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Editorial Manager®/ProduXion Manager®
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em **Restrict Ability to Edit Review Settings by Editor Role** *on page 1*	This enhancement enables publications to limit the ability to edit review settings by Editor role. These settings include the number of required reviews and the time threshold for cancelling Reviewer invitations and assignments.
em **Direct-to-Editor Enhancement for Automatic Assignment** *on page 2*	This enhancement to the Direct-to-Editor (Autonomous Editor) feature enables publications to direct and automatically assign submissions. Recipient Editors are no longer required to assign submissions to themselves.
em **Reviewer Consultation Enhancement** *on page 4*	This enhancement enables publications to configure the Reviewer Consultation feature (discussion forums for Reviewers) to identify Reviewer participants by name and reviewer number or by reviewer number only.
em pm **Email Bounce Notification Enhancement** *on page 5*	Bounce notification subject lines are enhanced to include publication code, bounce type, and bounce subtype.
em **Inclusionary Data Collection Instructional Text Update** *on page 6*	This minor enhancement changes the instructional text displayed to users accessing the Inclusionary Data Collection questions.
	Information on current integrations: *Manuscript analysis services* *Repositories*

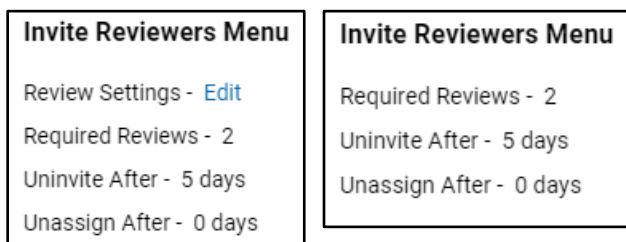# Restrict Ability to Edit Review Settings by Editor Role

User role impact: EDITOR

This enhancement introduces a RoleManager permission to govern the display of the link that enables Editors to edit the number of required reviews and the threshold to cancel Reviewer assignments and invitations. Previously, this link was available to all Editors with access to the Invite Reviewers Menu.

Editors with permission to invite Reviewers see the Invite Reviewers Menu in the left sidebar of the Reviewer Selection Summary page. Enabling the new permission will display the link to edit review settings.

At release, this permission will be enabled for all existing Editor roles.

Detail of Reviewer Selection Summary page, left sidebar: The option to edit review settings is displayed based on a new RoleManager permission. The image on the left shows the Edit link that appears when the permission is enabled.

Invite Reviewers Menu	Invite Reviewers Menu
Review Settings - Edit	Required Reviews - 2
Required Reviews - 2	Uninvite After - 5 days
Uninvite After - 5 days	Unassign After - 0 days
Unassign After - 0 days	

TO CONFIGURE:

Go to **RoleManager** > Editor Roles and select the applicable roles. The new permission appears in the Reviewer Invitations section:

- Edit Review Settings: Check this box to display the Edit link. Leave the box unchecked to suppress the link.

Direct-to-Editor Enhancement for Automatic Assignment

User role impact: EDITOR

The Direct-to-Editor (Autonomous Editor) feature allows publications to push submissions to an individual Editor, bypassing the New Submissions Requiring Assignment folder and going to the Direct-to-Editor New Submissions folder. This feature is useful both for smaller publications that do not have a central editorial office and for larger publications that have a large pool of Editors.

This enhancement provides publications the option to assign direct-to-editor submissions automatically to the specified Editor, instead of requiring Editors to assign themselves when they first access a submission. (The workflow proceeds as though the Editor accessed the submission in the Direct-to-Editor New Submissions folder and clicked the Assign to Myself action link.) The submission moves to the New Assignments folder.

Detail of Set Editor Assignment Options page in PolicyManager: New checkbox settings enable automatic assignment of Direct-to-Editor submissions. (Green arrows indicate the new settings.)

TO CONFIGURE:

Go to **PolicyManager** > Editor Assignment Policies > Set Editor Assignment Options.

The page includes configurations for two Direct-to-Editor workflow options. A checkbox to enable automatic assignment is added to each option. The text for both settings is the same: Direct-to-Editor submissions are automatically assigned to the Editor (New Assignments folder).

Option one applies to submissions for which the Author has selected an Editor or a Section/Category. The new checkbox appears below the checkbox and radio buttons for configuring this option.

Option two applies to assigning Editors by rotation. The new checkbox appears below the radio button for configuring this option.

Recommendation: If enabling automatic assignment, system administrators should review RoleManager permissions for Editor roles involved in handling Direct-to-Editor submissions.

For receiving assignments, these permissions are required:

- Receive Assignments in "New Assignments" Folder
  - Receive Assignments without Invitation: This permission and sub-permission together allow the system and user to skip the step of sending and accepting an invitation to handle a submission. When the user is identified as recipient of a direct-to-editor submission, the submission appears in a Direct-to-Editor folder.

For assigning and reassigning, these permissions are required in case an Author selects the wrong Editor or section/category during submission:

- Redirect to Other Editor (and be removed from Editor Chain): This permission allows a user to select another Editor from a Direct-to-Editor folder. This permission does not apply if the automatic assignment option is enabled, because the Direct-to-Editor folder is bypassed.
- Unassign Myself: This permission allows a user to undo a submission assignment and reassign the submission to another Editor (with Unassign Editor link in New Assignments folder).

The above permissions have direct impact when automatic assignment is enabled. Editor roles will also need an Assign Editor permission (several are available) for subordinate Editors and additional permissions as appropriate to publication workflows.

Reviewer Consultation Enhancement

User role impact: REVIEWER

The Reviewer Consultation feature allows Reviewers to take part in a discussion after they have completed their reviews. This enhancement introduces the ability to configure Reviewer consultations to preserve the anonymity of participants. Publications may choose to display Reviewer participants by reviewer number only or by name and number.

The existing Reviewer RoleManager permission, View Reviews with All Identities Visible (for Open Peer Review), is used to determine whether a Reviewer participant can see other Reviewers' names within the discussion forum.

TO CONFIGURE:

Go to **RoleManager > Reviewer Role** and select the applicable Reviewer role. Configure permissions to display Reviewer information as desired.

- View Reviews with All Identities Visible (for Open Peer Review)
    - o Do not check the box: Reviewer participants will see other Reviewers' numbers only. Names are not displayed.
    - o Check the box: Reviewer participants will see other Reviewers' names and numbers.

A second Reviewer permission should be configured to coordinate with the option selected above if Reviewer names should not be displayed. This permission governs the display of Reviewer information on the View Reviews and Comments pop-up window.

- View Comments with All Identities Visible
    - o Do not check the box: Reviewer participants will see other Reviewers' numbers only. Names are not displayed.

Email Bounce Notification Enhancement

User role impact: ALL

When an EM/PM system email is undeliverable, the recipient's email client may send a bounce response. These bounce notifications are sent to the originator of an email sent from EM/PM. The publication code acronym, bounce type description, and bounce subtype have been added to the notification subject line. This will allow recipients to filter the bounce notifications by journal and bounce type/subtype using the subject line, without having to open each individual notification.

The publication code, bounce type and subtype are also shown in the error description portion of the body of the notification.

Subject line (changes highlighted in yellow):

Undeliverable: (Journal : demo170): Bouncetype:Transient - Mailboxfull: Subject: Reviewer Invitation

Example of notification body (no changes; shown for context):

Unable to deliver email

Original Message Details:
Sender Address: mmmary@editorialmanager.com
Recipient Address: ronreviewer@ariessys.com
Subject: Reviewer Invitation
Journal: demo170
Error: Transient - MailboxFull

TO CONFIGURE:

No configuration is required.

Inclusionary Data Collection Instructional Text Update

User role impact: ALL DESIGNATED BY PUBLICATION

The Inclusionary Data Collection feature enables publications to collect self-reported gender identity, race, and ethnicity data from their users.

The instructional text that is displayed with the standard three-question Diversity, Equity, and Inclusion (DEI) survey has been changed. This change has also been made to the instructional text that displays on each question popup.

The purpose of inclusionary data collection is to gather demographic information on individuals involved in scholarly research and publishing. The original text referenced the "scientific community." However, not all publications are science related. The updated text removes the word "scientific" to make the instructions more universally applicable.

Updated text:

> We are deeply committed to fostering a community that supports and benefits from the talents of researchers from a wide range of backgrounds. Please help us collect the data we need to gauge our success at advancing diversity, inclusion and equity in research by responding to the survey.

TO CONFIGURE:

The instructional text is changed as part of the release. No additional configuration is required.