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Editorial Manager®/ProduXion Manager® Release Notification 24.09 (September 2024)

em **pm** **Letter Template Subject Line Restriction** *on page 2*	The Add/Edit Letter page in PolicyManager is enhanced to prevent system administrators from saving any letter template with a blank subject line. This will help prevent EM/PM system emails from being blocked or sent to a spam folder by email client systems.
em **Past Assignments Data Added to Initiate Discussion Page** *on page 3*	The editor grid on the Initiate Discussion page is enhanced to include the number of past assignments for each Editor in a defined time span.
em **New Editor Reminder and Status Reports** *on page 4*	Two new reports are introduced to enable Editors (or the editorial office) to track the status of required reviews completed for submissions and to send ad hoc and automatic reminders to Editors responsible for inviting or assigning Reviewers.
em **Direct-to-Editor "Send Back to Author" Enhancement** *on page 5*	This enhancement enables the first-assigned Editor in a direct-to-editor workflow to send a submission back to the Author from the New Assignments folder.
em **Automatic Set Final Disposition Enhancement** *on page 6*	This enhancement allows the automatic setting of Final Disposition – Withdrawn for new submissions that have been sent back to the Author, and the Author has taken no further action on them for a defined period.
	Reporting Enhancements *on page 7*
	Information on current integrations: *Manuscript analysis services* *Repositories*

Letter Template Subject Line Restriction

**User role impact: SYSTEM ADMINISTRATOR**

Email that is sent without a subject line may be blocked or sent to a spam folder by email client systems, or a client system may report Editorial Manager to our email service provider. Additionally, email recipients may register a complaint with Editorial Manager's email service provider.

In order to ensure that emails sent from EM and PM have subject lines, the system will prevent system administrators from saving any letter template with a blank subject line when adding or editing letter templates in PolicyManager.

The system will display an alert message when a user clicks Save on the Add/Edit Letter page if the Subject field is blank. A letter purpose is already required for each letter template. New in this release, a letter subject will also be required and, if not provided, the letter template will not be saved.

This restriction applies to all letter families.

A new alert message appears when a user attempts to save a letter template without entering text in the Subject field.
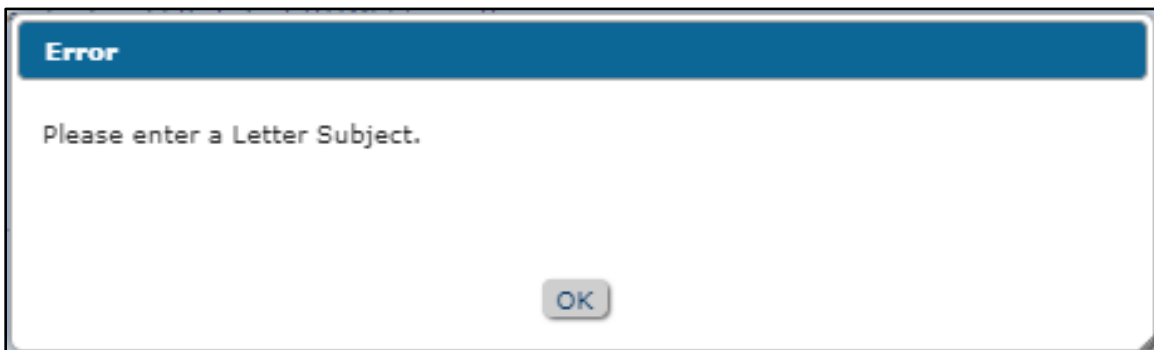
TO CONFIGURE:

No configuration is required.

Note: This enhancement will not change any subject lines stored with existing letter templates. Publications should examine their letter templates and correct any with missing subject lines.

em Editorial Manager®

Past Assignments Data Added to Initiate Discussion Page

User role impact: EDITOR

A grid on various pages provides information about the Editors listed, including classification matches (between the Editor and submission), upcoming availability, and number of current assignments. This grid is enhanced on the Initiate Discussion page with a new column to display the number of past assignments an Editor has handled during a defined time span. The updated grid will also appear on the Add Participants to Discussion page.

Detail of Initiate Discussion page: New column, Past Assignments for the last X days, is added to Editor grid. A system administrator can define the number of days used in the calculation.

Select	Editor Role	Editor Description	Editor Name	Current Assignments	View Reviews and Comments	Download Files(source and companion)	View Draft Decision Letter	# Classification Matches	Classification Matches	Available during next 20 days	Past Assignments for the last 30 days
☐	Assistant Editor		Anthony Author ⚑	0	☐	☐	☐	0		Yes	0
☐	Assistant Editor		Lois Lane, PhD ⚑	0	☐	☐	☐	0		Yes	0
☐	Managing Editor		Emily Editor ⚑	0	☐	☐	☐	0		Yes	0
☐	Managing Editor		Ralph Reviewer ⚑	0	☐	☐	☐	0		Yes	0

TO CONFIGURE:

Go to **PolicyManager** > Submission Policies > Set Request Editor or Assign Editor Display Options.

- Number of days to calculate Past Assignments: Enter the desired number of days to be used in the calculation. The default number is 90. This setting applies to all pages where the column appears.

New Editor Reminder and Status Reports

User role impact: EDITOR

Two new reports are added to the Reports menu and Send Reminder Letters page to enable users with permission to track the status of required reviews completed for submissions and to send reminders to Handling Editors responsible for inviting or assigning Reviewers. Both new reports allow users with permission to send ad hoc and scheduled reminders to the Handling Editor when some action needs to be taken on the submission (e.g., invite additional Reviewers, make a decision).

Editor Required Reviews Status Report

The Editor Required Reviews Status Report provides information on the status of Reviewer invitations and required reviews for assigned submissions. The report can be filtered by Editor Role, Article Type, Document Status, and Submission Flags. Parameters can also be defined by number of reviews (in progress, completed), number of Reviewers (invited, agreed), number of required reviews remaining, and number of days since the last Reviewer invitation.

Results are displayed in a table with a Send Reminder column, enabling the user to send reminder letters from the report page to Handling Editors who may need to invite or assign additional Reviewers to obtain the required number of reviews.

Automated Editor Required Reviews Reminder Report

The Automated Editor Required Reviews Reminder Report enables users to set up a report that runs nightly to automatically send reminders to Handling Editors, based on the pre-configured criteria.

The report can be used to define four reminder types:

- Handling Editor assigned/agreed, no Reviewers assigned (for a defined number of days)
- Handling Editor assigned/agreed, insufficient Reviewers assigned (for a defined number of days since the most recent Reviewer invitation or decline response)
- Handling Editor assigned/agreed, required reviews complete (for a defined number of days since the last Document Status change)
- Handling Editor assigned/agreed, decision in progress (for a defined number of days that the decision has been In Progress)

Reminder types can be further refined based on Editor Role, Article Type, and Submission Flag.

Defined automated reminder must be saved, named, and linked to a letter template in the Editor Reminder family. Saved reminders can be edited and deleted by the user who created them.

The system sends an email reminder for each submission that meets the defined criteria.

TO CONFIGURE:

Go to **RoleManager** > Editor Roles and select the applicable roles. Existing permissions provide access to the Editor Required Reviews Status Report. Role must have one or the other:

- Produce Reports (enables the report link on the Reports page and Send Reminder Letters page)
- Send Editor Reminders (enables the report link on the Send Reminder Letters page)

A new permission provides access to the Automated Editor Required Reviewers Reminder Report:

- Create Automated Editor Required Reviews Reminders

Direct-to-Editor "Send Back to Author" Enhancement

User role impact: EDITOR

The Direct-to-Editor (Autonomous Editor) feature allows publications to push submissions to an individual Editor, bypassing the New Submissions Requiring Assignment folder. This feature is useful both for smaller publications that do not have a central editorial office and for larger publications that have a large pool of Editors.

Editors may receive the submissions in the Direct-to-Editor folder where they assign themselves. Alternatively, the publication may configure automatic assignment of direct-to-editor submissions, and Editors receive them in the New Assignments folder.

Editors have access to a link in Direct-to-Editor folders to send a submission back to the Author (e.g., for corrections) before the submission enters the peer review workflow.

This enhancement enables the Send Back to Author link in the New Assignments folder for new direct-to-editor submissions that have been automatically assigned to the Editor. The link will appear only when the automatic assignment option for direct-to-editor submissions is enabled (configured on **PolicyManager** > Set Editor Assignment Options).

The Send Back to Author link is available in the New Assignments folder only when the Editor has taken no other action on the submission. The link will not appear if the Editor has taken action with any of the following links:

- Invite Reviewers
- Solicit Commentary
- Submit Editor's Decision and Comments.

TO CONFIGURE:

No new configuration is required.

Automatic Set Final Disposition Enhancement

User role impact: SYSTEM ADMINISTRATOR

Setting final disposition is an administrative task typically done after a submission has finished the editorial process and has been accepted, rejected, withdrawn, or transferred. In some cases, final disposition may be set before the editorial process is completed.

The final disposition of Withdrawn may be used at any time, such as when an Author requests withdrawal or decides not to submit a revision. EM allows publications to configure the system to set final disposition to Withdrawn automatically for revised submissions that an Author has declined to revise or has not taken action on for a defined period of time.

This enhancement introduces the option to configure the system to set final disposition to Withdrawn automatically for new submissions that have been sent back to the Author, and the Author taken no further action on the submission for a defined period of time.

The related PolicyManager page, Configure Automatic Withdrawal of Inactive and Declined Revisions, is renamed to Configure Automatic Withdrawal for Inactive Submissions and Declined Revisions, and the new configuration option is added to this page.

Detail of Configure Automatic Withdrawal for Inactive Submissions and Declined Revisions page showing new settings for new submissions sent back to the Author.

TO CONFIGURE:

Go to **PolicyManager** > Editor Decision Policies > Configure Automatic Withdrawal of Inactive Submissions and Declined Revisions. Select the checkbox for the new setting, Automatically Set the Final Disposition to Withdrawn if the Author does not approve a submission that has been sent back within [ ] days. Enter the desired number of days in the text box.

When this option is enabled, submissions that meet the defined limit will have final disposition set to Withdrawn as part of a nightly batch process. If this option is not enabled, submissions remain in the Submissions Sent Back to the Author for Approval folder (on Editor main menus) until the Author takes action or the final disposition is manually set to withdrawn.

Reporting Enhancements

Changes to Field Names in Enterprise Analytics Reporting Tables

As part of the ongoing work to make naming clearer and more consistent in reporting tools and Database Content Help popups, the fields listed below have been renamed.

The new names will appear in the Field drop-down list in EAR reports. These names will also populate the Description text box when a user creates a new report or adds the field to an existing report. Any user-entered text in the Description text box will be retained when a user edits an existing report.

Reviewer Roles table

- Downloadable Submission Item [REVIEWERROLE.DFILETYPEID]: Previously, this field was named "Submission Item Type that Reviewer can Download."
- Reviewer Role ID [REVIEWERROLE.REVIEWERROLEID]: Previously, this field was named "Unique Reviewer Role ID."

Publisher Roles table

- Assign Schedule Group Production Tasks [PUBLISHERROLE.ASSIGN_SG_PRODUCTION_TASK]: Previously, this field was named "Can assign Schedule Grouop Production Tasks."
- Be Corresponding Production Editor [PUBLISHERROLE.CAN_BE_CORR_PROD_ED]: Previously, this field was named "Can be Corresponding Production Editor."
- Edit Production Notes [PUBLISHERROLE.EDIT_PRODUCTION_NOTES_ON_MANU_DETAILS]: Previously, this field was named "Edit Production Notes on Manuscript Details."
- Editorial Details Layout ID [PUBLISHERROLE.EDITORIAL_LAYOUT_ID]: Previously, this field was named "The editorial layout id used by the publisher role."
- Initiate Similarity Check [PUBLISHERROLE.CAN_INITIATE_CROSSCHECK]: Previously, this field was named "Can Initiate Similarity Check."
- Manage Companion Files [PUBLISHERROLE.UPLOAD_REMOVE_COMPANION_FILES]: Previously, this field was named "Upload/Remove Companion Files."
- Override Schedule Group Task Due Dates [PUBLISHERROLE.OVERRIDE_SG_PRODUCTION_TASK_DUE_DATE]: Previously, this field was named "Can override Schedule Group Task Due Dates."
- Production Details Layout ID [PUBLISHERROLE.PRODUCTION_LAYOUT_ID]: Previously, this field was named "The production layout id used by the publisher role."
- Publisher Role ID [PUBLISHERROLE.PUBLISHERROLEID]: Previously, this field was named "Unique Publisher Role ID."
- Publisher Role Name [PUBLISHERROLE.NAME]: Previously, this field was named "Publisher Role."
- Turn Off Submission Flags [PUBLISHERROLE.TURN_OFF_SUBMISSION_FLAGS]: Previously, this field was named "Turn Off Custom Flags."
- Turn On Submission Flags [PUBLISHERROLE.TURN_ON_SUBMISSION_FLAGS]: Previously, this field was named "Turn Off Custom Flags."
- View All Accepted Submissions [PUBLISHERROLE.VIEW_ALL_ACCEPTED_SUBMISSIONS]: Previously, this field was named "View All Accepted Submissions Flag."
- View At-Risk Submissions PUBLISHERROLE.CAN_VIEW_AT_RISK_SUBMISSIONS: Previously, this field was named "Can this publisher view at-risk submissions?"
- View Linked Submission Groups [PUBLISHERROLE.CAN_VIEW_LINKED_SUBMISSION_GROUPS]: Previously, this field was named "Can view Linked Submission groups."
- View Production Correspondence History [PUBLISHERROLE.VIEW_PRODUCTION_CORR_HISTORY]: Previously, this field was named "View Production Tracking Correspondence History."
- View Production Notes [PUBLISHERROLE.VIEW_PRODUCTION_NOTES_ON_MANU_DETAILS: Previously, this field was named "View Production Notes on Manuscript Details."
- View Schedule Group Task Assignment History [PUBLISHERROLE.VIEW_SG_PRODUCTION_TASK_ASSIGNMENT_HISTORY]: Previously, this field was named "Can view Schedule Group Task Assignment History."

- View Schedule Group Task Correspondence History [PUBLISHERROLE.VIEW_SG_PRODUCTION_TASK_CORR_HISTORY]: Previously, this field was named "Can view Schedule Group Task Correspondence History."
- View Submission Flags [PUBLISHERROLE.VIEW_SUBMISSION_FLAGS]: Previously, this field was named "View Custom Flags."
- View Task Assignment History [PUBLISHERROLE.VIEW_PRODUCTION_TASK_ASSIGNMENT_HISTORY]: Previously, this field was named "View Production Status History."

Technical Check History table

- Technical Check History ID [TECH_CHECK_HISTORY.TECH_CHECK_HIST_ID]: Previously, this field was named "Unique Technical Check History ID."

New names will appear in the Field drop-down list in EAR. New names will populate the Description text box when the field is added to a new or existing report (top image). User-entered Description text is not overwritten in existing reports.
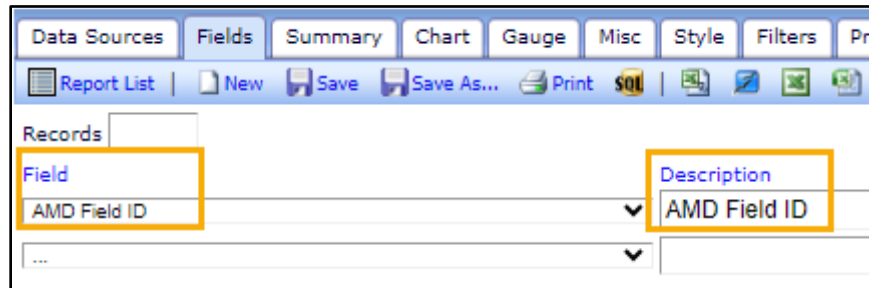
These changes also apply to General Data Export. The new field names appear in the Criterion drop-down list on the General Data Export page where a user defines the criteria for the data export. These names also appear as column headers on the results page.

TO CONFIGURE:

No configuration is necessary. Users with related reporting permissions will see the updated field names.

General Data Export Changes to Field Names

As part of an initiative to provide consistency of naming and more accurate descriptions of data displayed, the following changes have been made. These changes apply only to General Data Export (the tables and fields do not appear in Enterprise Analytics Reporting).

Field name changes

These new field names appear in the Criterion drop-down list on the General Data Export page where a user defines the criteria for the data export. These names also appear as column headers on the results page. New field names and associated database names are listed below.

One field in the Allowed Publication Groups table has been renamed.

- Editor Role ID [ALLOWED_XEAR_PUB_GROUPS.EDITORROLEID]

Two fields in the Editor Assignment Chain Steps table have been renamed.

- Editor Role ID [EDITOR_ASSIGNMENT_CHAIN_TEMPLATE_STEPS.EDITORROLEID]
- Letter ID [EDITOR_ASSIGNMENT_CHAIN_TEMPLATE_STEPS.LETTERID]

One field in the Editor Assignment Chain Templates table has been renamed.

- Editor Chain Template Name [EDITOR_ASSIGNMENT_CHAIN_TEMPLATES.DESCRIPTION]

Three fields in the Letter Template Access for Editor Roles table have been renamed.

- Editor Role ID [LETTER_EDITOR_ROLES.EDITORROLEID]
- Letter ID [LETTER_EDITOR_ROLES.LETTERID]
- Letter Template Access for Editor Role ID [LETTER_EDITOR_ROLES.LETTER_ROLE_ID]

Three fields in the Letter Template Access for Publisher Roles table have been renamed.

- Letter ID [LETTER_PUBLISHER_ROLES.LETTERID]
- Letter Template Access for Publisher Role ID [LETTER_PUBLISHER_ROLES.LETTER_ROLE_ID]
- Publisher Role ID [LETTER_PUBLISHER_ROLES.PUBLISHERROLEID]

Two fields in the Reviewer Finder Service Permissions table have been renamed.

- Editor Role ID [REVIEWER_RECOMMENDATION_PERMISSIONS.EDITORROLEID]
- Reviewer Finder Service Permission ID [REVIEWER_RECOMMENDATION_PERMISSIONS.REVIEWER_RECOMMENDATION_PERMISSION_ID]

Three fields in the View Submission Options table have been renamed.

- Article Type ID [VIEW_SUBMISSION_OPTIONS.DCATEGOID]
- Editor Role ID [VIEW_SUBMISSION_OPTIONS.EDITORROLEID]
- Role Family [VIEW_SUBMISSION_OPTIONS.ROLE_FAMILY]

Additional information about these tables and fields is available in Database Content Help pop-up windows accessed via links on reporting pages in Editorial Manager.

TO CONFIGURE:

No configuration is necessary. Users with related reporting permissions will see the updated field names.