CONFIDENTIAL AND PROPRIETARY

Release Notification

Editorial Manager®

ProduXion Manager®

Commerce Manager™

Editorial Manager/ProduXion Manager
11.2 General Release Notification
01/06/2015
Draft – Subject to Change

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Document Change Log

Date	Version	Change
09/22/2014	Beta Release	Beta version
10/30/2014	Gamma Release	Gamma version *Updated ‘PRE’ references
01/06/2015	General Release	General Release version

Editorial Manager/ProduXion Manager 11.2 General Release Notification

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GENERAL ENHANCEMENTS

Reviewer Selection Summary Page Enhancements

In EM version 11.1, users access the 'Reviewer Selection Summary' page by clicking the 'Invite Reviewer' action link for a particular submission.

In EM version 11.2, the 'Reviewer Selection Summary' page is enhanced for convenience, allowing different functions of the page to be customized or restricted depending on publication configuration. Customized Reviewer Instructions may be added and Reviewer Search Options and criteria may be restricted in Editor *RoleManager.* Submission information and Quick Action Links are moved to left sidebar menu. The Review Status Date is added below the 'Review Status' in the 'Selected Reviewers' section of the page.

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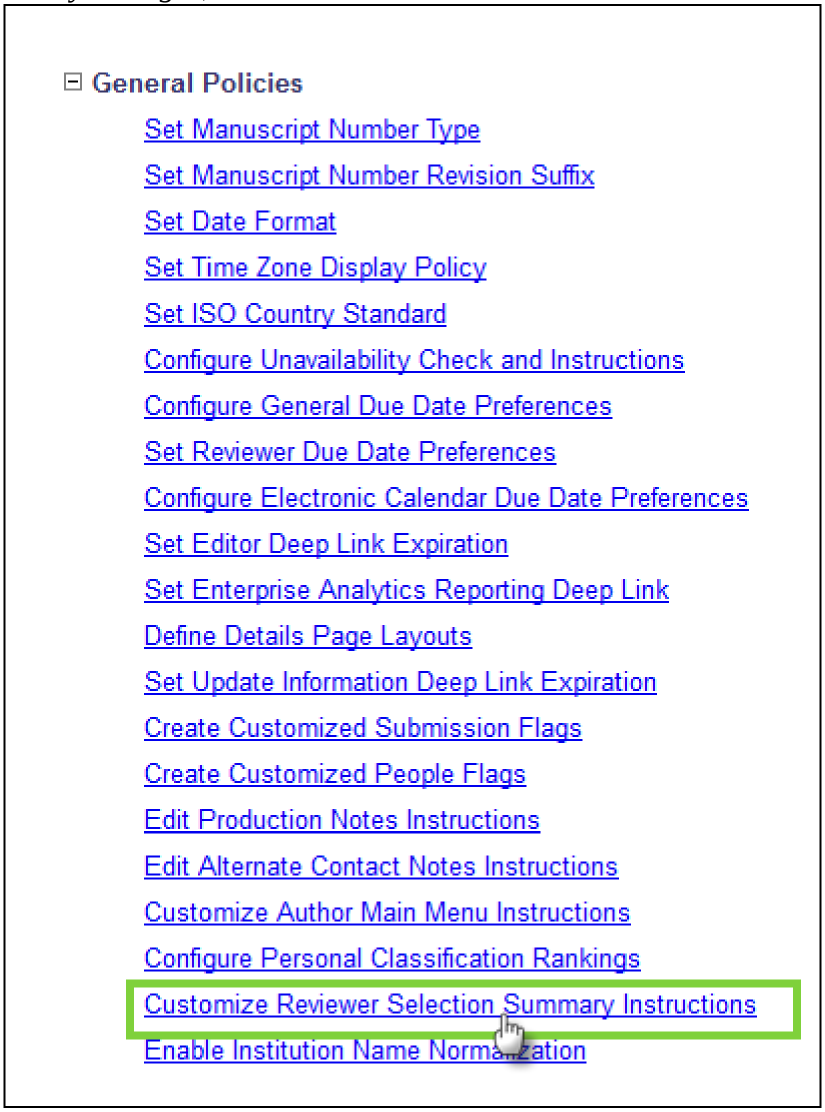
Sample Reviewer Selection Summary *page – links have been moved to a left sidebar, 'Review Settings' have been moved below the 'Reviewer Search' section, and Customized Instructions appear at the top of the page*

NOTE: The links in the 'View Submission Information' and 'Quick Action Links' sections of the left sidebar are dependent on Editor permissions, so Editors without appropriate permission will not see the corresponding link.

TO CONFIGURE CUSTOMIZED INSTRUCTIONS: In the ‘General Policies’ section of *PolicyManager*, click the ‘Customize Reviewer Selection Summary Instructions’ link:



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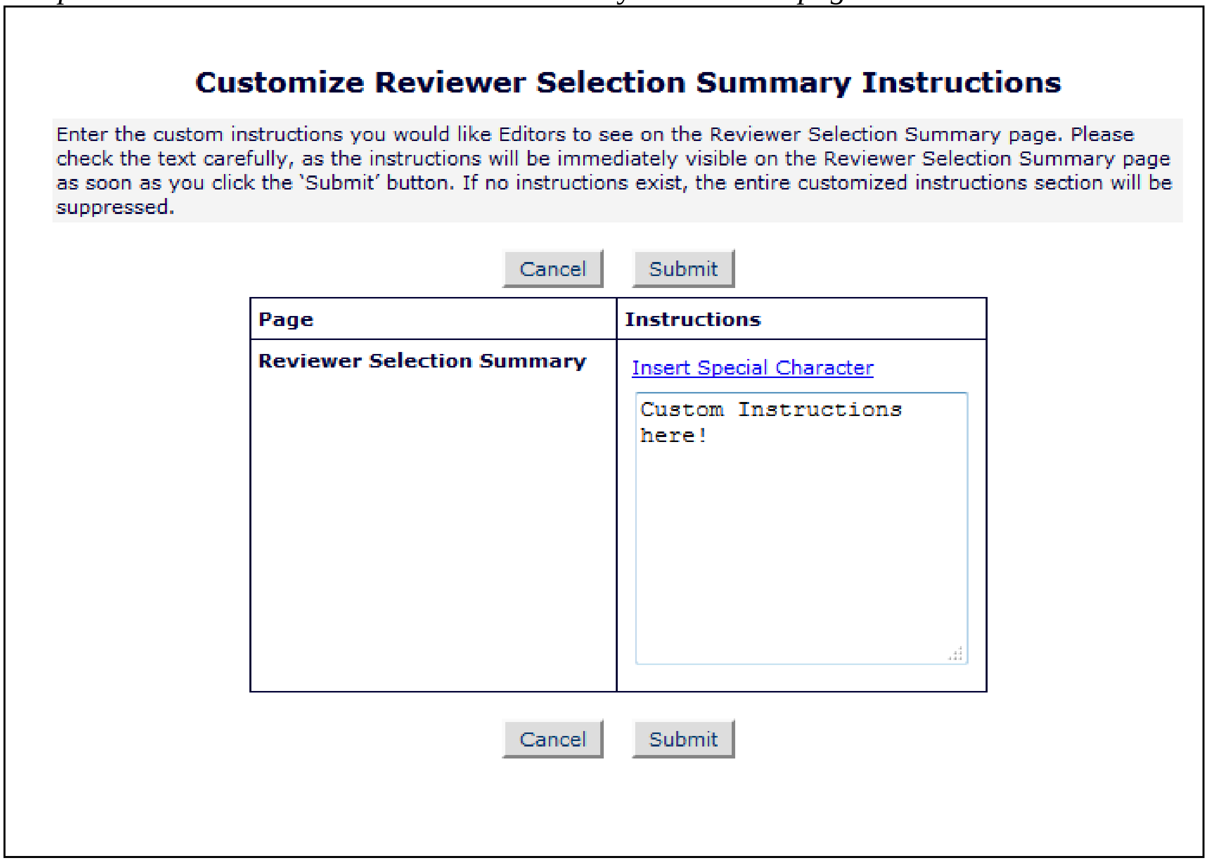
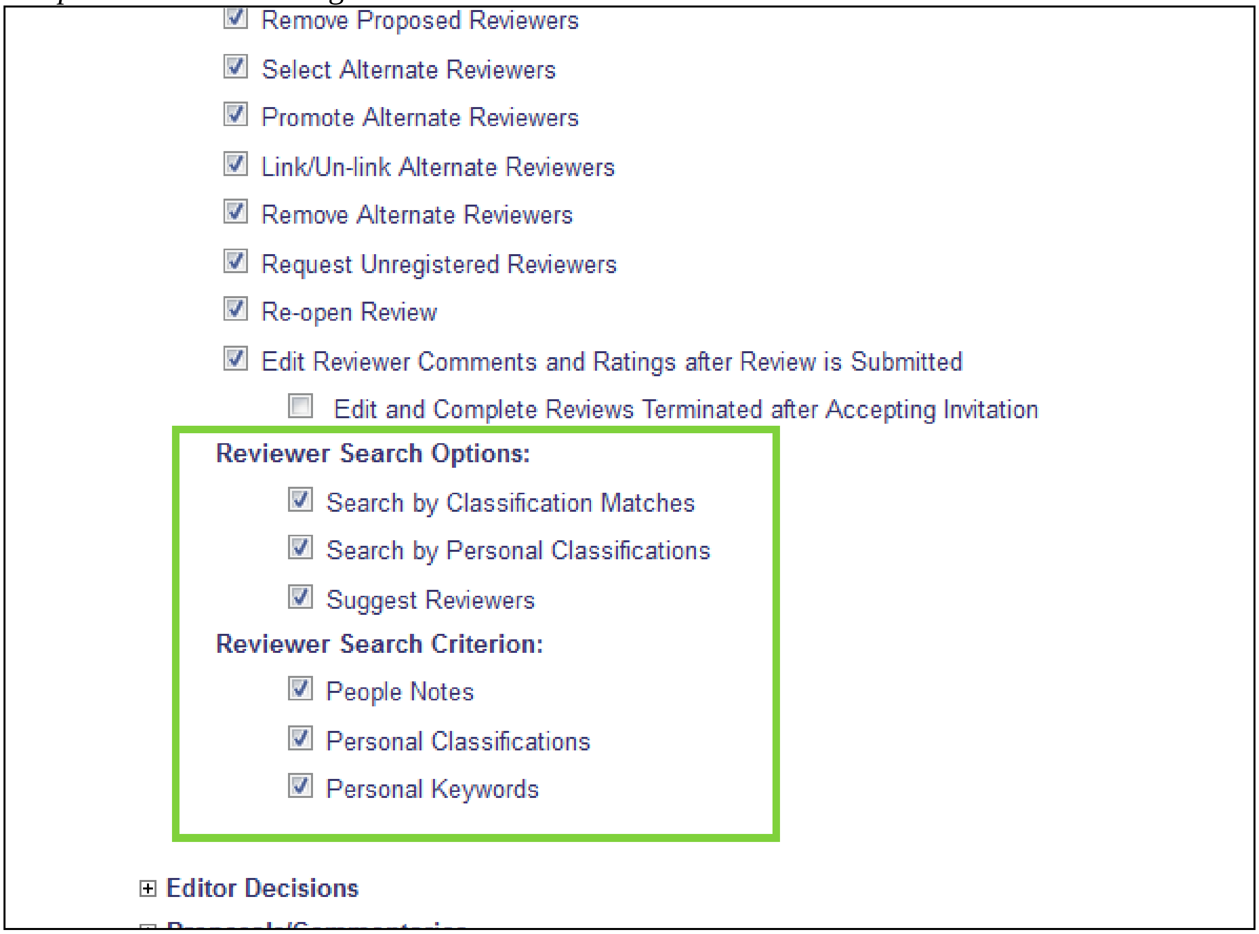
Sample Customize Reviewer Selection Summary Instructions *page*



On the 'Customize Reviewer Selection Summary Instructions' page, enter the desire text and click 'Submit'. The instructions will now be visible at the top of the 'Reviewer Selection Summary' page.

TO CONFIGURE RESTRICTED SEARCH OPTIONS AND CRITERIA: In Editor *Rolemanager*, Add or Edit any existing Editor Role. Scroll to the 'Reviewer Invitations' portion of the page. Two new sections are added: 'Reviewer Search Options' and 'Reviewer Search Criterion'. At upgrade, all options are selected.

Sample Editor RoleManager.



De-selecting 'Search by Classification Matches', 'Search by Personal Classifications', or 'Suggest Reviewers' removes those options from the Reviewer Search drop down list on the 'Reviewer Selection Summary page.

De-selecting 'People Notes' removes that option from the Search Criterion drop down list. Once de-selected, People Notes will not display in the Search Results Grid or on the People Information page accessed by clicking a Reviewer's name in the Results Grid or on the Reviewer Selection Summary page.

De-selecting 'Personal Classifications' removes that option from the Search Criterion drop down list.

De-selecting 'Personal Keywords' removes that option from the Search Criterion drown down list. Once de-selected, Personal Keywords will also be suppressed on the People Information page accessed by clicking a Reviewer's name in the Results Grid or on the Reviewer Selection Summary page.

If 'Search by Classification Matches', 'Search by Personal Classifications', and 'Personal Classifications' are all de-selected, the Classification column will not display in the Search

Results Grid. Additionally, the ‘Classifications’ section of ‘My Reviewer Display Preferences’ will also be suppressed.

If ‘Search by Personal Classifications’ and ‘Personal Classifications’ are de-selected, the ‘Personal Classifications’ section of the People Information page is suppressed.

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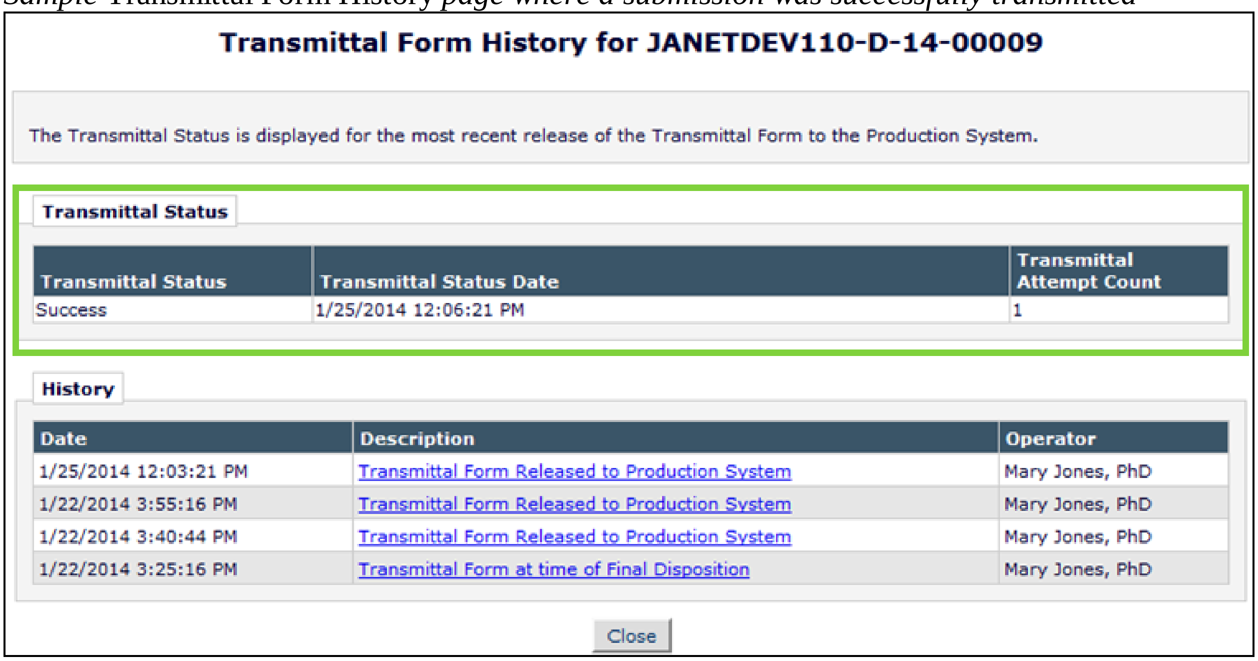
Enhanced Transmittal Status Visibility

In EM/PM version 11.1, publications have the option to transmit submissions via FTP after a Final Disposition of Accept has been set. If the transmittal does not successfully reach its destination, an error e-mail is sent to an administrator.

In EM/PM version 11.2, more visibility is offered in the user interface that will make it easier for publications to track transmittals after the Final Disposition has been set. Transmittal tracking statuses and timestamps are now available for display on the *Transmittal Form History* page and in the *Accepted* Submissions folder on the Publisher Main Menu. A new 'Unsent, Pending or Failed Transmittals' folder is added to the Editor Main Menu and allows Editors to efficiently track Transmittals in one location.

Once Final Disposition has been set and the Transmittal initiated, the Transmittal Form History page - accessed by clicking the "Transmittal Form History" link on the *Transmittal Form* page – will update to show the Transmittal Status ('Not Sent', 'Success', 'Pending', 'Failed'), the timestamp of the Transmittal Status, and the Transmittal Attempt Count. Failed Transmittals will display a "Failed" hyperlink in the Transmittal Status column. Clicking the link will display the Transmittal error information in a pop-up warning.

Sample Transmittal Form History *page where a submission was successfully transmitted*



Transmittal Form History for JANETDEV110-D-14-00009

The Transmittal Status is displayed for the most recent release of the Transmittal Form to the Production System.

Transmittal Status

Transmittal Status	Transmittal Status Date	Transmittal Attempt Count
Success	1/25/2014 12:06:21 PM	1

History

Date	Description	Operator
1/25/2014 12:03:21 PM	Transmittal Form Released to Production System	Mary Jones, PhD
1/22/2014 3:55:16 PM	Transmittal Form Released to Production System	Mary Jones, PhD
1/22/2014 3:40:44 PM	Transmittal Form Released to Production System	Mary Jones, PhD
1/22/2014 3:25:16 PM	Transmittal Form at time of Final Disposition	Mary Jones, PhD

Close

A new 'Unsent, Pending or Failed Transmittals' folder on the Editor Main Menu will also display similar status information. The Manuscript Number, Article Title, Final Disposition Date, Transmittal Status ('Not Sent', 'Success', 'Pending', 'Failed'), Transmittal Status Date, and Transmittal Attempt Count are shown for all submissions scheduled for Transmittal. A failed Transmittal will display a 'Failed' hyperlink that will open a pop-up warning displaying the Transmittal error information.

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Sample Unsent, Pending or Failed Transmittals *folder*

Unsent, Pending or Failed Transmittals

Contents: All Submissions scheduled to be transmitted to an external Production System that were not sent, or are pending (in process), or failed to be transmitted. If you have permission, you may release a submission that is not currently pending by using the 'Transmittal Form' link.

Page: 1 of 1 (3 total submissions) Display 10 results per page.

Action	Manuscript Number	Article Title	Final Disposition Date	Transmittal Status	Transmittal Status Date	Transmittal Attempt Count
View Submission Details Transmittal Form Send E-mail	JANETDEV110-D-14-00019	Baseball Mud Rub	Jan 30 2014 3:21PM	Not Sent	Jan 30 2014 3:21PM	0
View Submission Details Transmittal Form Send E-mail	JANETDEV110-D-14-00012	A Third Van Allen Radiation Belt	Jan 29 2014 10:25PM	Pending	Jan 29 2014 10:30PM	0
View Submission Details Transmittal Form Send E-mail	JANETDEV110-D-14-00008	The Largest Galaxy	Jan 29 2014 12:21PM	Failed	Jan 29 2014 2:58PM	6
View Submission Details Transmittal Form Send E-mail Details Transmittal Form Send E-mail	JANETDEV110-D-14-00007	Super Large Neurons	Jan 26 2014 3:21PM	Failed	Jan 28 2014 1:55PM	6

Page: 1 of 1 (3 total submissions) Display 10 results per page.

Editor Main Menu

You should use the free Adobe Reader 10 or later for best PDF Viewing results.

Get Adobe Acrobat Reader

Publisher Roles may also have access to Transmittal Status information on their Main Menu in the *Accepted Submissions* folder. Transmittal Status, Transmittal Status Date, and Transmittal Attempt Count columns are added to the existing *Accepted Submissions* grid.

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Sample Accepted Submissions *folder on the Publisher Main Menu*

Accepted Submissions

Listed below are any submissions with an Accepted Final Disposition. They may be sorted by clicking the arrows under the column headings.

Page: 1 of 1 (8 total submissions) Display 10 results per page.

Action	DOI	Manuscript Number	Author Name	Article Title	Article Type	Volume Number	Issue Number	Date of Final Disposition	Final Disposition	Transmittal Status	Transmittal Status Date	Transmittal Attempt Count
Action Links		JANETDEV110-D-14-00009	June Austen, PhD	A Third Van Allen Radiation Belt	Original Study			Jan 24 2014 3:21PM	Accepted	Pending	Jan 24 2014 3:26PM	0
Action Links		JANETDEV110-D-14-00008	Maney Moses	The Tiniest Galaxy	Original Study			Jan 22 2014 2:58PM	Accepted	Failed	Jan 24 2014 8:00AM	6
Action Links		JANETDEV110-D-14-00007	Finbarr O'Reilly, PhD	Tiny Neurons	Original Study			Jan 17 2014 1:55PM	Accepted	Not Sent	Jan 17 2014 2:21PM	0
Action Links		JANETDEV110-D-14-00007	Samantha Kerber, PhD	Mars Topography	Original Study			Jan 6 2014 1:55PM	Accepted	Success	Jan 6 2014 1:21PM	1
Action Links		JANETDEV110-D-13-00348	Xander Sylvan	Conference Submission for Dogwoods 2014	Conference Submission			Jan 4 2014 10:08AM	Accept and Transmit	Success	Aug 4 2014 11:00AM	1
Action Links		JANETDEV110-D-13-00348	Bonnie Bruce	Quadcopters	Original Study			Jan 3 2014 8:08AM	Accepted			
Action Links		JANETDEV110-D-13-00348	Eleanor Hemmick	Conference Submission for Kudzu 2014	Conference Submission			Jan 2 2014 10:58PM	Accept for Extraction			

Page: 1 of 1 (8 total submissions) Display 10 results per page.

Publisher Main Menu

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TO CONFIGURE: No configuration necessary if a Transmittal Method is set for the publication.

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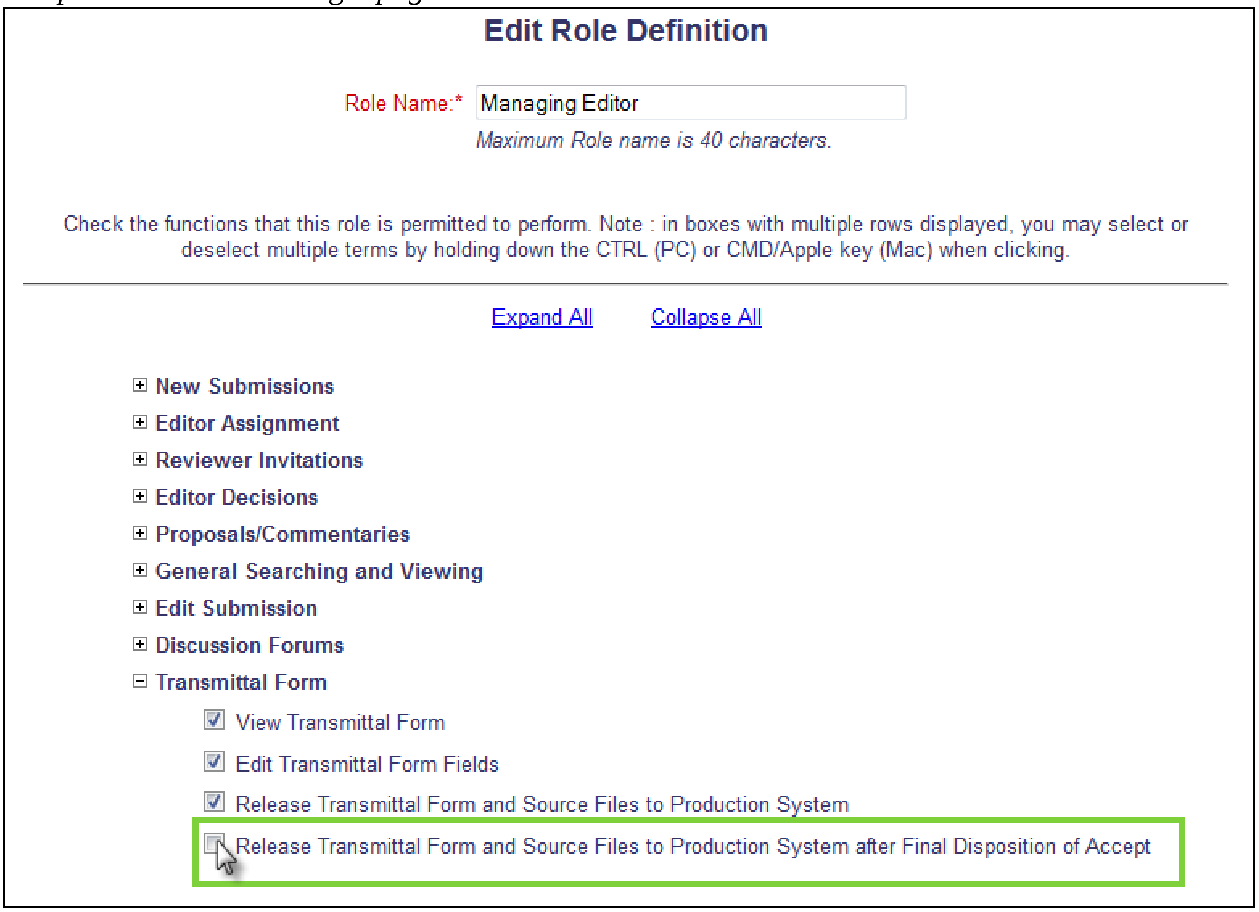
Re-Release Transmittal After Final Disposition: Editor Roles

In EM/PM version 11.1, only Publisher Roles may re-release Transmittals if necessary.

In EM/PM version 11.2, Editors will have the option to re-release a Transmittal after a Final Disposition of Accept. A new ‘Release Transmittal Form and Source Files to Production System after Final Disposition of Accept’ permission is added to Editor *RoleManager*. Once enabled, Editors will be able to re-release Transmittals from the *Transmittal Form* page.

Sample Editor RoleManager *page*



TO CONFIGURE: In Editor *RoleManager*, add or edit any existing Role. In the ‘Transmittal Form’ section, select the ‘Release Transmittal Form and Source Files to Production after Final Disposition of Accept’ permission.

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Attach Files Summary Enhancement

In EM version 11.1, the summary following the ‘Attach Files’ step in the Author Submission interface does not efficiently convey pertinent submission information to submitting Authors.

In EM version 11.2, the summary is enhanced as follows:

- Submission Item names in the grid are now displayed in red only if the associated item is missing
- When a single Submission Item is not configured to allow Offline Submission, the associated cell in the ‘Offline’ column is in grey.
- If all Submission Items for the Article Type are configured to not allow Offline Submission, the ‘Offline’ columns are suppressed
- Repeated information is consolidated and the error messages are shortened to make it easier for the user to find the parts of the submission that may need attention
- The step associated with the missing information is rendered in bold as part of the warning and is a link back to the submission step.
- The order of the messages is changed to correspond to the order of the submission steps.

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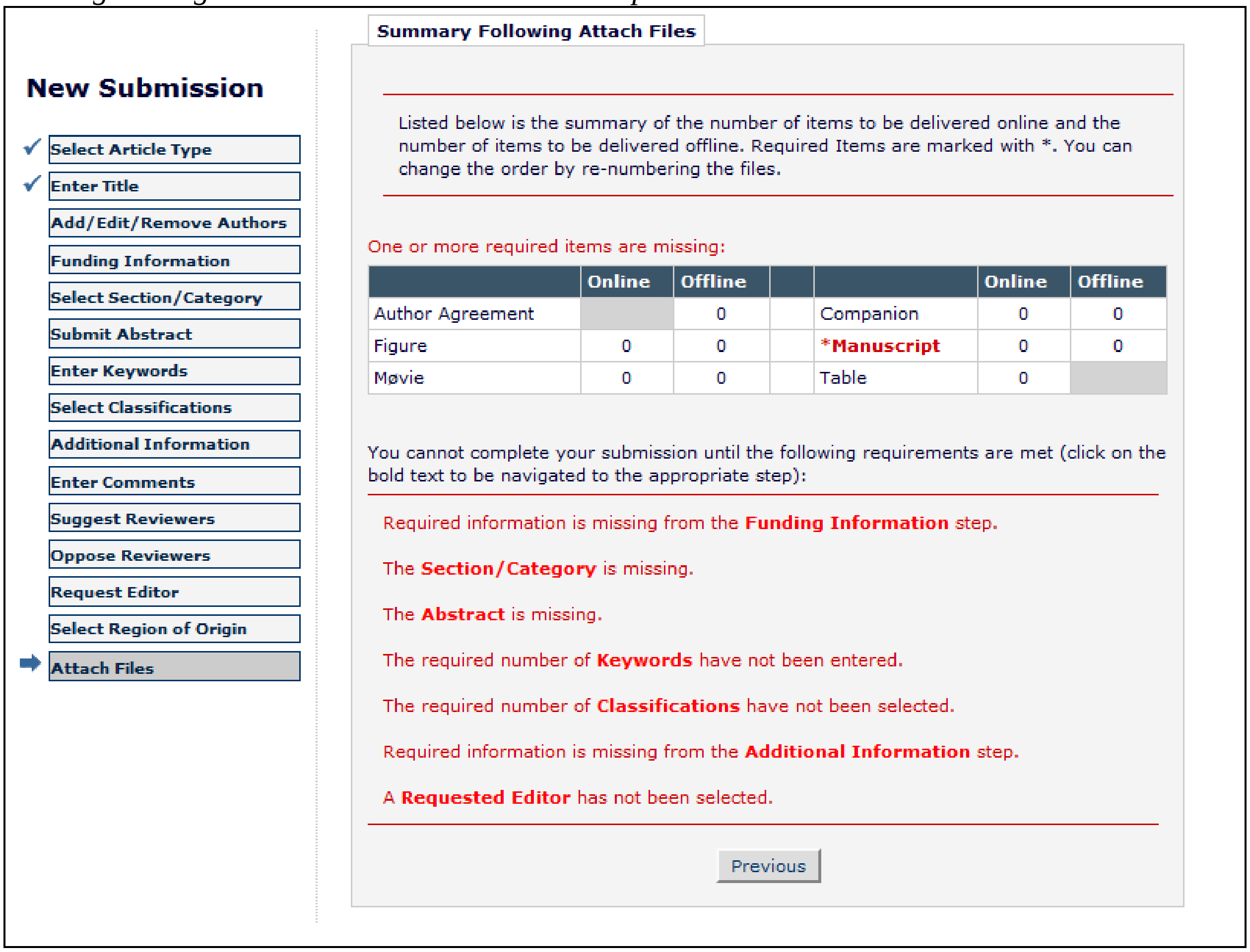
Sample Summary Following Attach Files *page – the bold, red text of the submission steps in the warning messages link back to the submission step*



Summary Following Attach Files

New Submission

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- Funding Information
- Select Section/Category
- Submit Abstract
- Enter Keywords
- Select Classifications
- Additional Information
- Enter Comments
- Suggest Reviewers
- Oppose Reviewers
- Request Editor
- Select Region of Origin
- Attach Files

Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required Items are marked with *. You can change the order by re-numbering the files.

One or more required items are missing:

	Online	Offline			Online	Offline
Author Agreement		0		Companion	0	0
Figure	0	0		***Manuscript**	0	0
Movie	0	0		Table	0	

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

Required information is missing from the **Funding Information** step.

The **Section/Category** is missing.

The **Abstract** is missing.

The required number of **Keywords** have not been entered.

The required number of **Classifications** have not been selected.

Required information is missing from the **Additional Information** step.

A **Requested Editor** has not been selected.

Previous

TO CONFIGURE: No configuration necessary.

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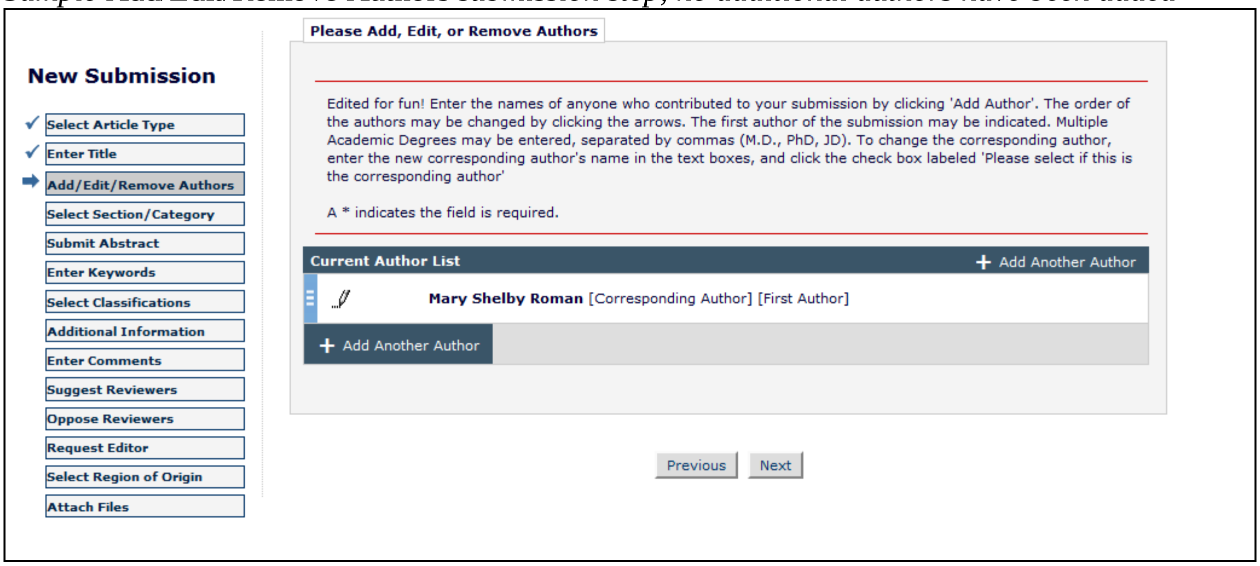
Add/Edit/Remove Authors Display Enhancement

In EM version 11.1, authors may be added to a submission on the Add/Edit/Remove Authors submission step by clicking an 'Add Author' button and completing information in the resulting pop-up window.

New in EM version 11.2, the Add/Edit/Remove Authors submission step is enhanced for more intuitive experience.

Sample Add/Edit/Remove Authors *submission step, no additional authors have been added*



Clicking the '+ Add Another Author' button within the grid will still bring the user to a secondary display where more information about the new Author may be added.

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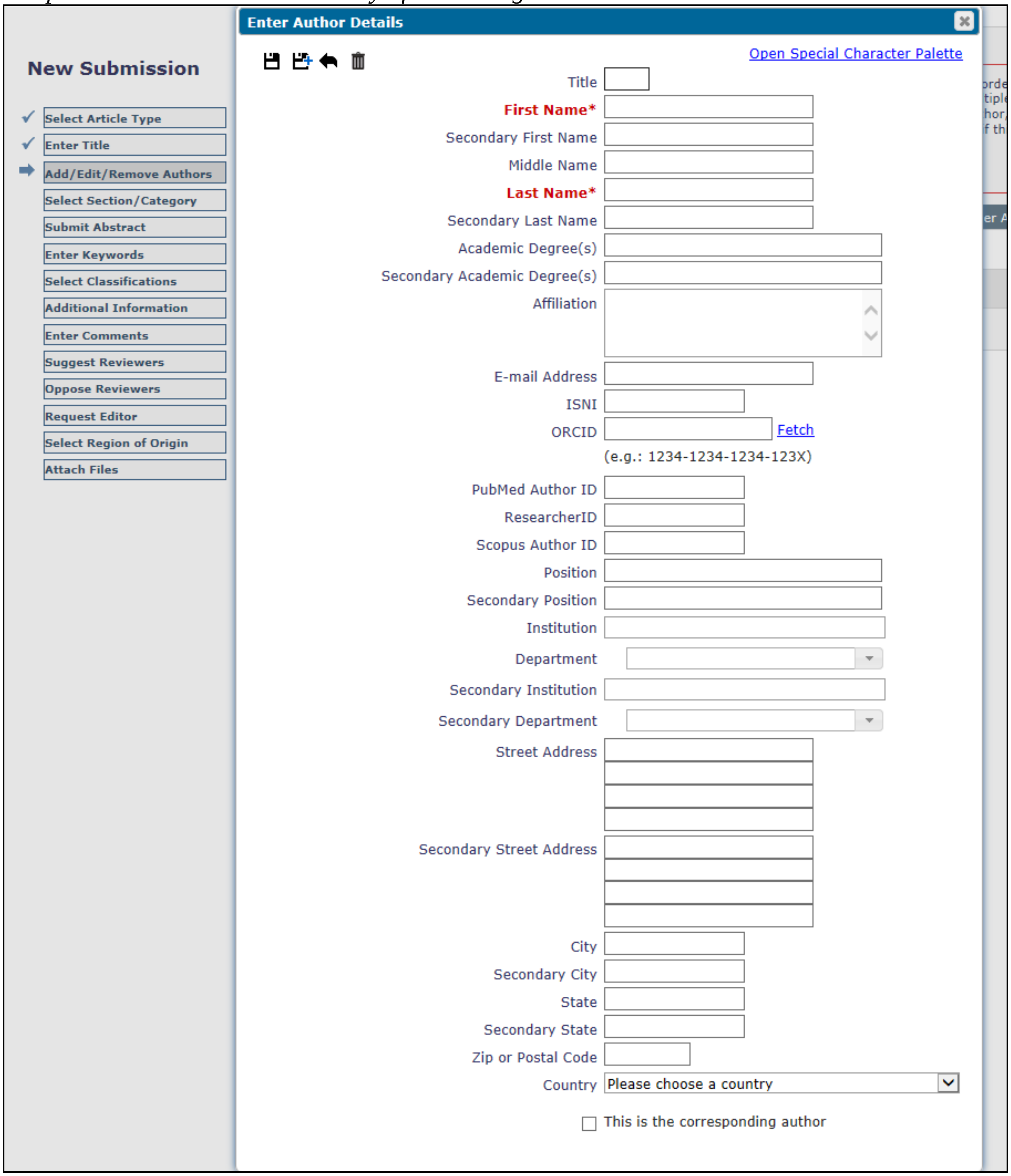
Sample Enter Author Details *overlay after clicking the '+ Add Another Author' button*



In the 'Enter Author Details' overlay, buttons are replaced by icons in the upper left corner:

- - The disk icon will save and close the 'Enter Author Details' overlay
- - The disk '+' icon will save the current Author being entered and open a new 'Enter Author Details' overlay so the user may add another author

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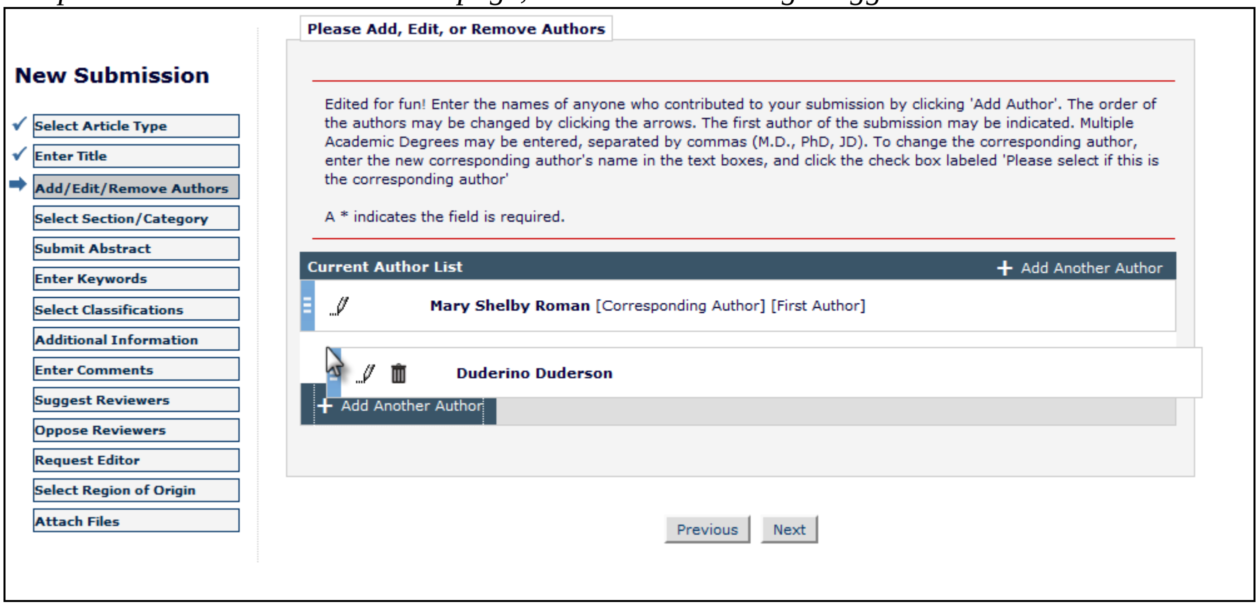
- The arrow button will cancel and close the page without saving any information entered in the session
- The trash can icon will remove the author.

Newly added Authors will display below the Corresponding Author in the grid. Clicking the pencil icon ( ) allows the user to edit information about the Author. The trash can icon in the grid will remove the author from the submission. The order of the Authors in the grid may be rearranged by dragging and dropping the Author's row to the desired location in the list.

Sample Add/Edit/Remove Authors *page, a co-Author is being dragged*



TO CONFIGURE: No configuration necessary. However, if the instructions for this submission step were customized, publications may wish to re-evaluate the text to reflect the newer interface.

Questionnaire Policies

In EM/PM version 11.1, links to Custom Question configuration may be found in the 'Submission Policies' section of *PolicyManager.*

In EM/PM version 11.2, all links associated Custom Question configuration ('Create Custom Questions', 'Create Questionnaires', and 'Edit Co-Author Questionnaire Instructions') have been moved to a new section in *PolicyManager*, 'Questionnaire Policies'. The functionality of the links remains the same.

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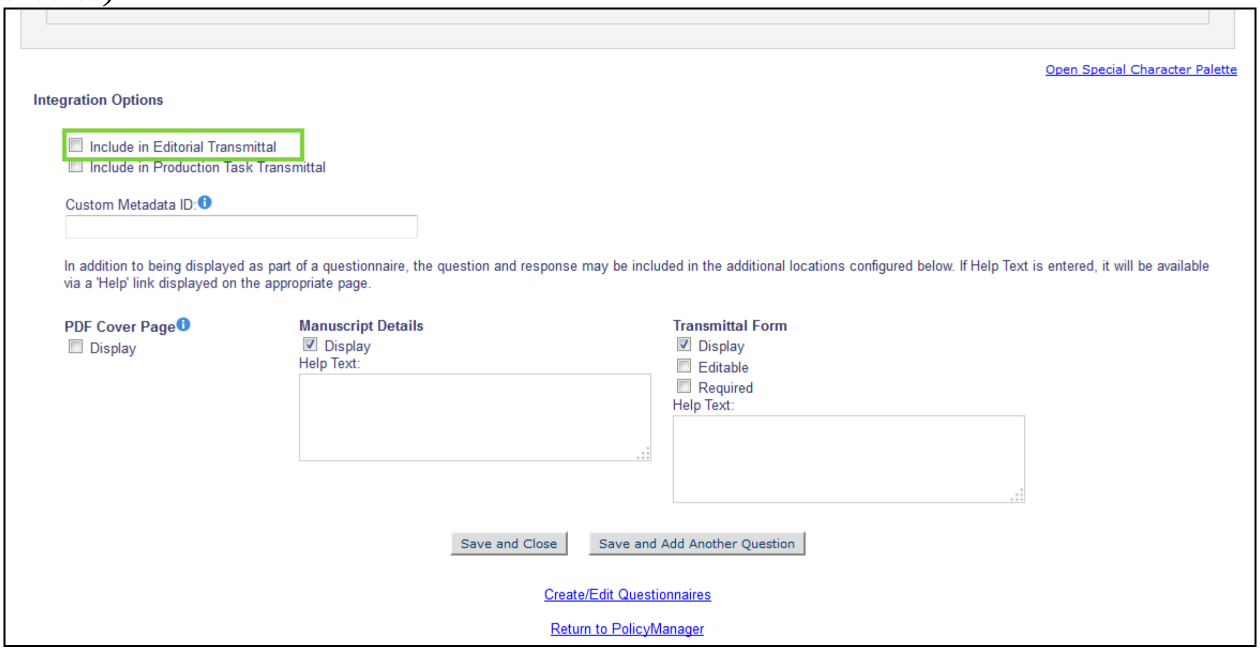
Custom Questions Included in Editorial Transmittal

In EM/PM version 11.1, a Custom Question and the Author's response may be included in an Editorial Transmittal (depending on the publication's Transmittal Method) by selecting any of the three 'Transmittal Form' options on the 'Add/Edit Custom Question' page ('Display', 'Editable', and/or 'Required').

In EM/PM version 11.2, administrators must select a new 'Include in Editorial Transmittal' checkbox in the 'Integration Options' section of the 'Add/Edit Custom Questions' page. At upgrade, this checkbox should already be selected for existing questions that have any of the Transmittal Form options selected.

Sample Add/Edit Custom Question *page (this publication also has Production Tracking enabled)*



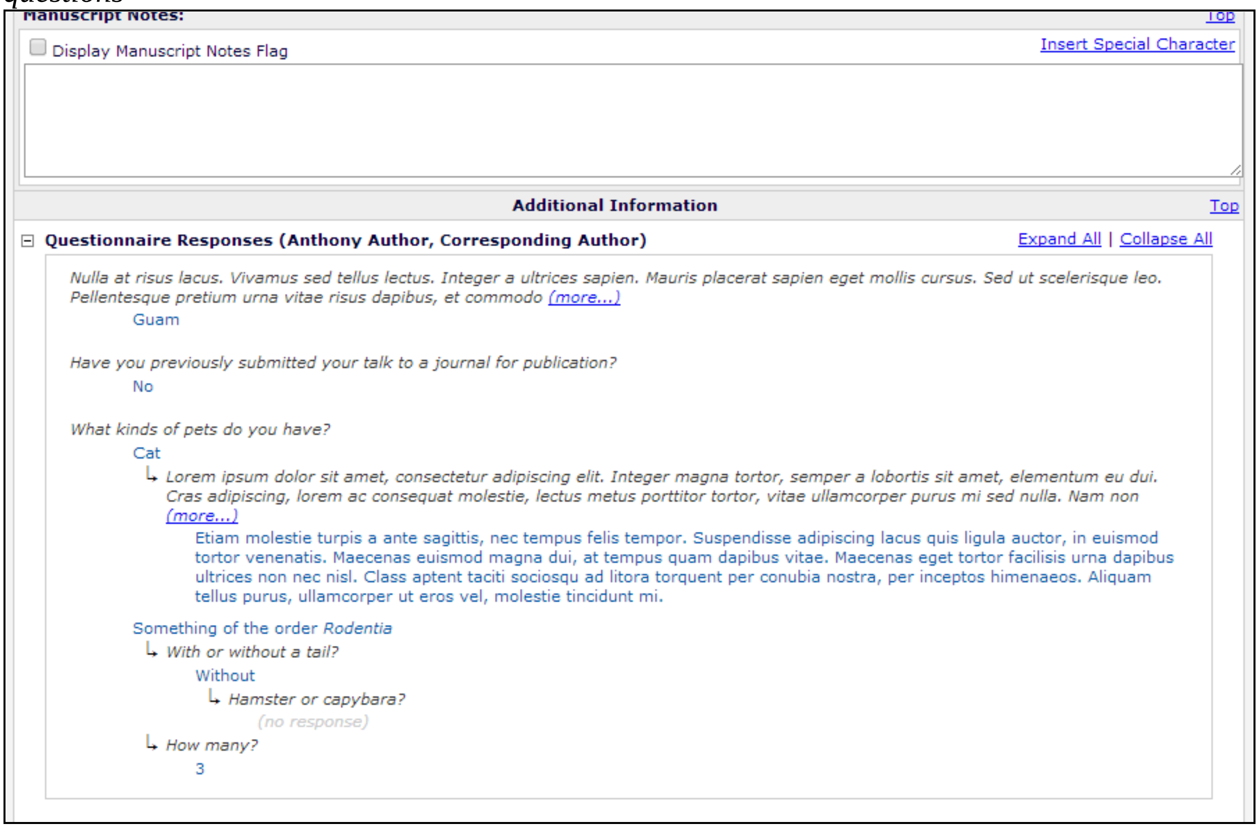
TO CONFIGURE: At upgrade, no configuration is necessary for existing questions. For all newly created questions after upgrade, the 'Include in Editorial Transmittal' option must be enabled to add Custom Question information to a transmittal.

Enhanced Questionnaire Responses Display

In EM/PM version 11.1, Custom Questions and Responses are displayed on the *Details* page in a similar grid format as the rest of the page. This may make some of the multi-level question responses hard to read.

New in EM/PM version 11.2, Custom Questionnaire responses are displayed in a more streamlined format. Lengthy questions are displayed with '(more…)' links to expand or '(less…)' links to collapse, while the responses are always displayed in full. Additionally, multi-part questions are displayed with helpful arrows to different levels directing the user to follow-on responses.

Sample Additional Information *section of the* Details *page showing the display of multi-part questions*



TO CONFIGURE: No configuration necessary, the display is enhanced for existing *Details* pages upon upgrade.

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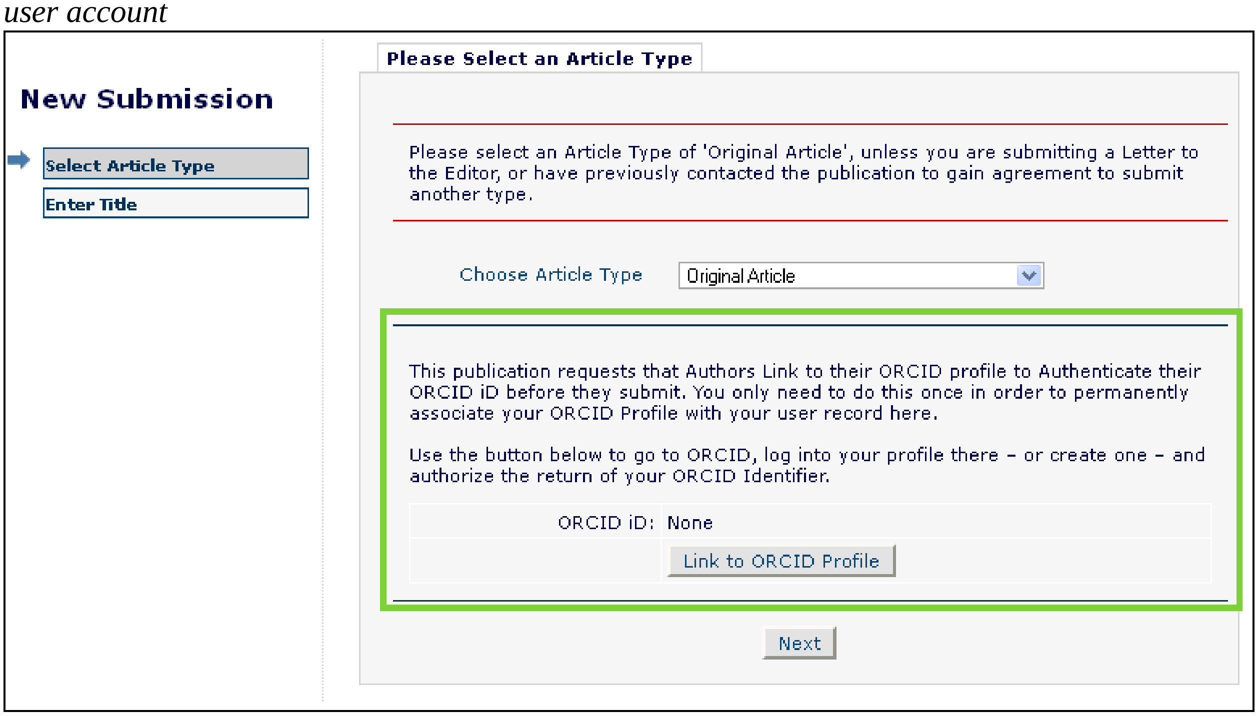
Enhanced ORCID iD Authentication for Authors and Co-Authors

In EM/PM version 11.1, there are five personal identifier fields that may be configured for use as Registration Fields, and as Other Author Information fields. The ORCID Identifier field allows users to retrieve their ORCID iD from ORCID.org which then returns it to EM marked as 'Authenticated'. Currently, ORCID iDs may be Authenticated by users when self-registering or while accessing their 'Update My Information' page. Corresponding Authors may provide ORCID iDs for any co-Authors during the submission process, but may only 'Fetch' iDs from existing ORCID profiles. The ORCID iDs provided by a Corresponding Author for any co-Authors are not Authenticated, though co-Authors may later Authenticate their iD when verifying co-Authorship and registering within Editorial Manager.

In EM version 11.2, two new Article Type configurations are introduced to prompt Authors of a submission to associate their ORCID iD with their EM user accounts (or register, if the Author currently does not have an ORCID iD).

An 'Identifier Request' step may be added to the new submission process. After a Corresponding Author has selected an Article Type with the new configuration, a check for an Authenticated ORCID iD is performed on the Corresponding Author's user record. If the Corresponding Author has a previously Authenticated ORCID iD, EM displays the user's ORCID iD for confirmation with an ORCID icon (iD) before proceeding to the 'Enter Title' submission step. If the Corresponding Author has not yet linked an Authenticated ORCID iD with their user account, a 'Link to ORCID Profile' button is displayed that sends the Author to ORCID.org for confirmation.

Sample New Submission *interface – Corresponding Author has not linked an ORCID iD to his user account*



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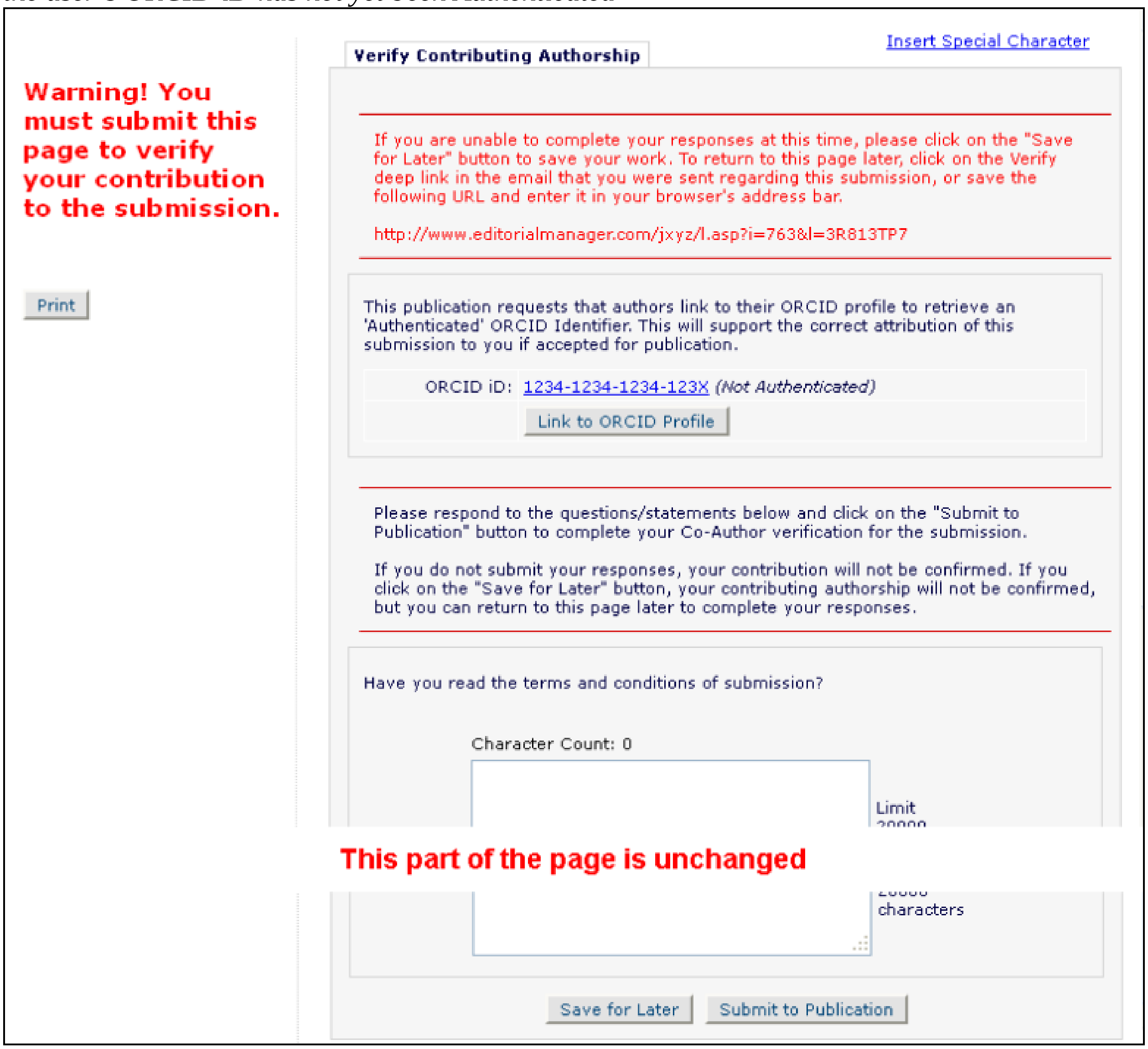
ORCID Authentication may also be added to the co-Author verification process. If the Article Type is configured to prompt ORCID iD Authentication, co-Authors will be presented with a similar process as Corresponding Authors after clicking the deep link from the co-Author verification letter. If an ORCID iD has already been provided for the co-Author, a 'Link to ORCID Profile' button will be available, sending the co-Author to ORCID.org to Authenticate their iD. Similarly, if an ORCID iD hasn't been provided for the co-Author, the 'Link to ORCID Profile' button will be shown. If the co-Author has already registered and provided an Authenticated ORCID iD, the ORCID iD will be displayed with an ORCID icon ( ) and the co-Author will be able to proceed with Authorship verification.

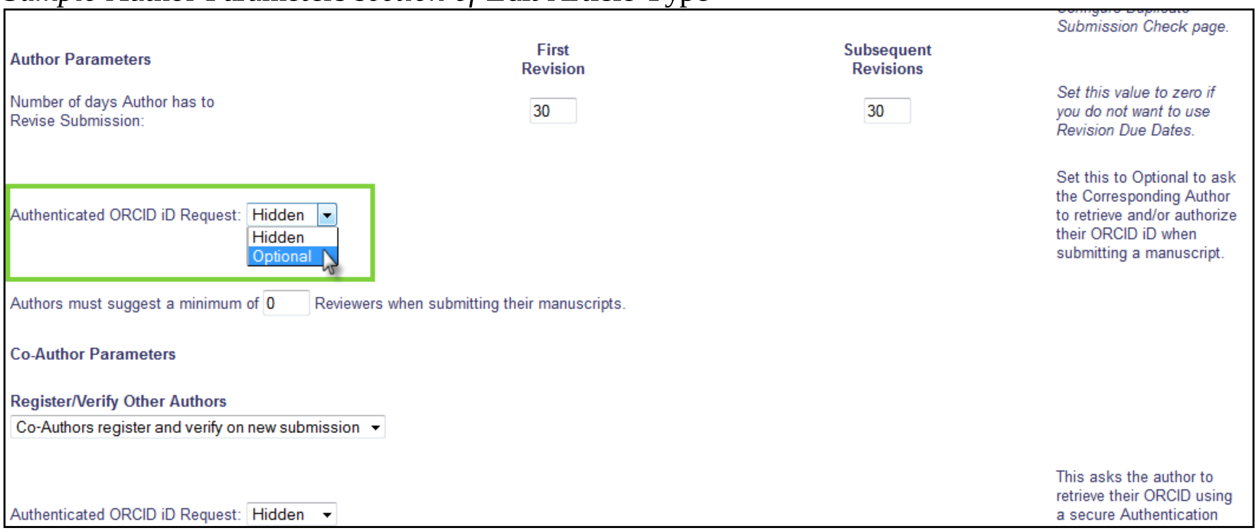
Sample Co-Author Verification *interface – a Co-Author Questionnaire has been configured and the user's ORCID iD has not yet been Authenticated*



TO CONFIGURE: The new ORCID Authentication settings are configured in ‘Edit Article Types’, found in *PolicyManager*. Click ‘Edit’ for any existing Article Type or the ‘Add’ button to create a new Article Type.

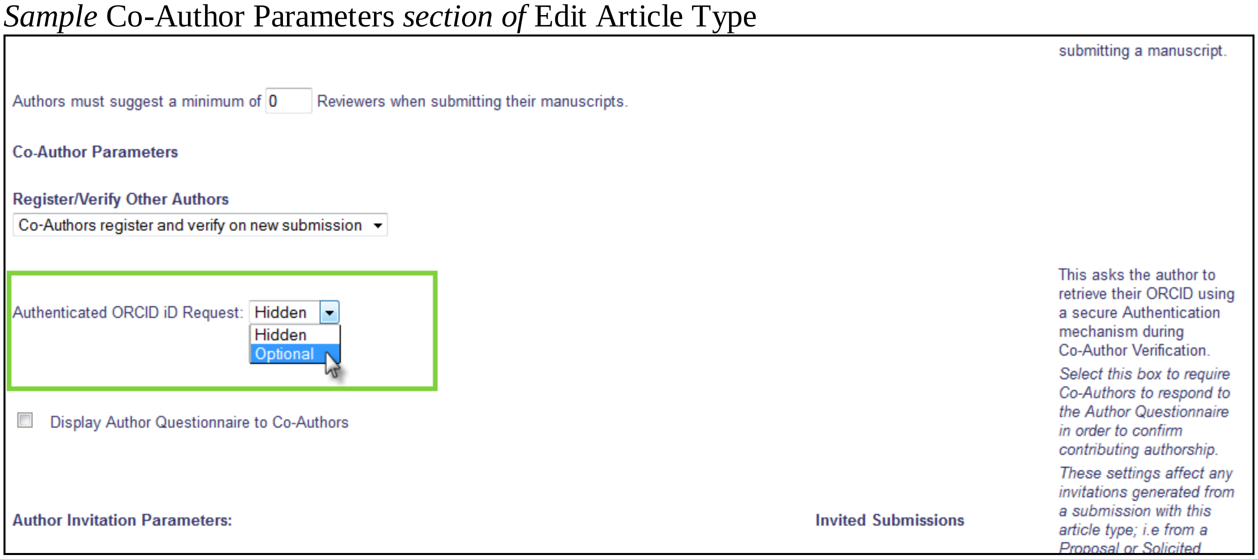
To enable an ORCID iD check for Corresponding Authors after the Article Type has been selected in the submission interface, select ‘Optional’ from the ‘Authenticated ORCID iD Request’ drop down list in the ‘Author Parameters’ section.

Sample Author Parameters *section of* Edit Article Type



To enable ORCID Authentication for co-Authors verifying co-Authorship, select ‘Optional’ from the ‘Authenticated ORCID iD Request’ drop down list in the ‘Co-Author Parameters’ section of the page. Additionally, Co-Author Verification must be enabled (either with or without Registration) in the ‘Register/Verify Other Authors’ drop down list above.

Sample Co-Author Parameters *section of* Edit Article Type



Publications may also wish to offer customized instructions for ORCID iD Authentication. To enter customized instructions that will appear along with the new ORCID Authentication sections of the submission process and Co-Author Verification, click the new ‘Edit Request Authenticated ORCID iD Instructions’ link in the ‘Submission Policies’ section of *PolicyManager*.

Sample PolicyManager *page*

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
- Edit Request Authenticated ORCID iD 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

Customized instructional text may then be entered for both Corresponding Author Submission and Co-Author Verification.

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Sample Edit ‘Request Authenticated ORCID iD’ Instructions *page*

Edit 'Request Authenticated ORCID iD' Instructions

Enter the instructions to be displayed when requesting an Authenticated ORCID Identifier from the Corresponding Author during manuscript submission, or from a Co- Author during Other Author verification. These appear when the associated check has been configured under the Article Type for a submission, and the author in question has not yet retrieved and authenticated an ORCID iD.

Cancel Submit

Area	Instructions
Corresponding Author for Submission	Insert Special Character This publication requests that Authors Link to their ORCID profile to Authenticate their ORCID iD before they submit. You only need to do this once in order to permanently associate your ORCID View Default Instructions Revert to Default Instructions
Co-Author during Verification	Insert Special Character This publication requests that authors link to their ORCID profile to retrieve an 'Authenticated' ORCID Identifier. This will support the correct attribution of this submission to you if accepted for View Default Instructions Revert to Default Instructions

Cancel Submit

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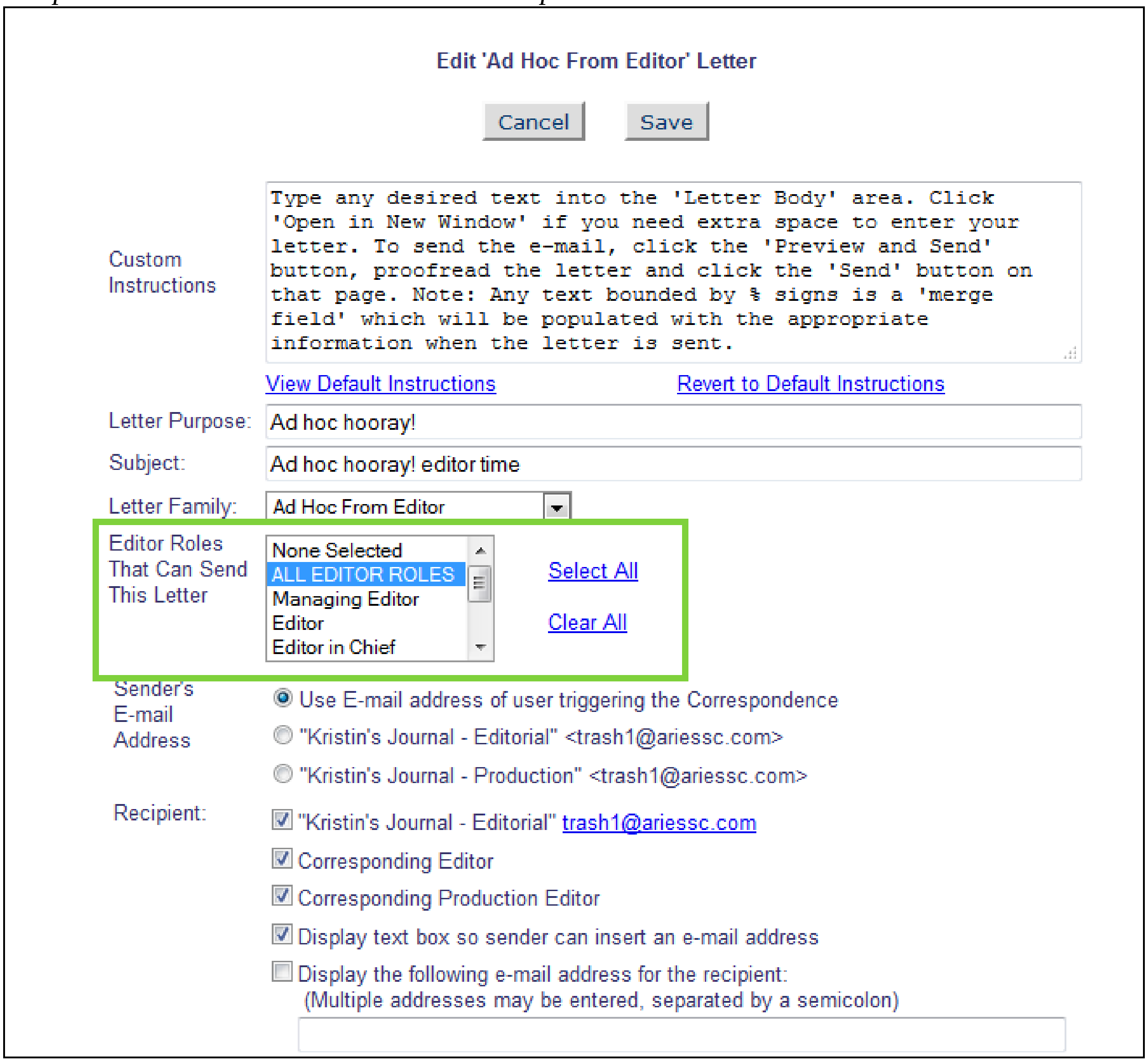
Restrict Ad Hoc Letters to Specific Editor Roles

In EM/PM version 11.1, when an Editor clicks the 'Send E-mail' action link, all letters configured in the 'Ad Hoc From Editor' family are displayed and available for use.

In EM/PM version 11.2, publications have the option to limit the ad hoc letters available to each Editor Role in the letter template. A new selector box is displayed on the *Add/Edit 'Ad Hoc From Editor' Letter* page containing a list of Editor Roles. Administrators may restrict the letter usage to specific Editor Roles or select 'ALL EDITOR ROLES' to keep with current functionality.

Sample Edit 'Ad Hoc From Editor' Letter *template*



NOTE: Upon upgrade, 'ALL EDITOR ROLES' is selected for existing letters.

NOTE: Letters may be configured and saved with 'None Selected' as the selection for the 'Editor Roles That Can Send This Letter'. When this option is selected, the letter will not be available to any Editor Role.

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TO CONFIGURE: From the ‘Edit Letters’ link in *PolicyManager*, add or edit an existing letter in the ‘Ad Hoc From Editor’ family. Use the multi-selector box to choose the Editor Roles that may send the configured letter.

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Custom Metadata ID for Transferring Submission Questions

In EM version 11.1, Custom Questions and Responses may be transferred to another EM publication, but the Question Text string must have an exact match on the receiving publication in order for the response to be transferred. If the receiving EM publication has slightly different Custom Question Text (but the intent of the question is the same) than the originating publication, the Question Response will not be transferred.

In EM version 11.2, a Custom Metadata ID may be used to match Custom Submission Questions on a target publication using EM-to-EM Transfer. If the Custom Metadata ID for the Custom Question on the receiving publication matches the Custom Metadata ID for the same Custom Question on the originating publication, the Custom Question and Response are transferred even if the Question text does not match. For example, publications might have slightly different wording of a Copyright Transfer or Disclaimer, but the overall intent of the question is the same.

NOTE: For Custom Questions that include follow-up questions, separate Custom Metadata IDs may be entered to ensure that all parts of the question are transferred to the target publication.

NOTE: Co-Author Questionnaires are not included in the submission transfer process.

NOTE: Even if the Custom Metadata IDs match between the publications, the configuration of the question has to be the same on both publications. Specifically, the Article Type must match and configured to use the same type of Questionnaire (Submission or Author). Also, the Response Type (i.e. List Type using radio button responses) of the question must be the same on both publications and the selected responses must exist in the target publication.

TO CONFIGURE: The publications must be using EM-to-EM Transfer to use this feature. Custom Metadata IDs for Custom Questions must be configured on both the home publication and the target publication.

NOTE: A Custom ID has always been available on this page for Transmittal use, but it is being renamed and moved on the page; and extended to be used in submission transfers. If publications are already using the ID for Transmittal, this will continue to work as is.

In the 'Questionnaire Policies' section of *PolicyManager*, click 'Create Custom Questions'. Add or edit any existing question. At the bottom 'Add/Edit Custom Question' page, the Custom Metadata ID may be entered in the 'Integration Options' section.

Sample Add/Edit Custom Question *page, 'Integration Options' section shown*

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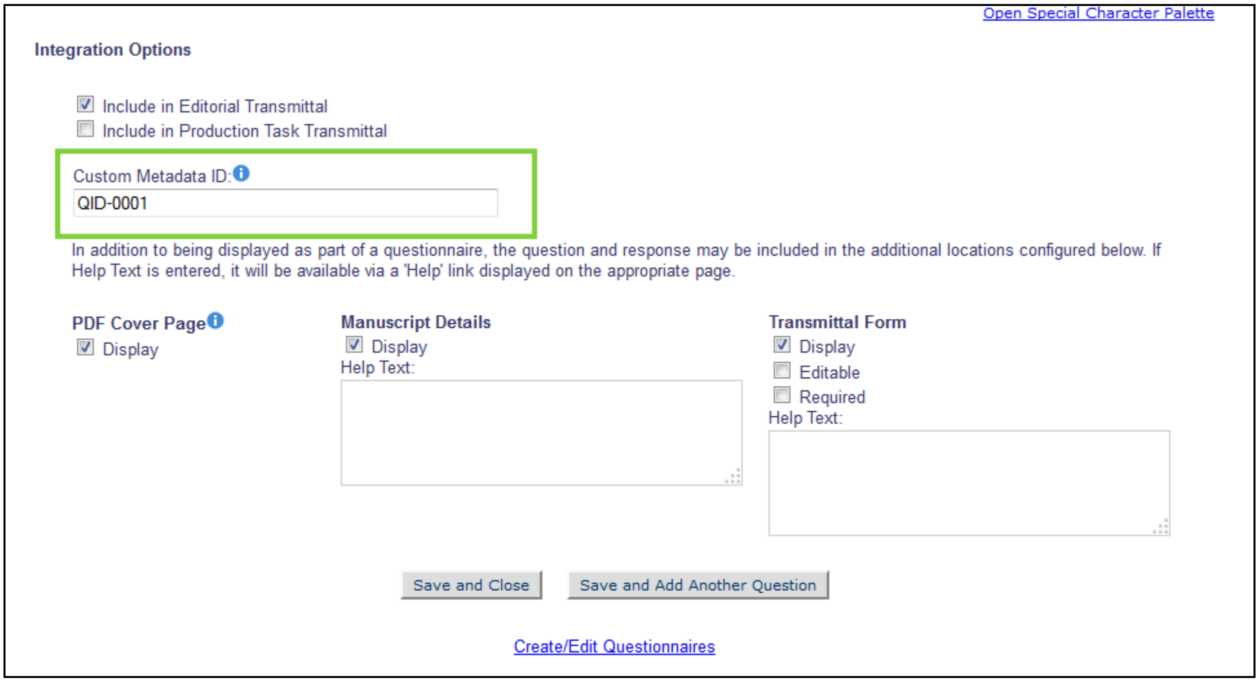
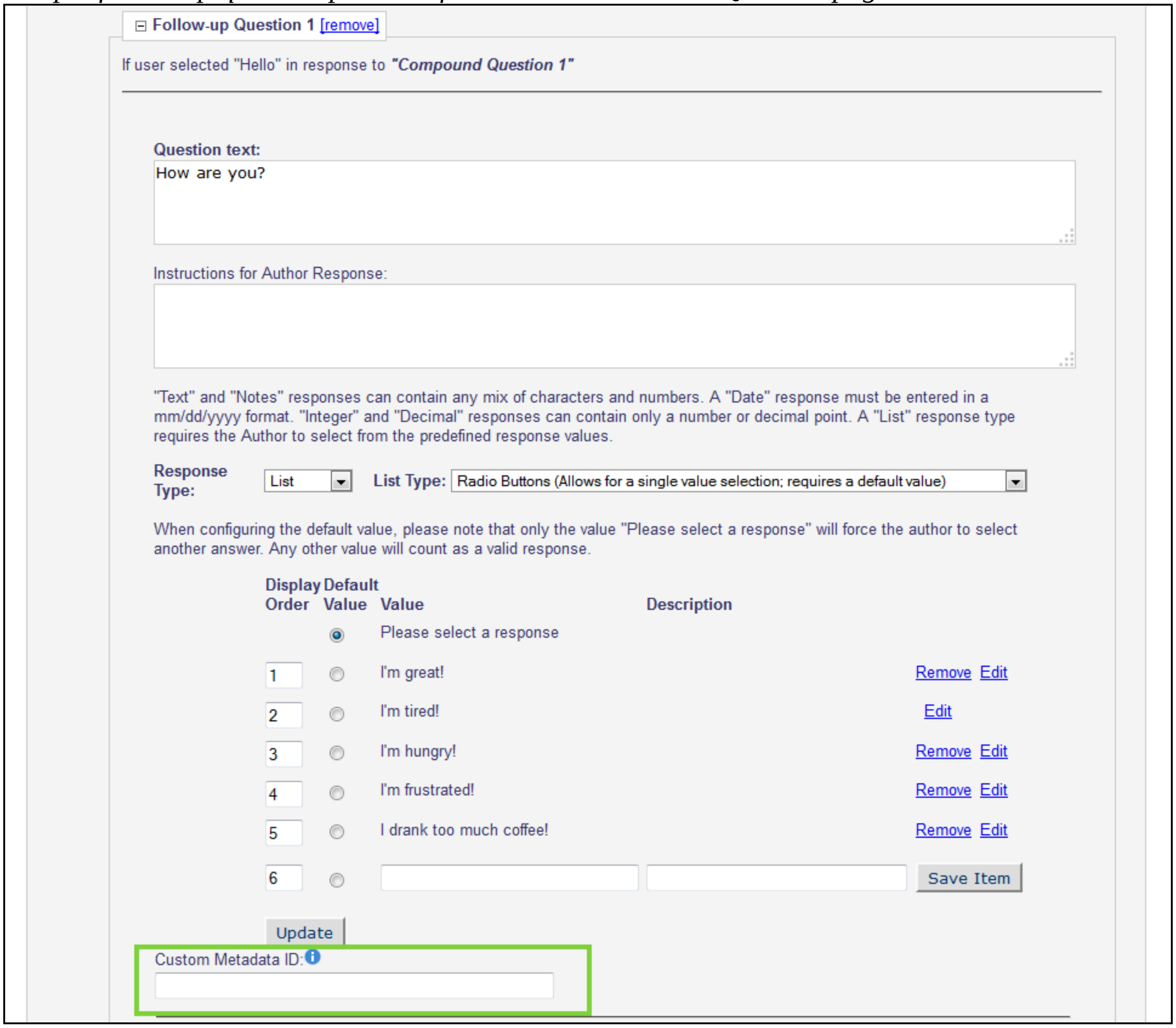


If the publication has multi-part questions, a Custom Metadata ID field is added for follow-up questions. To access the new field, click the '+' icon and expand the follow-up question. The Custom Metadata ID field will be at the bottom of the follow-up question section.

Sample follow-up question portion of the Add/Edit Custom Question *page*



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PRODUCTION TRACKING ENHANCEMENTS

Production Task Questionnaires

In EM version 11.1, custom questions may be created and added to questionnaires that may be used during manuscript submission or displayed to co-Authors of a submission.

New in EM version 11.2, questionnaires may also be associated with Production Tasks. From the ‘Add/Edit Submission Production Task’ configuration page, administrators may select a Questionnaire that will be shown when the assignee submits a Production Task.

NOTE: Questionnaire functionality is currently not available for Schedule Group Production Tasks, tasks submitted via FTP (Import), or milestone tasks.

Additionally, the Production Task Questionnaire and any responses may be displayed on the *Details* page, the Transmittal XML (if configured), the Task Completion letter (using a new %PRODUCTION_QUESTIONNAIRE_RESPONSES% merge field), and in Reporting Views.

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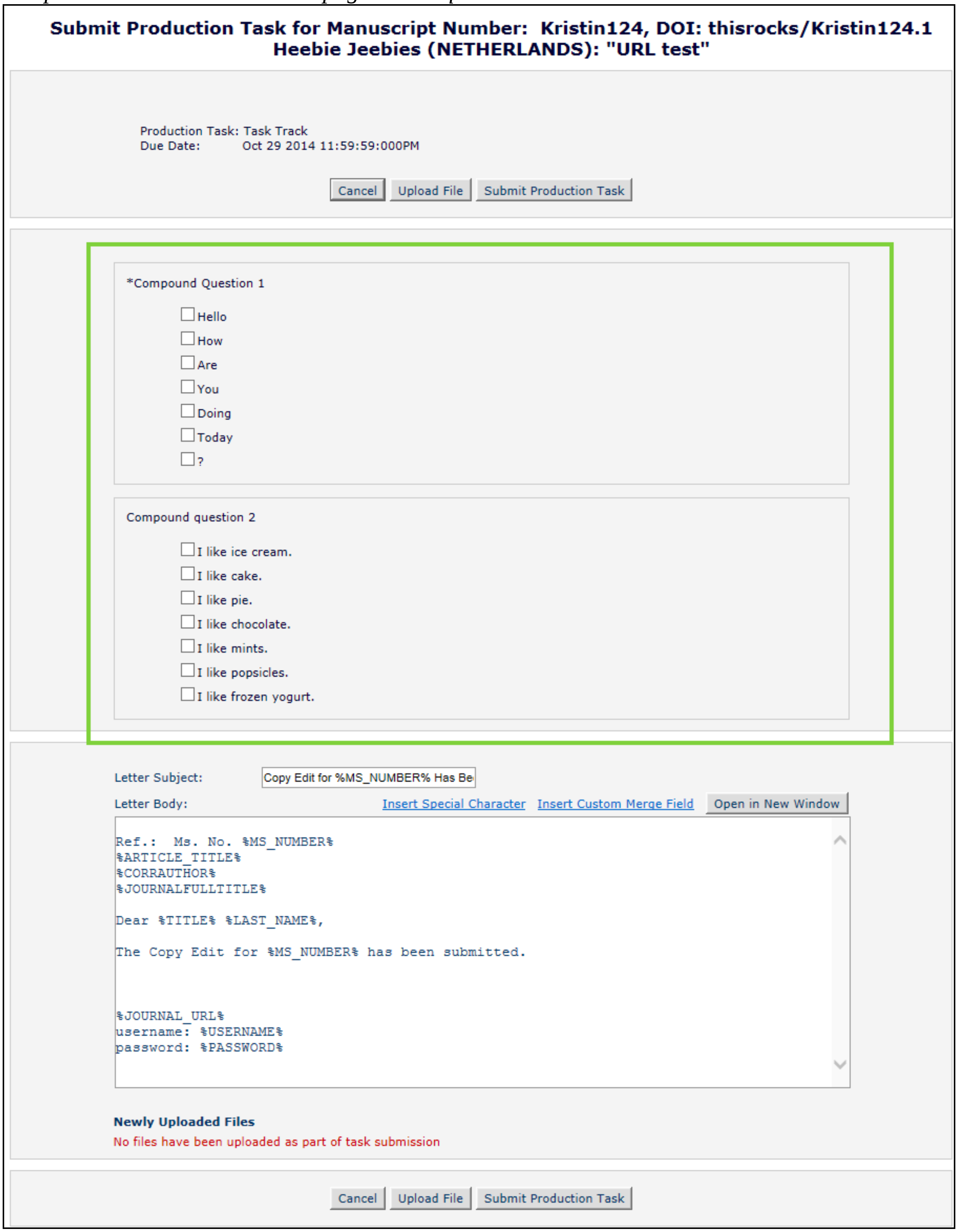
Sample Submit Production Task *page with a questionnaire associated*



Submit Production Task for Manuscript Number: Kristin124, DOI: thisrocks/Kristin124.1
Heebie Jeebies (NETHERLANDS): "URL test"

Production Task: Task Track
Due Date: Oct 29 2014 11:59:59:000PM

Cancel | Upload File | Submit Production Task

*Compound Question 1

- ☐ Hello
- ☐ How
- ☐ Are
- ☐ You
- ☐ Doing
- ☐ Today
- ☐ ?

Compound question 2

- ☐ I like ice cream.
- ☐ I like cake.
- ☐ I like pie.
- ☐ I like chocolate.
- ☐ I like mints.
- ☐ I like popsicles.
- ☐ I like frozen yogurt.

Letter Subject: Copy Edit for %MS_NUMBER% Has Be

Letter Body: Insert Special Character | Insert Custom Merge Field | Open in New Window

```
Ref.:  Ms. No. %MS_NUMBER%
%ARTICLE_TITLE%
%CORRAUTHOR%
%JOURNALFULLTITLE%

Dear %TITLE% %LAST_NAME%,

The Copy Edit for %MS_NUMBER% has been submitted.


%JOURNAL_URL%
username: %USERNAME%
password: %PASSWORD%
```

Newly Uploaded Files

No files have been uploaded as part of task submission

Cancel | Upload File | Submit Production Task

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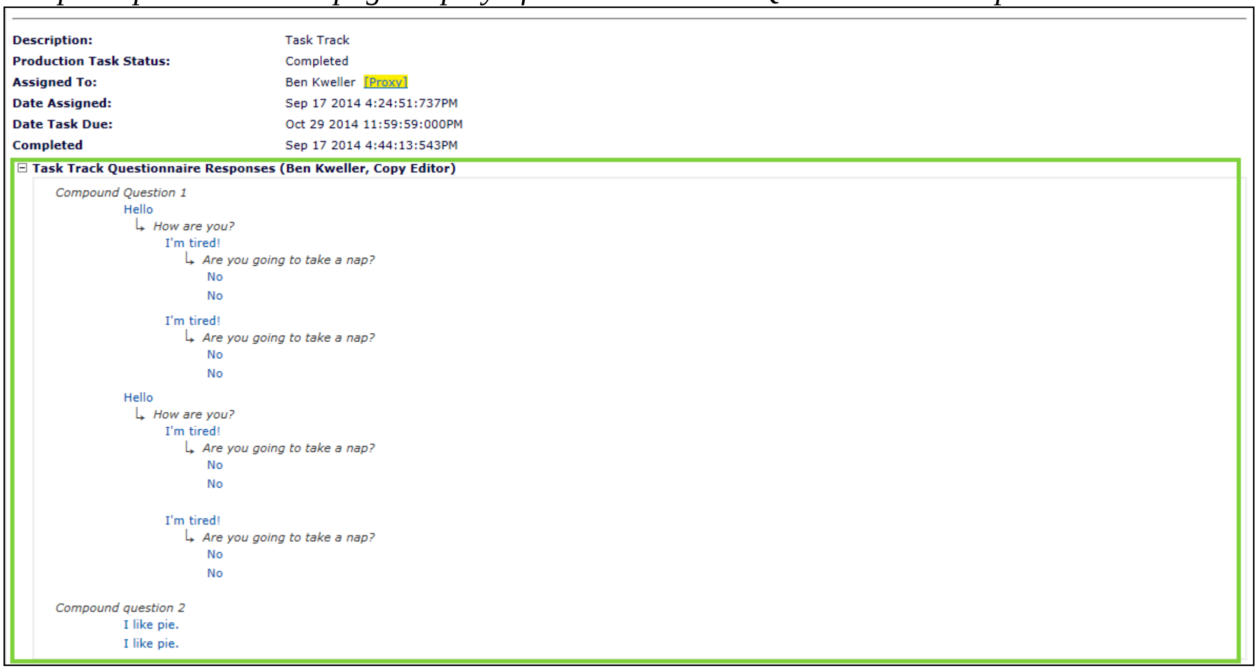
Once a task is submitted and the questionnaire completed, the responses are displayed in the ‘Production Tasks’ section of the *Production Details* page. The display of the questionnaire responses is collapsed by default, but users may expand the section to view the completed Questionnaire by clicking the ‘+’ icon next to ‘[Task Name] Questionnaire Responses’ link.

Sample expanded Details *page display of Production Task Questionnaire Responses*

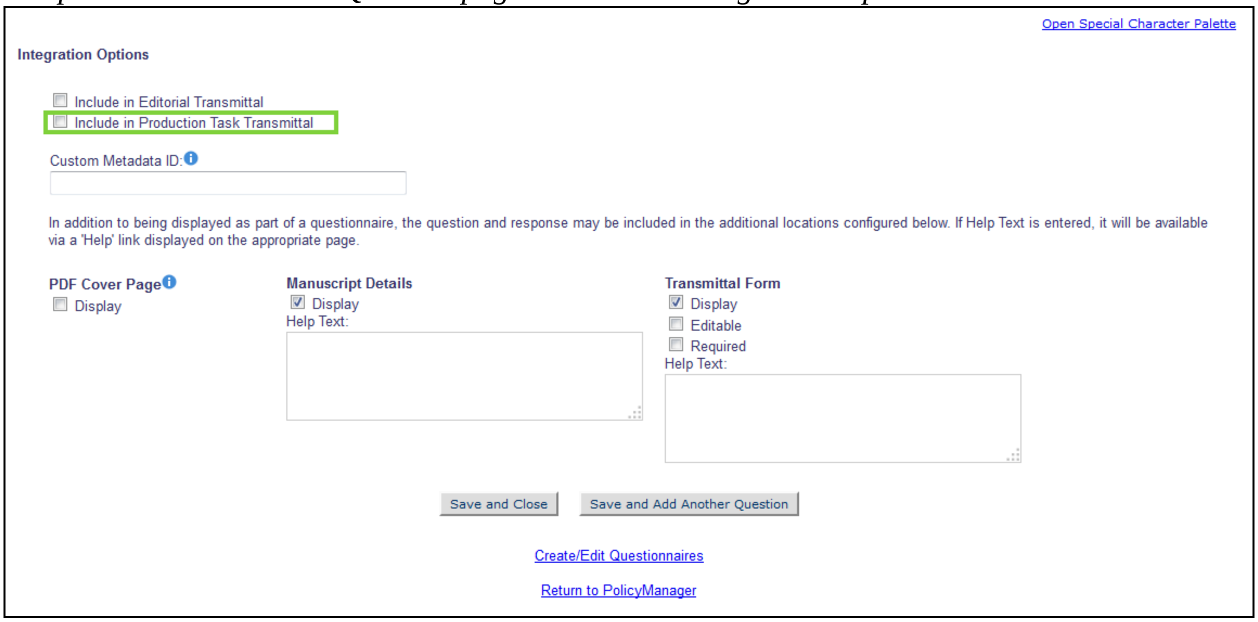


TO CONFIGURE: In the new ‘Questionnaire Policies’ section of *PolicyManager*, click the ‘Create Custom Questions’ link. From the ‘Create Custom Questions’ page, existing questions may be edited by clicking the ‘Edit’ link or new ones may be added by clicking the ‘Add Question’ button.

To make a question and its response available the Production Task Transmittal metadata XML, select the ‘Include in Production Task Transmittal’ checkbox in the ‘Integration Options’ section at the bottom of the page.

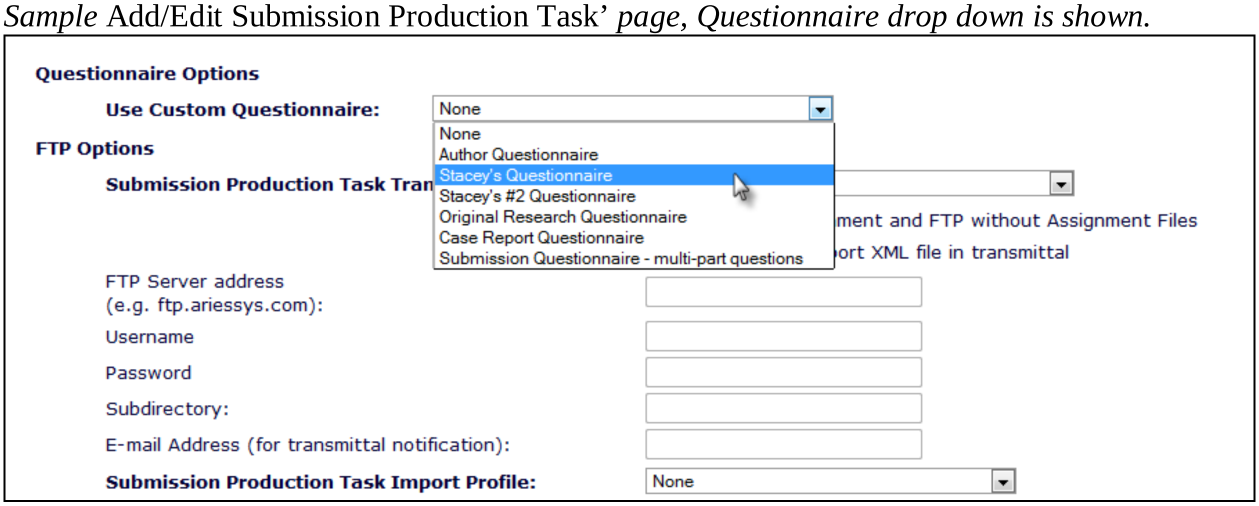
NOTE: This will only be included for tasks that use the NLM 3.0 or JATS 1.0 Transmittal Methods.

Sample Add/Edit Custom Question *page scrolled to 'Integration Options'*



As in existing functionality, Custom Questions must then be associated with a Questionnaire on the 'Create Questionnaires' page, accessed by the link in the 'Questionnaire Policies' section of *PolicyManager*. Add or edit an existing Questionnaire to add newly created Custom Questions. Once a Questionnaire has been created, it may then be associated with a Submission Production Task. In the 'ProduXion Manager' section of *PolicyManager*, click the 'Configure Submission Production Tasks' link. Add or edit any existing Submission Production Task. On the 'Add/Edit Submission Production Task' page, select a Questionnaire from the drop down list of all existing Questionnaires in the 'Questionnaire Options' section of the page (located above the 'FTP Options' section).

Sample Add/Edit Submission Production Task' *page, Questionnaire drop down is shown.*



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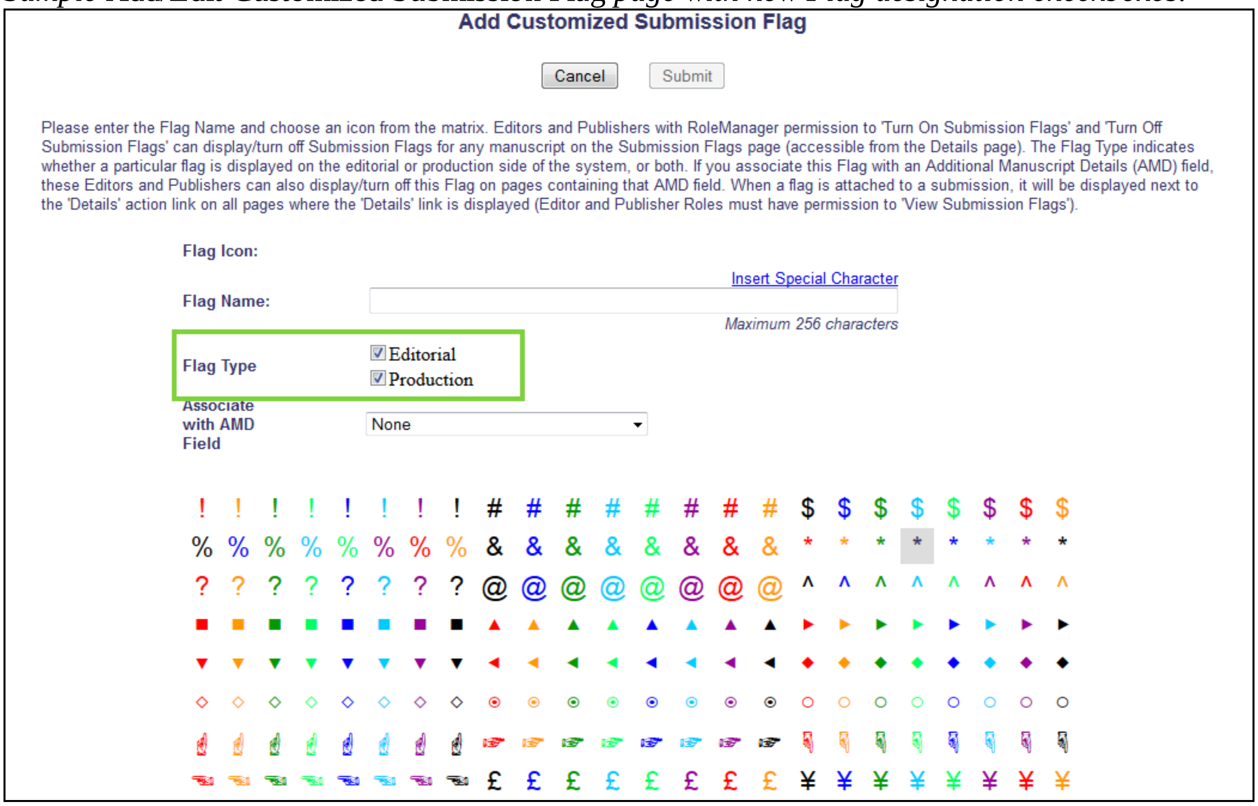
Custom Production Flags

In PM version 11.1, 968 Custom Flags are available for configuration as either Submission Flags or People Flags. Once a flag has been configured for use, the icon may not be re-used for another type of flag (for example, the symbol used for a particular Submission Flag may not be used to configure a People Flag). Once a flag has been associated with a submission, it is visible next to the link to the *Details* page and directly on the *Details* page layout (if configured).

New in PM version 11.2, Production Tracking users have access to 500 new flag icons (in addition to the existing 968) that may be configured specifically for Submissions in Production.

Production Tracking users will be able to designate the type of Submission Flag: Editorial (EM-only), Production (PM-only), or available for use in both sides of the system.

Sample Add/Edit Customized Submission Flag *page with new Flag designation checkboxes:*



NOTE: Upon upgrade, existing Submission Flags in use will automatically be set as both Editorial *and* Production flag types.

NOTE: The 500 new flags are only available to publications using Production Tracking, though the flags may be used as People Flags as well as Submission Flags. When using Search Submissions, both Editorial and Production Flags may be displayed depending on whether the search was initiated from the Editorial or Production menu.

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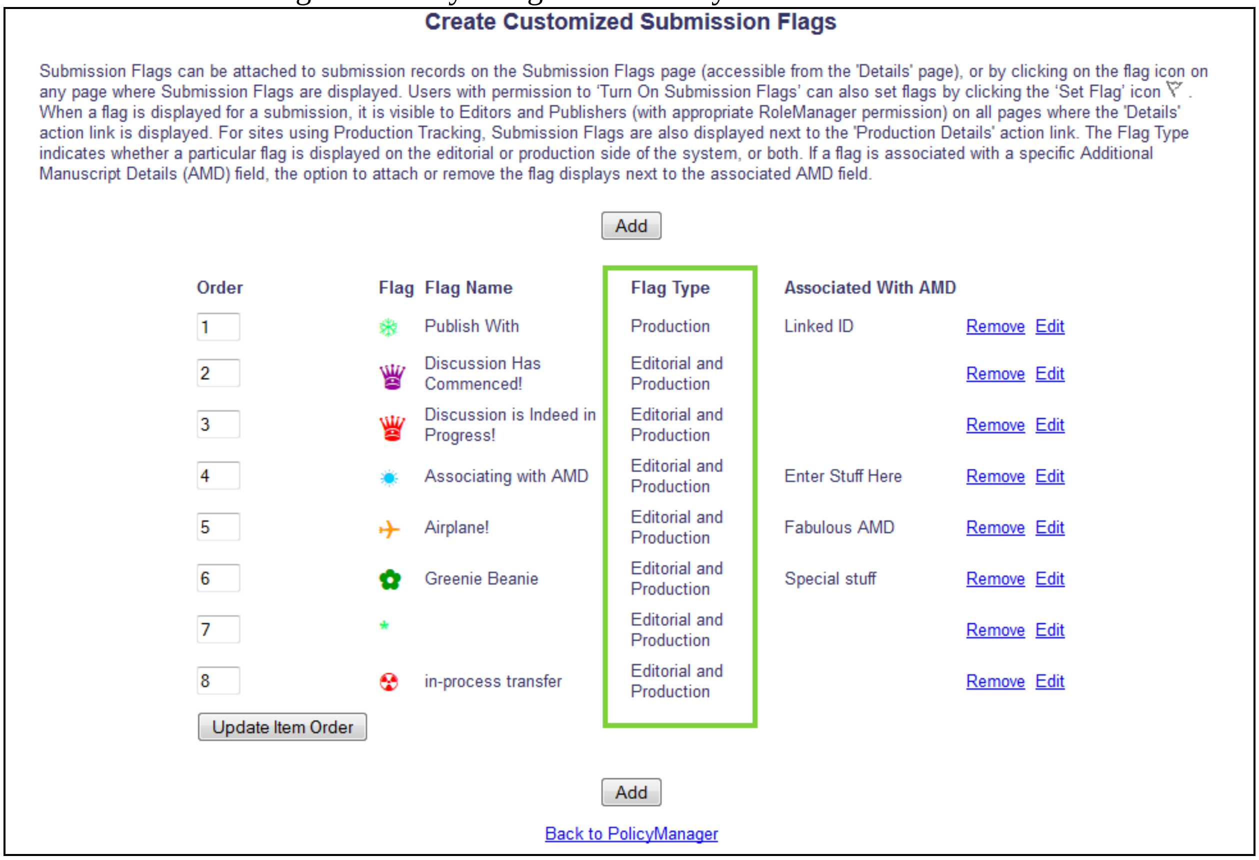
A new ‘Flag Type’ column is added to the *Create Customized Submission Flags* page that indicates how each Flag is currently being used in the system.



Create Customized Submission Flags

Submission Flags can be attached to submission records on the Submission Flags page (accessible from the 'Details' page), or by clicking on the flag icon on any page where Submission Flags are displayed. Users with permission to 'Turn On Submission Flags' can also set flags by clicking the 'Set Flag' icon . When a flag is displayed for a submission, it is visible to Editors and Publishers (with appropriate RoleManager permission) on all pages where the 'Details' action link is displayed. For sites using Production Tracking, Submission Flags are also displayed next to the 'Production Details' action link. The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both. If a flag is associated with a specific Additional Manuscript Details (AMD) field, the option to attach or remove the flag displays next to the associated AMD field.

Add

Order	Flag	Flag Name	Flag Type	Associated With AMD	
1		Publish With	Production	Linked ID	Remove Edit
2		Discussion Has Commenced!	Editorial and Production		Remove Edit
3		Discussion is Indeed in Progress!	Editorial and Production		Remove Edit
4		Associating with AMD	Editorial and Production	Enter Stuff Here	Remove Edit
5		Airplane!	Editorial and Production	Fabulous AMD	Remove Edit
6		Greenie Beanie	Editorial and Production	Special stuff	Remove Edit
7			Editorial and Production		Remove Edit
8		in-process transfer	Editorial and Production		Remove Edit

Update Item Order

Add

Back to PolicyManager

TO CONFIGURE: In *PolicyManager*, click the ‘Create Customized Submission Flags’ link underneath the ‘General Policies’ section. ‘Flag Type’ designation may be set by either editing an existing Flag or clicking the ‘Add’ button to create a new one. On the ‘Add/Edit Customized Submission Flag’ page, select the ‘Flag Type’ to designate where the configured flag will be used: Editorial, Production, or both parts of the system.

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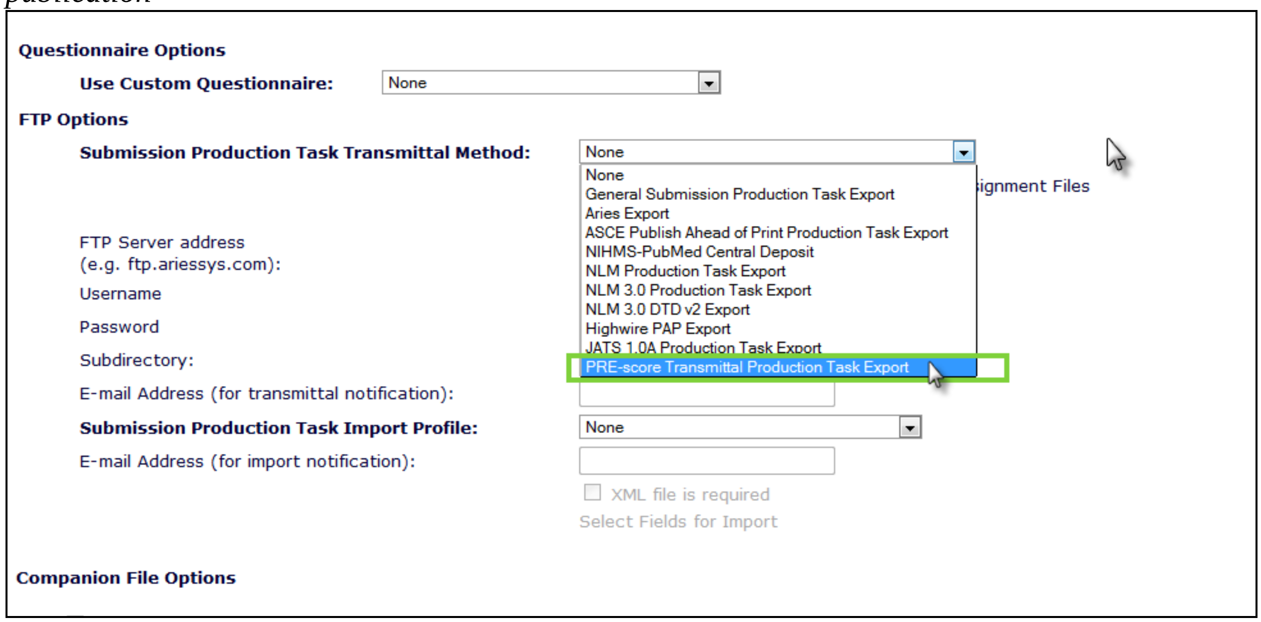
PRE Production Task Transmittal

In PM version 11.1, files may be transmitted to third parties via FTP upon Production Task Assignment. This type of Submission Production Task may generate an XML file with submission metadata and can include submission and assignment files.

In PM version 11.2, a new Submission Production Task Transmittal Method is added that can be configured to trigger an XML export on Acceptance of a submission to be used for calculating the Peer Review Evaluation Score (PRE). To access this new Task Transmittal Method, publications will need to contact their Aries Account Coordinator.

Once enabled, publication administrators may select ‘PRE Transmittal Production Task Export’ as a Production Task Transmittal Method in the ‘FTP Options’ section of the ‘Add/Edit Submission Production Task’ page.

Sample Add/Edit Submission Production Task *page where* PRE Export *has been enabled for the publication*



The XML file that is triggered upon assignment includes the following submission metadata: Author, Article title, complete Reviewer information for all revisions, and complete Editor information for all editors in the chains of all revisions.

TO CONFIGURE: Contact your Aries Account Coordinator to enable ‘PRE Export’. Once enabled, click the ‘Configure Submission Production Tasks’ link in the ‘ProduXion Manager’ section of *PolicyManager*. Edit an existing task or click the ‘Add’ button to create a new one. The new ‘PRE Transmittal Production Task Export’ is available in the ‘Submission Production Task Transmittal Method’ drop down menu in the ‘FTP Options’ section of the page. After the method is selected, enter the FTP server information and add an e-mail address for all Transmittal notifications associated with this task.

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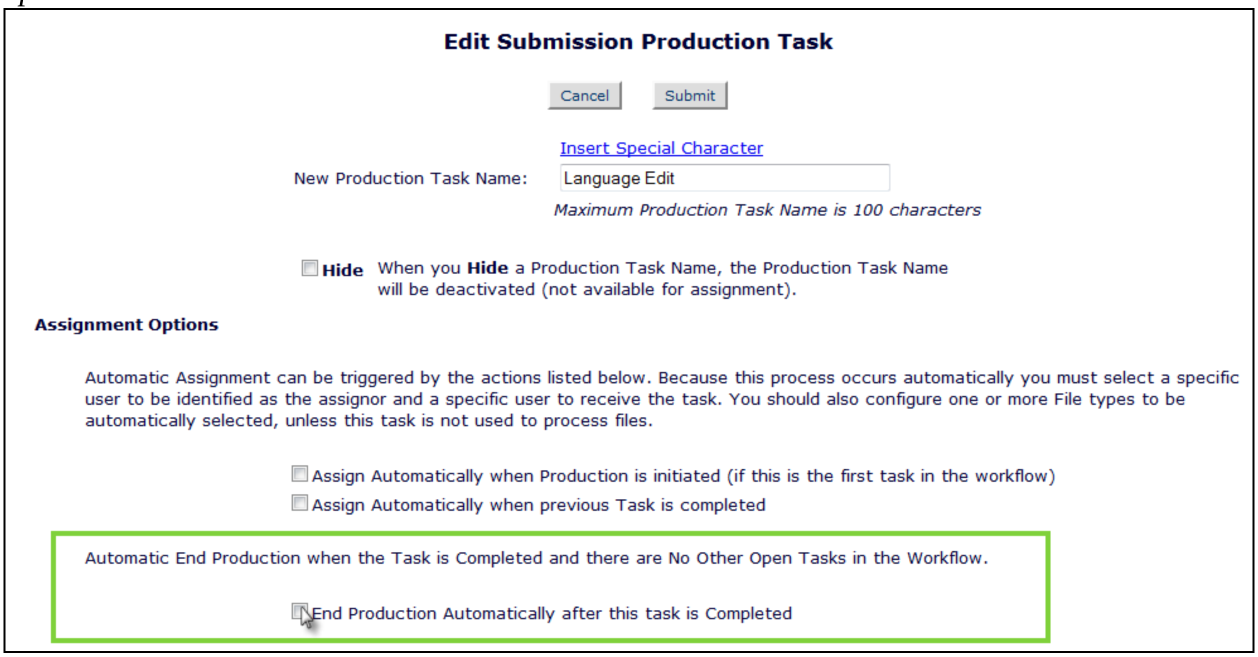
Automatically End Production upon Production Task Completion

In PM version 11.1, Production Tracking users may end production on a submission by clicking the 'End Production' action link. Thissend the submission to the 'View All Submissions with Production Completed' folder on the Production Tasks main menu.

New in PM version 11.2, Production Tracking users may elect to automatically end production when a Submission Production Task has been completed.

Sample Edit Submission Production Task *page displaying new 'End Production Automatically' option*



On the 'Add/Edit Submission Production Task' page, administrators may select an 'End Production Automatically after this task is Completed' option. When there are no other Production Tasks in the Submission Workflow and this new option has been enabled, the submission will be sent to the 'View All Submissions with Production Completed' folder upon the completion of the configured task.

NOTE: Once this option has been selected, the 'Allow Follow-on Task Assignments' option on 'Add/Edit Submission Production Task' cannot be enabled.

NOTE: If 'End Production Automatically' is enabled for a Task but there are still open tasks in the Submission Workflow, the submission will remain in Production and Task Assignment will resume.

TO CONFIGURE: Click the 'Configure Submission Production Tasks' link in *PolicyManager* in the 'ProduXion Manager' section. Add or Edit an existing Submission Task to enable the new 'End Production Automatically after this task is Completed' option.

MERGE FIELD ENHANCEMENTS

Production Questionnaire Responses Merge Field

In PM 11.2, a new merge field is available for use in the 'Submit Task' letter associated with a Submission Production Task: **%PRODUCTION_QUESTIONNAIRE_RESPONSES%**. This new merge field inserts the Questions and Responses for the task with which the letter is associated.

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ENTERPRISE ANALYTICS REPORTING ENHANCEMENTS

Publication Groups

In EM/PM version 11.1, users may report across all submissions in a Business Publisher Group using Cross-Publication Enterprise Analytics Reporting.

New in EM/PM version 11.2, administrators may restrict the results of Cross-Publication Enterprise Analytics Reports to a specific subset of publications. Business Publisher staff will be able to manage and assign Publication Groups as well as restrict Editor Roles to access only certain Publication Groups when running Cross-Publication Reports.

Sample Cross-Publication Enterprise Analytics Reporting *main menu for an Editor with access only to certain Publication Groups*

Users with a new sub-permission ‘Manage Publication Groups’, found in the ‘Configured Restricted System Administration Access Rights’ part of *AdminManager*, will see a new ‘Manage Publication Groups’ link on the *AdminManager* Main Menu.

Sample new Manage Publication Groups *page, where ‘Add New Group’ has been clicked*

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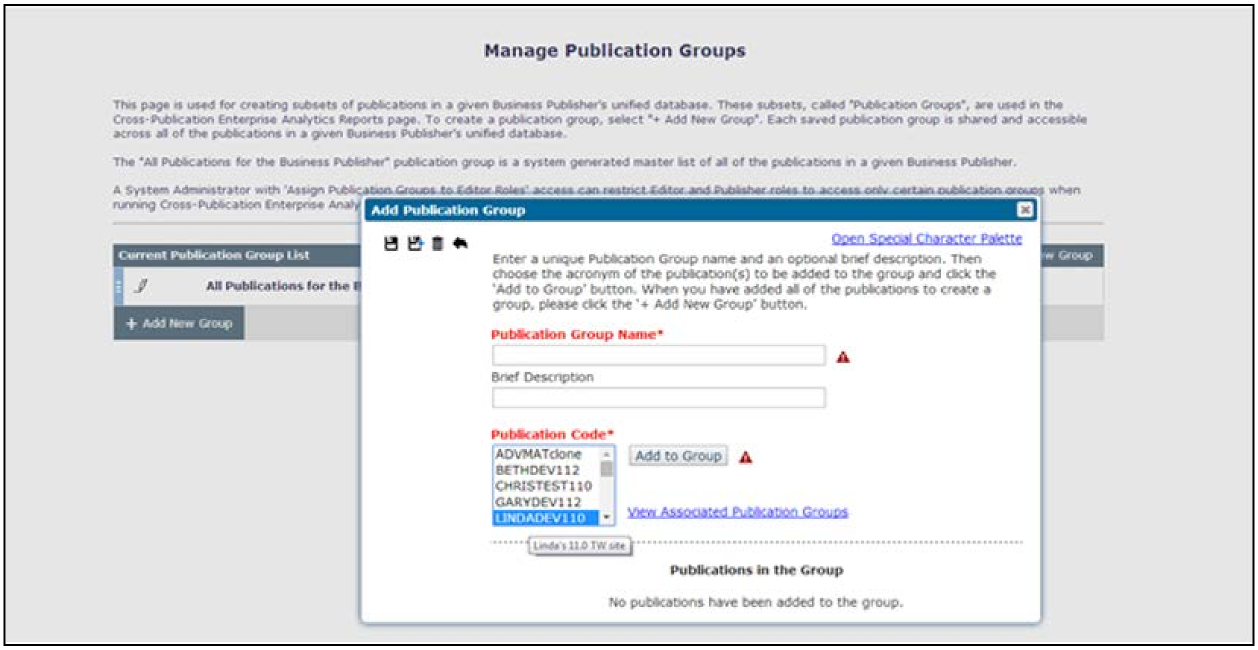

Upon upgrade, the 'Manage Publication Groups' page will only display a default 'All Publications for the Business Publisher' master group. Clicking 'Add New Group' will open an overlay that allows the user to name the new Publication Group and select publication codes from all Publications in the Business Publisher to add to the Group.

Sample Manage Publication Groups *page - a Publication Group has been created*

Once a new Publication Group has been created, it will display on the Manage Publication Groups grid. The Publication Group may be edited by clicking the pencil icon or removed by clicking the trashcan icon. Additionally, users may change the order of the list by dragging and dropping the Publication Group row to the desired spot in the Publication Group grid.

Clicking 'All Publications for the Business Publisher' displays all publications in the Business Publisher. Clicking the publication code hyperlink will bring the user to an 'Associated Publications Groups' pop-up, which displays all the Publication Groups to which the publication belongs.

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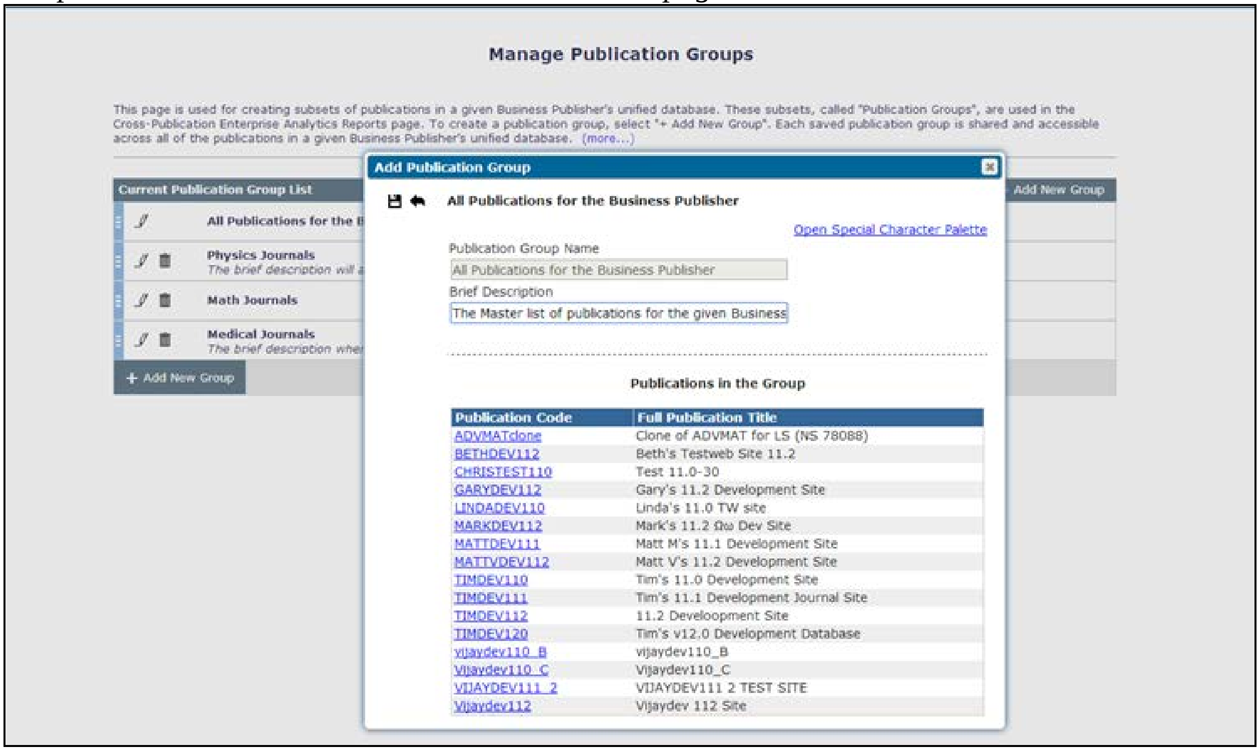
Sample All Publications for the Business Publisher *page*



Once Publication Groups have been created, Editor Roles in the publications within the Business Publisher Group may be configured to only have access to certain Publication Groups in the Cross-Publication Enterprise Analytics Reporting interface. Administrators with 'Assign Publication Groups to Editor Roles' permission enabled in 'Configure Restricted System Administration Access Rights' will be able to grant permissions to other Editor Roles for the existing 'Run Cross-Publication Enterprise Analytics Reports for All Publications' permission and a new sub-permission, 'Restrict to Selected Publication Groups'. Once enabled, administrators will be able to select one or more Publication Groups from a multi-selector box on the 'Edit Role Definition' page.

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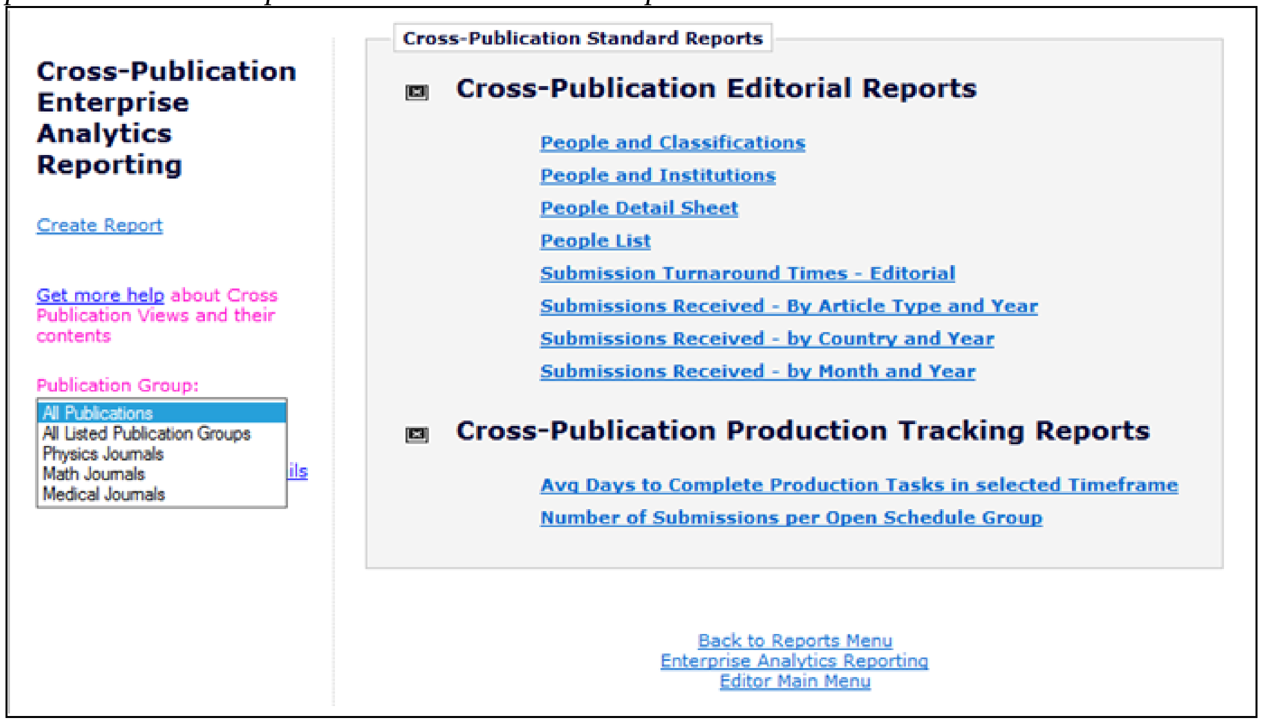
Sample Cross-Publication Enterprise Analytics Reporting *interface where the Editor has permission to run reports on all Publication Groups*



NOTE: If a shared report is run by an Editor who has access to a different Publication Group(s) than the creator, the results will be limited to only publications that are common with the report creator's Publication Group and the Publication Group(s) available to the Editor running the report.

TO CONFIGURE: The Business Publisher must be enabled to use Cross-Publication Enterprise Analytics Reporting by an Aries Account Coordinator.

If Cross-Publication Enterprise Analytics Reporting is enabled for the Business Publisher, the Business Publisher Staff or Administrator will need to access *AdminManager*, found in 'System Administrator Functions'. From there, permissions must be enabled on 'Configure Restricted System Administration Access Rights'.

NOTE: An Editor who has 'Unrestricted' access to System Administrator Functions will be able to this new feature without additional configuration in *AdminManager*.

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Sample Configure Restricted System Adminstration Access Rights *page, new sub-permissions enabled*

‘Assign Publication Groups to Editor Roles’ is a new sub-permission of access to ‘ALL OF ROLEMANAGER’. Once enabled, Editors with this permission may select which Publication Groups an Editor Role has access to when running Cross-Publication Enterprise Analytics Reports.

‘Manage Publication Groups’ is a new sub-permission of access to ‘ALL OF ADMINMANAGER’. Once enabled, Editors with this permission may create, edit, or remove Publication Groups from the ‘Manage Publication Groups’ page in *AdminManager*.

Once the appropriate permissions in ‘Configure Restricted System Administrator Access Rights’ have been enabled, users with ‘Manage Publication Groups’ permission may create Publication Groups. On the *AdminManager* Main Menu, click the ‘Manage Publication Groups’ link. Editors with ‘Unrestricted’ access to System Administrator Functions will have access to this link without needing to enable permissions in ‘Configure Restricted System Administrator Access Rights’.

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AdminManager Main Menu:

To add a new Publication Group, click '+ Add New Publication Group'. Enter a unique Publication Group Name and select one or more publications from the Publication Code selector box. After selecting publications to include in the group, click the 'Add to Group' button. Added publications will display in the 'Publications in the Group' section of the page. Clicking the disk icon ( ) in the upper left corner of the overlay will save the Publication Group and close the overlay. Clicking the disk with the plus sign icon ( ) saves the Publication Group and resets the form to add another new publication group. Clicking the arrow icon ( ) will cancel and close the overlay without saving any changes. The trash can icon ( ) will remove the group. The 'Remove' option is only available when a Publication Group has not been selected for an Editor Role in *RoleManager*.

NOTE: Selecting a single publication code in the 'Publication Code' selector box will generate a 'View Associated Publication Groups' link. Clicking the link will bring the user to a pop-up that lists all the Publication Groups to which the publication belongs.

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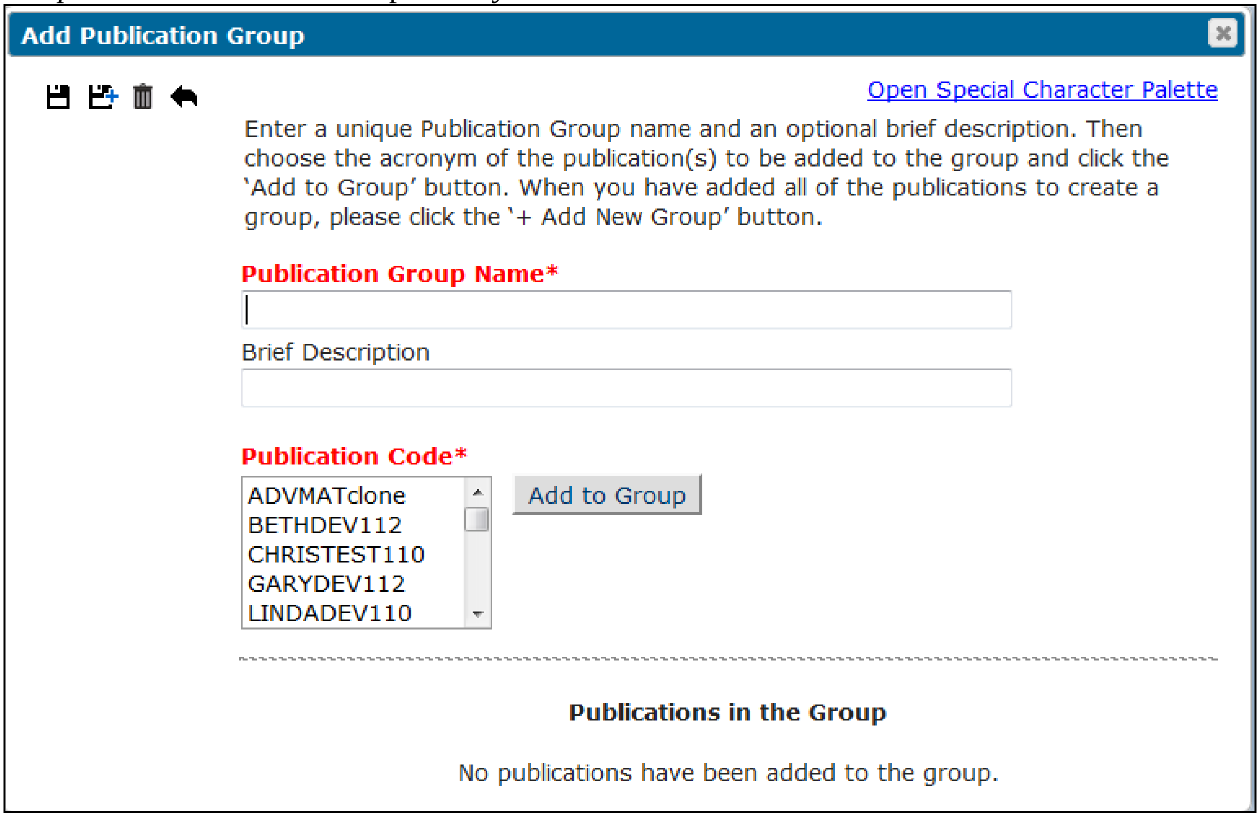
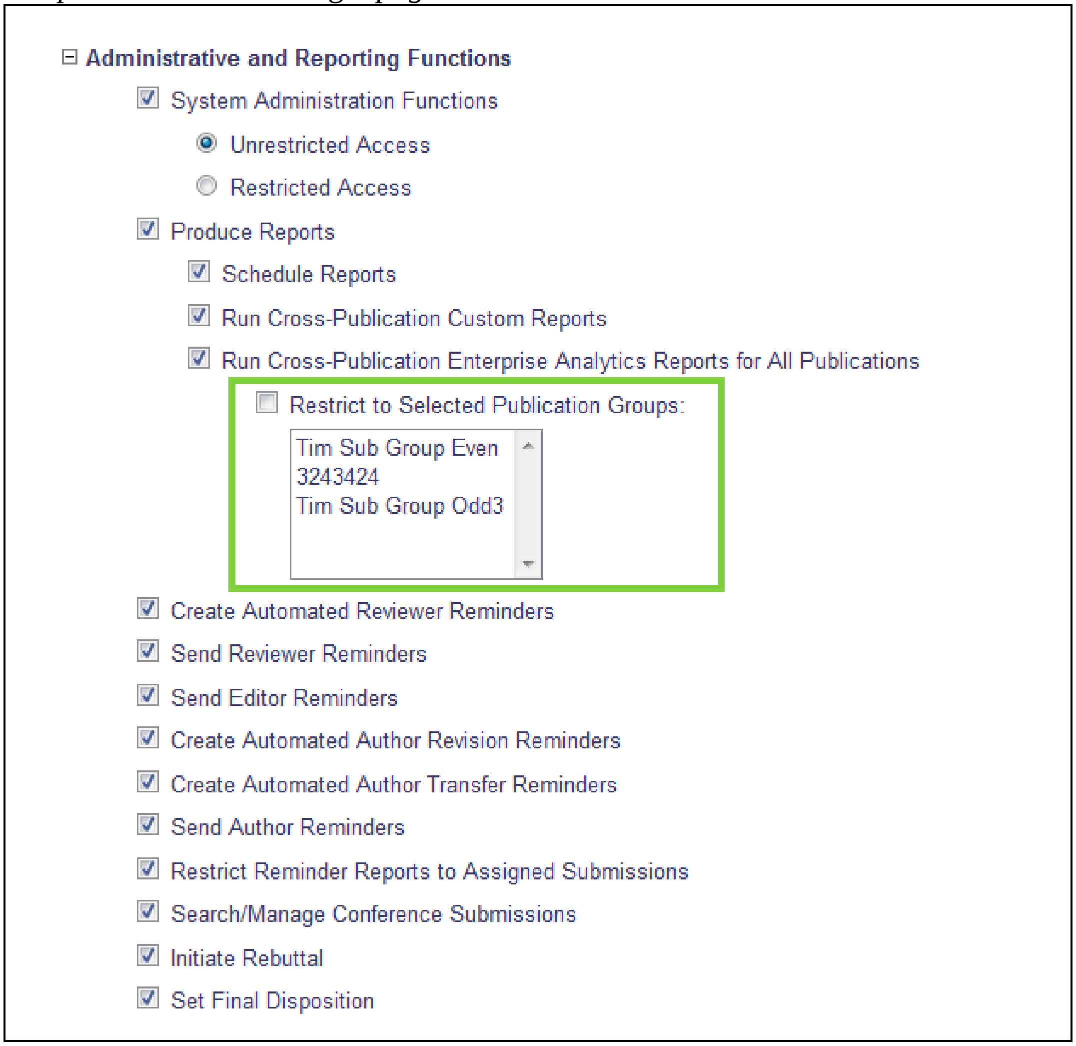
Sample Add Publication Group *overlay*



Once the Publication Group has been created, it will display in the 'Current Publication Group List' beneath the 'All Publications for the Business Publisher' master Group. Clicking the pencil icon ( ) will re-open the Publication Group overlay so the user may make changes to the Group.

To allow Editors access to only certain Publication Groups, an Administrator with 'Assign Publication Groups to Editor Roles' permission enabled in 'Configure Restricted System Administrator Access Rights' must select the desired Publication Groups in Editor *RoleManager*. Add or Edit an existing Editor Role in *RoleManager* . In the 'Administrative and Reporting Functions' section of the page, a new 'Restrict to Selected Publication Groups' sub-permission of 'Run Cross-Publication Enterprise Analytics Reports for All Publications' is available. Once enabled, Administrators will be able to select one or more Publication Groups from the multi-selector box.

Sample Editor RoleManager *page:*



Once Publication Groups are selected for an Editor Role, he or she will only be able to run Cross-Publication Enterprise Analytics Reports using the data from the publications within the selected Groups.

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REPORTING ENHANCEMENTS

Production Task Questionnaire View

In EM/PM version 11.2, a new single-journal Reporting view is added which will return one record for each Production Task/Question combination. Production Tasks that have no associated questions are not included.

The Production Task Questionnaire View fields are as follows:

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Assignor ID [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.ASSIGNED_BY_PEOPLEID]
The People ID of the user who assigned the production task with which this question was associated

Assignor's Role [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.ASSIGNED_BY_ROLE]
The role of the person who assigned the task with which this question was associated

Assignee First Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.ASSIGNED_TO_FIRSTNAME]
The first name of the user to whom this task was assigned

Assignee Last Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.ASSIGNED_TO_LASTNAME]
The last name of the user to whom this task was assigned

Assignee Middle Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.ASSIGNED_TO_MIDDLENAME]
The middle name of the user to whom this task was assigned

Assignee ID [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.ASSIGNED_TO_PEOPLEID]
The People ID of the user to whom this task was assigned

Assignee's Role [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.ASSIGNED_TO_ROLE]
The role in which the user was serving as the assignee of this task

Assignment Date [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.ASSIGNMENT_DATE]
The date on which this production task was assigned

Article Type [DOCUMENT.CATEGORY]
The article type of the submission with which this production task and question are associated

Completion Date [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.COMPLETION_DATE]
The date on which this production task and questionnaire were completed

Corresponding Author's First Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.CORR_AUTH_FIRSTNAME]
The first name of the corresponding author of the submission with which this production task and question are associated

Corresponding Author's Last Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.CORR_AUTH_LASTNAME]
The last name of the corresponding author of the submission with which this production task and question are associated

Corresponding Author's Middle Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.CORR_AUTH_MIDDLENAME]
The middle name of the corresponding author of the submission with which this production task and question are associated

Custom Metadata ID [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.CUSTOM_METADATA_ID]
The current Custom Metadata ID of the question (note: this may have changed since the question was asked)

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Date Production Was Initiated [DOCUMENT.DATE_PRODUCTION_WAS_INITIATED]
The date production was initiated for the submission with which this production task and question are associated

Document ID [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.DOCUMENTID]
The Unique Document ID of the submission with which this production task and question are associated

DOI [DOCUMENT.DOI]
The DOI of the submission with which this production task and question are associated
Hints: According to the standard referred to above, a digital object identifier must take the form 10.[string]/[string], where [string] is a list of one or more Unicode characters.

Article Title [DOCUMENT.DTITLE]
The title of the submission with which this production task and question are associated

Assignor First Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.FIRSTNAME]
The first name of the user who assigned the production task with which this question was associated

Assignor Last Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.LASTNAME]
The last name of the user who assigned the production task with which this question was associated

Assignor Middle Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.MIDDLENAME]
The middle name of the user who assigned the production task with which this question was associated

Short Title [DOCUMENT.SHORT_TITLE]
The short title of the submission with which this production task and question are associated

Manuscript Number [DOCUMENT.PUBDNUMBER]
The manuscript number of the submission with which this production task and question are associated

Schedule Group ID
[PRODUCTION_TASK_QUESTIONNAIRE_VIEW.SCHEDULE_GROUP_ID]
Identifies the schedule group (if any) of the submission associated with this production task and question

Task Assignment ID
[PRODUCTION_TASK_QUESTIONNAIRE_VIEW.TASK_ASSIGNMENT_ID]
A GUID which identifies the particular task assignment with which this question was associated

Submission Question Definition ID
[PRODUCTION_TASK_QUESTIONNAIRE_VIEW.SUBMISSION_QUESTION_DEFINITION_ID]
Identifies the Custom Submission Question definition on which this question was based

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Production Status
[PRODUCTION_TASK_QUESTIONNAIRE_VIEW.PRODUCTION_STATUS]
The current production status of the submission with which this production status and question are associated

Section/Category Name [SECTION.SECTIONNAME]
The section/category of the submission with which this production task and question are associated

Task Name [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.PRODUCTION_TASK_NAME]
The name of the production task for which this question was presented

Assignee's Response [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.RESPONSE]
The task assignee's response to the question. If it was a multi-select type response, the responses are concatenated in a semi-colon delimited list.

Question Text [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.QUESTION_TEXT]
The text of the question, as configured at the time the production task was assigned

Question Order [PRODUCTION_TASK_QUESTIONNAIRE_VIEW.RANK]
The order in which this question appeared on the production task questionnaire

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