Editorial Manager/ProduXion Manager
Version 16.1 BETA Release Notification

em Editorial Manager®

pm ProduXion Manager®

cm Commerce Manager

tm Task Manager

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Editorial Manager/ProduXion Manager 16.1 Beta Release Notification

General Enhancements

Batch Reassign Open Editor Assignments

When Editors leave a publication, they may still have open assignments. In previous versions of EM, there was no functionality to enable the editorial office to transfer open assignments from the departing Editor to another Editor in one batch. Reassignments had to be done for each submission individually. (Alternatively, the publication could request that Aries database administrators transfer the open assignments.) New in EM 16.1, multiple open assignments can be transferred in batches from one Editor to another or from one Editor to several other Editors.

Editors with appropriate existing RoleManager permissions will see a Transfer Editor Assignments button on the Search People – Update Information page for users with Editor roles. Users with Search People, Assign Editor, and Unassign Editor permissions can perform batch reassignments for other Editors. Users with Unassign Myself (and its sub-permission, Replace Editor) and Search People permissions can make batch reassignments from their own Search People – Update Information page.

Transfer Editor Assignments button on the Search People – Update Information page launches the new batch reassignment interface (Activity Details, Correspondence History, and Additional People Details now appear as links instead of buttons)

Clicking the button opens the Transfer Editor Assignments page. Information shown on this page depends on assignments associated with the Editor. The message "Feature is not available for this Editor" will appear when:

- The Editor has no assignments that are eligible for transfer.
- No other user has the same role as this Editor. (Assignments may only be transferred to an Editor with a matching role.)
- The Editor has saved one or more automated reminder reports. (Saved reports must be deleted before this Editor's assignments may be transferred.)

If the Editor has eligible assignments and other users have the same Editor role, the assignments are displayed in a grid and may be selected for reassignment.

Grid display allows the user to select assignments for transfer to a new Editor

The reassigning Editor selects submissions and proceeds to the Replace Editor for Selected Submissions page. This page enables the user to choose a new Editor from a drop-down list and select letters to send to both current and new Editor.

A new Letter Family (Assign/Unassign Editor for Submission Batch) and merge field are available for use when configuring letters for use with this feature. The merge field %BATCH_EDITOR_ASSIGNMENT_MS_LIST% can be used to insert a list of the submissions selected on the grid for reassignment. Letters may be customized before sending.

Both current Editor and new Editor can receive notice of batch reassignments

Editors will receive a single email containing the list of reassignments (pulled in using the new merge field). In the system, the email will be included in the Correspondence History for each submission in order to capture the Editor reassignment for the submission. An identical copy of the email will be stored for each submission in the Editor's Personal Correspondence History (even though the Editor received a single copy of the email).

TO CONFIGURE:

Existing **RoleManager** permissions are used to grant Editors access to this feature. Go to the Edit Role Definition page for the appropriate Editor role to review these permissions and enable as needed:

- Search People: Required (grants access to the Search People – Update Information page)
- Assign Editor: Required (allows the assignment to a new Editor)
- Unassign Other Editors: Required (allows the unassignment of the departing Editor)
- Replace Editor (a sub-permission of Unassign Myself): Optional (allows users to reassign their own assignments to a new Editor)

Configure letters to send to the new Editor and current Editor. In **PolicyManager** > Email and Letter Policies > Edit Letters, create letters using the new Letter Family, Assign/Unassign Editor for Submission Batch. The new merge field, %BATCH_EDITOR_ASSIGNMENT_MS_LIST%, is available for use only in this Letter Family. The merge field inserts the list of all the submissions selected in the batch being reassigned to a new Editor in the format:

Manuscript Number: 'Article Title' by Corresponding Author Name (Editorial Status)

Finally, configure elements of the user interface. **PolicyManager** > Editor Assignment Policies > Configure Batch Editor Assignment Pages.

Two default letters may be selected: one for the current Editor being unassigned and one for the new Editor being assigned. Use the drop-down menus to select default letters. (The menus display only letters configured in the Assign/Unassign Editor for Submission Batch family.)

Custom instructions may be displayed on the Replace Editor for Selected Submissions page. Use the Instructions text box to edit existing instructions or enter new instructions.

Merge Fields for Additional Manuscript Details

Publications often create Additional Manuscript Detail (AMD) fields to capture information related to submissions. Previously in EM, if Editors or editorial staff wanted to share this information, they had to copy text from an AMD field and paste it into an email. In EM 16.1, a new type of merge field is introduced. These AMD merge fields are similar to custom merge fields. They can be created by a publication to capture the description of an AMD and the entered value.

The merge field names are formatted using the merge label of the associated AMD:

- %AMD_*label*_DESC% pulls in the Field Description (as entered on the Add/Edit Additional Manuscript Detail Field page).

- %AMD_*label*_VALUE% pulls in the value for the AMD as entered in the user interface.

AMD merge fields can be used in all emails associated with a submission. They can be inserted into letter templates for all Letter Families with the exception of Batch Email. The tools for adding AMD merge fields function the same way as those for inserting system or custom merge fields. An icon (for HTML letters) or a link (for plain text letters) opens an overlay that displays all configured AMD merge fields.

Letter pages may display the option to insert AMD merge fields into the letter body:

• An icon appears in the formatting toolbar for HTML letters
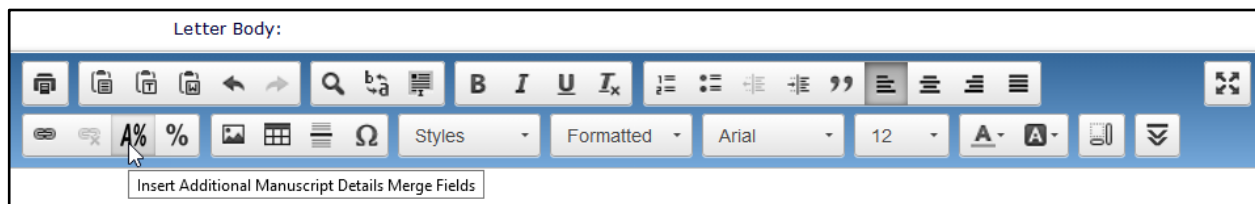
• A link appears for text letters
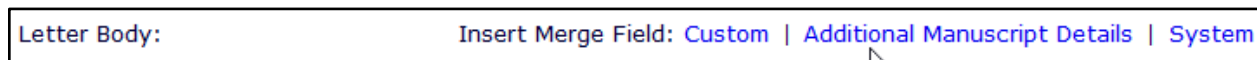
The merge fields also can be added to customized letters. When a value is present, the merge fields are populated in Preview, so the sender can view them in the context of the letter. However, they are not populated on the Customize Letter page or Open in New Window page, so that users can not change the content of the merge fields defined by the publication.

When a letter is resent from Correspondence History, any AMD merge fields that were included in the letter are not remerged. The information that was sent in the letter is displayed as the text that was originally sent. Any changes to the AMD merge field since the letter was originally sent have no effect on the letter content.

AMD merge fields may be edited at any time by a system administrator. Edits will affect only letters sent after the edits were submitted.

TO CONFIGURE:

PolicyManager > Additional Data Policies > Add/Edit Additional Manuscript Detail Fields. Add a new AMD or edit an existing one.

A new Merge Fields section is added to the configuration grid on the Add (or Edit) Additional Manuscript Detail Field page. Enter text for the merge field label; each AMD label must be unique (this label is used to create the AMD's two merge fields). Ensure that the Hide box is unchecked (so merge fields will appear in the list of AMD merge fields). Help text entered in this text box is displayed in the Insert Additional Manuscript Details Merge Field overlay.

Detail of Add Additional Manuscript Detail Field page

Page	Hide	Editable	Required	Help Text
Portion of grid removed				
schedule support			N/A	N/A
Merge Fields	☐	N/A	N/A	Merge Field Label: ⓘ *Maximum 256 alphanumeric characters and underscores allowed, no spaces.*

Once AMD merge fields are defined, they appear in the master list on the Add/Edit Additional Manuscript Detail Fields page.

Merge Fields are included in the master list of AMDs displayed on the Add/Edit Additional Manuscript Detail Fields page

Add/Edit Additional Manuscript Detail Fields

Listed below are the Additional Manuscript Detail Fields added for your journal. The values for these fields are entered manually on the Additional Manuscript Details page or the Transmittal Form, or can also be added to Custom Details Page layouts. If a Custom Flag has been configured to be Associated with an Additional Manuscript Detail field, an option to turn that Flag on or off will also appear next to the field.

[Add]

Order	Description	Merge Fields	Associated with Flag	Actions
1	Offline Materials Received	%AMD_OFFLINE_MATERIALS_DESC% %AMD_OFFLINE_MATERIALS_VALUE%		Remove Edit

Keywords Automatically Populated During Author Submission

In EM 14.1, the redesigned Author Submission Interface introduced automatic extraction of metadata (Full Title, Abstract, and Author List) during the submission process. New in EM 16.1, Keyword metadata will also be extracted during Author submission for both new and revised submissions.

Previously, the Keywords field was displayed at the General Information submission step. In order to provide the system adequate time to extract and populate the metadata, the Keywords field will now be presented as part of the Manuscript Data submission step for any Article Types configured to display the Keywords field (as either Optional or Required). Manuscript Data is the final submission step, where the Title, Abstract, and Author fields are also displayed. As with these fields, the Author may update the Keyword values in the user interface before completing the submission process.

Keywords field now displays on the Manuscript Data submission step, and the system attempts to pre-populate the field with extracted metadata

As with the other fields, the Keywords title bar will display icons, either red or yellow, to alert users as necessary. The yellow alert icon will appear when the field has been auto-populated with extracted metadata that meets the configured requirements. The yellow icon prompts the user to expand the accordion item in order to view the information. The icon displays the hover text, "The extracted Keywords require review."

The red alert icon appears on the Keywords title bar when Keywords are configured as required for the Article Type and no Keywords have been entered in the field or the entered Keywords do not meet the configured requirements. The red icon displays the hover text, "Please provide all required information and make any necessary corrections." This alert may appear under the following conditions:

- Keywords are required, but no keywords were auto-populated into the field during the extraction process.
- Keywords are required and were auto-populated, but the Author removed them, OR the Author overrode the metadata extraction process by clicking the Enter Data Manually button.
- Keywords were auto-populated but exceed the configured maximum number.

- Primary Keywords were auto-populated, but Secondary Keywords are also required. (Secondary Keywords are not automatically populated under this new functionality but must meet the configured requirements).

A publication's existing Article Type configurations for Keywords are carried over to the new display of the Keywords field. Custom instructions are retained and displayed as configured (either as text above the field's entry box or as rollover text with the information icon).

Existing configurations related to display and appearance of Keywords field are carried over to its new position in the submission interface
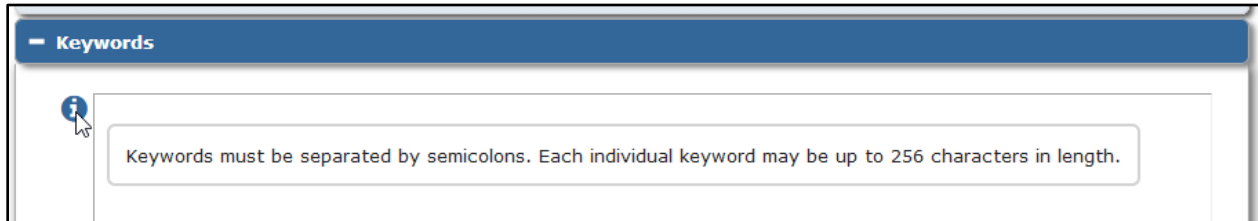
TO CONFIGURE:

No new configuration is required.

Existing configurations are carried over to the new display of the Keywords field. Article Type configurations related to the Keywords field during the submission process (Hidden, Optional, Required) are retained. Custom instructions related to the Keywords field (as entered in **PolicyManager** > Submission Policies > Edit Manuscript Submission Instructions) are retained and displayed as configured.

Assign DOIs to Individual Submission Items

The Digital Object Identifier (DOI) system is an international standard of the publishing industry. DOIs are used to uniquely identify content and to provide a persistent link to an item's location on the Internet. Usually, a publisher assigns a DOI to an item (often an article) and registers the DOI when the final version of the article is published and made available electronically.

In previous versions of EM, publications could assign DOIs only to the submission as a whole (i.e., the main submission file). New in EM version 16.1, DOIs can also be assigned to Submission Items, for example, figures and supplementary materials provided as separate files during the submission process.

Automatic assignment of a Submission Item DOI is dependent on the related Submission DOI. A Submission Item DOI is assigned at the same time as the Submission DOI and uses the next number in the DOI sequence. (Automatic DOI assignment may be configured to take place either when the Author is notified of an Accept decision or when production is initiated.) The format of the Submission Item DOI follows the rules defined for the Submission DOI.

Companion files uploaded after the Submission DOI has been assigned will automatically be assigned their Submission Item DOI at upload (when the user clicks the Proceed button on the Upload Companion Files page).

If a production task import adds a file configured for Submission Item DOI assignment after assignment of the Submission DOI, the Submission Item DOI will automatically be assigned. If the file imported by the production task replaces an existing file that has already been assigned a Submission Item DOI, the DOI is retained by the imported file.

The File Inventory page displays a Submission Item DOI column for each file. Once a Submission Item DOI has been assigned to the file, it will appear in the column. Users with permission see a Replace link for uploaded files. If a Submission Item DOI exists for the file and the user replaces the file, the new file retains the DOI.

File Inventory displays Submission Item DOI column; Editors with permission may edit the Submission Item DOI

Editor roles may be given permission to edit Submission Item DOIs.

All existing JATS Editorial Transmittal and Production Task Export methods are enhanced to include any assigned Submission Item DOIs. (Non-JATS Export Transmittal methods and all Import Transmittal methods are not changed by this enhancement.)

TO CONFIGURE:

To enable this feature, contact your Aries Account Coordinator.

A Submission Item DOI will be automatically assigned at the same time as the Submission DOI. Submission DOIs must be configured for automatic assignment (existing functionality). **PolicyManager** > ProduXion Manager > Configure Automatic DOI Assignment and select the event at which automatic DOI assignment will take place.

Configure Submission Items to be assigned DOIs. **PolicyManager** > Submission Policies > Edit Submission Items. On the Edit Submission Item Type page (for any item to be assigned a DOI), check the box next to the new setting, Assign Submission Item DOI.

A new **RoleManager** permission allow Editors to edit Submission Item DOIs. Enable the permission as applicable for each Editor role. (For more on editing automatically assigned DOIs, see the next page.)

Edit Automatically Assigned DOIs

In previous versions of EM, Digital Object Identifiers (DOIs) could be configured for either manual or automatic assignment. DOIs assigned automatically by the system could not be edited.

New in EM 16.1, RoleManager permissions allow Editors to edit automatically assigned DOIs. Three separate permissions allow Editors to edit Submission DOIs, the new Submission Item DOIs (see page 19 for details), and Preprint DOIs.

Editor roles with associated permission see an Edit link next to automatically assigned Submission DOIs, Submission Item DOIs, and Preprint DOIs

Manuscript Number:	SAMDEV161-D-19-00035
DOI:	00.0000/samdev/SAMDE [Edit]
Full Title:	Testing: Sub Item DOI

Automatically assigned Submission DOIs appear in the field as grayed out text. An Editor with the associated permission will see an Edit link next to the field. Clicking the link makes the DOI display as editable text.

Automatically assigned Submission Item DOIs may be edited only on the Edit Data pop-up window. The popup is accessible to Editors with the associated permission via an Edit Data link on the File Inventory page and the Upload Companion Files page.

Automatically assigned Preprint DOIs appear in the field as grayed out text. An Editor with the associated permission will see an Edit link next to the field. Clicking the link makes the DOI display as editable text.

TO CONFIGURE:

Go to **RoleManager** > Editor Roles. Enable any or all of the three new permissions as applicable for an Editor role:

- Edit Submission DOI Automatic Assignment
- Edit Submission Item DOI Automatic Assignment
- Edit Preprint DOI Automatic Assignment

Deep Links Disabled in Emails to Users with Other Preferred Method of Contact

With the implementation of General Data Protection Regulation (GDPR) and increased user concerns regarding account security, EM continues to introduce enhancements to personal data security.

Some users may select a means other than email as their preferred method of contact (phone, fax, etc.). For these users, system correspondence is sent to an email address designated in PolicyManager, and the handler managing that email is expected to contact the user via the preferred method. In previous versions of EM, if the email correspondence included deep links, the handler could use a deep link to log in and access the user account of the intended recipient.

New in EM 16.1, all deep links will be blinded in letters addressed to users that have a preferred method of contact set to anything other than email. The handler will not be able to access the intended recipient's account via deep links.

TO CONFIGURE:

No configuration is required.

Item Type Metadata Can Be Applied to Companion Files

In previous versions of EM/PM, publication-defined metadata fields could be assigned to **submission files** (as configured by Submission Item Types) in order to pass information about the files to the production department or automated production system. An Edit Data link enabled Authors and Editors to edit the data on the Attach Files step of the submission process.

New in EM/PM 16.1, item type metadata can also be assigned to **companion files** (i.e., files that are not built into the submission PDF). Companion files may be uploaded by the Author during submission or by an Editor (publication staff) or Publisher (production staff) later in the process.

For example, an Item Type Metadata field may be defined and used to store a figure number value for uploaded figure files. The field may be made available in the interface for a user to enter or edit the value. If so, Editors will see the editable field on the Upload Companion Files page and in an Edit Data pop-up window. The field may also be set to display to Authors in the submission interface; Authors will see the editable field and the Edit Data link on the Attach Files step of the submission process.

An Item Metadata field (e.g., Figure Number) appears as an editable text box on the Upload Companion Files page; this page also displays Edit Data links for uploaded files with associated configured Item Type Metadata

The Edit Data link for companion files appears for Editors on both the Upload Companion Files page and the File Inventory page. If the metadata is configured as Required, then the link shows as red and is marked with a red asterisk.

The File Inventory page is also enhanced to display the Edit Data link for submission files with associated configured metadata fields.

Edit Data link appears on the File Inventory page and the Upload Companion Files page; if metadata is configured as Required, the link is red and marked with an asterisk
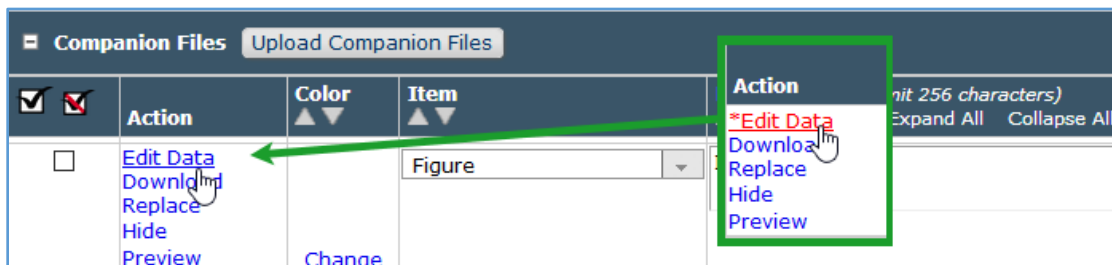
The Edit Data link opens a pop-up window where the user can edit the metadata. The pop-up window displays the companion file's Item Type, Description, File Name, Submission Item DOI (if used), and Item Type Metadata. Required fields are marked with an asterisk. A Help link (displayed wherever the editable field appears) provides access to publication-customized instructions.

Edit Data popup includes an editable field for Item Type Metadata (e.g., Figure Number)

Article Type configuration allows Authors to enter and edit Item Type Metadata fields during submission

TO CONFIGURE:

Editor roles will be allowed to edit Item Type Metadata if they have the existing **RoleManager** permission Upload, Hide and Restore Companion Files.

PolicyManager > Transmittal Policies > Add/Edit Submission Item Metadata. These pages are enhanced to allow metadata fields to be displayed on the Upload Companion Files page and on the File Inventory. Fields may be configured as Hidden, Editable, or Required.

The metadata fields may also be configured to display in the Author submission interface. **PolicyManager** > Submission Policies > Edit Article Types. On the Edit Article Type page, the Submission Item Parameters section displays any defined Item Metadata fields for each Submission Item. Use the drop-down menus (for new and revised submission) to select Required, Optional, or Hidden.

Note: Companion file metadata are not yet included in the Transmittal Form or transmitted metadata.

Production Tracking Enhancements

Enterprise View for Cross-Publication Task Handling

In the past, ProduXion Manager users with Editor or Publisher roles who work across several publications had to log in and out of several publication sites to perform their assigned tasks. New in EM/PM 16.1, for publication sites that belong to the same Business Publisher (with the same Unified Database), Enterprise View (EV) enables production staff to manage the production process across multiple publications from a single location in PM. Users can view and access tasks across multiple publication sites that belong to the same Business Publisher.

New Enterprise View Tab and Menu include a limited version of the production To-Do List, displaying links to two folders: Submission Tasks Assigned to Me and Schedule Groups Assigned to Me. It also displays links to Cross-Publication Enterprise Analytics Reporting and to Search Submissions (cross-publication) for users with associated RoleManager permissions.

New Enterprise View tab provides access to EV features for Editor and Publisher roles

In Enterprise View, the Submission Tasks Assigned to Me folder and the Schedule Group Tasks Assigned to Me folder display any submissions with tasks assigned to the logged-in user across all publications that have been configured for the user to access. On the "home" publication site (the site where the user is currently logged in) submissions display the same Action links as those displayed in the folder on the Production Tasks tab.

Submissions on a different publication site display one link in the Action column: Go to Task. Clicking this link takes the user to the corresponding folder (either Submission Tasks Assigned to Me or Schedule Groups Assigned to Me) on the publication site where that submission task was assigned, i.e. the "target" site. The user is automatically logged in to the target site, and the submission's Action column contains all available Action links.

EV assignment folders show the Publication Code for each submission, and a Go to Task link displays for tasks on other publications; clicking the link takes the user to the same EV folder on the other site (after automatic login)

Cross-publication login is configured by each individual user via the Update My Information page. This existing functionality determines what publication sites the user can access using the "Go to" drop-down menu in the top navigation bar. With Enterprise View enabled, this configuration also determines the sites available to the user in the EV folders.

Users configure cross-publication login via their own Update My Information page

The EV menu is added to the drop-down list on the Search People – Update Information page. This allows Editors with Search People permission to set a user's default login menu to Enterprise View Menu.

Enterprise View Menu is added to the options of Default Login Menu on the Search People – Update Information page

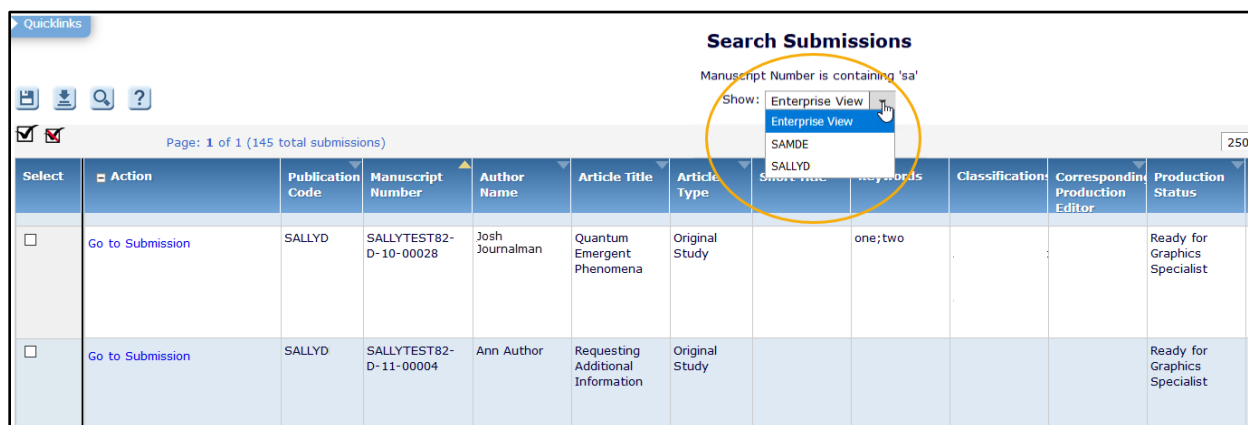## Search submissions in Enterprise View

Users with permission can search for submissions across publications with the EV submission search tool. The search tool is available via a link on the EV tab and in the "Go to" drop-down menu in the top navigation bar. The tool is a modified version of the single-publication search tool. Some important points to note:

- EV searches are executed against the Publisher's UDB, pulling from all publications the user is authorized to access (according to cross-publication login configuration). Results are returned from those publications (limited by other permissions and business rules, e.g., blinded submissions).

- For most search criteria/selector combinations, the Value column displays a simple empty textbox where the user must enter the value. (The single-publication search tool displays a drop-down list of available values for some searches; however, this would be unmanageable for cross-publication searching.) Exceptions are Discussion Status (drop-down menu displays two options: Open, Closed) and Publication Code (drop-down menu displays codes for all publications the user is authorized to access).

- EV search definitions may be saved and displayed on a user's EV Menu, but sharing EV search definitions with other users is not available at this time.

- The Search Definition drop-down list displays only EV search definitions, and the single-publication search tool does not display EV search definitions. The tools are separate.

The search results page is similar to single-publication search results:

- Tools on the search results page (Save, Download Results, etc.) are the same as those for single-publication searches.

- Submissions on the home publication site display the same Action links as those displayed for single-publication searches.

- Submissions on a different publication site display a Go to Submission link. Clicking the link takes the user directly to the submission on the target publication site, where all authorized actions can be taken.

- Results display a publication code to indicate the site where the submission was made. Results may be filtered by publication code, using the drop-down list above the results grid.

EV search results can be filtered by publication code

TO CONFIGURE:

To enable Enterprise View, contact your Aries Account Coordinator. Publication sites must belong to the same Business Publisher with a UDB.

Configure **RoleManager** for Editor and Publisher roles. A new Enterprise View section is added to the Edit Role Definition page for Editor and Publisher roles:

- Access Enterprise View Tab: Enabling this permission displays the EV tab and functionality to the user role.
- Search All Submissions in Enterprise View: Enabling this sub-permission allows users with this role to use the EV search tool. (Roles must also have existing Search All Manuscripts permission on each individual publication; EV search results will not appear for publications on which the user does not have this permission.)

Roles must also be granted two existing permissions related to cross-publication login, in order to be able to configure access to other publications (as described on page 10):

- Access 'Go To:' Publication List
- Allow Automatic Login to this Role

Preview for Uploaded Image Files

New in version 16.1, PM users can preview uploaded image files via the File Inventory. A Preview link displays for Companion files and for Submission files. The link opens a pop-up window showing the image and associated metadata.

Preview link on the File Inventory page opens a pop-up window with preview image

TO CONFIGURE:

No configuration is required.

Merge Field Enhancements

Batch Reassign Open Editor Assignments Merge Field

%BATCH_EDITOR_ASSIGNMENT_MS_LIST% inserts the list of submissions selected to be batch-reassigned to a new Editor in the format:

Manuscript Number: 'Article Title' by Corresponding Author Name (Editorial Status)

The merge field is available for use only in Assign/Unassign Editor for Submission Batch letter family.

New Merge Field Type for Additional Manuscript Details

EM 16.1 introduces new type of merge field to enable the insertion of AMD descriptions and values into system letters. See page 4.

Reporting Enhancements

Change to Editor Assignments Table

A field in the Editor Assignments Table [ROLEEDIT] has been renamed. The purpose of this change is to avoid confusion with any element of the new Batch Reassign Open Editor Assignments feature (see page 1). The Editor Assignments Table is available in General Data Export and Enterprise Analytics Reporting.

The Short Description of the field ROLEEDIT.REASSIGNED_CHAIN will now appear as "Revision Uses Previous Editor Chain." (The former description was "Assigned Using Batch Reassignment.")

New Short Description appears in Criterion drop-down list in General Data Export and in the Field drop-down list in EAR

Detail of Editor Assignments Table column headings, showing new Short Description

TO CONFIGURE:

No configuration is required. Users with reporting permissions will see the new field description.

Enhanced Equivalence Filters in XEAR Reports

For Publishers with a Unified Database (UDB), Cross-Publication Enterprise Analytics Reporting (XEAR) enables authorized users to produce reports that contain data for all publications that write to the Publisher's UDB. XEAR reports include functionality for filtering that allow a user to limit the result to be displayed. Because there is a large amount of data in a Publisher's UDB, users have found that some filter fields were slow to load in previous versions of EM. New in EM 16.1, several equivalence operators are enhanced to improve performance when using these operators to filter on Article Type Name and Production Task Name.

When the operator selected is Equals (Select), Equals (Multiple), Doesn't Equal (Select), and Doesn't Equal (Multiple), the Values column displays a list of allowable values. These allowable values are pulled from the UDB via a query. The query is modified to provide improved performance and response time when populating these lists.

TO CONFIGURE:

No configuration is required. Users with reporting permissions on a publication site using XEAR will have access to the enhanced filters.