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Editorial Manager®/ProduXion Manager® Release Notification 24.10 (October 2024)

 User Exclusion from Batch Email Separated from Batch Reminders on page 2	The Search People – Update Information page is enhanced to provide two separate settings to exclude people from emails sent via Batch Email functionality and to exclude them from batch reminders sent via reminder reports.
 New Merge Fields for Discussion Forum Emails on page 3	Two new merge fields are added for communicating information from discussion forums to Editor participants.
 Email Functionality Enhancement on page 4	Pages in EM and PM where email messages can be saved or sent manually are enhanced to prevent the saving or sending of an email with a blank subject line. This will prevent emails being treated as spam by the receiving systems. Eight pages are enhanced for this release.
 Adobe Analytics Enhancement for Submission Process on page 5	Adobe Analytics can now identify whether Authors are interacting with the pages shown during the submission process and providing the required information at the relevant step.
 Manuscript Analysis API Enhancement on page 6	The existing Manuscript Analysis Services API has been enhanced to include three additional data elements, which will allow the services to customize results shown to the requesting user based on the EM workflow stage when the user accessed the results.
	Reporting Enhancements on page 7
	Information on current integrations: Manuscript analysis services Repositories

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User Exclusion from Batch Email Separated from Batch Reminders

User role impact: ALL

The Search People – Update Information page is enhanced to provide two separate settings to exclude people from emails sent via Batch Email functionality and to exclude them from batch reminders sent via reminder reports. Previously, one setting governed both functions.

Upon release, the preexisting setting will be applied to the two new settings as follows:

- If the preexisting setting was “Always,” both new settings will be “Always.”
- If the preexisting setting was “When Unavailable Dates are active,” the batch reminder exclusion setting will be “When Unavailable Dates are active” and the mass email exclusion setting will be “Always.”

Detail of Search People – Update Information page: Two new settings appear in the left column. The first determines the conditions for excluding the account holder from receiving batch reminder emails sent via reminder reports. The second determines the conditions for excluding the account holder from receiving mass emails sent via the Batch Email tool.

Exclude this user from receiving batch reminder emails:

Never

When Unavailable Dates are active

Always

Exclude this user from receiving mass emails (sent via Batch Email tool):

Never

Always

(Enabled by Mary Mary, Managing Editor, 14 Aug 2024)

TO CONFIGURE:

No system configuration is required. Editor roles with Search People permission will see the new settings upon release.



New Merge Fields for Discussion Forum Emails

User role impact: EDITOR

Two new merge fields are introduced for communicating information from discussion forums. These merge fields may be used with both Editor and Reviewer discussion forums, but they will populate only in emails to Editor participants.

These merge fields may be used in invitations to join a discussion, automatic notifications of discussion posts, and in letters sent via the [Send Email](#) link in the participants grid on the Discussions page.

With existing configurations, letters containing these merge fields can be sent automatically to Editors when a discussion is initiated and/or when new comments are posted.

Merge field details

%ALL_DISCUSSION_POSTS% inserts all posts associated with the current discussion thread. They are displayed in the order they were posted, oldest on top. For HTML emails, posts appear in a three-column table displaying the full name of the poster, timestamp of the post, and text of the post. For plain text emails, each of the three items appears on a separate line with a blank line between posts.

%DISCUSSION_PARTICIPANTS% inserts a list of all participants associated with the current discussion thread. For Editor discussions, the participant list displays Editor name, role, number of posts, and participation status. For Reviewer discussions, Editor and Reviewer participants are listed separately.

For each participant, the following is displayed: full name, role, number of posts in the current discussion thread, timestamp of the latest post in the publication-configured date format, and whether the participant is active in the current discussion thread. The Reviewer number is included for Reviewers. For HTML letters, these are put into a table. For plain text emails, each item is displayed on a separate row with a label and a blank line between participants.

TO CONFIGURE:

Add merge fields as desired to letter templates. Go to **PolicyManager** > Email and Letters Policies > Edit Letters. Use the Discussion Forum letter family.

As needed, associate letter templates to discussion templates (PolicyManager > Configure Discussion Topic Templates) and set automatic discussion initiation (PolicyManager > Configure Automatic Discussion Initiation).



Email Functionality Enhancement

User role impact: ALL

In order to prevent emails sent from EM and PM being treated as spam, the system will alert users who attempt to save or send an email that does not include text in the subject line. This enhancement is applied to the following pages for this release.:

- Customize Letter: Available to users from multiple workflows after they select a letter template for the related purpose (e.g., assigning an Editor, sending letters associated with a reminder report) and opt to customize it.
- Customize [Ad hoc] Letter: Available to users from the [Send Email](#) link in many folders.
- Edit and Resend Letter: Available when a user edits a letter from the Correspondence History grid of the History page before resending it.
- Send Back to Author: Available when a user customizes the letter associated with the Send-Back-to-Author workflow.
- Assign Schedule Group Production Task: Available when a user customizes the letter associated with assigning a Schedule Group Production Task using ProduXion Manager.
- Batch Assign: Available when a user customizes the letter associated with batch assignment of tasks using ProduXion Manager or Task Manager.
- Cancel Schedule Group Task Assignment: Available when a user customizes the letter associated with cancelling a Schedule Group production task using ProduXion Manager.
- Cancel [Task] Assignment: Available when a user customizes the letter associated with cancelling a task using ProduXion Manager or Task Manager.

TO CONFIGURE:

No new configuration is required. Access to pages may depend on role and feature configuration.



Adobe Analytics Enhancement for Submission Process

User role impact: NONE

This enhancement adds Adobe Analytics tracking to the sequence of pages shown during the submission process. This tracking will indicate whether an Author has viewed the page and successfully provided the information configured as required for the associated submission step.

TO CONFIGURE:

No system configuration is required.

Manuscript Analysis Services API Enhancement

Manuscript analysis services evaluate materials for scholarly publications, for example, to check for compliance with industry guidelines or to perform statistical analysis. These third-party services can integrate with Editorial Manager, enabling the exchange of files from within EM.

This enhancement adds several data elements to allow the third-party services to customize results based on the EM workflow stage when the user accessed the results. The added data elements are:

- People ID: The identifier of the logged-in user accessing the results.
- Location: The Editorial Manager page where the user clicked the [Manuscript Analysis Services](#) link.
- Role Family: The Role Family of the logged-in user.

TO CONFIGURE:

For publications with a manuscript analysis service already enabled, no additional configuration is required.

To enable a manuscript analysis service or to request full documentation and instructions, contact your Aries Account Coordinator.

Reporting Enhancements

Changes to Editor- and Decision-Related Table and Field Names in Enterprise Analytics Reporting and General Data Export

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

The new table name will appear in the Choose View or Table drop-down list in EAR reports. New field names will appear in the Field drop-down list in EAR reports. These field 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.

Editor Roles table (formerly “Editor Role Permissions”)

- Activate/Inactivate Linked Submission Groups [EDITORROLE.CAN_CHANGE_ACTIVE_STATUS_OF_LINKED_SUBMISSION_GROUP]: Previously, this field was named “Can change the Active status of a Linked Submission groups.”
- Assign Schedule Group Production Task [EDITORROLE.ASSIGN_SG_PRODUCTION_TASK]: Previously, this field was named “Can assign Schedule Group Production Tasks.”
- Be Corresponding Production Editor [EDITORROLE.CAN_BE_CORR_PROD_ED]: Previously, this field was named “Can be Corresponding Production Editor.”
- Create Automated Author Transfer Reminders [EDITORROLE.CAN_CREATE_AUTOMATED_AUTHOR_TRANSFER_REMINDERS]: Previously, this field was named “Create Author Transfer Reminders.”
- Display in Request Editor Menu [EDITORROLE.REQUEST_BY_AUTHOR]: Previously, this field was named “Editor Role can be Requested by Author.”
- Download Attachments [EDITORROLE.DOWNLOADREVIEWERATTACHMENTS]: Previously, this field was named “Download Reviewer Attachments.”
- Edit Global MS ID [EDITORROLE.CAN_EDIT_GLOBAL_MS_ID]: Previously, this field was named “Can Edit Global MS ID.”
- Edit Linked Submission Groups [EDITORROLE.CAN_EDIT_LINKED_SUBMISSION_GROUPS]: Previously, this field was named “Can edit Linked Submission groups.”
- Edit Manuscript Notes [EDITORROLE.EDITMANUNOTES]: Previously, this field was named “Edit Notes on Manuscript Details.”
- Edit Production Notes [EDITORROLE.EDIT_PRODUCTION_NOTES_ON_MANU_DETAILS]: Previously, this field was named “Edit Production Notes on Manuscript Details.”
- Edit Submission Before Decision [EDITORROLE.ATTACHFILES]: Previously, this field was named “Edit Submission.”
- Editor Role ID [EDITORROLE.EDITORROLEID]: Previously, this field was named “Unique Editor Role ID.”
- Editor Role Name [EDITORROLE.NAME]: Previously, this field was named “Editor Role.” Fields in EAR and Cross-Publication EAR views that reference this field will also be renamed.
- Editorial Details Layout ID [EDITORROLE.EDITORIAL_LAYOUT_ID]: Previously, this field was named “The editorial layout used by the editor role.”
- Initiate Similarity Check [EDITORROLE.CAN_INITIATE_CROSSCHECK]: Previously, this field was named “Can Initiate Similarity Check.”
- Link/Unlink Alternate Reviewers [EDITORROLE.CAN_LINK_UNLINK_ALT_REVIEWERS]: Previously, this field was named “Permission to LINK and/or UNLINK Alternate Reviewers.”
- Manage Companion Files [EDITORROLE.UPLOAD_REMOVE_COMPANION_FILES]: Previously, this field was named “Upload/Remove Companion Files.”
- Override Author Revision Due Date [EDITORROLE.OVERRIDE_AUTH_REVISION_DUE_DATE]: Previously, this field was named “Override Author Revision Due Date permission.”



- Override Schedule Group Task Due Date [EDITORROLE.OVERRIDE_SG_PRODUCTION_TASK_DUE_DATE]: Previously, this field was named “Can override Schedule Group Task Due Dates.”
- Production Details Layout ID [EDITORROLE.PRODUCTION_LAYOUT_ID]: Previously, this field was named “The editorial layout used by the editor role.”
- Promote Alternate Authors [EDITORROLE.CAN_PROMOTE_ALTERNATE_AUTHORS]: Previously, this field was named “Can the editor promote alternate authors?”
- Proposal Details Layout ID [EDITORROLE.PROPOSAL_LAYOUT_ID]: Previously, this field was named “The proposal layout used by the editor role.”
- Propose Reviewers [EDITORROLE.CAN_PROPOSE_REVIEWERS]: Previously, this field was named “Permission to propose reviewers.”
- Remove Alternate Authors [EDITORROLE.CAN_REMOVE_ALTERNATE_AUTHORS]: Previously, this field was named “Can the editor remove alternate authors?”
- Remove Proposed Reviewers [EDITORROLE.CAN_REMOVE_PROPOSED_REVIEWERS]: Previously, this field was named “Permission to remove proposed reviewers.”
- Rescind Decision [EDITORROLE.CAN_RESCIND_DECISION]: Previously, this field was named “Letter Rescind Permission Flag.”
- Run Cross-Publication Custom Reports [EDITORROLE.CROSS_PUB_REPORTING_ENABLED]: Previously, this field was named “Run Cross-Publication Reports.”
- Schedule Reports [EDITORROLE.CAN_SCHEDULE_REPORTS]: Previously, this field was named “Can Schedule Reports.”
- Search People [EDITORROLE.SHOWPASSWORDS]: Previously, this field was named “View Username and Password on Search People Page.”
- Search Proposals [EDITORROLE.SEARCH_ALL_PROPOSALS]: Previously, this field was named “Can the editor search proposals?”
- Search Reviewers in Other Publications [EDITORROLE.SEARCH_REVIEWERS_IN_OTHER_JOURNALS]: Previously, this field was named “Search Reviewers in Other Journals.”
- Select Alternate Authors [EDITORROLE.CAN_SELECT_ALTERNATE_AUTHORS]: Previously, this field was named “Can the editor invite alternate authors?”
- Share Search Definitions [EDITORROLE.CAN_SHARE_SEARCH]: Previously, this field was named “Can Share Search.”
- Submit Editor-Use-Only Article Types [EDITORROLE.RESTRICT_TO_EDITOR_PUBLISHER_USE_ONLY_ARTICLE_TYPES]: Previously, this field was named “Submit Editor/Publisher Type Content Only.”
- System Administrator Restriction [EDITORROLE.SYSADMIN_RESTRICT_ACCESS]: Previously, this field was named “Restricted access switch on editor role page.”
- Turn Off Submission Flags [EDITORROLE.TURN_OFF_SUBMISSION_FLAGS]: Previously, this field was named “Turn Off Custom Flags.”
- Turn On Submission Flags [EDITORROLE.TURN_ON_SUBMISSION_FLAGS]: Previously, this field was named “Turn Off Custom Flags.”
- Upload Attachments [EDITORROLE.EDITREVIEWERATTACHMENTS]: Previously, this field was named “Edit Reviewer Attachments.”
- View Additional People Details [EDITORROLE.VIEW_ADDITIONAL_PEOPLE_DETAILS]: Previously, this field was named “View additional people details.”
- View At-Risk Submissions [EDITORROLE.CAN_VIEW_AT_RISK_SUBMISSIONS]: Previously, this field was named “Can this editor view at-risk submissions?”
- View Linked Submission Groups [EDITORROLE.CAN_VIEW_LINKED_SUBMISSION_GROUPS]: Previously, this field was named “Can view Linked Submission groups.”
- View Manuscript Notes [EDITORROLE.VIEWMANUNOTES]: Previously, this field was named “View Notes on Manuscript Details.”
- View Production Notes [EDITORROLE.VIEW_PRODUCTION_NOTES_ON_MANU_DETAILS]: Previously, this field was named “View Production Notes on Manuscript Details.”



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

Editor Assignments table

- Editor Assignment ID [ROLEEDIT.ROLEID]: Previously, this field was named ‘RoleID.’
- Editor Decision Term ID [ROLEEDIT.DECISIONID] Previously, this field was named “Decision ID.”

Editor Decision Terms table

- Decision Term Hidden [DECISION.HIDE]: Previously, this field was named “Hidden Flag.”

Decision Families table (formerly “Decision Family”)

- Translation Token ID [DECISIONFAMILY.DECISIONFAMILYNAME_RESOURCEID]: Previously, this field was named “Decision Family Name Resource ID.”

New field 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. User-entered Description text is not overwritten in existing reports.



These changes also apply to General Data Export. The new table name appears in the Choose Table drop-down list. 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).

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.

Table name change

This new table name appears in the drop-down list on the main General Data Export page where a user makes a table selection.

Do Not Skip Editor in Decision Chain Data [SKIPIFNOT]: Previously, this table was named “Do Not Skip Editor in Decision Chain Settings.”

Field name changes

Automatic Discussion Trigger Roles table, one field has been renamed.

- Editor Role ID [AUTOMATIC_DISCUSSION_EDITORS.EDITORROLEID]

Days to Revise by Decision Terms table, one field has been renamed.

- Article Type ID [DAYS_TO_REVISE_BY_DECISION_TERM.DCATEGOID]

Decision Letter Options table, one field has been renamed.

- Letter ID [DECISION_LETTERS_OPTIONAL.LETTER_ID]

Decision Notification Endpoints table, one field has been renamed.

- Editor Decision Term ID [DECISION_NOTIFICATION_ENDPOINTS.DECISION_ID]

Do Not Skip Editor in Decision Chain Data table, one field has been renamed.

- Do Not Skip Editor in Decision Chain Data ID [SKIPIFNOT.SKIPIFNOTID]

Edited Individual Reviewer Comments table, one field has been renamed.

- Reviewer Assignment ID [DECISION_CHAIN_REVIEWER_COMMENTS.REVIEWER_ASSIGNMENT_ID]

Saved Search Display Preferences, one field name has been renamed.

- People ID [SEARCH_PREFS.PEOPLEID]

Skip Editor in Decision Chain Data table, one field has been renamed.

- Skip Editor in Decision Chain Data ID [SKIPIF.SKIPIFID]

TO CONFIGURE:

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

