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Editorial Manager®/ProduXion Manager® Release Notification 24.12 (November 2024)

em pm **Registration Page Enhancement** *on page 2*	The Registration page is updated to display fewer default fields to the user at this step in the registration process.
em pm **Custom Merge Field Enhancement** *on page 3*	This enhancement adds functionality for creating custom merge fields that contain one or more system merge fields. This allows standard information, such as publication name and email address, to be included in custom merge field text for any letter. It also allows submission-specific information, such as manuscript number, to be included in custom merge fields in communications to the author.
em pm **Text and Data Mining Page Tagging** *on page 4*	Text and data mining page tagging standards have been implemented in EM to protect customers' content and data from unauthorized use, such as training AI models.
	Reporting Enhancements *on page 5*
	Information on current integrations: ***Manuscript analysis services*** ***Repositories***

Registration Page Enhancement

User role impact: ALL

The Registration page is updated to display fewer default fields. This will simplify the registration process for users.

Login Details section is unchanged. The user is required to enter a username and password.

Personal Information section is limited to the following default fields:
- Title: Displayed as optional by default; can be set as required by the publication.
- Given/First Name: Required by system; entered on the Pre-registration page and carried over.
- Middle Name: Displayed as optional by default; can be set as required by the publication.
- Family/Last Name: Required by system; entered on the Pre-registration page and carried over.
- Degree: Displayed as optional by default; can be set as required by the publication.
- Telephone Number: Displayed as optional by default; can be set as required by the publication.
- Email Address: Required by system; entered on the Pre-registration page and carried over.
- ORCID: Displayed as optional by default; can be set as required or hidden by the publication.

Institution Related Information section is limited to the following default fields:
- Position: Displayed as optional by default; can be set as required by the publication.
- Institution: Displayed as optional by default; can be set as required or hidden by the publication.
- Department: Displayed as optional by default; can be set as required or hidden by the publication.
- Street Address: Displayed as optional by default; can be set as required or hidden by the publication.
- City: Displayed as optional by default; can be set as required or hidden by the publication.
- State or Province: Displayed as optional by default; can be set as required or hidden by the publication.
- Zip or Postal Code: Displayed as optional by default; can be set as required or hidden by the publication.
- Country or Region: Required by the system.
- Available as a Reviewer: Displayed as optional by default; can be set as required by the publication. Not be displayed if automatic Reviewer role assignment is enabled (PolicyManager > Registration and Login Policies > Enable Automatic Reviewer Role Assignment For New Registrants).

Areas of Interest or Expertise section is unchanged. The section appears if the publication has selection of personal classification and/or entry of personal keywords set to required or optional.

A new message appears at the bottom of the Registration page explaining that additional information can be entered on the Update My Information page.

Additional fields not on the lists above that are set as required by the publication will also be displayed. Labels for fields required by the system and fields set as required by the publication will appear in red text followed by an asterisk to identify them as required.

The same system-required fields apply to proxy registration and expedited reviewer login.

TO CONFIGURE:

No new configuration is required. However, it is recommended that publications minimize the number of required fields in order to streamline the user registration process.

Go to **PolicyManager** > Registration and Login Policies > Edit Registration Fields.

Fields required by the system are indicated with hard-coded checkmarks. Users must confirm completion of all but two of these fields on the Registration page. Two are set by default and can be updated by users on the Update My Information page:
- Preferred Method of Contact: At registration this is set to Email.
- Address is for (Work, Home, Other): At registration this is set to Work.

Custom Merge Field Enhancement

User role impact: SYSTEM ADMINISTRATOR

Publications can define custom merge fields to pull in customized text, such as standard signatures, seasonal announcements, legal disclaimers, terms and conditions, or marketing messages.

This enhancement allows system merge fields to be included in the content defined for a custom merge field. When the custom merge field is populated in a letter, it will include all the defined custom text and the information populated by each individual system merge field that it contains. Custom merge fields containing system merge fields may be used in both plain text and HTML letter templates.

Custom merge fields can be used in letter templates for all letter families. However, any system merge fields used within a custom merge field will be populated only under their defined conditions. For example, system merge fields that do not currently populate in letters sent to cc'd and bcc'd recipients will not populate when nested in a custom merge field for those copied recipients. Similarly, a system merge field that currently populates only in letters in the Ad Hoc from Editor letter family will not populate when nested in a custom merge field used for a letter in a different family.

The Edit Custom Merge Field page in PolicyManager is enhanced to enable the insertion of a system merge field into the content of the custom merge field. An Insert System Merge Field link is added to the links that appear above the Content text box. Clicking the link opens the Insert System Merge Field popup-window that lists all system merge fields. (Behavior of this pop-up window is the same as on the Add/Edit Letter page in PolicyManager.)

Edit Custom Merge Field page in PolicyManager: A new link, Insert System Merge Field, is added to the configuration links above the Content text box.

TO CONFIGURE:

Go to **PolicyManager** > Define Custom Merge Fields. Select Add New Field or Edit Definition for an existing custom merge field. Click the Insert System Merge Field link to open the pop-up window and select one or more system merge fields to include in the custom merge field definition.

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Text and Data Mining Page Tagging

User role impact: ALL

Text and data mining (TDM) is the process of automatically deriving high-quality, machine-readable information from content. Under the updated *EU 2019 Digital Single Market Copyright Directive* academic researchers are allowed to mine subscribed content in order to advance non-commercial scientific research and innovation.

In response to constraints imposed by the EU DSM Directive, TDM page tagging standards have been implemented in EM to protect customers' content and data from unauthorized use, such as training AI models.

The standards outlined in the *TDM Reservation Protocol* cover the terms under which protected content may be used. The implementation of these standards in EM adds machine-readable indicators to protect customers' content and data from unwanted use. These indicators flag content and data stored in EM to discourage unauthorized web crawlers and commercial TDM actors from accessing our customers' content for TDM and AI training purposes.

TO CONFIGURE:

No configuration is required.

Reporting Enhancements

Changes to Table and Field Names in Enterprise Analytics Reporting

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 table name will appear in the Choose View or Table drop-down list in EAR reports. New field 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.

Substitute Items table (formerly "Substitute Item List")

- Deleted [SUBSTITUTE_ITEMS.DELETED]: Previously, this field was named "Deleted Flag."
- Substitute Item ID [SUBSTITUTE_ITEMS. SUBSTITUTE_ID]: Previously, this field was named "Unique ID."

Contributor Roles Taxonomy table

- Translation Token ID [CONTRIBUTOR_ROLES_TAXONOMY.NAME_RESOURCE_ID]: Previously, this field was named "Contributor Role Name Resource ID."

Degree of Contribution Definitions table

- Degree of Contribution Description [DEGREE_OF_CONTRIBUTION.NAME]: Previously, this field was named "Description."
- Translation Token ID [DEGREE_OF_CONTRIBUTION.NAME_RESOURCE_ID]: Previously, this field was named "Description Resource ID."
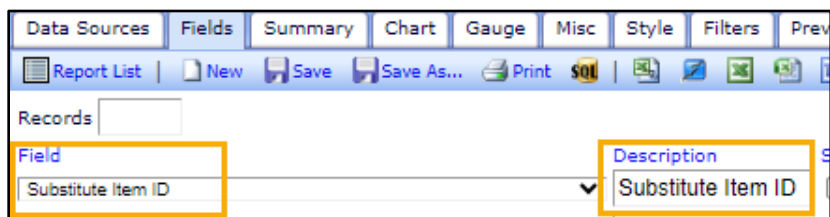
File Catalogue table

- File Catalogue Section ID [FILE_CATALOGUE.SECTION_ID]: Previously, this field was named "Section ID."
- File GUID [FILE_CATALOGUE.GUID]: Previously, this field was named "Globally Unique File Identifier."
- Compressed [FILE_CATALOGUE.COMPRESSED]: Previously, this field was named "Compression Flag."
- Missing [FILE_CATALOGUE.MISSING]: Previously, this field was named "Missing Flag."

Scheduled Task Frequency table

- Translation Token ID [SCHEDULED_TASK_FREQUENCY.SCHEDULED_TASK_FREQUENCY_RESOURCE_ID]: Previously, this field was named "Scheduled Task Type Resource ID."

New names will appear in the Field drop-down list in EAR or Cross-Publication 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 table name appears in the Choose Table drop-down list. 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 and as column headers on the results page.

TO CONFIGURE:

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

General Data Export Changes to Table and Field Names

As part of an initiative to provide consistency of naming and more accurate descriptions of data displayed, the following changes have been made. These changes apply only to General Data Export (the tables and fields do not appear in Enterprise Analytics Reporting).

Table name changes

These new table names appear in the drop-down list on the main General Data Export page where a user makes a table selection.

- COLLAPSIBLE_LIST_PREFS has been renamed "Collapsible List Preferences" (was "Collapsible List Positioning Save Location").
- FIELD_TYPES has been renamed "Custom Field Types" (was "Custom Field Type").
- CUSTOM_IMAGES has been renamed "Custom Image Files" (was "Image File List").
- FILE_CATALOGUE_SECTIONS has been renamed "File Catalogue Sections" (was "File Catalog Sections").
- FILE_PROCESSING_TYPE has been renamed "File Processing Types" (was "File Processing Type Values").
- PDF_FILES has been renamed "PDF Files" (was "PDF File List").
- PUBLISHER_ZIP_STATUS has been renamed "Publisher Zip Statuses" (was "Publisher Zip Status Types").
- ZIP_FILES has been renamed "Zip Files" (was "Zip File List").

Field name changes

These 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. New field names and associated database names are listed below.

One field in the Automated Similarity Check Triggers table has been renamed.

- Translation Token ID [SIMILARITY_SUBMISSION_TYPE.RESOURCE_ID]

One field in the Calendar Attachment Trigger Points table has been renamed.

- Translation Token ID [CALENDAR_ATTACHMENT_EVENTS.DESCRIPTION_RESOURCEID]

One field in the Collapsible List Preferences table has been renamed.

- Collapsible List Preference ID [COLLAPSIBLE_LIST_PREFS.COLLAPSIBLE_LIST_PREFS_ID]

Two fields in the Contributor Role Change History table have been renamed.

- Operator ID [CONTRIBUTOR_ROLE_ADDED_REMOVED_HIST.OPERATOR_PEOPLEID]
- Translation Token ID [CONTRIBUTOR_ROLE_ADDED_REMOVED_HIST.CONTRIBUTOR_ROLES_RESOURCE_ID]

Three fields in the Custom Field Types table have been renamed.

- Custom Field Type Name [FIELD_TYPES.DESCRIPTION]
- Custom Field Type ID [FIELD_TYPES.FIELD_TYPE_ID]
- Translation Token ID [FIELD_TYPES.RESOURCE_ID]

Two fields in the Custom Image Types table have been renamed.

- Custom Image Type Description [CUSTOM_IMAGE_TYPES.IMAGE_TYPE_DESCRIPTION]
- Custom Image Type ID [CUSTOM_IMAGE_TYPES.IMAGE_TYPE]

Five fields in the Custom Image Files table have been renamed.

- Custom Image File ID [CUSTOM_IMAGES.IMAGE_ID]
- Custom Image File Name [CUSTOM_IMAGES.IMAGE_DESCRIPTION]
- Custom Image Type ID [CUSTOM_IMAGES.IMAGE_TYPE]
- Deleted [CUSTOM_IMAGES.DELETED]
- Hidden [CUSTOM_IMAGES.HIDDEN]

One field in the Custom Metadata ID Types table has been renamed.

- Translation Token ID [CUSTOM_METADATA_ID_TYPE.RESOURCE_ID]

Two fields in the File Processing Types table have been renamed.

- File Processing Type Description [FILE_PROCESSING_TYPE.TYPE_DESCRIPTION]
- File Processing Type ID [FILE_PROCESSING_TYPE.PROCESSING_TYPE_ID]

Two fields in the Generic File Types table have been renamed.

- Generic File Type Description [MISC_FILE_TYPES.MISC_FILE_DESCRIPTION]
- Generic File Type ID [MISC_FILE_TYPES.MISC_FILE_TYPE]

Four fields in the Generic Files table have been renamed.

- Deleted [MISC_FILES.DELETED]
- Generic File Description [MISC_FILES.FILE_DESCRIPTION]
- Generic File ID [MISC_FILES.FILE_ID]
- Generic File Type ID [MISC_FILES.MISC_FILE_TYPE]

One field in the Import Field Categories table has been renamed.

- Translation Token ID [IMPORT_FIELD_CATEGORIES.IMPORT_FIELD_CATEGORY_RESOURCE_ID]

Three fields in the Navigation Bar Menu Labels table have been renamed.

- Last Update Date [BANNER_LABELS.DATE_ADDED]
- Menu Group ID [BANNER_LABELS.MENU_GROUP_ID]
- Translation Token ID [BANNER_LABELS.LABEL_RESOURCE_ID]

Three fields in the PDF Cover Page Types table have been renamed.

- Merged [PDF_COVERPAGE_TYPES.USE_MERGE]
- PDF Cover Page Type Description [PDF_COVERPAGE_TYPES.COVERPAGE_TYPE_DESCRIPTION]
- PDF Cover Page Type ID [PDF_COVERPAGE_TYPES.COVERPAGE_TYPE]

Three fields in the PDF Files table have been renamed.

- Deleted [PDF_FILES.DELETED]
- PDF File ID [PDF_FILES.PDF_ID]
- PDF Type ID [PDF_FILES.PDF_TYPE_ID]

Two fields in the PDF Types table have been renamed.

- PDF Type Description [PDF_TYPES.PDF_DESCRIPTION]
- PDF Type ID [PDF_TYPES.PDF_TYPE_ID]

One field in the Publisher Zip Statuses table has been renamed.

- Publisher Zip Status ID [PUBLISHER_ZIP_STATUS.ZIP_STATUS_ID]

Three fields in the Reviewer Display Preferences table have been renamed.

- Classifications Display [REVIEWER_DISPLAY_PREFERENCES.CLASSIFICATIONS]
- People ID [REVIEWER_DISPLAY_PREFERENCES.PEOPLEID]
- Reviewer Display Preference ID [REVIEWER_DISPLAY_PREFERENCES.ID]

Two fields in the Submission File Approval Types table have been renamed.

- Approval Type Description
  [SUBMISSION_APPROVAL_TYPES.SUBMISSION_APPROVAL_TYPE_DESCRIPTION]
- Submission File Approval Type ID [SUBMISSION_APPROVAL_TYPES.SUBMISSION_APPROVAL_TYPE]

One field in the Submission File Processing Details table has been renamed.

- File Processing Type ID [SUBMISSION_FILE_PROCESSING.PROCESSING_TYPE_ID]

Two fields in the Zip File Types table have been renamed.

- Zip File Type Description [ZIP_FILE_TYPES.ZIP_FILE_DESCRIPTION]
- Zip File Type ID [ZIP_FILE_TYPES.ZIP_FILE_TYPE]

Four fields in the Zip Files table have been renamed.

- Deleted [ZIP_FILES.DELETED]
- People ID [ZIP_FILES.PEOPLEID]
- Zip File ID [ZIP_FILES.FILE_ID]
- Zip File Type ID [ZIP_FILES.ZIP_FILE_TYPE]

TO CONFIGURE:

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