

CONFIDENTIAL AND PROPRIETARY

Release Notification



**Editorial Manager/ProduXion Manager
Version 13.1 General Release Notification
1/4/2017**

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General Enhancements

Exclude Users from Batch E-mail Reminders



In EM/PM version 13.0, Automated Reminder Reports and Batch E-mail offer granularity down to eligible user roles when targeting groups of users. For manual reminder reports the selection uses the same broad criteria for narrowing the result to specific roles or Role Families, but because the entire process is manual individuals can be manually excluded by the Editor running a report. However, excluding users consistently using this method relies on staff to remember who to manually exclude or to spot them in the middle of a long report.

New in EM/PM version 13.1, two new configuration options will be added to user records accessed from Search People to determine at an individual user level whether or not reminder letters can be sent to a user. These options will be restricted to use by Editors so that Authors and Reviewers are unable to turn off reminder notifications. Editors will not require additional permissions to access these options, but the access to the new options will be limited to those who can search for and update the profiles of other users.

On the “Search People – Update Information” page an exclusion setting is available to Editors as a checkbox labeled, “Exclude this user from receiving all batch and reminder emails”. When enabled, two sub-options will be available via radio button selection; “Always” or “When Unavailable Dates are active”. Only one mode may be configured at a time. While the ‘Always’ is selected for a user account, no reminder letters, manual or automated, or Batch Emails will be sent to the email address on record for the account. The ‘When Unavailable Dates are active’ option will provide the same restriction, but only if the user has active Unavailable Dates when the query to send the reminder is run.

Sample Search People – Update Information *page (partial)*

Search People - Update Information

Mr. Jarvis Cocker  

Proxy-Registered:
Apr 04 2008 02:25:24:533PM
(Data Verified by User)

Last Modified:
Oct 18 2011 01:35:29:763PM

[Inactivate this User](#)

[Send Login Details](#)

☒ Exclude this user from receiving all batch and reminder emails:
☐ Always
☒ When Unavailable Dates are active

User Information

[Open Special Character Palette](#)

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](#)

[Additional People Details](#)

Personal Information

Title:

Given/First Name *:

Middle Name:

Family/Last Name *:

Degree:

Preferred Name:

Telephone Number:

Secondary Phone:

Secondary Phone For: ☐ Mobile ☐ Beeper ☐ Home ☐ Work ☐ Admin. Asst.

TO CONFIGURE:

From “Search People” results, click the name of user. On the subsequent Update Information page, the new exclusion settings are available on the left sidebar.

Assign Author

In EM version 13.0, Editors may invite Authors to submit Commentaries or submissions to a Proposal. Authors are then able to accept this invitation and move onto submitting the invited paper. The invited paper is always associated with its “parent” submission or Proposal throughout its lifecycle within EM.

In EM version 13.1, an ‘Assign Author’ option is added to Editorial Manager in order to better support books workflows where communication with the Author has started before EM is necessary and other invited workflows that call for a direct assignment. A new ‘Assn’ column is added to the Author Search Results grid that will allow Editors with permission to Assign an Author by selecting the checkbox in this new column. This functionality is supported through the traditional ‘Search Author’ functionality as well as within the selection of Authors via an uploaded Author List File (ALF) as introduced in EM version 13.0.

The ability to assign Authors is granted to Editors through a new RoleManager permission which is added in addition to the existing ‘Invite Authors’ permissions. Editors with both permissions are able to choose whether or not to assign or invite an individual Author. The selection options configured for an Editor are available when viewing Author search results – similar to the behaviour of the Invite/Assign Reviewer options in Reviewer Search Results. Once made, assignments display to the Author initially on the Author Main Menu in the *My Accepted Invitations* folder.

When selecting Authors under this new functionality Editors are able to assign only, invite only, or choose between both options when selecting authors, depending on the configuration of their permissions.

To accommodate the ability to Assign an Author, some of the existing “Invite Author” functionality is altered:

- The Un-Invite link appears only up to the point of Acceptance.
- An Un-Assign link appears after the point of Acceptance for an Invited Author; and right away for an Assigned Author (i.e. an Assigned Author is the same state as an Invited Author who accepts). The concept of unassigning is introduced, applying to active/in-progress author invitations and the new assignments

Unassigning an Author behaves differently for invited/accepted and assigned Authors:

- For invited/accepted Authors the promotion of Alternate Authors is triggered per the Article Type’s configuration and selection of Alternate Authors. This is the same behavior currently in place when an invited/accepted Author is uninvited

Upload Author List File Changes

In addition to enhancements to the Author searching and selection pages in the interface, processing of an Author List File (ALF) is enhanced, changing how the existing INVITE column

values are interpreted so that Authors can be selected for assignment or invitation when selected via the uploaded file.

A value of 'TRUE' in the INVITE column will mark the Author for Invitation when the ALF is uploaded. A value of 'FALSE' in the INVITE column will mark the Author for Assignment when the ALF is uploaded.

Once an ALF is loaded, both options will always be available when selecting Authors on the '*Author Candidates*' Results page regardless of an Editor's RoleManager configuration so that the selections made based on the uploaded file are always visible and adjustable by an Editor.

TO CONFIGURE:

To use the new 'Assign Author' functionality, an Editor's permissions must be adjusted so that the new 'Assign Authors (Without Permission)' option is enabled in *RoleManager*.

Sample Editor RoleManager page

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

[Expand All](#) [Collapse All](#)

- ☒ **New Submissions**
- ☒ **Editor Assignment**
- ☒ **Reviewer Invitations**
- ☒ **Editor Decisions**
- ☒ **Proposals/Commentaries**
 - Use Proposals Details Layout
 - ☐ Search All Proposals
 - ☒ Initiate Proposals
 - ☒ Invite Authors/Solicit Commentaries
 - ☐ Select Alternate Authors
 - ☐ Promote Alternate Authors
 - ☐ Remove Alternate Authors
 - ☐ Assign Authors (without Invitation)
 - ☐ Lock/Unlock predefined Article Title
 - ☐ Override Author Invited Submission Due Dates
 - ☐ View All Proposals and Submissions with Commentaries
 - ☐ Set Final Disposition on Proposals
- ☒ **General Searching and Viewing**
- ☒ **Edit Submission**
- ☒ **Discussion Forums**
- ☒ **Transmittal Form**
- ☒ **Sending E-mail**
- ☒ **Viewing and Editing People Data**
- ☒ **Flag Icons**
- ☒ **Proxy Activities**
- ☒ **Administrative and Reporting Functions**
- ☒ **Cross-Publication Login**
- ☒ **ProduXion Manager**

Once enabled, letters can be configured for the new 'Assign Author' events in *ActionManager*.

Sample RoleManager page – new events are highlighted in pink text

Author Invitation	
Event	Managing Editor Letters
Create Proposal	Proposal Created ▼
Invite Authors for Proposal	NONE ▼
Author Assigned (Not Invited) for Proposal	NONE ▼
Solicit Commentary on Submission	NONE ▼
Author Assigned (Not Invited) for Commentary	NONE ▼
Invited Submission Due Date Changed	NONE ▼
Un-invite Authors	NONE ▼
Author Unassigned after Accepting Invitation	NONE ▼
Author Unassigned after Assignment	NONE ▼
Promote Alternate Authors	NONE ▼
Author Agrees to Invitation	NONE ▼
Author Declines Invitation	NONE ▼

Hide Preferred Method of Contact

In EM version 13.0, new users have the option of specifying a Preferred Method of Contact: E-mail, Fax, Postal Mail, or Telephone when registering for EM. Preferred Method of Contact is always displayed on pages where user information is entered or maintained, and the default setting is 'E-mail', but users may change their Preferred Method of Contact to something other than e-mail. When this occurs, EM correspondence is sent to the journal office and the staff person must reach out to the user via the preferred alternative contact method.

Since so much of EM communication occurs via e-mail and other methods are a burden on journal staff, some publications do not want to give their users the option to select a Preferred Method of Contact, and/or may consider this setting to be obsolete.

In EM version 13.1, System Administrators will have the option to hide/turn off Preferred Method of Contact throughout the system. The "Forwarding E-Mail Address for Non-E-mail Preferred Method of Contact" page in *PolicyManager* is renamed Manage Preferred Method of Contact Settings and enhanced with a new setting to 'Hide' the Preferred Method of Contact.

Sample Manage Preferred Method of Contact Settings page



When Preferred Method of Contact is hidden, E-mail becomes the default method of contact. An e-mail address will be required for all new registrations and must be populated when user account information is updated in EM.

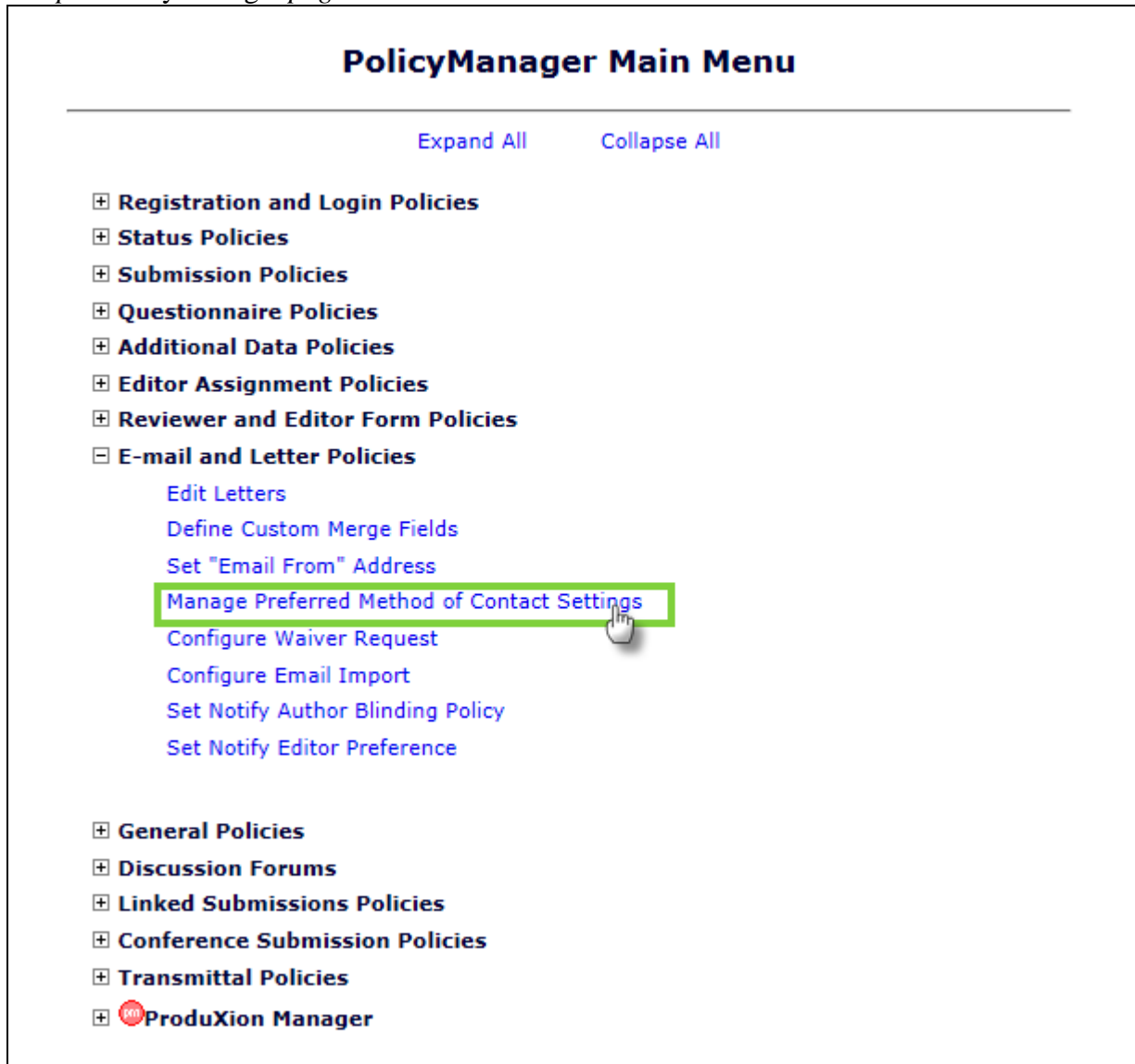
NOTE: When the System Administrator hides Preferred Method of Contact throughout the system, users who do not currently have E-mail as their Preferred Method of Contact and a valid E-mail Address will be required to provide an E-mail Address and their Preferred Method of Contact will automatically be set to 'E-mail' when the "Update My Information" page is submitted.

NOTE: If the existing Editor RoleManager sub-permission 'E-mail Not Required (Warning Only) at Proxy Registration' is selected, Editors will still be allowed to proxy register a new user without supplying an E-mail Address on the *Proxy Register New User* page. In this case, the Preferred Method of Contact radio buttons are suppressed on the page, and if an E-mail Address is not supplied all correspondence for that user is sent to the E-mail Address configured in PolicyManager.

TO CONFIGURE:

Go to *PolicyManager* and click the new “Manage Preferred Method of Contact” link under the E-mail and Letter Policies section (previously called “Forwarding E-Mail Address for Non-E-mail ‘Preferred Method of Contact’”). Select the ‘Hide Preferred Method of Contact’ checkbox and submit the page.

Sample PolicyManager page



Transfer Co-Author Questionnaires

In EM version 13.0, publications can transfer submissions from an EM publication to another EM publication. The responses provided by the Corresponding Author to Custom Questions on the Author Questionnaire and the Submission Questionnaire can be transferred, so that the Corresponding Author does not have to re-enter their answers on the recipient site; however, the responses provided by Co-Authors to the Author Questionnaire when they verify their co-authorship of the manuscript for the sending site are not transferred. New, in EM version 13.1, if a Co-Author has verified their Co-Authorship on the sending site, these responses will be transferred to the receiving site if the sites have matching Article Types and there are matching questions on the receiving site, so that the Co-Author does not have to re-enter their responses on the receiving site.

EM to non-EM submission transfer is not modified. Co-Author responses are not included in this type of transfer.

Currently, in EM version 13.0, the Co-Author confirmation statuses are transferred from the sending site, and then adjusted on the recipient site so that the Co-Author will be required to verify on the recipient site or 'register and verify', based on the transferred confirmation record and the requirements of the submission's Article Type on the recipient publication, but it does not take into account whether an Author Questionnaire is configured to be presented to the Co-Author on the receiving site. Also, after a transfer, the receiving publication can change to a different Article Type, which may have a different Author Questionnaire configured for it than the original Article Type, in which case the receiving site may want the Co-Author to be presented with the Author Questionnaire for the new Article Type. If the receiving publication wants the Co-Author to answer the Author Questionnaire from their site, they must manually reset/clear the Co-Author's confirmation status, so that when the submission moves out of the *Transferred Submissions* folder and into the regular editorial workflow, the system will detect that the Co-Author has not confirmed their co-authorship and will send a letter which asks the Co-Author to verify their co-authorship for the submission on this site and also present them with the Author Questionnaire.

New in EM version 13.1, the transfer functionality will take the presence of an Author Questionnaire for the Article Type on the receiving site into account, and automatically reset/clear a Co-Author's confirmation status if the Article Type is configured to present an Author Questionnaire to Co-Authors, since the only way a Co-Author can answer a questionnaire is through the co-authorship verification process. This will also ensure that the Co-Author is presented with the questionnaire from the receiving site.

The new functionality in EM version 13.1 will also reset/clear a Co-Author's confirmation status if the Article Type on the receiving site is configured to collect an Authenticated ORCID iD from Co-Authors and a transferred Co-Author does not have an Authenticated ORCID iD.

If after the adjustments, the Co-Author needs to verify or 'register and verify' on the recipient publication, the Co-Author will be automatically be notified by the recipient publication at the appropriate point in their workflow (New Submission or Revised Submission) and asked to

verify their co-authorship, the same as in EM version 13.0. When the Co-Author verifies their contribution status on the recipient publication, the Author Questionnaire configured for the Article Type for the appropriate revision level of the submission on the recipient publication will be presented to the Co-Author.

When the Author Questionnaire is presented to the Co-Author on the recipient site (as part of the co-authorship verification process), any responses that were transferred from the sending site are used to pre-populate the responses to the questions, so that the Co-Author does not have to re-enter their responses. Of course, they are free to change their answers. Any transferred responses that no longer apply (because a different Article Type was chosen or the Author Questionnaire is configured differently on the receiving site) are discarded.

The information and links available to an Editor on the *Author Details* page after a submission has been transferred and before it has been moved out of the *Transferred Submissions* folder and into the standard editorial workflow have been changed so that an Editor can see the Co-Author's confirmation status transferred from the sending site, and can view the Author's Details, but cannot reset a Co-Author's status (since it will be done automatically at the appropriate point), or resend a confirmation letter (since no letter has yet been sent to the Co-Author from this site), or request confirmation from this Co-Author (since the choice of Article Type and Author Questionnaire are not final, i.e. they can still be changed until the submission moves out of the *Transferred Submissions* folder and the Co-Authors are notified appropriately). After the submission moves out of the *Transferred Submissions* folder and into the regular editorial workflow, the information on the *Author Details* page reflects the Co-Author statuses for the receiving site, and the links that were suppressed while the submission was in the *Transferred Submissions* folder are again available on the *Author Details* page: 'Reset Confirmation Status', 'Request Confirmation', and 'Resend Letter'.

TO CONFIGURE:

No configuration is necessary for the Co-Author responses to be transferred.

Custom Metadata IDs for Article Types

In EM version 13.0, publications may define Additional Manuscript Details fields (AMDs), which are user-defined submission fields, and also Custom Questions to be presented to Authors of a submission. In addition, they may define their own Custom Metadata IDs and associate them with AMDs and Custom Questions. The use of the Custom Metadata IDs allows both internal and external systems to match AMD fields and Custom Questions based on their Custom Metadata IDs instead of text strings for cases in which publications have slightly different text for what is essentially the same Custom Question, or slightly different Descriptions for what is essentially the same AMD field.

A System Administrator can manually add or edit the text for a Custom Metadata ID to be associated with an AMD or a Custom Question in a textbox on the appropriate configuration page for the item. The field is optional.

New in EM version 13.1, publications may also define Custom Metadata IDs for Article Types, so that internal and external systems can match Article Types that have slightly differing names for essentially the same Article Type on two systems. This is done in PolicyManager on the enhanced *Add/Edit Article Type* page.

The screenshot shows the 'Edit Article Type' form. At the top, there are 'Cancel' and 'Submit' buttons. The 'Article Type' field contains 'Original Study' with a note 'Maximum Article Type name is 75 characters.' and a warning: 'Warning: changing the Article Type name will apply the name change to all submissions of this type, including previously submitted.' Below this, the 'Family' is set to 'Regular' and 'Editor Use Only' is a checkbox. There is a 'Hide' checkbox with a description: 'When you Hide an Article Type, the Article Type will be deactivated (not available for new manuscripts).' The 'Custom Metadata ID' field is highlighted with a green box and contains a blue information icon. Below it is a 'Select Custom Metadata ID' dropdown. At the bottom, there is a checkbox 'Allow file uploads from arXiv.org server' and a 'Similarity Check' section with three checkboxes: 'Send Reviewer PDF on Initial Submission', 'Send Reviewer PDF on First Revision', and 'Send Reviewer PDF on Final Disposition to Accept'.

Also, new in EM version 13.1, publications can pre-define sets of Custom Metadata IDs that can be selected from when adding or editing the Custom Metadata ID for an item. All Custom Metadata IDs are now assigned to a “type”, so that they can be associated with only items of that “type”. For example, a Custom Metadata ID of type “Article Type” can be associated only with Article Types, and not with AMDs or Custom Questions. A new PolicyManager page, *Define Custom Metadata IDs*, allows a System Administrator to pre-define and edit Custom Metadata IDs.

Define Custom Metadata IDs

Custom Metadata IDs are used to uniquely identify Additional Manuscript Details, Article Types, and Custom Questions for transmittals, transfers, and imports.

Click the hyperlink in a row to associate a Custom Metadata ID with an item or edit the item that one is already associated with. For example, click the hyperlinked text [Article Type](#), or [Custom Question](#), or [Additional Manuscript Detail](#). (If you do not have access to the page for that item, the item type will display as plain text and not a hyperlink.)

If a Custom Metadata ID is not currently associated with an item, you can edit or remove it. If it is, you can edit only its Description.

You can re-order the items in the list by dragging them to a new location or by clicking the 'Re-Order by ID' button. This is the order the IDs will display in the lists used to associate the IDs with Additional Manuscript Detail fields, Article Types, and Custom Questions.

You can filter the list to display only IDs of a single Type, for example, to display only those configured to be associated with Article Types.

You can also create a Custom Metadata ID on-the-fly when associating one with an item. If so, the Custom Metadata ID is also added to the list on this page, but without a Description. You may add the Description later, on this page.

If an item that has a Custom Metadata ID associated with it is removed from your publication, the Custom Metadata ID is disassociated from the item and available to be associated with another item of that type.

If an item is hidden or un-hidden, its associated Custom Metadata ID is automatically hidden or un-hidden. Hidden Custom Metadata IDs are displayed in a separate list. ([less...](#))

Re-Order by ID

Filter By: All Types ▼

Current Custom Metadata ID List

+ Add Another Custom Metadata ID

		AT_Original-Paper Standard article, usually presenting new results	Article Type
		CQ_copyright-question copyright question	Custom Question
		AMD_RA1-DOI Related Article 1 DOI	Additional Manuscript Detail
		very_long_custom_metadata_id_is_truncated_when_displayed_here... very long description of custom metadata id is truncated when displayed here...	Article Type
		AMD_text-pages	Additional Manuscript Detail

+ Add Another Custom Metadata ID

[Edit Article Types](#)
[Create Custom Questions](#)
[Add/Edit Additional Manuscript Detail Fields](#)
[PolicyManager Main Menu](#)

Users can continue to enter and edit the text of a Custom Metadata ID on the configuration page for an item “on-the-fly” as before, but can now also choose to select a Custom Metadata ID from an overlay on the configuration page by clicking on the link ‘Select Custom Metadata ID’, as seen on the partial screenshot of the *Edit Article Type* page below.

The system handles the Custom Metadata IDs automatically when an item is removed or hidden or un-hidden. If an item is removed from the system, the Custom Metadata ID is automatically disassociated from the item and available to be used for other items of the same type. If an item is hidden or un-hidden, its associated Custom Metadata ID is also hidden and un-hidden automatically.

The following submission production transmittal methods are updated to include the value of the Custom Metadata ID for an Article Type (if one is associated with it):

1. JATS 1.1A Production Task Export
2. JATS 1.1A V2 Production Task Export

The following editorial transmittal methods are updated to include the value of the Custom Metadata ID for an Article Type (if one is associated with it):

1. Single Destination Transmittal – JATS 1.1A
2. Single Destination Transmittal – Springer
3. Single Destination Transmittal – Springer Book Series
4. Single Destination Transmittal – Springer Open Peer Review

For the JATS transmittal methods, the optional “id” attribute is added to the “subject” element. For example:

```
<subj-group subj-group-type="Article Type">
  <subject id="Original_Research">Original Study</subject>
</subj-group>
```

</subj-group>

For the Springer transmittal methods, the Custom Metadata ID is added to the DTD/schema as a required element.

Two import methods for importing into the *Transferred Submissions* folder are updated to include an optional Custom Metadata ID field for the Article Type:

1. *JATS Manuscript Import (Transferred Submissions)* for importing submissions from other EM sites
2. *JATS Manuscript Import (Transferred Submissions)* AKA the *EM Ingest Import Method* for importing from third parties such as Manuscript Service Providers and Author Portals.

For submission transfer to other EM sites or to non-EM sites, the Custom Metadata ID for an Article Type (if one is associated with it) is transferred. On EM sites, the Custom Metadata ID is used to match the submission to an Article Type on the receiving site.

The new Custom Metadata IDs for Article Types are written to the UDB, the same as the existing Custom Metadata IDs for AMDs and Custom Questions.

The Custom Report and EAR view *Custom Metadata Identifiers Information View* is updated to include Custom Metadata IDs associated with Article Types and Custom Metadata IDs not associated with any item.

TO CONFIGURE:

1. The publication can use the new PolicyManager page *Define Custom Metadata IDs* to pre-define Custom Metadata IDs that can then be associated with items (AMDs, Custom Questions, or Article Types).
2. The publication can use the new section on the PolicyManager page *Add/Edit Article Type* to associate Custom Metadata IDs with Article Types.
3. The publication can use the new link 'Select Custom Metadata ID' on the PolicyManager page *Add/Edit Additional Manuscript Detail Field* to associate Custom Metadata IDs with AMDs.
4. The publication can use the new link 'Select Custom Metadata ID' on the enhanced PolicyManager page *Add/Edit Custom Question* to associate Custom Metadata IDs with Custom Questions.

Incomplete Submission Step Indicator

In EM version 13.0, during the submission process, authors are allowed to leave much of the required information blank and proceed on to other steps, in case they do not have the necessary information at hand and need to go look it up or get it from a co-author later. If they have entered any information for a step, a checkmark is displayed for the step, which makes it look like the step is complete. When the author is informed at the Summary Following Attach Files page that required information is missing, they find it difficult to locate the step for which information is missing.

In EM version 13.1, the checkmark displays beside only completed steps and introduces a new symbol (▲) that will be displayed for any submission step where required information is missing or incorrectly formatted.

New Submission

- ✓ Select Article Type
- ✓ Enter Title
- Add/Edit/Remove Authors
- ✓ Funding Information
- ✓ Select Section/Category
- ✓ Submit Abstract
- ▲ Enter Keywords
- ▲ Select Classifications
- ✓ Additional Information
- ▲ Enter Comments
- ▲ Suggest Reviewers
- Oppose Reviewers
- ▲ Request Editor
- ✓ Select Region of Origin
- ➔ Attach Files

Please Attach Files

Insert Special Character

Required **Items** are marked with a *. When all **Items** have been attached, click **Next** at the bottom of the page.
(I am customizable.)

Item: *Abstract

Enter a **Description** and select a **Delivery Method**. To deliver files online, either choose files or drag or drop files.

Description: Abstract

Delivery Method: ☒ Online Web System ☐ Offline ☐ URL/URI/External Resource

Choose Files Or Drag & Drop Files Here

No Items have yet been attached for this submission.
(I am customizable.)

for New Submission (Text associated with the "Items for this Submission" session prior to a file attachment)

Previous Next

Default Reviewer Letters for Revision

In EM version 13.0, publications can configure a default Invitation or Assignment letter for Reviewers to receive in *ActionManager*. Creating default letters can make the Reviewer Invitation process quicker since most of the configuration is done ahead of time.

New in EM version 13.1, all of the ‘Reviewer Assigned’ events in *ActionManager* (‘Reviewer Invited’, ‘Reviewer Assigned’, ‘Reviewer Agree’, and ‘Promote Alternate Reviewers’) can have three default letters associated with them based on whether the submission is original (R0), a Revision (R1+), or a Revision for which the Reviewer has reviewed a previous version.

Sample part of a Reviewer Role’s ActionManager grid

Reviewer Assigned	Editor Unassigned Notification	NONE
	Editor Reassigned	NONE
	Request Unassigned Reviewer	NONE
	Reviewer Invited	Original Submission: Author Questionnaire Reviewer Invitation HTML Revision - Re-Invite: Author Questionnaire Reviewer Invitation HTML Revision - First Invite: Author Questionnaire Reviewer Invitation HTML Select Letters
	Reviewer Assigned (Not Invited)	Original Submission: Reviewer Assignment Letter Revision - Re-Invite: Reviewer Assignment Letter Revision - First Invite: Reviewer Assignment Letter Select Letters
	Reviewer Agree	Original Submission: Reviewer Instructions and Due Date Revision - Re-Invite: Reviewer Instructions and Due Date Revision - First Invite: Reviewer Instructions and Due Date Select Letters
	Reviewer Decline	NONE
	Review Due Date Changed	Reviewer Notification Due Date Changed
	Un-Invite Reviewers Before Agreeing to Review	Reviewer Uninvited Notice
	Un-assign Reviewers After Agreeing to Review	Reviewer Uninvited Notice
	Promote Alternate Reviewers	Original Submission: Reviewer Invitation Revision - Re-Invite: Reviewer Invitation Revision - First Invite: Reviewer Invitation Select Letters
	Re-open Review	NONE
	Review Assignment Completed	Reviewer Thank You
	Late Review	NONE
	Required Review Complete	NONE
	Required Review Revert	NONE

Clicking the ‘Select Letters’ link (outlined in purple above) in the Letters column for one of the ‘Reviewer Assigned’ events displays a pop up window where a System Administrator can select which default letters are sent when the submission is an Original Submission, Revision (Re-Invite previous Reviewer), and Revision (First Invitation). All letters in the ‘Reviewer Invitation’ letter family are displayed in the drop-down list for each submission status.

Sample pop-up for the Reviewer Invited event in ActionManager

Reviewer Assigned	
Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	<div> <div> <p>You may select a different default letter from the Reviewer Invitation letter family for each of the following cases:</p> <p>Original Submission:</p> <p>Revision - Re-Invite (Reviewer has reviewed a previous version):</p> <p>Revision - First Invite (Reviewer has not reviewed a previous version):</p> </div> <div> <p>Reviewer Invitation</p> <p>Author Questionnaire Reviewer Invitation HTML</p> <p>Author Questionnaire Reviewer Invitation HTML</p> </div> </div> <div> <p>Cancel</p> <p>Save</p> </div>
Reviewer Assigned	<p>Author Questionnaire Reviewer Invitation HTML</p> <p>Reviewer Assignment Letter</p> <p>Reviewer Assignment Letter</p> <p>Reviewer Instructions and Due Date</p> <p>Reviewer Instructions and Due Date</p> <p>Reviewer Instructions and Due Date</p> <p>Select Letters</p>
Reviewer Agree	<p>Revision - First Invite</p> <p>Select Letters</p>
Reviewer Decline	NONE
Review Due Date Changed	Reviewer Notification Due Date Changed
Un-invite Reviewers Before Agreeing to Review	Reviewer Uninvited Notice
Un-assign Reviewers After Agreeing to Review	Reviewer Uninvited Notice
Promote Alternate Reviewers	<p>Original Submission: Reviewer Invitation</p> <p>Revision - Re-Invite: Reviewer Invitation</p> <p>Revision - First Invite: Reviewer Invitation</p> <p>Select Letters</p>
Re-open Review	NONE

TO CONFIGURE:

Letters must be created in the “Reviewer Invitation” letter family on the “Edit Letters” page in *PolicyManager*.

To select default letters for revisions, go to *ActionManager* and click the “[Reviewer Role] Letters” link to access the *ActionManager* grid for the desired Reviewer Role. For each of the “Reviewer Assigned” events (‘Reviewer Invited’, ‘Reviewer Assigned’, ‘Reviewer Agree’, and ‘Promote Alternate Reviewers’), click the “Select Letters” link to associate default letters.

Alternate Reviewer Promotion Configuration Option

In EM version 13.0, publications can choose to have Alternate Reviewers automatically promoted at the time a Reviewer declines an invitation, is un-invited, or is un-assigned. This is set in *PolicyManager*, via the *Edit Article Type* page; each Article Type can have its own setting. The system will first promote any Linked Alternate Reviewers for that review; if there are none, then it will look to the general pool of (non-Linked) Alternate Reviewers. Automatically promoted Reviewers must have a matching Reviewer Role with the outgoing primary Reviewer for a successful promotion.

New in EM version 13.1, the existing Article Type setting, ‘Automatically Promote Alternate Reviewers’ is enhanced, and when enabled, can now ignore the Reviewer Role when automatically promoting an Alternate Reviewer when there is no linked Alternate Reviewer. A new sub-option “Only Promote unlinked Alternate Reviewers with MATCHING Roles” checkbox configuration option is added to the *PolicyManager*, *Edit Article Type* page. Since the sub-option of Alternate Reviewer promotion with matching Reviewer Roles is existing functionality, this setting is enabled by default upon upgrade for Article Types currently configured to use Automatic Reviewer Promotion.

TO CONFIGURE:

To set an Article Type to ignore matching Reviewer Roles when automatically promoting unlinked Alternate Reviewers, edit any Article Type in *PolicyManager*>‘Edit Article Types’. In the ‘Reviewer Parameters’ section, make sure that the ‘Automatically Promote Alternate Reviewers’ is enabled and the sub-option ‘Only Promote unlinked Alternate Reviewers with MATCHING Roles’ is de-selected.

Partial Edit Article Type page shown

Editor Assignment Chain Template: Original Study Temp

Select an Assignment Chain Template to allow the entire Editor Chain to be assigned in one action, not just the first Editor.

Reviewer Parameters:

Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.

Number of Days Reviewer has to Respond to Invitation:

Automatically Unassign Reviewers n days after 'Date Review Due'

Automatically Un-assign late Reviewers with partial review saved.

Automatically Promote Alternate Reviewers: ☒

Only Promote unlinked Alternate Reviewers with MATCHING Roles: ☒

☒ Continue promoting Alternates until there are no more Alternates in queue

☐ Only promote Alternate Reviewers when the combined number of Agreed and Completed Reviews is less than the current value of the Submission's own 'Required Reviews Complete' value

Set the values required for a new and/or revised manuscript

Days to Review This Article Type:

New Submission:

Revised Submission:

PDF Cover Page Layout: Editor\Author Version Reviewer Version

Must be 0 or greater.

Set this value to zero to turn off the automatic un-assignment process for all Reviewers who have not responded to an invitation.

Set this value to zero to turn off the automatic un-assign process for all Reviewers who have accepted an invitation but not submitted a review on time.

Select this box to automatically un-assign late Reviewers even if they have a partial review saved.

Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines, is un-invited, or un-assigned.

Select this box to only Promote unlinked Alternate Reviewers with MATCHING Reviewer Roles.

ORCID Enhancements

In EM/PM version 13.0, once a publication configures the ORCID iD to be a registration field an ORCID iD field is displayed in several locations. Where a person is editing their own information, we also show a link allowing the user to retrieve their ORCID directly from their ORCID record (we call this ‘Authenticating’ the ORCID iD as the subsequent interaction with the ORCID site proves to EM that the user owns that ORCID iD).

New in 13.1, the use of ORCID during user registration is expanded to allow the user to not only retrieve their ORCID iD in this way, but also retrieve name and contact details from their ORCID record via the same interaction.

The pre-registration page has been redesigned to replacing the existing ORCID field with a new button allowing the user to register using details from their ORCID record:



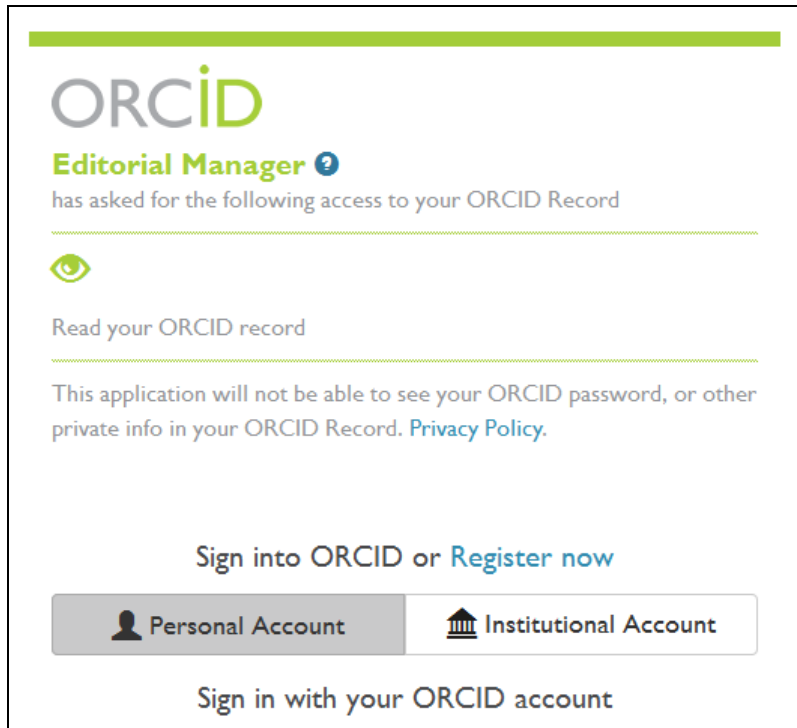
The screenshot shows a web form titled "Choose a Registration Method" with a link "Insert Special Character" in the top right. The main heading is "Retrieve your details from the ORCID registry:". Below it is a button with an ORCID iD icon and the text "Use my ORCID record". Underneath, the heading is "Or type in your details and continue to register without using ORCID:". This is followed by three input fields labeled "Given/First Name*", "Family/Last Name*", and "E-mail Address*". To the right of these fields is a "Continue >>" button. At the bottom, there is a warning message: "WARNING - If you think you already have an existing registration of any type (Author, Reviewer, or Editor) in this system, please DO NOT register again. This will cause delay or prevent the processing of any review or manuscript you submit. If you are..."

Users who select the new option will experience the standard ORCID authorization interaction, giving EM permission to read information from their profile.

You can also choose to make this interaction the default registration option for *all* EM registrations, so that simply clicking on any ‘Register’ link will bypass this page and just trigger the ORCID interaction immediately.

There is also a new ‘Register with EM via ORCID’ URL that you can use in your websites, or emails to your users. Clicking this link takes the user to EM to check they aren’t already logged in, then immediately triggers the ORCID interaction (again bypassing the pre-registration page, above).

Normal registration will be offered as a fallback option if ORCID registration fails for any reason (or the user can re-try the ORCID registration if they wish).



Depending on the registrant's employment history recorded in ORCID, and their privacy settings, on return EM might ask them to confirm which affiliation they are submitting from:

Select Affiliation to Register with

These are contact details from your ORCID profile. Please choose one to base your registration on.

You will be able to change this information before completing your registration.

Proceed

☐ New

UK

☒ 12 Aug 2015 –

Visiting Professor
 Department of Chemistry
 University of Delaware
 Newark
 Delaware
 US

☐ 10 Mar 2010 –

Dean
 Department of Chemistry
 MIT
 Boston
 Mass.
 US

☐ 23 Jan 2002 – 20 Feb 2010

Professor
 Department of Chemical Physics and Ne...
 University of Delaware
 Newark
 Delaware
 US

☐ 03 Aug 1998 – 30 Sep 2001

Lecturer
 Department of Chemistry
 University of Delaware
 Newark
 Delaware
 US

Proceed

On choosing an affiliation, or immediately on return from ORCID if they have only one affiliation, the user will be taken to the existing registration form, pre-populated with information taken from their ORCID profile. They will have to fill in any missing information that you have configured as 'Required', and may then submit their registration as normal.

If they are not already registered under that ORCID iD, they are taken to the main registration page with several fields pre-populated:

ORCID iD Retrieved

ORCID iD match

Your ORCID iD is already registered with this publication.


ORCID iD:

0001-1234-5555-987X

is linked to:

Dr John Q MacJohn BSc
jqmacjohn@emtesting.co.uk jmj@emtesting.co.uk
bartarolli@emtesting.co.uk

This means you can simply log in to this existing account.

Proceed with Login

Cancel

TO CONFIGURE: The ability to Register via ORCID, instead of simply retrieving an ORCID iD, is standard functionality once you have enabled ORCID iDs as a registration field. If you are not yet collecting ORCID iDs on registration, enable the ORCID iD on the ‘Edit Registration Fields’ page under the *PolicyManager* menu.

NOTE: We recommend that you also check the ‘Require Users to Authenticate with ORCID’ option as well, so users always ‘Authenticate’ their ORCID iD and cannot simply type or paste in an ORCID iD.

If you want to make ORCID registration the default option, for example to increase the proportion of your users who supply one, then on the same page you should also check the ‘Ask Users to Register via ORCID by Default’ option, also new to 13.1.

If you want to include a link in your website, or in an email, for users to register with your publication’s EM Site (via ORCID), the link target is formed by appending “/RegisterWithORCID.aspx” to your journal’s EM site URL, e.g.:

[https://www.editorialmanager.com/\[JOURNAL_CODE\]/RegisterWithORCID.aspx](https://www.editorialmanager.com/[JOURNAL_CODE]/RegisterWithORCID.aspx)

[http://www.edmgr.com/\[JOURNAL_CODE\]/RegisterWithORCID.aspx](http://www.edmgr.com/[JOURNAL_CODE]/RegisterWithORCID.aspx)

Edit Registration Fields

Please select the fields you would like to require in the user Registration process. These fields will be designated with an asterisk (*) on the Registration, Update My Information, and Search People pages. Fields in bold text are required by Editorial Manager and cannot be made Optional by the publication.

Some system fields allow accompanying secondary fields. These secondary fields may be displayed on the registration pages to collect information in a different language or character set. The maximum length and type of the data entered in the secondary field is the same as the system field.

To make a personal identifier or secondary field required, select the first checkbox. To Hide the identifier or secondary field, select the 'Hidden' checkbox. The Required and Hidden checkboxes cannot both be selected. If an identifier or secondary field is Hidden, the field is no longer available for data entry, and any values previously entered into this field are not displayed on any page in the system.

If you decide to collect an ORCID iD, you can force users to retrieve an Authenticated ORCID using a secure API. Enabling the ORCID allows users to register with your publication using metadata from their ORCID profile. You can choose to make this the default option when registering with your publication.

Required	Hidden	System Field
<input checked="" type="checkbox"/>		Title
<input checked="" type="checkbox"/>		Given/First Name
<input type="checkbox"/>		Middle Name
<input checked="" type="checkbox"/>		Family/Last Name
<input type="checkbox"/>		Degree
<input type="checkbox"/>		Preferred Name
<input checked="" type="checkbox"/>		Telephone Number
<input type="checkbox"/>		Fax Number
<input type="checkbox"/>		Secondary Telephone Number
<input type="checkbox"/>		Secondary Telephone Number is for
<input checked="" type="checkbox"/>		E-mail
<input checked="" type="checkbox"/>		Preferred Method of Contact
<input type="checkbox"/>	<input type="checkbox"/>	ISNI
<input type="checkbox"/>	<input type="checkbox"/>	ORCID
		<input type="checkbox"/> Require users to Authenticate with ORCID
		<input type="checkbox"/> Ask users to Register via ORCID by default
<input type="checkbox"/>	<input type="checkbox"/>	PubMed Author ID

The rest of the page is unchanged.

If you want EM to allow users to log in if they have already registered using the same ORCID iD (i.e. this person is re-registering a second time to submit a paper, forgetting their previous registration), then enable the existing 'Login via ORCID' setting on the 'Configure Login Page' under the *PolicyManager* menu.

Configure Login Page

Please select any alternative, third party Login options you also wish to enable.

☒
 Login via ORCID

If you want to customize various components of the publication's Login page, you can change the settings and modify the HTML in the text boxes below. We strongly suggest that you test the changes in a separate HTML editing tool (e.g. Dreamweaver), and preview the HTML and/or theme color in different browsers to ensure the page displays properly on all platforms. In other words, if you want to experiment with different theme colors, you should do so outside the system, and

Note that if you do so, users will be able to use ORCID Single-Sign-On to log in as soon as the registration process finds their existing *authenticated* ORCID iD; if you do not, EM will still give them the option to have their previous details sent to them when it finds a previous registration.

In EM/PM 13.0, publications can collect ORCID iDs from Corresponding Authors who don't have one as part of the submission process, as well as during Registration. In 13.0, this configuration was between Hidden or Optional and so authors could still choose not to supply their ORCID iD if it was enabled.

New in 13.1, we have extended the existing Article Type configuration so that you may now make having an Authenticated ORCID iD 'Required' for the Corresponding Author of a manuscript.

Corresponding Authors will see the same option as before if they do not have an Authenticated ORCID at the time they go to submit, but if they choose NOT to retrieve their ORCID iD, they will be prevented from completing the submission process:

New Submission

➔

Select Article Type

Enter Title

Please Select an Article Type

Please select an Article Type of 'Original Article', unless you are submitting a Letter to the Editor, or have previously contacted the publication to gain agreement to submit another type.

Choose Article TypeOriginal Article

An Authenticated ORCID iD is required for this Article Type

This publication requires that Authors Link to their ORCID record to Authenticate their ORCID iD before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

Use the button below to go to ORCID, log into your record there – or create one – and authorize the return of your ORCID Identifier. You must do this unless you intend to change the designated Corresponding Author for this submission.

ORCID iD: None

Link to ORCID Record

What is ORCID?

Next

New Submission

➔

Identifier Request

Enter Title

Please Confirm your ORCID iD

An Authenticated ORCID iD is required for this Article Type

Authenticate their ORCID iD before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

Use the button below to go to ORCID, log into your record there – or create one – and authorize the return of your ORCID Identifier. You must do this unless you intend to change the designated Corresponding Author for this submission.

ORCID iD: None

Link to ORCID Record

What is ORCID?

Next

WARNING: Corresponding Authors must supply an Authenticated ORCID iD. Are you sure you want to proceed without retrieving your ORCID iD?

OK

Cancel

New Submission

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- Select Section/Category
- Submit Abstract
- Enter Keywords
- Select Classifications
- Additional Information
- Enter Comments
- Suggest Reviewers
- Oppose Reviewers
- Request Editor
- Select Region of Origin
- Attach Files

Summary Following Attach Files

Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required Items are marked with *. You can change the order by re-numbering the files.

	Online	Offline		Online	Offline
Covering letter	0	0	Figure	0	0
Manuscript	0	0	Table	0	0

You cannot complete your submission until the following requirements are met (click on the bold text to be navigated to the appropriate step):

- You did not retrieve your ORCID iD on the **Select Article Type** step.
- Required information is missing from the **Additional Information** step.
- There are not enough **Suggested Reviewers**.

Previous

The setting also applies after the Corresponding Author is changed to a new person by the original Corresponding Author (the person submitting the manuscript) – we now check for both Optional and Required configurations, and display a warning when the new Corresponding Author attempts to Approve the PDF:

Submissions Waiting for Approval by Author John MacJohn

If no Actions appear for your submission, please wait a few minutes for your PDF to be built. The Actions appear automatically when your PDF is available.

The 'Edit Submission' link allows you to fix or alter your submission. Please use 'Edit Submission' to make changes to the meta-data and

The 'Remove Submission' link allows you to permanently remove your submission. Please use 'Remove Submission' to permanently remove your submission.

You have to check the submission status before you can approve it.

Please use 'Update My Information' and the Fetch/Register link to retrieve or create your ORCID ID.

Update My Information Proceed without ORCID iD

Action	Submission	Date	Status
View Submission Edit Submission Approve Submission Remove Submission Send E-mail	Nothing to declare: a history of airport security	Jan 28 2016 10:16AM	Needs Approval by Author
View Submission Edit Submission Approve Submission Remove Submission Send E-mail	10.2 Testing Initiate Production case 3b	Aug 14 2013 5:55AM	Needs Approval by Author

Edit Article Type

Cancel Submit

Article Type: Rapid communication
Maximum Article Type name is 75 characters.
Warning: changing the Article Type name will apply the name change to all submissions of this type, including previously submitted manuscripts/submissions.

Family: Regular Editor Use Only: ☐

☐ Hide When you Hide an Article Type, the Article Type will be deactivated (not available for new manuscripts).
☐ Allow file uploads from arXiv.org server

Similarity Check:
☐ Send Reviewer PDF on Initial Submission
☐ Send Reviewer PDF on First Revision
☐ Send Reviewer PDF on Final Disposition to Accept

Duplicate Submission Check: ☐ Check for duplicate submissions to Editorial Manager

Author Parameters
Number of days Author has to Revise Submission: First Revision: 93 Subsequent Revisions: 62
Set this value to zero if you do not want to use Revision Due Dates.

Authenticated ORCID ID Request: Hidden Optional Required
Set this to Optional to ask the Corresponding Author to retrieve and/or authorize their ORCID ID when submitting a manuscript. Set to Required to further prevent submission if they do not then retrieve their ORCID ID.

Authors must suggest a minimum of 0 Reviewers when submitting their manuscripts.

Co-Author Parameters
Register/Verify Other Authors: Corresponding Author only
Authenticated ORCID ID Request: Hidden Optional
This asks the author to retrieve their ORCID using a secure Authentication mechanism during Co-Author Verification. Select this box to require Co-Authors to respond to the Author Questionnaire in order to confirm contributing authorship.

All Authors Parameters
Contributor Roles: Optional
When Contributor Roles are set to "Display" on the Set Other Author Parameters page, this option allows you to specify whether they are "Optional" or "Required" for this Article Type.

The rest of the page is unchanged

NOTE: This allows you to configure your publications so that the ORCID may be optional when registering (e.g. so Reviewers and Editors do not need one), but mandatory for Authors who wish to submit. So you may wish to check the ORCID iD configuration on the 'Edit Registration Fields' page under PolicyManager.

TO CONFIGURE: Go to the existing 'Edit Request Authenticated ORCID iD Instructions' page under *PolicyManager*, and check the instructions there – we have modified the default text for the existing 'Corresponding Author for Submission' configuration, and relabeled it to 'Corresponding Author ORCID iD Optional for Submission'; and we have added three new sets of instructions to check:

- Instructions for the new case where the ORCID iD is Required for the Corresponding Author on submission, displayed on the Select Article Type step.
- Two new Instruction texts for the same Optional and Required settings, to be displayed to a new Corresponding Author when they go to Approve the Submission on viewing the PDF.

Edit 'Request Authenticated ORCID iD' Instructions

Enter the instructions to be displayed when requesting an Authenticated ORCID Identifier from the Corresponding Author during manuscript submission or Approval, or from a Co- Author during Other Author verification. These appear when the associated check has been configured under the Article Type for a submission, and the author in question has not yet retrieved and authenticated an ORCID ID. For Corresponding Authors, this check can be 'Optional' or 'Required'; if 'Required', the submission process cannot be completed until they have an authenticated ORCID ID. When the Corresponding Author is changed during submission, the new Corresponding Author will be asked for their ORCID ID when they go to view and Approve the submission.

[Cancel](#) [Submit](#)

Area	Instructions
Corresponding Author ORCID iD Optional for Submission	<p>Insert Special Character</p> <p>This publication requests that Authors Link to their ORCID record to Authenticate their ORCID ID before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

 Use the button below to go to ORCID, log into your record there &ndash; or create one &ndash; and authorize the return of your ORCID Identifier.</p> <p>View Default Instructions Revert to Default Instructions</p>
Corresponding Author ORCID iD Required for Submission	<p>Insert Special Character</p> <p>This publication requires that Authors Link to their ORCID record to Authenticate their ORCID ID before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

 Use the button below to go to ORCID, log into your record there – or create one – and authorize the return of your ORCID Identifier. You must do this unless you intend to change the designated Corresponding Author for this submission.</p> <p>View Default Instructions Revert to Default Instructions</p>
Changed Corresponding Author ORCID iD Optional for Approval	<p>Insert Special Character</p> <p>This publication requests that Authors Link to their ORCID record to Authenticate their ORCID ID for this type of submission. You only need to do this once in order to permanently associate your ORCID record with your user record here for future submissions.

 Please use 'Update My Information' and the Fetch/Register link to retrieve or create your ORCID ID.</p> <p>View Default Instructions Revert to Default Instructions</p>
Changed Corresponding Author ORCID iD Required for Approval	<p>Insert Special Character</p> <p>This publication requires that Authors Link to their ORCID record to Authenticate their ORCID ID for this type of submission and you will not be able to submit it until you do. You only need to do this once in order to permanently associate your ORCID record with your user record here for future submissions.

 Please use 'Update My Information' and the Fetch/Register link to retrieve or create your ORCID ID.</p> <p>View Default Instructions Revert to Default Instructions</p>
Co-Author ORCID iD Optional during Verification	<p>Insert Special Character</p> <p>This publication requests that Authors link to their ORCID record to retrieve an 'Authenticated' ORCID Identifier. This will support the correct attribution of this submission to you if accepted for publication. If you have not yet registered for an ORCID ID, you can also use the button below to register and authenticate a new one.</p> <p>View Default Instructions Revert to Default Instructions</p>


[Cancel](#) [Submit](#)

In EM/PM 13.0, authors who wish to change the Corresponding Author are given a list of names that match the supplied details, and they may choose one to Verify (by supplying that person's username).

New in 13.1, this list will now display the ORCID iDs for the listed authors:

Select an Author

There were registered author(s) found with only the first and last name provided. Please click on the 'Verify' link next to the author that best matches the one you meant. You will then be prompted for a username to verify the identity of the author. You can also press the 'Continue and Register' button if none of the authors is a correct match and you want to register a new author.

First Name	Middle Initial	Last Name	Affiliation	City	ORCID iD	E-mail Address	
Anne		Author	Rebelstart University	Londinium		author1@emtesting.co.uk	Verify
Anne	A.	Author	1	There's	1234-5678-0001-999X	jxyzannauth@emtesting.co.uk	Verify
Anne	ABC	Author	1	There's	0001-1234-5678-999X 	smacrae@ariessys.com	Verify

Cancel

Continue and Register >>

TO CONFIGURE: No configuration required; if the ORCID iD exists for any author, it will be listed.

Custom Invited Submission Proposal Numbering

In EM version 13.0, Invited Submissions are numbered according to the publication-defined setting on the ‘Set Manuscript Number Format’ page in *PolicyManager*: ‘Manually Assign Manuscript Number’, ‘Automatically Assign Manuscript Number at Author Submission’, or ‘Automatically Assign Manuscript Number when an Editor is Assigned’. Publications can only use one of these settings for all submissions that pass through the EM/PM workflow. Invited Submissions related to a single Proposal might not have sequential Manuscript Numbers, depending on the Manuscript Number assignment method and the timing of the submitted papers.

New in EM 13.1, ‘Invited Submission Manuscript Number’ format options are added for Article Types in the Proposal family. The selected ‘Invited Submission Manuscript Number’ format is configurable on the ‘Edit Article Type’ page in *PolicyManager* and will apply to all invited or assigned submissions associated with the Proposal of that Article Type. Two Manuscript Number format options are available:

- “Use format configured on ‘Set Manuscript Number Format’ page”
 - This is the default selection and existing functionality. Selecting this Manuscript Numbering format will use the settings configured by the publication on the ‘Set Manuscript Number Format’ page in *PolicyManager*.
- “Use Prefix + Incrementing Number entered on the ‘Initiate Proposal’ page”
 - If this option is selected, each time a Proposal is initiated with this Proposal Article Type, the Proposal creator must enter a Prefix, Starting Number, and Minimum number of digits in Starting Number that will be used only for invited submissions associated with that Proposal. The Editor is essentially creating the template for the Manuscript Numbers automatically generated for the Proposal’s Invited Submissions.
 - This option ensures that any Invited Submissions have sequential Manuscript Numbers and can be easily identified as belonging to the parent Proposal.

Sample Initiate Proposal page – Use Prefix + Incrementing Number entered on ‘Initiate Proposal’ page has been enabled for this Proposal Article Type

Initiate Proposal

Pre-selecting an article type for invited submissions is optional. The 'Author Will Select' option allows the invited Author to select from a list of invited article types.

* Article Type:	Special Issue
* Schedule Group:	Super Group
Pre-select Article Type for Invited Submissions generated from this Proposal:	Author Will Select <input type="button" value="v"/>
* Title:(Limit 75 words)	Word Count: 2

[Insert Special Character](#)

Mr. Pibb

Target Publication Date:	Nov 12 2013 12:00:00:000AM
Target Publication Volume:	500
Target Publication Issue:	1
Page Budget:	<input type="text"/>
Black and White Image Budget:	<input type="text"/>
Color Image Budget:	<input type="text"/>
Author Response Due: Number of Days Author has to Respond to Invitation	<input type="text" value="5"/> <small>A value of zero indicates the Response due date feature is not being used.</small>
Author Submission Due: Number of Days prior to Target Publication Date	<input type="text" value="5"/> <small>A value of zero indicates the Submission due date feature is not being used.</small>

*** Invited Submission Manuscript Number Format:**

Prefix Required field

Starting Number Required field

Minimum Number of digits in Starting Number Required field

After an Editor has entered values for the Prefix, Starting Number, and Minimum Number of digits in Starting Number, the resulting new Manuscript Number Format for the Proposal's Invited Submissions can be viewed by clicking the 'Preview' button. This is a helpful way to ensure that the new Manuscript Number Format is spaced correctly, etc.

Sample Initiate Proposal page – Use Prefix + Incrementing Number entered on ‘Initiate Proposal’ page has been enabled for this Proposal Article Type. The Manuscript Number Format is being previewed:

Initiate Proposal

Pre-selecting an article type for invited submissions is optional. The 'Author Will Select' option allows the invited Author to select from a list of invited article types.

* Article Type:	Special Issue
* Schedule Group:	Super Group
Pre-select Article Type for Invited Submissions generated from this Proposal:	Author Will Select <input type="button" value="v"/>
* Title: (Limit 75 words)	Word Count: 2

[Insert Special Character](#)

Mr. Pibb

Invited Submission Sample Manuscript Number
 Pibb-Study-2016-01

Target Publication Date:	
Target Publication Volume:	
Target Publication Issue:	
Page Budget:	
Black and White Image Budget:	
Color Image Budget:	
Author Response Due: Number of Days Author has to Respond to Invitation	5 <small>A value of zero indicates the Response due date feature is not being used.</small>
Author Submission Due: Number of Days prior to Target Publication Date	5 <small>A value of zero indicates the Submission due date feature is not being used.</small>

*** Invited Submission Manuscript Number Format:**
 Prefix: Pibb-Study-2016-
 Starting Number: 01
 Minimum Number of digits in Starting Number: 2

NOTE: The Prefix must be unique for each Proposal to ensure that no duplicate Invited Submission Manuscript Numbers are generated.

NOTE: The Prefix entered during Proposal initiation cannot match the custom Prefix entered on the 'Set Manuscript Number Format' page in *PolicyManager*.

NOTE: Only the Invited Submissions generated from the Proposal are affected by this new option. The Proposal Number itself will use the Manuscript Number format determined on the 'Set Manuscript Number Format' page in *PolicyManager*.

The manuscript number for an invited submission will be assigned either at Author Submission or when an Editor is Assigned, depending on the radio button selection on the Set Manuscript Number Format page in PolicyManager.

- Manually Assign Manuscript Number
 - With “Use format configured on ‘Set Manuscript Number Format’ page” configured for the Proposal Article Type
 - Editors are required to enter a Manuscript Number by using the ‘Assign Manuscript’ action link when the Invited Submission is received by the publication.
 - With “Use Prefix + Incrementing Number entered on the ‘Initiate Proposal’ page” configured for the Article Type
 - The Manuscript Number is automatically assigned to the Invited Submission when it is received by the publication. The Manuscript Number is built by combining the Prefix entered during Proposal Initiation and the next available incremented number.
- Automatically Assign Manuscript Number at Author Submission
 - With “Use format configured on ‘Set Manuscript Number Format’ page” configured for the Proposal Article Type
 - The Manuscript Number is automatically assigned using the criteria on the ‘Set Manuscript Number Format’ page in *PolicyManager* when the publication receives the Invited Submission.
 - With “Use Prefix + Incrementing Number entered on the ‘Initiate Proposal’ page” configured for the Article Type
 - The Manuscript Number is automatically assigned to the Invited Submission when it is received by the publication. The Manuscript Number is built by combining the Prefix entered during Proposal Initiation and the next available incremented number.
- Automatically Assign Manuscript Number When an Editor is Assigned
 - With “Use format configured on ‘Set Manuscript Number Format’ page” configured for the Proposal Article Type
 - The Manuscript Number is automatically assigned using the criteria on the ‘Set Manuscript Number Format’ page in *PolicyManager* when an Editor is assigned to the Invited Submission.
 - With “Use Prefix + Incrementing Number entered on the ‘Initiate Proposal’ page” configured for the Article Type
 - The Manuscript Number is automatically assigned to the Invited Submission when an Editor has been assigned. The Manuscript Number is built by combining the Prefix entered during Proposal Initiation and the next available incremented number.

NOTE: Invited Submissions originating from the ‘Solicit Commentary’ feature will use the manuscript number settings configured on the ‘Edit Manuscript Number Format’ page in *PolicyManager*, since its “parent” submission is not a Proposal Article Type.

TO CONFIGURE:

Go to ‘Edit Article Types’ in *PolicyManager* and add or edit an existing Proposal Article Type, and select an option under the new “Invited Submission Manuscript Number Format” section of the page

Sample Edit Article Type page for a Proposal

Edit Article Type

Article Type:

Maximum article Type name is 75 characters.
Warning: changing the article Type name will apply the name change to all submissions of this type, including previously submitted manuscripts/submissions.

Family: Proposal Editor Use Only: ☐

Assign to Schedule Group: ☒ Required

☐ Hide When you Hide an Article Type, the Article Type will be deactivated (not available for new manuscripts).

Custom Metadata ID:

Page Partially Omitted

Author Invitation Parameters:

Contributor Roles:

Target Publication Date:

Number of Days Author has to Respond to Invitation:

Author Submission Date (Select a Date Calculation Method):
☒ Number of days prior to Submission Target Publication Date:
☐ Number of days after Author has accepted invitation

Invited Submissions

Invited Submission Manuscript Number Format:
☐ Use format configured on 'Set Manuscript Number Format' page
☒ Use Prefix + Incrementing Number entered on the 'Initiate Proposal' page

Automatically Un-Invite Authors: ☒

Automatically Remake Alternate Authors: ☒

Allow Editor to override submission title values:
☐ Proceed with the user's selected journal and volume
☐ Proceed with the user's selected journal and volume

Page Partially Omitted

Cancel Submit

Upon upgrade to 13.1, the ‘Invited Submission Manuscript Number Format’ is set to “Use format configured on ‘Set Manuscript Number Format’ page. To enable separate Manuscript Numbering for the Invited Submissions of Proposals, select the “Use Prefix + Incrementing Number entered on the ‘Initiate Proposal’ page” radio button.

Upon initiation of a Proposal that uses this an Article Type configured with the “Use Prefix...” setting, the Proposal creator will be required to enter values for the Prefix, Starting Number, and Minimum Number of digits in Starting Number (similar to “Set Journal Auto-Increment Manuscript Number Format” on the ‘Set Manuscript Number Format’ page in *PolicyManager*).

Since the new “Use Prefix + Incrementing Number entered on the ‘Initiate Proposal’ page” for Proposal Article Types uses the publication’s Manuscript Number Assignment Method

configured on the ‘Set Manuscript Number Format’ page, it may be useful to consult the current settings on your publication by clicking ‘Set Manuscript Number Type’ in *PolicyManager*.

Search Submission Criteria Additions

New in EM/PM version 13.1, the following criteria are added to 'Search Submissions':

1. Technical Check Complete Date (Current Revision), when configured
2. Editor Decision Term (Latest)
3. Handling Editor Role
4. Assigned Editor Role
5. First Receipt Date

Search submissions selection criteria

☒ Display search results in PowerGrid

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#)

Search Definition: Choose Saved Search

Remove Search Definition
Edit Selected Search Definition
Run Selected Search Definition

[Help with Searching](#)

Help with Searching

- Use the Val
- The require
- You must e
- If you comb
- If you comb
- Selections
- You can ch

(Criterion	Is/Is not	Selector	Value)
<input type="checkbox"/>	Manuscript Number	is	Contains		<input type="checkbox"/>
<input type="checkbox"/>	DOI				
<input type="checkbox"/>	Corresponding Author First Name				
<input type="checkbox"/>	Corresponding Author Last Name				
<input type="checkbox"/>	Article Title				
<input type="checkbox"/>	Short Title				
<input type="checkbox"/>	Article Type Name				
<input type="checkbox"/>	Section/Category Name				
<input type="checkbox"/>	Revision Number				
<input type="checkbox"/>	Keyword				
<input type="checkbox"/>	Classification Description				
<input type="checkbox"/>	Manuscript Notes				
<input type="checkbox"/>	Production Notes				
<input type="checkbox"/>	Editorial Status				
<input type="checkbox"/>	Editorial Status Date				
<input type="checkbox"/>	Editorial Decision Term (Latest)				
<input type="checkbox"/>	Initial Date Submitted				
<input type="checkbox"/>	First Receipt Date				
<input type="checkbox"/>	Technical Check Complete Date (Current Revision)				
<input type="checkbox"/>	Final Decision Date				
<input type="checkbox"/>	First Author First Name				
<input type="checkbox"/>	First Author Last Name				
<input type="checkbox"/>	Any Author First Name				
<input type="checkbox"/>	Any Author Last Name				
<input type="checkbox"/>	Reviewer First Name				
<input type="checkbox"/>	Reviewer Last Name				
<input type="checkbox"/>	Handling Editor First Name				
<input type="checkbox"/>	Handling Editor Last Name				
<input type="checkbox"/>	Handling Editor Role				
<input type="checkbox"/>	Assigned Editor First Name				
<input type="checkbox"/>	Assigned Editor Last Name				
<input type="checkbox"/>	Assigned Editor Role				
<input type="checkbox"/>	Final Disposition Term				
<input type="checkbox"/>	Invitation Notes to Author				
<input type="checkbox"/>	Enter Stuff Here				
<input type="checkbox"/>	Linked ID				
<input type="checkbox"/>	Fabulous AMD				
<input type="checkbox"/>	Special stuff				
<input type="checkbox"/>	かめぐる				
<input type="checkbox"/>	Import: Base Price of Manuscript				
<input type="checkbox"/>	Import: Discount Institution				
<input type="checkbox"/>	Import: Author Accepted Price				
<input type="checkbox"/>	Import: Waiver Text				
<input type="checkbox"/>	Import: Direct Institution Billing				
<input type="checkbox"/>	Import: Terse Note				

Clear Search

[Value Options](#)

[Advanced Criteria](#)

you can copy and paste Values from there.

entered in this format, you will be required to re-enter the date in the specified format.

ke a search. We recommend entering as much criteria as you know. The more refined the

the evaluations are carried out in the right order. If you do not use parentheses, or

evaluated first.

ed" Selector.

[Editorial Menu](#)

[Production Tasks Menu](#)

[Production Status Grid](#)

TO CONFIGURE:

No additional configuration necessary to access to Search Criteria.

Bibliometric Intelligence Analysis

In EM version 13.0, there are several integrated solutions that help Editors manage assignments: CrossCheck/iThenticate, Duplicate Submission Checking, Reviewer Discovery, etc. As the volume of submissions increases, so does an Editor's To-Do List.

In EM version 13.1, Meta^a's Bibliometric Intelligence tool is integrated with Editorial Manager to help Editors better identify which submissions may be the best "fit" for the publication. Bibliometric Intelligence aims to predict the "Eigenfactor" of a manuscript over a 3-year time period by giving it an "Article Trajectory" score from 1 to 1000. Additionally, a second algorithm will produce a "Publication Match" score (in %), identifying how closely the submission matches papers already published by the journal. A report PDF is also produced, containing a detailed analysis of the results. This information allows Editors to triage the handling of papers based on their predicted success and compatibility with the publication. For more information about Meta^a's Bibliometric Intelligence tool, please refer to the following document: http://meta.com/assets/downloads/Pub_Bibliometric.pdf

EM can be configured to transfer the Author/Editor PDF directly to Meta^a's Bibliometric Intelligence tool through an API. This requires a valid account with Meta^a, which must be set up in advance to receive files. Once configured, Editors and Publisher Roles can be given permission to send the Author/Editor PDF to Meta^a from EM. The Author/Editor PDF can be sent from a submission's 'File Inventory' page, or an Editor carrying out a technical check can send the Author/Editor PDF from the 'Technical Check' page. Once the PDF has been deposited with Meta^a, EM will automatically check back for the completed report, and will display the scores and a link to download the report PDF.

Publications may also configure individual Article Types to carry out an automated deposit of the Author/Editor PDF with Meta^a at key points in the peer review process. The available trigger points are:

- When Transfer Complete link is clicked
 - When a New Submission is Received
 - On Tech Check Complete
 - At First Editor Assignment
- OR
- On First Revision

This allows publications to identify key submission types that will always be run through Bibliometric Intelligence Analysis.

Submissions where the Author/Editor PDF has been sent to Meta^a for analysis will display a 'Bibliometric Intelligence Results' Action Link in some folders; on a custom Details page (if configured); and in Search Submission results. Clicking the link will download the report PDF (if available). All Roles (Author, Reviewer, Editor and Publisher) can be configured to view this link. Next to the link, users may see:

- An ellipsis “(...)” – displays if the Author/Editor PDF for the submission has been sent to Meta^a and results have not yet been returned.
- A bold uppercase letter X “(X)” - displays if the Author/Editor PDF for the submission has been sent to Meta^a but an error has occurred, or the process has timed out. In this case, Editor or Publisher users with permission can resend the Author/Editor PDF.
- Article Trajectory Score/Publication Match Score e.g. (87/56%) – displays if the Meta^a tool has returned results. The scores are separated by a forward slash. These scores can be color-coded by setting threshold values in PolicyManager. Hovering over the scores will display explanatory text.

NOTE: although all four Roles (Author, Reviewer, Editor and Publisher) can be configured to view the results, only Editor and Publisher Roles can be configured to send the Author/Editor PDF directly to the Meta^a tool.

New Submissions - Mary François Smith, PhD

Contents: These are the new submissions that require a Technical Check. Use the up/down arrows to change the sort order.

Page: 1 of 4 (32 total submissions) 1 2 3 4 >> >|

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name
View Submission Bibliometric Intelligence Results (87/56%) Duplicate Submission Check (70%) Details Initiate Discussion History Technical Check View Reference Checking Results File Inventory Edit Submission Send Back to Author Classifications Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions Corresponding Author ORCID Search		Original Research		Test submission - very original research	Mary François Smith, PhD

TO CONFIGURE:

- In PolicyManager, go to the page 'Configure Bibliometric Intelligence'. Set any color-coding that is desired. By default all scores will be in black text, so this configuration is optional.



Configure Bibliometric Intelligence

You must already have a relationship with the Bibliometrics Intelligence provider.



Set threshold values and colors to highlight Bibliometric Intelligence scores that fall below or exceed threshold values.

After configuring these settings, additional configuration is found under each article type for trigger points to perform automatic analysis of the submission.

Highlight Article Trajectory Scores that are:

<input checked="" type="checkbox"/> less than or equal to:	25	
<input checked="" type="checkbox"/> greater than or equal to:	75	

Highlight Publication Match Scores that are:

<input checked="" type="checkbox"/> less than or equal to:	25 %	
<input checked="" type="checkbox"/> greater than or equal to:	75 %	

- If you would like to trigger Bibliometric Intelligence Analysis automatically, in PolicyManager, go to Edit Article Types, and click Edit next to an existing Article Type name (or click the 'Add' button to add a new Article Type). Select the desired trigger points to automatically send the Author/Editor PDF to the Meta^a Bibliometric Intelligence tool.

Edit Article Type

[intervening parameters not displayed.]

Similarity Checks	<input type="checkbox"/> Send Reviewer PDF on Initial Submission <input type="checkbox"/> Send Reviewer PDF on First Revision <input type="checkbox"/> Send Reviewer PDF on Final Disposition to Accept	You must also set up Automatic Transfer to a checking service on the Configure Similarity Check page. Editor and Publisher roles can be configured to send files by Automatic Transfer from the File Inventory or Technical Check pages even if you do not enable the options on this page.
Bibliometric Intelligence Analysis	<input type="checkbox"/> Send Author/Editor PDF when Transfer Complete link is clicked <input type="checkbox"/> Send Author/Editor PDF when New Submission Received <input type="checkbox"/> Send Author/Editor PDF on Tech Check Complete <input type="checkbox"/> Send Author/Editor PDF at First Editor Assignment OR <input type="checkbox"/> Send Author/Editor PDF on First Revision	Select one or more trigger points to automatically send the Author/Editor PDF to the Bibliometric Intelligence analysis tool. Editor roles can be configured to send the PDF from the Technical Check page even if you do not enable the options on this page. Editor and Publisher roles can be configured to send the PDF from the File Inventory page even if you do not enable the options on this page.

- To add the 'Bibliometric Intelligence Results' link to a custom Details page: in PolicyManager, go to 'Define Details Page Layouts', then click 'Edit' next to an existing layout name or 'Add New Layout' to create a new layout, then click the 'Select Items to Display' link. Once on the 'Select Items to Display' page, select the checkbox 'Bibliometric Intelligence Results' in the 'Links' section of the page, and proceed with saving the layout.

Select Items to Display for All fields

Select the information to appear on the Details page

* Items marked with an asterisk are subject to additional permissions, which may mean that some users will not be able to view them until you give them the additional permission to do so in RoleManager.

[Expand All](#) [Collapse All](#)

Links

- ☐ Blinded Editors *
- ☐ Technical Check *
- ☐ Additional Manuscript Details *
- ☐ Similarity Check *
- ☐ checkCIF Results *
- ☐ Duplicate Submission Check *
- ☐ Select Submissions Flags *
- ☐ File Inventory *
- ☐ Publish Information
- ☐ Transmittal Form *
- ☐ Discussion Forum *
- ☐ Reference Checking Results *
- ☐ Attachments *
- ☐ Author Questionnaire Summary (Responses for all Authors)
- ☐ Transferred Information
- ☐ Transferred Decision Letter
- ☐ **Bibliometric Intelligence Results ***

- To give Editor/Publisher Roles permission to view the Bibliometric Intelligence Results, go to RoleManager and select the checkbox 'View Bibliometric Intelligence Results'. To additionally give the Editor/Publisher Role permission to send (or resend) the Author/Editor PDF to the Meta^a tool by clicking a button on the File Inventory or Technical Check pages, select the checkbox 'Initiate Bibliometric Intelligence Analysis'.

Edit Role Definition

Role Name: Managing Editor

Check the functions that this role is permitted to perform.

☐ Search All Manuscripts
☐ Search Only Assigned Manuscripts
☐ Share Saved Searches
☐ View Linked Submission Groups

☐ Create/Edit Linked Submission Groups

☐ Set Active/Inactive Status on Linked Submission Groups
☐ Enable Review Sharing for Linked Submission Groups

☐ View COS Scholar Universe Author Profiles
☐ Search Similar Articles in MEDLINE
☐ Search Author Publications in MEDLINE
☐ Initiate Similarity Check
☐ View Similarity Check Results
☐ View Duplicate Submission Check Results
☐ Initiate checkCIF
☐ View checkCIF Results

☐ Initiate Bibliometric Intelligence Analysis
☐ View Bibliometric Intelligence Results

☐ View Publication Charges Status

- To give Author or Reviewer Roles permission to view the Bibliometric Intelligence Results, go to RoleManager and select the checkbox 'View Bibliometric Intelligence Results'.
- NOTE: 'Initiate Bibliometric Intelligence Analysis' permission is not available for Authors or Reviewers.

Edit Role Definition

Role Name: Author

Check the functions that this role is permitted to perform.

- ☐ View Status Date
- ☐ View Current Status
- ☐ View Other Author Status
 - ☐ Manage Other Authors
 - ☐ Edit Other Author E-mail Address
- ☐ Allow Access to Reviewer Names and Reviews:
 - ☐ After Final Decision of Accept, Reject or Reject and Transfer
 - ☐ After First Decision
- ☐ Send Ad Hoc E-mail
- ☐ View Author Related Correspondence History
- ☐ View Similarity Check Results
- ☐ View checkCIF Results
- ☐ **View Bibliometric Intelligence Results**
- ☐ Search Similar Articles in MEDLINE

Production Tracking Enhancements

Preprint DOIs

In version 13.0, publications can manually assign a DOI to a manuscript (submission) or they can configure the system to automatically assign them. The DOI assigned to a manuscript identifies the “version of record” (or final published version) of that manuscript, and acts as a persistent link to its location on the Internet once the manuscript is published and available electronically. Recently, many organizations have begun to post “preprint” versions of manuscripts online; these are working versions of papers that have not been “refereed” or “reviewed” yet.

In version 13.1, a publication that wants to post a preprint version of a submission can configure the system to automatically assign a “Preprint DOI” to the submission, which is completely independent of the DOI that may be assigned for the final published version of the submission. A Preprint DOI is assigned by means of a submission production task, so, therefore, a publication must be using the Production Tracking feature. A submission production task can be used to transmit the submission to a preprint server. If a JATS transmittal method is used, the Preprint DOI (if one is assigned) is written to the XML file and transmitted. For this first implementation of Preprint DOIs, a Preprint DOI cannot be edited manually, nor imported into the system.

The Preprint DOI, if assigned to a submission, is included in submission transfers, both for transfers to other EM sites and to non-EM sites.

Although the Preprint DOI can be configured to display on the Transmittal Form page, it is not added to any existing editorial transmittal methods for sending the final version of a submission to an external production system to be published.

The Preprint DOI can be configured to display on the following pages in EM:

1. A Custom Details page
2. The Transmittal Form
3. Publish Information
4. Production Status Grid

A new merge field **%PREPRINT_DOI%** pulls the Preprint DOI, if one exists, into a letter associated with a submission. If the Preprint DOI field is added to the *Transmittal Form*, the Preprint DOI is also pulled into a letter by the existing merge field **%TRANSMITTAL_FORM%**.

The new Preprint DOI is available in the Reporting interface:

1. General Data Export in the Document Table
2. Custom Report and EAR views:
 - a. Authors & Personal Identifiers View
 - b. Book Submission Production View
 - c. Manuscript Status History View
 - d. Production Task Questionnaire View
 - e. Schedule Groups Table of Contents and Headers View

- f. Submission Production Tasks View
 - g. Submission Production View
 - h. Submissions & All Authors Questionnaires View
 - i. Submissions & Author Questionnaires View
3. Cross-Publication EAR views:
- a. Cross-Publication Book Submission Production View
 - b. Cross-Publication Manuscript Status History View
 - c. Cross-Publication Production Task Questionnaire View
 - d. Cross-Publication Schedule Groups Table of Contents and Headers View
 - e. Cross-Publication Schedule Groups TOC and Additional Manuscript Details View
 - f. Cross-Publication Submission Production Tasks and AMDs View
 - g. Cross-Publication Submission Production Tasks View
 - h. Cross-Publication Submission Production View
 - i. Cross-Publication Submissions & Author Questionnaires View

TO CONFIGURE:

1. The publication must have Production Tracking enabled. Contact your Aries Account Coordinator.
2. The Aries Account Coordinator must also configure the automatic assignment of Preprint DOIs and select the publication's desired format for the Preprint DOIs.
 - a. A publication may want to include the word "preprint" in their DOI format to distinguish it from the DOIs for final published versions.
3. A publication System Administrator must edit the desired submission production task configurations to assign a Preprint DOI.
 - a. (To configure a submission production task, go to PolicyManager>*Configure Submission Workflows and Production Tasks* to access the *Add/Edit Submission Production Task* page.)

Add Submission Production Task

Part of page omitted

Letter Options

The Letters available for this feature are those assigned to the 'Production' letter family. The letters may be customized prior to being sent. Batch Assignment Letters are only used by Task Types configured with 'Allow Batch Assignment', and only when the task is selected for Batch Assignment; when such a task is assigned as a single task, manually or automatically, the configured non-Batch Assignment Letter is used.

☐ Allow Task Assignment without Sending Letter

Non-Batch Assignment Letter:

Batch Assignment Letter:

Cancel Assignment Letter:

Submit Task Letter:

Preprint DOI Options

If 'Assign Preprint DOI' is enabled, when this task is assigned, the system will automatically generate and assign a Preprint DOI to the submission if it does not already have one.

☐ Assign Preprint DOI

If a submission has a Preprint DOI, the value will be transmitted with the task assignment if the Submission Production Task Transmittal Method selected in the FTP Options section above is based on JATS.

4. A publication System Administrator must edit the desired submission production task configurations to use a JATS submission production task transmittal method:
 - i. JATS 1.0A Production Task Export
 - ii. JATS 1.1A Production Task Export
 - iii. JATS 1.1A V2 Production Task Export

FTP Options

Submission Production Task Transmittal Method:

FTP Server address
(e.g. ftp.ariessys.com):

Username

Password

None
None
General Submission Production Task Export
Aries Export
NIHMS-PubMed Central Deposit
NLM Production Task Export
NLM 3.0 Production Task Export
NLM 3.0 DTD v2 Export
Highwire PAP Export
JATS 1.0A Production Task Export
JATS 1.1A Production Task Export
JATS 1.1A V2 Production Task Export

Assignment Files

5. The publication does not need to configure the system to transmit Preprint DOIs; if a submission production task is assigned, and the task transmittal method is based on one of the JATS methods, and the submission has a Preprint DOI, it will be written to the XML output file that is transmitted to the task assignee (which could be a preprint server).
6. Note that a publication using the new Preprint DOI functionality may prefer to initiate production early in the editorial workflow, so that the Preprint DOI can be assigned early on and the submission transmitted to a preprint server before the publication is ready to publish the final version (VOR) of the submission.
7. Production vendors that receive submission production task assignments via a JATS transmittal method must be informed about the change to the XML output file, which may now also include the new JATS element that holds the Preprint DOI:
 - a. New element: <related-article related-article-type="preprint">*[Preprint DOI goes here]*</related-article>

Reporting Enhancements

Suppress Standard EAR Reports

In EM/PM version 13.0, publications using Enterprise Analytics Reporting (EAR) and/or Cross-Publication Enterprise Analytics Reporting have access to pre-made reports. When the EAR Main Menu is accessed, the prefabricated reports can be found in the “Standard Reports” section of the page. These reports do not require additional configuration from users but they may not be relevant to a publication’s needs.

Sample EAR main menu for publication with Production Tracking Enabled and Standard Reports displayed

Enterprise Analytics Reporting

[Create Report](#)

[Get more help](#) about database tables and their contents

[Get more help](#) about Views and their contents

Shared Reports



Kristin

[Colors and Pies](#)

[Created Report](#)

[Multiple Entries](#)

Standard Reports



Editorial Reports

[Accept and Reject Decisions by Editor in selected timeframe](#)

[Accept and Reject Decisions in selected timeframe](#)

[Average Days to Decision by Editor](#)

[Completed Reviews Detail Report](#)

[Editor Submission Counts - All editors by Role](#)

[Editor Submission Counts - Editors at End of Chain](#)

[People and Classifications](#)

[People and Institutions](#)

[People Detail Sheet Subreport](#)

[People List Subreport](#)

[Reviewer Thank-You List](#)

[Status of Submissions Received in selected timeframe](#)

[Submission Turnaround Times - Editorial](#)

[Submissions Accepted - by Country and Year](#)

[Submissions Received - by Article Type and Year](#)

[Submissions Received - by Country and Year](#)

[Submissions Received - by Month and Year](#)



Production Tracking Reports

[Avg Days to Complete Production Tasks in selected timeframe](#)

[Submission Turnaround Times - Editorial and Production](#)

[Submission Turnaround Times - Production](#)

New in EM/PM version 13.1, System Administrators may hide the “Standard Reports” section of EAR and Cross-Publication EAR altogether. This is done through a new page in *AdminManager*: “Configure Enterprise Analytics Reporting Menus”.

TO CONFIGURE:

To hide the 'Standard Reports' section of the EAR and Cross-Publication EAR Main Menus, go to *AdminManager*>"Configure Enterprise Analytics Reporting Menus":



On the 'Configure Enterprise Analytics Reporting Menus' page, de-select the "Display all standard Enterprise Analytics reports for all Editor Roles" option (screenshot below).



