

CONFIDENTIAL AND PROPRIETARY

Release Notification

 **Editorial Manager[®]**

 **ProduXion Manager[®]**

 **Commerce Manager[™]**

Editorial Manager/ProduXion Manager

10.1 General Release Notification

07/19/13

Draft – Subject to Change

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Document Change Log

Date	Version	Change
04/26/2013	Beta Release	Beta version
06/12/2013	Gamma Release	New "Additional Reference Checking Option" section added
07/19/2013	General Release	Included some clarifying notes to sections Added "Cross-Publication EAR" Release Notes

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GENERAL ENHANCEMENTS

Additional Personal Identifier Functionality – ORCID

In EM/PM v10.0, publications may configure any or all of five (5) Personal Identifier fields as optional or required information for Registration or when adding Co-Authors to a submission. Specific functionality exists for ORCID identifiers; users may look up and/or confirm the ORCID for themselves or Co-Authors using a “Fetch” option that uses the ORCID API search feature to request a list of ORCID profiles that match people metadata on the calling page.

New in EM/PM v10.1, users who are registering with EM or are updating their existing EM account may now use a new “Fetch/Register” function to Register in the ORCID system or log in with an existing account and connect that ORCID to their EM user record. If the user has already entered an ORCID, a “Fetch/Validate” function can be used to confirm the ORCID is a valid account in the ORCID database. NOTE: EM does not actually establish a permanent connection with the user’s ORCID profile, but rather it checks the ORCID system to confirm which ORCID identifier belongs to the current user.

When a user is registering, or editing their own *Update My Information* page (for publications configured with the “ORCID” as an optional or required registration field), the user will see a new Fetch/Register link next to the ORCID field (if there is not currently an ORCID in the field).

The screenshot displays the 'Update My Information' page. On the left, there is a sidebar with the title 'Update My Information' and instructions: 'To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.' Below this is a link: 'Edit "Go to" Publication List'. The main content area is divided into two sections: 'Login Information' and 'Personal Information'. The 'Login Information' section includes fields for 'Username' (containing 'mary') and 'Password' (masked with asterisks), a 'Default Login Role' dropdown set to 'Editor', and a 'Fetch/Register' link. The 'Personal Information' section includes fields for 'Title' (containing 'Dr.'), 'First Name' (containing 'Mary'), and 'Middle Name' (containing 'François'). Below these is a yellow box highlighting the 'ORCID' field (containing 'aa') and the 'Fetch/Register' link. Below the ORCID field are fields for 'Published Author ID' and 'Scopus Author ID', and an 'Alternate Contact Information' button. A note at the top right of the page states: 'This journal requires that you are identified by an ORCID or ISNI number. To get an ORCID number please visit: www.orcid.org. To get an ISNI number please visit: www.isni.org'.

[MIDDLE OF PAGE NOT DISPLAYED]

If a user has already entered an ORCID but it has not been authenticated, a new Fetch/Validate link displays next to the ORCID field.

This journal requires that you are identified by an ORCID or ISNI number. To get an ORCID number please visit: www.orcid.org. To get an ISNI number please visit: www.isni.org

ISNI

ORCID [Fetch/Validate](#)
(e.g.: 1234-1234-1234-123X)

PubMed Author ID

Scopus Author ID

[Alternate Contact Information](#)

Clicking either [Fetch/Register](#) or [Fetch/Validate](#) link opens the *ORCID Login/Register* page in a new window. The user may register for a new ORCID, or if they already have an ORCID, log into the site using their login information.

ORCID - Windows Internet Explorer
 https://orcid.org/oauth/signin

ORCID
 Connecting Research and Researchers

SIGN IN

Email or iD

Password

[Sign in](#)

[Forgotten Password?](#)

DON'T HAVE AN ID? REGISTER

First name *

Last name *

Email *

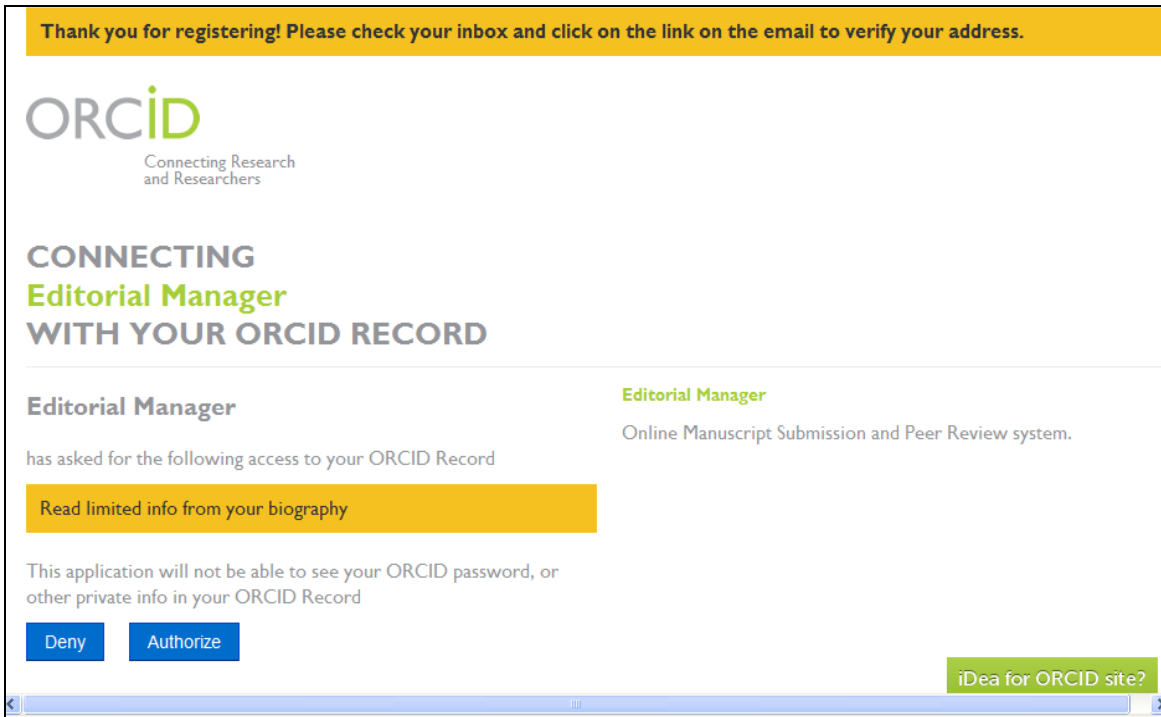
Re-enter email *

Password *


Re-enter Password *

[iDea for ORCID site?](#)

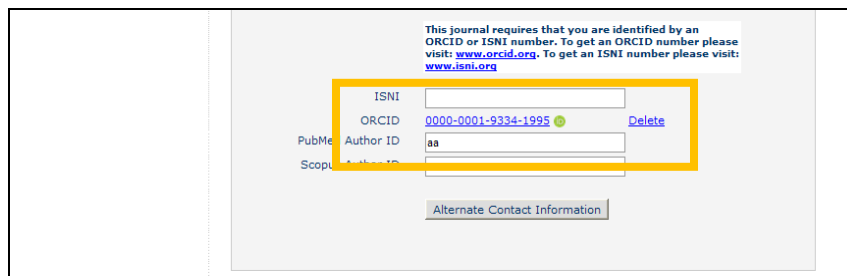
Once the user logs in, or registers for a new ORCID, he is brought to a confirmation page, asking the user permission to connect their ORCID record to their EM user record.



If the user clicks the ‘Deny’ button, they have still registered for a new ORCID, but the ORCID is not returned to EM.

If the user clicks the ‘Authorize’ button, the ORCID window is closed, and the user returns to the EM page. Their ORCID is populated in the field with a new ‘ORCID’ icon  next to the ID. NOTE: If an existing ORCID has been typed by a user in EM, the Authorized ORCID replaces the typed ORCID on the user’s record.

A Delete link displays next to the confirmed ORCID field. A user may delete their validated ORCID if they choose to do so, but a validated ORCID cannot be edited in EM.



NOTE: If an Editor has proxied into a user record where the user has validated their ORCID, the Editor cannot delete that user’s ORCID.

This journal requires that you are identified by an ORCID or ISNI number. To get an ORCID number please visit: www.orcid.org. To get an ISNI number please visit: www.isni.org

ISNI

ORCID Fetch
(e.g.: 1234-1234-1234-123X)

PubMed Author ID

Scopus Author ID

NOTE: An Editor with “Search People” permission is allowed to delete an ORCID when editing a user’s record from *Search People*, but cannot edit an ORCID that the user has validated.

If a user is editing or creating a user record for another user (such as entering Co-Author information or proxy registering a new reviewer), the existing (v10.0) functionality applies; users may use the Fetch link next to the ORCID field to run a search of the ORCID database to identify the correct ORCID for the record being added or edited. The actual record-holder will then be able to validate the record with ORCID when they log in (if they choose to do so).

E-mail Address *

If entering more than one e-mail address, use a semi-colon between each address (e.g., joe@thejournal.com;joe@yahoo.com). Entering a second e-mail address from a different e-mail provider decreases the chance that SPAM filters will trap e-mails sent to you from online systems. [Read More](#).

Preferred Contact Method * E-mail Fax Postal Mail Telephone

This journal requires that you are identified by an ORCID or ISNI number. To get an ORCID number please visit: www.orcid.org. To get an ISNI number please visit: www.isni.org

ISNI *

ORCID [Fetch](#)

(e.g.: 1234-1234-1234-123X)

PubMed Author ID

Scopus Author ID

To assist in reporting (using Custom Reports or EAR reports), a new “ORCID Authenticated” field is added to the following views:

- Authors and Submissions View
- People and Address View
- People and Classifications View
- People and Keywords View

A new “Corresponding Author ORCID Authenticated” field is added to these views:

- Editors and Submissions View
- Reviewers and Submissions View
- Submission Production Tasks View (PM users only)

TO CONFIGURE:

No additional configuration is necessary. When the ORCID personal identifier field is configured to be optional or required in areas in EM, the new “Fetch/Register” / “Fetch/Validate” functionality will be made available.

Assign Manuscript Number at Submission

In EM v10.0, new submissions are assigned a Manuscript Number before an Editor is invited/assigned to handle a submission. Manuscript numbers may be automatically assigned, or manually assigned by an Editor (such as an Editorial Office staff member) before the initial Editor assignment. Some publications use the Technical Check feature on a submission which takes place prior to the assignment of a Manuscript Number. Having a MS Number in place may be useful for assisting in tracking submissions that may need to be sent back to the Author for additional information.

New in EM v10.1, publications may now configure the Manuscript Number to be automatically assigned upon initial receipt of a new submission. When this new setting is configured, a manuscript number is assigned at the following events:

- New Submission Sent to Publication
- New Child Submission Sent to Publication
- Create Proposal

NOTE: If the publication configures the new “Automatically Assign Manuscript Number at Author Submission” setting, and there are manuscripts in the workflow that have not yet been assigned a Manuscript Number, these submissions will be assigned a Manuscript Number (using the designated format) in the sequence in which they were received by the publication.

NOTE: When this setting is enabled, and a submission is removed after a manuscript number has been assigned, that manuscript number will not be reused on future submissions.

TO CONFIGURE:

To configure your publication to have Manuscript Numbers assigned at the time an Author Submits the submission, go to PolicyManager, [Set Manuscript Number Type](#). Select the new “Automatically Assign Manuscript Number at Author Submission” radio button in the “Manuscript Number Assignment Method” section.

Set Manuscript Number Format

Manuscript Numbers may be assigned manually or automatically. The Manual Assignment Method requires that a unique alphanumeric identifier is entered manually for each new manuscript. Manuscript Numbers may be automatically assigned when the Author first submits the manuscript or when the submission has been processed, e.g. when an Editor has been invited or assigned.

For Automatic Manuscript Number Assignment, one of the following formats may be selected:

- The Default Auto-Increment Format consists of a journal acronym, followed by "-D-", a two digit year code, and a five digit number that is automatically incremented for each new manuscript.
- The Journal Auto-Increment Format consists of a journal supplied alphanumeric prefix and a numeral that is automatically incremented for each new manuscript.

Manuscript Number Assignment Method

- Manually Assign Manuscript Number
- Automatically Assign Manuscript Number at Author Submission
- Automatically Assign Manuscript Number When an Editor is Assigned

Manuscript Number Format for Automatic Assignment

- Default Auto-Increment Format
- Journal Auto-Increment Format

Cancel

Submit

NOTE: On upgrade to v10.1, the publication's existing settings are retained.

New Manuscript Number Formatting Options

In EM v10.0, publications may be configured to either manually or automatically assign manuscript numbers to submissions. When MS numbers are configured to be automatically assigned, then publications are able to further define what format the automatically assigned MS number will take; either the default auto-incremented option, or the publication can choose a prefix and starting number to be used when automatically assigning MS Numbers.

New in EM v10.1, publications may include additional information in the “Journal Auto-Increment Format”.

- Periods [.] may now be used in the Prefix
- Two new codes are available for use in the Manuscript Number Prefix (not for use anywhere else in the system) that allow the Current Year to be included as an element of the Manuscript Number.
 - %CURRENT_YEAR_YY%
 - OR
 - %CURRENT_YEAR_YYYY%
- When either of these codes are included in the Prefix, then the Starting Number field reverts to a value of “1” when the year changes.
- A new “Minimum Number of digits in Starting Number” field is available to determine a minimum number of digits in the suffix of the manuscript. If you wish to have a minimum of 3 digits used, then if the “Starting Number” is fewer than 3 digits leading zeros will be prepended to the Starting Number.
- A new ‘Preview’ button is available to allow the administrator to see what the manuscript number formatting will look like.

TO CONFIGURE:

To configure the format of your publication’s automatic Manuscript Numbers, go to PolicyManager, and click the [Set Manuscript Number Type](#) link in the “General Policies” section. Select either of the “Automatically Assign Manuscript Number” options in the upper set of radio buttons on the page. When either of these options is selected, then the lower set of “Manuscript Number Format for Automatic Assignment” options becomes available for selection.

Set Manuscript Number Format

Manuscript Numbers may be assigned manually or automatically. The Manual Assignment Method requires that a unique alphanumeric identifier is entered manually for each new manuscript. Manuscript Numbers may be automatically assigned when the Author first submits the manuscript or when the submission has been processed, e.g. when an Editor has been invited or assigned.

For Automatic Manuscript Number Assignment, one of the following formats may be selected:

- The Default Auto-Increment Format consists of a journal acronym, followed by "-D-", a two digit year code, and a five digit number that is automatically incremented for each new manuscript.
- The Journal Auto-Increment Format consists of a journal supplied alphanumeric prefix and a numeral that is automatically incremented for each new manuscript.

Manuscript Number Assignment Method

Manually Assign Manuscript Number

Automatically Assign Manuscript Number at Author Submission

Automatically Assign Manuscript Number When an Editor is Assigned

Manuscript Number Format for Automatic Assignment

Default Auto-Increment Format

Journal Auto-Increment Format

When the “Journal Auto-Increment Format” radio button is selected, a new section is displayed in the lower portion of this page (previously displayed on a subsequent page in the process). In this lower portion of the page, the publication may configure a Prefix and a Starting Number (as in v10.0), as well as a Minimum Number of digits in the Starting Number.

- Periods [.] may now be used in the Prefix
- Two new codes are available for use in the Prefix:
 - %CURRENT_YEAR_YY%
 - OR
 - %CURRENT_YEAR_YYYY%

The year displayed is the current system year

The ‘Preview’ button may be used to see what the formatting will look like to assist in determining Manuscript Number Formatting.

Sample configuration:

Set Journal Auto-Increment Manuscript Number Format

Please enter a prefix and a starting number. The prefix can contain numbers, letters and the "." character. %CURRENT_YEAR_YY% or %CURRENT_YEAR_YYYY% may be used to pull in the current year when the date changes.

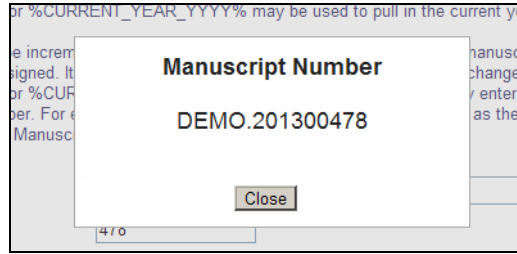
The starting number will be incremented and appended to the prefix to create a unique manuscript number each time a manuscript number is assigned. It will revert to 1 as the starting number when the year changes (e.g. 00001) if either %CURRENT_YEAR_YY% or %CURRENT_YEAR_YYYY% is used in the prefix. You may enter the number of digits to be used for the starting number. For example, if you enter '1' as the starting number and '5' as the number of digits in the starting number, the next ManuscriptNumber assigned will end in '00001'.

Prefix

Starting Number

Minimum Number of digits in Starting Number

Preview would look like:



Enhanced Visibility to Manuscript Number

In EM v10.0, Manuscript Number is used throughout the system for use in tracking assignments. New in EM v10.1, “Manuscript Number” is now added as a column in the following folders (depending on publication configuration).

The *New Submissions* folder:

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 1 (6 total submissions) Display 500 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Details Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Classifications Set Final Disposition Initiate Production AuthorMapper WPIAE Author Mapper LASTNAME Send E-mail Linked Submissions			Perspective	Checking on corr auth changes	Edward Editor, MD	Jan 21 2013 12:15PM	Jan 21 2013 12:15PM	Received by Journal

The Author’s *Submissions Sent Back to Author* folder displays the Manuscript Number column when the publication is configured to assign Manuscript Numbers upon submission (see the “Assign Manuscript Number at Submission” section of these Release Notes for more information):

Submissions Sent Back to Author Sally Editor

These submissions have been sent back to you. The 'View Letter' link allows you to see the letter associated with the returned submission.

The 'Edit Submission' link allows you to fix or alter your submission. Please use Edit Submission to make changes to the meta-data and to remove and upload new files that make up your submission.

The 'Remove Submission' link removes your submission from the system. Please use this ONLY if you would like to permanently remove this submission from the system.

Page: 1 of 1 (1 total submissions) Display 10 results per page.

Action	Manuscript Number	Title	Date Submission Began	Status Date	Current Status
View Submission View Letter Edit Submission Approve Submission Remove Submission Send E-mail	Test.Site.201200001	Use of statins as primary prevention of cardiovascular disease	Mar 29 2012 1:44PM	Aug 28 2012 10:54AM	Sent Back to Author

<< Author Main Menu

The Author's *Incomplete Submissions* folder displays the Manuscript Number column when the publication is configured to assign Manuscript Numbers upon submission (see the "Assign Manuscript Number at Submission" section of these Release Notes for more information):

The 'Edit Submission' link allows you to fix or alter your submission. Please use Edit Submission to make changes to the meta-data and to remove and upload new files that make up your submission.

Page: 1 of 1 (1 total submissions) Display 10 results per page.

Action	Manuscript Number	Title	Date Submission Began	Status Date	Current Status
Edit Submission Remove Submission Send E-mail	Test.Site.201200001	Testing MS Rating Questions	Oct 31 2012 11:30AM	Oct 31 2012 12:51PM	Incomplete

Page: 1 of 1 (1 total submissions) Display 10 results per page.

<< Author Main Menu

The Author's *Submissions Waiting for Approval* folder displays the Manuscript Number column when the publication is configured to assign Manuscript Numbers upon submission (see the "Assign Manuscript Number at Submission" section of these Release Notes for more information):

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 to remove and upload new files that make up your submission.

The 'Remove Submission' link removes your submission from the system. Please use this ONLY if you would like to permanently remove this submission from the system.

Please review the [Guidelines for Ethical Research](#) and confirm agreement below.

Page: 1 of 1 (1 total submissions) Display 10 results per page.

Action	Manuscript Number	Title	Date Submission Began	Status Date	Current Status	Guidelines for Ethical Research
View Submission Edit Submission Approve Submission Remove Submission View Reference Checking Results Send E-mail	Test.Site.201200001	Testing required/optional ORCID	Nov 30 2012 9:29AM	Dec 6 2012 1:26PM	Needs Approval	<input type="checkbox"/> I accept

Page: 1 of 1 (1 total submissions) Display 10 results per page.

<< Author Main Menu

TO CONFIGURE:

No additional configuration is required to display the Manuscript Number column in the *New Submissions* folder.

To display the Manuscript Number column in the Author's *Submissions Sent Back to Author* folder, the Author's *Incomplete Submissions* folder, and the Author's *Submissions Waiting for Approval* folder, go to PolicyManager, Set Manuscript Number Type, and select the new "Automatically Assign Manuscript Number at Author Submission" setting.

New Submission Item Type Option

Authors are increasingly offered the opportunity, and in some cases are required, to submit or provide access to data sets that are used in the research described in a manuscript. These data sets (and potentially other large data resources) are often housed at universities and other scientific institutions (such as institutional repositories) and are accessible via the Internet. Other resources that could be accessed include video (YouTube or other streaming service) and websites.

New in EM/PM v10.1, publications may configure Submission Items to allow Authors to provide URL/URI addresses rather than uploading large files. When an Item is configured so that the “URL/URI/External Resource Location” option is Optional or Required, and when that Item is configured for a selected Article Type, the Author will be presented with a new option on the *Please Attach Files* page of the Submission Process.

New Submission

- ✓ Select Article Type
- ✓ Enter Title
- Add/Edit/Remove Authors
- Enter Keywords
- Select Classifications
- Additional Information
- Enter Comments
- Request Editor
- ➔ 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.

Item: Video

Enter a **Description**. Select the Delivery Method Online Web System (to browse for a file) or **URL/URI/External Resource** (to enter a URL or other resource locator). If Online Web System is selected, click the button to locate the file you wish to select, then click the **Attach This File** button. If URL/URI/External Resource is selected, select the URL prefix (http://, https:// or ftp://), type in the remainder of the web address (e.g. www.targetsite.edu/datasets/dataset1), click the **Preview** button to validate your entry, then click the **Attach This Information** button.

Description: Video

Delivery Method: Online Web System URL/URI/External Resource

URL/URI/External Resource Location: http://

Please select http://, https:// or ftp://, then type in the remainder of the web address (e.g. www.targetsite.edu/datasets/dataset1) and click the 'Preview' button to ensure that the address you entered navigates to the correct location. Once you are satisfied with your entry, click the 'Attach This Information' button.

NOTE: If a Submission Item is configured to allow a URL/URI, the item should NOT be configured to allow Offline Submission as “Required” on the Article Type configuration page.

The Author provides the URL by selecting the “URL/URI/External Resource” option (if options are available), and entering the URL in the “URL/URI/External Resource Location” field. The Author can verify they have entered the correct destination by clicking the ‘Preview’ button to open the destination in a new window.

When the information is correct, he clicks the ‘Attach This Information’ button to add the new item to the File Grid (displayed on the lower portion of the page). When the item is listed in the File Grid, the File Name displays as External Item. Hovering the mouse over the link displays the URL it represents. Clicking this link will open the destination in a new window.

The order in which the attached items appear in the list will be the order in which they appear in the PDF file that is produced. You can re-order the items and click the 'Update File Order' button to effect the change.

[Check All](#) [Clear All](#)

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	Image - Application	Image - Application	External Item		Apr 1 2013 5:30PM	Access Item	<input type="checkbox"/>

[Update File Order](#) [Remove](#)

[Check All](#) [Clear All](#)

[Previous](#) [Next](#)

If an Item is configured for the PDF Handling method “Build Hyperlink to the Item into the PDF”, the name of the Item is shown at the top of the page in the PDF, followed by the full URL of the Item as a hyperlink on a new line.

Hyperlinked Item
[Click here to download Hyperlinked Item: EM Spec 9.0-50_CW.doc](#)

Publications may also configure Companion files to be a URL/URI type.

When a submission item is displayed on the *File Inventory* page, the file name displays as the link [External Item](#), and hovering the mouse over the link displays the URL it represents. Clicking this link will open the destination in a new window. The page can also be accessed by clicking the [Access Item](#) Action Link.

File Inventory Manuscript Number: Unassigned
Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE): "Demonstration of a new feature" [\(View Submission\)](#)

Listed below are the files included in the current version of the latest Revision of the submission. [\(more...\)](#)

[Download Selections as Zip File](#) [CrossCheck](#) [Close](#) [Save and Close](#)

Submission Files									
Check All	Action	Item	Description	Item Family	File Name	Size	Modified	QC	Display On TF
<input type="checkbox"/>	Download	Manuscript	Manuscript	Document	demo.manuscript.doc	25.5 KB	Apr 2 2013	Unres	
	Access Item	Video	Video	Figure	External Item		Apr 2 2013 4:29PM	N/A	

[Upload Companion File](#)

[Download Selections as Zip File](#) [Close](#) [Save and Close](#)

TO CONFIGURE:

To configure an Item Type to allow Authors to submit a URI/URL, go to PolicyManager, Edit Submission Items, and either Edit an existing item or add a new item. Select either “Optional” or “Required” for the new “URL/URI/External Resource Entry (in lieu of file upload)” drop-down option.

The screenshot shows the 'Edit Submission Item Type' form. The 'Item Type' field contains 'Image - Application'. The 'Item Type Family' is set to 'Default'. The 'PDF Handling' is set to 'Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)'. The 'URL/URI/External Resource Entry (in lieu of file upload)' dropdown menu is open, showing three options: 'Hidden', 'Optional', and 'Required'. The 'Hidden' option is currently selected. Below the dropdown menu, there are several checkboxes: 'Display with automatic line numbering in PDF', 'Include this Item Type for Artwork Quality Checking', 'Do Not Unpack Archive files (.ZIP, .tar) of this Type', 'Include this Item Type for Reference Checking', and 'This Item Type will contain reference annotations. Example'. The 'Cancel' and 'Submit' buttons are at the bottom.

NOTE: When you select “Required” from the list, the checkboxes “Include this Item Type for Artwork Quality Checking” and “Include this Item Type for Reference Checking” are grayed out and not available for selection.

The screenshot shows the 'Edit Submission Item Type' form with the 'URL/URI/External Resource Entry (in lieu of file upload)' dropdown menu set to 'Required'. The 'Include this Item Type for Artwork Quality Checking' and 'Include this Item Type for Reference Checking' checkboxes are grayed out. Yellow arrows point to these two checkboxes. The 'Cancel' and 'Submit' buttons are at the bottom.

If URL/URI/External Resource is set to “Required” the PDF Handling drop-down must be set to either “Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)” or “Companion File (not built into PDF)”.

Additional Reference Checking Option

In EM/PM v10.0, publications may use an optional feature called ‘Reference Checking’ which allows a publication to link, link and cleanup, or link and auto-correct reference citations in submissions using the “eXtyles” tool. When this feature is enabled by Aries staff for a publication, the System Administrator of the publication may configure the desired trigger points during the submission workflow (configured in PolicyManager).

New in EM/PM v10.1, a new “First Reviewer Invited/Assigned for Original Submission” (i.e. the start of peer review for Revision 0) trigger point is added to the existing list of optional trigger points. This trigger point applies to Rev 0 submissions only, not submissions that are at Rev 1+.

When this new trigger point is enabled for a site, then from that point “going forward”, when a submission with a Submission Item configured for Reference Checking reaches this new workflow trigger point for Revision 0 and the Submission Item has not yet been reference checked, then the Submission Item is sent to the Reference Checking tool. NOTE: This new trigger point does not apply to Revision 1+.

As with the existing functionality, a Submission Item is only sent to the Reference Checking tool at any configured workflow trigger point if the following two conditions are met:

1. The Submission Item is configured for Reference Checking (the checkbox ‘Include this Item Type for Reference Checking’ is selected on the *Add /Edit Submission Item Type* page) AND
2. The Submission Item hasn’t already been reference checked.

When the new trigger point is configured for a publication, then when a first Reviewer Invitation or Assignment is performed on the initial revision (Rev 0), then any Submission Items that are configured as ‘Include this Item Type for Reference Checking’ and have not already been through Reference Checking are sent through Reference Checking (the exact type of Reference Checking performed (Reference Linking, or Reference Cleanup and Linking) depends on the radio button selection for the trigger point).

TO CONFIGURE:

To add Reference Checking to your EM/PM site as a feature, please contact your Aries account coordinator.

For Publications already using Reference Checking, the current Reference Checking settings are retained at upgrade to v10.1. In addition to the current settings, Publications will see the new “First Reviewer Invited/Assigned for original Submission” trigger option available for selection on the *Configure Reference Checking* page in PolicyManager. This new setting is set to “No Reference Checking” upon upgrade.

Configure Reference Checking (powered by eXtyle X)

Configure one or more Reference Linking methods and the workflow points that will trigger Reference Checking. Add any instructions and text you would like to display on the results page. Submit this page, then click the 'Edit Submission Item Types' link to select at least one Submission Item for Reference Checking.

Cancel

Submit

[MIDDLE OF PAGE NOT DISPLAYED]

Select the workflow points that will trigger Reference Checking:

No Reference Checking	Reference Linking Only	
<input checked="" type="radio"/>	<input type="radio"/>	Original PDF Building by Author
<input checked="" type="radio"/>	<input type="radio"/>	Original PDF Building by Editor
<input type="radio"/>	<input checked="" type="radio"/>	First Reviewer Invited/Assigned for Original Submission
<input checked="" type="radio"/>	<input type="radio"/>	Revised PDF Building by Author
<input checked="" type="radio"/>	<input type="radio"/>	Revised PDF Building by Editor
<input checked="" type="radio"/>	<input type="radio"/>	Author Notified of Editor Decision in the 'Accept' Decision Family
<input checked="" type="radio"/>	<input type="radio"/>	Author Notified of Editor Decision in the 'Revise' Decision Family
<input type="radio"/>	<input checked="" type="radio"/>	Create Submission

In addition, one or more Submission Items must be configured as 'Include this Item Type for Reference Checking' on the *Edit Submission Item Type* page in PolicyManager.

Save Details without Closing

In EM/PM v10.0, Editors and Publishers may be given permission to view different *Details* page layouts, including many fields where users are able to enter data (such as entering Publication Date information, or entering Additional Manuscript Details fields, etc.). Users enter the information on the *Details* page, but in order to commit the changes the ‘Save and Close’ button must be clicked, closing the *Details* page and refreshing the underlying folder.

New in EM/PM v10.1, a new set of ‘Save’ buttons are added to the top and bottom of the *Details* page. These buttons allow the user to save the information being entered on the page and continue working without having to re-open the page.

The screenshot shows a web interface for manuscript details. At the top, the title is "Details for Manuscript Number: BETSYTEST90-D-11-00009" with a subtitle "Checking out how Suggest Reviewer works 04-21-2011". Below the title are three buttons: "Cancel", "Save" (highlighted with a yellow box), and "Save and Close". A navigation bar contains links for "Manuscript Notes", "Production Notes", "Editors", "Reviewers", and "Alternate Reviewers". The main content area includes a table with the following rows:

Additional Manuscript Details:	Add/Edit Additional Manuscript Details
Corresponding Author:	Kermit the Frog ,  , CONGO, THE DEMOCRATIC REPUBLIC OF THE [Proxy]
Corresponding Author E-Mail:	trash1@ariessc.com

[MIDDLE OF PAGE NOT DISPLAYED]

The bottom section of the page is titled "Alternate Reviewers" and contains the following text:

There are no Alternate Reviewers currently selected for this manuscript. [Top](#)

No Reviewers have been proposed by any Editor for this submission.

Author(s) Invited to Submit Commentary

No Authors have been invited to this manuscript.

Submission Actual Publication Date: (mm/dd/yyyy)

At the bottom of this section are three buttons: "Cancel", "Save" (highlighted with a yellow box), and "Save and Close".

NOTE: When the ‘Save’ button is clicked, though the *Details* page remains open, the underlying folder will refresh to reflect any modified data (such as Revision Due Dates, etc.).

NOTE: Because two users *may* be accessing the *Details* page of one submission simultaneously, it is important to note that the data saved by one user may be overwritten by another user, resulting in one user viewing “stale” data.


TO CONFIGURE:

No additional configuration is required. The ‘Save’ button is added to the *Details* page for all submissions upon upgrade.

New Reviewer Search Option (Reviewer Discovery)

In EM v10.0, Editors are presented with a number of ways they can search for Reviewers. These searches are run against the publication's pool of users (either with Reviewer Roles already, or from the entire database). If Editors know of a person they wish to ask to Review but that person is not registered in the publication, the Editor (with proper permission) may Proxy Register that user and invite them to Review a submission.

New in EM v10.1, Publications may choose to enable a new "Reviewer Discovery" option. This feature (enabled by Aries Support) initiates a search against a third-party database of biographic and bibliographic profiles on approximately 2.5 million scholars and researchers (including e-mail addresses) from ProQuest Community of Scholars (PQ). When this feature is used, the title and abstract of the submission is matched against these PQ profiles, returning matches based on how closely the topics reflected in the title/abstract correlate with the PQ scholar profiles.

When the Reviewer Discovery feature is enabled, then Editors who are selecting Reviewers for a submission will see a new "Reviewer Discovery from  ProQuest Community of Scholars" search option.




Reviewer Selection Summary - Submission CAROLINEDEV101-D-13-00004
Carla Christina, MD
"Betsy to demonstrate Reviewer Discovery"

[Author's Reviewer Preferences](#) [Manuscript Details](#) [Classifications](#) [Submit Editor's Decision and Comments](#)
[Search Similar Articles in MEDLINE](#) [View Submission](#)

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 1 [\[Change\]](#) review(s) have been completed.
Automatically un-invite Reviewers who do not respond to an invitation within 14 [\[Change\]](#) day(s). ([more...](#))
Automatically un-assign Reviewers who do not complete a review within 0 [\[Change\]](#) day(s) of the review due date. ([more...](#))

Reviewer Search

Search My Publication from
 Reviewer Discovery from  ProQuest Community of Scholars

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers
There are currently no Reviewers Invited for this submission.


When this option is selected and the 'Go' button is clicked, a search is automatically initiated against the ProQuest Community of Scholars database. A text message displays letting the Editor know that the search is being initiated.

Reviewer Selection Summary - Submission AmyTest-81-10-134
Maria Average Lopez
"10.0-61 Test 2:36"

[Manuscript Details](#) ▾ [Classifications](#)


[Search Similar Articles in MEDLINE](#) [View Submission](#)

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 0 [\[Change\]](#) review(s) have been completed.
Automatically un-invite Reviewers who do not respond to an invitation within 0 [\[Change\]](#) day(s). [\(more...\)](#)
Automatically un-assess Reviewers who do not complete a review within 3 [\[Change\]](#) day(s) of the review due date. [\(more...\)](#)

Contacting External Site: Please wait 

Reviewer Search

Search My Publication Search for Reviewers ▾ from All Reviewers ▾

Reviewer Discovery from  **ProQuest Community of Scholars**

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers

There are currently no Reviewers Invited for this submission.

A search is executed in the Pivot database, returning a result-set based on the PQ query. The result set displays on the *Reviewer Discovery Results* page (a maximum number of 100 records are returned). When results are returned, EM examines the list and identifies candidates (if any) that may be registered users in the publication. These Reviewer Candidates are displayed on the results page with information from the publication and information from the Pivot database, and a link to additional detailed information from the Pivot database. NOTE: Potential EM matches are displayed whether or not they have Reviewer roles in the publication, similar to searching the “entire database”.

The resulting records are displayed in one of three ways: A Pivot Candidate, a Candidate that is a potential match in the publication, or an unambiguously matched (Confirmed) publication user. NOTE: Upon initially using this new feature, there will not be any unambiguous matches. As Editors select records from the Pivot database, these users are proxy registered in the EM system and will appear as a “Confirmed EM Match” in subsequent searches.

Reviewer Candidates

Select a checkbox by each person you wish to select as a Reviewer ([more...](#)).

Select As				Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)		Invitation Statistics
Inv.	Asn.	Alt.	Prop.						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from Reviewer Discovery: John A. Land Hygiene and Epidemiology School of Medicine University of College Email1@College.edu Email2@University.edu	No		View Researcher Profile and Publications		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from Reviewer Discovery: <input type="checkbox"/> Use this Candidate Richard L. Kat Center for Health School of Medicine University of California rKat@trash.edu	No		View Researcher Profile and Publications		
				Possible EM Match: <input type="checkbox"/> Use this Candidate Richard F. Kat, MD FC Donders Institute of Ophthalmology (This person does not have a Reviewer Role in this publication)	No		Reviews in Progress: 0 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Last Review Completed: - Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0	Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Confirmed EM Match: James T. Rose, MD (Reviewer-OPH) Health & Science University	No		Reviews in Progress: 0 Completed Reviews: 5 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: Jan 04 2004 09:05PM Last Review Completed: Jan 08 2004 02:39PM Last Review Declined: Jan 03 2005 08:20PM Avg Days Outstanding: 4 Manuscript Rating: 77 Avg Review Rating: 0.0	Outstanding Invitations: 1 Agreed: 5 Declined: 9 Un-invited Before Agreeing: 1 Terminated: 0 Total Invitations: 16	
People Notes: RECORD MERGED Mar 29 2013 5:22PM									
(* indicates match between Reviewer and Manuscript Classifications)									

A record returned from the Pivot database that does not have a potential match found in the publication displays with the label “Information from Reviewer Discovery” in the “Reviewer Name” column. The “Reviewer Statistics” column displays a [View Researcher Profile and Publications](#) link. Clicking this link triggers a call to the Pivot database for additional details on this particular Reviewer, opening a popup window containing detailed information returned from Pivot.

The Editor can select a Reviewer Discovery candidate as Invited, Assigned, Alternate or Proposed using the existing “Select As” checkboxes. When one of these checkboxes is selected,

a red text message displays: “This Reviewer candidate will be proxy-registered when you click Proceed or perform another search.”

Select As				Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)	Invitation Statistics
Inv.	Asn.	Alt.	Prop.					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from Reviewer Discovery: John A. Land Hygiene and Epidemiology School of Medicine University of College Email1@College.edu Email2@University.edu	No		View Researcher Profile and Publications	

If the returned Pivot record has a possible EM match, one set of checkboxes are displayed in the “Select As” column, but two rows are displayed for this one user. The top row has the label “Information from Reviewer Discovery” with the Pivot-returned record (like the above described display). Beneath this is the EM registered user who is the “Possible EM Match:”, displaying the information from the publication that would normally display for Reviewer Candidates (including Reviewer Statistics if this user has a Reviewer Role). If this record does not have a Reviewer Role, the red message “(This person does not have a Reviewer Role in this publication)” is shown under their information.

If one of the “Select As” boxes is selected for this record, then a set of “Use this Candidate” checkboxes is enabled, one above each of the two names. A message appears prompting the Editor to select one of the candidates using the “Use this Candidate” checkboxes.

Select As				Reviewer Name	Board Member	Classifications	Reviewer Statistics (Agreed Invitations)	Invitation Statistics
Inv.	Asn.	Alt.	Prop.					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from Reviewer Discovery: <input type="checkbox"/> Use this Candidate Richard L. Kat Center for Health School of Medicine University of California rlkat@ucsf.edu	No		View Researcher Profile and Publications	
				Possible EM Match: <input type="checkbox"/> Use this Candidate Richard F. Kat, MD FC Donders Institute of Ophthalmology (This person does not have a Reviewer Role in this publication)	No		Reviews in Progress: 0 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Last Review Completed: - Last Review Declined: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0	Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0

When a Reviewer Discovery-returned candidate is selected, upon clicking the ‘Proceed’ button, that candidate is Proxy Registered “behind the scenes” in the Publication. NOTE: This ignores the “Proxy Register New Users” permission. No letters are sent to the user, however; it is anticipated that the Reviewer Invitation/Assignment letter would be sufficient notification to the user that they are now registered in the Publication.

When a candidate is selected, and that user does not currently have a Reviewer Role, the Editor is brought to the *Assign Reviewer Role* page where a Reviewer Role is assigned. NOTE: If the


publication is configured to “Automatically Assign Reviewer Role on Registration”, then this step is bypassed as the Reviewer Role is automatically assigned.

Once a Reviewer Role is assigned, the Editor navigates through the existing process where he can customize the Reviewer Invitation/Assignment/Alternate letter and send these notices. The new Reviewers selected using Reviewer Discovery will be asked to confirm their registration details upon login, as with existing Proxy registration functionality.

When users access the *People Information* pop-up page for a user that was registered from the PQ database, a new [View Researcher Profile and Publications](#) link displays. This link opens a new page that displays detailed information about this user from the PQ database.

People Information - James T. Rose, MD ▾	
Summary Statistics Detailed Statistics Similar Articles in MEDLINE View Researcher Profile and Publications	
<input type="button" value="Cancel"/> <input type="button" value="Save and Close"/>	
General Information	
Permanent Address: (Current Address)	Oregon Health & Science University North Andover, MA, 01845 UNITED STATES 555-555-1212 cswebber@ariessys.com
Secondary Information:	
People URLs:	None
Unavailable Dates:	None
Role:	Author, Reviewer-OPH
People Notes	

TO CONFIGURE:

To enable the Reviewer Discovery feature, contact your Aries representative. Once this feature is enabled, the new “Reviewer Discovery from  ProQuest Community of Scholars” search option is available for Editors with permission to Invite/Assign/Propose/select Alternate Reviewers.

Send Letters to Individual Reviewers

In EM v10.0, Editors may be given permission to send Ad Hoc letters to Reviewers on a submission. When the letter is sent, a copy goes to every Reviewer of the current revision of the submission that has been invited or assigned, has accepted the invitation, or submitted a review for the current revision. Reviewers who have declined or been un-invited do not receive letters.

New in EM v10.1, letters in the “Ad Hoc from Editor” letter family may now be configured to allow Editors to select which Reviewers will receive letters. When an Editor clicks the [Send E-mail](#) action link for a submission he may select from the list of available letters, and then he is brought to the *Customize Letter* page. When he selects a letter with the new “Display all Reviewers of the current revision so sender can select recipient(s)” Recipient option selected, the *Customize Letter* page now displays all Reviewers associated with the current revision of the submission. The list of Reviewers includes Reviewers with the following statuses:

- Review Complete
- Partial Review Saved
- Agreed to Review
- Reviewer Invited

Each Reviewer has a checkbox so the Editor may choose which Reviewer(s) will receive the letter. The Reviewer’s current status is also displayed to the right of his or her name (similar to the current display on *Details* and on *Reviewer Selection Summary* pages).

Customize Letter - Letter to Reviewers

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Cancel Preview and Send

From: "Mary Smith" <trash1@ariessc.com>

To: Reviewers of the current Revision:

- Robert Referee (Review Complete)
- Peter Reviewer (Partial Review Saved)
- Renaldo Reviewer (Reviewer Invited)

Letter Subject: Please Handle your Review

Letter Body: Insert Special Character Open in New Window

When the letter is sent, each selected Reviewer will receive the letter. These letters will be displayed in the *Correspondence History* for the submission.

TO CONFIGURE:

To allow Editors to send ad-hoc letters to individual Reviewers on a submission, go to PolicyManager, Edit Letters, and either [Edit](#) an existing letter or Add a new letter. Select the “Ad Hoc from Editor” letter family from the drop-down. On the configuration page, select/check the new “Display all Reviewers of the current revision so sender can select recipient(s)” Recipient option.

Add 'Ad Hoc From Editor' Letter

The Custom Instructions will display to the sender on the page where the letter is sent. To change them, make changes in the 'Custom Instructions' box and click the 'Save' button.

Cancel

Save

Custom Instructions:

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the

[View Default Instructions](#)

[Revert to Default Instructions](#)

Letter Purpose:

Letter to Reviewers

Subject:

Please Handle your Review

Letter Family:

Ad Hoc From Editor

Recipient:

"The DEMO Journal" trash1@ariessc.com

Corresponding Editor

Corresponding Production Editor

Display text box so sender can insert an e-mail address

Display the following e-mail address for the recipient:
(Multiple addresses may be entered, separated by a semicolon)

First Assigned Editor

Handling Editor

Editor who made the first Editor assignment

All Reviewers of the current revision of the submission

Display all Reviewers of the current revision so sender can select recipient(s)

Corresponding Author

Additional Recipients

Automatic CC and BCC on Decision Letters

In EM/PM v10.0, the ability to configure specific e-mail addresses that would be automatically cc'd and bcc'd when an e-mail is triggered in the system exists for some Letter Families, but not for others. This feature is available for letters in the “Ad Hoc” letter families, the “Enterprise Analytics Reporting” letter family, and the “Production” and “Production Reminder” letter families.

New in EM/PM v10.1, System Administrators may define one or more e-mail addresses to be automatically carbon copied or blind carbon copied for letters in the “Decision” letter family.

When a letter is configured with the new “Send Copies to the following addresses” option, then any e-mail addresses listed on the letter template will be sent either a carbon copy (CC) or blind carbon copy (BCC) of the e-mail letter.

Partial Decision Letter display:

Notify Author

Manuscript Number:
BETSYDEV92-D-12-00012

Title: This is an example

To finalize your decision and notify the author, use the 'Send Now' button.

If you wish to submit your decision to the next editor for review before the author is notified, use the 'Submit Decision without Notifying Author' button.

Cancel Submit Decision without Notifying Author

Preview Letter Save Save and Close Send Now

Editor Decision: Accept

Modify Decision: Accept

From: "The DEMO Journal" <trash1@ariessc.com>

To: Anthony Author

Letter Purpose: Editor Decision - Accept

Letter Subject: Your Submission

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: bcc:

Editors Assigned to Manuscript

<input type="checkbox"/>	<input type="checkbox"/>	Edward Editor (Editor-in-Chief)
<input type="checkbox"/>	<input type="checkbox"/>	Annie The Dog (Associate Editor)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	bhopkins@ariessc.com
<input checked="" type="checkbox"/>	<input type="checkbox"/>	demo@trash.com

cc:

bcc:

Letter Body: [Insert Special Character](#) [Open in New Window](#)

Ref: Ms No. BETSYDEV92-D-12-00012

TO CONFIGURE:

In PolicyManager, Edit Letters, select the letters in the Decision letter family to be modified with the new settings. Select the box next to the desired field (CC or BCC), and enter the e-mail address(es) to be copied on this letter when it is sent.

Edit 'Decision' Letter

Letter Purpose:
 Subject:
 Letter Family:

Sender's E-mail Address:

 "The DEMO Journal" <trash1@ariessc.com>

 Use Corresponding Editor's E-mail address

 Use Corresponding Production Editor's E-mail address

Additional Recipients

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

Automatically cc: bcc:

All Co-Authors
 Corresponding Editor
 Corresponding Production Editor

Send copies to the following addresses:
(Multiple addresses may be entered, separated by a semicolon)

cc:

bcc:

Allow choice on 'Send Letter' page: The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:

Display checkbox for co-Authors

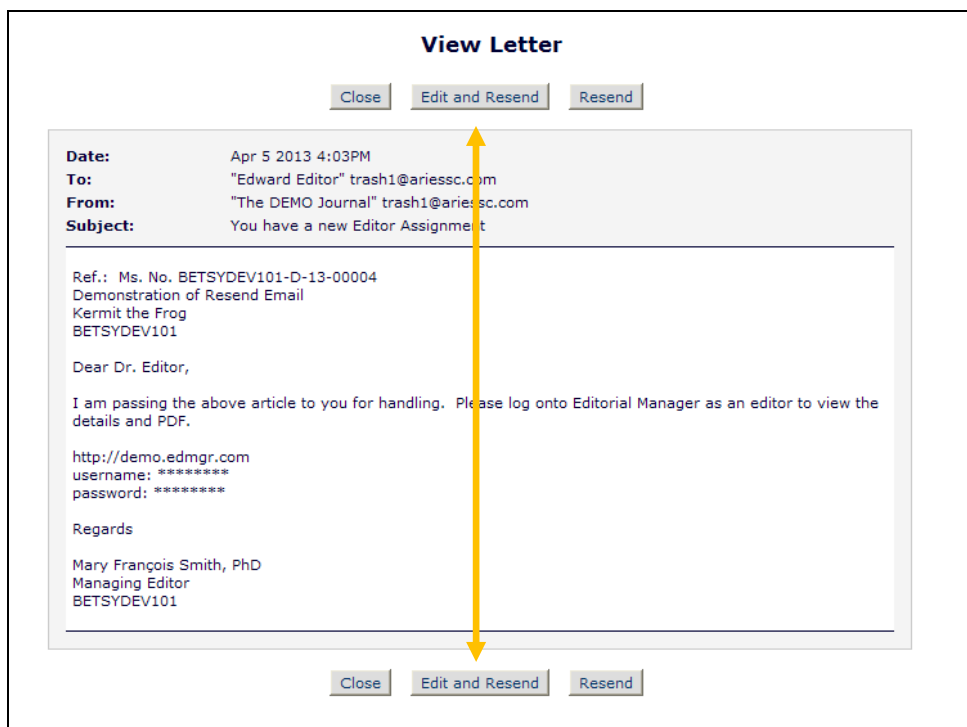
Letter Body:

NOTE: Multiple addresses must be separated by a semicolon (;).

Edit and Resend E-mail

In EM/PM v10.0, Editors with access to the *Correspondence History* for a submission may Resend any letter that has been sent by the system (this does not apply to External Correspondence). Resending an e-mail does not allow the user to make any changes to the letter or recipient.

New in EM/PM v10.1, Editor Roles may be given permission to “Edit Letter when Resending”. When an Editor has this permission enabled, a new set of buttons labeled “Edit and Resend” are displayed when viewing a letter from *Correspondence History*. NOTE: These buttons are not available for letters in the “Decision” family of letters.



When an Editor clicks one of these buttons, she will see a new *Edit and Resend* page. This page allows the Editor to:

- Elect to NOT resend the letter to the original Primary Recipient
- Add additional or alternate Primary Recipient e-mail addresses
- Add additional CC and BCC recipients of the letter
- Edit the Subject or Content of the letter
- Additionally, if the Editor has “Search People/Change E-mail Address” permission enabled, he will be able to edit the e-mail address of the Primary Recipient to which the letter will be resent

Edit and Resend Letter

Please note that merge fields cannot be populated during the resend process. Deep links will be regenerated and all previously merged fields will retain the merged text (as shown below), but newly added fields will not be merged into the letter.

From: "Mary Smith" <trash1@ariessc.com>

To: "Edward Editor" trash1@ariessc.com (Original Recipient) [Update User's Address](#)

Additional recipients can be added (separated by semicolons) but please note that in the letter sent to manually added recipients, deep links and username/password information will be replaced by asterisks.

Letter Subject:

If copies of the original letter were sent to additional recipients, they are listed below. You may add or remove recipients as desired. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:

bcc:

Letter Body: [Insert Special Character](#)

```

Ref.: Ms. No. BETSYDEV101-D-13-00004
Demonstration of Resend Email
Kermit the Frog
BETSYDEV101

Dear Dr. Editor,

I am passing the above article to you for handling. Please log onto
Editorial Manager as an editor to view the details and PDF.

http://demo.edmgr.com
username: %USERNAME%
password: %PASSWORD%

Regards

Mary François Smith, PhD
Managing Editor
BETSYDEV101

```

If the Editor unchecks/unselects the checkbox next to the name of the original Primary Recipient, at least one recipient needs to have been added in the available text box before clicking either 'Send' button.

Edit and Resend Letter

Please note that merge fields cannot be populated during the resend process. Deep links will be regenerated and all previously merged fields will retain the merged text (as shown below), but newly added fields will not be merged into the letter.

Please select or enter a primary recipient.

From: "Mary Smith" <trash1@ariessc.com>

To: "Edward Editor" EEditor@trash.com (Original Recipient) [Update User's Address](#)

Additional recipients can be added (separated by semicolons) but please note that in the letter sent to manually added recipients, deep links and username/password information will be replaced by asterisks.

Letter Subject: You have a new Editor Assignment

If a Primary Recipient has a user record in the publication, and the Editor has “Change E-mail Address” permission, he can update the original Primary Recipient’s e-mail address by clicking the [Update User’s Address](#) link. NOTE: This will update the e-mail address on the user’s people record, not just for resending the letter. Clicking the link presents a warning to the user notifying them this will change the user’s e-mail address. Clicking ‘OK’ on the warning opens an editable text field on the page. The Editor may edit the existing address, or add additional addresses if appropriate. If the user’s record already has multiple addresses, they are each displayed on a separate row.

Edit and Resend Letter

Please note that merge fields cannot be populated during the resend process. Deep links will be regenerated and all previously merged fields will retain the merged text (as shown below), but newly added fields will not be merged into the letter.

From: "Mary Smith" <trash1@ariessc.com>

To: "Edward Editor" trash1@ariessc.com

When the edits are done, the Editor clicks the [Save](#) link to change the address, or [Cancel](#) link to cancel out of the edit process for the e-mail address.

Edit and Resend Letter

Please note that merge fields cannot be populated during the resend process. Deep links will be regenerated and all previously merged fields will retain the merged text (as shown below), but newly added fields will not be merged into the letter.

From: "Mary Smith" <trash1@ariessc.com>

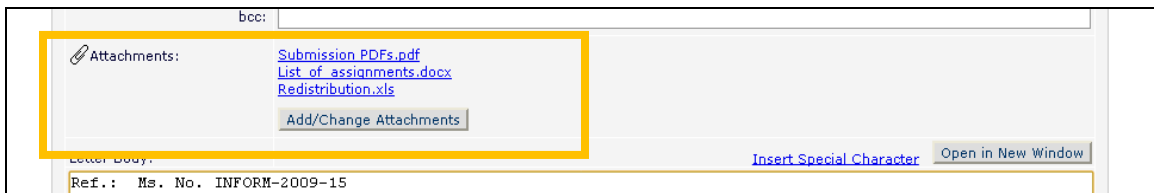
To: "Edward Editor" EEditor@trash.com (Original Recipient) [Update User's Address](#)

Additional recipients can be added (separated by semicolons) but please note that in the letter sent to manually added recipients, deep links and username/password information

The text of the originally sent letter populates the letter body of the page. Any merge fields that were included in the letter sent out are not re-processed; the information that was sent in the letter (such as due dates or other submission-related information) is displayed as the text that was originally sent with the following exceptions.

1. Deep links:
 - a. For the previous primary recipient (selected via the checkbox), any Deep Link merge field is regenerated when the letter is resent (if the recipient has a user record in the publication)
 - b. For manually added primary recipients and for all secondary recipients, any Deep Link is replaced with asterisks in the letter
2. Sensitive merge fields – i.e. %USERNAME%, %PASSWORD%, %BLINDED_USERNAME% and %BLINDED_PASSWORD%
 - a. For the previous primary recipient (selected via the checkbox), these merge fields are populated with the appropriate **current** information (if the recipient has a user record in the publication)
 - b. For manually added primary recipients and for all secondary recipients, the merge fields are replaced with asterisks in the letter

If the originally sent letter was sent with any Attachments, these will be included again unless the Editor clicks the ‘Add/Change Attachments’ button displayed under the list of attachment on the *Edit and Resend* page.



When the Editor is done editing the letter, he clicks either ‘Send’ button (located above and below the letter). This instance of the letter being sent is added to the *Correspondence History* for this submission.

TO CONFIGURE:

To allow Editors to Edit and resend letters, go to RoleManager and select the Editor roles you wish to have this permission. Select/check the new “Edit Letter when Resending” permission in the General Searching and Viewing section. This new permission is a sub-permission of the existing “View Editorial Correspondence History” permission; letters can only be edited and resent from the *Correspondence History* page. NOTE: To update the user’s address from the *Edit and Resend* page, the Editor must also have “Search People” permission and “Change E-mail Address” sub-permission enabled.

Edit Role Definition

Role Name:*

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. By holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking in the lists of decision terms, you may select or deselect multiple terms.

[Expand All](#)

[Collapse All](#)

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- System Conversion Tasks
- General Searching and Viewing
 - Use Editorial Details Layout:
 - 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
 - View COS Scholar Universe Author Profiles
 - Search Similar Articles in MEDLINE
 - Search Author Publications in MEDLINE
 - Initiate Similarity Check
 - View Similarity Check Results
 - Bibliographic Search
 - AuthorMapper (with first initial at end)
 - Author Mapper (LASTNAME)
 - View Editorial Status History
 - View Submission Production Status History
 - View Submission Production Task Assignment History
 - View Schedule Group Production Task Assignment History
 - View Editorial Correspondence History
 - Edit Letter when Resending
 - View Submission Production Correspondence History

NOTE: This new sub-permission is not enabled/selected upon upgrade to v10.1.

Multiple Discussion Topics

In EM/PM v10.0, Editors may be given permission to Initiate Discussions on submissions parallel to the peer-review workflow. Any Editor may be invited to participate in a Discussion. When a Discussion is complete, the discussion may be closed. If an Editor wishes to initiate a second Discussion for a submission, the existing discussion must be re-opened, and a different list of Editors may be selected as participants. Publications cannot easily distinguish where one discussion topic and the next one begins. It is also cumbersome for participants to have to “sift through” other comments that may not necessarily pertain to the current discussion.

New in EM/PM v10.1, publications may now open multiple discussion topics for a single submission. This allows multiple, simultaneous Discussions with different topics and different participants to be going on at the same time on the same submission. Editors only see discussion topics they are authorized to access, as determined by RoleManager permissions and whether the Editor is a participant in the particular discussion topic.

As in v10.0, Editors with “Initiate and Manage Discussions” permission (renamed in v10.1) will see an Initiate Discussion link in various folders and on *Details* for submissions where no discussion topics are associated with the submission (open or closed).

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 1 (6 total submissions) Display 500 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Details Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Classifications Set Final Disposition Initiate Production AuthorMapper WFIAE Author Mapper LASTNAME Send E-mail Linked Submissions		Perspective		Checking on corr auth changes	Edward Editor, MD	Jan 21 2013 12:15PM	Jan 21 2013 12:15PM	Received by Journal

If the logged in Editor is a participant in an open discussion topic, or has permission to “View All Discussions”, and/or has permission to “Initiate and Manage Discussions” (either All Discussions, or My Discussions Only and he initiated a discussion topic for this submission), and there is at least one topic the logged in user is authorized to access, the Editor will see the Discussions link (renamed in v10.1 to reflect multiple discussion topics).

Submissions with Active Discussions

Page: 1 of 1 (4 total submissions) Display 10 results per page.

Action	Manuscript Number	Article Type	Article Title	Corresponding Author	Topic	Date of Last Post	Date Discussion Started	Discussion Initiator	Editorial Status Date	Current Editorial Status
Discussions View Submission View Draft Decision Letter Details Go to Submission Send E-mail	BETSYDEV92-D-12-00011	Original Study	Testing Files	Terry Francona	To Reject or to Not Reject	Apr 10 2013 10:16AM	Apr 10 2013 10:16AM	Mary François Smith, PhD	Jun 01 2012 11:24AM	Decision in Process

When an Editor is a participant in one discussion topic for a submission, but does not have either “View All Discussions” or “Initiate and Manage Discussions” permission, the Discussions link

opens the *Discussion* page where she can enter a post and read other posts on this discussion topic.

Sample page; this discussion does not have a Topic Name defined:

Discussion for Manuscript Number: BETSYDEV92-D-12-00012
Anthony Author, MD
"This is an example"

Please discuss. Be aware people can read this.

[View Submission](#) [View Reviews and Comments](#) [Details](#)

Editor can type a posting here.

Participant	Comments	Date
Edward Editor, MD	Showing the new feature	Oct 02 2012 03:45PM

Editors with permission to “View All Discussions” and/or “Initiate and Manage Discussions”, or Editors who are participants in more than one discussion for a particular submission are brought to a new *Discussions* page upon clicking the [Discussions](#) link. This page displays a list of the discussion topics associated with the submission.

If the Editor only has permission to “View All Discussions”, or has no “View” or “Manage” permission but is a participant in the Discussion, he can click the [View](#) link for a discussion topic to access the *Discussion* page for that discussion topic, and if he is a participant he may post a comment.

Discussions for Manuscript Number: BETSYDEV92-D-12-00011
Terry Francona
"Testing Files"

Action	Topic	Last Post Date	Posted By	Discussion Status	Date initiated	Initiated By
View	To Reject or to Not Reject	Apr 10 2013 10:16AM	Mary François Smith, PhD	Open	Apr 10 2013 10:16AM	Mary François Smith, PhD
View	A Second Thread	Apr 11 2013 10:23AM	Mary François Smith, PhD	Open	Apr 11 2013 10:23AM	Mary François Smith, PhD

If the Editor has “Initiate and Manage Discussions” permission, this page also has a new ‘Start New Topic’ button. This button allows the Editor to start a new discussion topic for this submission. He can also click the [View](#) link for any discussion topic to view or manage that discussion (depending on the “My Discussions Only” or “All Discussions” sub-permission).

Only one topic; Editor can start a new topic from this page:

Discussions for Manuscript Number: BETSYDEV92-D-12-00011
Terry Francona
"Testing Files"

Action	Topic	Last Post Date	Posted By	Discussion Status	Date initiated	Initiated By
View	To Reject or to Not Reject	Apr 10 2013 10:16AM	Mary François Smith, PhD	Open	Apr 10 2013 10:16AM	Mary François Smith, PhD

When the ‘Start New Topic’ button is clicked, the Editor is brought to the *Initiate Discussion* page. This page now has a new “Topic” field where Editors can enter a Topic name for this discussion to help differentiate between discussion topics for a submission. The Topic name can be no more than 200 characters, and is an optional field. The Topic name may also be pre-populated if the Publication is using Topic Templates (see the “Discussion Topic Templates” section of these Release Notes for more information). NOTE: EM will allow the same Topic name to be used on multiple discussion threads to allow multiple discussions with the same topic, such as “Suggest Reviewers” (for example). This allows two sets of discussions to have the same purpose, while keeping discussion participant responses separated. Editors will be warned if there is a duplicate name, but they will not be prevented from using a duplicate Topic name.

Initiate Discussion for Manuscript Number: BETSYDEV92-D-12-00011
Terry Francona
"Testing Files"

Topic

Initial Comments

Page: 1 of 2 (18 total candidates) 1 >>> >| Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	View Reviews and Comments	Download Files(source and companion)	View Draft Decision Letter	# Classification Matches	Classification Matches	Available during next 30 days
<input type="checkbox"/>	Amsterdam Handling Editor	Hermione Grainger	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Artwork Editor	Four T. Editor, none	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Artwork Editor	Jack Lavelle	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Associate Editor	Anthony Author, MD	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Associate Editor (This editor is already assigned to the current submission)	Annie The Dog, PhD	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Associate Editor	Smith, Editor, MD	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes

A new set of columns display in the *Submissions with Active Discussions* folder to provide more discussion information to the user; Topic, Date of Last Post, Date Discussion Started, and Discussion Initiator (these new columns are not sortable). When a Submission has multiple discussion topics that an Editor may view or participate in, all topics will display for the

submission. NOTE: The “Topic” column may be blank if no topic name has been entered for a discussion.

Submissions with Active Discussions										
Page: 1 of 1 (4 total submissions)					Display 10 results per page.					
Action	Manuscript Number	Article Type	Article Title	Corresponding Author	Topic	Date of Last Post	Date Discussion Started	Discussion Initiator	Editorial Status Date	Current Editorial Status
Discussions View Submission Details Go to Submission Send E-mail	BETSYDEV92-D-12-00011	Original Study	Testing Files	Terry Francona	To Reject or to Not Reject A Second Thread	Apr 10 2013 10:16AM Apr 11 2013 10:23AM	Apr 10 2013 10:16AM Apr 11 2013 10:23AM	Mary François Smith, PhD Mary François Smith, PhD	Apr 01 2012 11:24AM	Decision in Process

To accommodate the new Multiple Discussion Topics functionality, a new merge field is added to v10.1. The new merge field, **%INITIAL_DISCUSSION_POST%**, can be used for letters in the Discussion Forum letter family. This merge field will always populate with the initial post in the discussion topic for which the letter is sent. The existing **%DISCUSSION_POST%** merge field continues to be available for pulling in the most recent post in a discussion topic for which the letter is sent.

TO CONFIGURE:

No specific configurations are required to allow the use of Multiple Discussion Topics. On upgrade to v10.1, the existing Discussion Forum permissions are renamed and enhanced to allow more precise managing capability with this new functionality.

- The existing “View All Discussions” permission remains unchanged on upgrade. Editors with this permission can view all discussions – both open and concluded – for submissions he has access to in the system. NOTE: The *Submissions with Active Discussions* folder only displays discussions in which the Editor is a participant or initiator.
- The existing “Manage Discussions” permission is renamed “Initiate and Manage Discussions”. Additional sub-options are added to this permission to allow for restrictions on which Editors can manage which discussions.
 - “My Discussions Only” – Editor roles with this option may initiate a discussion on any submission to which they have access, but they may only add participants, change participant permissions, post a comment, close a discussion topic or re-open a discussion topic for discussion topics they have initiated.
 - “All Discussions” – This option is equivalent to the prior “Manage Discussions” permission. Editor roles with this permission are able to Initiate Discussions, post a comment in any discussion, add participants to any discussion, change participant permissions in any discussion, close any discussion, or re-open any discussion.

Edit Role Definition

Role Name:*

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. By holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking in the lists of decision terms, you may select or deselect multiple terms.

[Expand All](#)

[Collapse All](#)

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- System Conversion Tasks
- General Searching and Viewing

- Edit Submission
- Discussion Forums
 - View All Discussions
 - Initiate and Manage Discussions
 - My Discussions Only
 - All Discussions

- Transmittal Form
- Sending E-mail

Discussion Topic Templates

New in EM/PM v10.1, Editors may now simultaneously create multiple Discussion Topics for a single submission. Each discussion may have a different purpose. Some Publications may wish to provide Editors with default information as the starting point for discussions. New in EM/PM v10.1, Publications may configure Topic Templates to be used by Editors as a starting point for creating a new Discussion Topic. Creating Topic Templates can be useful for simplifying the discussion initiation process, providing a set of topics to “standardize” discussions and reduce the need to re-type information that is used for frequent discussions.

When Discussion Topic Templates have been created for a publication, then when an Editor with “Initiate and Manage Discussions” permission chooses to start a new discussion, a new “Choose Topic Template” drop down menu displays on the *Initiate Discussion* page. The Editor may choose a Topic Template, or enter their own Topic and Initial Comments.

NOTE: If the publication does not create multiple Topic Templates, there will be no drop down menu displayed. The page will display with information from the default template, either a blank Topic box, or pre-populated with the information entered on the single configured Template.

Initiate Discussion for Manuscript Number: DEMO-100-4
Daisey Duke, PhD
"This is a required title"

Choose Topic Template:

Topic

Initial Comments

Manuscript Classifications
(1) ANATOMY ; (2) anterior segment ; (3) posterior segment ; (4) lids ; (5) orbit ; (6) Growth & Development

Publications may configure the Discussion Forums to require that Editors select a Topic Template. This is useful for managing the types of discussions that can be created for submissions. When this is required, the “Choose Topic Template” text displays in red text with an asterisk to denote the requirement. The “Topic” and “Initial Comments” fields are not available until a Topic Template is selected.

Initiate Discussion for Manuscript Number: DEMO-100-4
Daisey Duke, PhD
"This is a required title"

Choose Topic Template*:

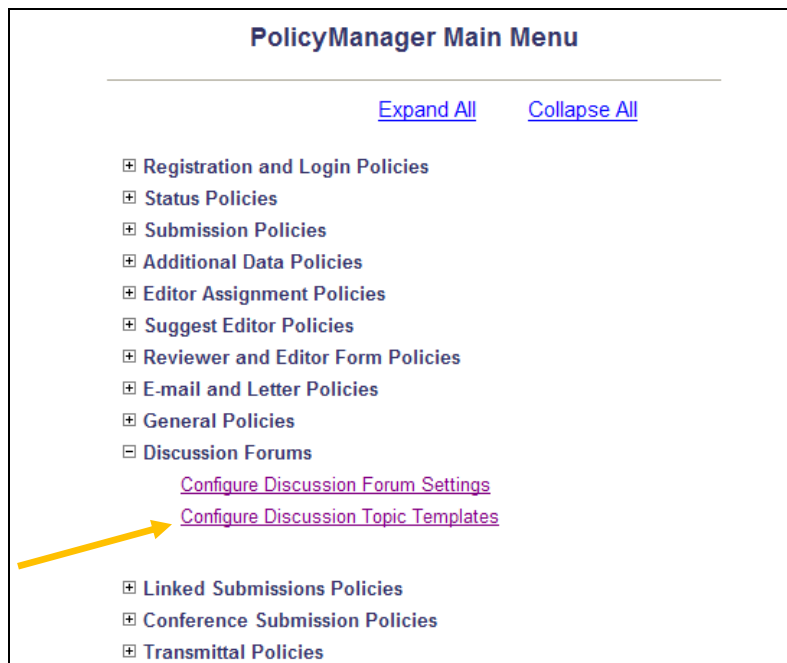
Manuscript Classifications

(1) ANATOMY ; (2) anterior segment ; (3) posterior segment ; (4) lids ; (5) orbit ; (6) Growth & Development

Within the Topic Template configuration, administrators may enter template-specific instructions, a default Topic Name, and a default set of Initial Comments. Initial Comments are always required for starting a Discussion. Editors may be allowed to edit either of these fields when using a template, or the template may be configured such that the default text (for either Topic or Initial Comments or both) cannot be edited.

TO CONFIGURE:

On upgrade to v10.1, every site has a “Default Topic Template” created. If the publication does not wish to use the Topic Template feature, you can just leave the default template as is; the *Initiate Discussion* page will continue to work as it does in v10.0. To create additional Topic Templates, or to add additional default information (such as a Topic name or Instructions) to the Default Topic Template, go to PolicyManager and click the new Configure Discussion Topic Templates link in the new “Discussion Forums” section.



If the publication does wish to create more templates for Editors to choose from, click either ‘Add’ button on the page. You can also Edit the Default Topic Template to add additional default information if desired.

Configure Discussion Topic Templates

Listed below are the Discussion Topic Templates configured for your publication. To create a new template, click the 'Add' button. When more than one Discussion Topic Template has been created, discussion initiators can choose a template from a drop-down list to pre-populate the Initiate Discussion page. You may also specify for each template whether or not the user is allowed to change the Topic Name and/or Initial Comments. This configuration is done on the Add / Edit Discussion Template page for each template created. ([less...](#))

Require Editors to choose a Discussion Topic Template on the Initiate Discussion page. If this checkbox is not selected, users can either type in a Topic and Initial Comment, or select a Topic template to pre-populate the Topic and Initial Comments boxes.

[Save Changes](#)

[Add](#)

Order	Description	Actions
1	Default Topic Template	Edit

[Update Order](#)

[Add](#)

[Configure Discussion Forum Settings](#)
[Back to PolicyManager](#)

NOTE: All sites must have at least one active Topic Template, even if no additional configuration is used.

Clicking the 'Add' button opens a new *Add Discussion Topic Template* page. On the *Add/Edit Discussion Topic Template* page, you may enter information that will be pre-populated when this Topic template is selected on the *Initiate Discussion* page.

- Discussion Topic Template Name – this is the Topic name that will display in the “Choose Topic Template” drop-down on the *Initiate Discussion* page. The Topic Template Name can be no more than 200 characters.
- ‘Initiate Discussion’ Page Custom Instructions – these custom instructions will appear on the *Initiate Discussion* page when the Initiator selects this particular template
- Topic – this text pre-populates the “Topic” field on the *Initiate Discussion* page. This field may be left blank if the publication does not wish to use Topic names. NOTE: If the publication plans to use multiple discussion topic capabilities on a regular basis, it is recommended you create multiple templates with different Topic names to differentiate between the multiple discussion threads.
 - Below this field is a checkbox labeled “Allow user to modify Topic name when initiating a discussion”. If this option is unchecked/deselected, then the text entered in the “Topic” field will be displayed as not editable to the Editor initiating the Discussion.
- Initial Comments – this text pre-populates the initial comments of a Discussion. Initial comments are required to begin a Discussion.
 - Below this field is a checkbox labeled “Allow user to modify Initial Comments when initiating a discussion”. If this option is unchecked/deselected, then the text entered in the “Initial Comments” field will be displayed as not editable to the Editor initiating the Discussion.

Edit Discussion Topic Template

Below you may enter the text that will be pre-populated on the Initiate Discussion page when users select this template. All of this text is optional; you are not required to enter anything in these fields. If you enter text for Topic and/or Initial Comments and do not want users to modify these fields on the Initiate Discussion page, select the appropriate checkboxes below. ([less...](#))

Discussion Topic Template Name	<input type="text" value="Default Topic Template"/> Insert Special Character
'Initiate Discussion' Page Custom Instructions	<input type="text"/>
Topic	<input type="text"/> <input checked="" type="checkbox"/> Allow user to modify Topic name when initiating a discussion
Initial Comments	<input type="text"/> <input checked="" type="checkbox"/> Allow user to modify Initial Comments when initiating a discussion

When more than one Discussion Topic template is configured, you may “Hide” a template on the *Edit Discussion Topic Template* page. Hidden templates display on the *Configure Discussion Topic Templates* page below the list of active templates.

When more than one Discussion Topic Template is configured, then you may Remove unwanted templates. Removing a template will not impact any Discussions that have been started with this Topic Template; it will only remove the Topic Template from the list of available Topic Templates that Editors may choose going forward. NOTE: The Remove link is not available if there is only one active Topic Template configured.

To require that Editors choose a Discussion Topic Template when Initiating a Discussion, select/check the “Require” option above the list of configured Topic Templates. Be sure to click the ‘Save Changes’ button to commit this option before leaving the page. NOTE: If there is only one template configured, the “Choose Topic Template” drop-down is not displayed on the *Initiate Discussion* page.

Configure Discussion Topic Templates

Listed below are the Discussion Topic Templates configured for your publication. To create a new template, click the 'Add' button. ([more...](#))

Require Editors to choose a Discussion Topic Template on the Initiate Discussion page. If this checkbox is not selected, users can either type in a Topic and Initial Comment, or select a Topic template to pre-populate the Topic and Initial Comments boxes.

[Save Changes](#)

[Add](#)

Order	Description	Actions
<input type="text" value="1"/>	Default Topic Template	Remove Edit
<input type="text" value="2"/>	Secondary Discussion Template	Remove Edit

[Update Order](#)

Another template (Hidden)

[Remove](#) [Edit](#)

[Add](#)

[Configure Discussion Forum Settings](#)

[Back to PolicyManager](#)

Allow Editors to View Draft Decision Letter in Discussions

In EM v10.0, publications may use the “Discussion Forum” feature to allow Discussions among Editors in the system, outside of the peer review workflow. When an Editor (with proper permission) initiates, re-opens, or adds participants to a discussion, he decides if each participant should be given access to “Download Files” associated with the submission or to “View Reviews and Comments” associated with a submission. Publications may configure the Discussion Forum Settings so that either or both of these options are always selected by default when each new participant is selected.

New in EM v10.1, Editors are given the option to allow Discussion Participants to “View Draft Decision Letter”. This option may be configured on the Discussion Forum Settings to also be always selected by default when each new participant is selected. Editors may then choose to disable this option manually for individual participants at the time of initiation, re-opening, or adding new participants.

When Editors have permission to View the Draft Decision Letter when participating in a Discussion Topic for a submission, then when a Draft Decision Letter has been saved during a decision process, Editors participating in that discussion will see a new [View Draft Decision Letter](#) link on the *Discussion* page.

Discussion for Manuscript Number: BETSYDEV92-D-12-00011
Terry Francona
"Testing Files"

Please discuss. Be aware people can read this.

[View Submission](#) [View Reviews and Comments](#) **[View Draft Decision Letter](#)** [Details](#)

Topic: To Reject or to Not Reject [Close](#) [View/Print All](#)

Participant	Comments	Date
Mary François Smith, PhD	Please review the letter and make comments here.	Apr 10 2013 10:16AM

[Post](#)

[Close](#)

A [View Draft Decision Letter](#) is also available to those Editors with permission in the *Submissions with Active Discussions* folder if a draft letter is available to view.

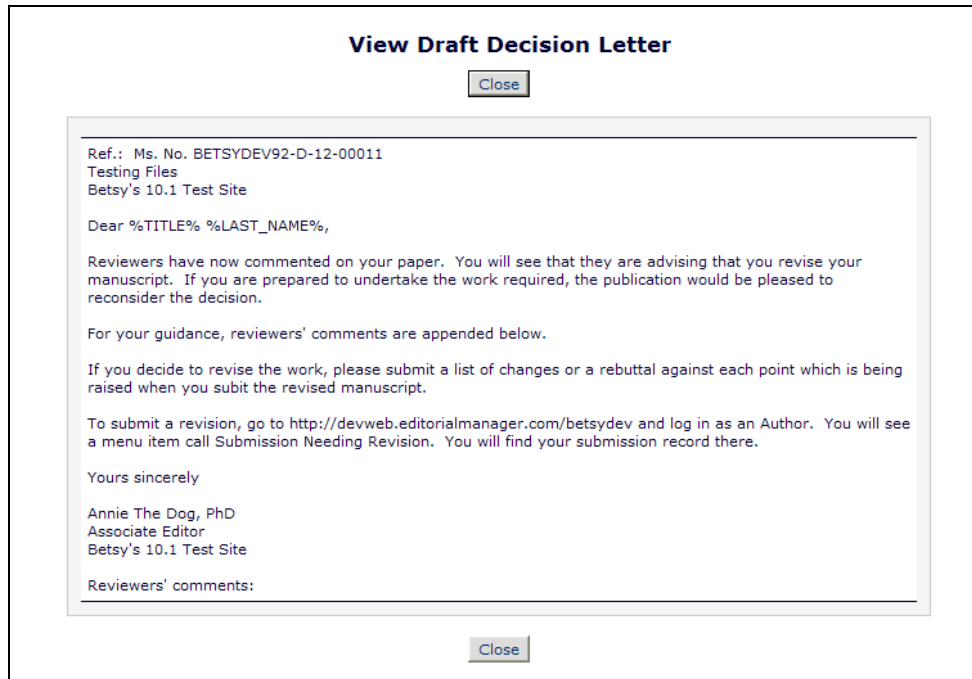
Submissions with Active Discussions

Page: 1 of 1 (5 total submissions) Display 10 results per page.

Action	Manuscript Number	Article Type	Article Title	Corresponding Author	Topic	Date of Last Post	Date Discussion Started	Discussion Initiator	Editorial Status Date	Current Editorial Status
Discussions View Submission View Draft Decision Letter Details Go to Submission Send E-mail	BETSYDEV92-D-12-00011	Original Study	Testing Files	Terry Francona	To Reject or Not to Reject	Apr 10 2013 10:16AM	Apr 10 2013 10:16AM	Mary François Smith, PhD	Jun 01 2012 11:24AM	Decision in Process

Clicking this link from either place opens a Read Only version of the saved Draft Decision letter. The Editor can then make any comments in the Discussion Topic, such as recommendations on the content of the letter, etc.

NOTE: The link is only available as long as the Decision Letter is in “Draft”. This link no longer displays when the letter has been sent to the Author.



TO CONFIGURE:

Go to PolicyManager, and click the Configure Discussion Forum Settings link in the “Discussion Forums” section. The new “View Draft Decision Letter” option setting is located in the “Default Participant Permissions” section. Select/check the box for this option on this page to have the corresponding “View Draft Decision Letter” box automatically checked by default when adding participants to a discussion.

Partial page displayed; new settings shown

Configure Discussion Forum Settings

Custom Instructions

Enter any instructions that you would like to appear on the Discussion page.

[Insert Special Character](#)

These are the custom instructions for the Discussion Forum.

Default Participant Permissions

Select the checkboxes below if you want the permissions to be automatically selected by default when an Editor is asked to participate in a discussion. Note that discussion initiators can manually select/de-select these permissions on the Initiate Discussion, Add Participants and Re-Open Discussion pages for individual Editors as needed. The settings below simply determine whether the permission checkboxes are selected or unselected by default on the page.

- View Reviews and Comments
- Download Files (source and companion)
- View Draft Decision Letters

NOTE: The new option is not selected/checked on upgrade to v10.1.

Search for Discussions in Search Submissions

To support the enhanced Discussion Forum features available in v10.1, users may now use a set of new Search Criterion related to Discussions when using the Search Submissions feature.

There are 11 new items in the Criterion drop-down menu:

1. Discussion Topic
2. Discussion Comments
3. Date Discussion Topic Initiated
4. Discussion Topic Initiator First Name
5. Discussion Topic Initiator Last Name
6. Last Discussion Topic Post Date
7. Discussion Topic Posted By First Name
8. Discussion Topic Posted By Last Name
9. Discussion Status (Open or Closed) – When the user selects this option from the Criterion drop-down list, the page is refreshed and the Value is updated to reflect a drop-down choice of “Open” (Active) or “Closed” (Concluded).
10. Discussion Participant First Name – The person has not necessarily posted a comment, but he was asked to participate in the discussion.
11. Discussion Participant Last Name – The person has not necessarily posted a comment, but he was asked to participate in the discussion.

NOTE: These new discussion fields are only displayed in *Search Submissions* criterion if at least one Editor Role in the publication has “Initiate and Manage Discussions” permission enabled.

The Discussion fields are not added to the *Search Submissions Results* page, however, the Discussions link is added to the *Search Submissions Results* page for users with permission to see this action link.

Is not	Selector	Value
Is	Contains	

TO CONFIGURE:

No special configuration is required for these search items to be available. If your publication is using the Discussion Forums feature (determined by at least one Editor Role having “Initiate and Manage Discussions” permission enabled), these new search options are available in *Search Submissions*.

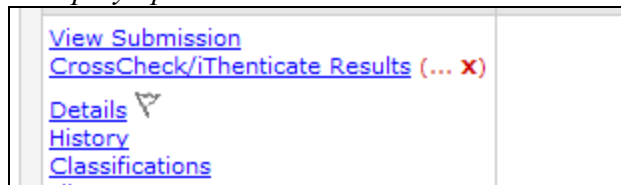
CrossCheck/iThenticate Display Enhancements

In EM/PM v10.0, CrossRef members who have agreed to participate in the CrossCheck plagiarism detection service may see a [CrossCheck/iThenticate Results](#) link in some folders and on *File Inventory* (for Editors with “View Similarity Check Results” permission enabled) for submissions where files have been sent to CrossCheck using automatic transfer. The maximum Similarity Score value associated with the submission displays if that score exceeds a configured threshold value (configured in PolicyManager).

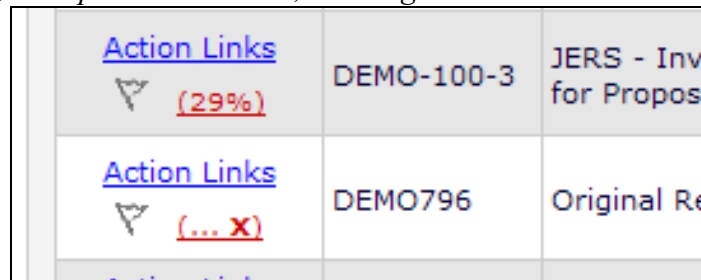
New in EM/PM v10.1, this feature is enhanced to display additional information next to the [CrossCheck/iThenticate Results](#) link. In addition to the highest Similarity Score being displayed in parenthesis, the following results may display:

- If at least one file for the submission has been deposited to CrossCheck and the most recent deposit for that file has not yet returned results (i.e. the most recent Similarity Check History record for that file has either “Pending” or “In Process” as its status), an ellipsis “...” displays.
- If at least one file for the submission has been deposited to CrossCheck but no CrossCheck report was returned (i.e. the most recent Similarity Check History record for that file has the status “Error” or the status “Timed Out”), then a bold uppercase letter “X” displays.

Partial page display; new display options next to link:



Partial page display; collapsed action links, showing CrossCheck Status Summary:



A screenshot of a table with two rows. Each row has a 'Action Links' column with a dropdown arrow and a percentage or status indicator, a submission ID column, and a description column.

Action Links ▼ (29%)	DEMO-100-3	JERS - Inv for Proposa
Action Links ▼ (... X)	DEMO796	Original Re

The functionality for the “Ignore Score” feature on the *CrossCheck/iThenticate Results* page is enhanced in conjunction with the new display options. New in EM/PM v10.1, Editors can now use the “Ignore Score” feature to ignore any record when displaying the “CrossCheck Status Summary”; this way Editors may choose to not display pending items, or items where an error occurred in transfer.

Sample page displayed; "Ignore Score" checkboxes are all available for selection:

CrossCheck/iThenticate Results - Submission DEMO796
"Prevention Program in Orthopedic Setting"

The results from each file deposited with CrossCheck/iThenticate from this submission are listed below. The 'Score' value is the overall Similarity Score returned by CrossCheck/iThenticate when the report is completed; click on the 'Completed' status link to view the full Similarity Report from CrossCheck/iThenticate.

The largest Score value will be displayed as the overall Similarity Score for the submission, unless the associated 'Ignore Score' checkbox is set/enabled.

[File Inventory](#)

CrossCheck/iThenticate History

Date:	Rev.	Triggered By	File Sent	Report Status	Score	Ignore Score
Mar 28 2012 10:16AM	0	New Submission	DEMO91-S-12-00014.pdf	Error	0	<input checked="" type="checkbox"/>
Mar 28 2012 10:21AM	0	Mary François Smith, Managing Editor	9.0-42_cosmetic.docx	Error	0	<input checked="" type="checkbox"/>
Mar 28 2012 10:21AM	0	Mary François Smith, Managing Editor	Dummy Manuscript for iThenticate.docx	Error	0	<input checked="" type="checkbox"/>
Mar 28 2012 10:36AM	0	Mary François Smith, Managing Editor	9.0-42_cosmetic.docx	Pending	0	<input type="checkbox"/>
Mar 28 2012 10:36AM	0	Mary François Smith, Managing Editor	Dummy Manuscript for iThenticate.docx	Pending	0	<input checked="" type="checkbox"/>

[Close](#)

TO CONFIGURE:

No additional configuration is required for publications already configured to use the automatic deposit to CrossCheck feature.

To enable CrossCheck for your publication, contact your Aries Account Coordinator.

CrossCheck/iThenticate Link Display Options

In EM/PM v10.0, CrossRef members who have agreed to participate in the CrossCheck plagiarism detection service may see a [CrossCheck/iThenticate Results](#) link for submissions where files have been sent to CrossCheck using automatic transfer. The link appears in a few Editor folders and on *File Inventory* (for Editors with “View Similarity Check Results” permission enabled).

New in EM/PM v10.1, this link now displays to Editors in the following additional folders:

- Group by Editors I Assigned
- Group by Editor with Current Responsibility
- Group by Manuscript Status
- Submissions Out for Revision
- My Assignments with Final Disposition
- All Submissions with Final Disposition (including subfolders)

NOTE: When a submission is in the *Submissions Out for Revision* folder, if an Author has started to revise the submission, the Editor will *not* have the ability to automatically transfer submissions to CrossCheck; this is to ensure the Editor does not transfer outdated or obsolete files while the submissions is undergoing revision by the Author.

TO CONFIGURE:

No configuration required. Publications configured to use the automated CrossCheck feature, and users with the “View Similarity Check Results” permission enabled will see the link in these folders when it is available.

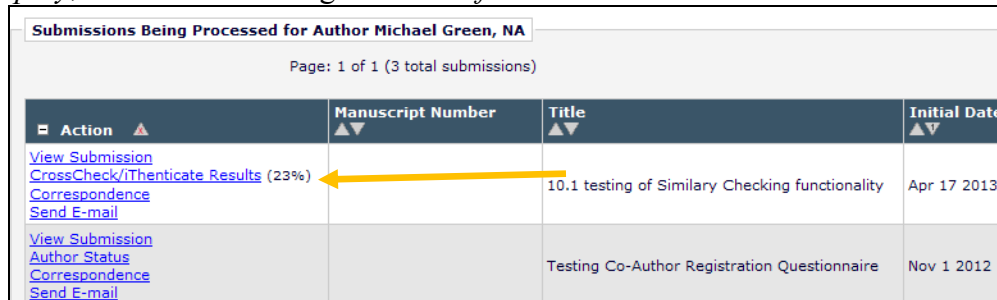
To enable CrossCheck for your publication, contact your Aries Account Coordinator.

Authors May View Similarity Check Results

In EM v10.0, Editor and Publisher roles with the proper permission may view the CrossCheck similarity reports for submissions. In some situations, Authors may benefit from viewing these results, and may be able to use the information to make amendments and modifications to submissions.

New in EM v10.1, Authors may now be given access to the “View Only” version of Similarity Reports for submissions that have been deposited to CrossCheck. When the Reviewer PDF for a submission has been sent to CrossCheck and the similarity report has been completed, then Authors with the new “View Similarity Check Results” permission enabled will see the CrossCheck/iThenticate Results Action Link for the submission. The Score of the report displays next to the link, as well as the revision number of the PDF that was submitted (if the PDF is for Rev 1 or higher).

Partial display; Submissions Being Processed folder:



Submissions Being Processed for Author Michael Green, NA			
Page: 1 of 1 (3 total submissions)			
Action ▲	Manuscript Number ▲▼	Title ▲▼	Initial Date ▲▼
View Submission CrossCheck/iThenticate Results (23%) Correspondence Send E-mail		10.1 testing of Similary Checking functionality	Apr 17 2013
View Submission Author Status Correspondence Send E-mail		Testing Co-Author Registration Questionnaire	Nov 1 2012

Clicking the link will open the Similarity Report for this submission in a new window. The Author will be able to read the information, but is not logged into the publication’s iThenticate account; they are only viewing the report results.

Sample Page:

The screenshot displays the iThenticate Professional Plagiarism Prevention interface. At the top left is the iThenticate logo. The document title is "BETSYDEV101-S-13-00015.pdf" by Michael Green, dated Wed Apr 17, 2013 11:19am EDT, with 53 words, 1 match, and 1 source. A "Similarity Index" box shows 23%. Below the header, there's a "Document Viewer BETA" button. The main area shows a "Similarity Report" mode with options to "Exclude Quotes", "Exclude Bibliography", and "Exclude small matches". The report details a match for "10.1 testing of Similary Checking functionality --Manuscript Draft-- Manuscript Number: Full Title: 10.1 testing of Similary Checking functionality Article Type: Abstract Keywords:" with 12 words / 23% similarity from "Internet from Sat Dec 29, 2012" at "www.mdag.com". A red box highlights "Powered by Editorial Manager® and Preprint Manager® from Aries Systems Corporation" with a "1" in a box and a link "Click here to". Below this, it says "download Abstract: The Abstract for Demo Purposes.doc The Abstract for Demo Purposes."

The link may show in any of the following Author folders:

- Submissions Sent Back to Author
- Incomplete Submissions
- Submissions Waiting for Author's Approval
- Submissions Being Processed
- Submissions Needing Revision
- Revisions Sent Back to Author
- Incomplete Submissions Being Revised
- Revisions Waiting for Author's Approval
- Revisions Being Processed

The Author may also see the link on the Confirmation page displayed to the Author after they approve their submission or revision, if a similarity check has been completed for that submission.

TO CONFIGURE:

To enable CrossCheck for your publication, contact your Aries Account Coordinator.

To allow Authors to view the Similarity Results for a submission when the Reviewer PDF has been submitted to CrossCheck/iThenticate, go to PolicyManager, Author Role, and select/check the new "View Similarity Check Results" option.

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
- Send Ad Hoc E-mail
- View Author Related Correspondence History
- View Similarity Check Results
- Search Similar Articles in MEDLINE

Bibliographic Search

- AuthorMapper (with first initial at end)
- Author Mapper (LASTNAME)
- Display "Alternate Contact Information" Link on Main Menu

NOTE: This permission is not enabled/selected upon upgrade to v10.1.

Reviewers May View Similarity Check Results

In EM v10.0, Editor and Publisher roles with the proper permission may view the CrossCheck similarity reports for submissions. In some situations, publications may wish to have Reviewers access the Similarity Reports, so they can help analyze some of the returned information while performing their review.

New in EM v10.1, Reviewer Roles may now be given access to the “View Only” version of Similarity Reports for submissions that have been automatically deposited to CrossCheck. When the Reviewer PDF for a submission has been sent to CrossCheck and the similarity report has been completed, then Reviewers with the new “View Similarity Check Results” permission enabled will see the CrossCheck/iThenticate Results Action Link for the submission in their *Pending Reviewer Assignments* folder. The Score of the report displays next to the link, as well as the revision number of the PDF that was submitted (if the PDF is for Rev 1 or higher).

Partial page display:

Pending Reviewer Assignments for Peter Reviewer, DDS							
Page: 1 of 1 (6 total assignments)							
Action	My Reviewer Number	Manuscript Number	Article Type	Article Title	Status Date	Current Status	Date Reviewer Invited
View Submission CrossCheck/iThenticate Results (23%) ← Similar Articles in MEDLINE Submit Recommendation Send E-mail View Submission	1	BETSYDEV101-D-13-00005	Abstract	10.1 testing of Similarity Checking functionality	Apr 17 2013 12:01PM	Under Peer Review	Apr 17 2013 11:52AM

Clicking the link will open the Similarity Report for this submission in a new window. The Reviewer will be able to read the information, but is not logged into the publication’s iThenticate account; they are only viewing the report results.

Sample Page:

The screenshot displays the iThenticate Professional Plagiarism Prevention interface. At the top left is the iThenticate logo. The document title is "BETSYDEV101-S-13-00015.pdf" by "Michael Green". The date and time are "Wed Apr 17, 2013 11:19am EDT" and the statistics are "53 words - 1 match - 1 source". A "Similarity Index" box shows "23%". Below this is a "Document Viewer BETA" button. The main area shows a "Similarity Report" mode with options to "Exclude Quotes", "Exclude Bibliography", and "Exclude small matches". The report content includes: "BETSYDEV101 10.1 testing of Similary Checking functionality --Manuscript", "Draft-- Manuscript Number: Full Title: 10.1 testing of Similary Checking functionality Article Type: Abstract Keywords:", and a match with "Powered by Editorial Manager® and Preprint Manager® from Aries Systems Corporation" (Abstract). A link "Click here to" is present. Below the match is a download link: "download Abstract: The Abstract for Demo Purposes.doc The Abstract for Demo Purposes."

TO CONFIGURE:

To enable CrossCheck for your publication, contact your Aries Account Coordinator.

To allow Reviewers to view the Similarity Results for a submission when the Reviewer PDF has been submitted to CrossCheck/iThenticate, go to PolicyManager, Reviewer Role, Edit the desired Reviewer role and select/check the new “View Similarity Check Results” option.

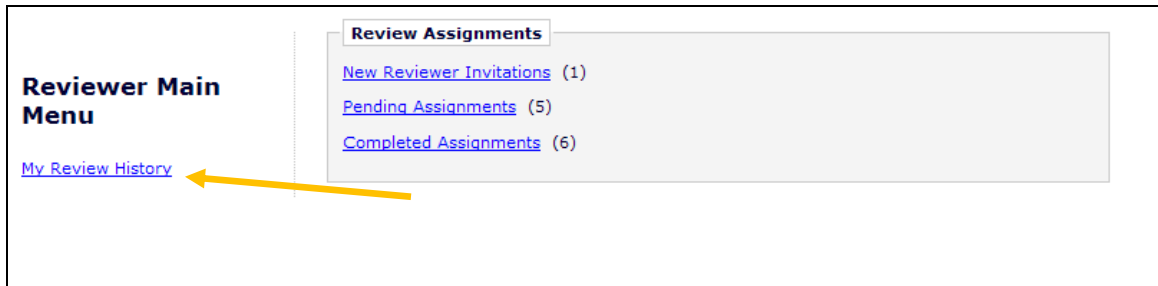
The screenshot shows the "Edit Role Definition" form for the "Reviewer" role. The "Role Name" field contains "Reviewer" with a note "Maximum Role name is 40 characters." Below this is the instruction "Check the functions that this role is permitted to perform." There are two links: "Expand All" and "Collapse All". Under "Permissions for New Reviewer Invitations" and "Permissions for Pending Assignments and Completed Assignments", there is a list of checkboxes: "View Status History", "View Correspondence History", "View Corresponding Author" (checked), "View Similarity Check Results" (highlighted with a yellow box), "View Reference Checking Results" (checked), and "Upload Attachments on Reviewer Recommendation page" (checked).

NOTE: This permission is not enabled/selected upon upgrade to v10.1.

Reviewer Statistics Available to Reviewers

In EM v10.0, Editors may view Reviewer Statistics for the Publication by clicking a Reviewer's name, such as on the *Reviewer Selection* pages when determining which Reviewers to invite for reviewing a submission.

New in EM v10.1, Reviewers may now be given permission to view their own historical statistics for a Publication from their Main Menu. When a new Reviewer permission is enabled, Reviewers with that role will see a new My Review History link under the "Reviewer Main Menu" header on the left part of the main menu.



Clicking this link opens a new *My Review History* pop-up window, where the Reviewer can view his or her own Invitation and Assignment Statistics, arranged in the following sections:

- Current Review Statistics
- Historical Reviewer Invitation Statistics
- Historical Reviewer Performance Summary
- Historical Reviewer Averages
- Reviewer Recommendation Summary
- Reviews in Progress and Outstanding Invitations
- Completed Reviews
- Declined Reviews
- Un-invited Before Agreeing to Review
- Review Cancelled Before Agreeing to Review
- Un-assigned After Agreeing to Review
- Review Cancelled After Agreeing to Review

Sample page display:

My Review History - Richard H. Walker, M.D.

[Close](#)

Current Review Statistics

Date Last Agreed	Reviews in Progress	Outstanding Invitations
Jul 03, 2012	1	1

Historical Reviewer Invitation Statistics

Total Invitations	Agreed to Review	Declined to Review	Un-invited Before Agreeing to Review	Review Cancelled Before Agreeing to Review
10	7	2	1	1

Historical Reviewer Performance Summary

Total Completed Reviews	Submitted on Time	Submitted Late	Un-assigned After Agreeing to Review	Review Cancelled After Agreeing to Review	Date Last Review Completed
2	2	0	2	1	Aug 21, 2012

Historical Reviewer Averages

Days to Respond to Invitation	Days to Complete Review	Days Late	# of Reminders	Manuscript Rating
0	23	12	10	0

Reviewer Recommendation Summary

Accept	0
Minor Revision	1
Major Revision	5
Reject	1

Reviews in Progress and Outstanding Invitations

MS Number	Date Invited	Date Agreed	Date Due	Elapsed Days	Days Late	Last Remind Date	# of Reminders	Handling Editor
DEMO-D-12-01138	Sep 26, 2012	Sep 26, 2012	Oct 21, 2012	14	10		0	Charles R. Clark, M.D.
DEMO-D-12-01139	Oct 29, 2012	Oct 31, 2012	Nov 14, 2012	0	0		0	Clare Rinnac, Ph.D.

Completed Reviews

MS Number	Date Invited	Date Agreed	Date Completed	Days Late	# of Reminders	Recommendation	MS Rating
DEMO-D-12-00213	Apr 23, 2012	Apr 23, 2012	May 14, 2012	11	5	Minor Revision	0
DEMO-D-12-0120	Jul 23, 2012	Jul 23, 2012	Aug 14, 2012	12	4	Reject	0

Declined Reviews

MS Number	Date Invited	Date Declined
DEMO-D-12-00065	Jul 30, 2012	Aug 02, 2012
DEMO-D-12-00382	Jan 04, 2012	Jan 15, 2012

Un-invited Before Agreeing to Review

MS Number	Date Invited	Date Un-invited
DEMO-D-12-00563	Jan 07, 2012	Jan 14, 2012

Review Cancelled Before Agreeing to Review

MS Number	Date Invited	Date Review Cancelled
DEMO-D-12-00146	Jun 13, 2012	Jun 21, 2012

Un-assigned After Agreeing to Review

MS Number	Date Invited	Date Un-assigned
DEMO-D-12-00654	Feb 10, 2012	Feb 28, 2012
DEMO-D-12-00661	Jan 19, 2011	Feb 10, 2011

Review Cancelled After Agreeing to Review

MS Number	Date Invited	Date Review Cancelled
DEMO-D-12-00131R1	Apr 3, 2012	May 21, 2012

[Close](#)

This page displays a subset of the *People Information* page available to Editor Roles. NOTE: The “Review Cancelled” status displayed to Reviewers is comparable to “Review Terminated” in the Editor view.

TO CONFIGURE:

To allow Reviewers to see their own historical Reviewer Statistic information for the Publication, go to RoleManager, and ‘Edit’ the desired Reviewer Roles. Enable the new “View Reviewer’s Own Review History” permission in the “General Permissions” section.

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

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

- Permissions for New Reviewer Invitations
- Permissions for Pending Assignments and Completed Assignments
- Permissions for Completed Assignments Only
- General Permissions (Applicable to All Reviewer Pages)
 - View Manuscript Number
 - View Article Type
 - View Article Title
 - View Status Date
 - View Current Status
 - View Assigning Editor
 - View Author Decision Letter
 - View Unblinded Version
 - View Blinded Version
 - View Other Reviewer's Comments to Author
 - View Other Reviewer's Comments to Editor
 - View Author's Response to Reviewer Comments
 - View Reviewer's Own Review History
 - Send Ad Hoc E-mail
 - Search Similar Articles in MEDLINE
 - Search Author Publications in MEDLINE
 - Bibliographic Search

NOTE: This permission is not enabled/selected upon upgrade to v10.1.

File Inventory Link in Submissions out for Revision Folder

Editorial Office staff may be contacted by Authors with questions about files while Authors are working on revisions, such as questions about which files need to be updated or what updates are required. If the File Inventory link is configured to display on the *Details* page the Editorial Staff may be able to view these files. New in EM v10.1, the File Inventory action link is now available in the *Submissions Out for Revision* folder.

Editor Roles with permission to view the File Inventory for submissions will see this link, and can access files while the submission is being revised by the Author.

Sample view; Submissions Out for Revision folder:

Submissions Out for Revision - Mary Francois Smith, PhD										
Contents: Submissions currently with the Author for revision. Use the up/down arrows to change the sort order.										
Page: 1 of 1 (164 total submissions)						Display 500 results per page.				
Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Date Revision Due ▲▼	Status Date ▲▼	Current Status ▲▼	View Decision ▲▼
View Submission Details History File Inventory View Reviews and Comments Set Final Disposition Initiate Production Google Scholar Title Search Author ORCID profile Send E-mail Linked Submissions	DEMO572	Original Research		World cup soccer etc.	Anthony Author, MD	Jun 16 2006 1:32PM	Jul 30 2006 11:59PM	Jun 16 2006 1:50PM	Revise	Major Revision

TO CONFIGURE:

No additional configuration is required. The File Inventory link will be available in this folder for users with permission to view File Inventory.

PRODUCTION TRACKING ENHANCEMENTS

Automatically Assign Next Production Task from Milestone Task

Currently in PM v10.0, Publications may configure Submission Production tasks to be automatically assigned upon completion of an initial task. Whenever any task is submitted, the system checks whether the next task in line should be automatically assigned, and if so automatically assigns this next task.

New in PM v10.1, this functionality is extended to allow the assignment of a Milestone Task to automatically trigger the subsequent assignment of the next Submission Production task. Milestone Tasks are tasks that are assigned and completed in the same action. When a task of this type is now assigned and completed, the system will automatically check the next Task (either based on Submission Production Task order or the Workflow defined for the Article Type of the submission). If the next in line Task is configured to be automatically assigned, the Task assignment letter will be sent to the defined recipient, and the Submission Task assignment record will be created. If the next in line Task is also a Milestone Task, and the Milestone Task is configured to be automatically assigned, that task is automatically assigned and completed, any configured letters are sent, and the system automatically checks the next Task in the chain.

TO CONFIGURE:

No additional configuration is required to allow a Milestone Task to trigger the automatic assignment of a subsequent task.

URL/URI File Type Option for Companion Files

Publications increasingly wish to include links to large data sets and potentially other large data resources which are often housed at universities and other scientific institutions (such as institutional repositories) accessible via the Internet. Other resources that could be accessed include video (YouTube or other streaming service) and websites.

New in EM/PM v10.1, publications may configure Companion File Item Types to allow users to provide URL/URI addresses rather than uploading large files. These can be uploaded to *File Inventory*, or used for submitting Submission or Schedule Group Production Tasks.

When a Companion File Item Type is configured so that the “URL/URI/External Resource Location” option is “Optional” or “Required”, then when users access the *Attach Files* page for uploading Companion Files, such as when assigning or submitting a Production Task, a new Delivery Method is available for selection called “URL/URI/External Resource”. When this option is selected, the page refreshes to provide a text field where the user can enter the URL/URI address for the file set.

Upload Companion Files for Manuscript Number: BetsyDev100-D-12-00018
Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE): "Another MS# test thing."

[Insert Special Character](#)

Important Note: This page allows you to attach a new file to this submission.

Choose an **Item**, enter a **Description**. Select the Delivery Method Online Web System (to browse for a file) or **URL/URI/External Resource** (to enter a URL or other resource locator). If Online Web System is selected, click the button to locate the file you wish to select, then click the **Attach This File** button. If URL/URI/External Resource is selected, select the URL prefix (http://, https:// or ftp://), type in the remainder of the web address (e.g. www.targetsite.edu/datasets/dataset1), click the **Preview** button to validate your entry, then click the **Attach This Information** button.

Item: Profile

Description:

Delivery Method Online Web System URL/URI/External Resource

http://

Please select http://, https:// or ftp://, then type in the remainder of the web address (e.g. www.targetsite.edu/datasets/dataset1) and click the 'Preview' button to ensure that the address you entered navigates to the correct location. Once you are satisfied with your entry, click the 'Attach This Information' button.

If the user chooses to provide the URL, she enters the address, then clicks the ‘Preview’ button to open the destination in a new window. This way the user can verify they have entered the correct destination.

When the information is correct, she clicks the ‘Attach This Information’ button to add the new item to the *File Inventory* list or to the File List on the *Submit Task* page. When a submission item is displayed on the *File Inventory* page, the file name displays as the link External Item, and hovering the mouse over the link displays the URL it represents. Clicking this link will open the destination in a new window. The page can also be accessed by clicking the Access Item Action Link.

File Inventory for Manuscript Number: BETSYDEV100-D-12-00018
Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE): "Another MS# test thing." [\(View Submission\)](#)

Listed below are the files included in the current version of the latest Revision of the submission. [\(more...\)](#)

Companion Files

Check All	Action	Color	Item	Description <small>(Limit 256 characters)</small>	File Name	Size	Modified	Operator	QC	Display On TF
<input type="checkbox"/>	Access Item Replace Hide		Profile		External Item		Apr 2 2013 4:11PM	Mary François Smith, Managing Editor	N/A	

When a submission item is displayed on the *Submit Task* page, the file name displays as the link [External Item](#), and hovering the mouse over the link displays the URL it represents. Clicking this link will open the destination in a new window. The page can also be accessed by clicking the [Access Item](#) Action Link. To Remove the item from the *Submit Task* page, click the [Remove](#) link in the “Actions” column.

Newly Uploaded Files

Color Code	Item	Description	File Name	Size	Last Modified	Actions
	Profile	Insert Special Character	External Item		Apr 23 2013 12:04PM	Access Item Remove

TO CONFIGURE:

To configure a Companion File Item Type to allow users to submit a URI/URL, go to PolicyManager, [Edit Submission Items](#), and either Edit an existing item or add a new item. Select either “Optional” or “Required” for the new “URL/URI/External Resource Entry (in lieu of file upload)” drop-down option.

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

PDF Handling:

Important Note: If 'Build Hyperlink to the Item into the PDF(Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

URL/URI/External Resource Entry (in lieu of file upload) :

Display with automatic line numbering in PDF

Do Not Unpack Archive files (.ZIP, .tar) of this Type

Include this Item Type for Reference Checking

This Item Type will contain reference annotations. [Example](#)

Choose Default Color Code for Companion file Upload

Order	Color	Description
-------	-------	-------------

NOTE: When you select “Required” from the list, the checkboxes “Include this Item Type for Artwork Quality Checking” and “Include this Item Type for Reference Checking” are grayed out and not available for selection.

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

PDF Handling:

Important Note: If 'Build Hyperlink to the Item into the PDF(Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

URL/URI/External Resource Entry (in lieu of file upload) :

Display with automatic line numbering in PDF

Do Not Unpack Archive files (.ZIP, .tar) of this Type

Include this Item Type for Reference Checking

This Item Type will contain reference annotations. [Example](#)

Choose Default Color Code for Companion file Upload

Order	Color	Description
-------	-------	-------------

Schedule Group Table of Contents Enhancements

In PM v10.0, an Editor or Publisher with “Manage Schedule Groups” permission enabled has a [Manage Schedule Groups](#) link on the Production Tasks Menu. This link opens the *Schedule Groups* folder, where the user can view group details by clicking the Schedule Group name link, and use the [Edit Group Details](#) link to access the *Edit Schedule Group Details* page and edit fields displayed at the top of the page. The Editor or Publisher can edit two items in the “Table of Contents” grid at the bottom of the page; Target TOC Position and “Header” text (insert and edit).

New in v10.1, additional functionality is available for users on the *Edit Schedule Group Details* page.

1. A new “Year” data entry field is added to the top section of the *Add Schedule Group/Edit Group Details* page. This field is also displayed in the *Manage Schedule Groups* folder, *Add Schedule Group/Edit Group Details* page, and *Schedule Group Details* page.
NOTE: The field expects a 4-digit number.
2. A new set of links - [Download Table of Contents](#) and [Download Table of Contents in UTF-8](#) - are added above the Table of Contents grid, allowing it to be downloaded as a tab-delimited file.
NOTE: To open the UTF-8 formatted file in Excel, you must use the File -> Open menu to open the file. Double-clicking on the file may result in Unicode characters not displaying properly.
3. The “Target Number of Pages”, “Target Start Page” and “Target End Page” fields are now editable fields in the “Table of Contents” grid
4. The “Target Number of Pages”, “Target Start Page” and “Target End Page” fields are now available for Headers as well (also editable in the TOC grid)

Edit Schedule Group Details/Add Submissions

Schedule Group Description: Maximum Schedule Group Description is 100 characters

Schedule Group Notes:

Schedule Group Target Online Publication Date: (mm/dd/yyyy)

Schedule Group Target Publication Date: (mm/dd/yyyy)

Schedule Group Target Publication Volume:

Year:

Schedule Group Target Publication Issue:

Target Number of Submissions:

Page Budget:

[Expand All/Collapse All Additional Manuscript Details](#)
[Download Table of Contents](#)
[Download Table of Contents in UTF-8 Format](#)

Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Submission Target Online Date	Submission Date
Production Details Transmittal Form Remove from Group Linked Submissions	1		Original Research	Ron Rapt... (UNITED STATES)	5	1	5	Needs Edit	10.1371/journal.pntd.160			
<input type="checkbox"/> Additional Manuscript Details:												
Remove Header Edit Header	2	new header added when insert header button clicked										
Production Details Transmittal Form Remove from Group Linked Submissions	3	DEMO675	Original Research	Richard Wynne, Ph... (UNITED STATES)	7	7	13	In A... proof	DEMO0675	Pitfalls in the assessment of body composition in survivors of acute lymphoblastic leukaemia	May 23 2008 12:00AM	
<input type="checkbox"/> Additional Manuscript Details:												
		Description	Value									
		Fast Track	NO									
		Corrected MS Title	<input type="text"/>									
		Date Reviewer Paid	<input type="text"/>									

TO CONFIGURE:

No configuration necessary. Users with “Manage Schedule Group” permission will now see these new features.

Display Additional Manuscript Details Fields on Schedule Group Table of Contents

In EM v10.0, publications may configure Additional Manuscript Detail fields (AMDs) that are available for adding Additional Information to a submission for many purposes, such as identifying a submission for Fast Track, etc. These AMD fields can be displayed on Custom *Details* for Editors to complete information.

New in v10.1, these fields can now be configured to display for submissions in Production on the Schedule Group Table of Contents grid. An AMD field can be configured to be displayed in the Table of Contents grid on the *Add Schedule Group/Edit Group Details* and *Schedule Group Details* pages, and be designated as “Editable” on the *Add Schedule Group/Edit Group Details* page.

When Editor and Publisher users with “View Additional Manuscript Details” permission enabled view the Schedule Group Table of Contents where a submission is of an Article Type configured with an AMD that is configured to display, they will see a View Only version of the AMDs in the grid. All AMDs configured to display on the Schedule Group TOC are listed under the submission to which the answers belong.

Schedule Group Details

Schedule Group Description: December 2010 Issue

Schedule Group Notes:

[MIDDLE OF PAGE NOT DISPLAYED]

Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Section/Category
1	45	Original Research	Test Author (UNITED STATES)	12	1	12	Copy Edit in Progress	10.1371/journal.pntd.170	vvv Test 5	
		Additional Manuscript Details	Description	Value						
			Fast Track	NO						
			Corrected MS Title	Demonstration Title						
			Date Reviewer Paid	Apr 04 2013 12:00AM						

Users with “Edit Additional Manuscript Details” permission and “Manage Schedule Groups” permission may Edit the Schedule Group Details. On this page, the AMDs will display (where applicable) under the submission to which they belong. These groups of AMDs can be expanded or collapsed using the individual +/- signs, or using the [Expand All/Collapse All Additional Manuscript Details](#) link above the Table of Contents grid. If a field is configured to be editable on the TOC, then the user will be able to edit the field. Changes made are saved when the user clicks either the ‘Update TOC’, ‘Insert Header’, ‘Submit’ or ‘Add Submissions’ buttons.

Edit Schedule Group Details/Add Submissions

Submit Cancel Add Submissions

Schedule Group Description: Maximum Schedule Group Description is 100 characters

Schedule Group Notes:

[MIDDLE OF PAGE NOT DISPLAYED]

[Expand All/Collapse All Additional Manuscript Details](#)
[Download Table of Contents](#)
[Download Table of Contents in UTF-8 Format](#)

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Submission Target Online Date	Sub Act Onli Dat								
Production Details Transmittal Form Remove from Group Linked Submissions	1		Original Research	Ron Raptor (UNITED STATES)	0	0	0	Needs Copy Edit	10.1371/journal.pntd.160											
<input type="checkbox"/> Additional Manuscript Details: <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>Description</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Fast Track</td> <td>NO</td> </tr> <tr> <td>Corrected MS Title</td> <td><input type="text" value="Targeted Title Info"/></td> </tr> <tr> <td>Date Reviewer Paid</td> <td>Apr 1 2013 12:00AM</td> </tr> </tbody> </table>		Description	Value	Fast Track	NO	Corrected MS Title	<input type="text" value="Targeted Title Info"/>	Date Reviewer Paid	Apr 1 2013 12:00AM											
Description	Value																			
Fast Track	NO																			
Corrected MS Title	<input type="text" value="Targeted Title Info"/>																			
Date Reviewer Paid	Apr 1 2013 12:00AM																			
Production Details Transmittal Form Remove from Group Linked Submissions	3	DEMO675	Original Research	Richard Wynne, PhD (UNITED STATES)	0	0	0	In Autoproof	DEMO0675	Pitfalls in the assessment of body composition in survivors of acute lymphoblastic leukaemia	May 23 2008 12:00AM									
<input type="checkbox"/> Additional Manuscript Details: <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>Description</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Fast Track</td> <td></td> </tr> <tr> <td>Corrected MS Title</td> <td></td> </tr> <tr> <td>Date Reviewer Paid</td> <td></td> </tr> </tbody> </table>		Description	Value	Fast Track		Corrected MS Title		Date Reviewer Paid												
Description	Value																			
Fast Track																				
Corrected MS Title																				
Date Reviewer Paid																				
Original Duncan 0 0 0 Needs Copy 10.1371/journal.pntd.169 testing																				

TO CONFIGURE:

To display Additional Manuscript Details (AMD) fields on the Schedule Group Table of Contents, go to PolicyManager, [Add/Edit Additional Manuscript Detail Fields](#), and Edit an existing field or Add a new field. In the “Options” grid, a new “Schedule Group TOC” option is added to the bottom. This option is set as “Hide” on upgrade to v10.1 for existing field. Uncheck/deselect the box in the “Hide” column to display this field on the Schedule Group TOC for submissions of an Article Type for which this AMD is configured to display. To allow the AMD to be edited on the Schedule Group Table of Contents, select/check the “Edit” box

NOTE: Editors must also have “Edit Additional Manuscript Details” permission enabled.

Edit Additional Manuscript Detail Field

Field Description: [Insert Special Character](#)

This is a Date for Caroline
Maximum 256 characters

Field Type: Date

Default Value for Field:
If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.

None
 Single Value (enter value below)

Display Field for All Article Types
 Display Field for Selected Article Types

Original Study
 Letter to the Editor
 Perspective
 Rapid Communication

[Select All](#)
[Clear All](#)

On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, hold down the 'Command' key while using the mouse to select the desired items.

Options
 Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text. Fields displayed for a submission or proposal may also be displayed for invited Authors whose invitations are generated from them. Select the 'Hide' checkbox for the 'Display for Invited Submissions' setting to suppress the field for invited Authors.

Page	Hide	Editable	Required	Help Text
[MIDDLE OF PAGE NOT DISPLAYED]				
Search Submission	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

Editor and Publisher Roles with permission to “View Additional Manuscript Details” or “Edit Additional Manuscript Details” can then view (or view and edit) the AMDs on the *Edit Group Details* page. The fields are added to the view-only Schedule Group Details page as uneditable labels.

Automatically Copy Target Information to Actual Information on Publication

In PM v10.0, when a submission has been published, Editors or Publisher roles with access to the Publish Information link can manually copy Target Information of a submission (such as Target Start Page, Target End Page, Target Publication Date) to Actual Information fields for a single submission by clicking the ‘Copy Targets to Actual’ button on the *Publish Information* popup. When an entire Schedule Group is closed, all submissions in that Group are set to “complete”, ending Production on all submissions. The Publish Information for each submission needs to be copied for each submission by clicking the ‘Copy Targets to Actual’ button on the *Publish Information* popup.

New in PM v10.1, Publications may be configured so that the Target Information for a submission can be automatically copied into Actual Information fields for all submissions in the Schedule Group when that Schedule Group is closed, or for individual submissions when End Production is clicked for that submission. Publications may further configure this option to allow or prevent existing “Actual” information from being replaced when Production is ended on a submission.

TO CONFIGURE:

To allow Target publication information to be automatically copied to Actual publication information fields when production is ended, go to PolicyManager, and click the new Configure Automatic Copy of Target to Actual Publication Information link.

To allow Submission Target Publication Information to be copied to Actual Publication Information when Production is Ended or a Schedule Group is closed, select/check the “Copy Submission Target Publication Information to Submission Actual Publication Information” checkbox.

Configure Automatic Copy of Target to Actual Publication Information

Set/Check the 'Copy Submission Target Publication to Submission Actual Publication Information' box to have the system automatically copy a submission's Target Publication Information to its Actual Publication Information when production is ended on a submission, or when the Schedule Group to which the submission belongs is closed.

Select the radio button 'Do not overwrite existing values for Actual Publication Information' to skip the Target to Actual copy for any field where there is an existing Actual Publication value. Note: if there is no value in an Actual Publication Field, the Target value will be copied in.

Select the radio button 'Overwrite existing values for Actual Publication Information' to copy Target information for all fields into the matching Actual information fields, overwriting any existing values.

When Production is Ended on a Submission or a Schedule Group is Closed:

Copy Submission Target Publication Information to Submission Actual Publication Information

Do not overwrite existing values for Actual Publication Information

Overwrite existing values for Actual Publication Information

When this box is selected/checked, the two Radio Button sub-options are enabled. The default option is “Do not overwrite existing values for Actual Publication Information”, but the option to allow overwriting is available for selection.

Configure Automatic Copy of Target to Actual Publication Information

Set/Check the 'Copy Submission Target Publication to Submission Actual Publication Information' box to have the system automatically copy a submission's Target Publication Information to its Actual Publication Information when production is ended on a submission, or when the Schedule Group to which the submission belongs is closed.

Select the radio button 'Do not overwrite existing values for Actual Publication Information' to skip the Target to Actual copy for any field where there is an existing Actual Publication value. Note: if there is no value in an Actual Publication Field, the Target value will be copied in.

Select the radio button 'Overwrite existing values for Actual Publication Information' to copy Target information for all fields into the matching Actual information fields, overwriting any existing values.

When Production is Ended on a Submission or a Schedule Group is Closed:

- Copy Submission Target Publication Information to Submission Actual Publication Information
- Do not overwrite existing values for Actual Publication Information
- Overwrite existing values for Actual Publication Information

Cancel

Submit

Allow Schedule Group Task Recipients to Edit Pagination

There may be times when users are given Schedule Group Production Task assignments, and part of that assignment is to provide Target Publication information, such as the order in which submissions appear and the target Start and End Pages for those items.

New in PM v10.1, an “Allow editing of Target Pagination Fields” configuration option is added to the existing *Add Schedule Group Production Task* and *Edit Schedule Group Production Task* pages. When this option is selected, then the Recipient of this Schedule Group Production Task is presented with a new Edit Pagination link for that task in the *Schedule Group Tasks Assigned to Me* folder.

Action	Schedule Group	Production Task	Date Task Assigned	Date Task Due	Days Until Due	Assigned By	Target Publication Date	Target Publication Volume	Target Publication Issue	Target Online Date
View Assignment Letter Submit Task	December 2010 Issue	Typeset	Sep 1 2010 10:54PM	Sep 8 2010 11:59PM	939 days overdue	Mary François Smith, PhD	Aug 8 2011 12:00AM	5	12	Aug 6 2011 12:00AM
View Assignment Letter Edit Pagination Submit Task	December 2013 issue	Update Pagination	Apr 4 2013 4:46PM	Apr 15 2013 11:59PM	11 days	Mary François Smith, PhD	Dec 31 2013 12:00AM	2013	12	Dec 1 2013 12:00AM

Clicking this link opens a new *Edit Pagination* page where the user can edit the following fields for submissions in the Schedule Group:

1. Target TOC Position
2. Target Number of Pages
3. Target Start Page
4. Target End Page

Users may also download the Table of Contents from this page using the Download Table of Contents links above the grid.

Partial page display:

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Submission Target Online Date	Submission Actual Online Date
Production Details	1		Original Research	Ron Raptor (UNITED STATES)	0	0	0	Needs Copy Edit	10.1371/journal.pntd.160			
	2				0					new header added when insert header button clicked		
Production Details	3	DEM0675	Original Research	Richard Wynne, PhD (UNITED STATES)	0	0	0	In Autoproof	DEM0675	Pitfalls in the assessment of body composition in survivors of acute lymphoblastic leukaemia	May 23 2008 12:00AM	
Production Details	4	DEM0765	Original Research	Duncan thedog Webber, KS (XX)	0	0	0	Needs Copy Edit	10.1371/journal.pntd.169	testing exstyles auto-correct		
Production Details	5		Commentary	Anthony Author, MD (ZIMBABWE)	0	0	0	Needs Copy Edit	10.1371/journal.pntd.159			

TO CONFIGURE:

To allow Schedule Group Task Recipients to Edit Pagination information when working on a Schedule Group Task, go to PolicyManager, and click the Configure Schedule Group Production Tasks link. Edit an existing task, or Add a new task. On the *Add/Edit Schedule Group Task* page, a new section called “Metadata Options” is displayed below the FTP Options section. This section has only one option: “Allow editing of Target Pagination Fields”. When this option (not selected on upgrade) is selected/checked, then recipients of the Schedule Group Task will see a new Edit Pagination link for the Schedule Group Task in the *Schedule Group Tasks Assigned to Me* folder.

Edit Schedule Group Production Task

Cancel Proceed

[Insert Special Character](#)

New Production Task Name:
Maximum Production Task Name is 100 characters

Hide When you **Hide** a Production Task Name, the Production Task Name will be deactivated (not available for assignment).

Assignment Options

Typing text into the Custom Instructions will display an "Instructions" link when the recipient views their task assignments. Leave this field empty to suppress this link.

Production Task [Insert Special Character](#)

Custom Instructions:

[MIDDLE OF PAGE NOT DISPLAYED]

notification:
Group Production Task Import Profile:

E-mail Address (for import error notification):

Metadata Options

Allow editing of Target Pagination Fields

Companion File Options

Show Warning if File not uploaded when Task is Submitted

Allow assigned companion files to be replaced when submitting the task

Limit the Companion File Types that can be uploaded when Task is Submitted:
Only Item Types configured as Companion files appear in this list. You may select multiple Item Types or de-select an Item Type by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac).

Important Note: if this task is configured with a Group Production Task Import Profile, one and only one Item Type may be selected from this list. Companion files submitted via FTP for this kind of task will automatically be assigned this Item Type.

MERGE FIELD ENHANCEMENTS

New Publication Date Merge Field

Many publications use the “Publication Date” field for submissions in EM not as the date on which the submission *was* published, but the anticipated date of when it *will be* published. This date can be manually added to the *Details* page for a submission, or the *Transmittal Form* when the Final Disposition of Accept is being set for a submission. PM users also update this field after a submission has been published with the actual date.

New in EM/PM v10.1, a new merge field is added to allow publications to pull the Publication Date into letters associated with a submission. This new merge field, **%DOCUMENT_PUBDATE%**, can be used in any letter related to a submission, and pulls from the “Submission Actual Publication Date” field. If there is no date entered, the merge field will be blank in letters sent.

TO CONFIGURE:

To use the new **%DOCUMENT_PUBDATE%** merge field in letters, go to PolicyManager, Edit Letters, and edit an existing letter or add a new letter. Include the merge field **%DOCUMENT_PUBDATE%** to have the Submission Actual Publication Date merge into letters. The date will be displayed in the publication-defined date format.

New Discussion Forum Merge Field

To accommodate the new Multiple Discussion Topics functionality, a new **%INITIAL_DISCUSSION_POST%** merge field is added to v10.1. This new merge field can be used for letters in the Discussion Forum letter family. This merge field will always populate with the initial post in the discussion topic for which the letter is sent.

The existing **%DISCUSSION_POST%** merge field continues to be available for pulling in the most recent post in a discussion topic for which the letter is sent.

TO CONFIGURE:

To use the new **%INITIAL_DISCUSSION_POST%** merge field in letters, go to PolicyManager, Edit Letters, and edit an existing letter or add a new letter in the Discussion Forum letter family.

CROSS-PUBLICATION ENTERPRISE ANALYTICS REPORTING FEATURE

In EM/PM v10.0, Publications may access reports for a single publication using General Data Export, Custom Reports and the Enterprise Analytics Reporting feature. Cross-publication reporting is available for Custom Reports for Business Publishers with 50 or fewer Publications.

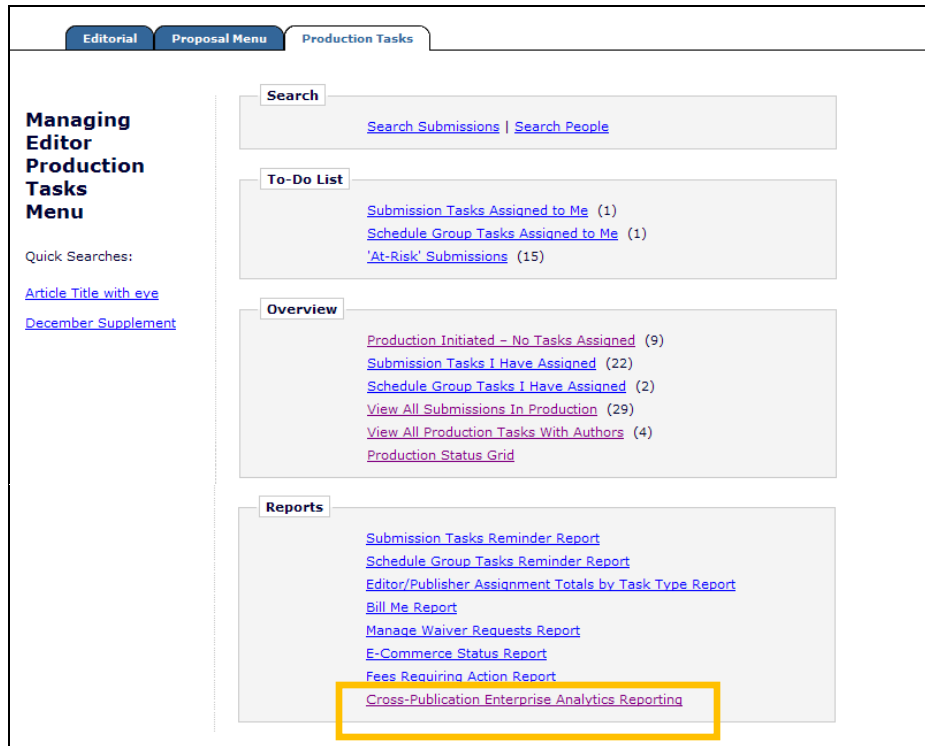
New in EM/PM v10.1, Business Publishers may now use a new Cross-Publication Enterprise Analytics Reporting tool, similar to the existing Enterprise Analytics Reporting tool. The publication must first have a signed agreement with Aries to use Cross-Publication Enterprise Analytics Reporting. Your Aries representative will then enable the feature. Once enabled, Editors with proper permission will see a new link on the Reports menu – Cross-Publication Enterprise Analytics Reporting.

Figure 1 – Reports Menu (partial page)



Additionally, for publications using Production Tracking, Editors with the Production Tasks menu and with the new 'Run Cross-Publication Enterprise Analytics Reports' RoleManager permission enabled will see the Cross-Publication Enterprise Analytics Reporting link in the 'Reports' section of the Production Tasks main menu.

Figure 2



Clicking this link from either location leads to the Cross-Publication Enterprise Analytics Reporting main menu page. From this menu, users can:

- Run standard cross-publication reports supplied by Aries, and adjust report parameters if the report allows it.
- Run shared cross-publication reports created by other users.
- Create cross-publication reports and share these with other users if desired.
- Create new cross-publication reports based on standard reports.

Figure 3 – Cross-Publication Enterprise Analytics Reporting Main Menu – list subject to change



When the feature is first enabled, the Cross-Publication Enterprise Analytics Reporting main menu provides access to a set of Cross-Publication Standard Reports created by Aries for all publications. The Standard Reports section of the main menu has two categories of reports: Cross-Publication Editorial Reports and Cross-Publication Production Tracking Reports (displayed only for publications using Production Tracking). Clicking on a report name immediately runs the report and displays results based on the default criteria.

Editors may use the 'Create Report' link, located to the left of the report menu, to make a new report, or they may use a Standard Report as a starting point and save a customized version of the report. When reports have been created and saved by the Editor, these will also display on the Cross-Publication Enterprise Analytics Reporting main menu in their own section. Reports can be saved as individual-level reports (accessible only to the report creator) which are listed in the 'My Reports' section. Reports can also be shared with other users, and are listed in the 'Shared Reports' section.

NOTE: When this feature is first enabled, the only reports on the menu will be the Standard Reports. The 'My Reports' and 'Shared Reports' sections appear after the Editor saves their own reports, or after another Editor saves a report as a Shared Report.

TO CONFIGURE:

Cross-Publication Enterprise Analytics Reporting is enabled by Aries' Customer Service group. To enable this feature, please contact your customer service representative.

Once this feature has been enabled for your set of publications, a new Permission is available for Editor Roles under the 'Administrative and Reporting Functions' section of RoleManager. This permission, called 'Run Cross-Publication Enterprise Analytics Reports', is a sub-permission of 'Produce Reports'.

Figure 4 – Partial page display; Editor RoleManager

- Flag Icons
- Proxy Activities
- Administrative and Reporting Functions
 - System Administration Functions
 - Unrestricted Access
 - Restricted Access
 - Produce Reports
 - Schedule Reports
 - Run Cross-Publication Enterprise Analytics Reports
 - Create Automated Reviewer Reminders
 - Send Reviewer Reminders
 - Send Editor Reminders
 - Create Automated Author Revision Reminders
 - Send Author Reminders

Main Menu Overview


The Cross-Publication EAR Main Menu displays all available reports separated into sections. A folder icon  is displayed next to each report category. Clicking this icon expands/collapses the list of reports in each category.

Figure 5 – Collapsed Reports List

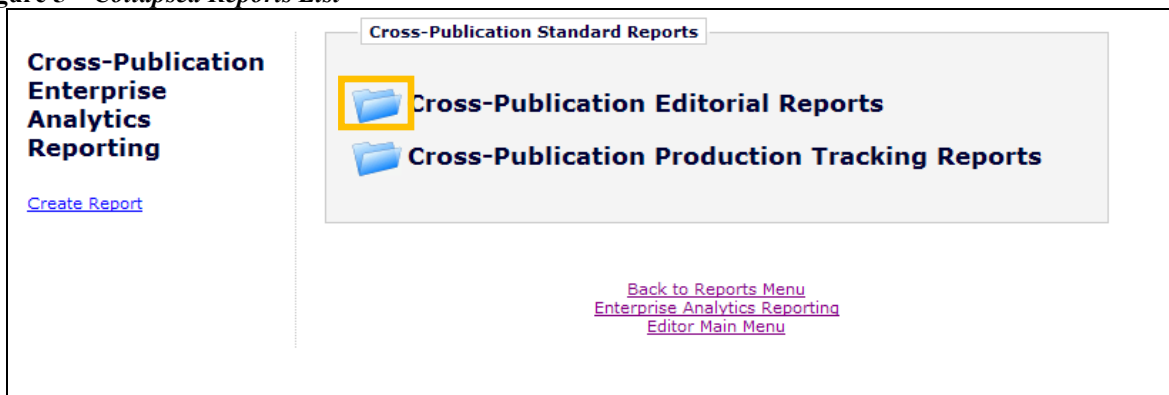
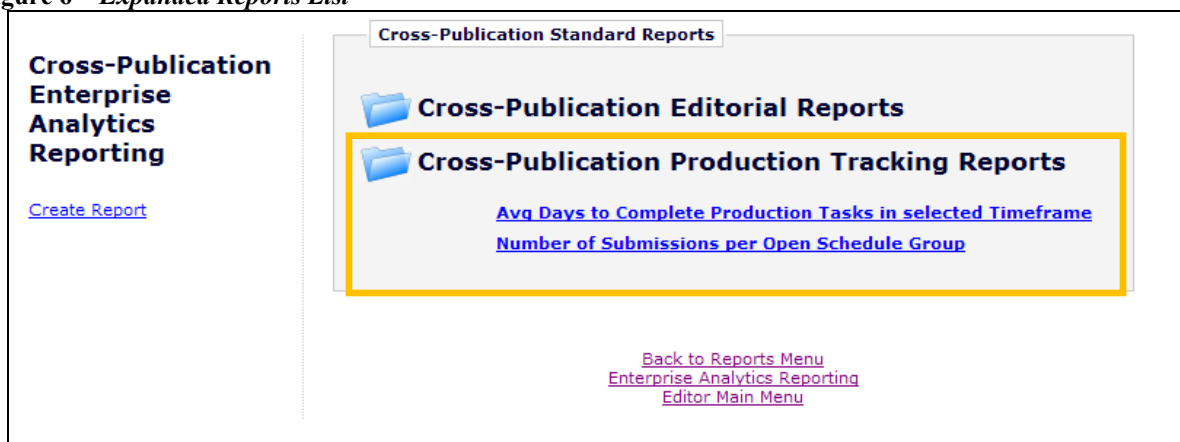






Figure 6 – Expanded Reports List



Each report name appears as a link, and clicking the link will run the report. Hovering the mouse over a report name without clicking may display one to four icons to the left:

- ‘Delete’  – The ‘Delete’ icon allows the user to delete the report.
- ‘Design’  – The ‘Design’ icon allows users to edit the existing report. Users may need to save the edited report as a new report depending on the viewing permission on the original report (see the ‘Tab 6: Misc’ section of this document for more information on security settings).
- ‘E-mail’  – The ‘E-mail’ icon allows the user to e-mail the report results to a user using a letter in the Enterprise Analytics Reporting letter family.
- ‘Schedule’  – The ‘Schedule’ icon appears only for Editors with the ‘Schedule Reports’ permission enabled. It allows one or more delivery schedules to be saved for a

report. Once saved, the report is automatically e-mailed to the selected recipients per the saved delivery schedule. The report e-mail can contain a PDF of the report and/or a deep link to automatically log into the system and view the live report results. NOTE: The recipient must be a registered user to use the report deep link.

The display of the 'Delete' and 'Design' icons depends on how the report was saved (e.g. if it was saved as 'View Only', then no user except the report owner can edit or delete the report). Standard reports created by Aries cannot be modified or deleted by any user, but the 'Design' icon allows users to modify the report, to be saved as a new report. 'E-mail' and 'Schedule' icons display based on permissions of the logged in user.

Figure 7 – 'Delete', 'Design', 'E-mail', and 'Schedule' icons display for a report



Editors may click the 'Design' icon to edit a standard report and then save that report definition under a new name using the 'Save As' button on the report toolbar. The new report will save in either the 'My Cross-Publication Reports' or 'Cross-Publication Shared Reports' area, depending on whether the Editor has elected to share the new report with other users.

When reports are saved in Cross-Publication EAR, they are made available across all publications in the business publisher for which Cross-Publication EAR is enabled. This means that an Editor can run the same report from any of the publication in the Cross-Publication EAR.

Figure 8 – Cross-Publication EAR Main Menu partial display with 'My Cross-Publication Reports' and 'Cross-Publication Shared Reports' areas



To run a report, the Editor clicks on a report name. The display format of the results page depends on the report design (see the ‘Running an Existing Report’ section of this document for more information).

Figure 9 – Sample Report results page – filters at the top of the page may be used to modify the report, displayed in the table below

Article Type	2005	2006	2007	2008	2009	2010	2011	2012
Announcement	0	0	0	0	4	1	2	0
Announcement	0	0	0	0	1	1	2	0
Announcements	0	0	0	0	3	0	0	0
Announcements	0	0	0	1	2	0	0	0
Announcements	0	0	0	0	0	3	0	0
Announcements	0	0	0	0	0	0	0	1
Announcements	0	0	0	0	0	0	0	1
Announcements	0	0	0	0	0	2	0	0
Awards	0	0	0	0	0	0	1	0
Awards	0	0	0	0	0	0	1	0
Awards	0	0	0	0	0	0	2	0
Awards	0	0	0	0	2	1	1	1
Awards	0	0	0	0	0	0	1	1
Awards	0	0	0	2	2	0	2	0
Awards	0	0	0	0	0	1	1	1
Awards	0	0	0	0	0	1	0	0
Book Review	0	0	0	0	0	0	1	0
Book Review	0	0	0	0	0	0	0	3
Book Review	0	0	0	1	0	2	0	1

Users may create a new report from scratch by clicking the [Create Report](#) link on the left side of the main menu. Clicking this link opens the report design interface. See the ‘Creating a New Report, or Editing an Existing Report’ section of this document for detailed information on creating a new report.

Figure 10 – Initial Design Report page

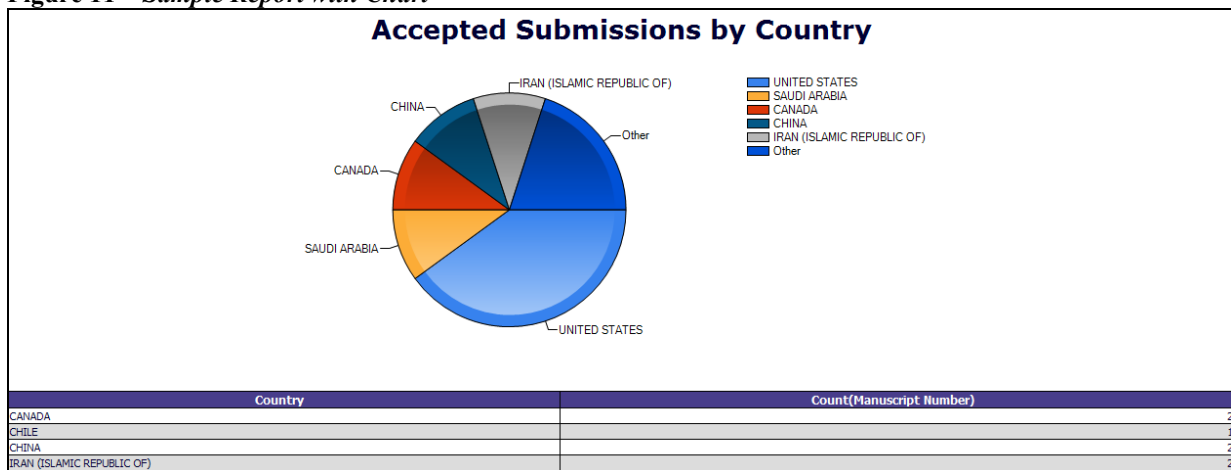
Running an Existing Report

When the Editor clicks a report name from the main menu, the report will run and display the results page. The results page may be configured to display any or all of the following:

1. A chart – displays a graphical depiction of the data being reported (for example, a bar chart, pie chart, etc.)
2. A gauge (speedometer-style graphic) – used for a ‘dashboard’-type display of the data to help visualize critical performance data
3. A summary report – provides a high-level summary of the information being reported in a table format
4. A detailed report – provides a detailed display of the information reported in a table format

Each element is configured on its own tab in the ‘Design’ view. See the ‘Creating a New Report, or Editing an Existing Report’ section of this document for more information on these report elements.

Figure 11 – Sample Report with Chart



When the results are returned, there is a toolbar at the top of the page with options for the user to e-mail the report, download the report, edit the report, or go back to the main menu.

Figure 12 - Toolbar



- – Allows the user to e-mail the report results to another user.
- – Allows Editors (with ‘Schedule Reports’ permission) to create delivery schedules for a report. Once saved, the report is automatically e-mailed to the selected recipients per the saved delivery schedule. The report e-mail can contain a PDF of the report and/or a deep link to automatically log into the system and view the live report results.








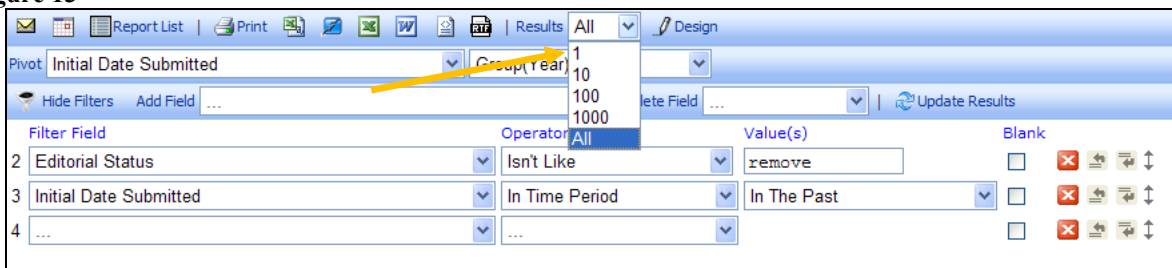
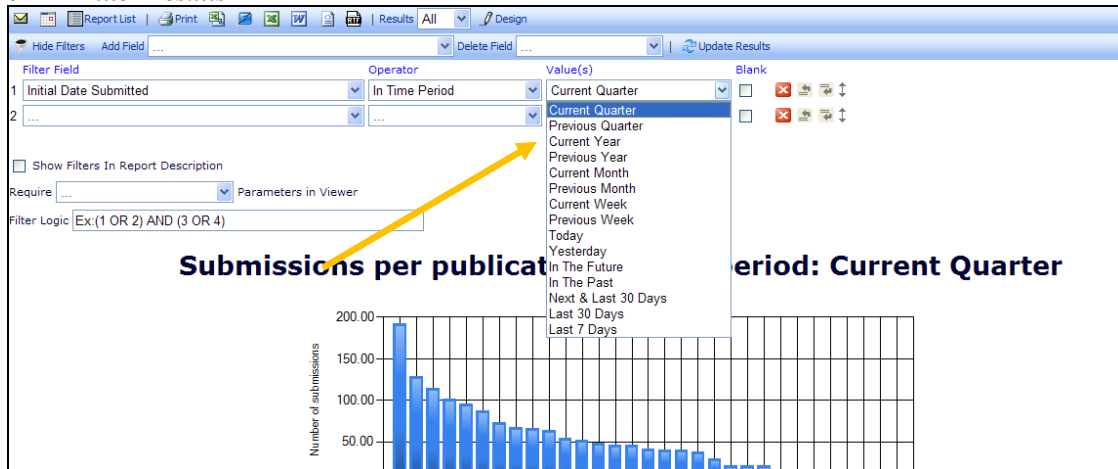
- The ‘Report List’ option returns the user to the Cross-Publication EAR main menu.
- There are a number of options available for downloading the report results:
 -  Print – Prints the results to a PDF file. When the file is ready, a dialog box displays allowing the user to save the PDF to disk or open and print it immediately.
 -  – Downloads the results in comma separated value (CSV) format.
 -  – Downloads the results in OpenOffice document (SXW) format.
 -  – Downloads the results in Microsoft Excel format.
 -  – Downloads the results in Microsoft Word format.
 -  – Downloads the results in an XML document.
 -  – Downloads the results in Rich Text Format (RTF) format.
- The Results filter allows users to limit the number of records displayed on the results page. This should be set to ‘All’ to ensure that all data is returned, though the number of rows presented may be limited to 1, 10, 100 or 1000.

Figure 13



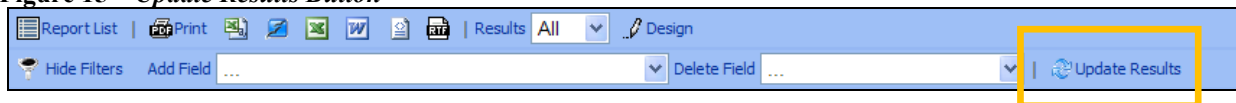
Reports are usually limited to certain data sets (for example, submissions in the current year) using Filters. The report designer decides whether the filter can be changed when the report is run, for example to change the date range that the report covers. If the report contains a Filter that can be changed when running the report, the Filter(s) display at the top of the report results page (similar to the way ‘Search People’ works). The Editor can change the filter temporarily (for example, change Reviewer Stop Date – In Time Period – In the Past, to Reviewer Stop Date – In Time Period – Previous Year).

Figure 14 – Filter Results



To see the results with the change applied, the Editor may need to click the ‘Update Results’ button.

Figure 15 – Update Results Button



The Editor may also use the ‘Add Field’ and ‘Delete Field’ drop-down lists to temporarily add or delete fields to the information displayed in the report results, for example to add an additional piece of information before downloading results. The ‘Add Field’ drop-down displays all fields in the View from which the report was created. The ‘Delete Field’ drop-down displays the fields currently selected to display on the report (fields selected on the ‘Fields’ tab when the report was created and any fields added by the Editor using the ‘Add Field’ drop-down).

NOTE: Not all fields available in the ‘Add Field’ drop-down may be applicable to the report as designed.

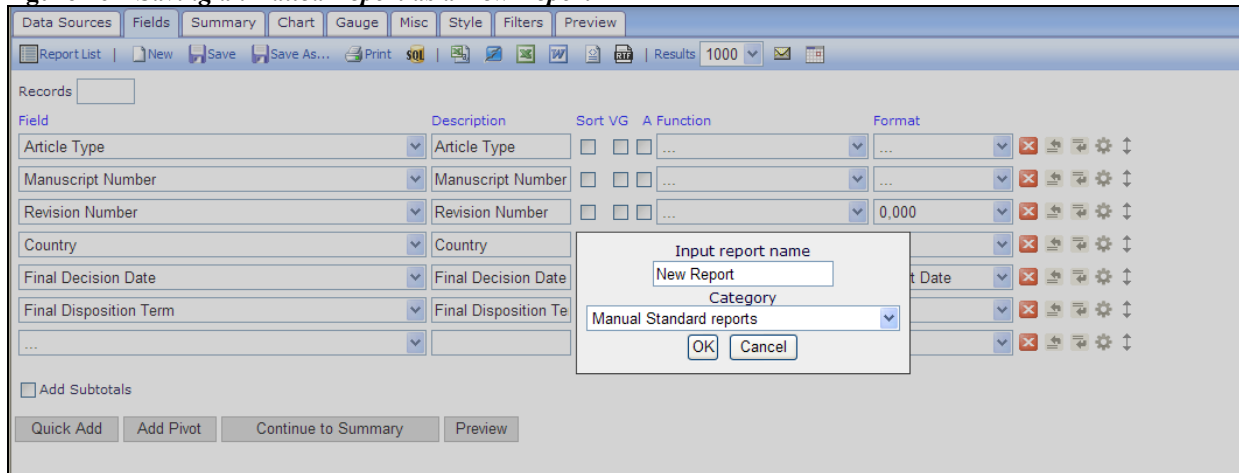
NOTE: Adding or deleting a field in this way affects the detail report results only.

If the Editor wishes to permanently save the new report layout, the Editor must click the ‘Design’ button (the changes are retained) and then click the ‘Save’ button to re-save the report with the new selections, or click the ‘Save As’ button to save the report under a new name.

NOTE: Some reports may be saved with a permission that does not allow other Editors to save changes. See the ‘Tab 6: Misc’ section of this document for more information on report permissions.



NOTE: Fields added or deleted are displayed temporarily, and are discarded in the event the ‘Report List’ buttons are clicked. To retain changes to use the modified report again and again, users must click the ‘Design’ button, and then ‘Save’ or ‘Save As...’.

Figure 16 – Saving an Edited Report as a New Report



Creating a New Report, or Editing an Existing Report

Editors may develop new reports by either creating a new report, or modifying an existing report.

- Create a new report by clicking the [Create Report](#) link from the Cross-Publication Enterprise Analytics Reporting main menu.
- Edit an existing report by clicking the ‘Design’  icon next to the report name on the menu, or by clicking the ‘ Design’ button from the report results page.

Reports are created with the following basic steps:

- Select the reporting view that contains the desired information. NOTE: Cross-Publication EAR contains only views, not tables, and does not allow more than one view to be joined.
- Define one or more elements for displaying the data. Reports can contain a detailed report, plus one other supporting summary, chart or gauge.
- Define the filters required to limit the data results returned in the report.
- Format the report and provide titles and descriptions.

When creating a new report or editing an existing report, the Editor is brought to the Report Designer interface. This interface displays a series of tabs used by the report designer to create or modify the report.

- Data Sources – Select your data source (view) from the available list. This is a required step.
- Fields – Select the fields to be displayed on the Detailed Report. Available fields are those included in the view selected on the ‘Data Sources’ tab. This step also allows complex grouping, arithmetic and Pivot Table functionality to be applied to the data. This step is optional, though at least one of the four key areas (Fields, Summary, Chart, Gauge) should be configured for a report. Each of these four areas is independent, with separate field selections for each.
- Summary – Select the fields to be displayed on the Summary Report. Available fields are those included in the view selected on the ‘Data Sources’ tab. This is an optional step, though at least one of the four key areas (Fields, Summary, Chart, Gauge) should be configured for a report. Each of these four areas is independent, with separate field selections for each.
- Chart – Configure a chart to display information graphically, in a chart format selected from plot, bar, pie, trend, funnel. This is an optional step, though at least one of the four key areas (Fields, Summary, Chart, Gauge) should be configured for a report. Each of these four areas is independent, with separate field selections for each.
- Gauge – Gauges can be used to build ‘dashboard’-type displays and help users visualize critical performance data. This is an optional step, though at least one of the four key





areas (Fields, Summary, Chart, Gauge) should be configured for a report. Each of these four areas is independent, with separate field selections for each.

- Misc – Add a Report Title, Report Description, Report Header and Report Footer. This is also where permissions are determined (whether this is a shared report, available to all users, etc.). This is an optional step, though it is recommended that a title and short description be entered for the report.
- Style – Change the colors of the report, the display order of the elements (Detail Report, Summary Report, Chart, Gauge), and other layout elements. This is an optional step.
- Filters – Use this tab to set up search criteria for the reports. For example, use this tab to set up specified date ranges for a search, or to limit a report to a specific term (such as a specific Editor decision term). This is an optional step, though most reports will require one or more filters to exclude unwanted data.
- Preview – This tab allows the report results to be viewed during the design process, without leaving the report design interface. Each tab also has a ‘Preview’ button that brings the designer to the ‘Preview’ tab.

Figure 17 – Report Design Toolbar



Below the row of tabs is the report designer toolbar containing some additional items not displayed on the Report viewer toolbar:

-  New – Allows report designers to create a new report.
-  Save – Saves changes to the existing report under the same name.
NOTE: This button is not available for all reports, such as a standard report. It is available for all users where a report is saved with ‘Full Access’ permission. See the ‘Tab 6: Misc’ section for more information on permissions.
-  Save As... – Allows the report designer to save a copy of the report under a new name. To save a modified version of a standard report; click the ‘... Design’ button, make edits, then use this button to save a copy.
-  SQL – Allows to the report designer to download the SQL query for the report as a text file.

All other buttons function as on the view report toolbar.

Each tab of the report design process allows the report designer to configure aspects of the report. Not every tab is required to create a successful report, though there needs to be at least one element of the report configured (Fields, Summary, Chart, or Gauge) in order to see any results on the page.

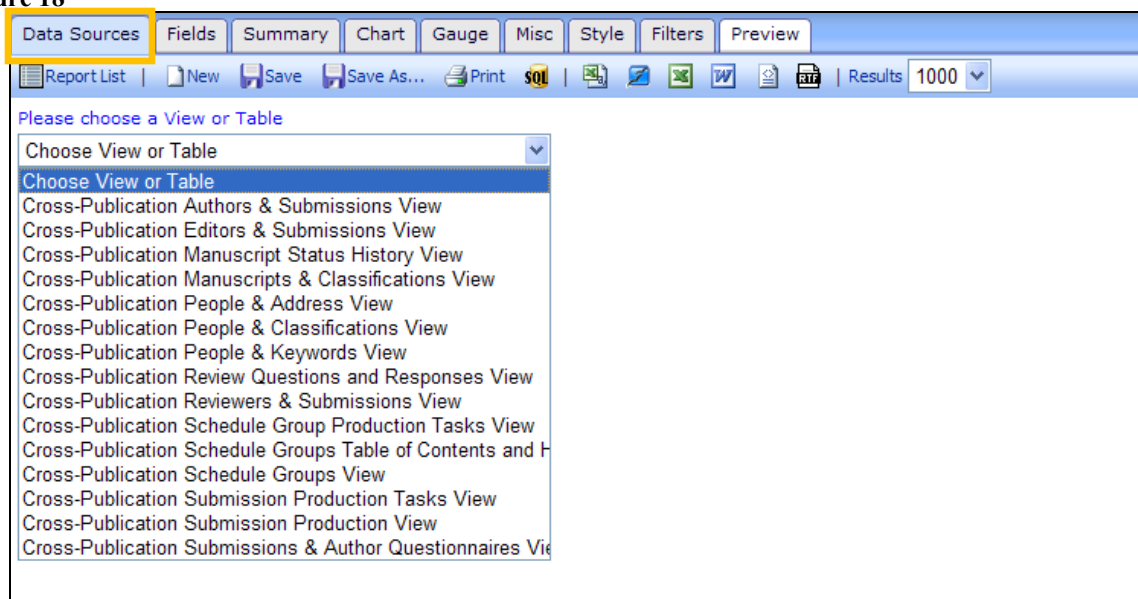
Tab 1: Data Sources

When creating a new report, the 'Data Sources' tab is selected by default. This tab is where the report designer selects a reporting View (a pre-joined set of database tables) from the list of available Views. This list contains a set of Cross-Publication Views similar to the single-publication Views available in 'Custom Reports' and the single-publication EAR.

- NOTE: Some views are available even if the publication is not using the feature (e.g. Production Tracking Views are available). These Views will not contain any data if the publications are not using the feature.

This is a required step. The report designer will not be able to access the other tabs to design the report until a view has been selected.

Figure 18



If the report designer is editing an existing report, a View will have already been selected on the Data Sources tab. This selection can be changed by selecting a different View from the dropdown.

NOTE: Changing a view may affect the Fields, Summary, Chart, Gauge, and Filters tabs.

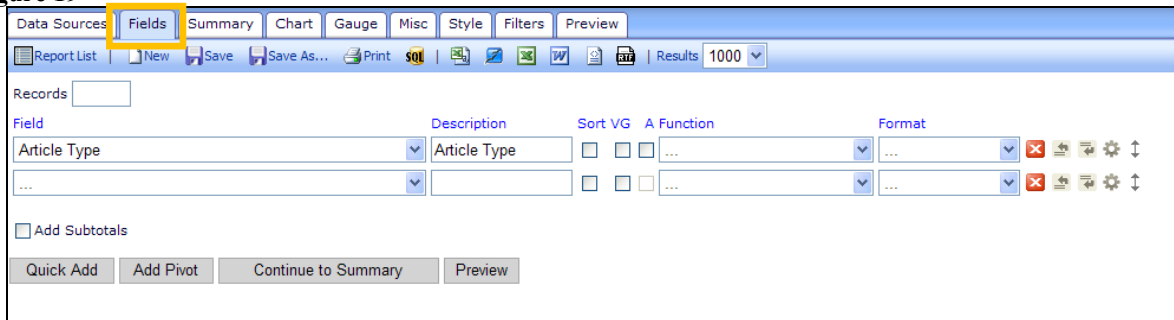
Tab 2: Fields

After selecting the View from the Data Sources tab, the report designer clicks the ‘Continue to Fields’ button or the ‘Fields’ tab to move to the Fields selection page. This page is where the report designer selects the fields that will be used for the detailed report.

The detailed report displays in a spreadsheet-like table, listing the selected fields (one field per column), but the detail report allows much more complex analysis, through:

- Visual Grouping, splitting the detail report into multiple tables, grouped under selected ‘visual group’ fields
- Functional Grouping, permitting a subtotal function to be applied to data under a group (this is not directly linked to visual grouping)
- Arithmetic functions, allowing simple functions (addition, subtraction, multiplication, division)
- Pivot Table functionality, breaking down data under selected column groupings

Figure 19



The ‘Records’ box allows the report designer to limit the number of results that are returned in the Detail report.

NOTE: In most cases, the report designer will not want to limit the number of results, in which case the Records box should be empty.

This ‘Field’ selector contains a drop-down list of all the fields that are available from the View selected on the Data Sources tab. The report designer can select any field contained in this View from the drop-down list. The description entered in the ‘Description’ field will display as the column name on the report, but the report designer may change the description of the field if desired. Alternately, use the ‘Quick Add’ button to add more than one field at a time (see below for more information on this button).

NOTE: Every View available for Cross-Publication EAR contains a field called “Publication Code”. Use this field in reports to distinguish which publication each result row is pulled from.

The designer then has several checkbox options for display and manipulation of the values in the field:


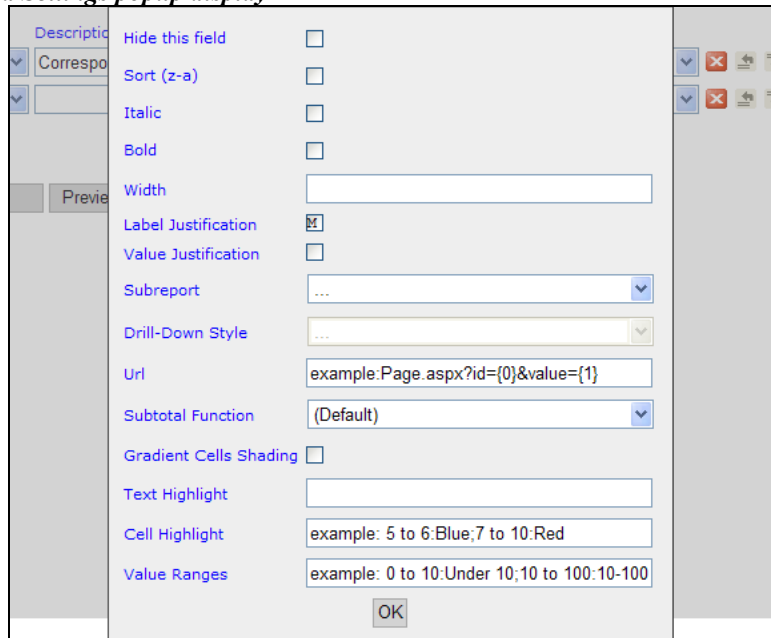
- Sort – selecting this checkbox sorts the report results by the field’s value. The default sort is ascending. To change the sort to descending, the report designer must click the Advanced Field Settings icon  and select the checkbox Sort (z-a) from the Advanced field setting popup.

Figure 20 – *Advanced Settings popup display*



- VG (Visual Grouping) – selecting this checkbox causes this field to be displayed as a sub-header on the report, and all results related to the sub-header are shown underneath. Selecting multiple fields will result in the data grouped by sub-heading of all fields with VG checked/selected. Example: A report listing final disposition term and publication code could be visually grouped by the publication code field. Each publication code will show up as a sub-header on the results, with all the final disposition terms in that publication listed underneath, followed by another publication code sub-header with final dispositions, etc.
Visual Grouping automatically sorts by the fields selected.

Figure 21 – Sample: Visual Grouping Setting

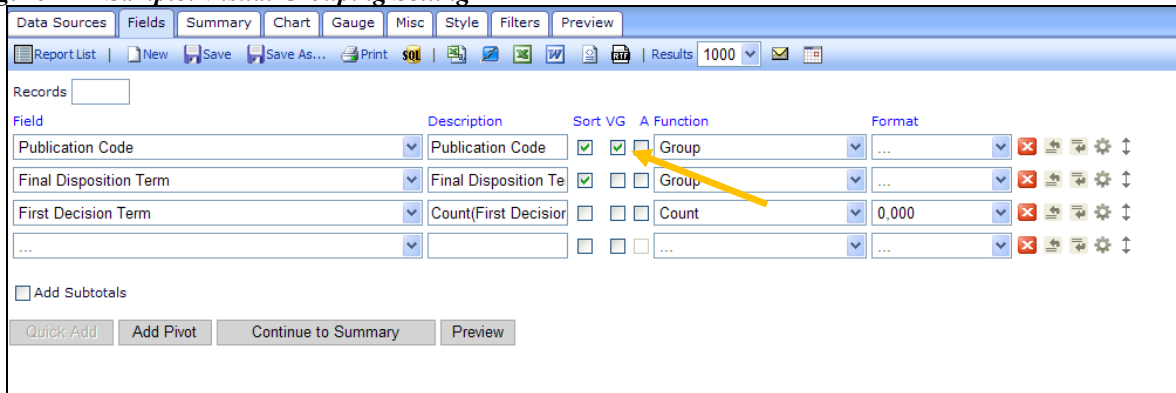
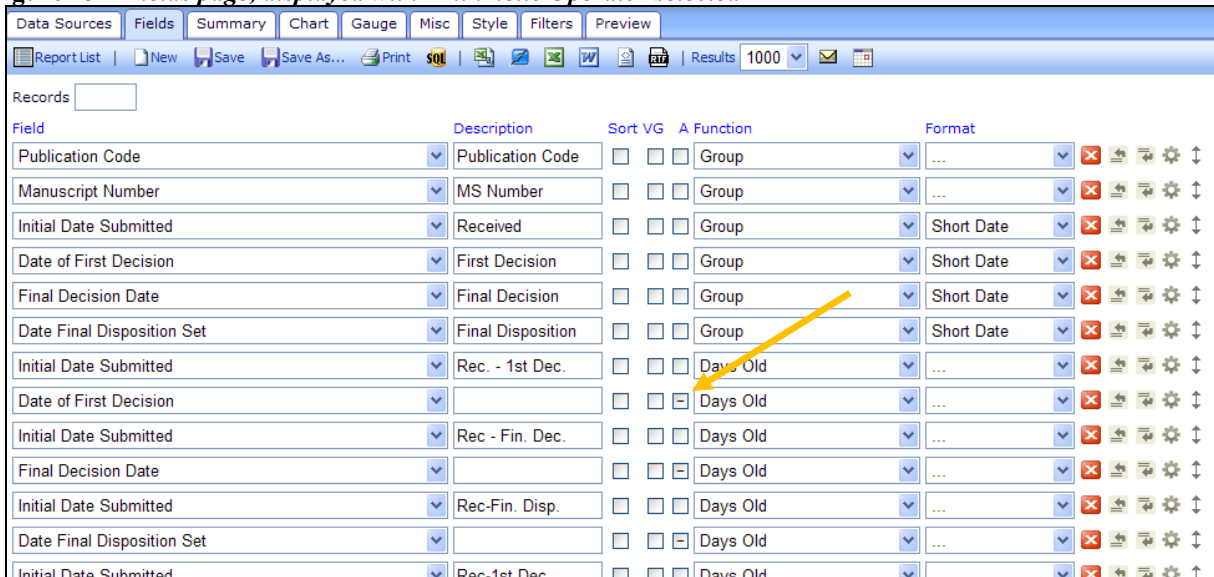


Figure 22 – Sample – Visual Grouping Results

Group	Final Disposition Term	Count(First Decision Term)
AMYDEV100	Accept	291
	Reject	174
	Withdrawn	28
JINGLEDEV100	Accept	48
	Reject	5
	Transfer	3
	Withdrawn	2

- A (Arithmetic operation) – selecting this checkbox allows the report designer to perform addition, subtraction or division of two adjacent fields. When the box is clicked, an arithmetic operator (such as +) will appear. To change the operator, continue clicking in the box. Set the operator on the second field in the desired equation. Place the desired description on the first field. The results page will display the first field’s value [+/-/*/-] the second field’s value. In the standard report ‘Submission Turnaround Times – Editorial’ (example shown below), the subtraction operator is used to calculate the number of days elapsed between dates (such as the number of days between Initial Date Submitted and First Decision).

Figure 23 – Fields page, displayed with Arithmetic Operator selected



The report designer may also use a Function or Pivot to summarize and analyze the data.

There are two main types of Function:

- Group functions allow the report designer to specify the way the data is to be arranged for applying a summary function.
NOTE: Grouping will return only unique rows. For example, if results are grouped by Article Type without including Manuscript Number, one row would be returned for each Article Type configured. To see a count of the submissions per Article Type, an additional field that splits the results down further, such as Manuscript Number, needs to be added.
- Summary functions provide subtotals, averages or other summaries within the specified groupings

As an example, users may wish to have a report that simply lists a count of submissions, with one Article Type per row in a simple table. Selecting the 'Group' function for the 'Article Type' field will return one row per Article Type in the results. To then have a count of how many submissions are assigned each Article Type, the report designer would select a summary function (such as 'Count' function on Unique Document ID), to get the count to display for the Article Type group.

Figure 24 – Sample Report Criteria

Field	Description	Sort VG	A	Function	Format
Publication Code	Publication Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Group	...
Article Type	Article Type	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
Manuscript Number	Count(Manuscript N	<input type="checkbox"/>	<input type="checkbox"/>	Count	0,000
...		<input type="checkbox"/>	<input type="checkbox"/>

Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

Figure 25 – Sample Results of above report

Publication Code	Article Type	Count(Manuscript Number)
AMIDEV100	Rapid Communication	23
AMIDEV100	Co-Authors Register & Verify on Revision	2
AMIDEV100	Publisher Gets Files All Checked	4
AMIDEV100	Ed/Pub Conference Submission	3
AMIDEV100	Rapid Review's-Bill Check & Waiver	362
AMIDEV100	Everything Required	1
AMIDEV100	No Auto Promote	1
AMIDEV100	Corresponding Author Only Verify	23
AMIDEV100	No Files Checked for Publisher	1
AMIDEV100	Invited Editorial	39
AMIDEV100	Editor/Publisher Only	24
AMIDEV100	Co-Author Verify on Revision	2
AMIDEV100	Review-CC and Request Waiver	2
AMIDEV100	Invited Article Type	40
AMIDEV100	Letter to the Editor-CCOnly w/ Paypal	19
AMIDEV100	Co-Author Verify New Submission	4
AMIDEV100	Original Study	6
AMIDEV100	Co-Authors Register & Verify-Author Questionnaires	2
AMIDEV100	Case Report-Every Author Question	25
AMIDEV100	Hidden Start Review	38
AMIDEV100	Invited Editor/Publisher Use Only	1
AMIDEV100	Commentary	16
AMIDEV100	Hidden Offline	1
AMIDEV100	Original Study-All 4 Payment Methods	251
AMIDEV100	General Experiments	4
AMIDEV100	Conference Submission	4
AMIDEV100	Letter to the Editor	3
JINGLEDEV100	Original Study	136
JINGLEDEV100	Annual Meeting Abstract	3
JINGLEDEV100	Fees And Payments	0
JINGLEDEV100	Commentary	7
JINGLEDEV100	With Secondary Stuff	2
JINGLEDEV100	Letter to the Editor	4
JINGLEDEV100	Editorial	3
JINGLEDEV100	Special Issue Article	3
JINGLEDEV100	Rapid Communication	14
LDB_TEST_DB	Original Study	1

- NOTE: The values available in the 'Function' drop-down box depend on the type of field being displayed.
 - If a text field is selected, the choices include 'Group [group the results by this value and show all unique results], Count [count the number of results with a value in this field], and Count Distinct [count the number of results with a unique value in this field, eliminating duplicates from the count].
 - If a date field is selected, additional choices are added; for example Group (Day) [groups results by day], Group (Year) [groups results by year], Group (Month) [groups results by month], etc.
 - If an integer/numerical field is selected, the choices include: Average [calculates the mean average of the values], Maximum [displays only the maximum value], Minimum [displays only the minimum value], Sum [sums the values], Sum Distinct [increments the count once for each unique value, ignoring duplicates], etc.

- It is not necessary to select anything from the ‘Function’ drop-down box, however, if ‘Function’ is used for any field, a selection must be made for all fields.

Similar summary functionality is provided by the Pivot functionality described below.

The ‘Format’ drop-down box is used to determine how the field will display. Example: A report could be designed using ‘First Decision Term’ field with the ‘Count’ function and with the Format set as ‘% of Group (with rounding)’. Another row with ‘First Decision Term’ again using ‘Group’ function (to show the text of the term) can be added, along with a third row of ‘Manuscript Number’ using the function of ‘Count’. Combine this with a Filter set to ‘First Decision Term’ ‘Isn’t Blank’ (to exclude submissions with no first decision yet), and the results display each Decision Term, and the percentage of total First Decisions represented by each term. When the report is run, the first field row displays as a column with the percentage for each decision term, and the second field row displays as a column with the decision term listed.

Figure 26 – Sample report as described above

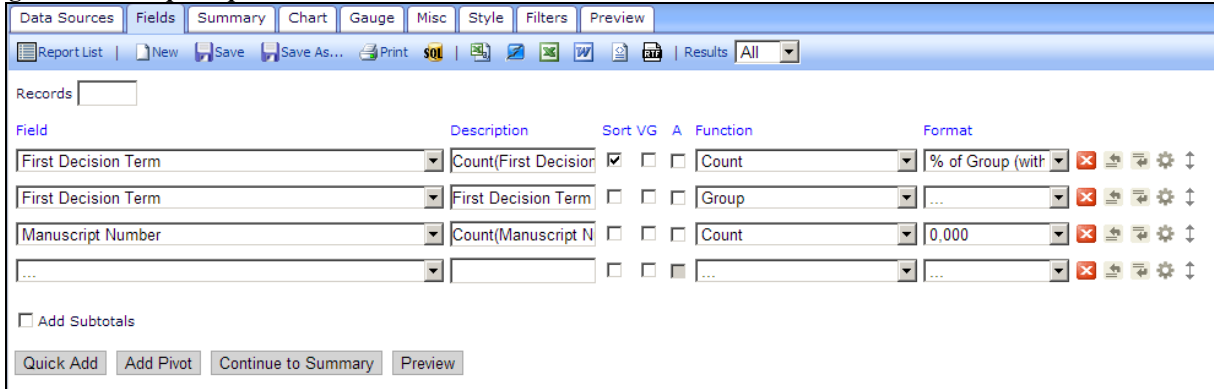


Figure 27 – Results of this configuration. Example: the first decision “Revise” was 30.9 % of total first decisions across all publications

The screenshot shows the report results in a table with three columns: Count(First Decision Term)%, First Decision Term, and Count(Manuscript Number). The data is as follows:

Count(First Decision Term)%	First Decision Term	Count(Manuscript Number)
0.1%	Accept Pending Language/Content Editing by Editor	1
0.2%	Editor Decision-Accept w/ Revision (Vwpts & Ltrs	2
0.4%	Reject/Transfer	3
0.4%	Editor's Decision-"Revise with changes"	3
0.4%	Editor Decision-Accept w/ Revision (Vwpts & Ltrs)	3
1.0%	Editor's Having Bad Day-Reject	8
10.4%	Accept with Minor Revisions	85
20.1%	Reject	161
30.9%	Revise	254
36.2%	Accept	297

To split out the First Decisions by Publication, add ‘Publication Code’ to the Fields tab.






Figure 28 - Example: now the First Decision is shown per Publication Code.

Publication Code	Count(First Decision Term)▲	First Decision Term	Count(Manuscript Number)
UDB_TEST_DB	0.1%	Accept	1
AMYDEV100	0.1%	Accept Pending Language/Content Editing by Editor	1
AMYDEV100	0.2%	Editor Decision-Accept w/ Revision (Vwpts & Ltrs)	2
AMYDEV100	0.4%	Editor Decision-Accept w/ Revision (Vwpts & Ltrs)	3
JINGLEDEV100	0.4%	Reject/Transfer	3
AMYDEV100	0.4%	Editor's Decision-Revise with changes"	3
JINGLEDEV100	0.6%	Reject	5
AMYDEV100	1.0%	Editor's Having Bad "Day-Reject	8
JINGLEDEV100	3.4%	Revise	28
JINGLEDEV100	9.0%	Accept	74
AMYDEV100	10.4%	Accept with Minor Revisions	85
AMYDEV100	19.5%	Reject	156
AMYDEV100	27.0%	Accept	222
AMYDEV100	27.5%	Revise	226

- The values in the 'Format' drop-down box depend on the type of field being displayed and the function selected.
- A selection does not need to be made in the 'Format' drop-down box.

TIP: The [...] option will not apply any special formatting to a field, normally resulting in the default format of e.g. 1,000 for integers and counts.

The following icons are displayed to the right of the 'Format' drop-down box:

-  – Deletes the field row from the selected list
-  – Inserts a field row below the current row
-  – Inserts a field row above the current row
-  – Advanced Field Settings: Opens a popup window allowing additional parameters to be selected. As mentioned, this is where the Editor can change the sort order from ascending to descending. See below for additional information on this popup.
-  – Change Field Order: Clicking this icon and holding down the mouse allows the report designer to drag the field above or below other fields, to change the field order.

NOTE: This functionality may not be supported by all browsers.

The Advanced Field Settings popup contains a number of settings that can be designated for the specific field (row) rather than the report as a whole.

Figure 29 – Sample view of Advanced Field Settings popup

The settings include:

- Hide this field – allows the field to be hidden from the reports. An example may be if the results are to be sorted by a field, but that field is not required for the report results.
- Sort (z-a) – when a field is used for sorting a report, this option allows the sort order to be changed from ascending to descending.
- Italic – displays the results in this column in italics
- Bold – displays the results in this column in bold
- Width – allows the report designer to designate a fixed column width in pixels.
NOTE: If the Width entered is narrower than the length of the column label, the column label width will take precedence.
- Label Justification – sets whether the column labels are Right, Middle, or Left justified. The default is Middle. Clicking the box rotates through the options.
- Value Justification – sets whether the values in the columns are Right, Middle, or Left justified. The default is blank, which left-justifies text fields and right-justifies number fields. Clicking the box rotates through the options.
- Subreport – Used to select a ‘drill-down’ report. This feature is not recommended for use with Cross-Publication EAR.
- Drill-Down Style – Used in conjunction with the ‘Subreport’ option above. This feature is not recommended for use with Cross-Publication EAR reports.
- Url – used to link to a specific page in the system. This field is typically not used.
- Subtotal Function – used in conjunction with the ‘Add Subtotals’ checkbox (see below).

- Gradient Cells Shading – used to shade cells in alternate gradients. This field is typically not used.
- Text Highlight – defines a color in which the result text displays, such as ‘green’ or ‘blue’.
- Cell Highlight – defines a color in which the cell background displays, such as ‘red’ or ‘yellow’.
- Value Range – allows the substitution of a value with text. For example, to easily identify all submissions where the number of completed reviews is < 2, replace the values of 0 or 1 with text on the report such as ‘Needs additional Reviewers’. Combining this with a cell highlight of ‘yellow’ might produce results resembling the following:

Figure 30

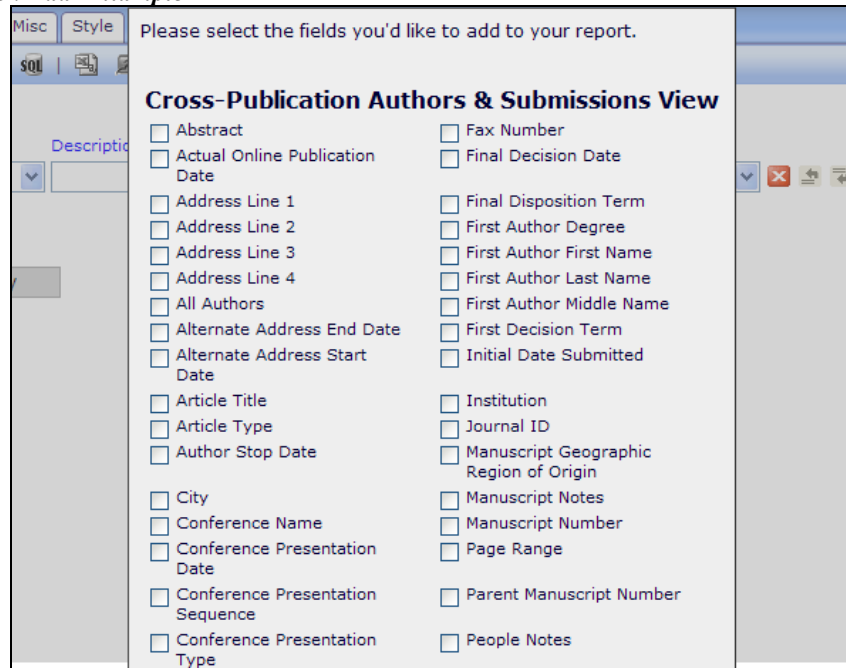
Count(Review Complete)	Manuscript Number
Needs additional Reviewers	TEST-101
8	DEMO997
11	CTEST50-D-05-010
5	CAROLINETEST92-D-12-00004
3	CAROLINETEST91-D-11-00002
5	CAROLINETEST73-D-09-00010
8	CAROLINETEST72-D-09-00007
2	CAROLINETEST71-D-09-00005
6	CAROLINETEST71-D-09-00001
Needs additional Reviewers	CAROLINETEST61-D-08-00021
9	CAROLINETEST61-D-07-00007
8	CAROLINETEST60-D-07-00037
2	CAROLINETEST60-D-07-00006
7	CAROLINETEST60-D-07-00005
5	CAROLINETEST60-D-07-00004
2	CAROLINETEST60-D-07-00003
Needs additional Reviewers	CAROLINETEST60-D-07-00002
8	CAROLINETEST60-D-07-00001
10	CAROLINETEST50-D-06-00021

The checkbox ‘Add Subtotals’ allows the report designer to automatically add subtotals to the bottom of each report column that contains numbers. Click the ‘Advanced Field Settings’ icon next to each field that will be subtotaled to further refine how the subtotal will be calculated using the ‘Subtotal Function’ field (e.g. Count, Count Distinct, etc.), or to suppress the subtotal for that field.

The following buttons display below the field grid:

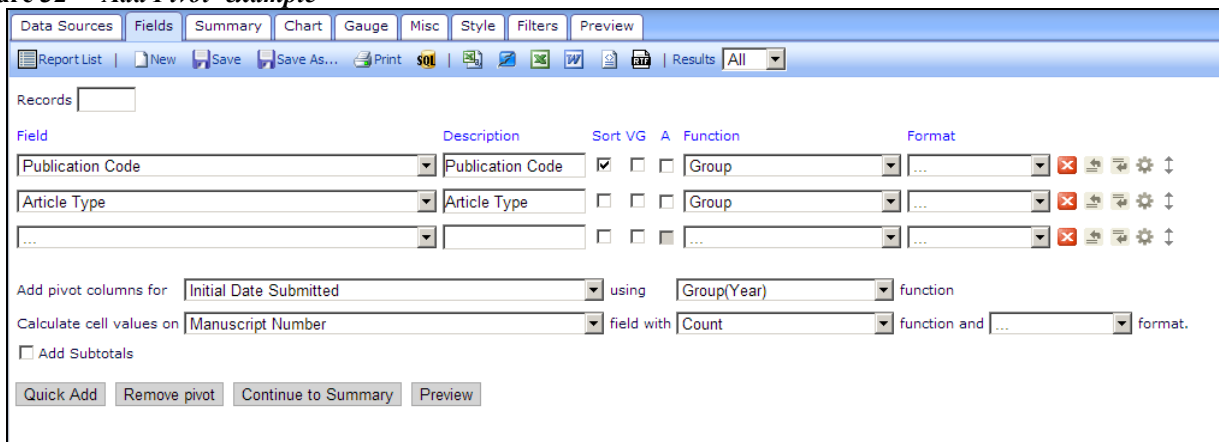
1. Quick Add – opens a popup window listing all available fields allowing the report designer to select multiple fields at once. Hovering over the field name displays the entire name of the field.

Figure 31 – ‘Quick Add’ Example



2. Add Pivot – allows the report designer to add an additional level of information to the report.
 - A Pivot automatically groups and summarizes data, in a similar fashion to setting up a group manually using the Function drop-downs or using a Pivot table in Excel.
 - When adding a Pivot, the group values are displayed in columns rather than rows, with the summary displayed below the column.

Figure 32 – ‘Add Pivot’ example



- First select a field in the “Add pivot columns for” drop-down.
- Select a function (as described in the Function section above) to apply to this field. The available options are dependent on the selected field. In the above

example, the Initial Date Submitted will be grouped together by year, so that there will be one column displayed for each year.

- Select a field to be used in the calculation, then select the function to apply to that calculation and the format to be applied to the results.

NOTE: For Cross-Publication reports, Unique Document ID is not unique across all publications, so Manuscript Number is suggested as a replacement.

For example, in the Article Type grouping example above, in addition to selecting the Publication Code and Article Type as Fields and applying the Group function to each of them (which creates a report with each Publication Code and Article Type as a separate row), selecting Initial Date Submitted under the ‘Add Pivot Columns for’ with a Group(Year) operation, then selecting the ‘Manuscript Number’ field with the function ‘Count’ creates a report with one column per Year, showing the count of Submissions of the given Article Type that have progressed to the point of receiving a manuscript number.

NOTE: The report designer needs to select at least one field in the main table (or create a Summary Report on the ‘Summary’ Tab), and the data will automatically be grouped by that category in rows plus the selected pivot field in columns.

Figure 33 – Results display one column for each Year, with a count of each Publication Code and Article Type displayed in the left columns

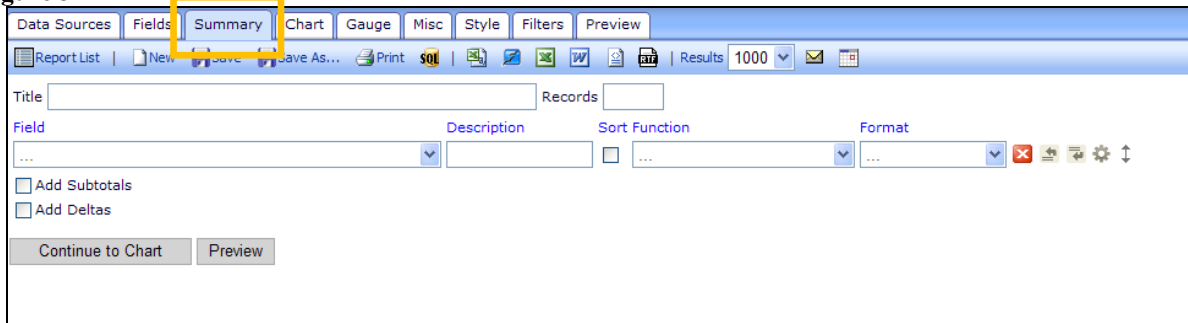
Publication Code	Article Type	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
AMYDEV100	Editor/Publisher Only	0	0	0	0	0	0	1	1	18	4
AMYDEV100	Invited Article Type	0	6	10	4	4	8	4	2	1	1
AMYDEV100	Original Study	6	0	0	0	0	0	0	0	0	0
AMYDEV100	Commentary	0	2	9	1	0	3	1	0	0	0
AMYDEV100	Conference Submission	0	0	5	3	0	3	1	1	0	0
AMYDEV92LDB	Letter to the Editor	0	0	0	0	0	0	0	0	0	0
JINGLEDEV100	Commentary	0	0	0	0	4	2	0	0	1	0
JINGLEDEV100	Original Study	0	0	0	0	73	17	2	8	21	15
JINGLEDEV100	Annual Meeting Abstract	0	0	0	0	0	0	0	0	3	0
JINGLEDEV100	Letter to the Editor	0	0	0	0	0	4	0	0	0	0
JINGLEDEV100	Editorial	0	0	0	0	0	1	0	0	0	2
LDB_TEST_DB	Original Study	0	0	0	0	0	0	0	0	0	1

3. Continue to Summary – allows the report designer to go to the Summary tab. The report designer can alternatively click on the ‘Summary’ tab instead of using this button. See below for more information on the ‘Summary’ tab.
4. Preview – clicking this button generates a preview of the report results page, without saving the report. The report designer can alternatively click the ‘Preview’ tab instead of using this button.

Tab 3: Summary

A Summary Report is a slightly simpler version of the Details report created on the Fields tab. Use this report for a simple list of submissions, or to apply grouping or summary functions to those lists for simple subtotals. The arithmetic, visual grouping, and Pivot functions are not available for Summary reports. This step is optional.

Figure 34




The 'Title' box allows the report designer to enter a title specifically for the Summary Report. This will be displayed for this summary, and may be different from the general report title entered on the 'Misc' tab.

The 'Records' box allows the report designer to limit the number of results that are returned in the Summary report.

NOTE: In most cases, the report designer will not want to limit the number of results, in which case the Records box should be empty.

As with the 'Fields' tab, the report designer chooses the fields to appear in the summary report by using the 'Fields' drop-down list, adds a description, enables sorting (if desired), chooses a function, and selects the format (see 'Tab 2: Fields' for full information).

Two checkboxes display under the field grid:

- Add Subtotals – When this is checked/selected, subtotals are generated for all columns that use numbers. To control the exact calculation of the subtotal of a given field, click the 'Advanced Field Settings' icon  for that row and make a selection from the 'Subtotal' drop-down list.
- Add Deltas – When checked/selected, the system generates the difference between the value in one row and the value in the next row in all columns that contain numerical values. Example: This can be used to calculate the difference between the number of submissions received in one year versus the following year.

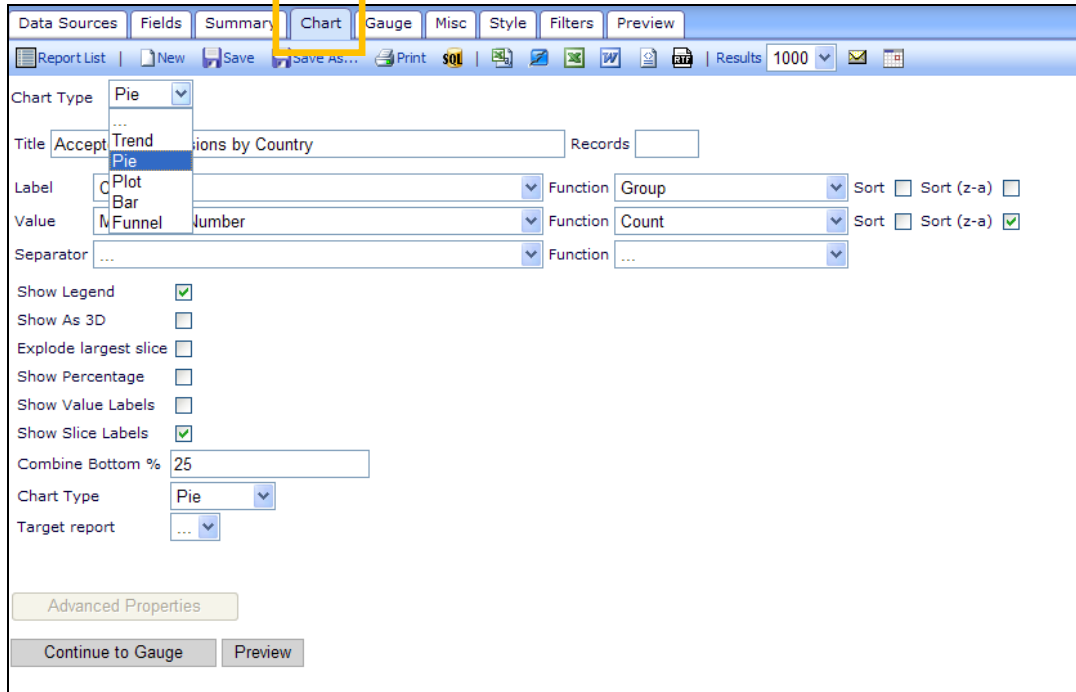
The following buttons display:

1. Continue to Chart – allows the report designer to go to the ‘Chart’ tab. The report designer can alternately click the ‘Chart’ tab instead of using this button.
2. Preview – clicking this button generates a preview of the report results page, without saving the report. The report designer can alternately click the ‘Preview’ tab instead of using this button.

Tab 4: Chart

This Chart step is optional, and is used if the report designer wants to include a chart or graph with the report.

Figure 35



The first step is to select a Chart type. The following types are available:

- Trend – displays a plot of the results in the shape of a line graph.
- Pie – displays the results as a pie chart. When ‘Pie’ is selected from the drop-down list, additional options are available such as ‘Explode largest slice’ (separate the largest slice from the rest of the pie), ‘Show Percentage’ (show the chart as percentages of the total instead of raw numbers), etc.
- Plot – similar to Trend, but the individual results (plot points) are not connected by a line.
- Bar – displays the results as a bar graph. Additional parameters are available when ‘Bar’ is chosen.
- Funnel – displays the results in the shape of a funnel (typically used for illustration in reporting).
NOTE: The results are not sorted by default, so in order to make this chart meaningful, the results should be sorted from largest to smallest.

Depending on which type of Chart is selected, additional selections may be configured for the chart. These may include:

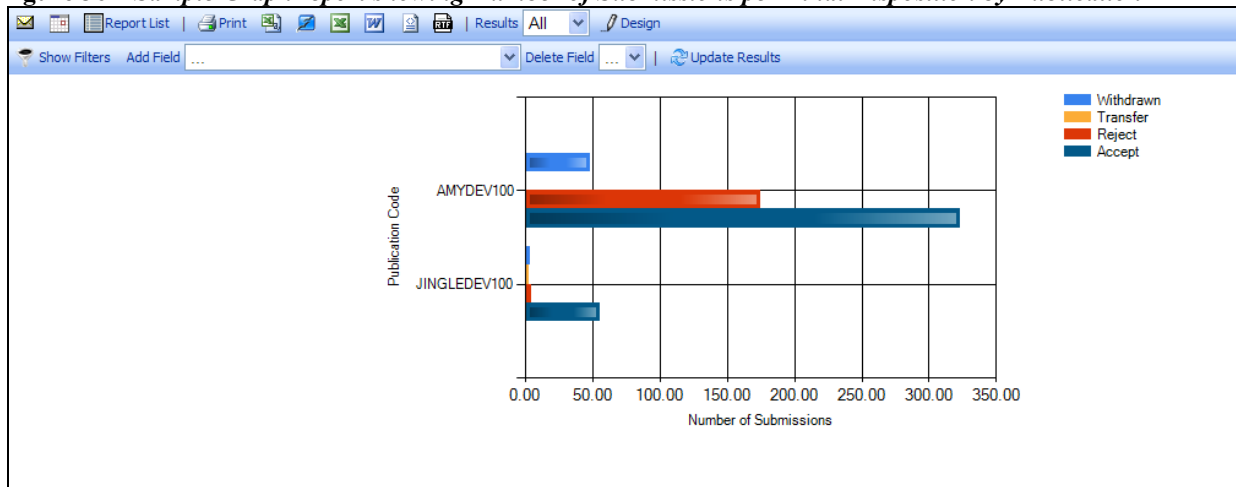
- Title – allows the report designer to enter a title to appear over the chart. This will be displayed for this chart, and may be different from the general report title entered on the ‘Misc’ tab.
- Records – allows the report designer to limit the number of results that are used to build the chart.
NOTE: In most cases, the report designer will not want to limit the number of results, in which case the Records box should be empty.
- Label – allows report designer to use the drop-down to select the horizontal (X) axis labels (categories) for the report
- Value – allows report designer to use the drop-down to select the value that is being graphed.
- Separator – displayed for some chart types. If displayed, it allows the report designer to further subdivide the results.
- Show legend – when selected, shows the chart legend to the right side of the chart.
- Show as 3D – shows each slice of a Pie chart in 3D.
- Explode largest slice – shows the largest slice of a Pie chart as separated from the other slices.
- Show Percentage – adds % labels for each slice of a Pie chart.
- Show Value Labels – adds labels to the values. Available for a Trend chart and Pie chart.
- Show Slice Labels – adds labels for each slice of a Pie chart.
- Combine Bottom % - for Pie chart, allows the bottom N percent of results to be combined into one pie piece. Especially helpful when there are a lot of labels with one or two results.
- Show Pareto – adds a cumulative trend line above a bar chart, and adds a right axis with % of total identified.
- Stacked – results are stacked on top of each other instead of side by side. Each value in the stack will have its own color.
- Horizontal – shows the bars horizontally rather than vertically
- Smooth – smooths out a trend chart (line graph), so that the line appears curved rather than spiky.
- Connect – connects the lines of a Plot chart, making it similar to a Trend chart.
- Chart Type – a pie chart can be displayed as a full pie (like a pizza) or as a doughnut with a hole in the center.
- Label Title (Bottom) – allows the report designer to add text for the horizontal label (X) axis.
- Value Title (Left) – allows the report designer to add text on the left for the vertical value (Y) axis.

- Value Title (Right) – allows the report designer to add text on the right for the vertical value (Y) axis.
- Target Report – for use with drill-down fields. This feature is not recommended for use with Cross-Publication EAR.

The following buttons display:

- Continue to Gauge – allows the report designer to go to the ‘Gauge’ tab. The report designer can alternately click the ‘Gauge’ tab instead of using this button.
- Preview – clicking this button generates a preview of the report results page, without saving the report. The report designer can alternatively click the ‘Preview’ tab instead of using this button.

Figure 36 – Sample Graph report showing Number of Submissions per Final Disposition by Publication



Tab 5: Gauge

This step is optional, and is used if the report designer wants to create a gauge (speedometer-type chart). The standard Production Tracking report ‘Avg Days to Complete Production Tasks in selected Timeframe’ displays a gauge on the results page.

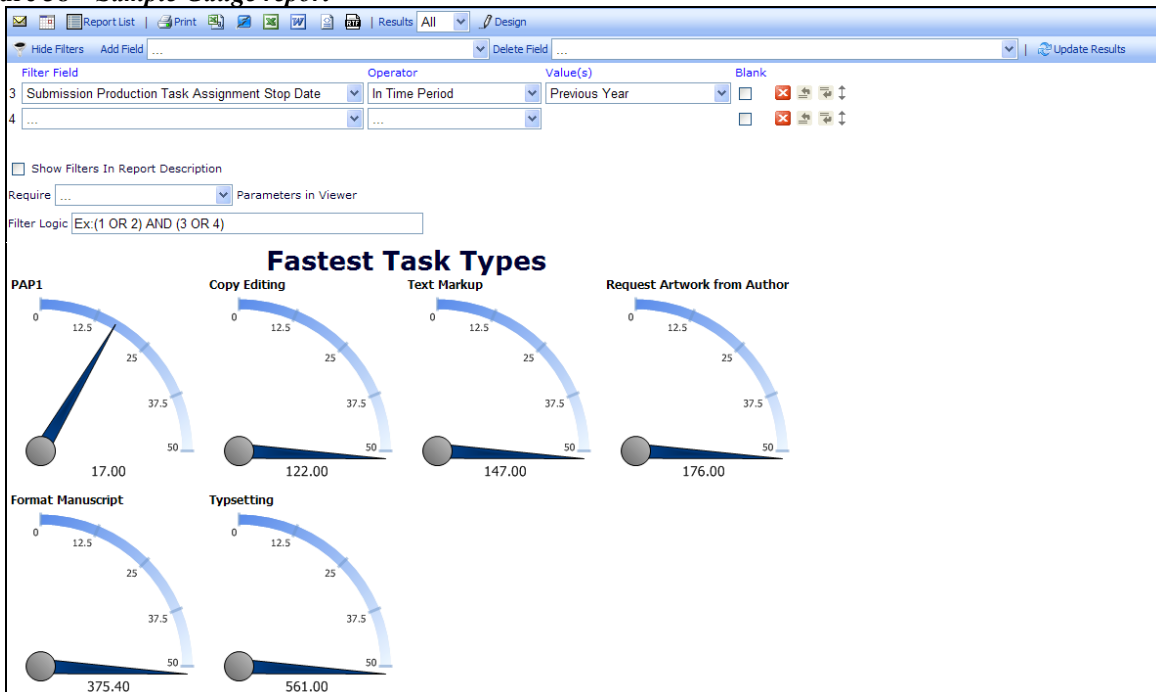
Figure 37

The screenshot shows the 'Gauge' configuration tab in a report designer. The 'Gauge' tab is highlighted with a yellow box. The configuration includes the following fields and values:

- Title: Fastest Task Types
- Name: Submission Production Task Name
- Value: Days between Submission Production Task Assignment
- Function: Average
- Sort: Days between Submission Production Task Assignment
- Function: Average
- Sort (z-a):
- Minimum: 0
- Maximum: 50
- Color: 0%:CornflowerBlue;100%:AliceBlue
- Gauge Style: Radial, Radial 2, Linear
- Target report: ...
- Effect: ...

Buttons at the bottom include 'Continue to Misc' and 'Preview'.

Figure 38 – Sample Gauge report



The following selections are available for configuring the gauge:

- Title – allows the report designer to enter a title for the gauge(s).

- Results – limits the number of gauges displayed.
- Name – allows the report designer to select a label for the gauges from the list of available fields (based on the selected Data Source). In the example above, the Name is ‘Submission Production Task Name’, where each gauge will be labeled with the name of a Submission Production Task.
- Value – allows the report designer to select the value to appear in the gauge from the list of available fields (based on the selected Data Source). In the above example, ‘Days between Submission Production Task Assignment and Task Completion’ is the value, with the ‘Average’ function used to calculate an average number of days for each Submission Production Task.
- Sort – allows the report designer to determine which results (gauges) appear first based on the selected sort field. The default sort is ascending (smallest to largest), to sort descending (largest to smallest), select the checkbox Sort (z-a).
- Minimum and Maximum – allows the report designer to determine the smallest and largest value shown on the gauge.
- Color – allows the report designer to set different colors depending on values. The gauge will gradually change colors as it approaches the target values.
- Gauge Style – allows the report designer to select the appearance of the gauge:
 1. Radial (speedometer style)
 2. Radial 2 (alternative speedometer style)
 3. Linear (ruler style)

The following buttons display:

1. Continue to Misc – allows the report designer to go to the ‘Misc’ (Miscellaneous) tab. The report designer can alternately click the ‘Misc’ tab instead of using this button.
2. Preview – clicking this button generates a preview of the report results page, without saving the report. The report designer can alternatively click the ‘Preview’ tab instead of using this button.

Tab 6: Misc

The Misc step is optional. It allows the report designer to enter a Title, Header and Footer for the report. It also allows configuration of “Share With” rights and the selection of a Drill-Down Key. This feature is not recommended for use with Cross-Publication EAR reports.

Figure 39

The screenshot shows the 'Misc' tab selected in a report designer. The 'Misc' tab is highlighted with a yellow box. The interface includes the following elements:

- Title:** A text input field with a justification icon (L).
- Description:** A text input field containing the text "Provides a breakdown of submissions received in specified time period, by article type." with a justification icon (L).
- Header:** A text input field with a justification icon (L).
- Footer:** A text input field with a justification icon (L).
- Share With:** A dropdown menu set to "Everyone".
- Rights:** A dropdown menu set to "Full Access".
- Drill-Down Key:** A dropdown menu with a placeholder "...".
- Buttons:** "Continue to Style" and "Preview" buttons at the bottom.

The following options are available:

- Title – allows the report designer to enter a title for the report as a whole. This is the title that displays on the Main Menu.
- Description – allows the report designer to enter a report description that is displayed underneath the report title on the results page.
- Header – allows the report designer to enter a header that appears above the report Title on the results page.
- Footer – allows the report designer to enter a footer that appears below the last table of results.
- Share With – always set to 'Everyone'. For the EM/PM implementation of the Cross-Publication EAR, the only available option is 'Everyone'.
- Rights – allows the report designer to determine whether this is a shared report, and whether other users may make changes. The default setting for new reports is 'None'. The options are:

1. None – saves the report under the report designer’s 'My Cross-Publication Reports' area of the Cross-Publication EAR main menu. No other user can view or resave the report. The report designer can click the 'Design' button to make changes to the report and save the changes to the same report (using the 'Save' button), or to a new report (using the 'Save As' button). The report creator can

also delete, e-mail or schedule the report (based on 'Schedule Report' permission).

2. Full Access – saves the report under the 'Cross-Publication Shared Reports' area of the Cross-Publication EAR main menu on all publications participating in the business publisher group with Cross-Publication EAR enabled. Other users can click the 'Design' button to change the report, and can save changes to the underlying report using the 'Save' button or use the 'Save As' button to save changes to a new report. All users can delete or e-mail the report. Users with 'Schedule Reports' permission can schedule the report.

NOTE: This is the default setting for newly created reports. Saving a report without changing this option will leave the report open to everybody to save modifications.

NOTE: Using the 'Save' button will overwrite the existing report. Allowing Full Access to the report may result in other users saving changes over the original report.

3. Read Only – saves the report under the 'Cross-Publication Shared Reports' area of the Cross-Publication EAR main menu. Other users can view the results and click the 'Design' button to make changes and then use the 'Save As' button to save the report under a new name. Only the report designer sees the 'Save' button to save changes to the base report. Only the report creator can delete the report. All users can e-mail the report, and users with 'Schedule Reports' permission can schedule the report.
4. View Only – saves the report under the 'Cross-Publication Shared Reports' area of the Cross-Publication EAR main menu. Other users can view the results, but cannot resave the report under a new name. The 'Design' button is suppressed on the Report Viewer toolbar and the 'Edit' icon is suppressed on the Cross-Publication EAR main menu. Only the report creator can edit or delete the report. All users can e-mail the report, and users with 'Schedule Reports' permission can schedule the report.

NOTE: Standard reports can never be edited, but a copy can be saved under new name and the copy can be changed.

- Drill-Down Key – the drop-down box lists all fields available for the report (based on the selection in the Data Sources tab). Making a selection in this drop-down allows this detailed report to be 'linked' to a different calling report, using a field common to both reports. This feature is not recommended for use with Cross-Publication EAR reports.

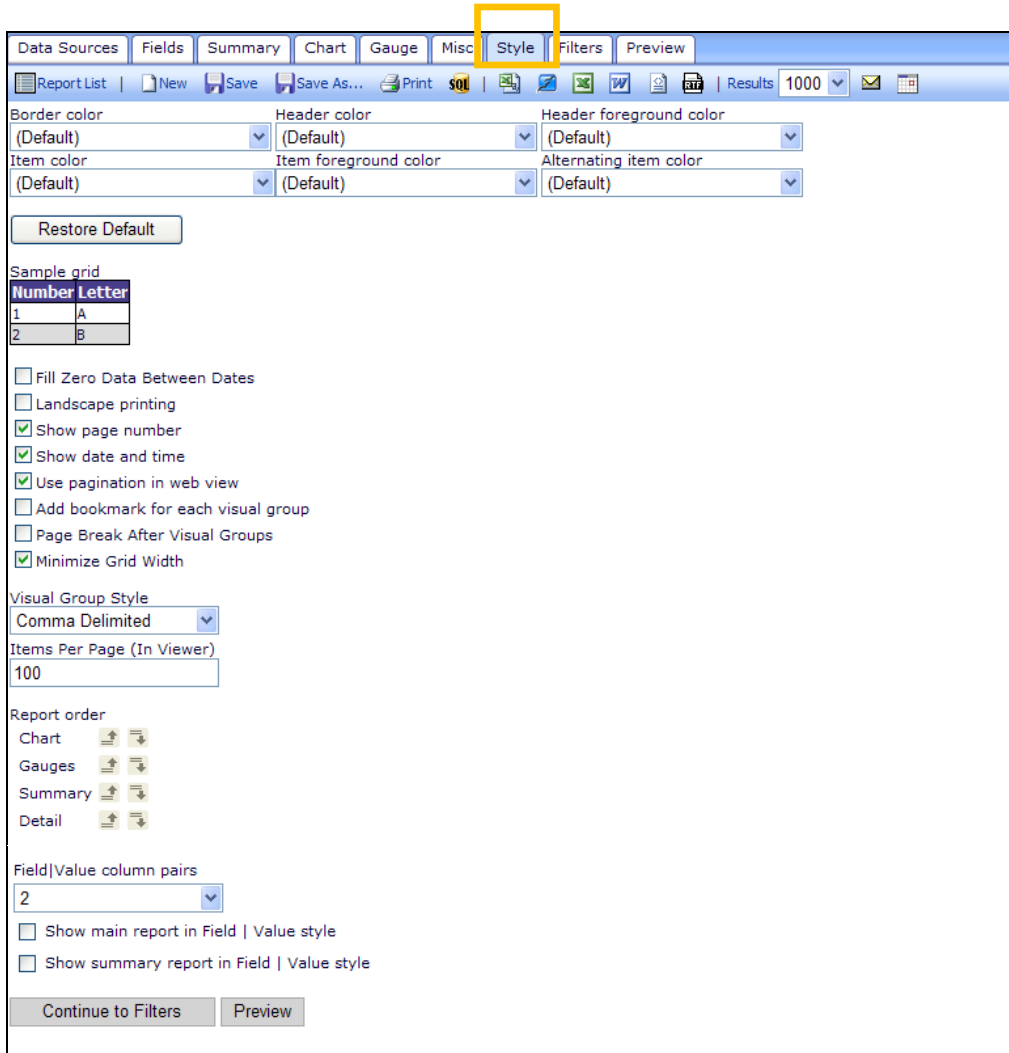
The following buttons display:

1. Continue to Style – allows the report designer to go to the 'Style' tab. The report designer can alternately click the 'Style' tab instead of using this button.
2. Preview – clicking this button generates a preview of the report results page, without saving the report. The report designer can alternatively click the 'Preview' tab instead of using this button.

Tab 7: Style



The Style step is optional. It allows the report designer to enter custom colors, set pagination, and minimize the appearance of the report on the screen.

Figure 40



The following options are available:

- Border color/Header color/Header foreground color/Item color/Item foreground color/Alternating item color – allows the report designer to select custom colors for each of these areas on the report results. When selected, the ‘Sample grid’ (shown below the ‘Restore Default’ button) reflects the color selections as a preview for the report designer.
- Restore Default button – allows the report designer to reset all the colors to the default colors, and reflects the default colors in the Sample Grid.
- Sample Grid – reflects the color selections and functions as a preview of the report results display.
- Checkboxes – a series of options, including:

- Fill Zero Data Between Dates: If there is a report being run that uses dates in a chart or report grid, and there is a value of '0' for a date, this option will make those '0' rows display. For example, if the report displays the number of manuscripts submitted by month, and there were 0 manuscripts submitted in February, without selecting this option February would not appear. Selecting this option causes February to appear with a value of 0.
- Landscape printing: Determines the orientation of the report when printed to a PDF.
- Show page number: If selected, the page number displays at the top of each page when printed to a PDF.
- Show date and time: If selected, the date and time the report was printed appears at the top of each printed page.
- Use pagination in web view: When a report is run where this is selected, the report displays pagination links on the results page (1-100, 101-200, etc.) to enable users to navigate through the result set.
- Add bookmark for each visual group: When Visual Grouping is used (see the 'Tab 2: Fields' section), bookmarks for each section are generated on the left side of the PDF.
- Page Break After Visual Groups: When Visual Grouping is used (see the 'Tab 2: Fields' section), each Visually Grouped set of data appears on a separate page in the PDF.
- Minimize Grid Width: Allows the report to take up the minimum amount of space on the screen, instead of expanding to fill the whole screen. Tip: this is a good choice for a report with gauges, as it will cause the gauges to wrap if selected rather than expand the page and require horizontal scrolling to see the results.
- Visual Group style
 - This choice is applied if the checkbox 'VG' was selected for a field (on the Fields tab). It governs the display of the visual group sub-headers.
- Items per page (in Viewer)
 - An integer value may be entered here. It governs how many rows are listed on the results page before a new page is created (causing the pagination links to be displayed).
- Report Order
 - The report designer can designate the order in which the Chart, Gauges, Summary report and Detail report are shown on the results page. These sections can be re-ordered by using the move up () and move down () icons.
- Field|Value column pairs
 - The values 1 through 4 can be selected from this drop-down box.

- This choice governs how many columns of field/value pairs appear on the results page. Example: Choosing 4 from the drop-down box causes 8 columns to appear on the results page – 4 field name columns and 4 associated value columns.
- NOTE: To apply this setting, one of the two checkboxes below must also be selected.
- Show main report in Field|Value style – causes the Field|Value column pairs configuration to be applied to the main (not summary) report.
- Show summary report in Field|Value style – causes the Summary report (if any) to be displayed using the Field|Value column pairs configuration.

The following buttons display:

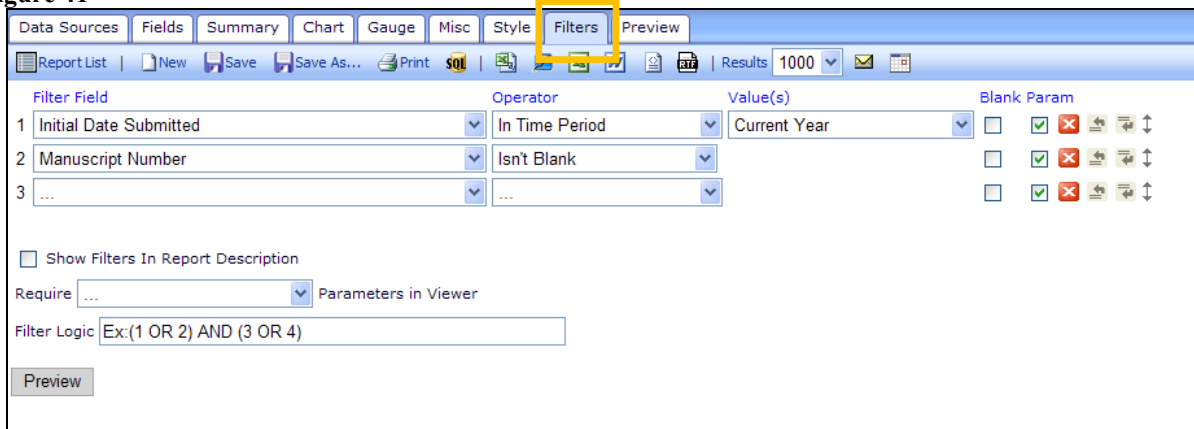
1. Continue to Filters – allows the report designer to go to the ‘Filters’ tab. The report designer can alternately click the ‘Filters’ tab instead of using this button.
2. Preview – clicking this button generates a preview of the report results page, without saving the report. The report designer can alternatively click the ‘Preview’ tab instead of using this button.

Tab 8: Filters

The 'Filters' tab controls which records will display in the final report. This step is optional, though typically used to limit the data returned. It allows the report designer to filter (limit) the report results based on the value of any field available for the report. This page is similar to the existing *Search Submissions* page.

NOTE: Configuring a filter on this page applies the filter to all the report results – the main report, summary report, chart and gauges.

Figure 41







The following options are available:

- Filter Field – a drop-down list allowing the report designer to select any field available for the report (per the 'Data Sources' tab).
Note: The field does not need to have been selected on the Fields tab, and does not need to appear on the results page.
 - Operator – the report designer can designate whether the Filter Field is greater than a value, equals a value, is within a designated time period (such as 'Last Year' or 'In the past'), contains certain text, equals multiple values, doesn't equal multiple values, equals one value [Equals (select)], doesn't equal one value [Doesn't Equal (select)], etc.
 - Values – depending on the selection in the Operator field, the Value column allows the report designer to either type in a value, or select from a list of values. Making a selection here limits the report to results that match the value (or don't match the value, depending on the operator). Leave the value set to [...] to search for any value. When combined with the Parameter setting (below), this allows the end-user to select the parameters rather than setting a pre-determined value to be used.
NOTE: To combine multiple filters, the filters should be configured first, and combined using the 'Filter Logic' entry box (see below).
 - Blank – select this box to return results with the value of blank (null).
 - Parameter – selecting this checkbox causes the filter configuration to be displayed on the report results page. The user running the report can change the filter and click the

‘Update Results’ button on the toolbar to see the results with the new filter.

NOTE: When filters are applied to a report, they do not display at the top of the ‘Preview’ page. They will only appear at the top of the Report results when the report is run, not previewed.

- Icons – The standard delete , add field above , add field below , and move  icons are displayed.
- Show Filters in Report Description – selecting this checkbox displays the values of each filter used to generate the report in the report’s descriptive text, but does not allow the user to change the filters. To allow the user to change the filters, select the ‘Parameter’ checkbox next to each filter you want the user to be able to change.
- Require drop-down box – making a choice in this drop-down box requires the end user to select a value for at least one, the first, or the first two filters when running the report. NOTE: To cause a filter to appear to the end user, the ‘Parameter’ checkbox must be selected for the filter.
- Filter Logic – to combine the filters in any way other than simple ‘AND’ logic, the report designer must type the filter logic into the box. For example, to combine three filters so that a result must match both filter one and two OR match filter three to appear in the results, the report designer would type: (1 AND 2) OR 3 (using the filter numbers). Parentheses and OR can also be used, as shown in the example above. NOTE: This field displays an ‘Ex:’ by default; this is an Example of how the field can be used. Filters with the ‘Ex:’ will be ignored.

The following button displays:

1. Preview – clicking this button generates a preview of the report results page, without saving the report. The report designer can alternatively click the ‘Preview’ tab instead of using this button