

CONFIDENTIAL AND PROPRIETARY

Release Notification

emEditorial Manager® ProduXion Manager®

Commerce Manager™

Editorial Manager/ProduXion Manager 10.2 General Release Notification 01/13/14 Draft – Subject to Change

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Document Change Log

Date	Version	Change
09/11/2013	Beta Release	Beta version
11/11/2013	Gamma Release	Updated Production Tracking Enhancements for clarity
01/08/2014	General Release	Added Proxy Registration Security Enhancements

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GENERAL ENHANCEMENTS

Changing Corresponding Author Information Notice

In EM v10.1, Authors who begin the New Submission process, may enter an Other Author on the Add/Edit/Remove Authors submission step, and they may designate that Other Author as the Corresponding Author of the submission. This may occur at times when an assistant is entering the initial submission, but the primary Author will be the person managing correspondence surrounding the submission. When an author other than the author entering the submission is designated as the Corresponding Author, the new Corresponding Author will be the person who has to approve the PDF before submitting to the publication.

New in EM v10.2, an enhanced "changing corresponding author" message is presented at the following points in the submission process:

• Add/Edit Authors pop-up page

When the 'Please select if this is the corresponding author' checkbox is selected/checked, a new warning message appears below this box alerting the logged in author that the newly selected Corresponding Author will be given access to the submission for approving the PDF:

	Add/Edit Authors
information and clicking the 'S	o contributed to your manuscript by entering all required ubmit' button.This journal requires that your co-authors number. They can obtain an ORCID number by
Cancel	Submit Submit and Add Another Author
First Name*	Kermit
Middle Name	
Last Name*	Frog
E-mail Address	
ISNI	
ORCID	Fetch
	(e.g.: 1234-1234-1234-123X)
PubMed Author ID*	159489
ResearcherID	
Scopus Author ID	
City	
State	
Zip or Postal Code	
Country*	BARBADOS
PLEASE NOTE: If ye Author, then once to the submission approve the PDF to	lect if this is the corresponding author ou continue with this author as the Corresponding you build the PDF you will no longer have access This author must then log into the system and o complete the submission of your manuscript. Submit Submit and Add Another Author

• Summary Following Attach Files

If all required information has been entered and there are no error messages displayed, and a new Corresponding Author has been selected, then a new message displays on the *Summary*... page warning the logged in Author that the newly selected Corresponding Author will need to review and approve the PDF once it is built.

mission	ng Attach Fil	es						
Listed below is the number of items to								
emove Authors	Online	Offline		Online	Offline			
Cover Letter	0	1	Abstract	0	0			
Author Agreement	0	0	Figure	0	0			
Manuscript	0	0	Table	0	0			
Audio	0	0	Video	0	0			
once you bui submission. Kermit Frog mi	Please note that because Kermit Frog is now the Corresponding Author, once you build the PDF you will no longer have access to the submission. Kermit Frog must log into Editorial Manager and approve the PDF in order to submit your manuscript to Editorial Manager. If you wish to switch the Corresponding Author, please return to the Add/Edit/Remove Authors step.							

• Corresponding Author Switch Confirmation Page

A new page is presented when the Author clicks the "Build PDF for Approval" button on the *Summary* page. This page gives the Author one last warning that the newly selected Corresponding Author is responsible for viewing and approving the PDF once the Author clicks the "Build PDF" button. He may still go back and change the Corresponding Author at this point if necessary.

PLEASE NOTE:	
FEEASE NOTE.	Because Kermit Frog is now the corresponding author, once you build the PDF you will no longer have access to the submission.
	Kermit Frog must log into Editorial Manager and approve the PDF in order to submit your manuscript to Editorial Manager.
	Are you sure you would like to proceed with Kermit Frog as the Corresponding Author?
	Build PDF Change Corresponding Author

TO CONFIGURE:

No configuration is required for this new feature. On upgrade to v10.2, Authors will see this new warning when they have selected an Other Author as the Corresponding Author on the 'Add/Edit/Remove Authors' step of the submission process.

Quick Links to System Administration Page

In EM/PM v10.1, Editors may have a "Go to" drop-down menu displayed in the Main Menu area, allowing them to navigate to the Search Pages (Submissions, Proposals, People) or between Publications (if configured).

New in EM/PM v10.2, Editors with "System Administration Functions" permission enabled will now have a new Quick Link called "System Administrator Functions". This Quick Link behaves like the existing link on the Editor's Main Menu, opening the System Administration pop-up page.

Partial Page display:

etitorial Manag	ʒer™			"Editorial Manager™		
HOME • LOG OUT • HELP • REGISTER • MAIN MENU • CONTACT US • SUBMITA M	UPDATE MY INFORMATION ANUSCRIPT + INSTRUCTION	JOURNAL OVERVI S FOR AUTHORS	E.M.	o to: Search Pa ole: Search Pa	ige	Emily
Important Message: Site un	der development. I	Do not use fo	or live manus	Cript Proposals	5	
Editorial Proposal M	enu			Quick Aco	ess ninistrator Functions	
Associate Editor Main Menu	Submissions W Original Complete 5 Search	<u>1 Review</u> <u>Complete</u> 3	2 Reviews Complete 0	3 Reviews Complete 0	4+ Reviews Complete 0	
	Editor 'To-Do' My Per	List nding Assignmen	its (17)			

The new Quick Link displays in a section entitled 'Quick Access', and displays below the 'Search Page' section and above the 'Publication' list (for Editors configured with the Cross-Publication Login feature). For example:

-- Search Page --Submissions Proposals People -- Quick Access --System Administrator Functions -- Publication --JXYZ JPRS

NOTE: Users will see only the appropriate items based on their permissions.

TO CONFIGURE:

No configuration is required to use this feature. The drop-down menu will appear if the user is configured with one or more 'Go To' Publications, is logged in under an Editor Role with one or more 'Search...' permissions, or has the 'System Administration Functions' permission enabled.

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Duplicate Submission Checking

In EM v10.1, Publications may configure a 'Set Number of Days for Duplicate Submission Check' option, which allows an Editor to be warned, through a visual prompt (\square), if the Author has submitted a manuscript to the Publication in the past {x} number of days. This check is only made against the Author's name and only when New Submissions are received by the Publication.

New in EM v10.2, Publications may choose to configure a more robust Duplicate Submission Checking feature, and apply this to only certain Article Types. When this new feature is enabled, then upon receipt of a New or Revised submission (or an Edited submission) of a configured Article Type, the Article Title of the triggering submission is used as a search argument against the Article Title and Abstract of all submissions already submitted to the publication, and the Author list of the triggering submission is used as a search argument against the Author lists of manuscripts previously submitted to the publication.

When enabled (in PolicyManager), the new Duplicate Submission Check query is run at the following Events:

- New Submission Sent to Publication
- New Child Submission Sent to Publication
- Revised Submission Sent to Publication
- Author Returns Submission to Publication
- Editor Approves Edited Submission

NOTE: The new Duplicate Submission Checking feature is only run when the above events are triggered going forward; new Duplicate Submission Check results will not display for existing submissions.

When the new Duplicate Submission Checking feature is run on a submission, three scores are returned for each similar submission, and an overall EM Duplicate Score is calculated. It is important to note that the EM Duplicate Score is a relative measure of the similarity between the triggering submission and the submissions returned as the results of the query. These scores are:

- Article Title Similarity 40% of the total score
- Author Similarity 30% of the total score
- Abstract Similarity 30% of the total score

A new <u>Duplicate Submission Check Results</u> Action Link displays for the submission in most Editor Folders (such as *New Submissions, New Submissions Requiring Assignment, Revised Submissions, Revised Submissions Requiring Assignment*). Next to this link, the highest "EM Duplicate Score" of all possible matches displays in parenthesis. If the Publication has configured a Duplicate Score Threshold in PolicyManager, and the highest identified Duplicate Score meets or exceed the threshold, the EM Duplicate Score will display in red text to visually alert the Editor.

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Sample New Submissions folder:

New Submissions - Mary François Smi	th, PhD					
Contents: These are the new submissions t	hat require a	Technical Check	. Use the up/	down arrows to change the sort order.		
Page: 1 c	of 1 (9 total su	bmissions)			Display 50	0 🗸
■ Action 🔺	Manuscript Number ▲▼	Article Type	Section/ Category	Article Title ▲▼	Author Name	Ini Sul
View Submission Duplicate Submission Check Results (39%) Details T Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Author Mapper LASTNAME Send E-mail Linked Submissions		Perspective		Demonstration of Duplicates	Kermit the Frog♥ ♥	Aug 4:2

Clicking the <u>Duplicate Submission Check Results</u> link opens the new *Duplicate Submission Check Results* page. This page displays up to 20 potential duplicate submissions, based on the comparisons between Article Title, Author List, and Abstract. These are listed in order from the highest "EM Duplicate Score" to the lowest (though only the highest EM Duplicate Score is displayed above the grid). For each submission in the results set, each of the three scores is displayed, with a visual bar graph representing the score. If the individual result score is over the configured threshold, the bar displays as red, otherwise it displays as green.

NOTE: Although the value is calculated and stored for each submission in the results set, only the highest score is displayed as the "EM Duplicate Score" next to the <u>Duplicate Submission</u> <u>Check Results</u> link, and on the *Duplicate Submission Check Results* page.

Sample page:

	ssion. The EM Dup	licate Score is	the highest weight	ed average for any of the subr	nissions displayed below.			
Potential Duplicate Su	Ibmissions						EM Du	plicate Score: 100
1anuscript/Submission	Initial Date					Article Title	Author	Abstract
Number SALLYDEV100-D-13-00005		Revision	Submitted to	Article Title Applications of Graphene in	Authors Buzz Aldrin, PhD; John Nash, PhD; Charlie Chaplin,	Similarity 100%	Similarity	Similarity
SALLYDEV100-D-11-00873	4:42PM Jan 30 2013 3:42PM	2	Journal With Editor	Technology Technology Constant for Visual Transparency of	PhD Buzz Aldrin, PhD; John Nash, PhD; Charlie Chaplin,	73%	100%	51%
SALLYDEV100-D-12-00043 /iew Submission Details		0	Under Review	Graphene Experimental Methods to Produce Graphene Nanoribhons	PhD John Nash, PhD; Charlie Chaplin, PhD; Richard Feynman, PhD	61%	49%	58%
SALLYDEV100-S-10-00345 /iew_SubmissionDetails	Oct 29 2012 11:34AM	1	Completed	Graphene-based nanotechnology in energy applications	John Henry, PhD; Charlie Chaplin, PhD; Richard Feynman, PhD	57%	51%	49%
SALLYDEV100-D-10-00230 /iew Submission Details	Aug 16 2012 4:23PM	o	Submitted to Journal	Graphene-based composite materials	Buzz Aldrin, PhD; John Smith, PhD; Charlie Chaplin, PhD	56%	48%	51%
SALLYDEV100-D-10-00345 /iew Submission Details		1	Completed	High-quality and uniform graphene films on copper foils	John Wayne, PhD; John Nash, PhD; Charlie Tuna, PhD	53%	51%	36%
SALLYDEV100-D-12-00343 /iew Submission Details	Nov 14 2012 2:06PM	0	Under Review	Experimental Methods to Produce Graphene Nanoribbons	John Nash, PhD; Charlie Chaplin, PhD; Richard Feynman, PhD	53%	46%	29%
SALLYDEV100-D-10-00345 /iew Submission Details		1	Completed	Flexible Touch Screens with Printed Graphene	Buzz Aldrin, PhD; John Nash, PhD; Will Smith, PhD	45%	53%	53%
ALLYDEV100-D-10-00230 /iew Submission Details	Jan 31 2013 4:42PM	2	Under Review	Two-dimensional material grapheney	Buzz Aldrin, PhD; Jonathan Fry, PhD	42%	51%	51%
SALLYDEV100-D-10-00345 /iew Submission Details	Aug 23 2012 9:32AM	1	Under Review	Graphene - A Material for all Seasons	Buzz Aldrin, PhD; John Nash, PhD; Mary Chaplin, PhD	39%	51%	26%
SALLYDEV100-D-13-00015 /iew Submission Details	Feb 28 2013 4:42PM	1	Submitted to Journal	Two-dimensional materials in Technology	Buzz Aldrin, PhD; John Adams, PhD; Charlie Tuna, PhD	39%	33%	43%
SALLYDEV100-D-10-00345 /iew_SubmissionDetails		2	With Editor	Experimential Methods in Technology	Buzz Aldrin, PhD; Nick Fry, PhD; Mary Tyler Moore, PhD	33%	33%	51%
SALLYDEV100-D-12-00023 /iew Submission Details	Nov 14 2012 2:06PM	0	Under Review	Experimental Methods in Nanoscience	James Madison, PhD; Charlie Sheen, PhD; Richard Feynman, PhD	33%	29%	48%
SALLYDEV100-D-10-00345 /iew Submission Details		1	Completed	Industrial Applications of Materials	Buzz Aldrin, PhD; Mary Chaplin, PhD	27%	51%	49%
SALLYDEV100-D-10-00230 /iew Submission Details	Aug 16 2012 4:23PM	0	Submitted to Journal	A study of composite materials	John Nash, PhD; Mary Chaplin, PhD	27%	48%	51%
SALLYDEV100-D-10-00345	Jun 30 2010 4:42PM	1	Completed	Large-Area Synthesis of High-Quality Films on Copper Foils	Jane Austen, PhD; Margaret Mitchell, PhD; Charlie Tuna, PhD	19%	16%	36%
SALLYDEV100-D-10-00230 /iew Submission Details	Jan 31 2013 4:42PM	0	Submitted to Journal	Trends in Toxicology	Dick Clark, PhD; Stephen Fry, PhD; Mary Adams, PhD	15%	16%	29%
SALLYDEV100-D-10-00345 /iew Submission Details		1	Completed	Applications in Neuroscience	Elizabeth Barrett, PhD; John Fry, PhD; Geraldine Chaplin, PhD	15%	16%	16%
SALLYDEV100-D-13-00130 /iew Submission Details	Jan 31 2013 4:42PM	2	Under Review	Applications of Computers in Education	Daniel Day Lewis, PhD; John Fry, PhD; Mary Madison, PhD	12%	16%	26%
SALLYDEV100-D-12-00245 /iew Submission Details		1	Under Review	Applications of Information Technology	Keith Moon, PhD; John Fry, PhD; Mary Chaplin, PhD	13%	15%	16%

For each submission in the list, the logged in user may see a <u>View Submission</u> link or a <u>Details</u> link allowing them to access the submission to confirm if this is in fact a duplicate of the submission. If an Editor is blinded to a potential duplicate submission, the <u>View Submission</u> and <u>Details</u> links are suppressed. Also, the word [REDACTED] is displayed in place of the Article Title and Authors of the similar submission.

When a submission has had the Duplicate Submission Check run against it, the <u>Duplicate</u> <u>Submission Check Results</u> link may also be displayed on the following:

Technical Check page:



Default Details page:

Details for Manuscript Number: Unassigned "Demonstration of Duplicates"							
Cancel Save Save and Close							
Manuscript	Notes Production Notes Editors Reviewers Alternate Reviewers Additional Information						
Additional Manuscript Details:	Add/Edit Additional Manuscript Details						
Corresponding Author:	Kermit the Frog , V , CONGO, THE DEMOCRATIC REPUBLIC OF THE Proxy						
Corresponding Author E- Mail:	bhopkins@ariessc.com						
Author Comments:							
Other Authors:	Jennifer Convertable,						
Author Questionnaire Summary:	View Author Questionnaire Summary						
Short Title:							
Article Type:	Perspective						
Section/Category:							
Keywords:							
Classifications:	This manuscript does not have any Classifications.						
Requested Editor:							
Technical Check:	Technical Check Information						
Initial Date Submitted:	Aug 14 2013 04:21PM						
Eultorial Status Date:	AUG 14 2015 04:21FM						
Duplicate Submission Check:	Duplicate Submission Check Results (39%)						
Current Editorial Status:	Received by Journal						

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File Inventory page:

	Michae	l Green (BO	File Inventory SNIA AND HERZEG					es II	(View Subr	nission	J)
download be used to CrossChee open to th	a zip file co o select or u ck, select th ne CrossChe	ntaining multiple ite inselect all the files. he file(s) you wish to eck login page (this	surrent version of the latest R ms, select the items using the Additional software (such as \ download and click the 'Cros window remains open in the b in CrossCheck, you may retu	e check boxes, and t WinZip) must be inst ssCheck' button. The ackground). Use you	hen click the 'Do talled on your co selected files w ur CrossCheck lo	ownload Zip f omputer in or vill be downlo ogin credenti	ile' button. Th der to unzip (aded to your als to sign in,	ne 'Che uncomp comput then up	ck All' and 'Cl press) the zip er, and a new pload the sele	lear All file. To v windo	l' links may o initiate ow will
If a check file. (less		t appear in the 'Sel	ect' column for a file, the file i	is no longer availabl	e. Click the Dow	vnload link in	the Action co	lumn fo	r more inforr	nation	about the
Downloa	ad Selections	as Zip File	CrossCheck	Duplicate Submis	sion Check Resu	<u>ults</u> (33%)			Close	lave a	and Close
■ Sub	mission Fi	les									
Check All Clear All		Item	Description		Item Family	File Name	•	Size	Modified	QC	Display On TF
	<u>Download</u>	Cover Letter	Cover Letter		Default	Demo Cove	er Letter.doc	25.5 KB	Apr 25 2012 4:24PM		
Upload	Companion	File									
Downloa	ad Selections	as Zip File							Close	Save a	and Close

TO CONFIGURE:

To enable the new Duplicate Submission Checking feature, first go to PolicyManager and click the newly named <u>Configure Duplicate Submission Check</u> link (formerly called <u>Set number of Days for Duplicate Submission Check</u>).



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The new page has two sections. The upper portion is where you can configure when the Duplicate Submission Checking feature should provide alerts.

Publications configured to use the existing "Duplicate Submission Check" feature will still have this feature enabled upon upgrade to v10.2. The upper checkbox "The same Corresponding Author has submitted a paper in the past $\{n\}$ days" will be selected/checked, and the previously configured number will be displayed in the $\{n\}$ box.

Below this option is a new "A similar paper has been previously submitted. Highlight the EM Duplicate Score when it is $\{n\}$ % or more" option. When this option is selected/checked, then if a manuscript (of a configured Article Type) with a similar title, list of authors, or abstract has been previously submitted, a 'Duplicate Submission Check Results' link will be displayed to users with permission. Clicking the link will display a list of similar submissions.

The lower portion of the page is where you may edit the instructions that will display to users on the *Duplicate Submission Check Results* page.



Once that is configured, you must configure Article Types for which the new Duplicate Submission Checking function must be used. To do this, go to PolicyManager, <u>Edit Article Types</u>, and edit the existing Article Types you wish to configure (or add a new Article Type). On the *Edit Article Type* page, select/check the new 'Duplicate Submission Check' option (displayed above the Author Parameters section).

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Edit Article	Туре	Cancel	Submit		
Article Type:	Perspective				
	Maximum Article Type na	ame is 75 characters.			
Family:	Regular Editor U	se Only:			
Hide W	/hen you Hide an Article ⁻	Type, the Article Type will be deactivated (not available	for new or revised m	anuscripts).	
Allow file	uploads from arXiv.org ser	ver			
Similarity Ch	eck:	Send Reviewer PDF on Initial Submission Send Reviewer PDF on First Revision Send Reviewer PDF on Final Disposition to Accept			You must also set up Automatic Transfer to a checking service on the Configure Similarity Check page. Editor and Publisher Roles can be configured to send files by Automatic Transfer from the File Inventory or Technical Check pages even if you do not enable the options on this page.
Duplicate Sul	omission Check: 🛛 🗌	Check for duplicate submissions to Editorial Manage			You must also enable the check for duplicate submissions on the Configure Duplicate Submission Check page.
AULIOI Faralli	eters	Eiret Revision		absoquent Revisions	
Number of days Revise Submis		0		0	Set this value to zero if you do not want to use Revision Due Dates.

To allow Editors or Publisher Roles to view the new Duplicate Submission Check results, go to RoleManager, Editor Role or Publisher Role, and edit the role(s) you wish to give this new permission. In the 'General Searching and Viewing' area, select/check the new "View Duplicate Submission Check Results" option.

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Partial Page; Editor Role Definition:

~¥	Edit Role	Definit	ion		
Role Name:* M	lanaging Editor				
M	aximum Role na	ame is 40 d	characters.		
Check the functions that this role is permitted to perform. by holding down the					or deselect multiple terms
	Expand All	<u>Collaps</u>	<u>e All</u>		
New Submissions					
Editor Assignment					
Reviewer Invitations					
Editor Decisions					
Proposals/Commentaries					
General Searching and Viewi			itorial 🗸		
Use Editorial Details Layout	10.0 Copy of]	
Search All Manuscripts					
Search Only Assigned N	Vanuscripts				
Share Saved Searches					
View Linked Submission	n Groups				
Create/Edit Linked	Submission Gro	ups			
Set Active/In	active Status or	n Linked S	ubmission Groups		
View COS Scholar University	erse Author Pro	files			
Search Similar Articles i	in MEDLINE				
Search Author Publication	ons in MEDLINE	Ξ			
Initiate Similarity Check					
View Similarity Check R	esults				
View Duplicate Submiss	ion Check Res	ults			
Dibilographic Search					
 AuthorMapper (with 	n first initial at e	nd)			
✓ Author Mapper (LA)	STNAME)				
✓ View Editorial Status His	story				

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Partial Page; Publisher Role Definition:

Edit Role Definition				
Role Name:* Production Team				
Check the functions that this role is permitted to perform.				
Expand All Collapse All				
⊞ System Conversion Tasks				
□ General Searching and Viewing				
✓ View Submission				
✓ View Manuscript Details				
Use Editorial Details Layout Default Editorial				
View Production Notes				
Edit Production Notes				
✓ View Manuscript Notes on Manuscript Details				
Edit Manuscript Notes on Manuscript Details				
☑ View Editorial Correspondence History				
✓ View Additional Manuscript Details				
Edit Additional Manuscript Details				
☑ Download Source Files				
Download Companion Files				
☑ Upload, Hide and Restore Companion files				
Initiate Similarity Check				
View Similarity Silecti Results				
View Duplicate Submission Check Results				
✓ View Linked Submission Groups				

A new "Duplicate Submission Check" option is added to the default *Editorial Details* layout on upgrade to v10.2. To add this new option to custom *Details* layouts, go to PolicyManager, and click the <u>Define Details Page Layouts</u> link in the 'General Policies' section. Click the <u>Edit</u> link for the custom layout to which you wish to add the new option, and then click the <u>Select Items to</u> <u>Display</u> link. Select/check the box next to the new 'Duplicate Submission Check' option in the "Links" section.

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Select Items to Display for EVERYTHING		
Select the information to appea * Items marked with an asterisl give them the additional permis	k are subject to additional permissions, which may mean that some users will not be able to view them until you	
	Expand All Collapse All	
🗆 Lir	ıks	
	✓ Blinded Editors *	
	Technical Check *	
	Additional Manuscript Details *	
_	Similarity Check *	
	☑ Duplicate Submission Check *	
L	Select Submissione Flags *	
	✓ File Inventory *	
	Publish Information	
	✓ Transmittal Form *	

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Automatic CC and BCC on All Letters

In EM/PM v10.1, the ability to configure specific e-mail addresses that would be automatically cc'd and/or 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, the "Decision" letter family, and the "Production" and "Production Reminder" letter families.

New in EM/PM v10.2, this feature is added to all Letter Families for use in any letter. System Administrators may define one or more e-mail addresses to be automatically carbon copied or blind carbon copied for any letter.

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, according to the configuration.

ustomize eviewer	Cancel Preview Letter Save
nvitation Letter	
obert Referee	From: "The DEMO Journal" <bhopkins@ariessc.com></bhopkins@ariessc.com>
REVIEWER)	To: Robert Referee, MD
-	Letter Purpose: Reviewer Invitation
	Letter Subject: Reviewer Invitation for Testing Section/Category
	next to cc: or bcc below. Multiple e-mail addresses can be included, separated by semicolons (;).
	cc: bcc: Editors Assigned to Manuscript
	cc: bcc: Editors Assigned to Manuscript
	cc: bcc: Editors Assigned to Manuscript
	cc: bcc: Editors Assigned to Manuscript
	cc: bc: Editors Assigned to Manuscript □ □ungle Book, ob (Staff Editor) ✓ bhopkins@edmgr.com ✓ trash2002@ariessys.com

Sample page; new options displayed:

TO CONFIGURE:

In PolicyManager, Edit Letters, select the letters 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 'Reviewer Invitation' Letter			
	Cancel Save		
Letter Purpose:	Reviewer Invitation		
Subject:	Reviewer Invitation for %ARTICLE_TITLE%		
Letter Family:	Reviewer Invitation		
Sender's E-mail Address:	● "The DEMO Journal" <bhopkins@ariessc.com></bhopkins@ariessc.com>		
	O Use Corresponding Editor's E-mail address		
O Use Corresponding Production Editor's E-mail address			
Additional Recipients			
any cc: re Recipient	s of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and cipients s of a bcc: copy will not be revealed to any other recipients, but will be revealed to the d able to see the sender, the primary recipient(s) and any cc: recipients		
Automatically	cc: bcc:		
Send copies to the following addresses: (Multiple addresses may be entered, separated by a semicolon) cc: bcc:			
Letter B dy:			
	beginning with a number sign (#)		

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

Enhanced Discussion Topic Templates

EM/PM v10.1, Publications may configure Discussion Topic Templates to be used by Editors as a starting point for creating a new Discussion Topic. Discussion Topic Templates can be used 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.

New in EM/PM v10.2, additional Discussion configurations are moved from the Configure Discussion Forum Settings page to the Add/Edit Discussion Topic Templates page. This allows publications to make Discussion Topic-specific configurations, such as selecting letters that are sent, or pre-configuration participant access options. These settings are particularly useful when using the new Automatic Discussion Initiation feature (see the Automatically Initiate Discussions section of these Release Notes).

TO CONFIGURE:

On upgrade to v10.2, every site has a "Master Topic Template" identified. For publications with only the "Default Topic Template" defined (created on upgrade to v10.1), this will be marked as the "Master" on upgrade. For Publications with multiple Topic Templates created, a new "Master Topic Template" will be created on upgrade. NOTE: The Topic Template marked as "Master" cannot be removed from the system or hidden, and the designation of "Master" cannot be changed to another Template. The configuration of this Template can be modified.

Listed below are t	Configure Discussion Topi	-	w template, click
the 'Add' button.	(more)		
	rs to choose a Discussion Topic Template on the In s can either type in a Topic and Initial Comment, o comments boxes.		
Save Changes			
	bbA		
Order	Description	Action	s
1	Default Topic Template	Remove	Edit
2	Second Opinion - Outright Reject?	<u>Remove</u>	Edit
3	Graphic Specialist - Check Figures	<u>Remove</u>	Edit
4	Comment on Draft Decision Letter	<u>Remove</u>	Edit
5	Need More Reviewers	Remove	Edit
6	Master Topic Template		<u>Edit</u> (Master)
Update Order			
	Add		
	Set Discussion Deep Link Exp	iration	
	Back to PolicyManager		

If the publication does not wish to create multiple Topic Templates, you can just leave the default master template as is.

On upgrade to v10.2, the following settings are moved from the *Configure Discussion Forum Settings* page (re-named *Set Discussion Deep Link Expiration* in v10.2) to the *Add/Edit Discussion Topic Template* page:

- Participant Permission Checkboxes
 - Specify default permissions for participants which may be modified by the user when adding participants to a discussion
- Access to 'Details' Link
 - Specify whether participants should have access to a 'Details' link in their Active Discussions folder and on the Discussion page.
 - Select the Details page layout that participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts'.
- Select Discussion Forum Letters
 - Select the letter to send when asking Editors to participate in a Discussion Topic.
 - Select the notification letter to send when comments are posted in a Discussion Topic.
 - Specify whether to send notification letters when comments are posted to only the Discussion Topic Initiator or to all participants.



text is optional; you are not required to	be pre-populated on the Initiate Discussion page when users select this template. All of th enter anything in these fields. If you enter text for Topic and/or Initial Comments and do n the Initiate Discussion page, select the appropriate checkboxes below.	
Editor is selected to participate in a disc permissions on the Initiate Discussion,	In checkboxes if you want the permissions to be automatically selected by default when an cussion thread. Note that discussion thread initiators can manually select/de-select these Add Participants and Re-Open Discussion pages for individual Editors as needed. The er the permission checkboxes are selected or unselected by default on the page.(less)	
Discussion Topic Template Name	Insert Special Characte	
	Second Opinion - Outright Reject?	
'Initiate Discussion' Page Custom Instructions		
Торіс	Second Opinion	
	Allow user to modify Topic name when initiating a discussion	
Initial Comments	Please let us know within 2 business days if you think this paper meets the stringent criteria for our publication. If yes, please suggest the best Editor to handle this new subject matter. If not, is it better suited for one of our sister publications? If so, please name the publication for which this paper would be better suited.	
	I Allow user to modify Initial Comments when initiating a discussion	
Default Participant Permissions	View Reviews and Comments	
	Download Files (source and companion)	
	View Draft Decision Letter	
Access to 'Details' Link	Display 'Details' link in Submissions with Active Discussions folder and on Discussion page.	
	Select the Details Page Layout that participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts.'	
	Editorial Details Layout Confgured for the Editor's Role	
Discussion Letters	Select the Letter to send asking Editors to participate:	
	None	
	Select the notification letter to send when comments are posted: Discussion Forum - Item Posted 😪	
	Notify discussion initiator only	
	O Notify all active participants	
	1 Topic Template, it will no longer be available for selection on the initiate Discussion page	

NOTE: Discussion Topic Templates may not be Removed if any Discussion has been created using that Topic Template (even if the Discussion is closed).

NOTE: Discussion Topic Templates may not be Hidden if any Discussion has been created using that Topic Template (even if the Discussion is closed).

Automatically Initiate Discussions

In EM/PM v10.1, publications may 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. Editors with "Initiate and Manage Discussions" permission may Initiate a Discussion Topic at any point during the peer review process by clicking the <u>Discussions</u> link in various folders or from *Details*.

New in EM/PM v10.2, Publications may configure Discussions to be automatically initiated when an Invited Editor (of a configured Role) accepts an invitation to handle the submission. Publications may configure specific Article Types to have Discussions automatically initiated when Editors with selected Roles accept invitations to handle submissions. When the Discussion is automatically initiated, it is set up as follows:

- The Editor who accepted the invitation becomes the discussion participant.
- The Editor who invited the Editor becomes the Discussion Initiator (NOTE: This Editor Role must have "Initiate and Manage Discussions" permission enabled).
- The Discussion is based on the Topic Template selected for the 'Article Type/Editor Agree to Assignment' combination in PolicyManager.
- A letter (configured on the Discussion Topic Template) is sent to the Editor participant alerting them that he has been asked to participate in the discussion. NOTE: No letter is sent to the Initiator.

The Discussion Initiation functionality happens automatically "behind the scenes"; the Discussion Initiator does not need to take any action. Once the Topic is started, the Discussion Initiator may manage the Discussion Topic as usual (add/remove participants as desired, conclude the Discussion Topic, initiate another Discussion, etc.), and participants may read and post comments.

When multiple Discussion Topics are initiated automatically, a submission may have multiple discussion threads with the same:

- Topic name
- Discussion initiator
- Date Initiated

To assist in distinguishing between these Discussion Topics when users access the *Discussions* page, a new column is displayed entitled "Initial Participant". This column will display the Invited Editor, as this is the initial participant in an automatically initiated discussion. This column is empty for Discussions started manually.

Action	Topic	Last Post Date	Posted By	Discussion Status	Date initiated	Initiated By	Initial Participant
<u>View</u>	Provide Opinion	Aug 08 2013 02:25PM	Mary François Smith, PhD	Open	Aug 07 2013 02:06PM	Edward Editor, MD	Annie The Dog, PhD

TO CONFIGURE:

To configure Automatic Discussion Initiation, go to PolicyManager and click the <u>Configure</u> <u>Automatic Discussion Initiation</u> link in the 'Discussion Forums' section.

Expand A	Collapse All
Registration and Login Policies	
Status Policies	
Submission Policies	
Additional Data Policies	
Editor Assignment Policies	
Suggest Editor Policies	
Reviewer and Editor Form Policies	
E-mail and Letter Policies	
General Policies	
Discussion Forums	
Set Discussion Deep Link Expiration	on
Configure Discussion Topic Templa	ates
Configure Automatic Discussion In	itiation

Every Article Type configured for the Publication is listed in the 'Article Type' column on the left of the *Configure Automatic Discussion Initiation* page. To the right of this column is one column for each ActionManager Event that may be configured to automatically initiate a Discussion. NOTE: In v10.2, only the 'Editor Agree to Assignment' event may be configured to automatically initiate a discussion.

Set/check the 'Initiate Discussion Automatically' for the Article Type / Event combination for which you wish to set this option. Below the checkbox is a list of all Editor Roles configured to "Receive Assignments/Receive Assignments in 'New Assignments' Folder" (the exact permission depends on whether the publication is using the 'Suggest Editor' Feature). The Editor Roles are listed in alphabetical order. Select which Role(s) you wish to be the trigger for

a Discussion. NOTE: This Editor Role will not be set as the "Initiator" of the Discussion, but their accepting of an Invitation will trigger the event that creates the Discussion.

Next, select the Discussion Topic Template from which the Discussion will be automatically initiated.

	Configure Automatic	Discussion Initiation	
selecting the checkbox 'Initi discussion is initiated only if	Article Type, please specify whether to initi ate Discussion Automatically'. Then select a user with one of these Editor Roles trigg ad manage discussions. When a discussion	one or more Editor Roles and a discussio ers that ActionManager event, and the Ed	n Topic Template. A ditor who invited this Editor
	Cancel	Submit	
	ActionManager Event	Editor Agree to Assignment	
	Article Type		
	Original Study	Initiate Discussion Automatically Editor Roles: <u>Select All Clear All</u> Associate Editor Editor-in-Chief Staff Editor Topic Template: Please Choose a Topic Template Please Choose a Topic Template	
	Letter to the Editor	Please choose a lopic remplate Default Topic Template Second Opinion - Outright Reject? Graphic Specialist - Check Figures Comment on Draft Decision Letter Need More Reviewers Master Topic Template	

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Ability to Send Electronic Calendar Reminders when Assigning Reviewers

In EM v10.1, certain due date letters for Authors and Reviewers can be configured to include an electronic calendar entry that the recipient can save into any calendar that supports the iCalendar file format standard (e.g. Outlook, iCal, Google Calendar).

New in EM v10.2, the option 'Reviewer Assigned' is added to the list of configurable due date triggers. When this new option is selected/checekd, then an iCal file is attached to the letter configured for the "Reviewer Assigned (Not Invited)" event in ActionManager

As with the existing electronic calendar functionality, when the user receives the letter with the calendar event attachment, the event can be added to his or her electronic calendar by simply opening the file.

TO CONFIGURE:

To enable Calendar Entries to be sent with Reviewer Assignment letters, go to PolicyManager and click the <u>Configure Electronic Calendar Due Date Preferences</u> link. Select/check the box for the new "Reviewer Assigned" option.

Electronic Calendar Due Date Configuration
Letters can be triggered at the following points related to due dates. Select the trigger points for which an electronic calendar event should be attached to the responsible person's e-mail notification. When the user clicks the attachment, the due date will be added as an all day event to his or her local electronic calendar (for calendar programs which recognize the iCalendar file format - e.g. Outlook, iCal, Google Calendar).
Note: In order to use this feature, letters must be also be configured to be sent at the appropriate juncture.
Cancel Submit
Author Agrees to Submit Invited Paper (calendar event recipient: Author)
Invited Paper Due Date Changed (calendar event recipient: Author)
Author is Notified of a Revise Decision (calendar event recipient: Author)
Revision Due Date is Changed (calendar event recipient: Author)
Author Declines to Revise (calendar event recipient: Author)
Declined Revision is Reinstated (calendar event recipient: Author)
Keviewer Agrees to Keview (<i>calendar event recipient: kevie</i> ver)
Reviewer Assigned (calendar event recipient: Reviewer)
Review Due Date Changed (calendar event recipient: Revier (er)
Reviewer Uninvited/Unassigned (calendar event recipient: Reviewer)
Review Assignment Terminated (calendar event recipient: Reviewer)
Cancel Submit

NOTE: This option is not selected/checked on upgrade.

Editor Role Designation Restriction

In EM v10.1, Editor Roles may be configured with permission to designate Editor Roles to users via the *Search People – Update Information* page. Editor Roles are configured with varying degrees of permissions (based on configurations in RoleManager). There may be times when the Editorial Staff may create Editor Roles with minimal permissions, such as to assign to "guest" Editors. There may be times when a non-Editorial Staff user with an Editor Role should be able to assign these "Guest" roles to other users, but not assign other Editorial roles to users.

New in EM v10.2, the existing "Change Editor Role Designation" in Editor RoleManager is enhanced with a 'to/from' selector box, allowing the role to be restricted to changing only those roles selected. For example, if a publication has 5 Editor roles configured, and "Editor Role 2" is given permission to "Change Editor Role Designation to/from", with "Editor Role 3" and "Editor Role 4" selected, then a user with Editor Role 2 will be able to change Editor Role Designations for:

- Any user with no Editor Role to have one of the two configured Editor Roles
- Any user with one of the configured Editor Roles already to the other Editor Role, or "None"

	User Information
Search People - Update Information	The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.
To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.	User Name * Rosie Password * Password Rules The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.
Ms. Rosie Jetson 🏷 Proxy-Registered: Apr 16 2008 09:24AM (Data Unconfirmed by User) Last Modified: Jan 27 2010 04:15PM	Default Login Role: Author Default Login Menu Editorial Menu Available as a Reviewer? Yes ● No ● Board Member? Yes ● No ● Forbidden as a Reviewer? Yes ● No ● Reviewer Role * Demo Reviewer ♥
Send Username/Password	Publisher Role None Editorial Role None Editor Description None Associate Editor Associate Editor Report Admin Role Staff Editor

Sample page; user has no Editor Role; logged in user may assign from one of three roles:

Sample page; user has a role configured in the logged in Editor's "Change Editor Role Designation to/from" list:



Sample page; user has a role NOT configured in the logged in Editor's "Change Editor Role Designation to/from" list:

	User Information	Insert Special Character
Search People - Update Information		The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.
To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.	User Name * Password *	buttercup ******** Password Rules The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.
Dog Buttercup Swatski ♡ Proxy-Registered: Jul 20 2005 02:27PM (Data Verified by User) Last Modified: Aug 06 2013 11:39AM	Default Login Role: Default Login Menu Available as a Reviewer? Board Member? Forbidden as a Reviewer? Reviewer Role *	Editor V Editorial Menu V Yes No O Yes No O None
Send Username/Password	Editorial Role *	Editor-in-Chief

TO CONFIGURE:

To restrict the Editor Roles available for selection for Editors who can assign roles, go to RoleManager, Editor Role, and edit the roles for which you wish to restrict "Change Editor Role" permission. In the 'Viewing and Editing People Data' section, select/check the "Change Editor Role Designation to/from" sub-option under the "Search People" option. In the associated Selector Menu, select the Role(s) you with to allow this Editor Role to change to/from.

NOTE: On upgrade to v10.2, all Editor Roles with the existing "Change Editor Role Designation" permission enabled will have "ALL EDITOR ROLES" selected (the top selection on the Selector Menu).

Edit Role Definition	
Role Name:* Editor-in-Chief	
Maximum Role name is 40 characters.	
Check the functions that this role is permitted to perform. Note : in boxes with multiple rows displayed, you may select or deselect multiple terr by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.	ns
Expand All Collapse All	
Editor Assignment	
Reviewer Invitations	
Editor Decisions	
Proposals/Commentaries	
⊞ General Searching and Viewing	
Edit Submission	
Discussion Forums	
E-mail	
□ Viewing and Editing People Data	
Search People	
✓ View/Change Username and Password	
Send Username and Password	
☑ Change E-mail Address	
Change Preferred Method of Contact	
✓ Change Editor Role Designation to/from : ALL EDITOR ROLES Managing Editor Editor-in-Chief Associate Editor Report Admin Role	
inactivate Users	

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SUGGEST EDITOR ENHANCEMENTS

Editor Selection Summary Enhancements

In EM v10.1, publications may use the 'Suggest Editor' feature for inviting Editors to handle a submission. Using this feature, a set of Editors is selected to be invited to handle a paper, and when one of those Editors accepts the assignment, the remaining Editor Invitation Queue is closed out. When the user creating the Editor Queue is presented with a list of possible Editors to be invited, these Editors are listed in descending order by number of classification matches, or (if the publication is configured) in order based on the "Relevance Ranking" of Classification matches – where the Editor's personal classifications are a match to those identified on the submission. The publication Administrator can configure various parameters for this feature, including the number of candidates to display on the *Editor Selection Summary* page and the number of those Editors to be "selected" by default when the list displays. If the desired Editors is not easily located in the list (in the case where publications have a large number of Editors), the user may search for a specific Editor using a simple search mechanism (limited to 'Last Name' 'contains').

New in EM v10.2, the Suggest Editor feature is expanded to allow Publications to determine if Editors should be displayed based on the highest number of Classification Matches (or Relevance Ranking if the publication is also using Relevance Ranking), if no Editors should be displayed or pre-selected (forcing the assigning Editor to search for the appropriate Editor(s)), or if all Editors available to receive assignments should be displayed in alphabetical order on the *Editor Selection Summary* page. Further, the search mechanism is expanded to facilitate more robust searching of Editors.

On the *Editor Selection Summary* page, the system suggests a list of the 'best' Editor candidates based on the configuration in PolicyManager (see the 'To Configure' section below). When the Editor list displays based on the Relevance Ranking (or the highest number of classification matches if the publication does not use personal classification rankings), then the number of displayed Editors is based on the configuration in PolicyManager. New in v10.2, the 'Number of Editor candidates displayed on page' can be set to zero (0), which may be more useful for publications with a large number of Editors. When this is configured, Editors will see a new "Search for Editors" tool. Users may search for eligible Editors using any of the following options:

- Last Name
- First Name
- Editor Role
- E-mail Address
- Position
- Department
- Institution
- City
- State
- Country
- Personal Classifications

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- Personal Keywords
- Secondary Last Name
- Secondary First Name

		Editor Sel		rry - Manuscript M Kermit the emonstration of I Manuscript Detai	Resend Email"	L-D-13-00004	
Below is a	list of suggested ca	indidates based on	classification matches w	with the manuscript. (more	.)		
(1) CATA	ript Classification RACT; (2) ANATOM		RY (eye);	м	lanuscript Keywords		
Search	or Editors	Ins	ert Special Character			Value Options	
(Criterion		Is/Is not	Selector	Value		
	Last Name	v	is 💌	Begins With]		
		V		Begins With			Add
		×			Search		bbA

When search results are returned, the user can select one or more Editors from the results list and click the 'Add to Queue' button. Alternately, the Editor may select one Editor and click the 'Assign Editor Now' button to assign the Editor rather than invite via the Suggest Editor method.

Search for Editors – Results:

		Sear		Mary François Testing Demon	stration 10.2"	r: DEMO-100-72	2		
				Manuscript D	etails Þ 🕅				
Listed I	alow are the Editors that	t match your search criteria. S	elect the one(s) you wan	t and click the 'Add to O	ueue' hutton. Your selectio	ns will be added to the top	of the queue		
Listeu t	elow are the Eultors that	i materi your search chteria. S	elect the one(s) you wan	it and thek the Add to Q	dede button. Tour selectio	is will be added to the top	of the queue.		
Manu	script Classifications				Manuscript Keywords				
	-) anterior segment; (4) lids; (5) Growth & Developmer	nt;					
Searc	h for Editors								
		Insert S	pecial Character				Value Options		
		<u>1100100</u>	<u>pectal character</u>				<u>value options</u>		
(Criterion		Is/Is not	Selector	Value	:)	
~	Last Name	~	is 🗸	Begins With 🗸	ed			V	
								Add	
	Clear Search								
				1	1				
			C	ancel Add to Queue	Assign Editor Now				
		Page: 1 of 1 (8 total E	ditor candidates)			Display 1	0 🗸 results per pa	ge.	
Selec	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations	Available during next 300 days	
✓	Ann - Editor	Allie Gator Editor		4	2	7	0	Yes	
	Editor-in-Chief	Edward Editor, MD	Duke Medical School	2	1	88	0	Yes	
	Associate Editor	Ellen Editor		2	1	12	0	Yes	
	Associate Editor	Eric Editor		0	<u>0</u>	3	0	Yes	
	Managing Editor	Joe X Editor, PHD	University of Alberta	0	<u>0</u>	0	0	Yes	
	Managing Editor	Sally Editor		2	1	1	0	Yes	

Cancel Add to Queue Assign Editor Now

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Confidential – Subject to change – Copyright © 2014 Aries Systems Corporation When the feature is configured to display all available Editors in alphabetical order, the logged in Editor may select as many Editors in the list as she wishes. These Editors will then create the Queue. When the user confirms the candidate list, the first Editor(s) in the list is (are) invited immediately (based on the configuration in PolicyManger). As with the existing Suggest Editor feature, any remaining Editors in the Queue may be automatically invited on a staggered schedule (as configured in PolicyManger) until all invitations have been sent out. If at any point an Editor declines an invitation, the next available Editor in the queue is automatically promoted (invited) in his place.

As soon as one Editor accepts the invitation to handle the paper, all outstanding invitations and candidates in the queue are automatically closed out, and no additional Editors are invited for that submission.



Sample page: all Editors displayed in the Candidates grid:

TO CONFIGURE:

To enable the 'Suggest Editor' feature for your publication, contact your Aries account representative.

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To determine if Editors should be displayed based on Classification Matches/Relevance Ranking in the system, if the user is required to search for Editors (zero Editors are displayed in list), or if all Editors should be displayed on the Editor Selection page, go to PolicyManager, <u>Configure</u> <u>Suggest Editor Preferences</u>, and select the desired radio button in the 'Editor Selection Summary Options' section.

NOTE: The 'By classification matches' option is selected by default. When you select 'List all Editors', the 'Number of Editor candidates displayed on page (maximum 300)' and the 'Number of candidates selected by default' settings are automatically grayed out/disabled on the page; all available Editors will be displayed in Alphabetical Order.

	Configure Suggest Editor Preferences
E	ditor Selection Summary Options
Nun	play candidates: O By classification matches O List all Editors nber of Editor candidates displayed on page (maximum 300) 50 nber of candidates selected by default 9 nber of invitations to be sent immediately when queue is confirmed 1
B	atch Parameters Turn Off Batch Invitation Process (If this box is selected, Editors in the queue will be automatically promoted when another Editor declines, even if the batch process is turned off.)
invi	er first automated batch if within 12 hours of initial invitations sent. If the initial tations were sent less than this number of hours before the next batch cycle, that cycle is uped and the next invitations are sent in the following batch cycle.
Nun	nber of invitations to send in first batch cycle 2
Nun	nber of days between automated batches 1
Nun	nber of invitations to send in second batch cycle 3
Nue	nber of invitations to send in all subsequent batch cycles 3

To require that users search for Editors rather than be presented with a list from which to select candidates, select the 'By classification matches' only radio button, and set the 'Number of Editor candidates displayed on page' to "0". When this is set to "0", the 'Number of candidates selected by default' option must be set to "0" as well.

NOTE: This option may be more useful for a publication with a large number of Editors; publications with a small Editor pool may prefer to list some/all candidates ranked in order of "highest suitability".

To present a list of candidates, but to not have any selected by default, set the 'Number of candidates selected by default' to "0", but enter a number in the 'Number of Editor candidates displayed on page' field.

Editor	Selection Summary Options
Number	candidates:
Number	of invitations to be sent immediately when queue is confirmed 1
Defer fi	n Off Batch Invitation Process (If this box is selected, Editors in the queue will be automatically promoted when ther Editor declines, even if the batch process is turned off.) rst automated batch if within 12 hours of initial invitations sent. If the initial invitations were sent less
followin	s number of hours before the next batch cycle, that cycle is skipped and the next invitations are sent in the g batch cycle.
	of invitations to send in first batch cycle 2
	r of days between automated batches 1
	of invitations to send in second batch cycle 3
Number	of invitations to send in all subsequent batch cycles 3

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Customize Suggest Editor Invitation Letters

In EM v10.1, publications may use the 'Suggest Editor' feature for inviting Editors to handle a submission. In this feature, a set of Editors are invited to handle a paper, and when one of those Editors accepts the assignment, the remaining Editor Invitation Queue is closed out. When Editors in the Queue are invited, they receive the default invitation letter configured for the event 'Editor Invited for Assignment'. There is no opportunity to customize these letters; the letter is sent as configured in Edit Letters in PolicyManager.

New in EM v10.2, users configuring the Editor Invitation Queue are given the opportunity to customize the Invitation Letters at the time the Queue is created, or when Editors are added to an existing Queue. Users may also return to manage an existing queue and customize the letters to Editors who are sitting in the queue.

When at least one Editor is selected in the Candidates grid, then two new buttons are available:

- Customize Letters & Submit Queue Clicking this button takes the user to the new *Editor Queue Confirm Selections and Customize Letters* page
- Submit Queue without Customizing Letters Clicking this button takes the user to the existing *Editors Invited Confirmation* page; the v10.1 Suggest Editor process occurs (the first Editor(s) are invited, and the Queue is created with the remaining Editors).

elect All / <u>Clear All</u> Display 500 💙 results per											
Update	Invitation Orde	r C	ancel	Custo	nize Letters & Submit Queue		Submit Queue without Customizing Letters			Assign Editor Now	
elect	Invitation Order	Editor Role	Editor	ame	Institution	Relevance Kanking	Classification matches	Current Assignments	Open Invitations	Available during next 30 days	
▼	1	Associate Editor	Anthony MD 🕅 🕻		Harvard Medical School	0	٥	1	2	Yes	
		Staff Editor	<u>lungle B</u> V	ook, oh		0	٥	1	2	Yes	
✓	2	Associate Editor	Annie Th PhD 🕅	e Dog,		0	٥	11	2	Yes	
		Editor-in-Chief (This editor is already assigned to the current submission)	Edward B	<u>Editor,</u>	Duke Medical School	0	٥	49	1	Yes	
⊻	3	Associate Editor	Emily Ed	itor, MD	University of Colorado	0	<u>0</u>	11	2	Yes	
		Editor-in-Chief	<u>I yndon H</u>	iolmes		0	٥	1	1	Yes	
		Editor-in-Chief	<u>Smartbo</u> Smartbo			0	٥	1	1	Yes	
		Editor-in-Chief	<u>Buttercu</u> Swatski	_		0	<u>0</u>	1	o	Yes	

Partial page display: Candidates Grid with new options:

The *Editor Queue – Confirm Selections and Customize Letters* page displays a list of all Editors in the Queue. NOTE: This includes any Editors who were previously in the Queue, plus any new Editor(s) being added to the Queue in this user session. If a user is adding a new Editor to a pre-existing queue of 10 Editors, all 11 Editors will be displayed on this page in the order specified on the *Editor Selection Summary* page.

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For each Editor, the 'Letter' column contains a dropdown list containing all letters in the Invite/Assign/Unassign Editor Letter Family. If a new Queue is being created, or an Editor is being added to an existing Queue, the letter associated with the 'Editor Invited for Assignment' event displays. NOTE: If the Editor is already in the Queue and has previously had a different letter selected, that letter will be displayed.

Each Editor's letter is available for customization by clicking the <u>Customize</u> link.

		this submission. For Editors invited immediately, an invita- lections but you may customize the letters first. (more)		
	Cancel Confirm	n Selections and Submit Queue		
Editors In Queue				
Name	Letter			Remove from Queu
Anthony Author, MD (Associate Edito	Editor Invitation	×	Customize	
Annie The Dog, PhD (Associate Edito	Editor Invitation	×	Customize	
Emily Editor, MD (Associate Editor)	Editor Invitation	v	Customize	
	Cancel Confirm	n Selections and Submit Queue		

When edits are done, the user clicks the 'Confirm Selections' and Submit Queue' button. If this is the first time the Queue is being created for the submission, the system checks the 'Number of invitations to be sent immediately when queue is confirmed' (configured in PolicyManager) and sends out that number of invitations. The remaining Editors are added to the Queue, just like when the 'Submit Queue without Customizing Letters' button is clicked.

If the Queue already exists, and Editors are being added to it, no invitation letters are sent at this time, however any letter modifications are saved.

Once a Queue is created, users can return to the *Editor Selection Summary* page and edit the invitation letter for any Editors in the Queue. A new "Customize Letters" column displays in the Candidates Grid. An <u>Edit</u> link is displayed for each Editor previously selected for the queue who is in the candidate list and has not yet received the invitation letter. Clicking the <u>Edit</u> link takes the user to the *Customize Letter* page where he can make any additional edits as desired. If a letter has already been customized, an asterisk is displayed next to the <u>Edit</u> link.
Update	Invitation Ord	ler	Cancel	Customiz	e Letters & Subr	nit Queue	Submit Queue withou	t Customizing Le	etters Close	Queue
Select	Invitation Order	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations	Available during next 30 days	Customize Letters
V	1	Associate Editor	Annie The Dog, PhD		o	Q	11	2	Yes	<u>Edit</u> *
V	2	Associate Editor	Emily Editor, MD 🏹	University of Colorado	0	<u>0</u>	11	2	Yes	Edit
		Staff Editor	Jungle Book, oh		o	Q	1	2	Yes	_
		Editor-in-Chief (This editor is already assigned to the current submission)	Edward Editor, MD 🕅	Duke Medical School	0	<u>0</u>	49	1	Yes	
		Editor-in-Chief	Lyndon Holmes		0	<u>0</u>	1	1	Yes	
		Editor-in-Chief	Smartbot Smartbot 🏹		0	Q	1	1	Yes	
		Editor-in-Chief	Buttercup Swatski, CGC		0	Q	1	0	Yes	

Sample page; two Editors have letters saved, one of which has been customized:

TO CONFIGURE:

To enable the 'Suggest Editor' feature for your publication, contact your Aries account representative.

For publications already using the 'Suggest Editor' feature, no additional configuration is required to allow the customization of Editor Invitation Letters when creating or managing the Editor Queue.

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CROSS-PORTAL ENHANCEMENTS

Cross-Publication Duplicate Submission Checking

In EM v10.1, Publications may configure a 'Set Number of Days for Duplicate Submission Check' option, which allows an Editor to be warned, through a visual prompt (\square), if the Author has submitted a manuscript to the Publication in the past {x} number of days. This check is only made against the Author's name and only when New Submissions are received by the current Publication.

Also in EM v10.1, Business Publisher Groups may have a Cross-Publication reporting feature enabled (must be enabled by your Aries Customer Service Representative), allowing reports to be run across all sites within the Business Publisher Group. NOTE: The publication must first have a signed agreement with Aries to use Cross-Publication Enterprise Analytics Reporting.

New in EM v10.2, Publications that are part of a Business Publisher Group that has signed up for the CP-EAR feature may also choose to configure a more robust Duplicate Submission Checking feature (described in the Duplicate Submission Checking section of these Release Notes) for duplicate checking across all sites in the Business Publisher Group.

When this new feature is enabled, then upon receipt of a New or Revised submission (or an Edited submission) of a configured Article Type, the Article Title of the triggering submission is used as a search argument against the Article Title and Abstract of all submissions already submitted to all publications in the Business Publisher Group, and the Author list of the triggering submission is used as a search argument against the Article Title and the Author list of the triggering submission is used as a search argument against the Author lists of previously submitted manuscripts across all linked publications.

When enabled (in PolicyManager), the new Duplicate Submission Check query is run at the following Events:

- New Submission Sent to Publication
- New Child Submission Sent to Publication
- Revised Submission Sent to Publication
- Author Returns Submission to Publication
- Editor Approves Edited Submission

NOTE: The new Duplicate Submission Checking feature is only run when the above events are triggered going forward; new Duplicate Submission Check results will not display for existing submissions.

When the new Duplicate Submission Checking feature is run on a submission, three scores are returned for each similar submission, and an overall EM Duplicate Score is calculated. It is important to note that the EM Duplicate Score is a relative measure of the similarity between the triggering submission and the submissions returned as the results of the query. These scores are:

- Article Title Similarity 40% of the total score
- Author Similarity 30% of the total score

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• Abstract Similarity – 30% of the total score

A new <u>Duplicate Submission Check Results</u> Action Link displays for the submission in most Editor Folders (such as *New Submissions, New Submissions Requiring Assignment, Revised Submissions, Revised Submissions Requiring Assignment*). Next to this link, the highest "EM Duplicate Score" of all possible matches across all linked publications displays in parenthesis. If this Publication has configured a Duplicate Score Threshold in PolicyManager, and the highest identified Duplicate Score meets or exceeds the threshold, the EM Duplicate Score will display in red text to visually alert the Editor.

Sample New Submissions *folder*:

New Submissions - Mary François Sm	ith, 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 (9 total su	bmissions)			Display 500) 💙 r
■ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/ Category		Author Name	Init Sub ▲V
View Submission Duplicate Submission Check Results (39%) Details V Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production AuthorMapper WFIAE Author Mapper LASTNAME Send E-mail Linked Submissions		Perspective		Demonstration of Duplicates	Kermit the Frog O	Aug 4:21

Clicking the <u>Duplicate Submission Check Results</u> link opens the new *Duplicate Submission Check Results* page. This page displays up to 20 potential duplicate submissions across all linked publications, based on the comparisons between Article Title, Author List, and Abstract. These are listed in order from the highest "EM Duplicate Score" to the lowest (though only the highest EM Duplicate Score is displayed above the grid). For each submission in the results set, each of the three scores is displayed, with a visual bar graph representing the score. If the individual result score is over the configured threshold, the bar displays as red, otherwise it displays as green.

NOTE: Although the value is calculated and stored for each submission in the results set, only the highest score is displayed as the "EM Duplicate Score" next to the <u>Duplicate Submission</u> <u>Check Results</u> link, and on the *Duplicate Submission Check Results* page.

For each submission in the list, the logged in user will see the Publication Code of the publication in which the submission was found. If the submission was found in a linked Publication, a <u>Send E-mail</u> link displays below the Publication Code (described further below).

For submissions that are in the current publication, the logged in user may see a <u>View</u> <u>Submission</u> link or a <u>Details</u> link allowing them to access the submission to confirm if this is in fact a duplicate of the submission. If an Editor is blinded to a potential duplicate submission, the <u>View Submission</u> and <u>Details</u> links are suppressed.

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Potential Dupl	icate Submissions								
								EM Du	plicate Score: 100
Publication Code	Manuscript/Submission Number	Initial Date Submitted	Revision	Current Status	Article Title	Authors	Article Title Similarity	Author Similarity	Abstract Similarity
SALLYDEV100	SALLYDEV100-D-13-00005 View Submission Details	Jan 31 2013 4:42PM	1	Submitted to Journal	Applications of Graphene in Technology	Buzz Aldrin, PhD; John Nash, PhD; Charlie Chaplin, PhD	100%	100%	100%
SALLYDEV100	SALLYDEV100-D-11-00873 View Submission Details	Jan 30 2013 3:42PM	2	With Editor	Technology Constant for Visual Transparency of Graphene	Buzz Aldrin, PhD; John Nash, PhD; Charlie Chaplin, PhD	73%	100%	51%
SALLYDEV100	SALLYDEV100-D-12-00043 View Submission Details	Nov 14 2012 2:06PM	0	Under Review	Experimental Methods to Produce Graphene Nanoribbons	John Nash, PhD; Charlie Chaplin, PhD; Richard Feynman, PhD	61%	49%	58%
CAROLINEDEV100 Send E-mail	CAROLINEDEV100-S-10- 00345	Oct 29 2012 11:34AM	1	Completed	Graphene-based nanotechnology in energy applications	John Henry, PhD; Charlie Chaplin, PhD; Richard Feynman, PhD	57%	51%	49%
SALLYDEV100	SALLYDEV100-D-10-00230 View Submission Details	Aug 16 2012 4:23PM	0	Submitted to Journal	Graphene-based composite materials	Buzz Aldrin, PhD; John Smith, PhD; Charlie Chaplin, PhD	56%	48%	51%
SALLYDEV100	SALLYDEV100-D-10-00345 View Submission Details	Jun 30 2010 4:42PM	1	Completed	High-quality and uniform graphene films on copper foils	John Wayne, PhD; John Nash, PhD; Charlie Tuna, PhD	53%	51%	36%
SALLYDEV100	SALLYDEV100-D-12-00343 View Submission Details	Nov 14 2012 2:06PM	0	Under Review	Experimental Methods to Produce Graphene Nanoribbons	John Nash, PhD; Charlie Chaplin, PhD; Richard Feynman, PhD	53%	46%	29%
JANETDEV100 Send E-mail	JANETDEV100-D-10-00345	Jul 14 2011 11:58AM	1	Completed	Elevible Touch Screens	Buzz Aldrin, PhD; John Nash, PhD; Will Smith, PhD	45%	53%	53%
CAROLINEDEV100 Send E-mail	CAROLINEDEV100-D-10- 00230	Jan 31 2013 4:42PM	2	Under Review	Two-dimensional material graphene	Buzz Aldrin, PhD; Jonathan Fry, PhD	42%	51%	51%
JANETDEV100 Send E-mail	JANETDEV100-D-10-00345	Aug 23	1	Under Review	Graphene - A Material for all Seasons	Buzz Aldrin, PhD; John Nash, PhD; Mary Chaplin, PhD	39%	51%	26%
SALLYDEV100	SALLYDEV100-D-13-00015 View Submission Details	Call DO	1	Submitted to Journal	Two-dimensional materials in Technology	Buzz Aldrin, PhD; John Adams, PhD; Charlie Tuna, PhD	39%	33%	43%
JANETDEV100 Send E-mail	JANETDEV100-D-10-00345	Jan 30 2013 3:42PM	2	With Editor	Experimential Methods in Technology	Buzz Aldrin, PhD; Nick Fry, PhD; Mary Tyler Moore, PhD	33%	33%	51%
SALLYDEV100	SALLYDEV100-D-12-00023 View Submission Details	Nov 14 2012 2:06PM	0	Under Review	Experimental Methods in Nanoscience	James Madison, PhD; Charlie Sheen, PhD; Richard Feynman, PhD	33%	29%	48%
CAROLINEDEV100 Send E-mail	CAROLINEDEV100-D-10- 00345	Oct 29 2012 11:34AM	1	Completed	Industrial Applications of Materials	Buzz Aldrin, PhD; Mary Chaplin, PhD	27%	51%	49%
SALLYDEV100	SALLYDEV100-D-10-00230 View Submission Details	Aug 16 2012 4:23PM	0		A study of composite materials	John Nash, PhD; Mary Chaplin, PhD	27%	48%	51%
SALLYDEV100	SALLYDEV100-D-10-00345 View Submission Details	Jun 30 2010 4:42PM	1	Completed	Large-Area Synthesis of High-Quality Films on Copper Foils	Jane Austen, PhD; Margaret Mitchell, PhD; Charlie Tuna, PhD	19%	16%	36%
TONYDEV100 Send E-mail	TONYDEV100-D-10-00230	Jan 31 2013 4:42PM	0	Submitted to Journal	Trends in Toxicology	Dick Clark, PhD; Stephen Fry, PhD; Mary Adams, PhD	15%	16%	29%
IANETDEV100 Send E-mail	JANETDEV100-D-10-00345	Jul 14 2011 11:58AM	1	Completed	Applications in Neuroscience	Elizabeth Barrett, PhD; John Fry, PhD; Geraldine Chaplin, PhD	15%	16%	16%
CAROLINEDEV100 Send E-mail	CAROLINEDEV100-D-13- 00130	Jan 31 2013 4:42PM	2	Under Review	Applications of Computers in Education	Daniel Day Lewis, PhD; John Fry, PhD; Mary Madison, PhD	12%	16%	26%
JANETDEV100 Send E-mail	JANETDEV100-D-12-00245	Aug 23 2012 9:32AM	1	Under Review	Applications of Information Technology	Keith Moon, PhD; John Fry, PhD; Mary Chaplin, PhD	13%	15%	16%

Sample page; Publication is not configured in "blinded mode":

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If an Editor is blinded to a potential duplicate submission in the currently logged in publication, or if a submission is identified in a linked publication, and the current publication is searching across publications in "blinded mode", the word [REDACTED] is displayed in place of the Article Title and Authors of the similar submission.

Campalongoo	Duchligation	10	configurad		"hlindad maada".
Sample Dage.	гиписанон	LS	conngurea	ın	"blinded mode":
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d the Abstract of	a submission. The EM Dupli	ate Score is	the highest	weighted a	verage for any of the submi	l below. A separate similari ssions displayed below.			
Potential Dupl	icate Submissions								
		Initial							licate Score: 100%
ublication ode	Manuscript/Submission Number	Submitted	Revision	Current Status	Article Title	Authors	Article Title Similarity	Author Similarity	Abstract Similarity
ALLYDEV100	SALLYDEV100-D-13-00005 View Submission Details	Jan 31 2013 4:42PM	1	Submitted to Journal	Applications of Graphene in Technology	Buzz Aldrin, PhD; John Nash, PhD; Charlie Chaplin, PhD	100%	100%	100%
ALLYDEV100	SALLYDEV100-D-11-00873	Jan 30 2013 3:42PM	2	With Editor	Technology Constant for Visual Transparency of Graphene	Buzz Aldrin, PhD; John Nash, PhD; Charlie Chaplin, PhD	73%	100%	51%
ALLYDEV100	SALLYDEV100-D-12-00043 View Submission Details	Nov 14 2012 2:06PM	0	Under Review	Experimental Methods to Produce Graphene Nanoribbons	John Nash, PhD; Charlie Chaplin, PhD; Richard Feynman, PhD	61%	49%	58%
AROLINEDEV100 end E-mail	CAROLINEDEV100-S-10- 00345	Oct 29 2012 11:34AM	1	Completed	[REDACTED]	[REDACTED]	57%	51%	49%
ALLYDEV100	SALLYDEV100-D-10-00230	Aug 16 2012 4:23PM	0	Submitted to Journal	[REDACTED]	[REDACTED]	56%	48%	51%
ALLYDEV100	SALLYDEV100-D-10-00345 View Submission Details	Jun 30 2010 4:42PM	1	Completed	High-quality and uniform graphene films on copper foils	John Wayne, PhD; John Nash, PhD; Charlie Tuna, PhD	53%	51%	36%
ALLYDEV100	SALLYDEV100-D-12-00343 View Submission Details	Nov 14 2012 2:06PM	0	Under Review	Experimental Methods to Produce Graphene Nanoribbons	John Nash, PhD; Charlie Chaplin, PhD; Richard Feynman, PhD	53%	46%	29%
ANETDEV100 end E-mail	JANETDEV100-D-10-00345	Jul 14 2011 11:58AM	1	Completed	[REDACTED]	[REDACTED]	45%	53%	53%
AROLINEDEV100 end E-mail	CAROLINEDEV100-D-10- 00230	Jan 31 2013 4:42PM	2	Under Review	[REDACTED]	[REDACTED]	42%	51%	51%
NETDEV100 end E-mail	JANETDEV100-D-10-00345	Aug 23 2012 9:32AM	1	Under Review	[REDACTED]	[REDACTED]	39%	51%	26%
ALLYDEV100	SALLYDEV100-D-13-00015 View Submission Details	Feb 28 2013 4:42PM	1	Submitted to Journal	Two-dimensional material graphene	Buzz Aldrin, PhD; John Adams, PhD; Charlie Tuna, PhD	39%	33%	43%
NETDEV100 end E-mail	JANETDEV100-D-10-00345	Jan 30 2013 3:42PM	2	With Editor	[REDACTED]	[REDACTED]	33%	33%	51%
ALLYDEV100	SALLYDEV100-D-12-00023 View Submission Details	Nov 14 2012 2:06PM	0	Under Review	Experimental Methods in Nanoscience	James Madison, PhD; Charlie Sheen, PhD; Richard Feynman, PhD	33%	29%	48%
AROLINEDEV100 end E-mail	CAROLINEDEV100-D-10- 00345	Oct 29 2012 11:34AM	1	Completed	[REDACTED]	[REDACTED]	27%	51%	49%
ALLYDEV100	SALLYDEV100-D-10-00230 View Submission Details	Aug 16 2012 4:23PM	0	Submitted to Journal	A study of composite materials	Buzz Aldrin, PhD; John Fry, PhD; Mary Chaplin, PhD	27%	48%	51%
ALLYDEV100	SALLYDEV100-D-10-00345 View Submission Details	Jun 30 2010 4:42PM	1	Completed	Large-Area Synthesis of High-Quality Films on Copper Foils	Jane Austen, PhD; Margaret Mitchell, PhD; Charlie Tuna, PhD	19%	16%	36%
ONYDEV100 end E-mail	TONYDEV100-D-10-00230	Jan 31 2013 4:42PM	0	Submitted to Journal	[REDACTED]	[REDACTED]	15%	16%	29%
ANETDEV100 end E-mail	JANETDEV100-D-10-00345	Jul 14 2011 11:58AM	1	Completed	[REDACTED]	[REDACTED]	15%	16%	16%
	CAROLINEDEV100-D-13- 00130	Jan 31 2013 4:42PM	2	Under Review	[REDACTED]	[REDACTED]	12%	16%	26%
NETDEV100 end E-mail	JANETDEV100-D-12-00245	Aug 23 2012 9:32AM	1	Under Review	[REDACTED]	[REDACTED]	13%	15%	16%

Because users do not have access to 'View Submission' for those submission identified as similar in linked publications, a new <u>Send E-mail</u> link is available for each of these submissions. When the user clicks this link, he is brought to a *Customize Letter* page where:

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- The 'From' field is populated with the Editorial "E-mail From" Address for the logged in user's publication.
- The 'To' field is populated with the Editorial "E-mail From" Address for the publication associated with the submission for which the <u>Send E-mail</u> link was clicked.
- The 'Letter Subject' populates with "Potential Duplicate Submission:" followed by the Manuscript Number of the potential duplicate submission, if available. If the submission has not yet been assigned a Manuscript Number, the Submission Number is shown.
- The 'Letter Body' is empty, allowing the user to compose whatever letter he wishes to compose regarding the request for additional information.

		at 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
om:		"SALLYDEV100" <subnoske@ariessc.com></subnoske@ariessc.com>
:		"CAROLINEDEV100" <trash1@ariessc.com< td=""></trash1@ariessc.com<>
tter Subject:		Potential Duplicate Submission: CAROLINEDEV100-S-10-00345
		Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank box next to cc: or bcc, as appropriate. Multiple e-mail addresses or be included, separated by semicolons (;).
	cc:	
	bcc:	
ter Body:		Insert Special Character Open in New Window

Whether the Duplicate Submission Check is run for a single publication or across linked publications, the <u>Duplicate Submission Check Results</u> link may also be displayed on the following:

Technical Check page:



Default Details page:

	Details for Manuscript Number: Unassigned "Demonstration of Duplicates"					
	Cancel Save Save and Close					
Manuscript	Notes Production Notes Editors Reviewers Alternate Reviewers Additional Information					
Additional Manuscript Details:	Add/Edit Additional Manuscript Details					
Corresponding Author:	Kermit the Frog , V , CONGO, THE DEMOCRATIC REPUBLIC OF THE Proxy					
Corresponding Author E- Mail:	bhopkins@ariessc.com					
Author Comments:						
Other Authors:	Jennifer Convertable,					
Author Questionnaire Summary:	View Author Questionnaire Summary					
Short Title:						
Article Type:	Perspective					
Section/Category:						
Keywords:						
Classifications:	This manuscript does not have any Classifications.					
Requested Editor:						
Technical Check:	Technical Check Information					
Initial Date Submitted:	Aug 14 2013 04:21PM					
Cultorial Status Date.	Aug 14 2015 04:21PM					
Duplicate Submission Check:	Duplicate Submission Check Results (39%)					
Current Editorial Status:	Received by Journal					

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 OCommerce Manager

File Inventory page:

	Michae	l Green (BOS	File Inventory				es II:	" (<u>View Subn</u>	nission)
download be used to CrossChe open to th	a zip file co o select or u ck, select th ne CrossChe	ntaining multiple item nselect all the files. A le file(s) you wish to a ck login page (this w	rrent version of the latest R is, select the items using the idditional software (such as ' download and click the 'Cros indow remains open in the b n CrossCheck, you may retu	check boxes, and then o VinZip) must be installed sCheck' button. The sele ackground). Use your Cr	lick the 'Download Z on your computer in cted files will be dow ossCheck login crede	p File' button. T order to unzip nloaded to your entials to sign in	he 'Cheo (uncomp compute , then up	ck All' and 'Clo press) the zip er, and a new pload the sele	ear All file. To windo	'links may o initiate ow will
If a check file. (less		ot appear in the 'Sele	ct' column for a file, the file i	s no longer available. Cl	ck the Download link	in the Action co	olumn fo	r more inform	nation	about the
	ad Selections		CrossCheck	Duplicate Submission	<u>Check Results</u> (33%)			Close	ave a	nd Close
	mission Fi	les								
Check All Clear All	Action	Item	Description	Iter	r Family File Na	me	Size	Modified	QC	Display On TF
	<u>Download</u>	Cover Letter	Cover Letter	Defa	ult Demo C	over Letter.doc	25.5 KB	Apr 25 2012 4:24PM		
Upload	Companion	File								
Downloa	ad Selections	as Zip File						Close	ave a	nd Close

TO CONFIGURE:

Cross-Publication Duplicate Submission Checking is enabled by Aries' Customer Service group. To enable this feature, please contact your customer service representative. When requesting to have this feature turned on for your Business Publisher, you may request that only some publications have the Cross-Publication Duplicate Submission Checking feature turned on.

For publications for which you wish to enable this feature, you may also decide to have the feature enabled in "blinded mode" or "unblinded mode". When "blinded mode" is enabled, then the Article Title and Authors of any results from other publications will display as [Redacted].

Once this feature has been enabled for your set of publications, further configuration must be done for each Publication. To enable the new Duplicate Submission Checking feature in each Publication in the Business Publisher Group, first go to PolicyManager and click the newly named <u>Configure Duplicate Submission Check</u> link (formerly called <u>Set number of Days for Duplicate Submission Check</u>).

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The new page has two sections. The upper portion is where you can configure when the Duplicate Submission Checking feature should provide alerts.

Publications configured to use the existing "Duplicate Submission Check" feature will still have this feature enabled upon upgrade to v10.2. The upper checkbox "The same Corresponding Author has submitted a paper in the past $\{n\}$ days" will be selected/checked, and the previously configured number will be displayed in the $\{n\}$ box.

Below this option is a new "A similar paper has been previously submitted. Highlight the EM Duplicate Score when it is $\{n\}$ % or more" option. When this option is selected/checked, then if a manuscript (of a configured Article Type) with a similar title, list of authors, or abstract has been previously submitted, a 'Duplicate Submission Check Results' link will be displayed to users with permission. Clicking the link will display a list of similar submissions.

The lower portion of the page is where you may edit the instructions that will display to users on the *Duplicate Submission Check Results* page.

Configu	re Duplicate Submission Check
appear next to the Author's nam Assignments, Direct-to-Editor Ne Author's name to see informatio If a manuscript with a similar titl Submission Check Results' link v list of similar submissions. O You may highlight scores O An overall 'EM Duplicate S	w manuscript within the number of days set below, a I symbol will the in the Editor folders New Submissions, New Submissions Requiring the Submissions and New Assignments. The Editor can then click the n about prior submissions. If the click of the symbol submitted, a 'Duplicate will be displayed to users with permission. Clicking the link will display a that exceed a configured threshold. Score' will be calculated, based on a weighted average of the Article Title i (30%), and the Abstract (30%).
Alert me when: The same Corresponding Author has A similar paper has been previously :	submitted a paper in the past 30 days submitted. Highlight the EM Duplicate Score when it is 50 % or more
Page	Instructions
Duplicate Submission Check Results	Insert Special Character The results of a comparison between this submission and manuscripts submitted as of the date shown are listed below. A separate similarity score is shown for the Article Title, the list of Authors and the Abstract of a submission. The EM Duplicate Score is the highest weighted average for any of the submissions displayed below.
	View Default Instructions Revert to Default Instructions

Once that is configured, you must configure Article Types for which the new Duplicate Submission Checking function must be used. To do this, go to PolicyManager, <u>Edit Article Types</u>, and edit the existing Article Types you wish to configure (or add a new Article Type). On the *Edit Article Type* page, select/check the new 'Duplicate Submission Check' option (displayed above the Author Parameters section).

Edit Article	Туре			
		Cancel	Submit	
Article Type: Family:	Perspective Maximum Article Type Regular Editor	name is 75 characters. Use Only: □		
	/hen you Hide an Article uploads from arXiv.org s	Type, the Article Type will be deactivated (not available erver	for new or revised manuscripts).	
Similarity Che	eck:	Send Reviewer PDF on Initial Submission Send Reviewer PDF on First Revision Send Reviewer PDF on Final Disposition to Accept		You must also set up Automatic Transfer to a checking service on the Configure Similarity Check page. Editor and Publisher Roles can be configured to send files by Automatic Transfer from the File Inventory or Technical Check pages even if you do not enable the options on this page.
Duplicate Sub	omission Check: 🛛 🗌	Check for duplicate submissions to Editorial Manager	Subsequent	You must also enable the check for duplicate submissions on the Configure Duplicate Submission Check page.
Number of days Revise Submiss	Author has to	Revision 0	Revisions 0	Set this value to zero if you do not want to use Revision Due Dates.

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To allow Editors or Publisher Roles to view the new Duplicate Submission Check results, go to RoleManager, Editor Role or Publisher Role, and edit the role(s) you wish to give this new permission. In the 'General Searching and Viewing' area, select/check the new "View Duplicate Submission Check Results" option.

Partial Page; Editor Role Definition:

	Edit Role Definition
Role Name:*	Managing Editor
	Maximum Role name is 40 characters.
	rm. Note : in boxes with multiple rows displayed, you may select or deselect multiple terms the CTRL (PC) or CMD/Apple key (Mac) when clicking.
	Expand All Collapse All
New Submissions	
Editor Assignment	
Reviewer Invitations	
Editor Decisions	
Proposals/Commentaries	
General Searching and Vie	
Use Editorial Details Layo	
Search All Manuscrip	•
Search Only Assigne	
Share Saved Searche	
View Linked Submiss	sion Groups
Create/Edit Linke	ed Submission Groups
Set Active	e/Inactive Status on Linked Submission Groups
View COS Scholar U	Iniverse Author Profiles
Search Similar Article	es in MEDLINE
Search Author Public	cations in MEDLINE
Initiate Similarity Che	eck
View Similarity Check	k Results
View Duplicate Subm	nission Check Results
Dibilographic Search	
AuthorMapper (v	with first initial at end)
Author Mapper ((LASTNAME)
✓ View Editorial Status	3 History

Editorial Manager ProduXion Manager Commerce Manager"

Partial Page; Publisher Role Definition:

Edit Role Definition
Role Name:* Production Team
Check the functions that this role is permitted to perform.
Expand All Collapse All
⊞ System Conversion Tasks
□ General Searching and Viewing
✓ View Submission
✓ View Manuscript Details
Use Editorial Details Layout Default Editorial
View Production Notes
Edit Production Notes
☑ View Manuscript Notes on Manuscript Details
Edit Manuscript Notes on Manuscript Details
☑ View Editorial Correspondence History
✓ View Additional Manuscript Details
Edit Additional Manuscript Details
☑ Download Source Files
Download Companion Files
☑ Upload, Hide and Restore Companion files
Initiate Similarity Check
View Similarity Silecti Results
View Duplicate Submission Check Results
✓ View Linked Submission Groups

A new "Duplicate Submission Check" option is added to the default *Editorial Details* layout on upgrade to v10.2. To add this new option to custom *Details* layouts, go to PolicyManager, and click the <u>Define Details Page Layouts</u> link in the 'General Policies' section. Click the <u>Edit</u> link for the custom layout to which you wish to add the new option, and then click the <u>Select Items to</u> <u>Display</u> link. Select/check the box next to the new 'Duplicate Submission Check' option in the "Links" section.

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	Select Items to Display for EVERYTHING										
Select the information to appear on the Details page * Items marked with an asterisk are subject to additional permissions, which may mean that some users will not be able to view them until you give them the additional permission to do so in RoleManager.											
	Expand All Collapse All										
🗆 Lir	ıks										
	✓ Blinded Editors *										
	Technical Check *										
	Additional Manuscript Details *										
_	Similarity Check *										
	☑ Duplicate Submission Check *										
L	Select Submissione Flags *										
	✓ File Inventory *										
	Publish Information										
	✓ Transmittal Form *										



Cross-Publication Reviewer Statistics

In EM v10.1, Publications may be configured to Share People among linked publications (using the Inter-Journal Resource Sharing, or IJRS, tool). Publications in a People Sharing Group may also choose to Share Reviewers, whereby one publication may search a Shared Publication's database of Reviewers.

Also in EM v10.1, Business Publisher Groups may have a Cross-Publication Enterprise Analytics Reporting (EAR) feature enabled (must be enabled by your Aries Customer Service Representative), allowing reports to be run across all sites within the Business Publisher Group. NOTE: The publication must first have a signed agreement with Aries to use Cross-Publication Enterprise Analytics Reporting.

New in EM v10.2, Publications that are part of a Business Publisher Group that has signed up for the CP-EAR feature and that are configured to "Share Reviewers" with a linked publication may now see 'Cross-Portal' Statistics for Reviewers when inviting Reviewers.

When an Editor clicks the <u>Invite Reviewers</u> link in an Editor folder and then selects any search option in the 'Search for Reviewers' drop-down menu, then when the Reviewer Candidates Grid displays, the following new rows display in the "Reviewer Statistics" column:

- A "Portal-wide" row displays below the existing "Last Review Agreed" row. The Portalwide date is the date this Reviewer last agreed to an assignment across *all* linked publications, followed by the Publication Code from which the date is shown.
- A "Portal-wide" row displays below the existing "Last Review Completed" row. The Portal-wide date is the date this Reviewer last completed an assignment across *all* linked publications, followed by the Publication Code from which the date is shown.
- A "Portal-wide" row displays below the existing "Last Review Declined" row. The Portal-wide date is the date this Reviewer last declined an assignment across *all* linked publications, followed by the Publication Code from which the date is shown.

Reviewer Statistics (Agreed Invitations)	
Reviews in Progress:	1
Completed Reviews:	0
Un-assigned After Agreeing:	0
Terminated After Agreeing:	0
Last Review Agreed:	Nov 11, 2012
Portal-wide: (DEMO5)	Dec 13, 2012
Last Review Completed:	Nov 30, 2012
Portal-wide: (DEMO3)	Jan 3, 2013
Last Review Declined:	Jan 5, 2013
Portal-wide: (DEMO1)	Jan 7, 2013
Avg Days Outstanding:	0
Manuscript Rating:	0
Avg Review Rating:	0.0

Sample Reviewer Statistics column display:

The "Invitation Statistics" column now includes two new rows:

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- The "Date Last Invited" row displays the date of the most recent invitation for this Reviewer on the 'current' publication (the one the Editor is logged into).
 NOTE: Upon upgrade, this row displays for all publications, not just those that are using People-Sharing or Cross-Publication Reporting.
- Below this, a "Portal-wide" row displays. The Portal-wide date is the date this Reviewer was last invited across *all* linked publications, followed by the Publication Code from which the date is shown.

NOTE: These rows are only populated with data for invitations sent after the upgrade; invitation dates prior to upgrade to 10.2 will not display.

Invitation Statistics Date Last Invited: Jan 21, 2013 Portal-wide: (DEMO2) Feb 1, 2013 **Outstanding Invitations:** 2 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0 Date Last Invited: Jan 21, 2013 Portal-wide: (DEMO2) Feb 1, 2013 Outstanding Invitations: 0 Agreed: 6 Declined: 0 Un-invited Before Agreeing: 2 Terminated: 0 Total Invitations: 10

Sample Invitation Statistics column display:

TO CONFIGURE:

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

To enable People Sharing between publications, go to AdminManager, and click the <u>Share</u> <u>People</u> link. Click the <u>Define People Sharing Group</u> link and enter the Publication Code of other publications in the "Add journal" field. Once this sharing is confirmed (the shared publications have all listed the other publications), click the <u>Define Reviewer Sharing Partners</u> link. Select the publication(s) with which you wish to share Reviewers.

When the above configurations are complete, the 'Portal-wide' statistics will display in the Reviewer Candidates grid.

Cross-Publication Author Statistics

In EM v10.1, Publications may be configured to Share People among linked publications (using the Inter-Journal Resource Sharing, or IJRS, tool). Also, Business Publisher Groups may have a Cross-Publication Enterprise Analytics Reporting (EAR) feature enabled (must be enabled by your Aries Customer Service Representative), allowing reports to be run across all sites within the Business Publisher Group. NOTE: The publication must first have a signed agreement with Aries to use Cross-Publication Enterprise Analytics Reporting.

New in EM v10.2, Publications which are part of a People Sharing group and which are in a Business Publisher Group that has signed up for the CP-EAR feature may now see 'Cross-Portal' Statistics for Authors when inviting Authors for Proposals or Commentaries.

When an Editor chooses to invite an Author to either provide a Commentary (via <u>Solicit</u> <u>Commentary</u>) or submit an invited submission for a Proposal (via <u>Invite Authors</u>), then upon searching for Authors or Alternate Authors (either by search or by classifications), when the Author Candidates Grid displays, the following new rows display in the "Author Statistics" column:

- A "Portal-wide" row displays below the "Last Invited Submission Agreed" row. The Portal-wide date is the date this Author last agreed to submit a paper across *all* linked publications, followed by the Publication Code from which the date is shown.
- A "Portal-wide" row displays below the "Last Invited Submission Received" row. The Portal-wide date is the date this Author last submitted an invited submission across *all* linked publications, followed by the Publication Code from which the date is shown.
- A "Portal-wide" row displays below the "Last Invited Submission Declined" row. The Portal-wide date is the date this Author last declined an invitation to submit a paper across *all* linked publications, followed by the Publication Code from which the date is shown.

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Sample Author Statistics column display:

Author Statistics		
Agreed and Awaiting Submission: Invited Submissions Received: Un-invited Before Agreeing: Un-invited After Agreeing: Last Invited Submission Agreed: Portal-wide: (DEMOS) Last Invited Submission Received: Portal-wide: (DEMOS) Last Invited Submission Declined: Portal-wide: (DEMOS) Avg Days to Submit:	0 4 1 1 May 23, 2012 Jun 15, 2012 Jun 5, 2012 Aug 12, 2012 Mar 15, 2012 Mar 15, 2012 14	
Agreed and Awaiting Submission:	1	
Invited Submissions Received:	7	
Un-invited Before Agreeing:	2	
Un-invited After Agreeing:	0	
Last Invited Submission Agreed:	Jan 23, 2012	
Portal-wide: (DEMO5)	Feb 15, 2012	
Last Invited Submission Received:	Mar 5, 2012	
Portal-wide: (DEMO5)	Apr 12, 2012	
Last Invited Submission Declined:	Mar 15, 2012	
Portal-wide: (DEMO1)	Mar 15, 2012	
Avg Days to Submit:	21	

The "Invitation Statistics" column now includes two new rows:

- The "Date Last Invited" row displays the date of the most recent invitation for this Author on the 'current' publication (the one the Editor is logged into).
 NOTE: Upon upgrade, this row displays for all publications, not just those that are using People-Sharing or Cross-Publication Reporting.
 NOTE: This row is only populated with data after the upgrade; invitation dates prior to upgrade to 10.2 will not display.
- Below this, a "Portal-wide" row displays. The Portal-wide date is the date this Author was last invited across *all* linked publications, followed by the Publication Code from which the date is shown.

Sample Invitation Statistics column display:

Invitation Statistics	
Date Last Invited: Portal-wide: (DEMO5) Outstanding Invitations: Agreed: Declined: Un-invited: Total Invitations:	Jun 21, 2012 Sep 12, 2012 2 1 3 3 5
Date Last Invited: Portal-wide: (DEMO5) Outstanding Invitations: Agreed: Declined: Un-invited: Total Invitations:	Jun 21, 2012 Sep 12, 2012 0 1 3

TO CONFIGURE:

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

To enable People Sharing between publications, go to AdminManager, and click the <u>Share</u> <u>People</u> link. Click the <u>Define People Sharing Group</u> link and enter the Publication Code of other publications in the "Add journal" field. Once this sharing is confirmed, the 'Portal-wide' statistics will display in the Author Candidates Grid.

PRODUCTION TRACKING ENHANCEMENTS

Quick Links to Production Status Grid

In EM/PM v10.1, Editors may have a "Go to" drop-down menu displayed in the Main Menu area, allowing them to navigate to the Search Pages (Submissions, Submissions (Production), Proposals, People) or between Publications (if configured).

New in EM/PM v10.2, Editors with "View Production Status Grid" permission enabled will now have a new Quick Link called "Production Status Grid". This Quick Link behaves like the existing <u>Production Status Grid</u> link wherever it is displayed, bringing the user to the version of the PSG the user most recently used (traditional or interactive).

Partial Page display:

Editorial Manag	gerĭ			itorial ager™	_
HOME • LOG OUT • HELP • REGISTER MAIN MENU • CONTACT US • SUBMITA / Important Message: Site un	MANUSCRIPT • INSTRUCT	IONS FOR AUTHORS	Go to: Role: anuscript	Search Page Search Page Submissions Submissions (Production) Proposals	a: mary
Editorial Proposal Menu	Production Tasks	L	-[People Quidk Access Production Status Grid System Administrator Functions	
Managing Editor Production Tasks Menu	Search To-Do List	Search Submissions Searc	<u>h People</u>		
Quick Searches: <u>Article Title with eve</u> December Supplement		Submission Tasks Assigned Schedule Group Tasks Assig 'At-Risk' Submissions (16)		(2)	
December Supplement	Overview	Production Initiated – No Ta	sks Assigned	<u>d</u> (16)	

The new Quick Link displays in a section entitled 'Quick Access', and displays below the 'Search Page' section and above the 'Publication' list (for Editors configured with the Cross-Publication Login feature). For example:

-- Search Page --Submissions Submissions (Production) Proposals People -- Quick Access --Production Status Grid System Administrator Functions -- Publication --JXYZ JPRS

NOTE: Users will see only the appropriate items based on their permissions.

TO CONFIGURE:

No configuration is required to use this feature. The drop-down menu will appear if the user is configured with one or more 'Go To' Publications, is logged in under an Editor Role with one or more 'Search...' permissions, has the 'System Administration Functions' permission enabled, or has the 'View Production Status Grid' permission enabled.

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Assign Submission Production Tasks in Batches

Publications using Production Tracking often assign the same Submission Production Task to the same user, resulting in the user receiving multiple task assignment notifications. Publications may wish to assign the same task for multiple submissions with one letter notifying the user of more than one assignment.

New in PM v10.2, Publications may configure Submission Production Tasks so multiple assignments of the same type of task can be made for one task recipient, with only one letter being sent notifying that recipient of the multiple task assignments. The Task Recipient (with an Editor or Publisher role) will then be able to complete each assignment individually as time permits.

When a task is configured for Batch Assignment, then users with permission to assign Submission Production Tasks may initiate a batch assignment in one of two ways.

From the *Manage Schedule Groups* folder, when at least one Submission Production Task is configured to be Batch Assigned, then a new <u>Batch Assign Submission Task</u> Action Link is available.

Manage Schedule Groups						
	Page: 1 of 1	(6 total Schedule	Groups)			
■ Action ▲	Schedule Group ▲♥	Target Number of Submissions	Current Number of Submissions	Page Budget	Current Page Total	Target Publication Date ▲▼
Assign Production Task Batch Assign Submission Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group	Summer Issue	8	4	200	0	Jul 27 2007 12:00AM
Assign Production Task Batch Assign Submission Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group	Society Issue	8	12	200	12	Apr 30 2007 12:00AM

Partial page display; Manage Schedule Groups folder:

Users with permission to search submissions in production (using the <u>Search Submissions</u> link on the *Production Tasks Menu*) that are also able to assign at least one Submission Production Task with the new Batch Assign feature enabled will see a new 'Select' column when results are returned.

					Search	Subr	nissions	- Search Resu	ults					
					Production	n Statu	s Term is equ	al to 'Ready for Copyed	dit'					
				1	Save Search	Sea	rch Again	Batch Assign Product	tion Task					
						5	Switch to Edito	orial View						
		Page: 1 of	1 (17 total subm	issions)						Disp	lay 50 🗸 results per	page.		
	<u>Clear All</u>	Manuscript Number	Name	Article Title	Article Type	Short Title	1		Status	Group	Initial Date Submitted	Date Production Initiated	Date	Section/Categor
الما الما الما الما إلى الما إلى الم	Action A wr.Submission tails V Submission duction Datails V store solution: Status Grid solution: If Submission if Commentary assifications move Submission sion Production Task annes Schedule Group d Production thorMapper Weilde real real real real	▲▼	Simple Simon (BOSNIA AND HERZEGOVINA)	title	Original Study	••	Keywords	Classifications	Ready for Copyedit; [Not Copyedited]	Spring 2012	Mar 24 2009 12:00AM	Mar 24 2009 10:17AM	AY	AV
	sw submission tails V liate Discussion internet for the second story oduction Status Grid i Inventory II: Submission i Commentary sesifications move Submission sion Production Task store Schule Group store Status thorthapper WFIAE thorthapper WFIAE thorthapper WFIAE thorthapper LASTNAME the Status		Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE) ∇	Demonstration of a new feature	Betsy Article				Ready for Copyedit; [Not Copyedited]	Spring 2014: Germani 2014: French Spring Issue	Feb 8 2011 12:00AM	Feb 8 2011 1:44PM	Mar 4 2014 12:00AM	

When one or more boxes are checked/set in the 'Select' column, a new "Batch Assign Production Task" button is available.

	Search Submissions - Search Results													
					Production	n Status	s Term is equa	al to 'Ready for Copyedi	ť					
	Save Search Again Batch Assign Production Task													
	Suite Log attonal View													
		Page: 1 of	1 (17 total out	sions)						Disp	lay 50 💌 results per	page.		
	All Clear All	Manuscript Number	Author Name	Article Title	Article Type	Short Title		Classifications	Production Status		Initial Date Submitted	Date Production Initiated	Submission Target Online Date	Section/Category
Select	Action A wex Submission tails © tiliste Discussion aduction Details © story story aduction Details © day aduction Details © day day		Simple Simon (BOSNIA AND HERZEGOVINA)	title	Original Study		<u>Keywords</u>	Classifications	Ready for Copyedit; [Not Copyedited]	Spring 2012	Mar 24 2009 12:00AM			
V	ew Submission tails V likte Discussion oduction Details V story oduction Status Grid L Inventory fit Submission Dick Commentary assifications sion Production Task anone Schedule Group d Production thorthapper WFIAE thor Mapper LASTNAHE ender E-mail med Submissions		Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE) ∇		Betsy Article				Ready for Copyedit; [Not Copyedited]	Spring 2014: Spring 2014: French Spring Issue	Feb 8 2011 12:00AM	Feb 8 2011 1:44PM	Mar 4 2014 12:00AM	

After the user has either clicked on a <u>Batch Assign Submission Task</u> link in the *Manage Schedule Groups* folder, or has selected one or more submissions and clicked on a 'Batch Assign

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Production Task' button on the *Search Submissions Results* page, he is brought to a new *Batch Assign Production Task* page. From this page, the user may select from a list of available Production Tasks for which 'Batch Assignment' is available. If only one Task is configured in this way, it displays as text. Below this is a drop-down list containing all possible recipients of the selected task. The user must select a Task Recipient from the drop-down before proceeding to assign the tasks. If only one recipient is configured, that person's name displays as text.

1	Sampl	e page;	one task configured:	
				_

			Select the production task you the task will appear. The table of under your choices.		s selected, a list	t of people who can b						
	Production Task: Checking Something Task Assigned to: Please Choose a Person											
	Manuscript	ted for Assignment		Article Title	Article Type	Saction /Catagory	Production Status	Do Not Assign				
History	Number		O, THE DEMOCRATIC REPUBLIC	Demonstration of a new feature	Betsy Article	Section/ Category	In Production: Ready for Copyedit; [Not Copyedited]					
History		Simple Simon (BOSNIA	AND HERZEGOVINA)	title	Original Study		In Production: Ready for Copyedit; [Not Copyedited]					
HISTOLA		Simple Simon (BOSNIA	AND HERZEGOVINA)	luce								

When a Task and an Assignee have been selected, the page refreshes, and may display in a number of ways, depending on:

- Selected Assignee's Unavailable Dates: If the selected Assignee has Unavailable Dates scheduled within the configured "Check Unavailable Dates" window, the assignee's unavailable dates will show, similar to the existing display on the *Assign Submission Task* page. If alternates have been supplied by the Assignee, these are displayed and can be selected if desired.
- Selected Assignee's National Holidays: If the Selected Assignee has configured National Holidays these will display in a format similar to the existing display on the *Assign Submission Task* page.
- Selected Assignee's open Task Assignments: If this task type is already assigned to this task recipient for one of the selected submissions, the text 'Assigned to this Person' displays in the 'Do Not Assign' column.
- Submission Task Assignment History:
 - If there is a currently open task assignment to any person other than the person selected, informational text '(In Progress)' displays in the 'Do Not Assign' column
 - if there is a previously completed Submission Task of the selected type for the submission, informational text '(Previously Completed)' displays in the 'Do Not Assign' column
- Submission Configurations:

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- If the selected task is not in the configured Task Workflow for the Article Type, this Task may not be assigned, and the text 'Not in Workflow' will display in the 'Do Not Assign' column.
- If the selected task is configured such that an Assignment File must be selected for the task to be assigned and the submission does NOT have any files eligible for selection, the text 'No Files Available' will display in the 'Do Not Assign' column.

Sample page; potential messages displayed:

			the ta under 	: the production task you wish to assign. After the task is selected, a list of sk will appear. The table of selected submissions will confirm which submiss your choices. Production Task: Copy-Editing Task Assigned to: Stan D'Ardman				
Submis	ssions Selecte	d for	Assignment					
Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Section/Category	Production Status	Do Not Assign
<u>History</u>	JXYZ-D- 04-00032R1		Anne Author (UNITED KINGDOM)	Third test of spontaneous submission	Rapid Communication	Main Section	New In Production	
<u>History</u>	JXYZ-D- 10-00433		John MacJohn (UNITED KINGDOM)	Monte Carlo Simulation of Aggregate Slippage in Pneumatic Flows	Regular Submission	Main Section	New In Production	(Previously Completed)
<u>History</u>	JXYZ-D- 12-00001		John MacJohn (UNITED KINGDOM)	Hydrodynamics of turgid flow in pyroclastic rocks	Regular Submission	Main Section	New In Production	(In Progress)
<u>History</u>	JXYZ-D- 12-00001		Todd bishop (UNITED STATES)	Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo conseguat.	Rapid Communication	Reports Section	New In Production	✓ Assigned to this Person
<u>History</u>	JXYZ-D- 04-00033		Anne Author (UNITED KINGDOM)	Third test of spontaneous submission, Part II	Rapid Communication	Reports Section	New In Production	
<u>History</u>	JXYZ-D- 09-00292		Ron Beasley (UNITED KINGDOM)	Discrepancies across falling pressure profiles across laminar flow boundaries.	Regular Submission	Main Section	New In Production	✓ No Files Available

When the user clicks the 'Proceed with Selected Task' button, he is brought to a new *Batch Assign Production Task* page. This page is similar to the existing *Assign Production Task* page, with some differences to accommodate batch assignments.

A 'Due Dates' table displays under the 'Task Assigned To' field, listing each submission that has been selected for this batch task assignment. This allows this task to have a different due date for each selected submission in the batch.

Partial page display – top of Batch Assign *page:*

Batch Assign Production Task										
Back Cancel Assign Tasks and Send Letter										
Production Task:	Checking Something									
Task Assigned To:	Mick a Jagger/Production Team									
Due Dates:	Submission	Article Type	Target Number of Pages	Black and White Image Count	Color Image Count	Due Date (mm/dd/yyyy)				
	Kermit the Frog(CONGO, THE DEMOCRATIC REPUBLIC OF THE) Demonstration of a new feature	Betsy Article				09/06/2013				
	Simple Simon(BOSNIA AND HERZEGOVINA)title	Original Study				09/06/2013				
Batch Assignment Letter:										
From:	"Mary Smith" <bhopkins@ariessc.com></bhopkins@ariessc.com>									
To:	Mick a Jagger									
Letter Purpose:	Compositor Assignment									
Letter Subject:	Files ready for composite									
	Additional recipients can be copied or blind copied by typing their e-ma addresses can be included, separated by semicolons (;).	iil addresses into tl	ne blank box	es next to c	c: or bcc: b	elow. Multiple e-mail				
	cc:									
b										
Letter Body:	Insert Special Character Preview Letter Open in New Window									

NOTE: If the publication has enabled the new 'Include Submission in Multiple Schedule Groups' feature, and the submission for which the task is being assigned is in more than one Schedule Group, the batch assignment process will calculate due dates and "must start by" dates based on the Controlling Schedule Group when applicable.

The Batch Assignment Letter displayed is the letter configured on the *Configure Submission Production Task* page in PolicyManager (see the 'To Configure' section below). The text of this letter may be edited. A new %BATCH_ASSIGNMENT_SUBMISSION_LIST% merge field is available for inclusion in this letter. See below for more detail on this merge field. NOTE: This field does not merge into the body of the letter for editing.

The bottom of the *Batch Assign* page displays a grid with all Assignment Files for all Submissions. This grid displays any Submission and Companion Files for each Submission, as well as the Author/Editor PDF (when available). Each submission's file list can be expanded or collapsed, allowing the grid to be manageable for the assigning user.

Submission	Category	Item	Description	Item Family	File Name	Size	Last Modified	Uploaded By	QC Results	Allow Down
, Kermit the F	rog(CONGO, TH	E DEMOCRA	ATIC REPUBLI	C OF THE)Dem	onstration of a new feature					8
	Submission File	Video	Video	Figure	http://www.yarn.com	0 Bytes	Apr 02 2013 04:29PM		N/A	
	Submission File	Manuscript	Manuscript	Document	demo manuscript.doc	25.5 KE	Apr 02 2013 04:30PM		N/A	
, Simple Simo	n(BOSNIA AND	HERZEGOV	INA)title							=
	Submission File	Manuscript	Manuscript	Document	Typical Lifecycle of a Functional Specification.doc	28.5 KE	May 22 2009 09:39AM		N/A	 Image: A start of the start of
									Expand All	Collaps

Sample page: Assignment File Grid:

Editorial Manager ProduXion Manager Commerce Manager	Editorial Manager	ProduXion Manager*	Commerce Manage
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When the user completes their edits of the Assignment letter and clicks the 'Assign Tasks and Send Letter' button, one Assignment Letter is sent to the recipient, but assigning the task will create individual task assignment records, as if the user had gone through each submission in the selected set in turn to assign the same type of task individually. The user is brought to a confirmation page displaying the Assignee, the Submission Production Task, and a list of the submissions assigned.

Sample Confirmation page:



The Task recipient receives one letter for all assignments. If the new

%BATCH_ASSIGNMENT_SUBMISSION_LIST% merge field is included in the letter, this merge field will list out the selected submissions as follows:

- i) A 'Submission:' label, followed by the Submission Identifiers configured under '*PolicyManager>Configure Identifiers Displayed in Production Tracking*', separated by commas
- ii) A semi-colon, space and a 'Due:' label, followed by the assignment due date, in the Publication Defined Date Format.
 - (1) NOTE: when previewed, the Due Dates cannot be displayed; in this case, each Due Date is replaced by the placeholder text "[Due Date]".

Sample format:

Submission: Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE), Demonstration of a new feature; Due: Sep 06 2013 11:59PM

Submission: Simple Simon, title; Due: Sep 06 2013 11:59PM

TO CONFIGURE:

To configure a Submission Production Task so that assignments of this task type can be made for more than one submission at a time, go to PolicyManager, <u>Configure Submission Production</u> <u>Tasks</u>, and either Edit an existing Task or Add a new task. On the *Add/Edit Submission Production Task* page, select/check the new 'Allow Batch Assignment' option, displayed below the existing 'Assign Automatically when previous Task is completed' option.

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Edit Su	ubmission Production Task
	Cancel Submit
New Production Task Name	Insert Special Character Checking Something Maximum Production Task Name is 100 characters
will be deactivate	a Production Task Name, the Production Task Name ed (not available for assignment).
Assignment Options	
this process occurs automatically you mus	he Production Task immediately preceding this one is submitted. Because at select a specific user to be identified as the assignor and a specific user pure one or more File types to be automatically selected, unless this task is
Assign Auto	omatically when previous Task is completed
Production view, or all Submissions in a Submissions that are specifically configured to all	ner a set of submissions selected from the Search Submissions Results chedule Group selected from the Manage Schedule Groups folder. Only low batch assignment can be used in these cases. Tasks that are ing Author Only' cannot also be configured to Allow Batch Assignment.
☑ Allow Batch	n Assignment
Typing text into the Custom Instructions v assignments. Leave this field empty to su	vill display an "Instructions" link when the recipient views their task ppress this link.
Production Task Custom Insert Special Instructions:	Character
	~

In the 'Letter Options' section of the page (at the bottom), select the assignment letter to be sent for the 'Batch Assignment Letter' option. NOTE: The existing 'Assignment Letter' option is renamed 'Non-Batch Assignment Letter''.

Partial page displayed:

Letter Options		
letters may be cus Types configured v Assignment; when	ble for this feature are those assigned to the tomized prior to being sent. Batch Assignr with 'Allow Batch Assignment', and only wi such a task is assigned as a single task, in tch Assignment Letter is used.	ment Letters are only used by Task hen the task is selected for Batch
	Allow Task Assignment without S	Sending Letter
	Non-Batch Assignment Letter:	Please Choose a Letter
	Batch Assignment Letter:	Compositor Assignment
	Cancel Assignment Letter	Please Choose a Letter
•		

NOTE: The Submission Production Task must be configured to be assigned to Editor/Publisher Roles; Authors may not have batch assignments configured.

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To include the new %BATCH_ASSIGNMENT_SUBMISSION_LIST% merge field in the Batch Assignment Letter, go to PolicyManager, <u>Edit Letters</u>, and Edit an existing letter, or add a new letter. Add the new merge field as desired.

Editorial Manager
 ProduXion Manager
 O
 Commerce Manager

Include Submission in Multiple Schedule Groups

Some Publications publish in multiple languages, such as English and German. On occasion, a single submission is included in both editions, though the paper may be translated. In PM v10.1, a submission can only belong to one Schedule Group at a time, providing challenges for publishing in two editions of the publication.

New in PM v10.2, submissions may now be assigned to more than one Schedule Group. When a submission belongs to more than one Schedule Group, the submission itself is not duplicated, but has a separate Table of Contents (TOC) entry for each group. When a submission is part of more than one Schedule Group, one Group is designated as the "controlling" Schedule Group. This Schedule Group is the one from which any due dates related to Submission Production Tasks are calculated, such as 'Must Start By' dates, etc.

The Schedule Group associated with a submission displays in many folders and on the *Details* page (if configured). In new functionality, when a submission is associated with more than one (1) Schedule Group, all open Groups display, with the "controlling" group marked with a key icon. Groups are listed with the Controlling Schedule Group displayed first, followed by the remaining Groups in ascending alphabetical order, by description.

View All Submissions in	Production									
Contents: This page lists a if they are associated with a	ll submissions whe Schedule Group v	ere at least one production when that group is closed.	task has been assigned, or the sub	mission has been assigned to a Sch	edule Group. Subm	iissions w	ill move out of th	is folder when th	he End Production	action is used, or
	Pa	age: 1 of 1 (37 total submi	ssions)			Displ	ay 50 🗸 results	per page.		
E Action 🔺	Manuscript Number ▲▼	Author Name	Article Title	Production Status ▲▼	Schedule Group		Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
Assian Production Task Change Schedule Group End Production Status Grid Production Details T History Transmittal Form File Inventory Edit Submission AuthorMapper LASTNAME Send E-mail Unked Submissions	DEMO391	Kevin M. Carlson (UNITED STATES)	Breast cancer research	Production Initiated	Spring Issue Spring 2014: German		Original Study	Sep 26 2002 9:43AM	Apr 3 2007 12:26PM	Apr 23 2007 12:00AM
Assign Production Task Change Schedule Group Production Status Grid Production Datails Wistory Transmittal Form File Inventory Edit Submission Author Mapper LASTNAME Send E-mail Unked Submissions	DEMO-D-03- 00087R1	Kevin M. Carlson (UNITED STATES)	Exercise-Induced Asthma	Copyedit Underway; Artwork Correction Underway; [Not Copyedited]	<u>Spring Issue</u>		Original Study	Oct 20 2003 6:23PM	Apr 3 2007 4:29PM	Apr 23 2007 12:00AM

To use this feature, at least one Editor or Publisher role must have the new "Assign Submissions to Multiple Schedule Groups" permission enabled. A user with this role can add a submission to multiple schedule groups using the <u>Assign to Schedule Group</u> Action Link or the <u>Change</u> <u>Schedule Group</u> Action Link.

From folders where the <u>Assign to Schedule Group</u> Action Link is available (such as *View All Submission in Production* where a submission is not currently in a Schedule Group), clicking that link opens an enhanced *Assign Submission to a Schedule Group* page. From this page, the user may choose all desired Schedule Groups by clicking the 'Add' check box for each one.

button to confirm the assignment	h new Schedule Group that you wish ts and select a desired 'Controlling' S	chedule Group if necessary.	
	Target Online Publication Date spec ch are configured to recognize this d		used to
	Cancel Proceed		
Current Schedule Group Assi	gnment: None		
Submission Target Online Pu	blication Date:	(mm/dd/yyyy)	
Schedule Group Description	SG Target Online Publication D	ate SG Target Publication D	te Ad
Fall Issue	Aug 31 2007 12:00AM	Sep 07 2007 12:00AM	
Spring 2012	May 06 2013 12:00AM	May 02 2012 12:00AM	
Spring 2014: German	Mar 04 2014 12:00AM	Mar 31 2014 12:00AM	
Spring Issue	Apr 23 2007 12:00AM	Apr 30 2007 12:00AM	
	Jul 20 2007 12:00AM	Jul 27 2007 12:00AM	

From folders where the <u>Change Schedule Group</u> Action Link is available (such as *View All Submissions in Production*), clicking that link now opens an enhanced *Assign Submission to a Schedule Group* page. From this new page, the user may change the schedule group by clicking the 'Remove' checkbox next to the "Current Schedule Group Assignment", or he may click the 'Add' checkbox for one or more other Schedule Groups available in the system.

to remove the submission fro	assignments are shown be om that Schedule Group on		move' checkbox by	a current assignme
Select the 'Add' checkbox for button to confirm the assignr				
You may also enter a Submis schedule due dates for tasks			o this submission. T	his will be used to
	Cancel	Proceed		
			Status	Remove
Current Schedule Group A	Assignment:	Spring Issue	Open	Remove
Current Schedule Group A Submission Target Online	_			Remove
-	Publication Date:	04/23/2007	Open	
Submission Target Online	Publication Date:	04/23/2007	Open	cation Date Ad
Submission Target Online Schedule Group Descripti	e Publication Date:	04/23/2007	Open (mm/dd/yyyy) SG Target Publi	cation Date Ad
Submission Target Online Schedule Group Descripti Fall Issue	e Publication Date:	04/23/2007	Open (mm/dd/yyyy) SG Target Publi Sep 07 2007 12:(cation Date Ad DOAM C

Whether accessed via the <u>Assign to Schedule Group</u> Action Link or the <u>Change Schedule Group</u> Action Link, after selecting more than one Schedule Group to add the submission to, click the 'Proceed' button. A new *Confirm Controlling Schedule Group* page displays, listing all selected Schedule Groups from the prior page. If one Schedule Group was previously selected, this displays the key icon (is the current Controlling Group). Use the radio buttons in the "Controlling Group" to change the Controlling Group, or to proceed with the current group as the Controlling group.

Controlling Gro Production Tasl Pages is also sy	hen a Submission is assigned to multiple Schedule Groups, one of those groups must be designated as the ontrolling Group' for that submission. The Submission's Controlling Group is used when determining Submission oduction Task Due Dates and when copying Target Dates to Actual Dates. The Submission's Target Number of ges is also synchronised with the value from the Controlling Group. here applicable, the Controlling Group will be identified by an 🖉 icon.									
Controlling Group	Current Schedule Group Assignments	Schedule Group Status	SG Target Online Publication Date	SG Target Publication Date						
۲	Spring Issue 🤌	Open	Apr 23 2007 12:00AM	Apr 30 2007 12:00AM						
				Mar 31 2014						

Clicking the 'Proceed' button on the *Confirm Controlling Group* page brings the user to a confirmation page showing all Schedule Group assignments for this submission. The Controlling Group is marked by the key icon.

Sample Confirmation Page:

Schedule Group Assignment Confirmation	The submission is now assigned to the following Schedule Groups: Spring 2014: German Spring Issue
	<u>Return to Production Initiated - No Tasks Assigned</u> <u>Production Tasks Menu</u>
	Main Menu

NOTE: If the logged in user does NOT have permission to assign a submission to multiple Schedule Groups, and the user clicks the <u>Change Schedule Group</u> link, the Submission will be added to the new group and will be removed from all other Schedule Groups to which is it already assigned.

NOTE: When adding submissions to a Schedule Group by clicking <u>Edit Group Details</u> in *Manage Schedule Groups* and then clicking the 'Add Submissions' button, this continues to switch submissions from the current schedule Group to the new Schedule Group (if applicable) – even if the user is allowed to assign submissions to multiple Schedule Groups. In v10.2, this functionality will remove the submission from all Schedule Groups to which it currently belongs if you use the 'Select from Submissions Assigned to Other Schedule Groups' option.

The existing Schedule Group-related Merge Fields are still available for use when submissions are assigned to multiple Schedule Groups. These merge fields will always pull information from the Controlling Schedule Group for the submission for which the letter is sent:

- %SCHEDULEGROUP_DESCRIPTION%
- %SCHEDULEGROUP_TARGET_ISSUE%
- %SCHEDULEGROUP_TARGET_ONLINE_PUB_DATE%
- %SCHEDULEGROUP_TARGET_PUB_DATE%
- %SCHEDULEGROUP_TARGET_VOLUME%

The functionality behind the <u>Close Schedule Group</u> Action Link is enhanced to accommodate the case where a submission is in multiple Schedule Groups. When a Schedule Group is closed, only those submissions where the Schedule Group being closed is the Controlling Schedule Group for that submission will have Production ended. Any submission where the Schedule Group being closed is NOT the Controlling Schedule Group remains In Production. This means that a submission may now be assigned to a Closed Schedule group while the submission remains In Production.

A new 'All Open Schedule Groups' item is available for display on Custom *Details* pages. When selected, a table is displayed listing information from all Schedule Groups to which the submission is assigned. A <u>Change Controlling Group</u> link is displayed when the submission is associated with more than one Schedule Group that allows the user (with 'Manage Schedule Groups' permission enabled). Clicking this link brings the user to the new *Confirm Controlling Schedule Group* page (see above for information) where he can change the designated Controlling Group from the *Details* page. The existing Schedule Group-related fields continue to display the information related to the Controlling Schedule Group.

	Det			uscript Number: I ration of a new fe					
		C	Cancel	Save Save and Close					
	Pro	duction Tai	rget Infor	rmation Production Actual I	information				
Publish Information:	Publish Information								
Production Status:	In Production: Ready for Cop	edit; [Not	Copyedit	ed]					
Date Entered Production:	Feb 08 2011 01:44PM								
Date Production Completed:									
				Schedule Group					
	Schedule Group: Change	Controllin	g Group	Schedule Group Targets:		Submission/	Schedule Group:		
	Description	Volume	Issue	Online Publication Date	Publication Date	TOC Position	Number of Pages	Start Page	End Pag
Schedule Groups:	Spring 2014: German 🥝			Mar 04 2014 12:00AM	Mar 31 2014 12:00AM	2	0		
	Spring Issue	2	1	Apr 23 2007 12:00AM	Apr 30 2007 12:00AM	14	0		
Schedule Group.									
Submission Target Publication Date:	03/31/2014 00:00:00								
Schedule Group Target Online Publication Date:	Mar 04 2014 12:00AM								
Schedule Group Target Publication Date:	Mar 31 2014 12:00AM								
Schedule Group Target Volume:									
Schedule Group Target Issue:									
Duplicate Submission Check:									

Partial Details *sample page displayed*:

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TO CONFIGURE:

To allow Editor roles or Publisher roles to assign one submission to Multiple Schedule Groups, go to RoleManager, and select the Editor role or Publisher role and select/check the new "Assign Submissions to Multiple Schedule Groups" permission, a sub-permission of the existing "Manage Schedule Groups" permission.



	Edit Role Definition
Role Name:*	Managing Editor
	Maximum Role name is 40 characters.
	n. Note : in boxes with multiple rows displayed, you may select or deselect multiple terms by c CTRL (PC) or CMD/Apple key (Mac) when clicking.
	Expand All Collapse All
New Submissions	
Reviewer Invitations	
Editor Decisions	
General Searching and View	<i>r</i> ing
Edit Submission	
	Data
Administrative and Reportin	ig Functions
Cross-Publication Login	
ProduXion Manager	
✓ [@] Create Submission	1
✓ ◎Initiate Production	Manually
🗹 🥯 Allow Task Assignr	ment and Assignment to Schedule Group when Initiating Production
☑ @Serve as Correspo	nding Production Editor
✓ @Change Correspon	Iding Production Editor
☑ [@] View Schedule Gro	DUDS
✓ ^Q Manage Schedule	Groups
	nissions to Multiple Schedule Groups
	its when Copying a Group
	arget Online Publication Date
✓ Quit equinibrien to ✓ @View Production De	-
	Details Layout Production Fields Layout
✓ Ose Froduction D	
✓ Oview Production Si	
View All Submissio	
Gend Production/Re	
✓ ØAssign Submission	
☑ @Assign Schedule G	Broup Production Task
Cancel Production	Task Assignment



Sample Publisher Role Manager page:



To add the new 'All Open Schedule Groups' field to custom Details layouts, go to PolicyManager, Define Details Page Layouts, and edit an existing layout (or add a new layout). Click the <u>Select Items to Display</u> link, and in the 'Publishing and Production Information' section, select/check the new "All Open Schedule Groups" option. Additionally, the existing Schedule Group-related fields are enhanced with labels to define that they relate to the Controlling Schedule Group for this submission.



Partial page display:

	Select Items to Display for Production Fields Layout	
Select the information to app	ear on the Details page	
* Items marked with an aster them the additional permissio	isk are subject to additional permissions, which may mean that some users will not be able to v on to do so in RoleManager.	iew them until you give
	Expand All Collapse All	
Ŧ	Links	
+	Information Submitted by Author	
÷		
±	Proposal Specific Information	
±	Additional Manuscript Details Key Workflow Dates and Status Information	
Ŧ	Information for Invited Article Types	
Ŧ	Assignments and Invitations	
Ξ	Publishing and Production Information	
	All Open Schedule Groups	
	Schedule Group (Controlling Schedule Group Description)	
	Schedule Group Target Online Publication Date (Controlling Group)	
	Schedule Group Target Publication Date (Controlling Group)	
	Schedule Group Target Volume (Controlling Group)	
	Schedule Group Target Issue (Controlling Group)	
	Position in Schedule Group Contents (Controlling Group)	
	☑ Target Number of Pages (Submission/Controlling Group)	
	☑ Target Start Page (Controlling Group)	
	☑ Target End Page (Controlling Group)	
	I Black and White Image Count	
	☑ Color Image Count	

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Copy Schedule Group

Some Publications publish in multiple languages, such as English and German. On occasion, the same set of submissions may be included in both language editions, where one published set may be translated. In PM v10.1, a submission can only belong to one Schedule Group at a time, and existing Schedule Groups cannot be copied to create new Groups.

New in PM v10.2, publications may now copy Schedule Groups to create a new Schedule Group with the same Table of Contents (TOC) entries, and the same target information. Users with the existing 'Manage Schedule Groups' permission will now see a <u>Copy Group</u> Action Link for each Schedule Group in the *Manage Schedule Groups* folder.



When the user with 'Manage Schedule Groups' permission (but no sub-permissions) clicks the <u>Copy Group</u> link, the Schedule Group metadata is copied to create a new Schedule Group. No submission or Header records are copied; only the metadata is copied. The user is brought to a new *Schedule Group Copy* page, where the he sees the copied metadata that can then be edited as desired. The new Schedule Group Description is the same as the copied Group with the text "(Copy)" appended to the end. All other metadata is copied, except the Schedule Group Notes. This field is replaced with text noting that this was copied from an existing Schedule Group: "Copied from [Original Schedule Group Description Field] on [Date/Time of Copy]".

Sample Copy Display:

	Schedule Group Copy
Subm	it Cancel Submit and Add Submissions to Group
Schedule Group Description:	Insert Special Character Summer Issue (Copy) Maximum Schedule Group Description is 100 characters
Schedule Group Notes:	
Copied from Summer Issue on Sep 11 2013 12:04PM	^
Schedule Group Target Online Publication Date:	07/20/2007 (mm/dd/yyyy)
Schedule Group Target Publication Date:	07/27/2007 (mm/dd/yyyy)
Schedule Group Target Publication Volume:	2
Year:	
Schedule Group Target Publication Issue:	2
Target Number of Submissions:	8
Page Budget:	200
Black and White Image Budget:	0
Color Image Budget:	0
Table of Contents No submissions have yet been added to this Schedule Group. Insert Header	
Subm	nit Cancel Submit and Add Submissions to Group

If the logged in user has the new "Copy Contents when Copying a Group" sub-permission enabled under "Manage Schedule Groups" but NOT the new "Assign Submissions to Multiple Schedule Groups" sub-permission, then upon clicking the <u>Copy Group</u> link for any Schedule Group, she is brought to a new *Confirm Data to Copy* page. Three options are available, allowing the user to select whether to:

- Copy Schedule Group Metadata Only this will copy the details of the group, but will not copy any TOC Headers that may be included in the group being copied.
- Copy Schedule Group Table of Contents Only this will copy only the TOC Headers, but will not copy any details, such as Target Publication dates or page budget information.
- Copy Schedule Group Metadata plus Table of Contents this will copy the details of the group and any TOC Headers that are included in the group.

When either 'Table of Contents' option is selected, submissions that are in the originating Schedule Group will not be copied to the new Schedule Group; only the TOC Headers.

User cannot copy Submissions:

Copy Schedule Group: Confirm Data to Copy
information to copy when creating the new Schedule Group. When copying TOC Header pendent copy of each Header is created in the new group.
Opy Schedule Group Metadata only
Copy Schedule Group Table of Contents only
Copy Metadata plus Table of Contents

If the logged in user has the new "Copy Contents when Copying a Group" sub-permission enabled and the new "Assign Submissions to Multiple Schedule Groups" sub-permission (see the 'Include Submission in Multiple Schedule Groups' section of these release notes), then the same *Confirm Data to Copy* page is displayed as above, with different instructions, and additional functionality connected to the two 'Table of Contents' options.

- Copy Schedule Group Metadata Only this will copy the details of the group, but will not copy any TOC Headers that may be included in the group being copied.
- Copy Schedule Group Table of Contents Only this will copy all submissions and TOC Headers, but will not copy any details, such as Target Publication dates or page budget information.
- Copy Schedule Group Metadata plus Table of Contents this will copy the details of the group and any submissions and TOC Headers that are included in the group.

NOTE: When copying the TOC entries, submission records are not duplicated; new TOC entries are created that link the submissions to the copied Schedule Group in addition to the original Schedule Group. TOC Headings *are* duplicated when copied, creating new records for the copied Group.

User can copy Submissions:

Submissions are not created	on to copy when creating the new Schedule Group. When copying TOC entries, new l; instead, the existing Submissions are initially assigned to both the original and is, a new, independent copy of each Header is created in the new group.
	Oppy Schedule Group Metadata only
	O Copy Schedule Group Table of Contents only
	Copy Metadata plus Table of Contents

Upon clicking 'Proceed', the user is brought to the new *Schedule Group Copy* page (as displayed above), and any copied TOC entries (submissions or TOC Headers) are displayed in the lower portion of the page.

The user may remove any submission from the copied Schedule Group by clicking the <u>Remove</u> from Group link in the Action column.

ctions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status		Section/Category	Target Online	Submission Actual Online Date	Black and White Image Count	Imag
move from Group	1		Original Study	Anthony Author, MD	0			Underway;	This is a training for JADA				0	0
move from Group	2		Original Study	Anthony Author, MD	0				Royal society	Primer			0	0
move from Group	3		Original Study	Kevin M. Carlson	0				This is a demo for Haworth Press			Jun 25 2004 12:00AM	0	0
move from Group	4		Special Comments	Mary François Smith, PhD	0			Page Layout Underway			May 31 2007 12:00AM		0	0
move Header	5		Alison is Testing		0									

Partial page displayed; Copied TOC:

The new Schedule Group is not committed until either the 'Submit' or the 'Submit and Add Submissions to Group' button is clicked. Clicking 'Cancel' at this point will return the user to the *Confirm Data to Copy* page.

TO CONFIGURE:

To allow Editor roles or Publisher roles to copy contents of a schedule group when copying Schedule Groups, go to RoleManager, and select the Editor role or Publisher role and select/check the new "Copy Contents when Copying a Group" permission, a sub-permission of the existing "Manage Schedule Groups" permission. Sample Editor Role Manager page:

	Edit Role Definition
	Role Name:* Managing Editor
	Maximum Role name is 40 characters.
Check the functions	that this role is permitted to perform. Note : in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.
	Expand All Collapse All
	New Submissions
	⊞ Editor Assignment
	Reviewer Invitations
	Editor Decisions
	General Searching and Viewing
	Edit Submission
	⊞ Discussion Forums ⊞ Transmittal Form
	☑ Viewing and Editing People Data
	H Flag Icons H
	Administrative and Reporting Functions
	Cross-Publication Login
	ProduXion Manager
	☑ [©] Create Submission
	🗹 🞯Initiate Production Manually
	☑ [©] Allow Task Assignment and Assignment to Schedule Group when Initiating Production
	☑ [©] Serve as Corresponding Production Editor
	Change Corresponding Production Editor
	☑ [©] √iew Schedule Groups
	☑ [©] Manage Schedule Groups
	Accian Submissions to Multiple Schedule Croups
	Copy Contents when Copying a Group
	Copy contains mon copying a creap
	View Production Details
	©Use Production Details Layout Production Fields Layout
	✓ Øview Production Status Grid
	☑ [©] √iew At-Risk Submissions
	☑ [©] √iew All Submissions in Production
	©End Production/Return to Production
	Assign Submission Production Task
	☑ 🥯 Assign Schedule Group Production Task
1	☑ [©] Cancel Production Task Assignment

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Sample Publisher Role Manager page:

Edit Role Definition
Role Name:* Production Team
Check the functions that this role is permitted to perform.
Expand All Collapse All
General Searching and Viewing
⊞ Transmittal Form
Cross-Publication Login
□ ProduXion Manager
Initiate Production Manually
Serve as Corresponding Production Editor
Change Corresponding Production Editor
View Schedule Groups
Manage Schedule Groups
Assign Submissions to intuitiple Schedule Groups
Copy Contents when Copying a Group
C Calif. On transmission Tanget Online Data Statistics Data
✓ ^o View Production Details
OUse Production Details Layout Default Production
✓ Oview Production Status Grid

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Import Submission Information on Task Completion

In v10.1, Publications that use the Production Tracking feature in ProduXion Manager may configure Submission Production Tasks to FTP files and submission metadata to vendors for completion of specific tasks. Vendors may then transmit files back into PM when completing the Submission Production Task that are then uploaded as Companion Files for the submission. Some Publications would like to allow vendors to import submission metadata into the system, rather than requiring that information to be manually updated in PM.

New in PM v10.2, Submission Production Tasks may be configured to send an "Aries Import .XML" file as part of the transmittal (either using a new "Aries Export" transmittal method, or by electing to include this with an existing transmittal method). Recipient vendors may then populate specific data elements in the .XML that can then be used to populate feed data back into the system, such as Actual Online Publication Date, Publication Date, or pagination information. When the Submission Production Task has the new "Aries Import" Import Profile configured, then when the vendor sends the Aries Import XML file back as part of the task completion files, the data elements provided may be automatically populated to the appropriate fields in PM. This eliminates the need for information (such as Actual Publication Date) to be manually entered.

TO CONFIGURE:

In PolicyManager, go to 'Configure Submission Production Tasks' to edit an existing task to use this new task transmittal method, or create a new task. In the 'FTP Options' section of the page, configure the following options.

If you do not currently use a Transmittal Method but wish to take advantage of this new feature, select "Aries Export" from the Submission Production Task Transmittal Method drop-down. Set/check the "Include Aries Import XML file in transmittal" option to ensure the Import XML file is included. This is the file that must be used for the Aries Import method to successfully import metadata.

NOTE: You may use the Aries Export method without using the Aries Import option if you need XML to be exported from the system and do not have a specific DTD requirement, and do not need to import metadata back into the system. "Aries Export" can also be used in conjunction with "Aries Import".

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Submission Production Task Transmittal Method:	Aries Export	*
	Allow task assignment and FTP w Files	ithout Assignme
	🤟 🗹 Include Aries Import XML file in tr	ansmittal.
FTP Server address (e.g. ftp.ariessys.com)	ftp.server.com	
Username	username	
Password	password	
Subdirectory:		
E-mail Address (for transmittal notification):		
Submission Production Task Import Profile:	Aries Import	*
E-mail Address (for import notification):		
	XML file is required	
	Select Fields for Import	

Partial page display; Add/Edit Submission Production Tasks:

If you are currently using an existing Production Task Transmittal Method (such as 'NLM 3.0 Production Task Transmittal') you may still use this new Aries Import feature by setting/checking the "Include Aries Import XML file in transmittal" option. This ensures the Aries Import XML file is included in the zip file FTP'd to the vendor as this is the XML file that must be used for the Aries Import method to successfully import metadata.

Partial page display; Add/Edit Submission Production Tasks with existing method selected:



Next, click the <u>Select Fields for Import</u> link. This opens a new page, where you can select which data element(s) you wish to include in the Aries Import XML file. Fields with a hardcoded checkmark are identifying fields that are sent in the XML file to allow vendors do identify the manuscript and cannot be overwritten on import. Any other element may be selected, and then may be updated by the vendor and FTP'd to Aries FTP server within a zip file when the task is complete.

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NOTE: If a data element is not checked/selected, it cannot be imported when the XML file is returned. NOTE: The Additional Manuscript Detail fields appear only if the publication is configured with AMD fields.

Select Fields for Import *page*:

Select Fields For Import
Select the fields to be imported for this production task. Identifying information is designated with a check mark and cannot be overwritten during import.
These fields will also be written to the Aries Import XML file sent in the production task transmittal, if the checkbox "Include Aries Import XML file in the transmittal" is selected on the Production Task configuration page.
Expand All Collapse All
Identifying Information:
Added if General Manuscript Information is included:
✓ Unique Document ID
✓ DOI
✓ Manuscript Number
✓ Revision Number
✓ Article Type
Added if an Additional Manuscript Detail Fields is included:
✓ Additional Manuscript Detail ID (a separate one is included for each AMD)
Added if Scheduled Group TOC Information is included:
✓ Schedule Group Description
✓ Schedule Group TOC Item ID
[CONTINUED ON NEXT PAGE]

□ General Manuscript Information:
Article Title
Short Title
Abstract
Target Online Publication Date
Actual Online Publication Date
Publication Date
Print Pages of Article
Page Range
Publication Start Page
Publication End Page
Publication Volume Number
Publication Issue Number
Table of Contents Position
Black and White Image Count
Color Image Count
Date Production Was Completed
Additional Manuscript Details
Fast Track Candidate
Schedule Group TOC Information
Target Table of Contents Position
Target Start Page
Target End Page
Target Number of Pages
Expand All Collapse All
Cancel Submit

NOTE: If you select/check the 'XML file is required' option, the task import will fail if the vendor does not include the Aries Import XML file in the zip file returned to the Aries FTP server.

Import Schedule Group Information on Task Completion

In v10.1, Publications that use the Production Tracking feature in ProduXion Manager may configure Schedule Group Production Tasks to FTP files and schedule group metadata to vendors for completion of specific tasks. Vendors may then transmit files back into PM when completing the Schedule Group Production Task that are then uploaded as Companion Files for the Schedule Group. Some Publications would like to allow vendors to import Schedule Group metadata into the system, rather than requiring that information to be manually updated in PM.

New in PM v10.2, Schedule Group Production Tasks may be configured to send an "Aries Import .XML" file as part of the transmittal (using the existing "General Group Production Task Export" method). Recipient vendors may then populate specific data elements in the .XML that can then be used to populate data in the system, such as Schedule Group Table of Contents (TOC) information. When the Schedule Group Production Task has the new "Aries Import" Import Profile configured, then when the vendor sends the Aries Import XML file back as part of the task completion files, the data elements provided may be automatically populated to the appropriate fields in PM. This eliminates the need for information (such as Target Start Page and Target End Page for each submission in the Schedule Group TOC) to be manually entered.

TO CONFIGURE:

In PolicyManager, go to 'Configure Schedule Group Production Tasks' to edit an existing task to use this new task transmittal method, or create a new task. In the 'FTP Options' section of the page, configure the following options.

If you do not currently use a Transmittal Method but wish to take advantage of this new feature, select "General Group Production Task Export" from the Group Production Task Transmittal Method drop-down. Set/check the "Include Aries Import XML file in transmittal" option to ensure the Import XML file is included in the exported zip file. This is the file that must be used for the Aries Import method to successfully import metadata.

FTP Options	
Group Production Task Transmittal Method:	General Group Production Task Export 💌
	Allow task assignment and FTP without Assignment Files
	Include Aries Import XML file in transmittal.
FTP_Server Address (e.g ftp_messys.com):	ftp.server.com
Username	username
Password	password
Subdirectory:	
E-mail Address (for transmittai notification):	
Group Production Task 🖰 Import Profile:	Aries Import 🗸
E-mail Address (for import error notification):	
	XML metadata file is required for import <u>Select Fields for Import</u>

Partial page display; Add/Edit Submission Production Tasks:



Next, click the <u>Select Fields for Import</u> link. This opens a new page, where you can select which data element(s) you wish to include in the Aries Import XML file. Fields with a hardcoded checkmark are identifying fields that are sent in the XML file to allow vendors do identify the schedule group and manuscript and cannot be overwritten on import. Any other element may be selected, and then may be updated by the vendor and FTP'd to the Aries FTP server within a zip file when the task is complete.

NOTE: If a data element is not checked/selected, it cannot be imported when the XML file is returned.

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Select Fields for Import page:

Select Fields For Import
Select the fields to be imported for this production task. Identifying information is designated with a check mark and cannot be overwritten during import.
These fields will also be written to the Aries Import XML file sent in the production task transmittal, if the checkbox "Include Aries Import XML file in the transmittal" is selected on the Production Task configuration page.
Expand All Collapse All
□ Identifying Information:
✓ Journal ID, ISSN and full title
✓ Production Task Description
 ✓ Schedule Group ID ✓ Schedule Group TOC Item ID
✓ Manuscript Number (for each MS in the TOC)
✓ DOI (for each MS in the TOC)
✓ Article Title (for each MS in the TOC)
Schedule Group Information
Schedule Group Description
Target Online Publication Date
Target Publication Date
Target Publication Volume
Target Publication Issue
Schedule Group Target Number of Submissions
Schedule Group Page Budget
Schedule Group Black And White Image Budget
Schedule Group Color Image Budget
Schedule Group Notes
Schedule Group Year
□ Schedule Group TOC Information
Target Table of Contents Position
Target Start Page
Target End Page
Target Number of Pages
Header Text
Expand All Collapse All
Cancel Submit

NOTE: If you select/check the 'XML file is required' option, the task import will fail if the vendor does not include the Aries Import XML file in the zip file returned to Aries FTP server.

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Custom Reports – Schedule Group Enhancements

In PM v10.2, submissions may now be associated with more than one Schedule Group at the same time. One Schedule Group is always identified as the 'Controlling' Schedule Group; the Group from which due dates are calculated, etc. Some of the existing Views available in Custom Reports are enhanced to accommodate this new functionality.

The following Views contain Schedule Group TOC-specific fields, which will be retrieved from the Controlling Group for the submission:

- Manuscript and Keywords View
- Manuscript Status History View
- Submission Production Tasks View
- Submission Production View

A new "Controlling Group Indicator" field is added to the "Schedule Group Table of Contents and Header View". This field is populated for Submission Records that are returned when a report is run to denote which Schedule Group is the controlling group for that submission:

Custom Report - Schedule Groups Table of Contents and Headers View
Select the fields to include in the report.
Cancel Submit
Check All Clear All
Publication Code
Schedule Group Description
Schedule Group ID
Schedule Group Notes
Schedule Group Page Budget
Schedule Group Black And White Image Budget
Schedule Group Color Image Budget
Target Publication Date
Target Publication Volume
Target Publication Issue
Target Online Publication Date
Schedule Group Target Number of Submissions
Schedule Group Year
Target Table of Contents Position
Controlling Group Indicator
Header Text
<u>Manuscript Number</u>
Revision Number
Unique Document ID

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MERGE FIELD ENHANCEMENTS

Editor Summary Assignment Merge Fields

In EM/PM v10.1, three sets of merge fields are available for use in sending Editor assignment information in letters. These merge fields, used primarily in Automated Editor Summary Reminders but available for use in any letters sent to Editors, display information from three key folders:

- New Invitations
- New Assignments
- Submissions with Required Reviews Complete

New in EM/PM v10.2, three new deep link merge fields are added that can be used in conjunction with the existing reminder-related merge fields for Editors, allowing them to log directly into the above listed folders.

Three deep links can be used to log the Editor into

- **%EDITOR_NEW_INVITATIONS_FOLDER_DEEP_LINK%** Fully logs the user into his Editor Role and brings him to the *New Invitations* folder. A deep link displays as the text <u>Log in to New Invitations Folder</u> in an HTML-formatted letter.
- **%EDITOR_NEW_ASSIGNMENTS_FOLDER_DEEP_LINK%** Fully logs the user into his Editor Role and brings him to the *New Assignments* folder. A deep link displays as the text <u>Log in to New Assignments Folder</u> in an HTML-formatted letter.
- %EDITOR_REQUIRED_REVIEWS_COMPLETE_FOLDER_DEEP_LINK% -Fully logs the user into his Editor Role and brings him to the *Submissions with Required Reviews Complete* folder. A deep link displays as the text Log in to Required Reviews <u>Complete Folder</u> in an HTML-formatted letter.

An additional merge field is added called

%EDITOR_NEW_INVITATIONS_SUBMISSIONS_WITH_DEEP_LINKS%. This merge field resembles the existing **%EDITOR_NEW_INVITATIONS_SUBMISSIONS%** merge field, but for each submission listed, two deep links are added allowing the Editor to Accept or Decline Invitations directly from the letter.

When this new merge field is used, the submissions in the New Invitations folder display in one of the following ways (depending on if the letter is an HTML or Text format):

• HTML:

n. %MS_NUMBER%: %ARTICLE_TITLE%

(Number of days submission has been in the folder) Days Elapsed Since Invitation <u>Accept Editor Invitation</u> <u>Decline Editor Invitation</u> All Authors on the submission by order defined for the submission/revision

First 75 words of Abstract {If the abstract is truncated, three dots ... follow the 75th word to indicate that a truncation has occurred.}

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• Text:

n. %MS_NUMBER%: %ARTICLE_TITLE% (Number of days submission has been in the folder) Days Elapsed Since Invitation

Click this link to AGREE to handle this manuscript. <u>http://DEEP_LINK</u>

Click this link to DECLINE to handle this manuscript. <u>http://DEEP_LINK</u>

All Authors on the submission by order defined for the submission/revision

First 75 words of Abstract {If the abstract is truncated, three dots ... follow the 75th word to indicate that a truncation has occurred.}

TO CONFIGURE:

To configure expiration policies for the new Deep Links, go to PolicyManager, and click the existing <u>Set Editor Deep Link Policy</u> link in the 'General Policies' section. For each of the three new Deep Links, you can configure the Deep Link to expire after a specific number of clicks, a specific number of days, or the earlier of the two settings.



Set Editor Deep Link Expiration
As a security measure, the journal should specify how long each Editor Deep Link listed below remains active. To keep a link active indefinitely, do not check either box. If both boxes are checked, the link expires when the first criteria is met.
%EDITOR_DEEP_LINK% This deep link is related to a specific submission. It carries out a full login and takes the Editor to a Search Results Page displaying the associated submission.
Expire link after 1 clicks
Expire link after days
%EDITOR_MAIN_MENU_DEEP_LINK% This deep link carries out a full login and takes the Editor to the Editor Main Menu.
Expire link after 1 clicks
Complex Kinks address darge
%EDITOR_NEW_INVITATIONS_FOLDER_DEEP_LINK% This deep link carries out a full login and takes the Editor to the New Invitations folder.
Expire link after 1 clicks
Expire link after days
%EDITOR_NEW_ASSIGNMENTS_FOLDER_DEEP_LINK%
This deep link carries out a full login and takes the Editor to the New Assignments folder.
Expire link after 1 clicks
Expire link after days
%EDITOR_REQUIRED_REVIEWS_COMPLETE_FOLDER_DEEP_LINK% This deep link carries out a full login and takes the Editor to the Submissions with Required Reviews Complete folder.
Expire link after 1 clicks
Expire link after days
Cancel Submit Back to PolicyManager

To include any of these merge fields in existing letters, or to create a new letter, go to PolicyManager, <u>Edit Letters</u>, and select a letter to edit or add a new letter.

NOTE: It is recommended that the three new Deep Link Merge Fields be included in conjunction with the relevant existing merge fields for clarity on the part of the receiving editor:

- %EDITOR_NEW_INVITATIONS_TOTAL%
- %EDITOR_NEW_INVITATIONS_DAYS%
- %EDITOR_NEW_INVITATIONS_SUBMISSIONS%
- %EDITOR_NEW_ASSIGNMENTS_TOTAL%
- %EDITOR_NEW_ASSIGNMENTS_DAYS%
- %EDITOR_NEW_ASSIGNMENTS_SUBMISSIONS%
- %EDITOR_REQUIRED_REVIEWS_COMPLETE_TOTAL%

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• %EDITOR_REQUIRED_REVIEWS_COMPLETE_DAYS%

• %EDITOR_REQUIRED_REVIEWS_COMPLETE_SUBMISSIONS%

NOTE: It is recommended that the new

%EDITOR_NEW_INVITATIONS_SUBMISSIONS_WITH_DEEP_LINKS% merge field be used in place of the existing **%EDITOR_NEW_INVITATIONS_SUBMISSIONS%** merge field.

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Batch Task Assignment Submission List

New in PM v10.2, Publications may now assign Submission Production Tasks to one assignee in a batch. When this functionality is used (see the "Assign Submission production Tasks in Batches" section of these release notes), the Task recipient receives one letter for all assignments. A new **%BATCH_ASSIGNMENT_SUBMISSION_LIST%** merge field is added to PM that can be included in the assignment letter. This merge field will list out the selected submissions as follows:

- i) A 'Submission:' label, followed by the Submission Identifiers configured under '*PolicyManager>Configure Identifiers Displayed in Production Tracking*', separated by commas
- ii) A semi-colon, space and a 'Due:' label, followed by the assignment due date, in the Publication Defined Date Format.
 - (1) NOTE: when previewed, the Due Dates cannot be displayed; in this case, each Due Date is replaced by the placeholder text "[Due Date]".

Sample format:

Submission: Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE), Demonstration of a new feature; Due: Sep 06 2013 11:59PM

Submission: Simple Simon, title; Due: Sep 06 2013 11:59PM

TO CONFIGURE:

To include the new **%BATCH_ASSIGNMENT_SUBMISSION_LIST%** merge field in the Batch Assignment Letter, go to PolicyManager, <u>Edit Letters</u>, and Edit an existing letter, or add a new letter. Add the new merge field as desired.

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