

Welcome to EEMUG 2016



em Editorial Manager®
www.ariessys.com

Aries
systems
Publish Faster. Publish Smarter.

TENTATIVE AND SUBJECT TO CHANGE

Version 13.1

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Version 13.1

Beta to begin September/October 2016

Upgrades January/February 2017

TENTATIVE AND SUBJECT TO CHANGE

Register via ORCID

Registering on any system is an arduous task, especially if a lot of information is required, and especially when you have already entered the same data in so many other places!

It is overwhelmingly accepted throughout STM publishing that ORCID iD's are a necessary standard that assists in disambiguating people and facilitates system interoperability. Everyone needs to get and use their ORCID iD!

SOLUTION: Fetch registration data from ORCID to make registration EASIER!


Push users to register an ORCID iD and pull that Authenticated ORCID iD into EM/PM!

Register via ORCID

Pre-registration Page

To register to use the Editorial Manager system, please enter the requested information. Upon successful registration, you will be sent an e-mail with instructions to verify your registration.

Choose a Registration Method

 Use your ORCID

Or type in your details:

First Name*

Last Name*

E-mail Address*

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 delays or prevent the processing of any review or manuscript you submit. If you are unsure if you are already registered, click the 'Forgot Your Password?' button.

If you are registering again because you want to change your current information, changes must be made to your existing information by clicking the 'Update My

NOTE: A PolicyManager configuration can force registration via ORCID upon clicking *any* 'Register' action link.

Register via ORCID

The following EM/PM fields are populated on the *Registration* page:

Given/First Name
Family/Last Name
Email (possibly multiple)
Keywords
Position
Institution
Department
City
State or Province
Country

Hide “Preferred Method of Contact”

Some publications do not want to give users an option to select a Preferred Method of Contact other than email.

SOLUTION: Publications can set Preferred Method of Contact to “hidden”, thus making email the only preferred method, as well as making email a required field.

NOTE: Users who have already identified something other than email as their preferred method of contact, and who have not entered an email address, will continue to have their preference enforced. However, they will no longer see the Preferred Method of Contact setting when they go to update their record, and they will be forced to enter an email address when submitting that page.

Excluding People from Reminders

Sometimes a particular user, often a valued reviewer or author, asks not to receive reminder emails. It is within the publication's interest to heed this request and exclude the user when sending reminders.

Sometimes a user will let an editorial office know that they will soon submit a review or a revision. The editorial office then wants to be sure that no reminder gets sent to that person.

This is easily handled when sending manual reminders – but not possible when automated reminders are configured.

SOLUTION: A new checkbox in a user record excludes a user from receiving automated reminder emails.

Excluding People from Reminders

Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

John Adams

Self-Registered:
Jun 21 2005 10:54AM

Last Modified:
Jun 21 2005 10:54AM

Inactivate this User

Send Login Details

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

(Enabled by Mark Watney, Managing Editor, Oct 13, 2015)

User Information

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

User Name *

Password *

[Password Rules](#)

Default Login Menu

Editorial Menu ▼

Available as a Reviewer?

Yes No

Board Member?

Yes No

Forbidden as a Reviewer?

Yes No

Reviewer Role *

None ▼

Publisher Role *

None ▼

Editorial Role *

None ▼

Editor Description

Activity Details

Personal Information

Title

(Mr., Mrs., Dr., etc.)

Given/First Name *

Secondary Given/First Name

Excluding People from Reminders

Send Reminder	Action	Manuscript Number	Article Type	Date MS/Revision Submitted	Days Under Review	Reviewer Name & Status	# Additional Reviewers Needed	# Requirec Reviews
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers	DEMOSGG-15-52	Demo	10/28/2015	N/A	No Reviewers Invited or Assigned	2	2
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers Submit Editor's Decision and Comments	DEMOSGG-15-49	Demo2	10/01/2015	N/A	No Reviewers Invited or Assigned	2	2
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers	DEMOSGG-15-50	Demo	10/01/2015	N/A	No Reviewers Invited or Assigned	2	2
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers View Reviews and Comments Submit Editor's Decision and Comments	DEMOSGG-15-48	Demo	09/17/2015	N/A	No Reviewers Invited or Assigned	0	0
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers Submit Editor's Decision and Comments	DEMOSGG-15-51	Demo	09/17/2015	N/A	No Reviewers Invited or Assigned	2	2
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers View Reviews and Comments	DEMOSGG-15-45	Demo	07/23/2015	N/A	No Reviewers Invited or Assigned	0	0
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers	DEMOSGG-15-39	Special Issue Article	03/12/2015	128	Bryan Brown (Reviewer) Un-invited	0	0

Additional Criteria in Search Submissions

Because submission records are “actionable” from Search Submissions, this tool is one of the most used features in EM/PM. There are always new pieces of data that people would like to be able to search on.

SOLUTION: Four new field have been added:

- **Technical Check Complete Date**
- **Editor Decision**
- **Handling Editor Role**
- **Assigned Editor Role**

Additional Criteria in Search Submissions

Technical Check Complete Date: only available if Tech Check is enabled; value is a date; only Editors with access to Tech Check will get Action Link in results.

Editor Decision: the most recent decision for the current revision of the submission, the Value dropdown will display the Decision Terms configured on the *Edit Editor Decision Terms* page.

Handling Editor Role: the Value dropdown will display the existing Editor roles configured on the *RoleManager Editor Roles* page.

Assigned Editor Role: the Value dropdown will display the existing Editor roles configured on the *RoleManager Editor Roles* page.

First Receipt Date: the first date a submission was received, as opposed to Initial Date Submitted, which reflects the date the submission actually enters the workflow; value is a date.

Submit Manuscript User Interface Improvements

Incomplete Submission Step Indicator – When an author proceeds from a step without completing all required information, a red warning icon will be used in place of the checkmark for that step.

Suggest/Oppose Reviewer UI Redesign – The Suggest Reviewers and Oppose Reviewers submission steps will have the style and behavior of the recently modernized *Add/Edit/Remove Authors* and *Funding Information* submission steps.

Incomplete Submission Step Indicator

Revised Submission

PONE-D-14-32544R1

- ✓ Select Article Type
- ✓ Enter Title
- ▲ Add/Edit/Remove Authors
- ✓ Funding Information
- ✓ Select Section/Category
- ✓ Submit Abstract
- ✓ Enter Keywords
- ✓ Additional Information
- ✓ Enter Comments
- ✓ Suggest Reviewers
- Oppose Reviewers
- ✓ Respond to Reviewers
- ▲ 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.

One or more required items are missing:

	Online	Offline		Online	Offline
*Cover Letter	0		*Manuscript	0	
Figure	4		Supporting Information	1	
Supporting Information - Compressed/ZIP File Archive	0		Striking Image	0	0
Other	0		Revised Manuscript with Track Changes	0	
Response to Reviewers	0		LaTeX Source File (TEX file)	0	
LaTeX Bibliography (BIB file)	0				

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

Required information is missing for the following Authors. Please go back to the **Add/Edit/Remove Authors** step or click the Author's name below to enter the required information:

[Yang Zhao](#)

Suggest/Oppose Reviewer Redesign

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

[Insert Special Character](#)

Suggest Reviewers

Please suggest potential reviewers for this submission.

Use the provide that the the sele

A * indi

Current A

... [icon] [icon] [icon] [icon]

Open Special Character Palette

Given/First Name*

Middle Name

Family/Last Name* ⚠

Academic Degree(s)

E-mail Address* ⚠

Institution* ⚠

Department

APC API Improvements

Submission Date: Currently the API call to the payment system does not include the Initial Date Submitted. This information could be relevant for determining pricing, especially if pricing or special discounts are date-related.

Grant Recipient: Currently the API call to the payment system includes Funding Information. This passes the FundRef name and ID to the payment system. The API call will now include information about the Grant Recipient for each grant identified by the Author.

Transfer Co-Author Questionnaires

Transferring submissions from one publication to another in a family of publications is strategically important for many publishers.

Automatically transferring submission files and data means the Author has less work to do and results in a positive experience!

Currently the Co-Author Questionnaires do not transfer – resulting in extra work for authors and contributors.

SOLUTION: Co-Author Questionnaire responses will be transferred as part of any EM-to-EM transfer.

Article Type ID

Transferring submissions from one publication to another in a family of publications is strategically important for many publishers.

Different publications use different terminology for essentially the same types of articles; for example: “Original Research”, “Original Study”, “Original Article”, etc.

Today EM/PM uses a string match in transfer, import and export functions, which can lead to confusion and mistakes.

SOLUTION: Use “Custom Metadata IDs” for Article Types.

Note: These are already available for Custom Questions and AMDs.

Article Type ID

Edit Article Type

Cancel

Submit

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

Family: Regular

Editor Use Only:

Hide When you **Hide** an Article Type, the Article Type will be deactivated (not available for new or revised manuscript

Allow file uploads from arXiv.org server

Custom Metadata ID:

[Insert Custom Metadata](#)

Similarity Check:

Duplicate Submission

Author Parameters

Number of days Author
Revise Submission:

Custom Metadata ID

This ID is used to uniquely identify this question within Editorial Manager and Prodxion Manager. It may also be used to identify matching questions in a separate publications (such as during submission transfer).

This field must be unique within the scope of a single Journal database. It may not be more than 128 characters and must be a valid XML name. i.e. it must begin with a letter and may only contain letters and symbols in the following sets: A-Z, a-z, 0-9

Submission
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Date

Custom Metadata ID Lists

EM/PM Custom Metadata ID functionality is tremendously useful for matching non-standard types of data when importing, ingesting, transferring, exporting or transmitting from one publication to another, or to a third party system.

















But remembering all those ID's is a major hassle!!!

SOLUTION: Build predefined lists of “Custom Metadata IDs” so that the user can select the ID, rather than type the ID.

Note: there are three functions that use Custom Metadata IDs:

- Additional Manuscript Details (AMDs)
- Custom Questions
- Article Types

Custom Metadata ID Lists

Custom Metadata ID List		+ Add Custom Metadata ID	
	  	Original_Paper Standard article, usually presenting new results	Article Type
	  	Review_Paper Standard article, interpreting previously published results	Article Type
	  	Color_Figures_1 Used for Custom Questions	Custom Question
	  	Quick_Review_1 Used for AMD's	AMD

+ Add Custom Metadata ID

Enter Custom Metadata ID Details



Custom Metadata ID:

Description:

Usage:

- Additional Manuscript Details
- Article Type
- Custom Question



Custom Metadata ID Lists – 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 n

Family: Regular

Editor Use Only:

Hide When you Hide ar

Allow file uploads from ar

Custom Metadata ID: ?

[Insert Custom Metadata ID](#)

Similarity Check:

Insert Custom Metadata ID

You can select a Custom Metadata ID by clicking the name [\(more...\)](#)

Original_Paper	View Description
Review_Paper	View Description

Duplicate Submission Check: Check for duplicate submissions to Editorial Manager

You must also enable the che
Configure Duplicate Submissi

Custom Metadata ID Lists - Custom Question

Edit Custom Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented as part of submission, author verification or production task completion.

Part of page omitted

Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote
- Include in Publication Charges Metadata

Custom Metadata ID: 

[Insert Custom Metadata ID](#)

In addition to being displayed as part of a question, you can configure the question to be displayed in other locations configured below. If Help Text is enabled, the question will be displayed in the Help Text area.

Insert Custom Metadata ID

You can select a Custom Metadata ID by clicking the name [\(more...\)](#)

Color_Figures_1	View Description
License_Type	View Description

Custom Metadata ID Lists - AMD

Add Additional Manuscript Detail Field

Field Description:

[Insert Special Character](#)

Candidate for Quick Review

Maximum 256 characters

Part of page omitted

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input type="checkbox"/>		
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>		

Insert Custom Metadata ID

You can select a Custom Metadata ID by clicking the name [\(more...\)](#)

Quick_Reviews_1	View Description
Board_Member	View Description

Custom Metadata ID:

[Insert Custom](#)

Reviewer Invite Letter for Revisions

Publications want Reviewers to know that a review invitation or assignment is for a revision of a paper they previously reviewed.

Sometimes a new Reviewer is asked to review a revision of a paper, and there needs to be an invitation letter sent that is different than that sent to the other Reviewers who reviewed the initial submission.

SOLUTION: Two alternate default letters can be configured to be sent to Reviewers. The system will check to see if the Reviewer has been involved in the previous round of review, or if it is a new Reviewer reviewing a revision, and send the appropriate letter (or present it for customizing).

Alternate Reviewer Promotion Option

If a Reviewer declines an invitation, an Alternate Reviewer who has the SAME Reviewer Role is automatically promoted as a replacement.

For some publications, matching Reviewer Roles is not an important criteria for promotion. However, there is no way to disable the role-matching criteria.

SOLUTION: A new configuration option to allow auto-promotion of Alternate Reviewers that have a *different* RoleManager role from that of the Reviewer he or she is replacing.

Alternate Reviewer Promotion Option

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 Un-assign Reviewers n days after 'Date Review Due'

Automatically Un-assign late Reviewers with partial review saved.

New and Revised Submissions

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

Assign an Author

Currently Editors can only INVITE Authors to submit manuscripts for things like special issues, review articles and book-type publications.

When participation in a project is already committed, responding to an invitation is an extra, unnecessary step for contributors. It would be more efficient to ASSIGN the authors.

SOLUTION: The Author Candidates grid is enhanced to provide separate options for 'Invite' and 'Assign' in place of the existing 'Select' option.

Assign an Author

Ability to assign an Author is controlled by Editor RoleManager permission.

Two new ActionManager events, “Author Assigned (Not Invited)” and “Author Unassigned”, are used to send letters. They do not affect Document Status.

The “Assigned” designation can be included in the Author List File (ALF) used in the Upload Author List File function.

Assign an Author

Author Candidates

Check the box for each person you want to invite to submit, and then proceed.

Invite All / Assign All / Clear All Page: 1 of 2 (12 total Authors) 1 2 >> >| Display 10 results per page.

Select As		Number of Letters	Author Name	Board Member	Submissions Being Processed		Author Statistics			Invitation Statistics	
Inv.	Asn.				Invited	Unsolicited	Agreed and Awaiting Submission:	Assigned Submissions Received:	Invited Submissions Received:	Date Last Invited:	Outstanding Invitations:
<input type="checkbox"/>	<input type="checkbox"/>		Alfonso Di Girolamo, Jr.	No			2	2	0	-	
<input type="checkbox"/>	<input type="checkbox"/>		Michael Di Natale, MD	No							
<input type="checkbox"/>	<input type="checkbox"/>		James G. Diamond, MD	No							

Agreed to Submit - Nov 5 2015

Invite All / Assign All / Clear All

Select As		Number of Letters	Author Name	Board Member
Inv.	Asn.			
<input type="checkbox"/>	<input type="checkbox"/>		Alfonso Di Girolamo, Jr.	

Persistent Invited Submission Numbering

A Proposal and the invited submissions related to the Proposal are linked in the system. However, it is not always obvious to an Editor that a submission has a parent Proposal when looking at the submission in isolation.

It would be useful to incorporate an identifier, such as the Proposal's manuscript number, into the manuscript number of the invited submission, in order to keep a persistent connection between the Proposal and the invited submissions.

SOLUTION: Editors can enter a prefix value, and a start position and format for an incrementing number to be included in the manuscript number for any child submissions linked to the Proposal.

Persistent Invited Submission Numbering

Author Invitation Parameters:

Target Publication Date:

Required ▾

Number of Days Author has to Respond to Invitation:

0

Author Submission Due:

(Select a Due Date Calculation Method):

0

- Number of days prior to Submission Target Publication Date:
- Number of days after Author has accepted invitation:

Automatically Un-Invite Authors:

Automatically Promote Alternate Authors:

Invited Submission Manuscript Number Format:

- Automatically Assign Customized Manuscript Number for Invited Submissions
[Prefix.IncrementingNumber]
 - Include Proposal Manuscript Number [Prefix.ProposalManuscriptNumber.IncrementingNumber]

Persistent Invited Submission Numbering

Initiate Proposal

Select an Article Type for the proposal, then enter a Proposal Title and other information.

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 ▼
Pre-select Article Type for Invited Submissions generated from this Proposal:	Author Will Select ▼
* Title:	

Part of page omitted

Author Submission Due: Number of Days prior to Target Publication Date	<input type="text" value="0"/> A value of zero indicates the Submission due date feature is not being used.
Manuscript Number:	<input type="text"/> Required field
* Invited Manuscript Number Format:	Prefix.ProposalManuscriptNumber.IncrementingNumber
Prefix:	<input type="text"/>
Starting Number:	<input type="text"/> Required field
Minimum Number of digits in Starting Number:	<input type="text"/> Required field
	<input type="button" value="Preview"/>

Closing Observation

Aries has, and will continue to, build an “operating system” for scholarly publishing. This involves:

- Extensive integration with other systems enabled by emerging standards
- Making significant financial annual investments
- Promoting an organizational culture that supports innovation
- Promoting productive and creative feedback loop with users and customers

THANK YOU!

Tony Alves, Director of Product Management

