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em **User Option to Unsubscribe from Bulk Email Notifications** *on page 3*	This enhancement adds an email header to all batch emails sent from EM/PM with a link to a landing page that helps users to opt out of email communications.
em **Past Assignments Data Added to Assign Editor Page** *on page 5*	The Assign Editor page is enhanced to include the number of past assignments for each Editor in a defined time span.
em **AESR Enhancement for Use with Suggest Editor Feature** *on page 6*	Automated Editor Summary Reminders (AESRs) are enhanced with the option to draw attention to submissions requiring additional Editor invitations. This is for use with the Suggest Editor feature. It can be used to alert inviting Editors when more candidates need to be added to the Editor queue for a submission.
em **Editor Search Tool Enhanced with Section/Category** *on page 8*	This enhancement adds Section/Category Name to the search criteria in the Editor search tool.
em **Bulk File Download Option on Attach Files Page** *on page 9*	The Attach Files page in the manuscript submission process is enhanced to allow users logged in with the Author role to select multiple files for download at the same time.
em **Cross-domain Adobe Analytics Tracking for EM** *on page 10*	Adobe Analytics tracking can now capture users' routes to EM publication homepages as well as their unique user journeys within article processing charge (APC) payment systems.

em **EM Web Services and Notification Services Enhancements** *on page 11*	An EM Web Services enhancement adds two new API requests that can be used to retrieve Author information. EM Notification Services are enhanced with a new notification event, Review Assignment Completed. This enhancement also introduces the ability to configure notifications for this event to use a POST with body parameters.
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![em Editorial Manager®]

User Option to Unsubscribe from Bulk Emails

User role impact: ALL

Mailbox providers Google and Yahoo! have introduced requirements related to marketing material sent by bulk email senders. EM (editorialmanager.com) is expected to be classified as a bulk email sender due to the number of emails it sends in a single day. Most emails sent from EM/PM publication sites can be considered transactional (for example, reminders for an open assignment or unanswered invitation). However, some publications may use batch email for unsolicited emails that could be considered marketing communications (for example, a call for papers or a conference announcement).

In order to comply with the new requirements, all batch emails sent from EM/PM are enhanced to include an email header that allows mail clients to display an option to unsubscribe to the recipient.

The Unsubscribe link directs users to a landing page. The page identifies the publication site and instructs users to contact the publication to complete their unsubscribe request. The page displays a Contact Us link. Additional links enable users to view the Aries privacy policy and the data use privacy policy of the publication or its publisher.

Sample landing page
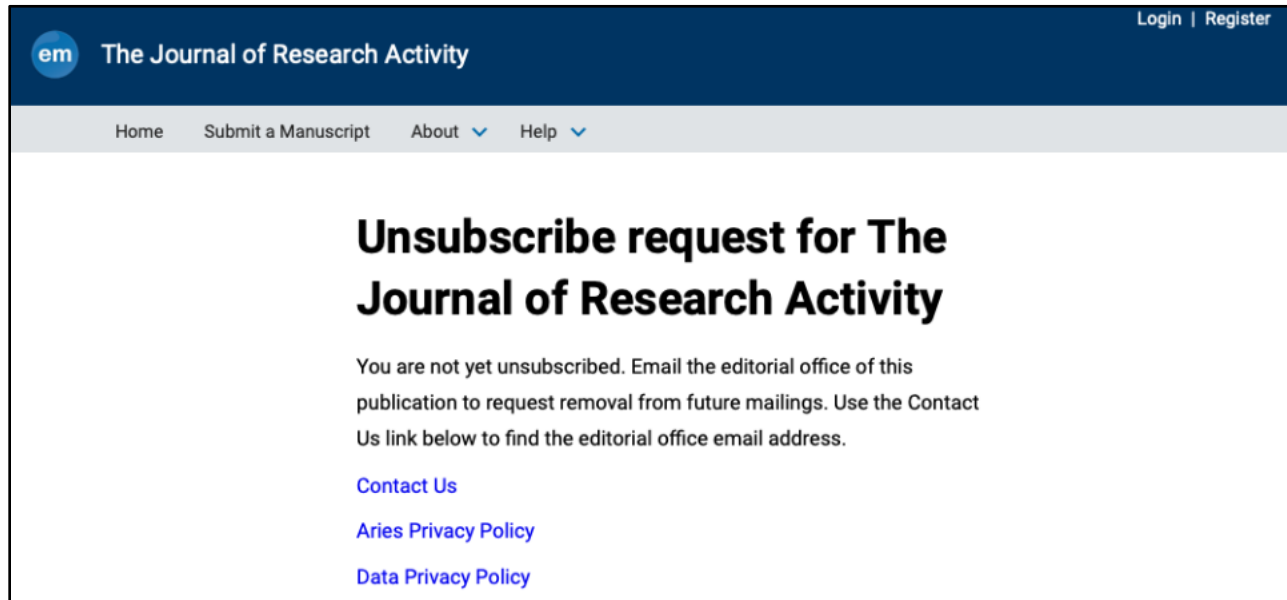
Once requests are received, an administrator will be required to modify the user's account to exclude the user from future batch emails.

Administrators can use existing settings on the Search People – Update Information page to exclude users from several types of communications, depending on the request made in the email from the user.

- Exclude this user from receiving all batch and reminder emails: Check this box and select Always. (if the user has asked not to receive batch email communications and/or reminders).
- Forbidden as a Reviewer?: Select Yes (if the user has asked not to receive invitations to review).
- Inactivate this User: Use this button and confirm action to make the user record inactive (if the user has asked to opt out of all future emails and close their user account).
- Anonymize this User: Use this button and confirm action to remove the user's personal information from the publication database (if the user has asked to opt out of all future emails, close their user account, and remove their personal data).

TO CONFIGURE:

No configuration is required to activate the email header.

The Contact Us link destination is the same one configured for the Contact link in the main navigation. It is defined on **PolicyManager** > Edit Banner URLs. The link may be configured as a URL (to a page with the publication's contact information) or a mailto: link.

Editor roles of staff who will fulfill the user opt-out requests need existing **RoleManager** permissions:

- Search People
- Inactivate Users
- Anonymize Users

Past Assignments Data Added to Assign Editor Page

User role impact: EDITOR

A grid on the Assign Editor page provides information about the Editors listed, including classification matches (between the Editor and submission), upcoming availability, and number of current assignments. This grid is enhanced with a new column to display the number of past assignments an Editor has handled during a defined time span.

A new configuration option is added to the Set Request Editor or Assign Editor Display Options page in PolicyManager to define the time frame. The default number of days is 90.

Detail of Assign Editor page: New column, Past Assignments for the last X days, is added to Editor grid. A system administrator can define the number of days used in the calculation.

Select ▲▼	Editor Role ▲▼	Editor Name ▲▼	Current Assignments ▲▼	# Classification Matches ▲▼	Classification Matches	Available during next 30 days	Past Assignments for the last 30 days ▲▼
○	Editor	Emily Editor ⚐	0	0		Yes	2
○	Editor	E.E. Editman ⚐	1	0		Yes	0
○	Editor	Ed Editor, PhD ⚐	5	0		Yes	1

TO CONFIGURE:

Go to **PolicyManager** > Submission Policies > Set Request Editor or Assign Editor Display Options.

A new textbox setting, Number of days to calculate Past Assignments, is added to this page. Enter the desired number of days to be used in the calculation. The default number is 90.

AESR Enhancement for Use with Suggest Editor Feature

User role impact: EDITOR

The Suggest Editor feature is useful for publications with a large pool of Editors. It can be used to narrow down the field of Editor candidates to make selection more efficient. When this feature is enabled, the system generates a list of suggested candidates based on classification matches between the candidate and the submission. The assigning Editor selects candidates from the list to and sets the order in which to invite them. The system automatically invites the candidates in the defined order until one accepts the invitation to handle the submission or until all candidates in the queue have declined the invitation.

This enhancement enables Automated Editor Summary Reminder (AESR) emails to include information about submissions with an empty Editor queue. A new setting, Submissions Requiring Additional Editor Invitations, is added to the Configure Automated Summary Reminders page in PolicyManager.

The two merge fields available for use in AESR emails are enhanced as follows:
- %EDITOR_REMINDER_FOLDER_SUMMARY% is enhanced to include Submissions Requiring Additional Invitations in the list (when configured for inclusion). Clicking the linked text directs the user to the Editors Invited – None Yet Assigned folder.
- %EDITOR_REMINDER_SUBMISSION_LISTS% is enhanced to include Submissions Requiring Additional Invitations (when configured for inclusion) identified by manuscript number and title. Information also includes the number of days that the Editor queue has been empty. Author list and abstract may also be configured for inclusion.

Detail of AESR email (HTML version): Content of %EDITOR_REMINDER_SUBMISSION_LISTS% merge field can include Submissions Requiring Additional Editor Invitations. Number of days without Editor Invitation is included for each submission (vertical green box in this image for emphasis).

Submissions Requiring Additional Editor Invitations (3)	
Submission	**Days without Editor Invitations**
AmyDev170-22-085 **Title:** Checking Author **Authors:** Amy R. Author, MBA	9
AmyDev170-24-026 **Title:** Webber Local Descriptor Based Feature Extraction **Authors:** Colorado Avalanche, MD	15
AmyDev170-24-029 **Title:** Extract Paper ONE **Authors:** Red Phantom, PhD, MD	9

Submissions Requiring Additional Editor Invitations is not an Editor Main Menu folder. Submissions are included in the Submissions Requiring Additional Editor Invitations section of AESR emails when the Editor queue associated with the submission is empty. Submissions Requiring Additional Editor Invitations can be color-coded in AESR emails, but the color-coding will not apply to the Editor Main Menu.

TO CONFIGURE:

Go to **PolicyManager** > Editor Assignment Policies > Configure Automated Summary Reminders.

Submissions Requiring Additional Suggested Editors is added to the list of folders that can be included in AESR emails. (Clicking this link in an AESR will direct users to the Editors Invited – None Yet Assigned folder.)

Go to **PolicyManager** > General Policies > Configure Warning Thresholds.

This enhancement allows for defining thresholds for Needs Attention and Late definitions related to Submissions Requiring Additional Editor Invitations in AESR emails.

Detail of Configure Automated Editor Summary Reminders page in PolicyManager. New option, indicated with green arrow, is added to the bottom of the list.

Detail of Configure Warning Thresholds page in PolicyManager. New option, indicated with green arrow, is added to the bottom of the list.

Editor Search Tool Enhanced with Section/Category

User role impact: EDITOR

This enhancement adds Section/Category Name to the list of criteria available when a user performs a search for an Editor. The search tool is used for multiple purposes and is available on the following pages:

- Assigning or inviting an Editor: Assign Editor page and Suggest Editor page.
- Blocking an Editor's access to a submission: Block Editor page.
- Discussion forums: Initiate Discussion page and Add Participants to Discussion page.

Detail of Editor search tool, showing the addition of Section/Category Name to the list of available search criteria.
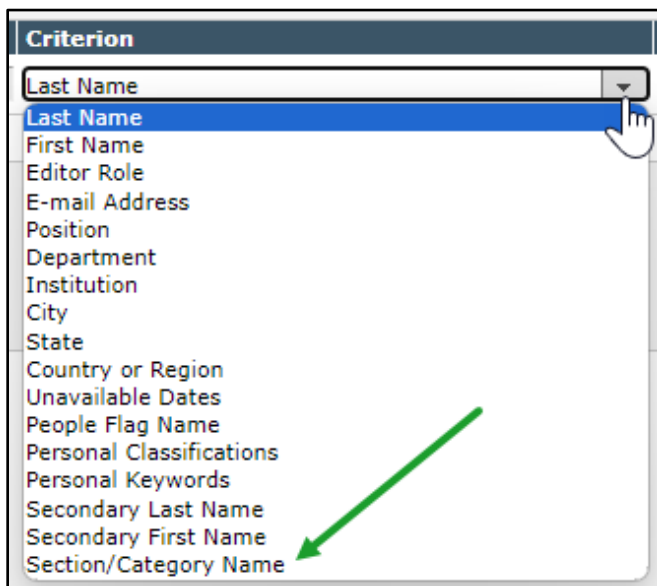
TO CONFIGURE:

No configuration is required. The new criterion is available to Editor roles with permission to access Editor search tools.

Bulk File Download Option on Attach Files Page

User role impact: AUTHOR, EDITOR

A bulk download option has been added to the Attach Files page for the Author role. This ensures that Authors encountering a submission error after uploading a large zip file can download all submission files for investigation. Editors assisting with submission errors can proxy in as the Author and use the bulk download functionality to aid in investigating submission errors.

A new button, Download Selection as Zip File, is added to the Attach Files page of the submission process. Authors can choose files, using existing selector checkboxes or the existing Check All link, and click the button to download the selected files in a zipped folder. (The Download Selections as Zip File button is not active when the page is first accessed during the submission process. The button becomes active when a user revisits the page (e.g., when checking files before approving submission) and selects files.)

Detail of the Attach Files page (in the manuscript submission process): The new button, Download Selection as Zip File, appears below the file list.

The order in which the attached items appear is the order established by this publication. You may re-order any items of the same type manually if necessary.

Change Item Type of all Choose ⌄ files to Choose ⌄ [Change Now]   Check All   Clear All

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	Abstract (MUST be submitted as a separate file) ⌄	Abstract (MUST be submitted as a	em test1.docx	12.7 KB	05/31/2024	Download	☐
2	*Disclosure ⌄	Disclosure	Test1018.docx	14.2 KB	05/31/2024	Download	☑
3	Figure ⌄	Figure	Screenshot 2023-09-14 100822.png	108.5 KB	05/31/2024	Download	☑
4	*Manuscript ⌄	Manuscript	test38307.docx	12.8 KB	05/31/2024	Download	☐

[Update File Order]   [Download Selections as Zip File]   [Remove]
                                                          Check All   Clear All

                                        [← Back]   [Proceed →]

TO CONFIGURE:

No configuration is required.

Cross-domain Adobe Analytics Tracking for EM

User role impact: NONE

This enhancement adds Adobe Analytics tracking to EM publication homepages. In addition, the Adobe Visitor ID (i.e., the Marketing Cloud ID, or MCID) has been added to the article processing charge (APC) quote URL as a query string parameter to track the unique user journey in the APC payment system.

TO CONFIGURE:

No system configuration is required.

EM Web Services and Notification Services Enhancements

User role impact: SYSTEM ADMINISTRATOR

EM Web Services enable publications to retrieve submission metadata from an EM site database using API calls.

EM Notification Services enable publication sites to deliver query string notifications to one or more predefined endpoints at select workflow events. This enables publication sites to integrate with third-party systems and use EM workflow events to trigger specific actions in these systems.

EM Web Services enhancement

This enhancement adds two new API requests that can be used to retrieve Author information across all revisions associated with a submission:

- getAllAuthorsFullByDocumentId
- getAllAuthorsFullBySubmissionId

EM Notification Services enhancements

This enhancement introduces a new notification event, Review Assignment Completed.

The enhancement also adds the ability to configure notifications for this event to use a POST call with body parameters. By default, a POST call with query string parameters is used for notifications.

A Review Assignment Completed notification configured with the new POST call option provides a secure way to include elements relevant to peer review recommendations in the body of the notification to the defined endpoint.

At this time, the new POST call option will work only with the new event, because additional content (body) is not included in other events.

TO CONFIGURE:

EM Web Services: For publications with EM Web Services already enabled, the new call will use their ClientID/Secret to get their token following the standard OAuth Protocol. Once they have obtained the token, they can then use it to call the API method directly.

 EM Web Services: Go to **AdminManager** > Configure Notification Services.

The Task Status section of the page now includes the Reviewer Recommendation Completed event. System administrators must add endpoints to be notified for the new events.

The new checkbox setting, Use Post Body, appears on the Add/Edit Endpoint pop-up window.

(The system will ignore the Use Post Body setting if the option is accidentally enabled for any event other than Review Assignment Completed.)

To enable EM Web Services or EM Notification Services or to request full documentation and instructions, contact your Aries Account Coordinator.

Reporting Enhancements

Changes to Field Names in Enterprise Analytics Reporting Tables

As part of the ongoing work to make naming clearer and more consistent in reporting tools and Database Content Help popups, the fields listed below have been renamed.

The new names will appear in the Field drop-down list in EAR reports. These names will also populate the Description text box when a user creates a new report or adds the field to an existing report. Any user-entered text in the Description text box will be retained when a user edits an existing report.

Discussion Participants table

- Old Participant People ID [DISCUSSION_PARTICIPANT.OLD_PEOPLEID]: Previously, this field was named "Old People ID."

Discussion Topic Templates table

- Template Hidden [DISCUSSION_TOPIC_TEMPLATE.HIDDEN]: Previously, this field was named "Hidden."
- Details Link on Discussion Pages [DISCUSSION_TOPIC_TEMPLATE.HIDDEN]: Previously, this field was named "Display Discussion Link in Details."

New names will appear in the Field drop-down list in EAR. New names will populate the Description text box when the field is added to a new or existing report (top image). User-entered Description text is not overwritten in existing reports.
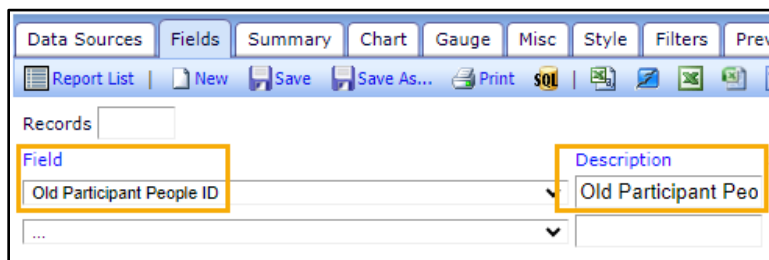
These changes also apply to General Data Export. The new field names appear in the Criterion drop-down list on the General Data Export page where a user defines the criteria for the data export. These names also appear as column headers on the results page.

TO CONFIGURE:

No configuration is necessary. Users with related reporting permissions will see the updated field names.