

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

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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.

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

[Return to Rescinded Decisions](#)
[Return to Main Menu](#)

View Submission Information:
[View Reviews and Comments](#)

[Manuscript Details](#) ▼

[Classifications](#)

[View Submission](#)

[Author's Reviewer Preferences](#)

Quick Action Links:
[Submit Editor's Decision and Comments](#)

[Send E-mail](#)

[Register and Select New Reviewer](#)

[Request Unregistered Reviewer](#)

[Search Similar Articles in MEDLINE](#)

Set Preferences:
[My Suggest Reviewer Preferences](#)

[My Reviewer Display Preferences](#)

Reviewer Selection Summary - Submission

CAROLINEDEV101-D-13-00002

Duncan James Webber, MD
"Article Title - Redesign the reviewer selection summary page."

Enter Reviewer Selection Instructions Here. This section will be suppressed when content is null. When there are instructions that exceed three lines, the (more/less) expand and collapse option is displayed. The first instance the Reviewer opens the page, the instructions display with the (less) toggle and subsequent visits to the page displays the previous state when the user leaves the page. [\(less...\)](#)

Reviewer Search

Search My Publication

 from

Reviewer Discovery from ProQuest Community of Scholars

Review Settings

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 1 [\[Change\]](#) review(s) have been completed.

Automatically un-invite Reviewers who do not respond to an invitation within 7 [\[Change\]](#) day(s). [\(more...\)](#)

Automatically un-assign Reviewers who do not complete a review within 0 [\[Change\]](#) day(s) of the review due date. [\(more...\)](#)

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers

Caroline Reviewer (Reviewer-OPH) ▼	Review Complete <small>Jan 29 2014 4:45PM</small>
Rex T Jones (Reviewer-OPH) ▼	Review Complete <small>Feb 13 2014 12:59PM</small>

Alternate Reviewers

There are currently no Alternate Reviewers selected for this submission.

Alternate Reviewers will be promoted automatically. [\(more...\)](#)

Proposed Reviewers

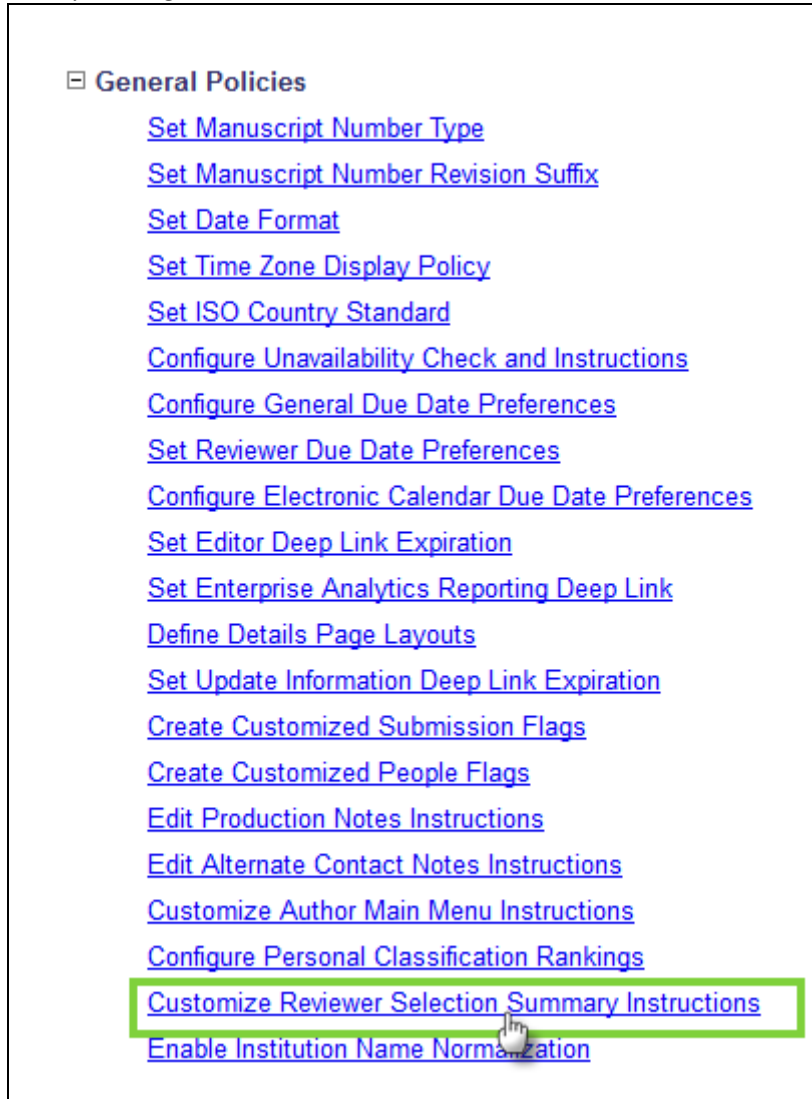
No Reviewers have been proposed by any Editor for this submission.

These reviewers have been chosen as potential reviewers by your colleagues. [\(more...\)](#)

[Return to Rescinded Decisions](#)
[Return to Main Menu](#)

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:



- ☐ **General Policies**
 - [Set Manuscript Number Type](#)
 - [Set Manuscript Number Revision Suffix](#)
 - [Set Date Format](#)
 - [Set Time Zone Display Policy](#)
 - [Set ISO Country Standard](#)
 - [Configure Unavailability Check and Instructions](#)
 - [Configure General Due Date Preferences](#)
 - [Set Reviewer Due Date Preferences](#)
 - [Configure Electronic Calendar Due Date Preferences](#)
 - [Set Editor Deep Link Expiration](#)
 - [Set Enterprise Analytics Reporting Deep Link](#)
 - [Define Details Page Layouts](#)
 - [Set Update Information Deep Link Expiration](#)
 - [Create Customized Submission Flags](#)
 - [Create Customized People Flags](#)
 - [Edit Production Notes Instructions](#)
 - [Edit Alternate Contact Notes Instructions](#)
 - [Customize Author Main Menu Instructions](#)
 - [Configure Personal Classification Rankings](#)
 - [Customize Reviewer Selection Summary Instructions](#)
 - [Enable Institution Name Normalization](#)

Sample Customize Reviewer Selection Summary Instructions page

Customize Reviewer Selection Summary Instructions

Enter the custom instructions you would like Editors to see on the Reviewer Selection Summary page. Please check the text carefully, as the instructions will be immediately visible on the Reviewer Selection Summary page as soon as you click the 'Submit' button. If no instructions exist, the entire customized instructions section will be suppressed.

Page	Instructions
Reviewer Selection Summary	Insert Special Character <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;">Custom Instructions here!</div>

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.

The screenshot displays a list of permissions for the Editor role. The permissions are as follows:

- Remove Proposed Reviewers
- Select Alternate Reviewers
- Promote Alternate Reviewers
- Link/Un-link Alternate Reviewers
- Remove Alternate Reviewers
- Request Unregistered Reviewers
- Re-open Review
- Edit Reviewer Comments and Ratings after Review is Submitted
- Edit and Complete Reviews Terminated after Accepting Invitation

A green box highlights the 'Reviewer Search Options' and 'Reviewer Search Criterion' sections:

Reviewer Search Options:

- Search by Classification Matches
- Search by Personal Classifications
- Suggest Reviewers

Reviewer Search Criterion:

- People Notes
- Personal Classifications
- Personal Keywords

Below the highlighted section, there is a section for 'Editor Decisions' with a plus sign icon.

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 drop 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.

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.

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 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 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.

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](#)

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



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

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

Edit Role Definition

Role Name:*
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
 - View Transmittal Form
 - Edit Transmittal Form Fields
 - Release Transmittal Form and Source Files to Production System
 - Release Transmittal Form and Source Files to Production System after Final Disposition of Accept

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.

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.

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

New Submission

- ✓
- ✓
-
-
-
-
-
-
-
-
-
-
-
-
- ➔

Summary Following Attach Files

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

One or more required items are missing:

	Online	Offline		Online	Offline
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.

TO CONFIGURE: No configuration necessary.

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

The screenshot shows the 'Add/Edit/Remove Authors' submission step in Editorial Manager. On the left is a 'New Submission' sidebar with a list of steps: Select Article Type, Enter Title, Add/Edit/Remove Authors (highlighted), Select Section/Category, Submit Abstract, Enter Keywords, Select Classifications, Additional Information, Enter Comments, Suggest Reviewers, Oppose Reviewers, Request Editor, Select Region of Origin, and Attach Files. The main content area is titled 'Please Add, Edit, or Remove Authors' and contains instructions: 'Edited for fun! Enter the names of anyone who contributed to your submission by clicking 'Add Author'. The order of the authors may be changed by clicking the arrows. The first author of the submission may be indicated. Multiple Academic Degrees may be entered, separated by commas (M.D., PhD, JD). To change the corresponding author, enter the new corresponding author's name in the text boxes, and click the check box labeled 'Please select if this is the corresponding author'. A * indicates the field is required.' Below the instructions is a 'Current Author List' section with a '+ Add Another Author' button. The list contains one author: Mary Shelby Roman [Corresponding Author] [First Author]. Below the list is another '+ Add Another Author' button. At the bottom of the main content area are 'Previous' and 'Next' buttons.

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.

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

Enter Author Details

[Open Special Character Palette](#)

New Submission

- Select Article Type
- Enter Title
- Add/Edit/Remove Authors
- 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

Title

First Name*

Secondary First Name

Middle Name

Last Name*

Secondary Last Name

Academic Degree(s)

Secondary Academic Degree(s)

Affiliation

E-mail Address

ISNI

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

PubMed Author ID

ResearcherID

Scopus Author ID

Position

Secondary Position

Institution

Department

Secondary Institution

Secondary Department

Street Address

Secondary Street Address

City

Secondary City

State

Secondary State

Zip or Postal Code

Country

This is the corresponding author

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

- ← - 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.

PolicyManager Main Menu

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

- ⊕ Registration and Login Policies
- ⊕ Status Policies
- ⊕ Submission Policies
- ⊖ **Questionnaire Policies**
 - [Create Custom Questions](#)
 - [Create Questionnaires](#)
 - [Edit Co-Author Questionnaire Instructions](#)
- ⊕ Additional Data Policies
- ⊕ Editor Assignment Policies
- ⊕ Reviewer and Editor Form Policies
- ⊕ E-mail and Letter Policies
- ⊕ General Policies
- ⊕ Discussion Forums
- ⊕ Linked Submissions Policies
- ⊕ Conference Submission Policies
- ⊕ Transmittal Policies
- ⊕  ProduXion Manager

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)

The screenshot displays the 'Add/Edit Custom Question' page. At the top right, there is a link for 'Open Special Character Palette'. The 'Integration Options' section contains three checkboxes: 'Include in Editorial Transmittal' (checked), 'Include in Production Task Transmittal', and 'Include in Production Task Transmittal'. Below this is a 'Custom Metadata ID' field with a help icon. A note states: 'In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.' The 'PDF Cover Page' section has a 'Display' checkbox. The 'Manuscript Details' section has a 'Display' checkbox and a 'Help Text' text area. The 'Transmittal Form' section has 'Display', 'Editable', and 'Required' checkboxes, along with a 'Help Text' text area. At the bottom, there are 'Save and Close' and 'Save and Add Another Question' buttons, and links for 'Create/Edit Questionnaires' and 'Return to PolicyManager'.

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

The screenshot shows a web interface with a 'manuscript notes' section at the top, followed by an 'Additional Information' section. The 'Additional Information' section is titled 'Questionnaire Responses (Anthony Author, Corresponding Author)' and contains a list of questions and answers. The first question is a long paragraph of text with a '(more...)' link. The second question is 'Have you previously submitted your talk to a journal for publication?' with the answer 'No'. The third question is 'What kinds of pets do you have?' with the answer 'Cat'. Below 'Cat' is a long paragraph of text with a '(more...)' link. Below that is 'Something of the order Rodentia' with a sub-question 'With or without a tail?' and the answer 'Without'. Below 'Without' is a sub-question 'Hamster or capybara?' with the answer '(no response)'. Below that is a sub-question 'How many?' with the answer '3'. The interface includes 'TOP' links and 'Expand All | Collapse All' options.

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

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

The screenshot shows the 'New Submission' interface. On the left, there is a sidebar with 'New Submission' and two buttons: 'Select Article Type' (highlighted with a blue arrow) and 'Enter Title'. The main content area is titled 'Please Select an Article Type'. It contains a message: 'Please select an Article Type of 'Original Article', unless you are submitting a Letter to the Editor, or have previously contacted the publication to gain agreement to submit another type.' Below this is a dropdown menu for 'Choose Article Type' with 'Original Article' selected. A green box highlights a section containing the following text: '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 Profile with your user record here. Use the button below to go to ORCID, log into your profile there - or create one - and authorize the return of your ORCID Identifier.' Below this text is a field for 'ORCID iD: None' and a 'Link to ORCID Profile' button. At the bottom of the main content area is a 'Next' button.

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

Warning! You must submit this page to verify your contribution to the submission.

Print

[Insert Special Character](#)

Verify Contributing Authorship

If you are unable to complete your responses at this time, please click on the "Save for Later" button to save your work. To return to this page later, click on the Verify deep link in the email that you were sent regarding this submission, or save the following URL and enter it in your browser's address bar.

<http://www.editorialmanager.com/jxyz/l.asp?i=763&l=3R813TP7>

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 publication.

ORCID iD: [1234-1234-1234-123X](#) (Not Authenticated)

[Link to ORCID Profile](#)

Please respond to the questions/statements below and click on the "Submit to Publication" button to complete your Co-Author verification for the submission.

If you do not submit your responses, your contribution will not be confirmed. If you click on the "Save for Later" button, your contributing authorship will not be confirmed, but you can return to this page later to complete your responses.

Have you read the terms and conditions of submission?




Character Count: 0

Limit 2000

This part of the page is unchanged

2000 characters

Save for Later
Submit to Publication

 Editorial Manager
  Production Manager
  Commerce Manager

Confidential – Subject to change – Copyright © 2015 Aries Systems Corporation

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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

Author Parameters

Number of days Author has to Revise Submission:

Authenticated ORCID iD Request: **Optional**

Authors must suggest a minimum of Reviewers when submitting their manuscripts.

Co-Author Parameters

Register/Verify Other Authors
Co-Authors register and verify on new submission

Authenticated ORCID iD Request:

Set this value to zero if you do not want to use Revision Due Dates.

Set this to Optional to ask the Corresponding Author to retrieve and/or authorize their ORCID iD when submitting a manuscript.

This asks the author to retrieve their ORCID using a secure Authentication

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

Authors must suggest a minimum of Reviewers when submitting their manuscripts.

Co-Author Parameters

Register/Verify Other Authors
Co-Authors register and verify on new submission

Authenticated ORCID iD Request: **Optional**

Display Author Questionnaire to Co-Authors

submitting a manuscript.

This asks the author to retrieve their ORCID using a secure Authentication mechanism during Co-Author Verification. Select this box to require Co-Authors to respond to the Author Questionnaire in order to confirm contributing authorship. These settings affect any invitations generated from a submission with this article type; i.e from a Proposal or Solicited

Invited Submissions

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.

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.

Area	Instructions
Corresponding Author for Submission	<p>Insert Special Character</p> <p>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</p> <p>View Default Instructions Revert to Default Instructions</p>
Co-Author during Verification	<p>Insert Special Character</p> <p>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</p> <p>View Default Instructions Revert to Default Instructions</p>

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

Edit 'Ad Hoc From Editor' Letter

[Cancel](#) [Save](#)

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

[View Default Instructions](#) [Revert to Default Instructions](#)

Letter Purpose: Ad hoc hooray!

Subject: Ad hoc hooray! editor time

Letter Family: Ad Hoc From Editor

Editor Roles That Can Send This Letter

- None Selected
- ALL EDITOR ROLES**
- Managing Editor
- Editor
- Editor in Chief

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

Sender's E-mail Address:
 Use E-mail address of user triggering the Correspondence
 "Kristin's Journal - Editorial" <trash1@ariessc.com>
 "Kristin's Journal - Production" <trash1@ariessc.com>

Recipient:
 "Kristin's Journal - Editorial" trash1@ariessc.com
 Corresponding Editor
 Corresponding Production Editor
 Display text box so sender can insert an e-mail address
 Display the following e-mail address for the recipient:
(Multiple addresses may be entered, separated by a semicolon)

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.

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.

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

[Open Special Character Palette](#)

Integration Options

Include in Editorial Transmittal
 Include in Production Task Transmittal

Custom Metadata ID: ⓘ

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

<p>PDF Cover Page ⓘ</p> <p><input checked="" type="checkbox"/> Display</p>	<p>Manuscript Details</p> <p><input checked="" type="checkbox"/> Display</p> <p>Help Text:</p> <input type="text"/>	<p>Transmittal Form</p> <p><input checked="" type="checkbox"/> Display <input type="checkbox"/> Editable <input type="checkbox"/> Required</p> <p>Help Text:</p> <input type="text"/>
---	--	--

[Create/Edit Questionnaires](#)

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

Follow-up Question 1 [\[remove\]](#)

If user selected "Hello" in response to "Compound Question 1"

Question text:
How are you?

Instructions for Author Response:

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: List **List Type:** Radio Buttons (Allows for a single value selection; requires a default value)

When configuring the default value, please note that only the value "Please select a response" will force the author to select another answer. Any other value will count as a valid response.

Display Order	Default Value	Value	Description	
	<input checked="" type="radio"/>		Please select a response	
1	<input type="radio"/>	I'm great!		Remove Edit
2	<input type="radio"/>	I'm tired!		Edit
3	<input type="radio"/>	I'm hungry!		Remove Edit
4	<input type="radio"/>	I'm frustrated!		Remove Edit
5	<input type="radio"/>	I drank too much coffee!		Remove Edit
6	<input type="radio"/>	<input type="text"/>	<input type="text"/>	Save Item

[Update](#)

Custom Metadata ID: [?](#)

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.

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

***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:

Letter Body: [Insert Special Character](#) [Insert Custom Merge Field](#)

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

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

Description:	Task Track
Production Task Status:	Completed
Assigned To:	Ben Kweller (Proxy)
Date Assigned:	Sep 17 2014 4:24:51:737PM
Date Task Due:	Oct 29 2014 11:59:59:000PM
Completed	Sep 17 2014 4:44:13:543PM

Task Track Questionnaire Responses (Ben Kweller, Copy Editor)

Compound Question 1

Hello

How are you?

I'm tired!

Are you going to take a nap?

No

No

I'm tired!

Are you going to take a nap?

No

No

Hello

How are you?

I'm tired!

Are you going to take a nap?

No

No

I'm tired!

Are you going to take a nap?

No

No

Compound question 2

I like pie.

I like pie.

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'

Integration Options [Open Special Character Palette](#)

Include in Editorial Transmittal
 Include in Production Task Transmittal

Custom Metadata ID: [?](#)

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

PDF Cover Page [?](#)
 Display

Manuscript Details
 Display
Help Text:

Transmittal Form
 Display
 Editable
 Required
Help Text:

[Create/Edit Questionnaires](#)
[Return to PolicyManager](#)

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.

Questionnaire Options

Use Custom Questionnaire:

FTP Options

Submission Production Task Transmittal:

FTP Server address (e.g. ftp.ariessys.com):

Username:

Password:

Subdirectory:

E-mail Address (for transmittal notification):

Submission Production Task Import Profile:

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:

Add Customized Submission Flag

Cancel Submit

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On Submission Flags' and 'Turn Off Submission Flags' can display/turn off Submission Flags for any manuscript on the Submission Flags page (accessible from the Details page). The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both. If you associate this Flag with an Additional Manuscript Details (AMD) field, these Editors and Publishers can also display/turn off this Flag on pages containing that AMD field. When a flag is attached to a submission, it will be displayed next to the 'Details' action link on all pages where the 'Details' link is displayed (Editor and Publisher Roles must have permission to 'View Submission Flags').

Flag Icon: [Insert Special Character](#)

Flag Name: Maximum 256 characters

Flag Type: Editorial Production

Associate with AMD Field:


(Note: The grid of 500 flag icons is partially obscured by a green box highlighting the 'Flag Type' section.)









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.

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.

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

[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.

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

Questionnaire Options
Use Custom Questionnaire:

FTP Options
Submission Production Task Transmittal Method:
None
General Submission Production Task Export
Aries Export
ASCE Publish Ahead of Print Production Task Export
NIHMS-PubMed Central Deposit
NLM Production Task Export
NLM 3.0 Production Task Export
NLM 3.0 DTD v2 Export
Highwire PAP Export
JATS 1.0A Production Task Export
PRE-score Transmittal Production Task Export
Assignment Files

FTP Server address (e.g. ftp.ariessys.com):
Username
Password
Subdirectory:
E-mail Address (for transmittal notification):

Submission Production Task Import Profile:
E-mail Address (for import notification):
 XML file is required
Select Fields for Import

Companion File Options

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.

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. This sends 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

Edit Submission Production Task

[Insert Special Character](#)

New Production Task Name:

Maximum Production Task Name is 100 characters

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

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

Assign Automatically when Production is initiated (if this is the first task in the workflow)

Assign Automatically when previous Task is completed

End Production Automatically after this task is Completed

Automatic End Production when the Task is Completed and there are No Other Open Tasks in the Workflow.

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.

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.

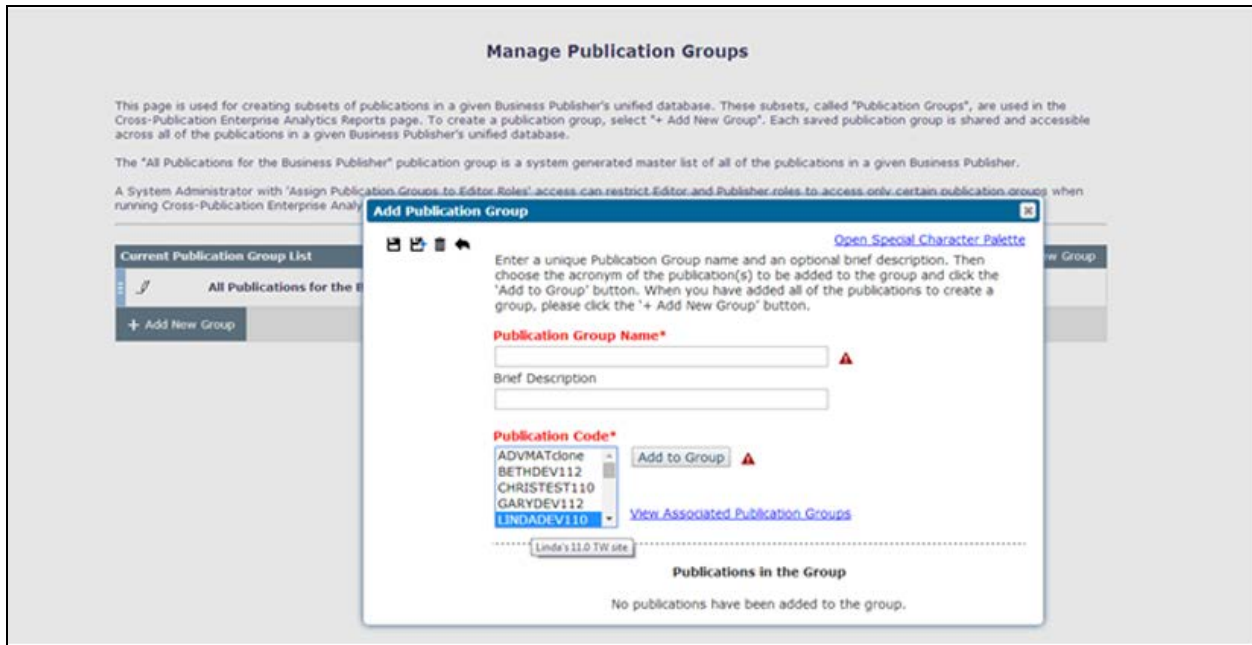
New in EM/PM version 11.2, administrators may restrict the results of Cross-Publication Enterprise Analytics Reports to a specific subset of publications. Business Publisher staff will be able to manage and assign Publication Groups as well as restrict Editor Roles to access only certain Publication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

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

The screenshot displays the 'Cross-Publication Enterprise Analytics Reporting' interface. On the left, there is a sidebar with the title 'Cross-Publication Enterprise Analytics Reporting' and a 'Create Report' link. Below this, there is a link to 'Get more help about Cross Publication Views and their contents'. A 'Publication Group:' dropdown menu is shown with options: 'All Listed Publication Groups', 'Physics Journals', and 'Medical Journals', and a 'View Publication Group Details' link. The main content area is titled 'Cross-Publication Standard Reports' and contains two sections: 'Cross-Publication Editorial Reports' and 'Cross-Publication Production Tracking Reports'. The 'Editorial Reports' section includes links for 'People and Classifications', 'People and Institutions', 'People Detail Sheet', 'People List', 'Submission Turnaround Times - Editorial', 'Submissions Received - By Article Type and Year', 'Submissions Received - by Country and Year', and 'Submissions Received - by Month and Year'. The 'Production Tracking Reports' section includes links for 'Avg Days to Complete Production Tasks in selected Timeframe' and 'Number of Submissions per Open Schedule Group'. At the bottom, there are three navigation links: 'Back to Reports Menu', 'Enterprise Analytics Reporting', and 'Editor Main Menu'.

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



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.

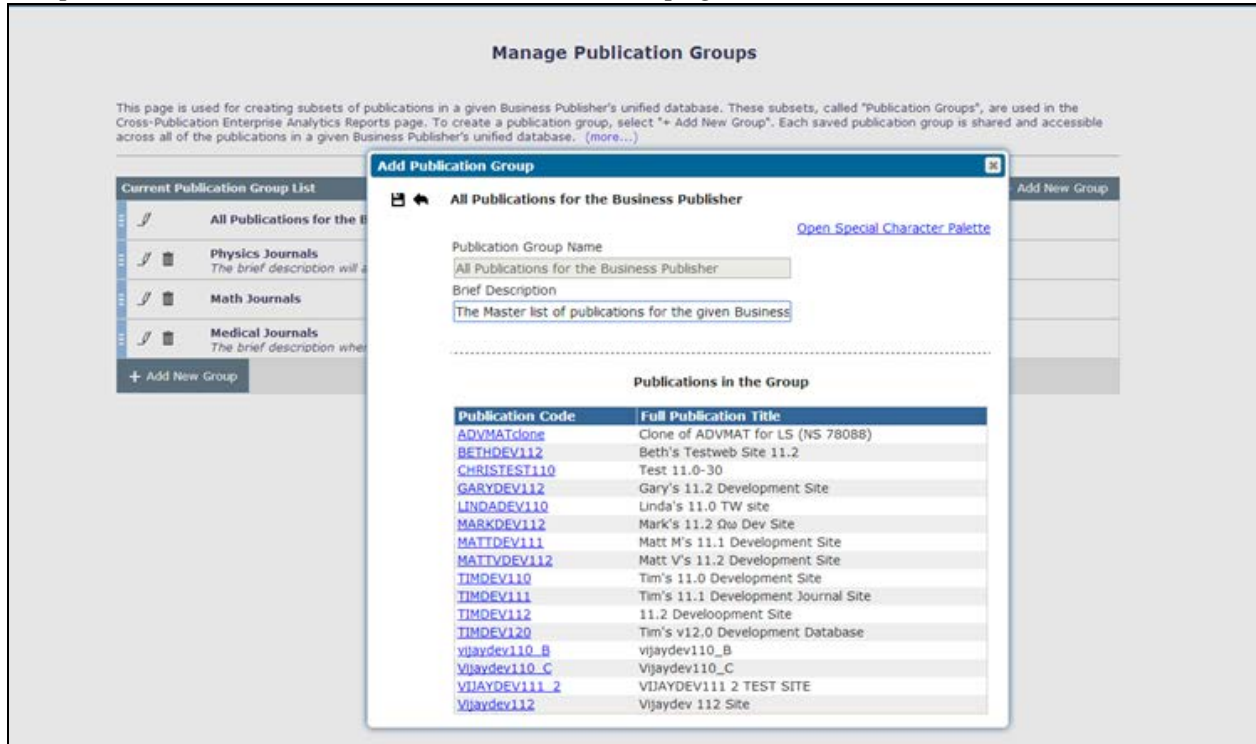
Sample Manage Publication Groups page - a Publication Group has been created



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.

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.

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

Cross-Publication Enterprise Analytics Reporting

[Create Report](#)

[Get more help about Cross Publication Views and their contents](#)

Publication Group:

- All Publications
- All Listed Publication Groups
- Physics Journals
- Math Journals
- Medical Journals

Cross-Publication Standard Reports

Cross-Publication Editorial Reports

- [People and Classifications](#)
- [People and Institutions](#)
- [People Detail Sheet](#)
- [People List](#)
- [Submission Turnaround Times - Editorial](#)
- [Submissions Received - By Article Type and Year](#)
- [Submissions Received - by Country and Year](#)
- [Submissions Received - by Month and Year](#)

Cross-Publication Production Tracking Reports

- [Avg Days to Complete Production Tasks in selected Timeframe](#)
- [Number of Submissions per Open Schedule Group](#)

[Back to Reports Menu](#)
[Enterprise Analytics Reporting](#)
[Editor Main Menu](#)

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*.

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

Configure Restricted System Administration Access Rights

There are two levels of access to System Administration

- Unrestricted Access Rights** - Editor Roles with 'System Administration Functions' enabled in RoleManager have access to all of the System Administration (RoleManger, PolicyManager, ActionManager, and AdminManager)
- Restricted Access Rights** - Editor Roles with 'System Administration Functions' enabled in RoleManager have access to the subset of System Administration features selected below. Editor Roles configure to have Restricted System Administrations Access Rights will only be able to access the functions selected (box ticked) below:

Restricted Access Rights

Check/Select the configuration options that you want all Editor Roles with Restricted Access Rights to be able to use.

- ALL OF ROLEMANAGER**

INCLUDE:

 - Assign Publication Groups to Editor Roles
- ALL OF ACTIONMANAGER**
- ALL OF ADMINMANAGER**

INCLUDE:

 - Manage Publication Groups
- ALL OF POLICYMANAGER**

Registration and Login Policies

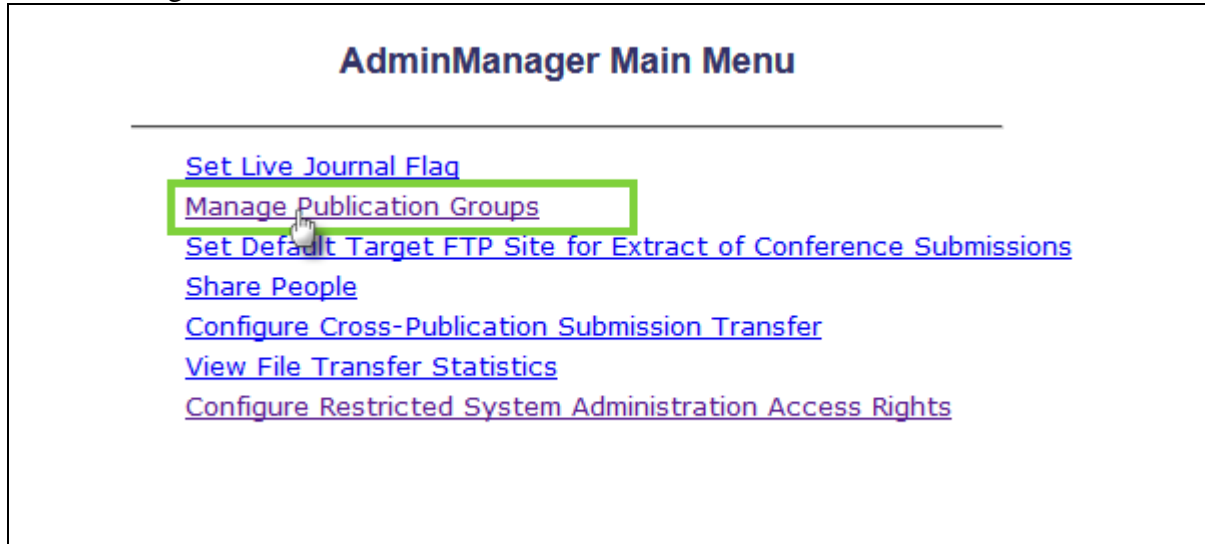
- Edit Banner URLs
- Edit Registration Fields





‘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’.

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.

Sample Add Publication Group overlay

Add Publication Group ✕

    [Open Special Character Palette](#)

Enter a unique Publication Group name and an optional brief description. Then choose the acronym of the publication(s) to be added to the group and click the 'Add to Group' button. When you have added all of the publications to create a group, please click the '+ Add New Group' button.

Publication Group Name*


Brief Description

Publication Code*

ADVMATclone	<input type="checkbox"/>
BETHDEV112	<input type="checkbox"/>
CHRISTEST110	<input type="checkbox"/>
GARYDEV112	<input type="checkbox"/>
LINDADEV110	<input type="checkbox"/>

Publications in the Group

No publications have been added to the group.

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:

Administrative and Reporting Functions

- System Administration Functions
 - Unrestricted Access
 - Restricted Access
- Produce Reports
 - Schedule Reports
 - Run Cross-Publication Custom Reports
 - Run Cross-Publication Enterprise Analytics Reports for All Publications
 - Restrict to Selected Publication Groups:
 - Tim Sub Group Even
3243424
 - Tim Sub Group Odd3
- Create Automated Reviewer Reminders
- Send Reviewer Reminders
- Send Editor Reminders
- Create Automated Author Revision Reminders
- Create Automated Author Transfer Reminders
- Send Author Reminders
- Restrict Reminder Reports to Assigned Submissions
- Search/Manage Conference Submissions
- Initiate Rebuttal
- Set Final Disposition

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.

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:

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)

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

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