

Dr. John Q. Sample 000-1234-5678-999X
jqsample@XYZCompany.com
Department of Campanology
University of Thistown
Thatplace, MA 01234
United States

Please enter any additional comments you wish to make to the publication staff:

Two new merge fields for use in a Request Removal Notification letter (to Editor role responsible for anonymizing user records) capture the information provided by the user requesting removal:

%REQUEST_REMOVAL_USER_DEEP_LINK% will take the Editor recipient directly to the requesting user's Search People – Update Information page. In Rich Text (HTML) letters the link displays as “User Requests Removal.” The link will work only for Editor roles with the RoleManager permission, Anonymize Users.

%REQUEST_REMOVAL_COMMENTS% will display any text entered by the requesting user in the Comments field on the Request Removal page.

Once a request has been confirmed in the system, the user's Search People – Update Information page includes a date-time stamp of the request in the left column. This information is visible to all Editors with Search People permission.

An Editor who receives the Request Removal Notification letter (and who has Anonymize Users permission) may click the deep link to access the requesting user's Search People – Update Information page to complete the removal process. An Anonymize this User button displays in the left column below the date-time stamp. The Retain Name setting allows publications the option to keep the Full Name when checked or to remove the Full Name when unchecked.

Search People – Update Information page displays a date-time stamp of the removal request (visible to all Editors with Search People permission) and an Anonymize this User button (visible to Editors with permission, Anonymize Users).

Note: Contact your Aries Account Coordinator regarding recommended practices for anonymizing personal metadata.

TO CONFIGURE:

First, configure a letter (in **PolicyManager** > Email and Letter Policies > Edit Letters) to notify appropriate Editor role(s) of a user request to remove personal information. The letter should include the merge fields %REQUEST_REMOVAL_COMMENTS% and %REQUEST_REMOVAL_USER_DEEP_LINK%.

If necessary, grant Editor role(s) permission to anonymize user records. Go to RoleManager and select the appropriate Editor Role. On the Edit Role Definition page, check the box next to the permission, Anonymize Users. **Important:** At least one Editor role must have this permission and at least one Editor must be assigned this Editor role.

Then, go to **PolicyManager** > Additional Data Policies > Privacy Policy Configuration.

In the Select Request Removal Notification Letter section, use the drop-down menu to select the letter configured above. Use selectable list to choose Editor role(s) to receive the letter. Only Editor roles with the permission, Anonymize Users, appear in this list.

Detail of Privacy Policies Configurations page: Select letter configured to notify Editor of a removal request and identify the Editor role to receive the letter

Select Request Removal Notification Letter

Select a letter from the drop-down menu to use as the notification to the Editor of a user requesting personal data be removed (anonymized). The drop-down displays all letters in the 'General' letter family. Select Editor Role(s) with the 'Anonymize Users' permission to receive the notification.

Choose a Letter:

Select Editor Role(s):

In the Edit Request Removal Page Instructions section, use the text boxes to enter any custom instructions to appear to individuals requesting personal data removal.

External Reviewer Database Integration

Publications face an ongoing challenge to find qualified Reviewers in a timely fashion. Often a publication's pool of Reviewers is overburdened, and Editors must spend time searching outside the EM system to find new Reviewer candidates. The Reviewer Discovery feature (from pivot ProQuest Community of Scholars) provides one method of identifying potential Reviewers.

EM version 15.1 introduces an additional method for finding qualified Reviewers by allowing Editors to send a request from EM to an External Reviewer Database (ERD). An ERD could be a third-party service provider, or an EM publication/publisher that wants to build its own recommendation service. EM supports both of these business models with a new API that sends a request from EM to a third-party provider/system. Candidates identified in the external database are automatically imported into EM and presented as Proposed Reviewers on the Reviewer Selection Summary page, making these external candidates available to the Editor for selection.

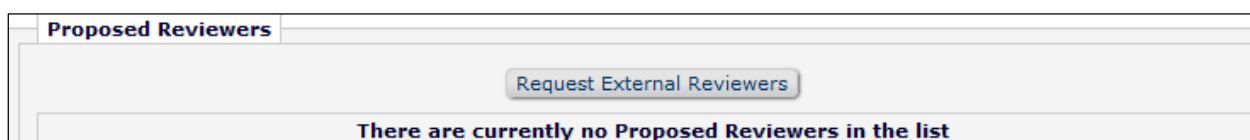
The system will automatically proxy register an external candidate who does not have an existing EM record. Candidates from the external database who can be unambiguously identified with an existing EM record (e.g., authenticated ORCID identifier, exact email match) are also included on the Proposed Reviewer list. Candidates who cannot be unambiguously identified are not included.

Note: This automatic proxy registration will not trigger a system notification. The publication will be expected to send the registered candidate a "New Assignment/Invitation" and/or "Welcome" letter after registration, i.e., when the Proposed Reviewer is selected.

When the feature is enabled, Editors (with permission) will see a Request External Reviewers button on the Reviewer Selection Summary page. Clicking the button opens the External Reviewer Request Form. Drop-down menus allow the Editor to select the number of candidates to request for each Reviewer type. A notes field appears next to each Reviewer type. The Editor may use this field to provide additional information that will help the ERD team provide appropriate candidates. Entering notes may be configured as optional or required.

These parameters along with pertinent submission information will be sent via API to the ERD target. Once the ERD team has identified potential Reviewers (in an asynchronous search), a list of candidates is returned to EM. The list includes names and key information of those individuals whose prior publications, expertise areas, etc. appear to relate to the subject matter of the submitted manuscript.

Detail of Reviewer Selection Summary page, showing Request External Reviewers button



The screenshot shows a web interface with a tab labeled "Proposed Reviewers". Below the tab is a button labeled "Request External Reviewers". At the bottom of the section, a message states: "There are currently no Proposed Reviewers in the list".

The EM system will send an email notification, if configured, to the appropriate Editor(s) when Reviewer candidate information has been received from the ERD. A new deep-linking merge field is available for use in this letter:

%REVIEWER_SELECTION_SUMMARY_DEEP_LINK% inserts a hyperlink that will take the Editor recipient directly to the Reviewer Selection Summary page for the submission.

Key Editor folders that display Review Status information will include a new column, External Reviewers Requested (next to the Review Status column). This new column displays information related to the status of the request.

Detail of Editor folder, showing new column, External Reviewers Requested

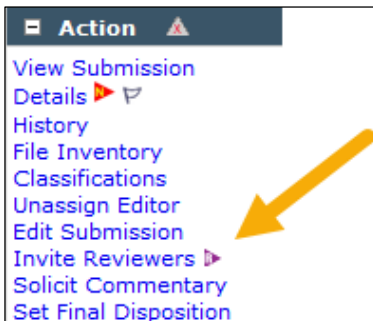
Review Status	External Reviewers Requested	Editor Decision
2 Agreed (more...)	Pending 1 Tech Reviewer Requested 2 days ago	

Additional details related to status messages are also available at the top of the Request External Reviewer Form.

Detail of External Reviewer Form, showing information related to requests

External Reviewer Request History			
Date Request Sent	Current Status	Request Details	Operator
11/13/2017	Pending	3 Regular Reviewers - I want 3 Reviewers with expertise in cardiomyopathy and at least one needs to be a cardiac surgeon. 2 Stat Reviewers	
10/20/2017	Complete	1 Tech Reviewer	

Once candidates have been identified and imported from the ERD, the Proposed Reviewers flag automatically displays for the submission next to the Invite Reviewers link.



TO CONFIGURE:

The publication must establish a relationship directly with the service provider (the ERD), and the EM feature must be enabled by your Aries Account Coordinator. Aries and the ERD must exchange API endpoints to enable communication between the two systems.

To allow Editors to use the feature, grant the new **RoleManager** permission. Go to the Edit Role Definition page for the appropriate Editor role and, in the Reviewer Invitations section, check the box next to the permission, Request External Reviewers.

Then go to **PolicyManager** > General Policies > Set Reviewer Preferences. Make configurations for this feature on the Externally Proposed Reviewers section of the page:

1. In the text box, enter instructions to display to Editors on the External Reviewer Request Form.
2. Configure Reviewer roles that may be included in requests:
 - a. Check the Select box next to the Reviewer role(s) that may be requested.
 - b. Enter the maximum number of potential Reviewers to be returned for each selected role.
 - c. Check the Notes Required box to require that requesting Editors enter text in the Notes field on the External Reviewer Request Form.
3. Enter email address(es) to receive success/failure notifications related to transfer of information to/from the ERD. (Notifications may be sent to registered EM users and to recipients at the ERD, who may not necessarily be EM users.)

Create a letter (**PolicyManager** > Email and Letter Policies > Edit Letters) to notify Editor(s) when a response comes from the ERD. Associate the letter with the ActionManager event, Proposed Reviewers Received from External Database. This letter is sent to the submission's Special Relationship Editor and Handling Editor. The new deep link %REVIEWER_SELECTION_SUMMARY_DEEP_LINK% is available for use in this letter.

Production Tracking Enhancements

Task Manager

In previous versions of EM/PM, publication staff could use ProduXion Manager (PM) to initiate production on a submission, enabling them to assign production tasks to appropriate users. These tasks could be managed and accessed via the Production Tasks menu. Production tasks (such as copyediting, pagination, or other production-related activities that typically occur after peer review) could only be performed once production was initiated on a submission.

Publications are increasingly using Production Task functionality to perform actions on submissions that are still in the EM editorial process and have not received a final disposition. In some cases, tasks performed prior to acceptance and tasks performed in the production process are performed by two different teams within the publication office. This may cause confusion when pre-acceptance and post-acceptance submissions are combined together in folders on the Production Tasks menu, because they cannot be easily differentiated. In addition, the “production” terminology can be confusing for users working on submissions that are still in an editorial workflow and not actually ready for production.

New in version 15.1, the Task Manager feature enables publications to assign editorial tasks before production is initiated on a submission. (**Note:** Existing PM functionality will still be used to assign production tasks after the submission moves to production.)

Publications can use Task Manager features in combination with existing PM permissions to configure different roles for staff responsible for editorial tasks and staff responsible for production tasks. These configurations will provide staff access only to relevant submissions and production-related or Task Manager–related actions.

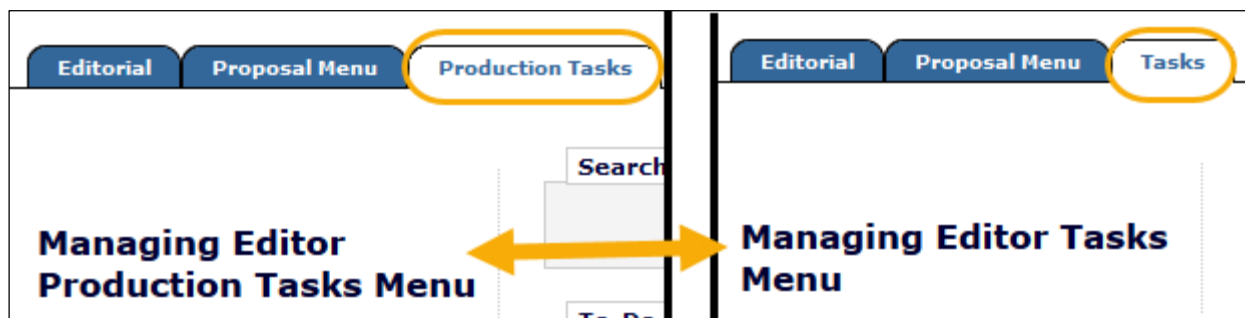
For example, a publication might configure the following roles:

- **Production Staff:** This role would have access to view all submissions in production but would not see submissions in Task Manager. Tasks intended for use in post-acceptance production would be accessible to users with this role as the assignor and assignee as needed.
- **Editorial Task Staff:** This role would have access to view all submissions in Task Manager but would not see submissions in production. Any tasks intended for use in Task Manager would be accessible to users with this role as the assignor or assignee as needed.
- **Administrator:** This role would have access to view all submissions in both Task Manager and Production. Users with this role would be able to manually assign tasks in Task Manager and initiate production on submissions as well as assign production tasks as needed.

Two new RoleManager permissions enable users to work with Task Manager:

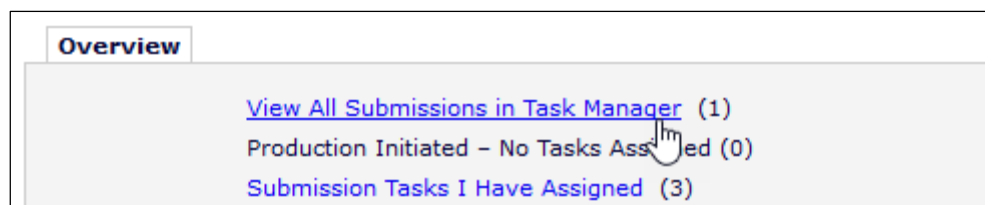
- **Assign Editorial Tasks in Task Manager:** Allows Editor users with this role to access the new “Assign Editorial Task” action link. The link is available if a submission’s Article Type has a Task Manager workflow selected and if Production has not been initiated. This permission is available only to Editor roles.
- **Use ‘Task Manager’ Labels:** Updates select text in the system to reference Task Manager terminology instead of Production-related terminology. This permission is available for both Editor and Publisher Roles. (This permission is intended for users who will only be responsible for editorial tasks and not tasks assigned in production.)

RoleManager permission, Use ‘Task Manager’ Labels, displays system text in the user interface appropriate for Editor and Publisher roles working with editorial tasks rather than Production Tracking terminology



A new folder, View All Submissions in Task Manager, will appear in the Overview section of the Task menu.

New folder available on Tasks menu: View All Submissions in Task Manager



A new system field, Task Manager Status, will be used to identify submissions for which editorial tasks have been assigned using Task Manager. A submission will have the status, In Task Manager, until one of the following events takes place:

- A user manually closes Task Manager for the submission by clicking the new action link, End Task Manager.
- The final task in the Article Type's Task Manager workflow is completed, **and** the task is configured with the setting, End Production/Task Manager Automatically after this task is Completed.
- A user clicks the action link, Initiate Production, **and** Task Manager is configured to end automatically when production is initiated, if no open tasks remain. (This configuration is optional.)
- A user sets Final Disposition, **and** Task Manager is configured to end automatically when final disposition is set, if no open tasks remain. (This configuration is optional.)

Detail of View All Submissions in Task Manager folder

Action	Manuscript Number	Author Name	Article Title	Article Type	Initial Date Submitted	Date Task Manager Initiated	Production Status
View Submission Assign Editorial Task ← Initiate Production Task Manager Details ← History File Inventory Edit Submission Send E-mail Linked Submissions	SAMDEV151-D-18-00029	Ralph Reviewer KF (UNITED STATES)	Top Secret Full Title	Totally Free Article	07 Sep 2018	13 Sep 2018 ↑	NA

The View All Submissions in Task Manager folder shows the date that the Task Manager workflow was initiated for a submission and the first editorial task was assigned.

The new action link, Assign Editorial Task, appears when the user has the corresponding RoleManager permission and the submission's Article Type is configured with a Task Manager workflow. This link appears in multiple folders on both the Editorial and Tasks menus.

The Task Manager Details page link opens the version of the Production Details page configured to display for the user's role. This page is available after Task Manager has been initiated (i.e., after the first editorial task has been assigned). The link appears in applicable folders on the Tasks menu.

Tasks that are configured in a Task Manager workflow may be assigned only before Production is initiated on a submission. Users who have been assigned Task Manager tasks that are still open when Production has been initiated may complete them.

TO CONFIGURE:

Task Manager is available only to publications that have ProduXion Manager enabled. Contact your Aries Account Coordinator to enable ProduXion Manager.

Grant permissions to appropriate roles in **RoleManager**. As described above, two new permissions enable users with Editor and Publisher roles to work with Task Manager:

- Assign Editorial Tasks in Task Manager
- Use 'Task Manager' Labels:

Define policies in **PolicyManager** > ProduXion Manager > Configure Task Manager Policies. This page allows a publication to define if and when Task Manager should end automatically. Task Manager may be set to end automatically when production is initiated (if no tasks are open), or when a Final Disposition is set (if no tasks are open). If both options are selected, Task Manager will end at whichever option is triggered first. If neither option is selected, Task Manager must be ended manually.

Detail of the Configure Task Manager Policies page

Configure Task Manager Policies

Users with the "Assign Editorial Tasks in Task Manager" RoleManager permission will be able to assign Tasks on submissions before Production is initiated. Submissions on which Editorial Tasks have been assigned will remain in Task Manager until Task Manager is manually ended, or one of the events selected on this page takes place.

☐ Automatically end Task Manager when Production is initiated (if no tasks are open)

☐ Automatically end Task Manager when Final Disposition is set (if no tasks are open)

Task Manager requires the creation of tasks and specific workflows. These steps are the same as for configuring Production tasks and workflows. Go to **PolicyManager** > ProduXion Manager > Configure Submission Workflows and Production Tasks. (**Note:** The option to add a new task only displays when editing All Submissions Production Tasks. This option will not appear when editing a custom workflow.) The Add/Edit Submission Production Task page includes settings related to Task Manager.

Detail of the Add/Edit Submission Production Task page

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

☐ Assign Automatically when Production is initiated (if this is the first task in the workflow)

☐ Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)

Automatically End Production or Task Manager when the Task is Completed and there are No Other Open Tasks in the Workflow.

 ☒ End Production/Task Manager Automatically after this task is Completed

The final task in a Task Manager workflow may be configured to end Task Manager automatically once the task is completed (green arrow, above). Automatic assignment functionality with trigger tasks is the same as with Production tasks.

Once tasks are created, they must be assigned to a workflow in **PolicyManager** > ProduXion Manager > Configure Submission Workflows and Production Tasks page. Enter a name for the Task Manager workflow and add the applicable tasks.

After a workflow is created, it must be assigned to Article Type(s) via **PolicyManager** > Submission Policies > Edit Article Types. A new Task Manager configuration is available on the Add/Edit Article Type page. Use the drop-down menu to select the Task Manager Workflow to be applied to the Article Type.

Detail of Add/Edit Article Type page, showing Task Manager settings in the Production Tracking Parameters section of the page.

Production Tracking Parameters:

Use Task Manager Workflow:  Task Manager Workflow

Use Submission Production Workflow: All Submission Production Tasks

Early Proof URL Feature Enhancement

EM version 15.0 introduced the Early Proof URL feature, which provided access via URL/URI to a publisher-generated version of the submission manuscript from within EM/PM. In the initial implementation, the URL/URI was imported into EM, but no other metadata was imported. Edits made to the submission's metadata were not aligned in the two systems.

New in EM 15.1., publications may export changes made to submission metadata in EM, to the third-party editing system. This allows for two-way editing between EM and the third party, as changes made in one place will now synchronize to the other. This synchronization occurs via a bi-directional API.

Six metadata fields are eligible for exchange via the API. The exchange occurs when submission metadata has been edited and saved in EM and a change has been made to one of these fields, or when a submission has been edited in the outside tool that results a change to one of these fields. The six relevant fields are: Article Title, Secondary Article Title, Abstract, Secondary Abstract, Keywords, Secondary Keywords. **Note:** If submission files have been changed during the edit session in EM, the API is not used. Instead, new files and metadata are expected to be sent to the third-party system via SFTP.

TO CONFIGURE:

Contact your Aries Account Coordinator.

Import and Transfer Enhancements

Incorporate JATS DTD and Import

The National Information Standards Organization (NISO) group responsible for the JATS DTDs has released a new DTD version (1.2). The new DTD version contains tagging for the CRediT initiative (Contributor Roles Taxonomy). For information on the CRediT initiative, see <https://casrai.org/credit/>.

Contributor Roles are already available to associate with the Corresponding Author and Co-authors within the EM interface and can be exported in JATS XML. Now, with the release of the JATS 1.2 Journal Archiving DTD 1.2, there is an official place in the DTD designed to hold these roles. EM/PM version 15.1 implements the JATS 1.2 Journal Archiving DTD (Version 1.2d1) for import and export.

The JATS 1.2 DTD import method is available for EM Ingest, “sister publication” manuscript import to EM, and “sister publication” manuscript import to PM. (A sister publication is one within the same publication organization that has been configured as part of an Inter-Journal Resource Sharing group). All three import/ingest methods will include the new ability to import/ingest Contributor Roles (multiple CRediT roles per Author and one “Other” role per Author).

Imported/ingested Contributor Roles will display in all places in the EM interface where they currently display when entered manually into EM. These locations include: PDF cover page, custom Details page, Author Details and View Author Details, and the transmittal form. Any changes to Contributor Roles between revisions can be ingested using EM Ingest and the JATS 1.2 DTD, and changes will be marked with the yellow warning triangles in the same way as when changes are made using the EM interface.

Publications will also have two new options for Submission Production Task transmittal. Both methods will include the contributor roles in the elements that are designated to hold them (per the JATS 1.2d1 DTD).

- JATS 1.2A Production Task Export
- JATS 1.2A V2 Production Task Export

TO CONFIGURE:

For Import/Ingest: Contact your Aries Account Coordinator.

For Production Task Export: “JATS 1.2A Production Task Export” and “JATS 1.2A V2 Production Task Export” are available on the Submission Production Task Transmittal Method drop-down menu on the Add/Edit Submission Production Task page in the FTP Options section (**PolicyManager** > ProduXion Manager > Configure Submission Workflows and Production Tasks).

Manuscript Exchange Common Approach (MECA) Initiative

Authors spend a great deal of time submitting and resubmitting their manuscripts to publications when attempting to get work published. Similarly, Reviewers at each publication spend time reviewing the manuscript. Both of these industry challenges could be addressed if journals and publishers had a way to transfer manuscripts seamlessly between publications using different submission and peer review tracking systems. A group of manuscript/management suppliers and publishers are collaborating to develop a common approach that can be widely adopted across the industry. For more information on the Manuscript Exchange Common Approach (MECA) project, see <https://www.manuscriptexchange.org/>.

EM version 15.1 introduces three new methods for information exchange in support of the MECA initiative:

- “MECA Manuscript Import” method can be used by related/sister publications.
- “MECA Manuscript Transfer” method can be used for EM-to-non-EM transfers.
- “MECA Manuscript Export,” a new Submission Production Task transmittal method, can be used to SFTP the MECA package to external vendors or preprint servers.

MECA import and export methods write submission metadata to a JATS-compliant XML, which is included as part of the .zip package that is exported/imported.

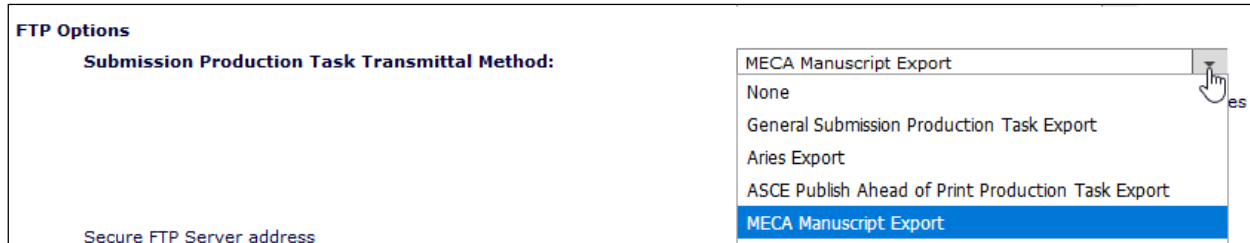
TO CONFIGURE:

For import: Contact your Aries Account Coordinator to enable MECA Manuscript Import.

For transfer: To enable MECA Manuscript Transfer (to non-EM publications) go to **AdminManager** > Configure Cross-Publication Submission Transfer. In the Configure Transfer Target Publications section:

1. Check the box for the setting, Enable cross-publication submission transfers to non-Editorial Manager publications.
2. Click the Add button to add a Non-Editorial Manager publication. This opens the pop-up window, Add Publication for FTP Transfer.
3. Complete the fields with target publication information. For Transfer Method, use the drop-down menu to select “MECA Manuscript Transfer.”

For export: “MECA Manuscript Export” is available on the Submission Production Task Transmittal Method drop-down menu on the Add/Edit Submission Production Task page in the FTP Options section (**PolicyManager** > ProduXion Manager > Configure Submission Workflows and Production Tasks).



FTP Options

Submission Production Task Transmittal Method:

- MECA Manuscript Export
- None
- General Submission Production Task Export
- Aries Export
- ASCE Publish Ahead of Print Production Task Export
- MECA Manuscript Export**

Secure FTP Server address

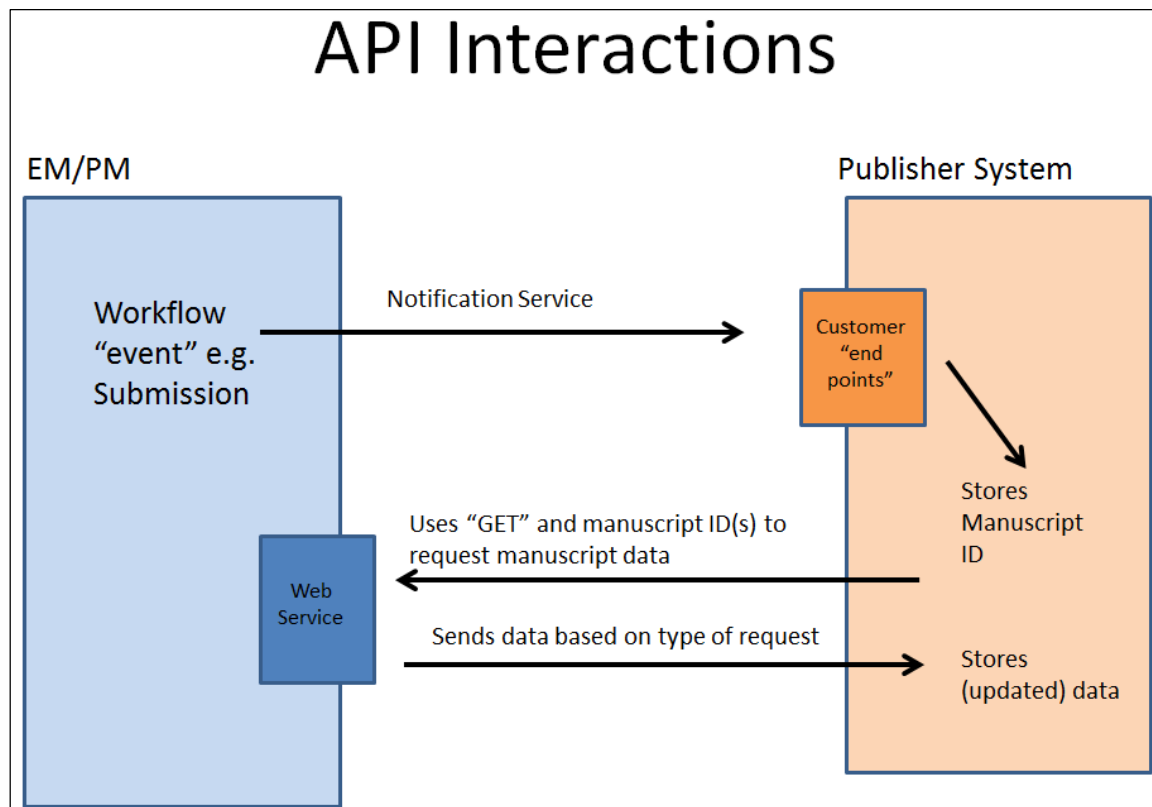
Web Services and Notification Services API

Editorial Manager Version 15.1 provides two new features for retrieving submission metadata from an EM site without logging directly into the system.

1. **EM Web Services** allow publications to use a RESTful API client to send an API call to the EM database and request submission metadata. Authentication credentials are used to verify the client's access to the site through Web Services.
2. **EM Notification Services** allow publications to configure their site to send notifications to predefined endpoints at specific workflow events. Notifications are sent as a query string containing select submission metadata elements.

A combination of web services and notification services allows publications to send a notification to an internal system when a specific workflow event occurs on a submission and automatically trigger a web service call to retrieve more detailed information about the submission.

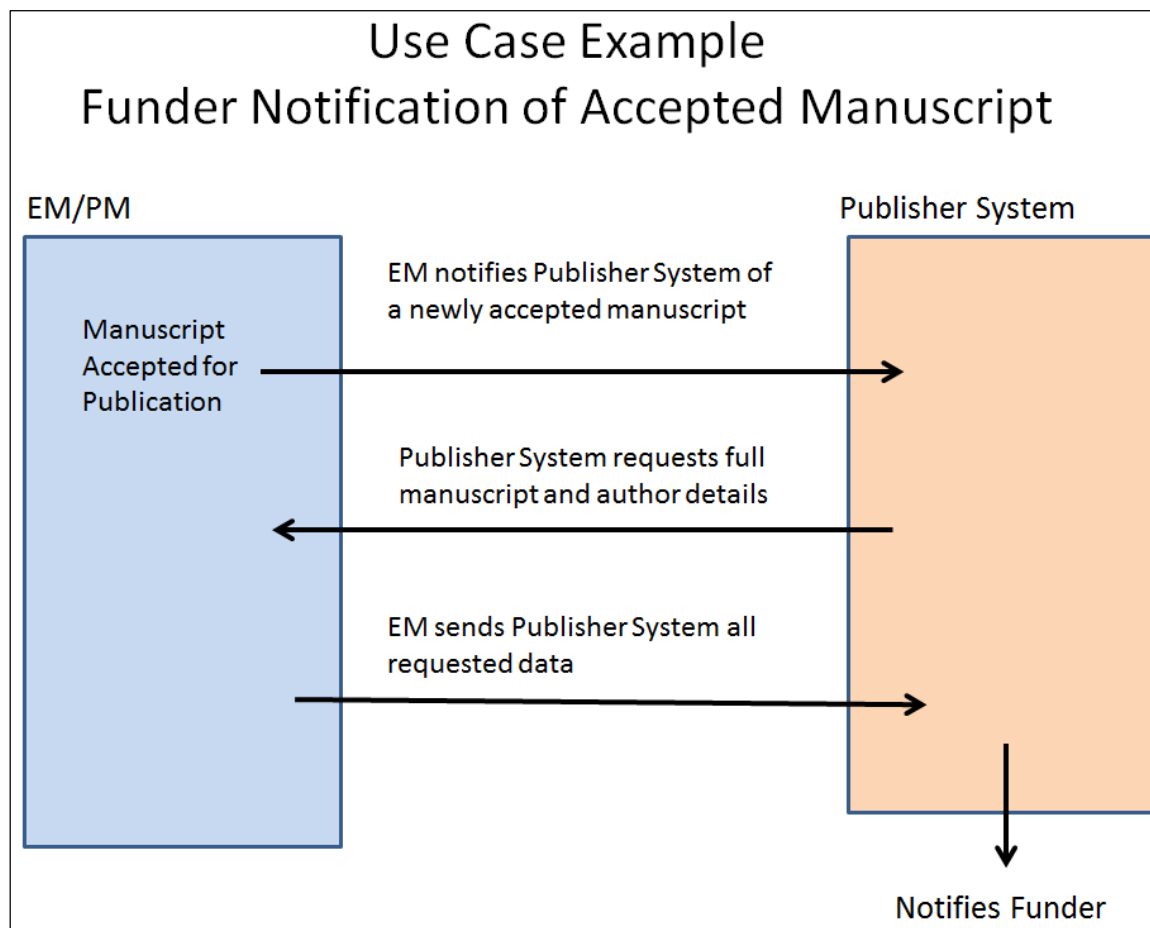
Sample workflow for API interactions



Publications can use Web Services and Notification Services to develop integrated workflows with trusted third-party applications. Some potential uses of these features include:

- Updates to customer/association management systems with author/manuscript details.
- Data transfer to systems providing additional credit to authors and reviewers.
- Workflow notifications sent to funders or publication charges systems.
- Status notifications sent to institutions (e.g., upon acceptance).
- Social media notifications.

Sample API use cases



TO CONFIGURE:

Contact your Aries Account Coordinator to enable these features and to request the full documentation and instructions.

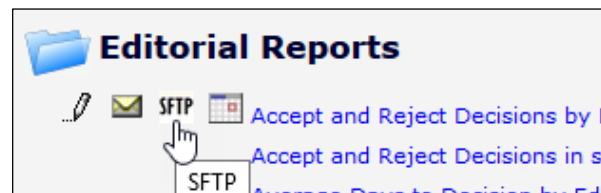
Reporting Enhancements

EAR and XEAR Report Delivery Enhancements

EM version 15.1 introduces several enhancements to report delivery for single-journal Enterprise Analytics Reports (EAR) and cross-publication Enterprise Analytics Reports (XEAR):

- Reports can be sent to an SFTP site on an ad hoc basis.
- Ad hoc reports sent via email can include an attachment in CSV format.
- Attachments in XML file format can be used with both ad hoc and scheduled reports sent via email and SFTP delivery.

Detail of ad hoc report delivery options, showing SFTP



In addition, the Report Delivery Schedule page is enhanced to allow users to configure daily delivery schedules using either calendar days or working days. The enhanced page also includes indicators for current delivery settings for a given report.

Detail of Report Delivery Schedule page, showing option for selecting calendar days or working days for “daily” delivery and available file formats for attachment

Delivery Frequency:	Daily ☒ Use Calendar Days ☐ Use Working Days
First Delivery Date:	Date 09/07/2018 (mm/dd/yyyy)
Number of Deliveries:	End after: 5 total deliveries
Delivery Method:	☒ Email ☐ SFTP
Letter:	Please Choose a Letter ☐ Attach PDF of report to email ☐ Attach Excel file of report to email ☐ Attach CSV of report to email ☐ Attach XML of report to email

TO CONFIGURE:

No configuration is necessary. Users with reporting permissions on a publication using EAR and/or XEAR will see the new options.

Impact Vizor View Added to XEAR

Impact Vizor, a reporting product from HighWire Press, is a visual analytics tool that brings together citation and usage data from multiple sources and consolidates it into configurable viewers. One feature of Impact Vizor is the Rejected Article Tracker (RAT), which provides insight into rejected journal articles, including where they are eventually published and their citation rates.

The RAT requires that data on rejected articles be pulled from EM in a specific format. The data must be presented in a tab-delimited spreadsheet, with column headings specified by HighWire, and fed into Impact Vizor in a tab-delimited text file. In previous versions of EM, this functionality was available via Enterprise Analytics Reporting (EAR) and Custom Reports, using the “Impact Vizor Final Decisions View.”

EM version 15.1 extends the functionality to Cross-Publication Enterprise Analytics Reporting (XEAR). A new “Cross-Publication Impact Vizor Final Decisions View” will enable publishers to transmit reports for all their publications in a single file.

The “Cross-Publication Impact Vizor Final Decisions View” will display the data and column headings required for corresponding with HighWire. Although the primary use case for this view is to display information on rejected submissions, the view will not be limited to displaying only those submissions that have received a reject decision. Users will use this view to create reports that are filtered to display only the papers required for the Impact Vizor RAT report. This ensures that the view can be used for other reports that Impact Vizor may require in the future.

The new view will allow publications to extract the data required by HighWire, but the publication will still need to download the data into an Excel file and manipulate it prior to sending the tab-delimited file to HighWire.

TO CONFIGURE:

No configuration is necessary. Users with reporting permissions on a publication using XEAR will see the new view.

Merge Field Enhancements

User Requests Data Removal (Unsubscribe) Merge Fields

%REQUEST_REMOVAL_USER_DEEP_LINK% inserts a hyperlink that will log in the Editor recipient and go directly to the requesting user's Search People – Update Information page. In Rich Text (HTML) letters the link displays as “User Requests Removal.” The link will work only for Editor roles with the RoleManager permission, Anonymize Users.

%REQUEST_REMOVAL_COMMENTS% will display any text entered by the requesting user in the Comments field on the Request Removal page.

Reviewer Selection Summary Deep Link

%REVIEWER_SELECTION_SUMMARY_DEEP_LINK% inserts a hyperlink that will log in the Editor recipient and go directly to the Reviewer Selection Summary page for the related submission.