CONFIDENTIAL AND PROPRIETARY

Release Notification

em Editorial Manager®

pm ProduXion Manager®

cm Commerce Manager™

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

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

Editorial Manager/ProduXion Manager 10.2 General Release Notification

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

Enter the names of anyone who contributed to your manuscript by entering all required information and clicking the 'Submit' button. **This journal requires that your co-authors are identified by an ORCID number. They can obtain an ORCID number by visiting: www.orcid.org**

Cancel	Submit	Submit and Add Another Author

Insert Special Character

Field	Value
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 select if this is the corresponding author ☑

PLEASE NOTE: If you continue with this author as the Corresponding Author, then once you build the PDF you will no longer have access to the submission. This author must then log into the system and approve the PDF to complete the submission of your manuscript.

| Cancel | 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.

Summary Following Attach Files

Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required Items are marked with *.

	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

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:

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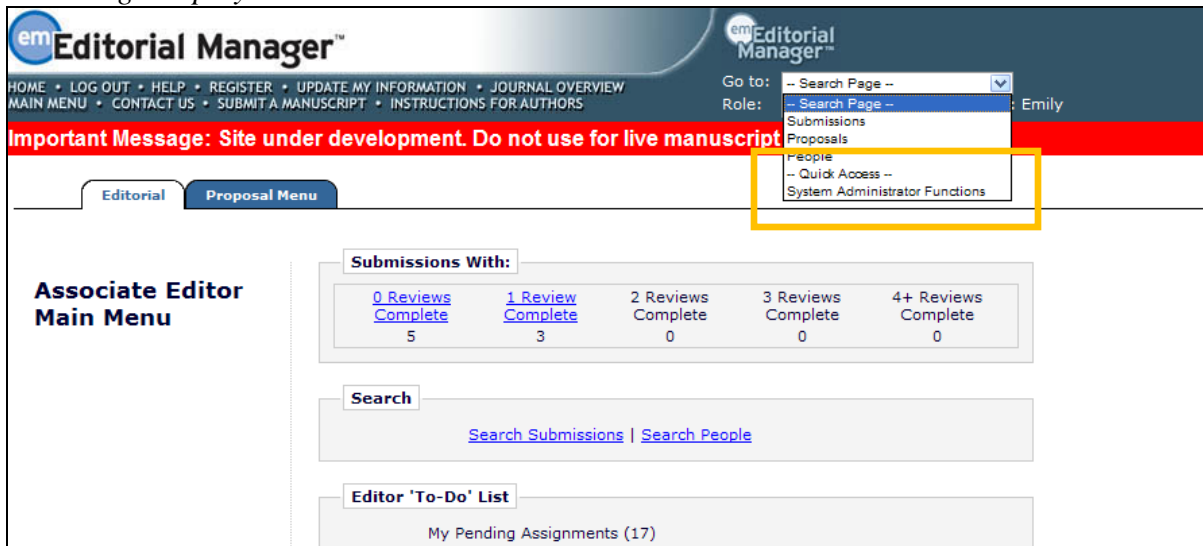
TO CONFIGURE:
No configuration is required for this new feature. On upgrade to v10.2, Authors will see this new warning when they have selected an Other Author as the Corresponding Author on the 'Add/Edit/Remove Authors' step of the submission process.

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:

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.

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 (**D**), 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.

Sample New Submissions *folder:*

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 Check Results</u> link, and on the *Duplicate Submission Check Results* page.

Sample page:

Duplicate Submission Check Results – Feb 12 2013 3:32PM
Submission "Applications of Graphene in Technology"

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.

Potential Duplicate Submissions

EM Duplicate Score: 100%

Manuscript/Submission Number	Initial Date Submitted	Revision	Current Status	Article Title	Authors	Article Title Similarity	Author Similarity	Abstract Similarity
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-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-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%
SALLYDEV100-S-10-00345 View Submission Details	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 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-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-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%
SALLYDEV100-D-10-00345 View Submission Details	Jul 14 2011 11:58AM	1	Completed	Flexible Touch Screens with Printed Graphene	Buzz Aldrin, PhD; John Nash, PhD; Will Smith, PhD	45%	53%	53%
SALLYDEV100-D-10-00230 View 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 View 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 View 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 View Submission Details	Jan 30 2013 3:42PM	2	With Editor	Experimental Methods in Technology	Buzz Aldrin, PhD; Nick Fry, PhD; Mary Tyler Moore, PhD	33%	33%	51%
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%
SALLYDEV100-D-10-00345 View Submission Details	Oct 29 2012 11:34AM	1	Completed	Industrial Applications of Materials	Buzz Aldrin, PhD; Mary Chaplin, PhD	27%	51%	49%
SALLYDEV100-D-10-00230 View 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 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%
SALLYDEV100-D-10-00230 View 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 View Submission Details	Jul 14 2011 11:58AM	1	Completed	Applications in Neuroscience	Elizabeth Barrett, PhD; John Fry, PhD; Geraldine Chaplin, PhD	15%	16%	16%
SALLYDEV100-D-13-00130 View 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 View Submission Details	Aug 23 2012 9:32AM	1	Under Review	Applications of Information Technology	Keith Moon, PhD; John Fry, PhD; Mary Chaplin, PhD	13%	15%	16%

CrossCheck/iThenticate Results

Close

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 Submission Check Results</u> link may also be displayed on the following:

Technical Check page:

Default *Details* page*:*

File Inventory page:

File Inventory Manuscript Number: Unassigned
Michael Green (BOSNIA AND HERZEGOVINA): "Demonstration of Duplicates II" (View Submission)

Listed below are the files included in the current version of the latest Revision of the submission. Click the Download link to download the individual source file. To download a zip file containing multiple items, select the items using the check boxes, and then click the 'Download Zip File' button. The 'Check All' and 'Clear All' links may be used to select or unselect all the files. Additional software (such as WinZip) must be installed on your computer in order to unzip (uncompress) the zip file. To initiate CrossCheck, select the file(s) you wish to download and click the 'CrossCheck' button. The selected files will be downloaded to your computer, and a new window will open to the CrossCheck login page (this window remains open in the background). Use your CrossCheck login credentials to sign in, then upload the selected document or zip file. After running the similarity check in CrossCheck, you may return to this window and upload any results as a Companion File, if desired.

If a checkbox does not appear in the 'Select' column for a file, the file is no longer available. Click the Download link in the Action column for more information about the file. (less...)

| Download Selections as Zip File | | CrossCheck | Duplicate Submission Check Results (33%) | | | Close | Save and Close |

■ Submission Files

Check All / Clear All	Action	Item	Description	Item Family	File Name	Size	Modified	QC	Display On TF
☐	Download	Cover Letter	Cover Letter	Default	Demo Cover Letter.doc	25.5 KB	Apr 25 2012 4:24PM		

| Upload Companion File |

| Download Selections as Zip File | | | Close | Save 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>).

PolicyManager Main Menu

Expand All   Collapse All

⊞ **Registration and Login Policies**
⊞ **Status Policies**
⊟ **Submission Policies**

Edit Article Types
Edit Submission Items
Configure Color Codes for Companion Files
Edit Sections/Categories
Edit Classifications
Set Classifications Display Policy
Create Custom Questions
Create Questionnaires
Edit Co-Author Questionnaire Instructions
Define PDF Cover Page Layouts
Select Author's Reviewer Preferences
Set Request Editor or Assign Editor Display Options
Edit Manuscript Geographic Region of Origin
Edit Manuscript Submission Instructions
Configure Manuscript Services Icon
Set Maximum Size of Uploaded File
Set Other Author Parameters
Set Revision File Selection Option
Configure Duplicate Submission Check
Configure Technical Check
Configure Similarity Check
Configure Office 2007 and Higher Support
Configure Author Accept Checkbox

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, Edit Article Types, 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 Type

[Cancel] [Submit]

Article Type: [Perspective]
Maximum Article Type name is 75 characters.
Family: Regular   **Editor Use Only:** ☐
☐ **Hide**   When you **Hide** an Article Type, the Article Type will be deactivated (not available for new or revised manuscripts).
☐ Allow file uploads from arXiv.org server

Similarity Check:
☐ 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 Submission Check:
☐ Check for duplicate submissions to Editorial Manager

You must also enable the check for duplicate submissions on the Configure Duplicate Submission Check page.

Author Parameters	First Revision	Subsequent Revisions	
Number of days Author has to Revise Submission:	[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.

Partial Page; Editor Role Definition:

Partial Page; Publisher Role Definition:

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 Display</u> link. Select/check the box next to the new 'Duplicate Submission Check' option in the "Links" section.

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

⊟ **Links**
  ☑ Blinded Editors *
  ☑ Technical Check *
  ☐ Additional Manuscript Details *
  ☐ Similarity Check *
  ☑ Duplicate Submission Check *
  ☑ Select Submissions Flags *
  ☑ File Inventory *
  ☑ Publish Information
  ☑ Transmittal Form *

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.

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>
   ○ Use Corresponding Editor's E-mail address
   ○ Use Corresponding Production Editor's E-mail address

Additional Recipients

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

Automatically cc: bcc:
   ☐ ☐ Corresponding Editor
   ☐ ☐ Corresponding Production Editor

   Send copies to the following addresses:
   (Multiple addresses may be entered, separated by a semicolon)
   ☐ cc: [   ]
   ☐ bcc: [   ]

Letter Body:

All lines 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.

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.

Edit Discussion Topic Template

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

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

Discussion Topic Template Name	Insert Special Character
	Second Opinion - Outright Reject?
'Initiate Discussion' Page Custom Instructions	
Topic	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.
	☑ 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 ◯ Notify all active participants

☐ **Hide** When you **Hide** a Discussion Topic Template, it will no longer be available for selection on the Initiate Discussion page.

[Cancel] [Submit]

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 Discussions 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.

Discussions for Manuscript Number: BETSYDEV102-D-13-00007
Kermit the Frog
"Opening a discussion"

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

Close   Start New Topic

TO CONFIGURE:

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

PolicyManager Main Menu

<u>Expand All</u>   <u>Collapse All</u>

⊞ **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**

  <u>Set Discussion Deep Link Expiration</u>

  <u>Configure Discussion Topic Templates</u>

  <u>Configure Automatic Discussion Initiation</u>

⊞ **Linked Submissions Policies**

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.

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 Configure Electronic Calendar Due Date Preferences link. Select/check the box for the new "Reviewer Assigned" option.

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"

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:

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).

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 Editor 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

- Personal Keywords
- Secondary Last Name
- Secondary First Name

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:

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 PolicyManager) 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:

Editor Selection Summary - Manuscript Number BETSYDEV101-D-13-00004
Kermit the Frog
"Demonstration of Resend Email"

Manuscript Details ▶ ▽

Below is a list of suggested candidates based on classification matches with the manuscript. (more...)

Manuscript Classifications	Manuscript Keywords
(1) CATARACT; (2) ANATOMY; (3) BIOCHEMISTRY (eye);	

Search for Editors

Insert Special Character   Value Options

(	Criterion	Is/Is not	Selector	Value	)	
∨	Last Name ∨	is ∨	Begins With ∨		∨	Add

Clear   Search

Candidates

Select All / Clear All   Page: 1 of 1 (8 total candidates)   Display 500 ∨ results per page.

Update Invitation Order   Cancel   Customize Letters & Submit Queue   Submit Queue without Customizing Letters   Assign Editor Now

Select	Invitation Order	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations	Available during next 30 days
☐		Associate Editor	Anthony Author, MD ▽ ♻	Harvard Medical School	0	0	1	2	Yes
☐		Staff Editor	Jungle Book, ph ▽		0	0	1	2	Yes
☐		Associate Editor	Annie The Dog, PhD ▽		0	0	11	2	Yes
		Editor-in-Chief (This editor is already assigned to the current submission)	Edward Editor, MD ▽	Duke Medical School	0	0	49	1	Yes
☐		Associate Editor	Emily Editor, MD ▽	University of Colorado	0	0	11	2	Yes
☐		Editor-in-Chief	Lyndon Holmes ▽		0	0	1	1	Yes
☐		Editor-in-Chief	Smartbot Smartbot ▽		0	0	1	1	Yes
☐		Editor-in-Chief	Buttercup Swatski, CGC ▽		0	0	1	0	Yes

Update Invitation Order   Cancel   Customize Letters & Submit Queue   Submit Queue without Customizing Letters   Assign Editor Now

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

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, Configure Suggest Editor Preferences, 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

Editor Selection Summary Options

Display candidates: ○ By classification matches ● List all Editors

Number of Editor candidates displayed on page (maximum 300) 50

Number of candidates selected by default 9

Number of invitations to be sent immediately when queue is confirmed 1

Batch 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.)

Defer first automated batch if within 12 hours of initial invitations sent. If the initial invitations were sent less than this number of hours before the next batch cycle, that cycle is skipped and the next invitations are sent in the following batch cycle.

Number of invitations to send in first batch cycle 2

Number of days between automated batches 1

Number of invitations to send in second batch cycle 3

Number of invitations to send in all subsequent batch cycles 3

Cancel   Submit

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.

Configure Suggest Editor Preferences

Editor Selection Summary Options

Display candidates: ⦿ By classification matches   ○ List all Editors

Number of Editor candidates displayed on page (maximum 300) [0]

Number of candidates selected by default [0]

Number of invitations to be sent immediately when queue is confirmed [1]

Batch 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.)

Defer first automated batch if within [12] hours of initial invitations sent. If the initial invitations were sent less than this number of hours before the next batch cycle, that cycle is skipped and the next invitations are sent in the following batch cycle.

Number of invitations to send in first batch cycle [2]

Number of days between automated batches [1]

Number of invitations to send in second batch cycle [3]

Number of invitations to send in all subsequent batch cycles [3]

Cancel   Submit

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).

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.

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 Customize link.

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 Edit 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 Edit 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 Edit link.

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.

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 (D), 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 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

- Abstract Similarity – 30% of the total score

A new Duplicate Submission Check Results 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:*

Clicking the Duplicate Submission Check Results 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 Duplicate Submission Check Results 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 Send E-mail link displays below the Publication Code (described further below).

For submissions that are in the current publication, the logged in user may see a View Submission link or a Details 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 View Submission and Details links are suppressed.

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

Duplicate Submission Check Results – Feb 12 2013 3:32PM
Submission "Applications of Graphene in Technology"

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.

Potential Duplicate Submissions

EM Duplicate 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	Flexible Touch Screens with Printed Graphene	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 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	SALLYDEV100-D-13-00015 View 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%
JANETDEV100 Send E-mail	JANETDEV100-D-10-00345	Jan 30 2013 3:42PM	2	With Editor	Experimental 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	Submitted to Journal	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%
JANETDEV100 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%

CrossCheck/iThenticate Results

Close

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.

Sample page; Publication is configured in "blinded mode":

Duplicate Submission Check Results – Feb 12 2013 3:32PM
Submission "Applications of Graphene in Technology"

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.

Potential Duplicate Submissions

EM Duplicate 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	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	[REDACTED]	[REDACTED]	57%	51%	49%
SALLYDEV100	SALLYDEV100-D-10-00230	Aug 16 2012 4:23PM	0	Submitted to Journal	[REDACTED]	[REDACTED]	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	[REDACTED]	[REDACTED]	45%	53%	53%
CAROLINEDEV100 Send E-mail	CAROLINEDEV100-D-10-00230	Jan 31 2013 4:42PM	2	Under Review	[REDACTED]	[REDACTED]	42%	51%	51%
JANETDEV100 Send E-mail	JANETDEV100-D-10-00345	Aug 23 2012 9:32AM	1	Under Review	[REDACTED]	[REDACTED]	39%	51%	26%
SALLYDEV100	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%
JANETDEV100 Send E-mail	JANETDEV100-D-10-00345	Jan 30 2013 3:42PM	2	With Editor	[REDACTED]	[REDACTED]	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	[REDACTED]	[REDACTED]	27%	51%	49%
SALLYDEV100	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%
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	[REDACTED]	[REDACTED]	15%	16%	29%
JANETDEV100 Send E-mail	JANETDEV100-D-10-00345	Jul 14 2011 11:58AM	1	Completed	[REDACTED]	[REDACTED]	15%	16%	16%
CAROLINEDEV100 Send E-mail	CAROLINEDEV100-D-13-00130	Jan 31 2013 4:42PM	2	Under Review	[REDACTED]	[REDACTED]	12%	16%	26%
JANETDEV100 Send E-mail	JANETDEV100-D-12-00245	Aug 23 2012 9:32AM	1	Under Review	[REDACTED]	[REDACTED]	13%	15%	16%

CrossCheck/iThenticate Results

Close

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

- 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.

Customize Letter - Potential Duplicate Submission

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

Cancel   Preview and Send

From:	"SALLYDEV100" <subnoske@ariessc.com>
To:	"CAROLINEDEV100" <trash1@ariessc.com
Letter 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 can be included, separated by semicolons (;).

cc:

bcc:

Letter Body: Insert Special Character   Open in New Window

Cancel   Preview and Send

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:*

File Inventory *page:*

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 Configure Duplicate Submission Check link (formerly called Set number of Days for Duplicate Submission Check).

PolicyManager Main Menu

Expand All   Collapse All

⊞ **Registration and Login Policies**
⊞ **Status Policies**
⊟ **Submission Policies**

- Edit Article Types
- Edit Submission Items
- Configure Color Codes for Companion Files
- Edit Sections/Categories
- Edit Classifications
- Set Classifications Display Policy
- Create Custom Questions
- Create Questionnaires
- Edit Co-Author Questionnaire Instructions
- Define PDF Cover Page Layouts
- Select Author's Reviewer Preferences
- Set Request Editor or Assign Editor Display Options
- Edit Manuscript Geographic Region of Origin
- Edit Manuscript Submission Instructions
- Configure Manuscript Services Icon
- Set Maximum Size of Uploaded File
- Set Other Author Parameters
- Set Revision File Selection Option
- Configure Duplicate Submission Check
- Configure Technical Check
- Configure Similarity Check
- Configure Office 2007 and Higher Support
- Configure Author Accept Checkbox

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.

Configure Duplicate Submission Check

- If the Author has submitted a new manuscript within the number of days set below, a **D** symbol will appear next to the Author's name in the Editor folders New Submissions, New Submissions Requiring Assignments, Direct-to-Editor New Submissions and New Assignments. The Editor can then click the Author's name to see information about prior submissions.
- If a manuscript 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.
  - You may highlight scores that exceed a configured threshold.
  - An overall 'EM Duplicate Score' will be calculated, based on a weighted average of the Article Title (40%), the list of Authors (30%), and the Abstract (30%).

Alert me when:

☐ The same Corresponding Author has submitted a paper in the past `30` days

☐ A similar paper has been previously 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

Cancel   Submit

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, Edit Article Types, 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).

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.

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**
⊞ **Proposals/Commentaries**
⊞ **System Conversion Tasks**
⊟ **General Searching and Viewing**

Use Editorial Details Layout [10.0 Copy of Default Editorial ▾]

☑ Search All Manuscripts
☐ Search Only Assigned Manuscripts
☑ Share Saved Searches
☑ View Linked Submission Groups
   ☑ Create/Edit Linked Submission Groups
      ☑ Set Active/Inactive Status on Linked Submission Groups
☑ View COS Scholar Universe Author Profiles
☐ Search Similar Articles in MEDLINE
☐ Search Author Publications in MEDLINE
☑ Initiate Similarity Check
☑ View Similarity Check Results
☐ View Duplicate Submission Check Results
Bibliographic Search
   ☑ AuthorMapper (with first initial at end)
   ☑ Author Mapper (LASTNAME)
☑ View Editorial Status History

Partial Page; Publisher Role Definition:

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 Define Details Page Layouts link in the 'General Policies' section. Click the Edit link for the custom layout to which you wish to add the new option, and then click the Select Items to Display link. Select/check the box next to the new 'Duplicate Submission Check' option in the "Links" section.

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

⊟ **Links**
☑ Blinded Editors *
☑ Technical Check *
☐ Additional Manuscript Details *
☐ Similarity Check *
☑ Duplicate Submission Check *
☑ Select Submissions 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 Invite Reviewers 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 Portal-wide 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.

Sample Reviewer Statistics column display:

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

- 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.

Sample Invitation Statistics column 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

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 Share People link. Click the Define People Sharing Group 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 Define Reviewer Sharing Partners 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 Solicit Commentary) or submit an invited submission for a Proposal (via Invite Authors), 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.

Sample Author Statistics column display:

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

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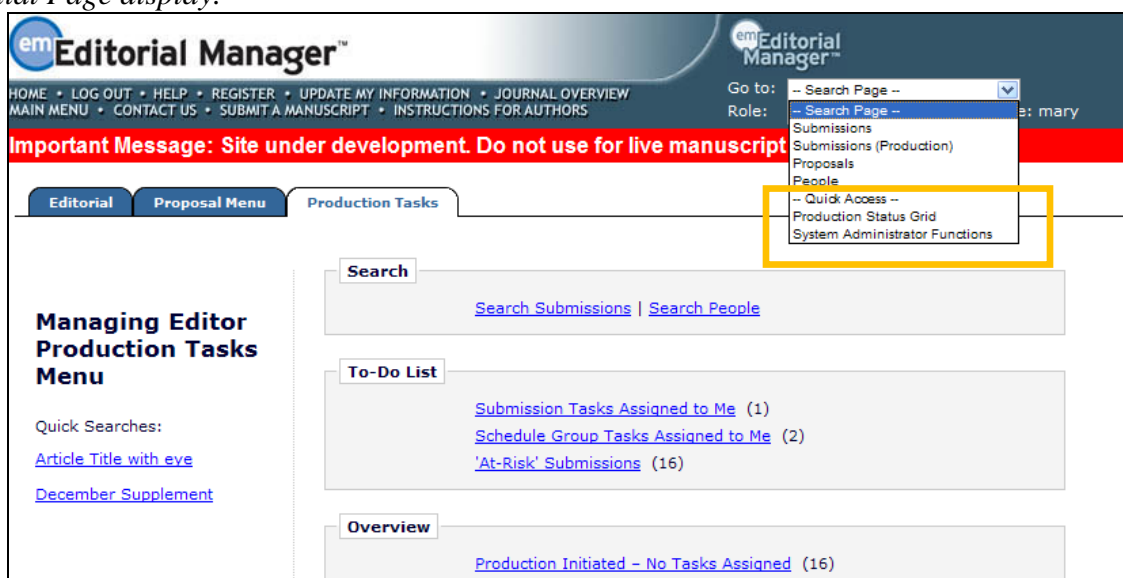
The new Quick Link displays in a section entitled 'Quick Access', and displays below the 'Search Page' section and above the 'Publication' list (for Editors configured with the Cross-Publication Login feature). For example:

> -- 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.

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.

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.

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

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

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.

Sample page; one task configured:

Batch Assign Production Task

Select the production task you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear. The table of selected submissions will confirm which submissions are valid for assignment under your choices.

Production Task: Checking Something
Task Assigned to: Please Choose a Person ▼

Submissions Selected for Assignment

Action	Manuscript Number	Author Name	Article Title	Article Type	Section/Category	Production Status	Do Not Assign
History		Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE)	Demonstration of a new feature	Betsy Article		In Production: Ready for Copyedit; [Not Copyedited]	☐
History		Simple Simon (BOSNIA AND HERZEGOVINA)	title	Original Study		In Production: Ready for Copyedit; [Not Copyedited]	☐

Back   Cancel   Proceed with Selected Task

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:

  o 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

  o 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:

o 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.

o 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:

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:*

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.

Sample page: Assignment File Grid:

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:

Batch Assign Production Task Confirmation

Mick Jagger has been assigned the production task Checking Something for the following submissions. A letter was sent:

- Manuscript Number: Unassigned. Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE): "Demonstration of a new feature"
- Manuscript Number: Unassigned. Simple Simon (BOSNIA AND HERZEGOVINA): "title"

Return to Search Results

Production Status Grid
Production Tasks Menu
Main Menu

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, Configure Submission Production Tasks, 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.

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:

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

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.

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.

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 Assign to Schedule Group Action Link or the Change Schedule Group Action Link.

From folders where the Assign to Schedule Group 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.

Assign Submission to a Schedule Group For Manuscript Number: Unassigned
Kermit the Frog (CONGO, THE DEMOCRATIC REPUBLIC OF THE): "Demonstration of a new feature"

Select the 'Add' checkbox for each new Schedule Group that you wish to add the submission to. Click the 'Proceed' button to confirm the assignments and select a desired 'Controlling' Schedule Group if necessary.

You may also enter a Submission Target Online Publication Date specific to this submission. This will be used to schedule due dates for tasks which are configured to recognize this date.

Cancel   Proceed

Current Schedule Group Assignment:	None

Submission Target Online Publication Date: ☐ (mm/dd/yyyy)

Schedule Group Description	SG Target Online Publication Date	SG Target Publication Date	Add
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	☐
Summer Issue	Jul 20 2007 12:00AM	Jul 27 2007 12:00AM	☐

Cancel   Proceed

From folders where the Change Schedule Group 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.

Assign Submission to a Schedule Group For Manuscript Number: DEMO391
Kevin M. Carlson (UNITED STATES): "Breast cancer research"

The current Schedule Group assignments are shown below. Select the 'Remove' checkbox by a current assignment to remove the submission from that Schedule Group on proceeding.

Select the 'Add' checkbox for each new Schedule Group that you wish to add the submission to. Click the 'Proceed' button to confirm the assignments and select a desired 'Controlling' Schedule Group if necessary.

You may also enter a Submission Target Online Publication Date specific to this submission. This will be used to schedule due dates for tasks which are configured to recognize this date.

Cancel   Proceed

		Status	Remove
Current Schedule Group Assignment:	Spring Issue	Open	☐

Submission Target Online Publication Date:	04/23/2007 (mm/dd/yyyy)

Schedule Group Description	SG Target Online Publication Date	SG Target Publication Date	Add
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	☐
Summer Issue	Jul 20 2007 12:00AM	Jul 27 2007 12:00AM	☐

Cancel   Proceed

Whether accessed via the Assign to Schedule Group Action Link or the Change Schedule Group 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.

Confirm Controlling Schedule Group for Submission: DEMO391
Kevin M. Carlson (UNITED STATES): "Breast cancer research"

When a Submission is assigned to multiple Schedule Groups, one of those groups must be designated as the 'Controlling Group' for that submission. The Submission's Controlling Group is used when determining Submission Production Task Due Dates and when copying Target Dates to Actual Dates. The Submission's Target Number of Pages is also synchronised with the value from the Controlling Group.

Where 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
⦿	Spring Issue 🔑	Open	Apr 23 2007 12:00AM	Apr 30 2007 12:00AM
○	Spring 2014: German	Open	Mar 04 2014 12:00AM	Mar 31 2014 12:00AM

Cancel   Proceed

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

Return to Production Initiated - No Tasks Assigned

Production Tasks Menu

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 Close Schedule Group 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 Change Controlling Group 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.

Partial Details *sample page displayed:*

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.

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
⊞ Proposals/Commentaries
⊞ General Searching and Viewing
⊞ Edit Submission
⊞ Discussion Forums
⊞ Transmittal Form
⊞ Sending E-mail
⊞ Viewing and Editing People Data
⊞ Flag Icons
⊞ Proxy Activities
⊞ 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
☑ View Schedule Groups
☑ Manage Schedule Groups
  ☐ Assign Submissions to Multiple Schedule Groups
  ☐ Copy Contents when Copying a Group
☑ Edit Submission Target Online Publication Date
☑ View Production Details
  Use Production Details Layout   `Production Fields Layout`
☑ View Production Status Grid
☑ View At-Risk Submissions
☑ View All Submissions in Production
☑ End Production/Return to Production
☑ Assign Submission Production Task
☑ Assign Schedule Group 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:

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 Copy Group 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 Copy Group 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:

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 Copy Group 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

Please confirm the information to copy when creating the new Schedule Group. When copying TOC Header entries, a new, independent copy of each Header is created in the new group.

- ● Copy Schedule Group Metadata only
- ○ Copy Schedule Group Table of Contents only
- ○ Copy Metadata plus Table of Contents

Cancel   Proceed

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:

Copy Schedule Group: Confirm Data to Copy

Please confirm the information to copy when creating the new Schedule Group. When copying TOC entries, new Submissions are not created; instead, the existing Submissions are initially assigned to both the original and copy. For TOC Header entries, a new, independent copy of each Header is created in the new group.

- ● Copy Schedule Group Metadata only
- ○ Copy Schedule Group Table of Contents only
- ○ Copy Metadata plus Table of Contents

Cancel   Proceed

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 Remove from Group link in the Action column.

Partial page displayed; Copied TOC:

Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	Article Title	Section/Category	Submission Target Online Date	Submission Actual Online Date	Black and White Image Count	Color Image Count
Remove from Group	1		Original Study	Anthony Author, MD	0			Copyedit Underway; [Press Release Submitted]; Author Review of Proofs Underway	This is a training for JADA				0	0
Remove from Group	2		Original Study	Anthony Author, MD	0			Page Layout Underway	Royal society Primer				0	0
Remove from Group	3		Original Study	Kevin M. Carlson	0			Page Layout Underway	This is a demo for Haworth Press			Jun 25 2004 12:00AM	0	0
Remove from Group	4		Special Comments	Mary François Smith, PhD	0			Page Layout Underway	Test 1.2		May 31 2007 12:00AM		0	0
Remove Header	5		Alison is Testing		0									

[Update TOC] [Insert Header]

[Submit] [Cancel] [Submit and Add Submissions to Group]

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**
⊞ **Proposals/Commentaries**
⊞ **General Searching and Viewing**
⊞ **Edit Submission**
⊞ **Discussion Forums**
⊞ **Transmittal Form**
⊞ **Sending E-mail**
⊞ **Viewing and Editing People Data**
⊞ **Flag Icons**
⊞ **Proxy Activities**
⊞ **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
☑ View Schedule Groups
☑ Manage Schedule Groups
   ☐ Assign Submissions to Multiple Schedule Groups
   ☐ Copy Contents when Copying a Group
☑ Edit Submission Target Online Publication Date
☑ View Production Details
   Use Production Details Layout `Production Fields Layout ▾`
☑ View Production Status Grid
☑ View At-Risk Submissions
☑ View All Submissions in Production
☑ End Production/Return to Production
☑ Assign Submission Production Task
☑ Assign Schedule Group Production Task
☑ Cancel Production Task Assignment

Sample Publisher Role Manager page:

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".

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 Select Fields for Import 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.

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:*

[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.

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.

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.

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
- ☐ Manuscript Number
- ☐ Revision Number
- ☐ Unique Document ID
- ☐ DOI

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 <u>Log in to Required Reviews 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.}

- 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.
    http://DEEP_LINK

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

    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 Set Editor Deep Link Policy 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
☐ Expire link after ___ days

%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, Edit Letters, 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%**

- **%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.

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, Edit Letters, and Edit an existing letter, or add a new letter. Add the new merge field as desired.