



Aries Systems Corporation

50 High Street, Suite 21 North Andover, MA 01845 USA

PH +1 978.975.7570

Editorial Manager®/ProduXion Manager® Release Notification 21.06 (June 2021)

 Reviewer Finder Services Integration via API on page 1	Reviewer finder services can integrate with Editorial Manager via API. This feature enables Editors to search the database of a third-party service provider from within Editorial Manager. With the introduction of this feature, Clarivate's Web of Science™ Reviewer Locator is available as a service provider.
 Integration with The Charlesworth Group's WeChat Gateway on page 3	Publications can now integrate with The Charlesworth Group's WeChat Gateway. This will enable publications to pass submission status updates and other notifications to Authors who use WeChat, the Chinese multi-purpose app.
 Alternate Upload Option for Data Repositories on page 5	Data repositories may opt to allow Authors to upload files directly to the repository rather than uploading within Editorial Manager. At the Attach Files step of the submission process, EM will redirect Authors to a page within the repository's system for any repository configured for this method.
 Privacy Policy Display Enhancements on page 6	Two enhancements allow publications to customize policy information displayed. Publications can include links to terms and conditions and cookies policies in addition to the link to their privacy policy. Publications can also display custom text for the registration question that requires users to acknowledge the policies.
	Reporting Enhancements on page 8
Recommendation	EM Help will be updated with each release. Please recommend to your staff and users to clear their browser cache regularly to ensure that they are accessing the most up-to-date content.

CONFIDENTIAL AND PROPRIETARY

Copyright © 2021, Aries Systems Corporation

This document is the confidential and proprietary information of Aries Systems Corporation, and may not be disseminated or copied without the express written permission of Aries Systems Corporation. The information contained in this document is tentative, and is provided solely for planning purposes of the recipient. The features described for this software release are likely to change before the release design and content are finalized. Aries Systems Corporation assumes no liability or responsibility for decisions made by third parties based upon the contents of this document, and shall in no way be bound to performance therefore. Editorial Manager, LiXuid Manuscript, ProduXion Manager, and Commerce Manager are trademarks and the property of Aries Systems Corporation.

Reviewer Finder Services Integration via API

User role impact: EDITOR

This release introduces an API to enable integration between EM and third-party reviewer finder services. This integration will enable Editors to launch a search of the service's database from within EM and view the results on the Reviewer Selection Summary page.

With the introduction of this feature, Clarivate's Web of Science™ Reviewer Locator will be available as a service provider. A publication must have an agreement with Clarivate Web of Science. For information, see <https://clarivate.com/webofsciencegroup/solutions/reviewerlocator>.

When a reviewer finder service is enabled for a publication site, a new RoleManager permission will be displayed for Editor roles. Granting the permission will make the service available as a search option in the Reviewer Search section of the Reviewer Selection Summary page.

Detail of the Reviewer Selection Summary page: Editor role with permission will see Web of Science Reviewer Locator as an option in the Reviewer Search section.



A search launched using Web of Science Reviewer Locator will return search results in real time (within 20 seconds). The search results page will display the returned list of potential reviewer candidates (ranked by relevance score). Candidates returned by Web of Science Reviewer Locator may display a View Researcher Profile and Publications link that opens the reviewer's profile on Web of Science.

The EM system will attempt to match candidates to existing EM user records with a Reviewer role (via matching ORCID ID and/or email address). If a match is found, review statistics for the publication are displayed for the candidate. If EM identifies a matching EM user record without a Reviewer role, that information is also displayed.

Editors select reviewer candidates as with an internal search. Selected candidates who do not have an EM user record will be proxy registered by the system when an Editor clicks the Proceed button. Selected candidates will also be proxy registered when an Editor clicks the Go button in the Change Search Type section to carry out a new search.

If a candidate has previously requested anonymization (removal and erasure of a user record), the system will not proxy register that candidate. A warning message informs the Editor that the candidate cannot be proxy registered.

All candidates returned from a reviewer finder service will be listed on the Assign Reviewer Role page, including candidates who already have an EM user record. In addition to assigning Reviewer roles to new proxy-registered candidates, Editors may assign a Reviewer role to candidates who have an existing user record but do not already have a Reviewer role.

Detail of Reviewer Candidates section of search results page: Alert text (in red) provides information about the status of a candidate's EM user record. First candidate: System will initiate proxy registration for the selected candidate who is not registered on the publication. Second candidate: Matching user record found does not have a Reviewer role. Third candidate: Matching user record (with Reviewer role) found.

Select As				Reviewer	Board	Classifications	Reviewer Statistics	Invitation Statistics
Inv.	Asn.	Alt.	Prop.	Name	Member		(Agreed Invitations)	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from Web of Science Reviewer Locator: Rebecca Reviewer Institution University reviewer@test.demo	No		View Researcher Profile and Publications	
This Reviewer candidate will be proxy-registered when you click Proceed or perform another search.								
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Email Match Found in EM: Ralph Reviewer ralph@education.demo This publication: (This person does not have a Reviewer Role in this publication)	No		Reviews in Progress: 0 Completed Reviews: 0 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Portal Wide: - Last Review Completed: - Portal Wide: - Last Review Declined: - Portal Wide: - Avg Days Outstanding: 0 Manuscript Rating: 0 Avg Review Rating: 0.0 View Researcher Profile and Publications	Date Last Invited: - Portal Wide: - Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0 Terminated: 0 Total Invitations: 0
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ORCID Match Found in EM: Caroline Reviewer, MD third@reviewer.demo	No		Reviews in Progress: 0 Completed Reviews: 1 Un-assigned After Agreeing: 0 Terminated After Agreeing: 0 Last Review Agreed: - Portal Wide: -	Date Last Invited: - Portal Wide: - Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited Before Agreeing: 0

TO CONFIGURE:

To enable this feature, contact your Aries Account Coordinator.

In **RoleManager**, a new Reviewer Finder Services section is added to the Edit Role Definition page for Editor roles. Select the Web of Science Reviewer Locator checkbox to grant an editor role permission to use this service.

As additional Reviewer Finder Services are integrated with Editorial Manager and enabled for a publication, they will be listed in this Reviewer Finder Services section. Configuration and use will be the same as described above.

Detail of Edit Role Definition page for Editor roles: A new Reviewer Finder Services section will appear when a service is enabled for use by the publication.

Reviewer Finder Services:

Web of Science Reviewer Locator

Integration with The Charlesworth Group's WeChat Gateway

User role impact: AUTHOR, EDITOR

New in EM, an integration with The Charlesworth Group's WeChat Gateway platform will provide direct channels of communication between a publication's EM site and Authors who use WeChat, the Chinese multi-purpose app. The WeChat Gateway works with EM Notification Services to enable a publication's EM site to pass submission status updates and other notifications to WeChat users via the gateway.

To use the WeChat Gateway a publisher must have an official WeChat channel and a relationship with The Charlesworth Group. The Charlesworth Group can also assist in setting up WeChat accounts. For more information on WeChat Gateway, see The Charlesworth Group website:

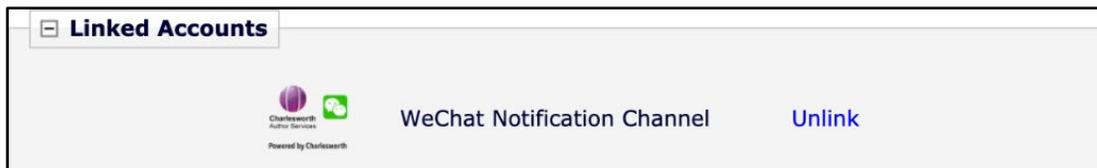
<http://www.cwrepresentation.com/WeChat>.

A WeChat user clicks on the publisher's WeChat channel to receive a QR code. Scanning the code confirms the user as a "follower" of the publisher's WeChat account (the same way a user would follow a Twitter account or Facebook page). When the confirmed follower accesses the publisher's WeChat account, the WeChat Gateway generates a page in the user's WeChat browser to display a list of publications set up by the publisher to use this feature.

To request a connection for notifications, the user selects a publication from the list. A URL landing page instructs the user to provide validation, and WeChat Gateway assigns a Channel ID (CID) that binds the user's WeChat account to the user's EM account.

The WeChat CID is stored in the EM database. The field is not editable or displayed, but users may delete the WeChat CID associated with their EM account via the Update My Information page. Editor roles may also be granted permission to delete WeChat CIDs via the Search People – Update Information page.

Detail of Update My Information page: Linked Accounts section will display an Unlink link to allow the user and Editors with RoleManager permission to delete the associated CID.



Note: A WeChat user will have a unique WeChat CID for each EM publication. Therefore, WeChat CIDs will not be propagated across IJRS-linked (people-sharing) sites. However, if the people-sharing group is configured so that the inactivation of a user record on one site is propagated across the other sites, the WeChat CIDs on all sites will be deleted when the user record is inactivated.

For the user interactions on WeChat, a Login Validation page provides guidance and error messaging. This is separate from the publication's EM site.

TO CONFIGURE:

Contact your Aries Account Coordinator to enable this feature.

Configure endpoints to receive notifications and the set workflow events to trigger notifications. Endpoint URLs will be provided by Charlesworth.

Go to **AdminManager** > Configure Endpoints for Notification Services. Create endpoints:

1. Click Create New Endpoint button.
2. Enter a name and a URL (provided by Charlesworth).
3. Only send notifications if corresponding author has a WeChat Notification Channel ID: Check the box next to this setting.

Add Endpoint pop-up window features new checkbox setting for WeChat notifications (when this feature is enabled).

Add Endpoint

Enter the name and URL of the endpoint that you would like to configure to receive Notification Services. Once the endpoint is configured, it can be associated with one or more events on the Configure Notification Services page.

Name:

URL:

Only send notifications if corresponding author has a WeChat Notification Channel ID

Go to **AdminManager** > Configure Notification Services. This page lists all events that can be used to trigger a notification. For each event that should trigger notification:

1. Click the Add New Endpoint link.
2. Select the appropriate endpoint.

Portion of Configure Notification Services page: Select Endpoint pop-up window opens from Add New Endpoint link.

Event	Endpoints Notified
Accept	Example endpoint (Remove) Add New Endpoint
Accept with Minor Revision	
Minor Revision	
Major Revision	
Reject	
Reject and Transfer	
Reject and Transfer - Plagiarism	
Reject - Plagiarism	
Revise (Hidden)	
Final Disposition	
Final Disposition	
Final Disposition	

Select Endpoint

Select the Endpoint that will receive a notification for this event.

(select) ▾

Grant permission to appropriate Editor roles. Go to **RoleManager** > Editor Roles. The new permission appears in the Viewing and Editing People Data section:

- Delete WeChat Notification Channel ID: Editors with this permission can unlink a user's WeChat CID via Search People – Update Information page. (Editor role must also have the parent permission, Search People.)



Alternate Upload Option for Data Repositories

User role impact: AUTHOR, EDITOR

Editorial Manager 17.0 introduced functionality to enable the integration of data repositories via API. The feature allows Authors to upload files to repositories from the Attach Files page during the submission process. Authors can also update the metadata and files deposited to those repositories from within EM.

An enhancement to this feature introduces an alternate method for data repositories to integrate with EM. When a repository is configured with this new integration, the submission process will redirect Authors to an upload page within the repository, instead of passing files and metadata from EM through the API.

The configuration of a repository's integration with EM will affect what the Author experiences during the submission process. This table compares the two upload processes.

Upload in EM (sent to repository via API)	Upload directly to repository via API
1. Author selects the repository from the drop-down list on the Attach Files page.	1. Author selects the repository from the drop-down list on the Attach Files page.
2. Go to Upload Page button is displayed.	2. Create Deposit and Go to Upload Page button is displayed.
3. Clicking button opens the Upload Files to Repository pop-up window in EM.	3. Clicking button opens pop-up alert in EM to inform Author that this option will redirect to an upload page within the repository. Author may proceed or cancel.
4. Author can upload multiple files in the same deposit. (Uploading a file on this pop-up page will trigger an API call to the repository to create the deposit and send the file and metadata to the repository.)	4. Clicking Proceed opens the Upload Files to Repository pop-up window displaying the repository's user interface. Author must follow instructions on how to upload a file to the repository.

TO CONFIGURE:

Publication configuration for data repository integration via API is detailed in Editorial Manager/ProduXion Manager Version 17.0 General Release Notification. No new configuration at the publication level is required for this option.

Privacy Policy Display Enhancements

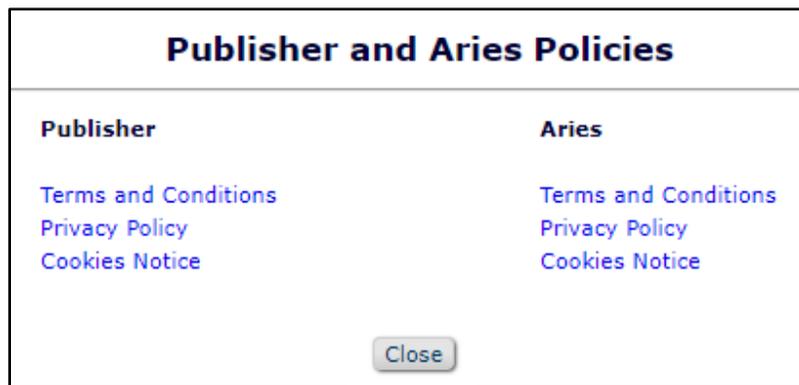
User role impact: ALL USERS

Two enhancements enable publications to customize the display of privacy policy information.

Custom Terms & Conditions and Cookies Notice links

A pop-up window accessed via the Privacy link in the main navigation displays links to the privacy policies of the Publisher and Aries. New in EM, the pop-up window can also include links to the Publisher's terms and conditions and cookies notice information.

Publisher and Aries Policies pop-up window: When configured to display, Links for Terms and Conditions and Cookies Notice will appear in the Publisher column.



Custom privacy policies question text

During registration, users are required to acknowledge the privacy policies of both the Publisher and Aries. They are presented with a required registration question that links to both policies. The question is also displayed to users at login if they bypass the registration process (i.e., users who were proxy registered or who were registered before the question was added). EM displays standard text for the question and related instructions.

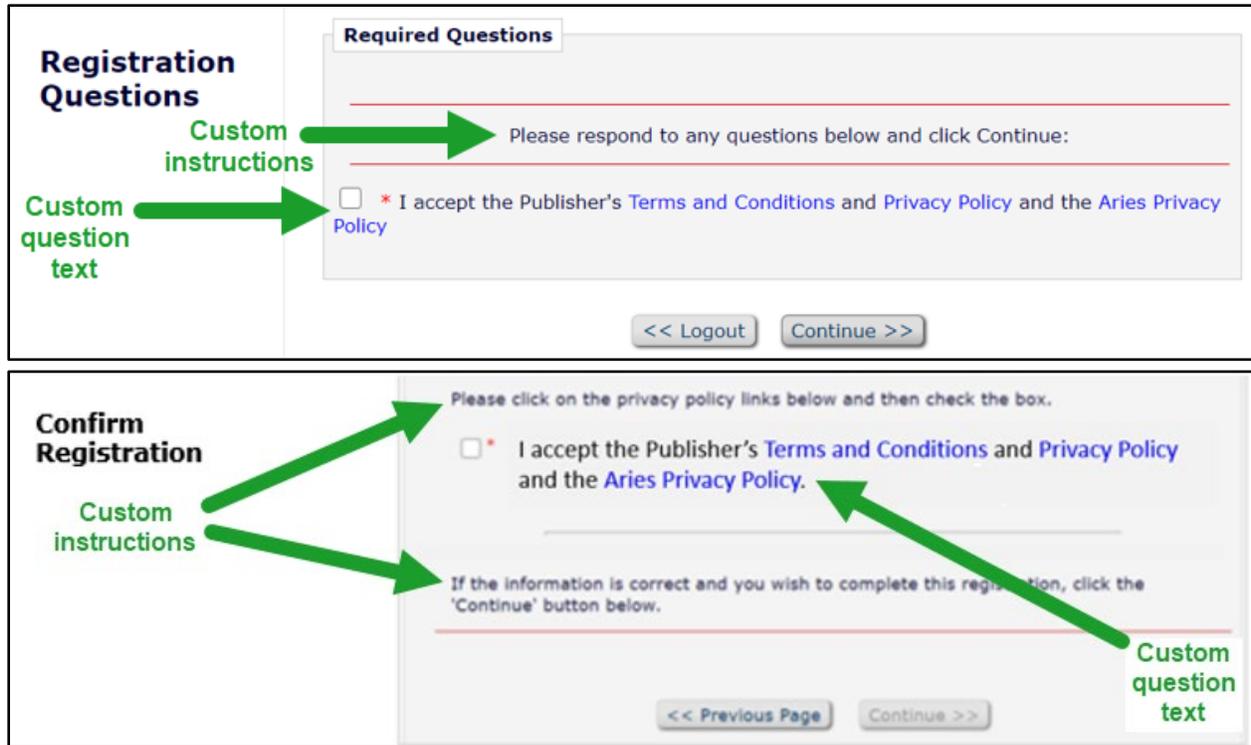
New in EM, publications can display custom text for both the privacy policy question and instructions. When a custom privacy policy question is activated, it displays on the registration and login pages, and any previous privacy policy question deactivated. Users will be required to respond to the new question, even if they responded to a previous one.

All privacy policy questions answered by a user and the date of the response will display on Update My Information and Search People – Update Information pages. A record of the privacy policy questions that a user has answered also displays on the Merge Duplicate Users – Verify Data page.

A new Custom Privacy Question History table records data on user responses. A Privacy Question Type field is also added to the existing Registration Questions table to identify the type of question used during registration (standard or custom).

In PolicyManager, privacy policy questions (standard and custom) appear as read-only/required/forced on the Create Registration Questions page. Any previous privacy policy questions are shown as hidden (below the list of active questions).

Detail of the Registration Questions page and Confirm Registration page: Custom instructions and a custom privacy policy question may be configured to display in place of the existing instructions and question.



TO CONFIGURE:

To configure either of these features, contact your Aries Account Coordinator.



Reporting Enhancements

Custom Privacy Question History Table

A **Custom Privacy Question History** table is added to General Data Export and Enterprise Analytics Reporting (EAR). This table lists the date, time and IP Address when a user answers a custom Required/Forced privacy policies registration question created by the publication.

TO CONFIGURE:

No configuration is necessary. Users with reporting permissions will see the new table in General Data Export. Users with applicable reporting permissions on a publication using EAR will also have access to the new table in EAR.

