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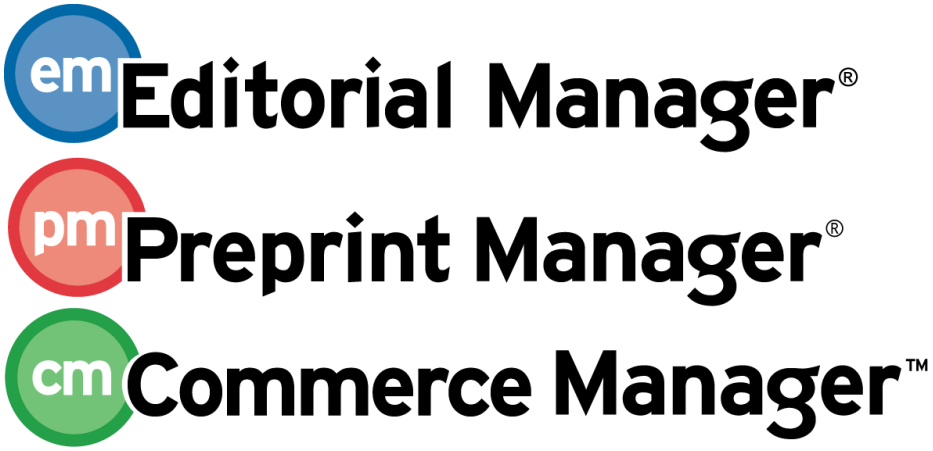

Release Notification

Editorial Manager/Preprint Manager
8.0 General Release Notification
08/18/2010
Draft – Subject to Change

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Document Change Log

Date	Version	Change
5/21/2010	Beta Release	
7/12/2010	Gamma Release	Change in title Update image on pg. 63

8/18/2010	General Release	• Incorporate Gamma Supplement into General release notes
		• Additional item available on Custom Details
		• Update images on pp. 30, 64, 65
		• Revisions in 'Attachment Security' section; removal of 'Unavailable' message
		• Additional Sections:
		  • Submission & Author Questionnaires Custom Report View
		  • Addition of Special Characters

Editorial Manager/Preprint Manager 8.0 General Release Notification

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GENERAL ENHANCEMENTS

Author Resolver Integration

Information on Authors, such as previously published work and collaborative partners, can be valuable in deciding how to proceed with a submission or when selecting an Author from whom to invite a submission. New in EM v8.0, publications may allow Editors access to a third-party tool called Author Resolver. When enabled, Author Resolver provides access to the COS Scholar Universe profiles, and automatically executes a search using Author and submission data (depending on the page being viewed). Editors may then review this information to identify any possible matches.

When enabled for use in EM, Editors are given access to the concise version of the Author's profile, which is provided free of charge. If users wish to access the full profile, they will need to log into COS Scholar Universe, which requires a paid subscription. NOTE: Aries Systems is not involved in that process or procuring a paid subscription, and cannot assist with questions concerning paid subscriptions.

The Author Resolver tool is available from the following pages. The fields included in the search criteria are variable depending on which page is being accessed:

- Search for matching Author Name, Author E-mail Address:
  1. Invite Authors Search Results (Proposals and Commentaries)
  2. Search People
- Search for matching Submission Title, Corresponding Author Name, Corresponding Author E-mail Address:
  1. New Submissions
  2. New Submissions Requiring Assignments
  3. New Editor Invitations
  4. New Assignments
  5. Direct-to-Editor New Submissions
- Search for matching Submission Title, Corresponding Author Name, Corresponding Author E-mail Address, Other Author Name(s), Other Author E-mail Address(es), Other Author Organizational Affiliation(s):
  1. Details

When an Editor accesses one of the above pages, the page loads as it does today. Once all data is loaded onto the page, EM uses the Author Resolver tool to send relevant Author and submission information (listed above for each folder) to the COS Scholar Universe database. Author Resolver performs a comparison search between the information from EM and information in the database. If Author Resolver finds one or

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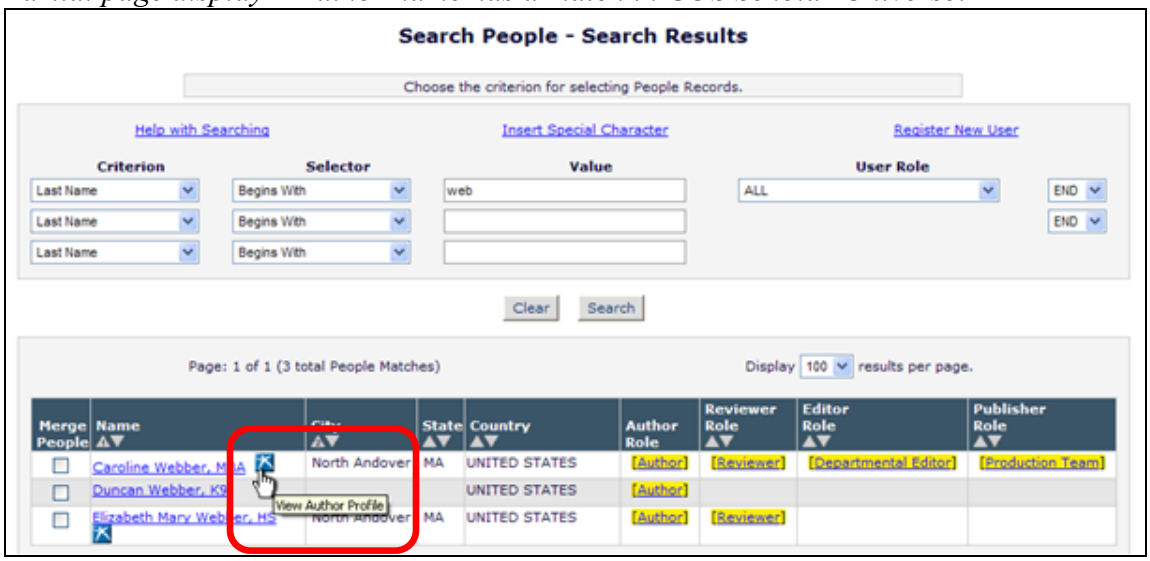
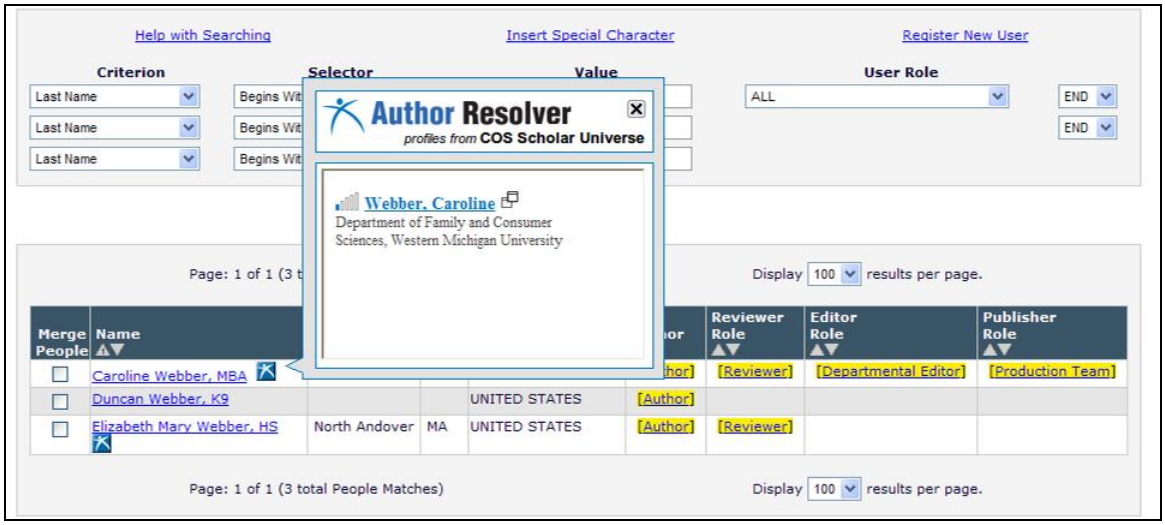
more possible matches, the Author Resolver icon appears next to the matched name. Clicking on the icon opens a pop-up which provides summary information about the possible matching profile(s). The Editor may then click on a name in the box to open the COS Scholar Universe site and view the Author's profile.

On any page where the Author Resolver icon displays, the "View Author Profile" tooltip will appear when the Editor hovers over the icon.

Partial page display – Author name has a match in COS Scholar Universe:



Clicking the Author Resolver icon opens a box with additional information about the match(es). This may assist the user in determining if this is a correct match.



If the Editor clicks a linked name in the box, the associated COS Scholar Universe profile is opened in a pop-up window.

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TO CONFIGURE:
To enable this feature for Editors, go to RoleManager, select the desired Editor role(s), and enable the new "View COS Scholar Universe Author Profiles" permission in the 'General Searching and Viewing' section. Once enabled, the Author Resolver tool will run after all data is loaded onto one of the above listed pages.

NOTE: If you would like to see the "full" (paid) profiles, you must contact COS Scholar Universe about setting up a paid subscription. The relationship between COS Scholar Universe and publishers is independent of the relationship between Aries Systems Corporation and publishers. More details about the business requirements for participating in COS Scholar Universe are available from COS Scholar Universe (www.authorresolver.com).

TECHNICAL NOTE: Author Resolver relies on scripts stored outside of Aries, so users who restrict cross-site scripting through their browsers or browser add-ons may need to add api.scholaruniverse.com to their list of safe domains for the new feature to work.

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Reference Checking/eXtyles Enhancements

Some publications would like to have Reference Checking/eXtyles automatically correct mistakes in references that eXtyles currently identifies but does not alter (because the information is not available within the author-submitted manuscript). For example, in EM/PM v7.3, eXtyles will mark-up the references and show parts of the reference that are not correct (e.g. not enough authors before "et al" or a missing volume number). eXtyles is able to detect the fact that information is missing, but cannot fill in this information (because it is not available in the manuscript). In addition, Authors may have incorrect information in the reference they have submitted (e.g. misspelled author names, incorrect words in the article title), and eXtyles has not been able to correct this information.

New in EM/PM v8.0, a new feature called 'Automatic Reference Correction' (ARC) has been added to the Reference Checking/eXtyles tool to perform auto-correction of references. The new version of Reference Checking can access the full metadata for any reference that links to PubMed or CrossRef, retrieve that data, and then reconstruct the Author's reference by adding, or adding and merging the online data with the original reference, effectively automatically correcting the references according to the PubMed or CrossRef record.

ARC has two modes:

- The first, which is more conservative, is 'Add' mode, in which only missing data is added.
- The second is 'Add and Merge' mode, in which missing data is added and incorrect data is updated from the online source.

NOTE: Generally Aries recommends 'Add and Merge' for PubMed, but 'Add' for CrossRef.

To use the ARC feature, the publication must have a Reference Cleanup Profile configured for use in Editorial Manager/Preprint Manager. The references will be corrected according to the selected profile.

The corrected references will be displayed:

- On the *Reference Checking Results* page.
- In the cleaned-up and marked-up Word files (accessible to Editors from the 'Download File' button on the *Reference Checking Results* page).

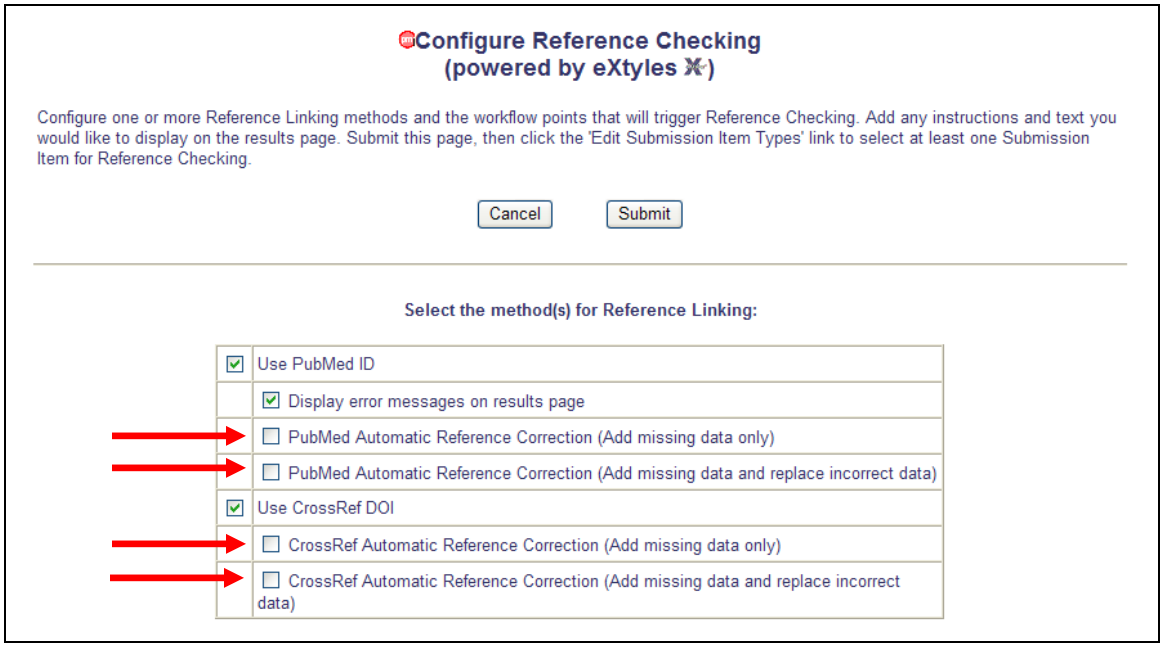
TO CONFIGURE:
For Publications already using Reference Checking, the current Reference Checking settings are retained at upgrade to v8.0. In addition to the current settings, Publications

will see new options available for selection on the *Configure Reference Checking* page in PolicyManager:

- PubMed Automatic Reference Correction (Add missing data only)
- PubMed Automatic Reference Correction (Add missing data and replace incorrect data)
- CrossRef Automatic Reference Correction (Add missing data only)
- CrossRef Automatic Reference Correction (Add missing data and replace incorrect data

NOTE: Only one Automatic Reference Correction setting can be selected for each service – i.e. the Publication cannot select both PubMed Automatic Reference Correction (Add missing data only) and PubMed Automatice Reference Correction (Add missing data and replace incorrect data); these two choices are mutually exclusive. Similarly, the two Automatic Reference Correction selections for CrossRef are mutually exclusive. However, the Publication can make a choice for both PubMed and CrossRef Automatic Reference Correction.

To add Reference Checking to your EM/PM site as a feature, please contact your Aries account coordinator.



Support for Open Document Files

Authors are using open source applications such as OpenOffice to create the documents they wish to submit to Editorial Manager publications. EM/PM v8.0 now supports some OpenDocument file formats so that Authors are able to upload files without having to first manually convert them into Word, Excel, or PowerPoint format.

Authors may now upload files in the following OpenDocument file formats:

- OpenDocument spreadsheet (.ods)
- OpenDocument Word Processor (.odt)
- OpenDocument presentation (.odp)

TO CONFIGURE:
No configuration is required. On upgrade, Editorial Manager is enhanced to allow these file formats to be uploaded and built into the submission PDF file.

Note that some Open Office features, such as equations and graphics files, may not be fully supported. Authors should be reminded to check the resulting PDF carefully before approving their submission.

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Allow Secondary Name and Address Information

Some publications would like to capture alternative versions of Authors' name and address information. This usually arises where the publication's primary language uses a non-Roman alphabet (e.g. Chinese) and needs to capture a Romanized version of the Author's name, or where a western journal has a significant overseas authorship and wishes to capture Authors' names in their original language.

New in EM/PM v8.0, Secondary fields may be configured for this purpose, and are available for data entry and/or display on the registration and update people information pages, and the expedited reviewer login page.

Twelve new fields are available to store a second version of a person's name and address information. The fields are:

1. 'Secondary First Name'
2. 'Secondary Last Name'
3. 'Secondary Institution'
4. 'Secondary Degree'
5. 'Secondary Position'
6. 'Secondary Department'
7. 'Secondary Address Line 1'
8. 'Secondary Address Line 2'
9. 'Secondary Address Line 3'
10. 'Secondary Address Line 4'
11. 'Secondary City'
12. 'Secondary State'

When enabled, each field is displayed under the 'primary' (existing) version of the field. In other words, when Secondary First Name is configured to display on these pages, the order of fields would be:

- Title
- First Name
- Secondary First Name
- Middle Name
- Etc.

The new fields may be displayed for data entry use on the following pages:

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- Registration Page
- Proxy Registration – Enter More Contact Information Page
- Update My Information
- Search People – Update Information
- Expedited Reviewer Login

The fields are displayed as labels on the People Information (Activity Details) page.

Just like regular registration fields, these fields may be optional or required, or set to be hidden. When required, the field labels display in red text with an asterisk (*) to denote that they are required fields.

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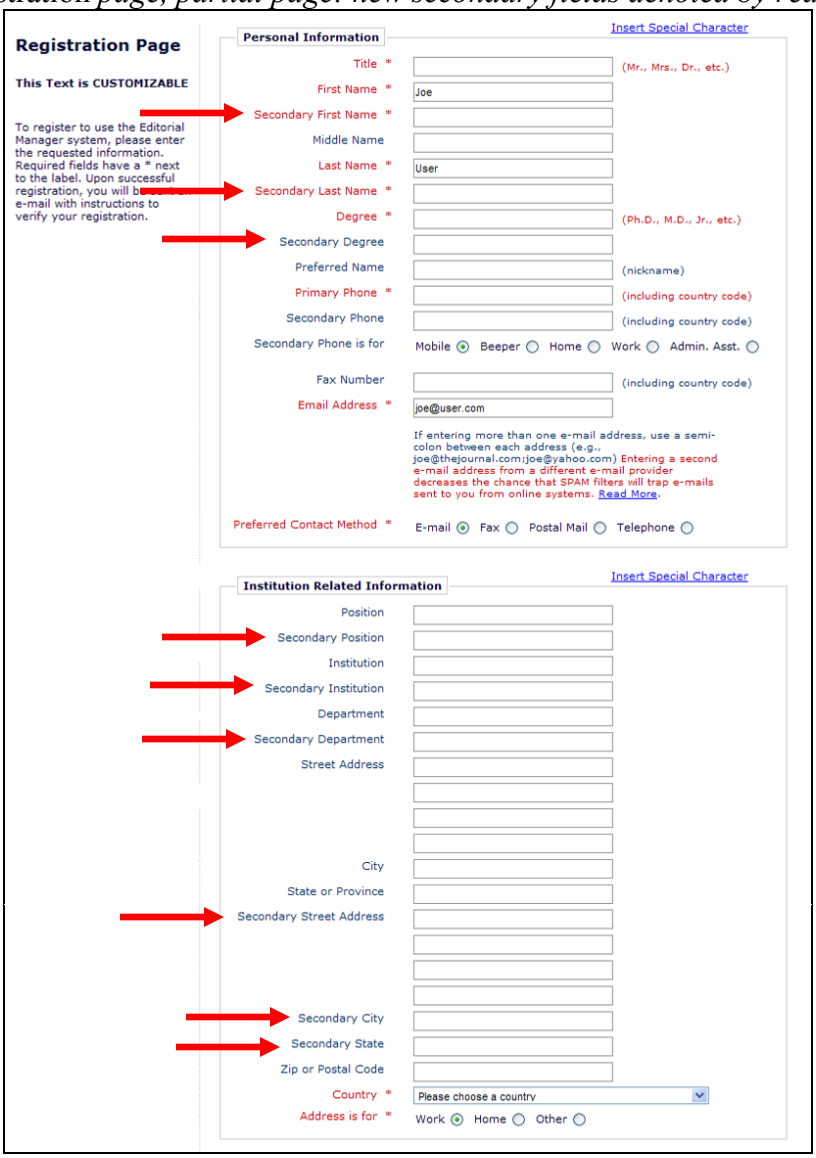
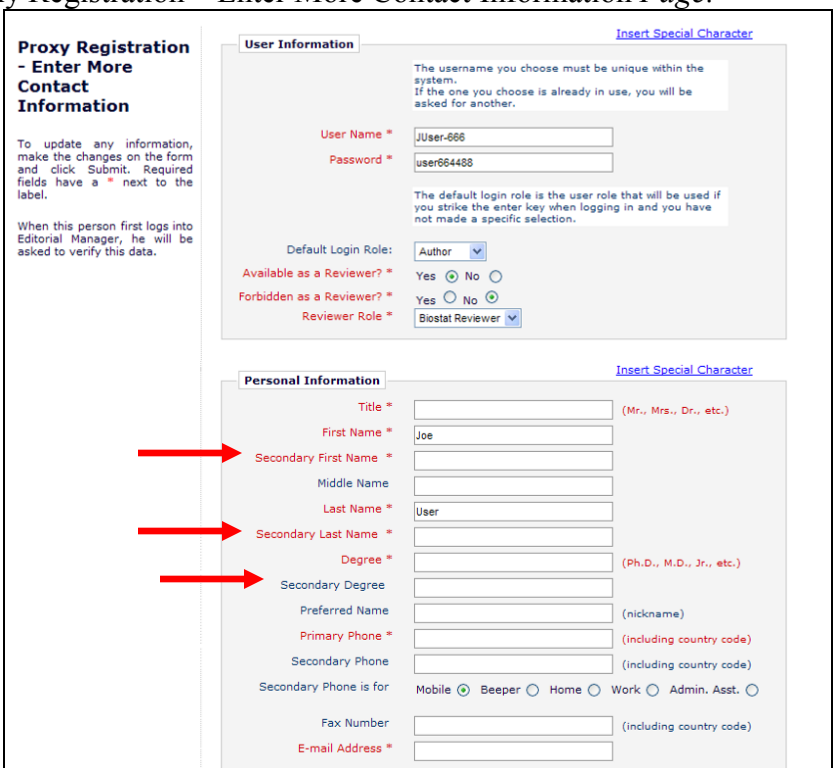
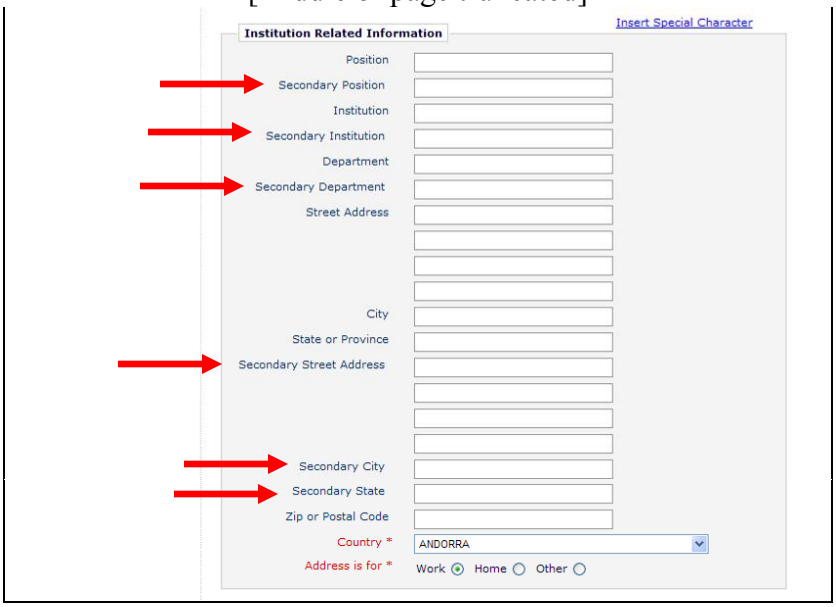
Sample Registration *page, partial page: new secondary fields denoted by red arrows.*



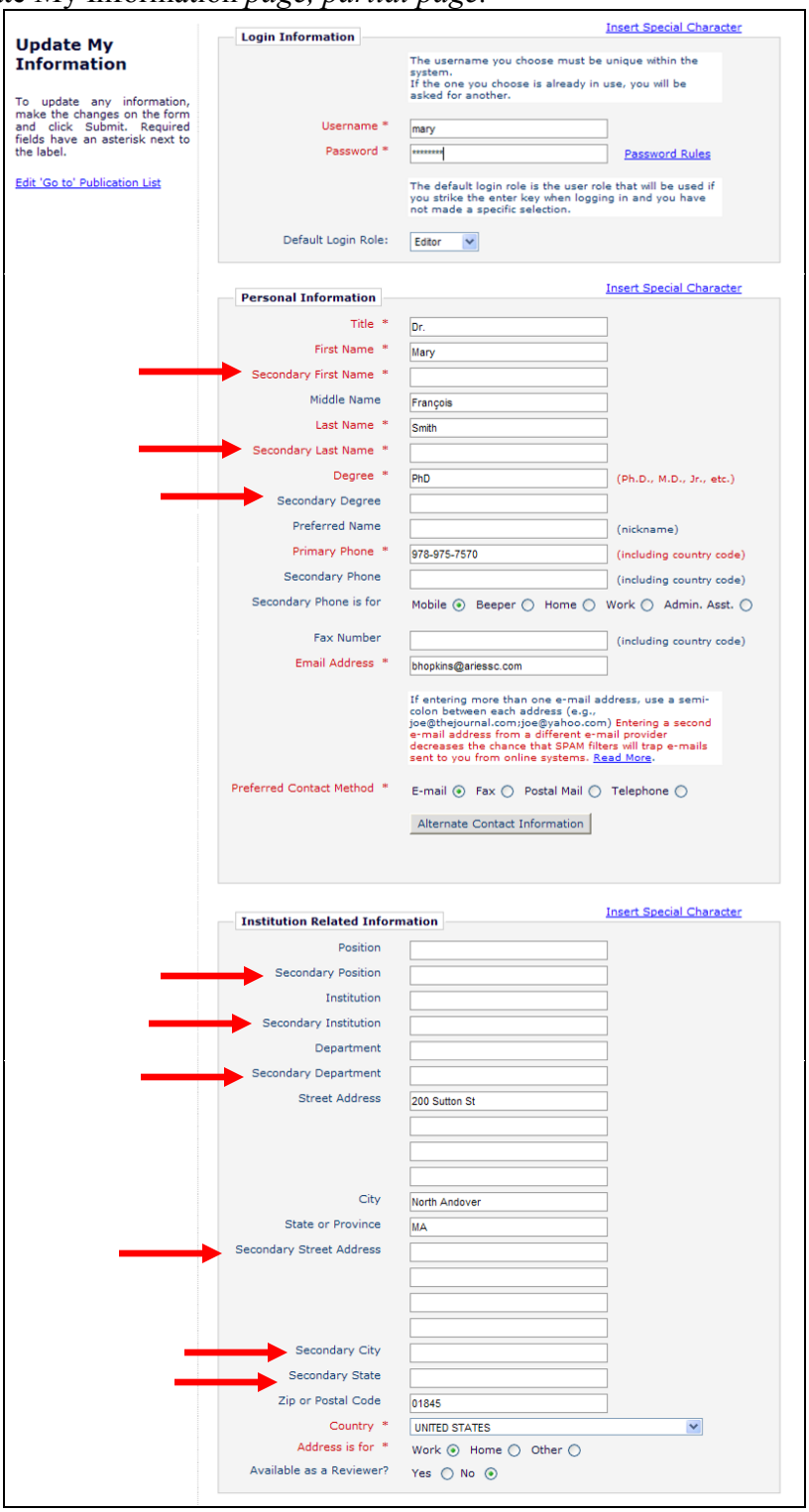
Sample Proxy Registration – Enter More Contact Information *Page:*



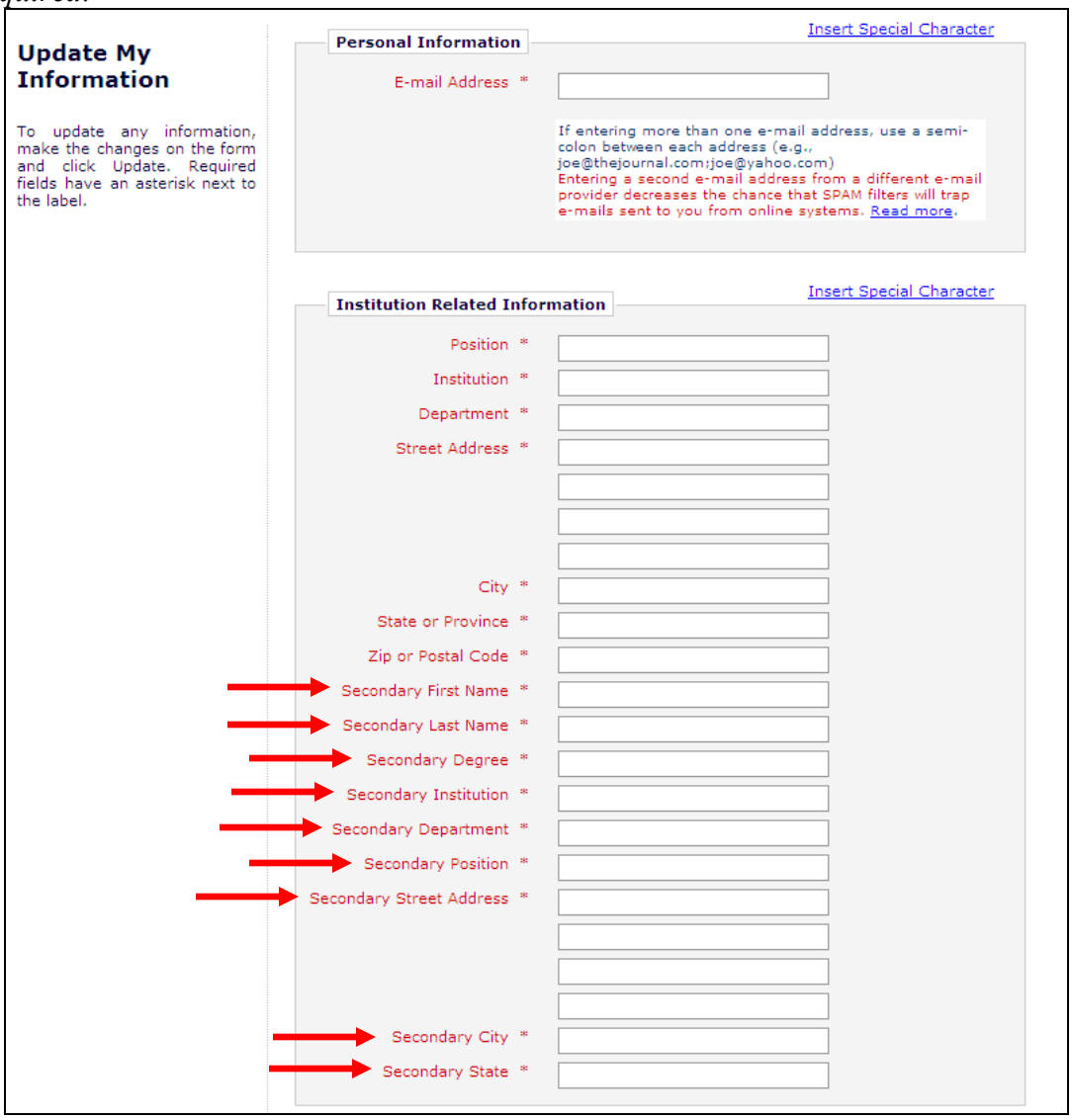
[middle of page truncated]



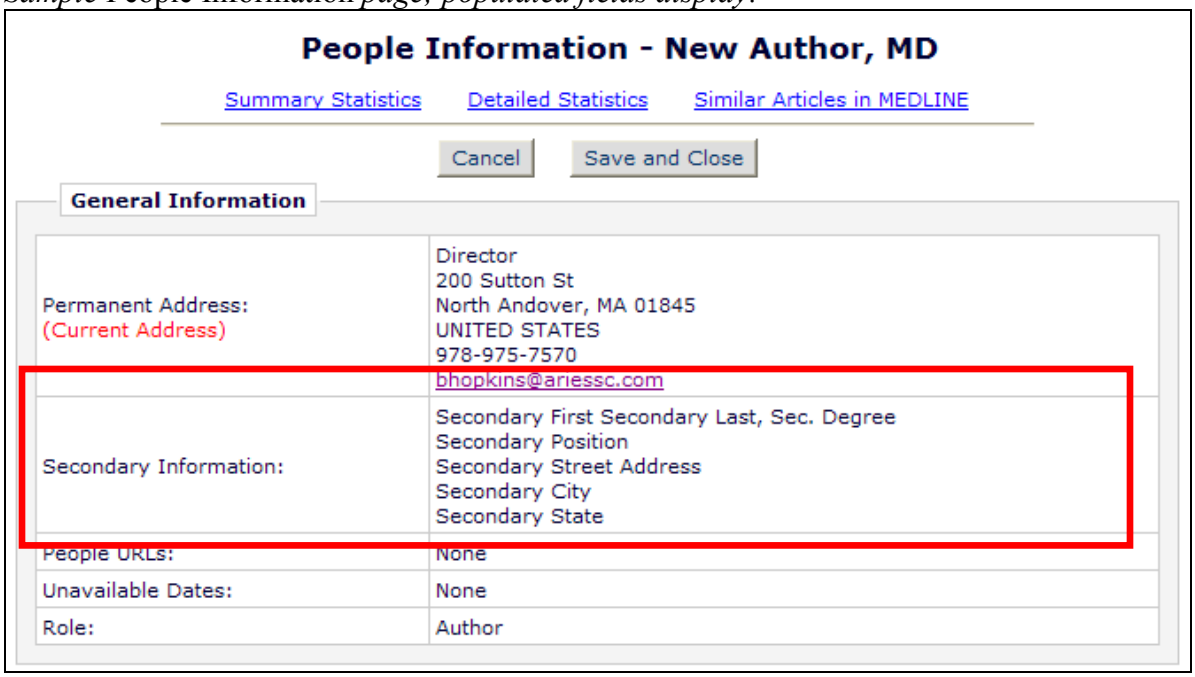
Sample Update My Information *page, partial page:*



Sample Expedited Reviewer Login *page, where every Secondary field is selected as Required:*

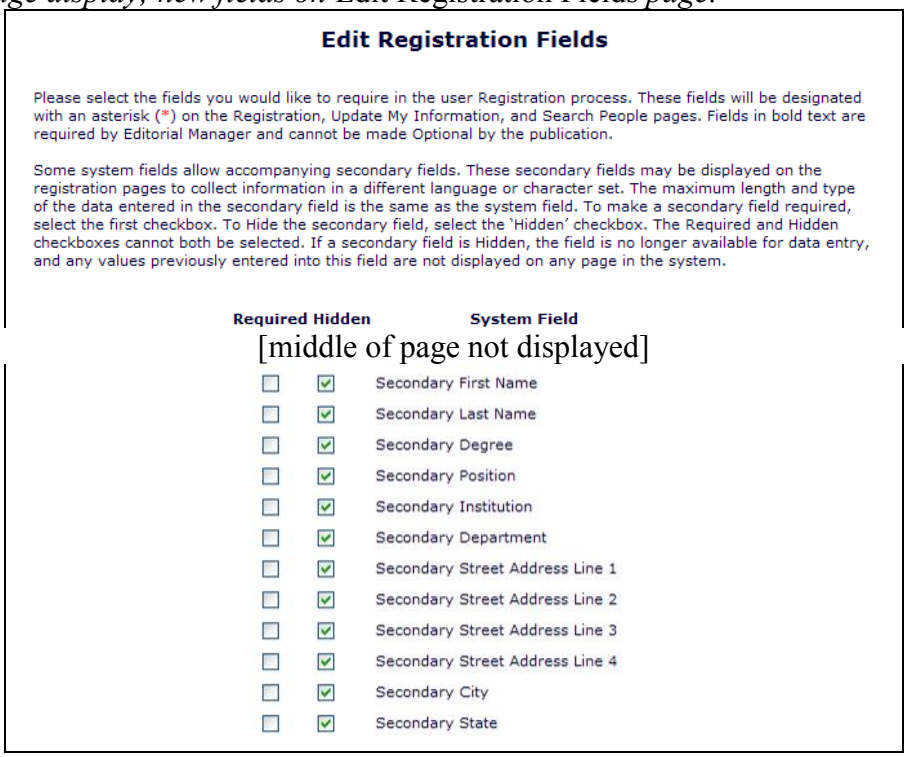


Sample People Information *page; populated fields display:*



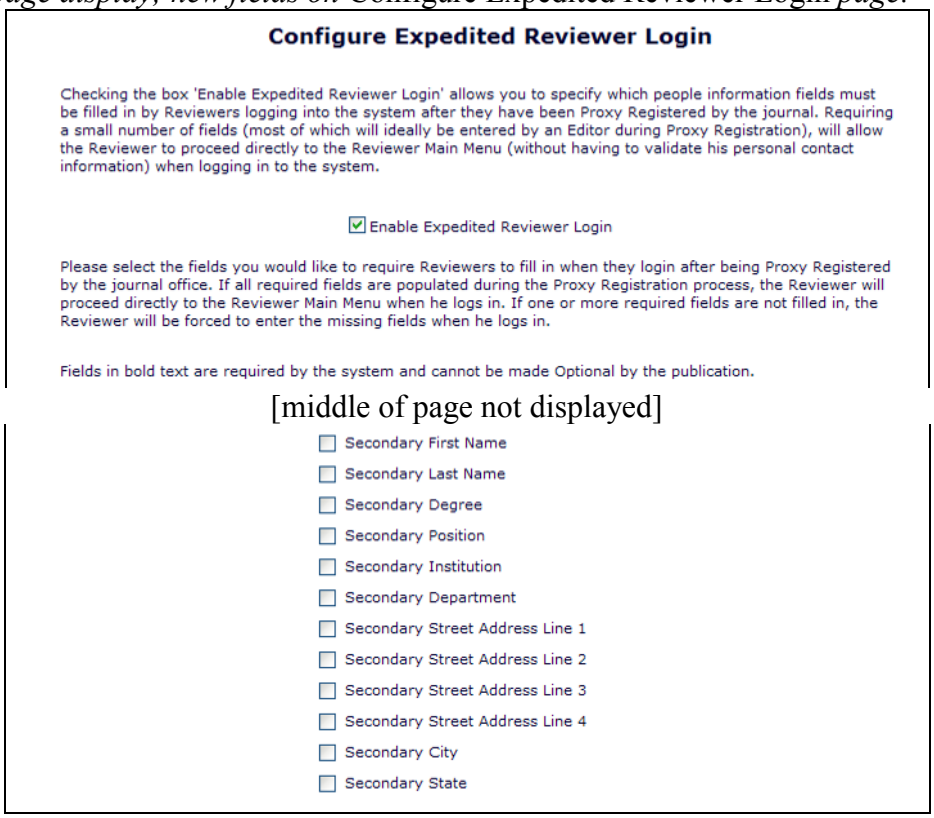
TO CONFIGURE FOR REGISTRATION:
Go to the *Edit Registration Fields* page in PolicyManager. At upgrade, the 12 new Secondary Name and Address fields on *Edit Registration Fields* are displayed following the 'Username' field and marked as 'Hidden' (the checkboxes in the 'Hidden' column are selected). To enable any of these fields for use in registrations, uncheck/deselect the box under the 'Hidden' column on this page. To require any of these fields, uncheck/deselect the 'Hidden' box, and check/select the 'Required' box.

Partial page display; new fields on Edit Registration Fields *page:*



TO CONFIGURE FOR EXPEDITED REVIEWER LOGIN:
Go to the *Configure Expedited Reviewer Login* page in PolicyManager. At upgrade, the 12 new Secondary Name and Address fields on this page are not selected. To mark any of these fields as required for the Expedited Reviewer registration, select/check the box next to the field.

Partial page display; new fields on Configure Expedited Reviewer Login *page:*



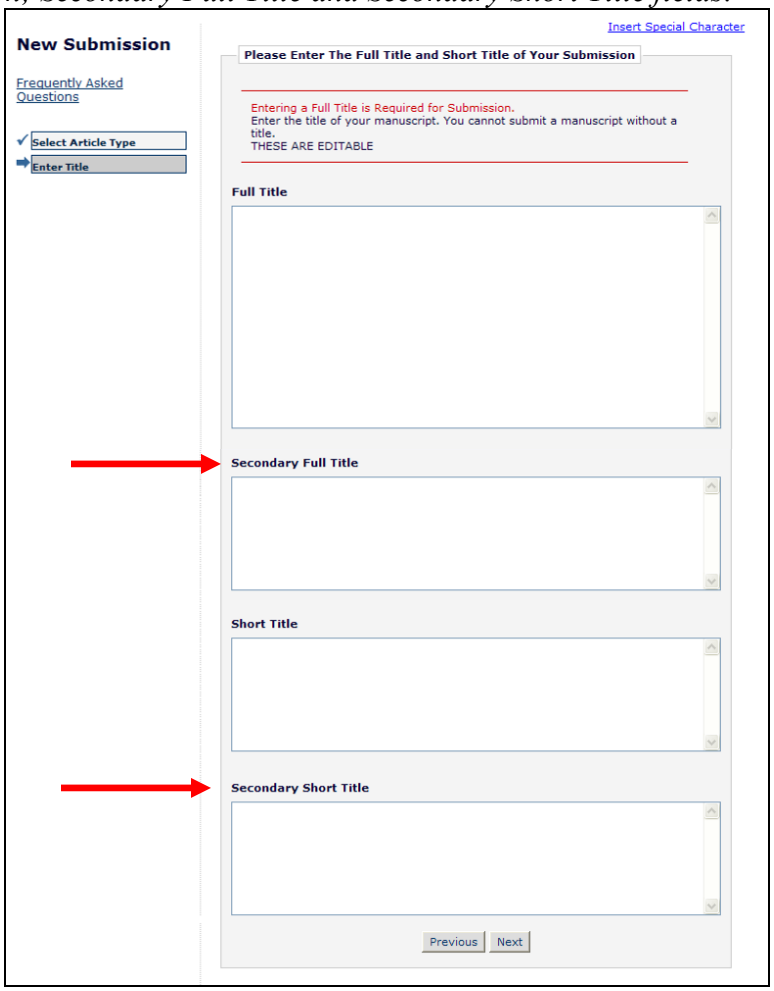
Secondary Submission Fields - Submit Manuscript Interface Changes

Some publications wish to capture key title and abstract information in multiple languages, for example where the publication requires an English title or abstract for online systems but publishes in another language, or where it publishes translated papers in English but includes the title or abstract in their original language.

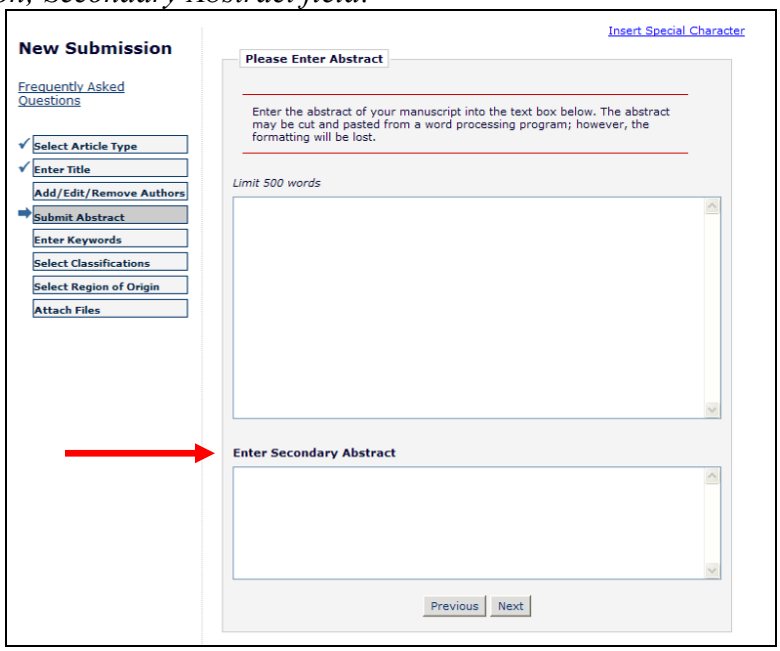
New in EM/PM v8.0, three new fields are available for use when submitting a new or revised manuscript: 'Secondary Full Title', 'Secondary Short Title', and 'Secondary Abstract'. These new fields can be used to hold the information in a different language than the one entered into the existing system field.

The three new fields are configurable by Article Type. When configured to display on an Article Type, each of these fields displays with the corresponding Primary field. In other words, the 'Secondary Full Title' entry box appears under the 'Full Title' entry box for 'New Submission', 'Revise Submission', or 'Edit Submission'.

New Submission; Secondary Full Title and Secondary Short Title fields:



New Submission; Secondary Abstract field:



NOTE: There are no word or character limits applied to these fields.

These three fields are hidden on upgrade, but can be configured as 'Optional' or 'Required' for any Article Type. When selected as 'Required', the Author will not be able to complete the submission without filling in this information, and will be notified of the missing information on the 'Attach Files – File Summary' page prior to building the submission.

These fields may also be configured to display on the PDF cover page of the submission. When they are selected (and populated by the Author), each Secondary Field displays under the related primary field on the PDF Cover Page.

TO CONFIGURE:
To enable any of these new fields for submissions, go to PolicyManager, *Edit Article Type* page, and click 'Edit' next to the desired Article Type (or create a new Article Type). These new secondary fields are configured as 'Hidden' on upgrade to v8.0, and may be set to either 'Optional' or 'Required' for any Article Type.

If set to 'Optional' or 'Required', determine if this information should display on either the Author/Editor PDF Cover Page or the Reviewer PDF Cover Page by selecting/checking the appropriate box.

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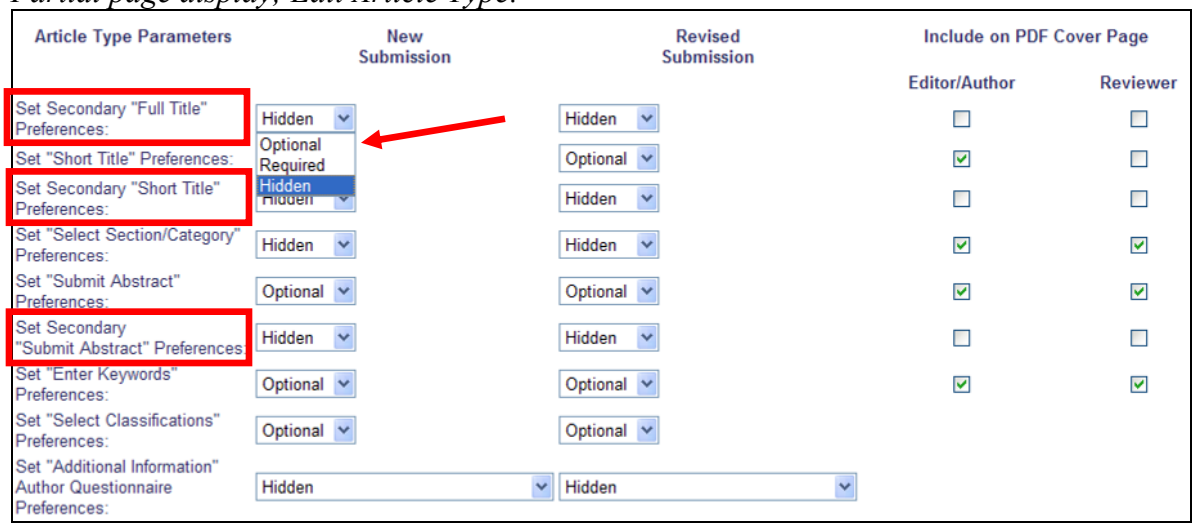
Partial page display; Edit Article Type:



Request Secondary Name and Address information on Add/Edit Authors Step

Authors using Editorial Manager may wish to submit papers where some of the Other Authors (co-authors) are from countries (such as China or Japan) where they may have names or addresses using both Romanized character sets as well as local character sets. New in EM/PM v8.0, Secondary fields may be added to the 'Add/Edit Authors' step of the submission process, enabling Corresponding Authors to provide Secondary Name and address information, if applicable.

Nine new fields are available for use on the Add/Edit/Remove Authors step for New Submission, Revised Submission, or Edit Submission. The fields are:

1. 'Secondary First Name'
2. 'Secondary Last Name'
3. 'Secondary Academic Degree(s)'
4. 'Secondary Institution'
5. 'Secondary Position'
6. 'Secondary Department'
7. 'Secondary Street Address'
8. 'Secondary City'
9. 'Secondary State'

These fields are set to be 'Hidden' on upgrade to v8.0. If configured to display as either 'Optional' or 'Required', they are available for data entry on the Add/Edit Authors pop-up page.

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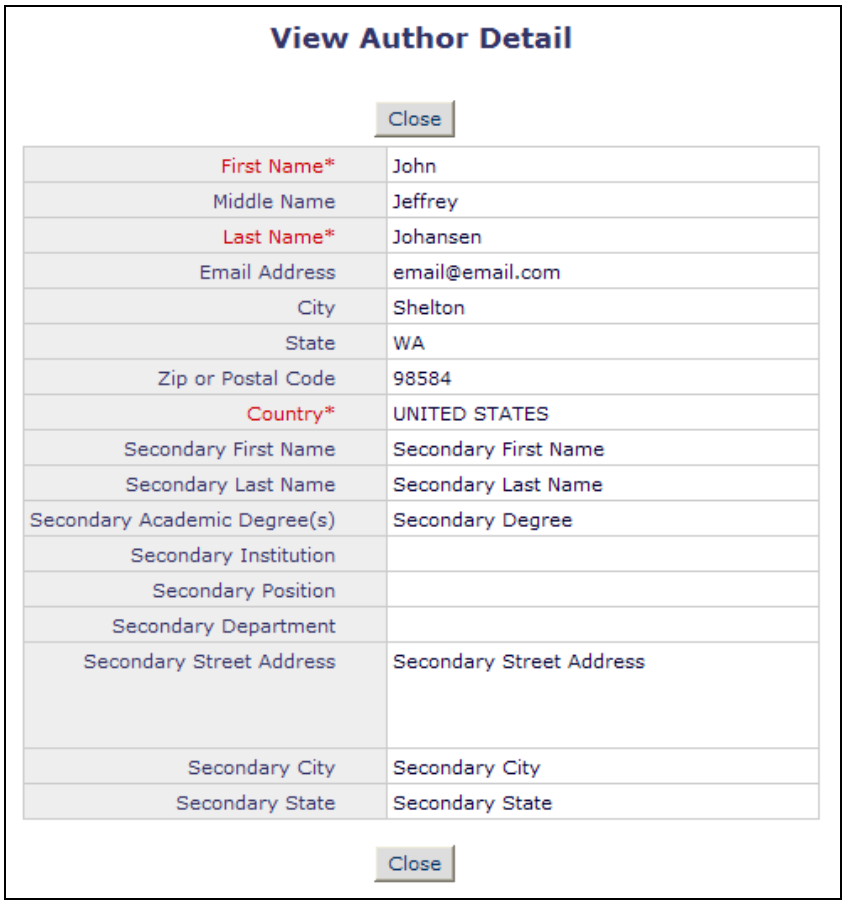
Sample Page; Add/Edit Other Authors – *Secondary First name and Secondary Last Name are required; other Secondary fields are optional:*

After Other Authors have been added, the Corresponding Author may view the information entered by clicking the View link next to the specific Author. The *View*

Author Detail page displays all fields configured to display with any information the Corresponding Author has entered.



View Author Detail

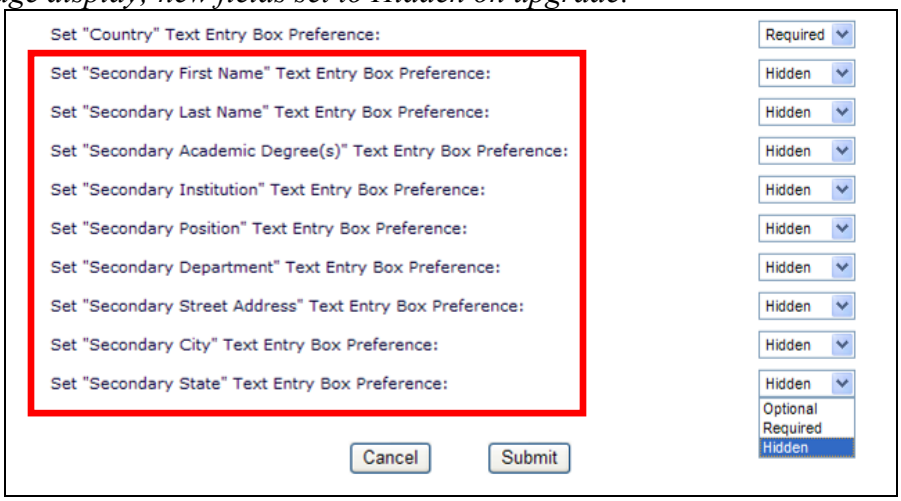
Close

First Name*	John
Middle Name	Jeffrey
Last Name*	Johansen
Email Address	email@email.com
City	Shelton
State	WA
Zip or Postal Code	98584
Country*	UNITED STATES
Secondary First Name	Secondary First Name
Secondary Last Name	Secondary Last Name
Secondary Academic Degree(s)	Secondary Degree
Secondary Institution	
Secondary Position	
Secondary Department	
Secondary Street Address	Secondary Street Address
Secondary City	Secondary City
Secondary State	Secondary State

Close

TO CONFIGURE:
To enable any of the Secondary Fields on the 'Add/Edit Other Authors' popup window, go to the *Set Other Author Parameters* page in PolicyManager. All nine fields are set as 'Hidden' on upgrade to v8.0. To display these fields, select 'Optional' or 'Required' for each. If selected as 'Hidden' on this page, the fields are suppressed on the 'Add/Edit Authors' popup window, and on the 'View Authors Detail' popup window.

Partial Page display; new fields set to Hidden on upgrade:



Custom Details

EM/PM v8.0 introduces new 'Secondary Information' fields, allowing users to add information to the system, for example in a non-Romanized character set. Some Editors may wish to view this information in the customized *Details* page for submissions. To accommodate this, a set of Secondary fields may be added to customized *Details* layouts:

- Secondary Full Title
- Secondary Short Title
- Secondary Abstract
- All Authors Secondary Information *(List including Corresponding Author)* – this field displays a list of Secondary First Name, Secondary Last Name and Secondary Degree for all Authors with this information, similar to the way the 'All Authors' list is displayed, but using the Secondary information to create the list.

Additionally, users of the 'Attachments' feature (formerly Reviewer Attachments) may wish to allow Editors access to upload Attachments. Editors with the 'Upload Attachments' permission enabled now have the option of uploading an Attachment prior to inviting Reviewers to review a submission. A new 'Attachments' link is added to the default *Editorial Details* page for this purpose. This link is also available for inclusion on custom *Details* pages; publications using custom *Details* layouts will need to manually update these layouts in PolicyManager.

These fields may be added to the display in any position on the *Details* layout.

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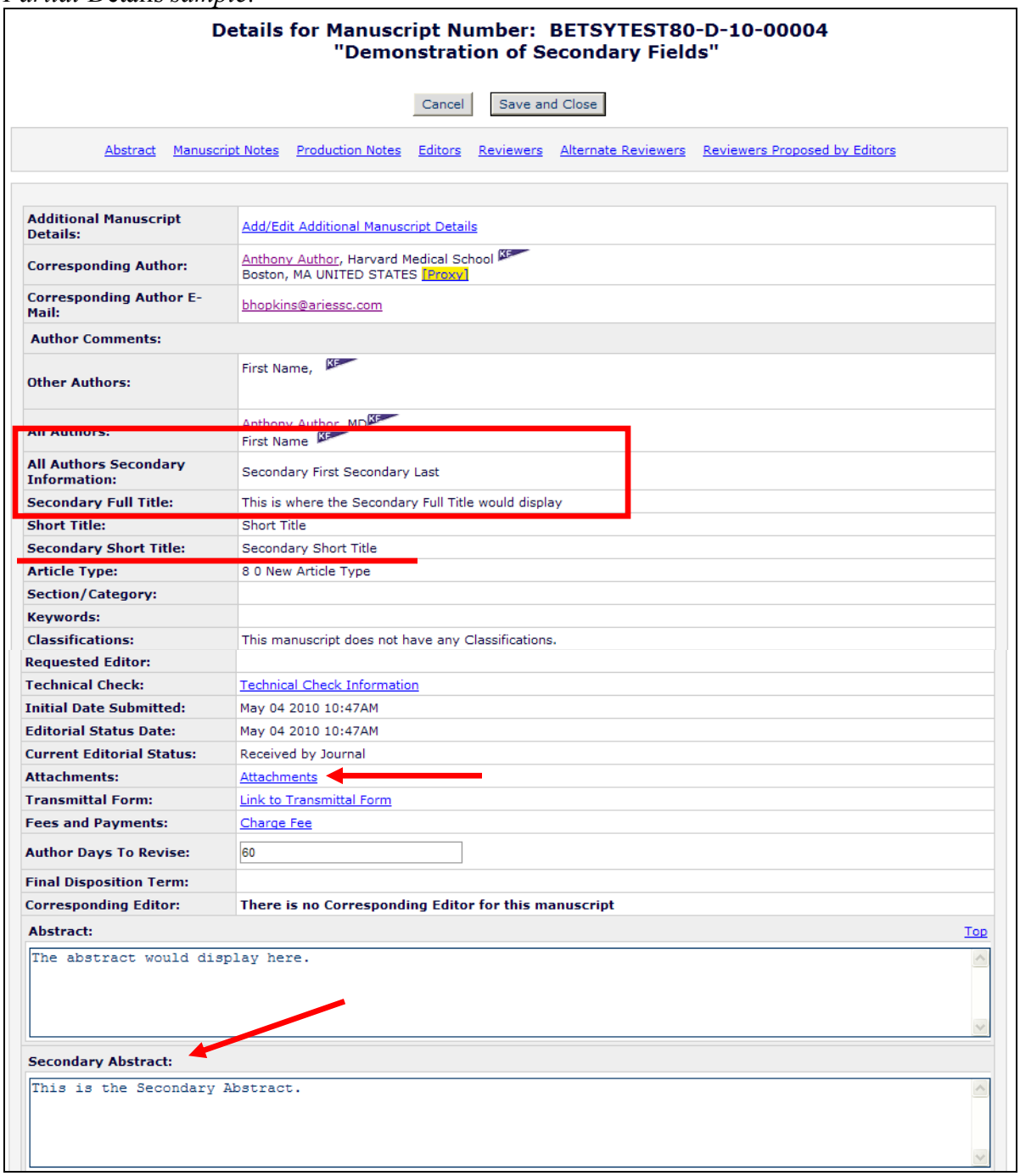
Partial Details *sample:*



TO CONFIGURE:
To display the Secondary fields on custom Details layouts, go to PolicyManager, 'Define Details Page Layouts', and click 'Edit' next to the Details layout you wish to modify. From there, click the 'Select Items to Display' link to see the complete list of options available for use on Details.

Four new Secondary fields are listed in the 'Information Submitted by Author' section:

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- Secondary Full Title – displays the Secondary Full Title as entered by the Corresponding Author
- Secondary Short Title – displays the Secondary Short Title as entered by the Corresponding Author
- All Authors Secondary Information (*List including Corresponding Author*) – displays the Secondary First Name and Secondary Last Name and Secondary Degree of all Authors
- Secondary Abstract – displays the Secondary Abstract as entered by the Corresponding Author. NOTE: The Secondary Abstract may not be edited on the *Details* page.

To display the Attachments link on custom Details layouts, expand the 'Links' section of the 'Select Items to Display' page and select 'Attachments'.

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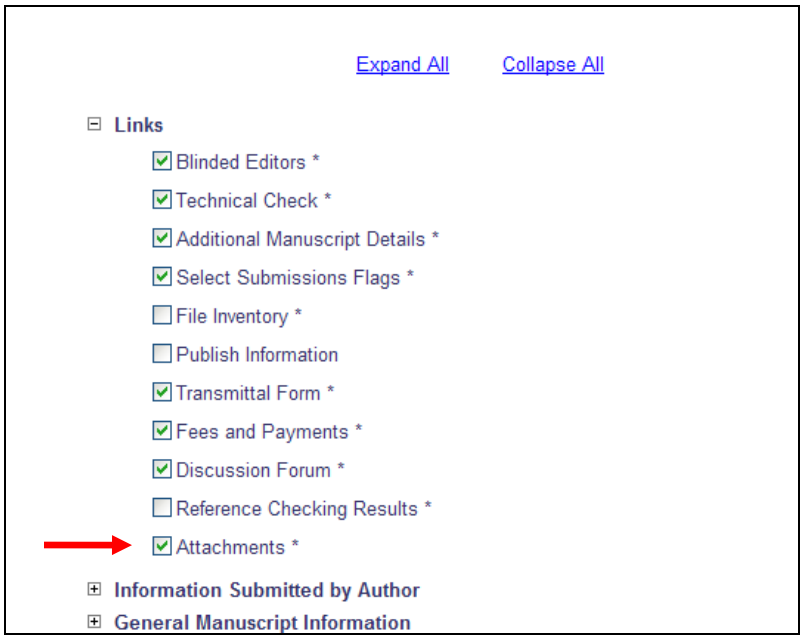


Once selected on this page, the Display Order of the items may be updated on the Layout Page.

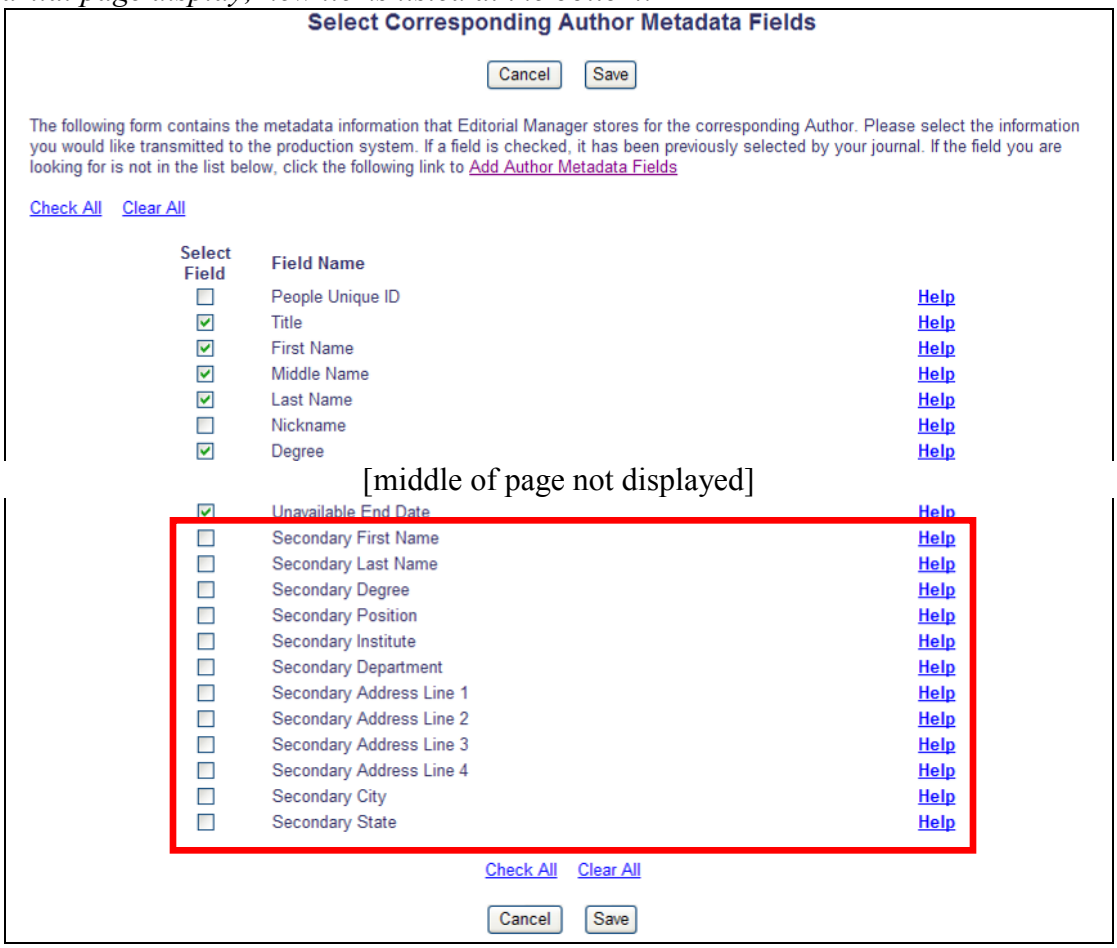
Secondary Fields Available on the Transmittal Form

EM/PM v8.0 introduces new 'Secondary Information' fields, allowing users to add information to the system, for example in a non-Romanized character set. These fields may also be selected for inclusion on the Transmittal Form.

Publications may select any of the new Secondary fields to display on the Transmittal Form in PolicyManager. When selected to display on the Transmittal Form, these fields will also be included in the %TRANSMITTAL_FORM% merge field.

TO CONFIGURE:
To select the Corresponding Author Secondary Name and Address fields, go to the *Select Corresponding Author Metadata Fields* page in PolicyManager. The new fields are displayed at the bottom of the page. Select/check the fields to display on the Transmittal Form for all submissions.

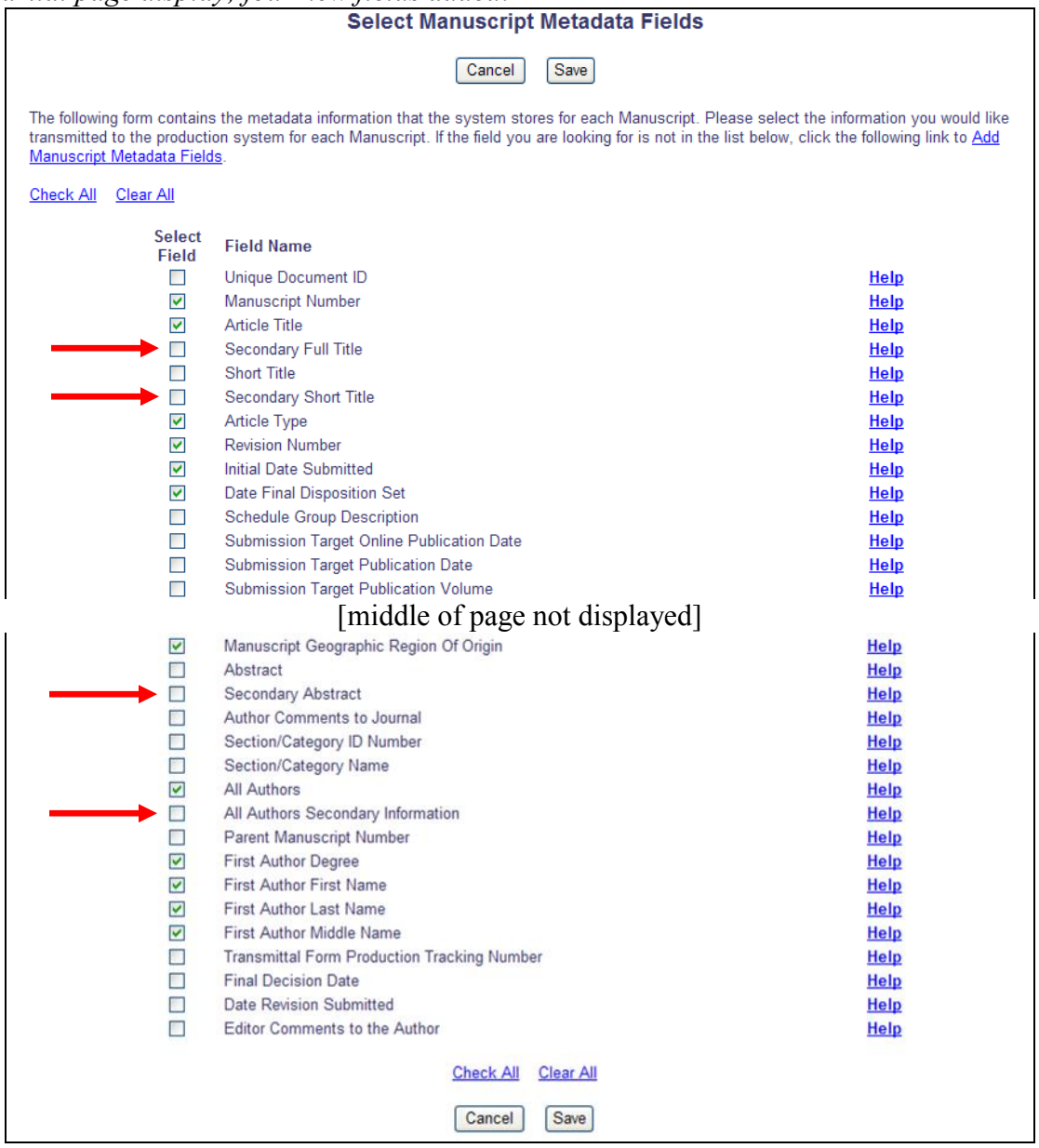
Partial page display; new items listed at the bottom:



To select the submission secondary fields Secondary Full Title, Secondary Short Title, Secondary Abstract, or All Authors Secondary Information, go to the *Select Manuscript*

Metadata Fields page in PolicyManager. Select/Check the field(s) to display on the Transmittal form for all submissions.

Partial page display; four new fields added:



Once the new fields have been selected for inclusion on the Transmittal Form, the display order of these fields may be updated on the *Edit Transmittal Form Layout* page in PolicyManager.

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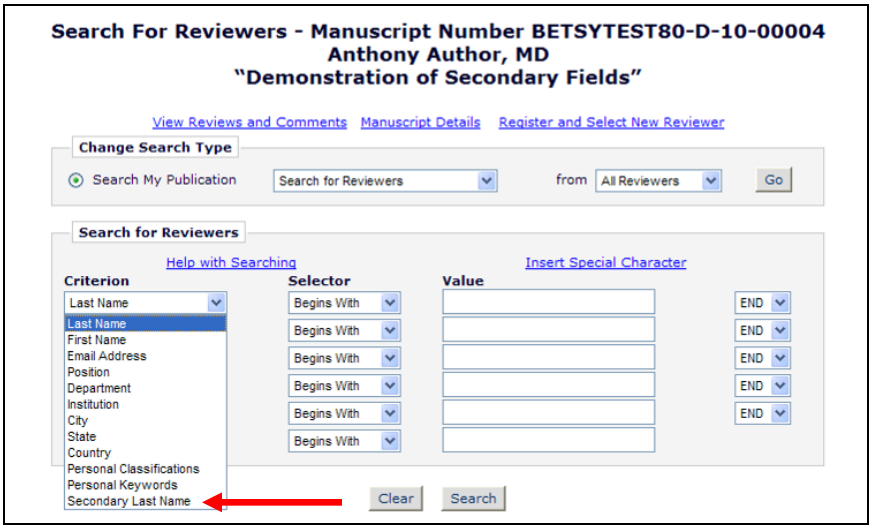
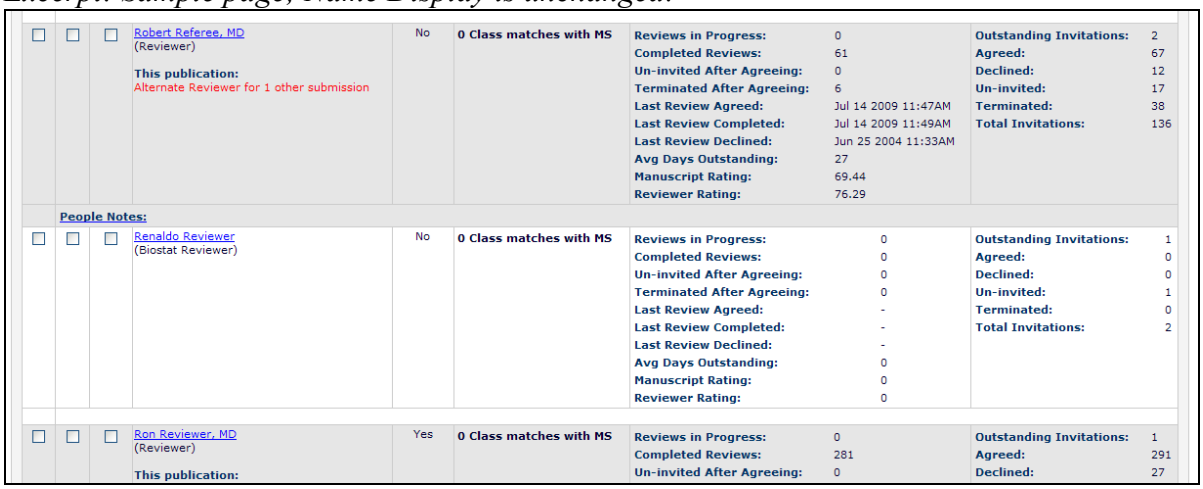
Search for Reviewers Enhancements

A new criterion is available in EM v8.0 for use in searching for Reviewers. New in v8.0, Publications may allow users to include Secondary identifying information (such as a Secondary First Name or Secondary Last Name) in their registration information (or registration record). The existing *Search for Reviewers* page now allows Editors to search on a Reviewer's 'Secondary Last Name' when 'Secondary Last Name' is not set as 'Hidden' on the *Edit Registration Fields* page (see the "Allow Secondary Name and Address Information" of these Release Notes for more information).



Though available for use in searching, the 'Secondary Last Name' is not displayed on the results page. The results page displays the Reviewer Name per the existing format (concatenation of First Name, Last Name and Degree).

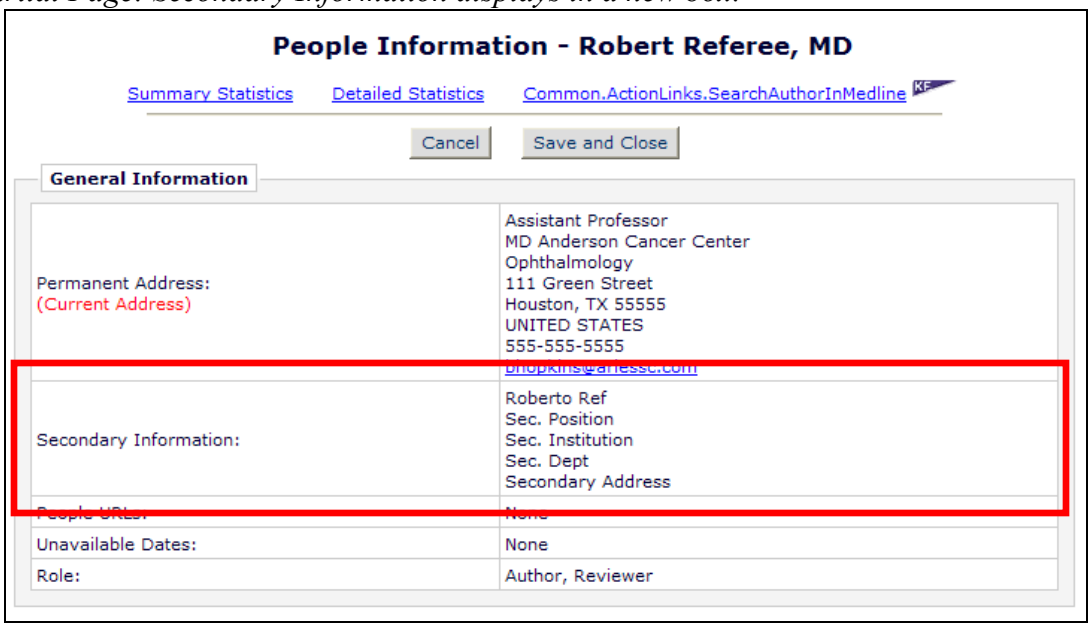
Excerpt: Sample page; Name Display is unchanged:



Any Secondary information entered by the Reviewer may be seen on the *People Information* page, accessed by clicking a person's hyperlinked name. NOTE: This

information is also available for any registered user, by clicking a person's hyperlinked name from the *Search People* results page, and then clicking the 'Activity Details' button on the *Search People – Update Information* page.

Partial Page: Secondary Information displays in a new box:



TO CONFIGURE:
See the "Allow Secondary Name and Address Information" section of these Release Notes for information on enabling Secondary Fields. When the 'Secondary Last Name' field is configured to display on the *Edit Registration Fields* page (set as not hidden, and either required or optional), then the 'Secondary Last Name' appears as a Reviewer Search criterion.

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Automatically Reassigning the Corresponding Editor Designation

In Editorial Manager, each submission may have one Editor designated as the primary editorial contact, referred to as the "Corresponding Editor". The Corresponding Editor is commonly used as the recipient or sender for various letters regarding the submission, and their information can be inserted into letters using Corresponding Editor merge fields. Many publications choose to keep the same Corresponding Editor for the life of the submission, regardless of who is currently handling the paper.

In current functionality, the first assigned Editor is automatically designated as the Corresponding Editor for the submission when that Editor is assigned to the manuscript. If a user wants to change the Corresponding Editor, they must go to the *Details* page and choose the new Corresponding Editor from a dropdown selector (if they have the appropriate permission), which is populated with all Editors that have been assigned to the submission.

New in EM v8.0, Publications are given the opportunity to enable a different Corresponding Editor workflow, where the Corresponding Editor designation will automatically change when responsibility for the paper changes hands. When this new feature is enabled, the person currently responsible for the paper will also be the Corresponding Editor (i.e., the Corresponding Editor more closely tracks the current Handling Editor).

A new feature is available in v8.0, allowing the Corresponding Editor assignment functionality to be extended to automatically move the Corresponding Editor designation with all subsequent Editor assignments for the submission according to the following:

1. If the selected Editor is configured to receive submissions via assignment, then the Corresponding Editor designation is set when the submission is assigned.
2. If the selected Editor is configured to receive submissions via invitation, the Corresponding Editor designation is set when/if the Editor accepts the invitation. NOTE: In this case, the invited Editor is considered to be the Handling Editor on invitation, but not the Corresponding Editor until the invitation is accepted; this is the only case where the two do not match.

This new functionality works the same way should an Editor assignment be rolled back, or if an Editor is unassigned and a new Editor assigned. When this feature is enabled, the Corresponding Editor designation travels with the Handling Editor.

When an Editor makes a decision in EM, responsibility for the submission gets passed back up the assignment chain, in reverse order, skipping certain editors if configured to do so. When this new feature is enabled, the Corresponding Editor designation is also transferred back up the chain (skipping certain Editors, if applicable) with the submission.

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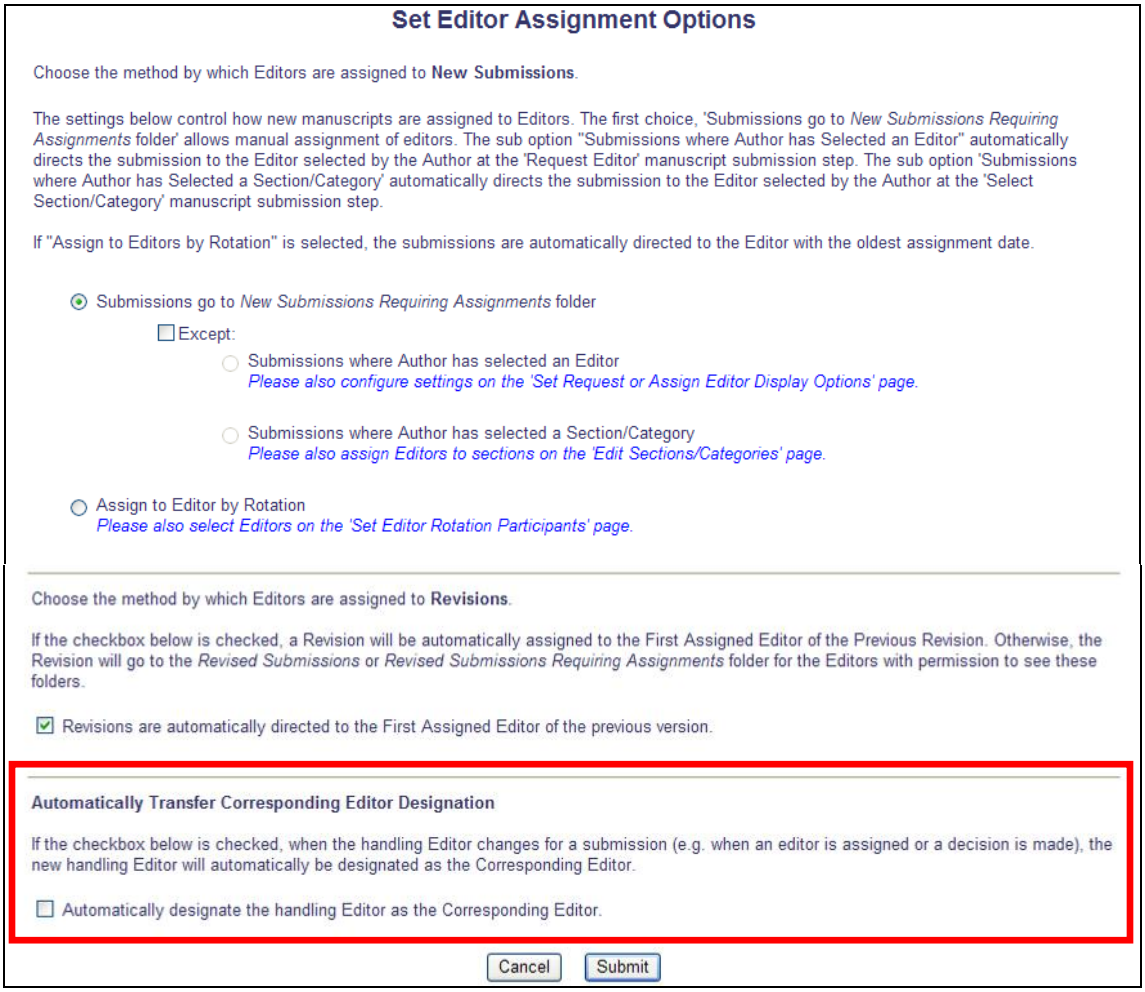
NOTE: For Editors with the "Change Corresponding Editor" permission, once there has been more than one Editor assigned to a submission, a dropdown is shown on the *Details* page where the Editor may select a different Corresponding Editor. This functionality is unchanged if the new feature is enabled, but when the paper changes hands again, this selection will be overridden in favor of the new Handling Editor. The dropdown is still available on *Details* should the editorial office wish to manually change the Corresponding Editor again.

TO CONFIGURE:
Publications wishing to use this feature will find a new setting in PolicyManager on the *Set Editor Assignment Options* page. A new section is added to the bottom of this page where publications may enable the "Automatically designate the handling Editor as the Corresponding Editor." option.



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Attachments – Editor View

Currently in EM, Reviewers may be given permission to upload non-submission files as part of their review, such as images or related materials. There are occasions where a Reviewer forgets to attach files and sends them in a separate e-mail to the Editorial Office, and the EO then needs to attach them to the Review. There may also be times when an Editor wishes to include an Attachment for Reviewers to use as a tool for completing their Reviews. New in EM/PM v8.0, the Reviewer Attachments feature is expanded to allow Editors to upload attachments as well at various points in the Editorial process. These are now collectively referred to as 'Attachments', rather than 'Reviewer Attachments' or 'Editor Attachments'.

The existing Editor RoleManager permissions 'Download Reviewer Attachments' and 'Edit Reviewer Attachments' are relabeled and expanded in functionality. 'Download Reviewer Attachments' is now labeled 'Download Attachments'. Editors with this permission enabled my download attachments uploaded by either Reviewers, or by other Editors.

'Edit Reviewer Attachments' is now called 'Upload Attachments'. Editors with this permission have the ability to download attachments uploaded by Reviewers or other Editors, to replace those files with a revised version of the file, and to upload a new attachment.

Editors with the 'Upload Attachments' permission enabled now have the option of uploading an Attachment prior to inviting Reviewers to review a submission. A new 'Attachments' link is added to the default *Editorial Details* page for this purpose. This link is also available for inclusion on custom *Details* pages; publications using custom *Details* layouts will need to manually update these layouts in PolicyManager.

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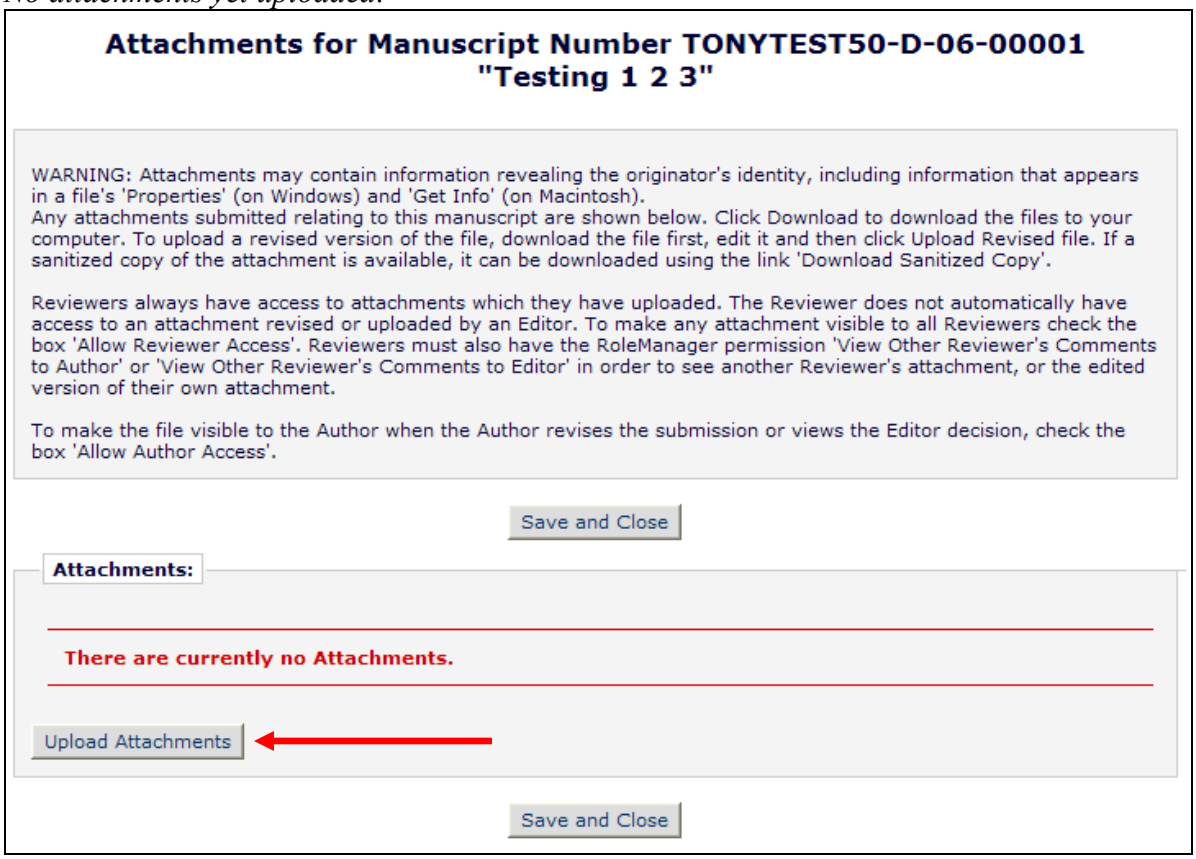
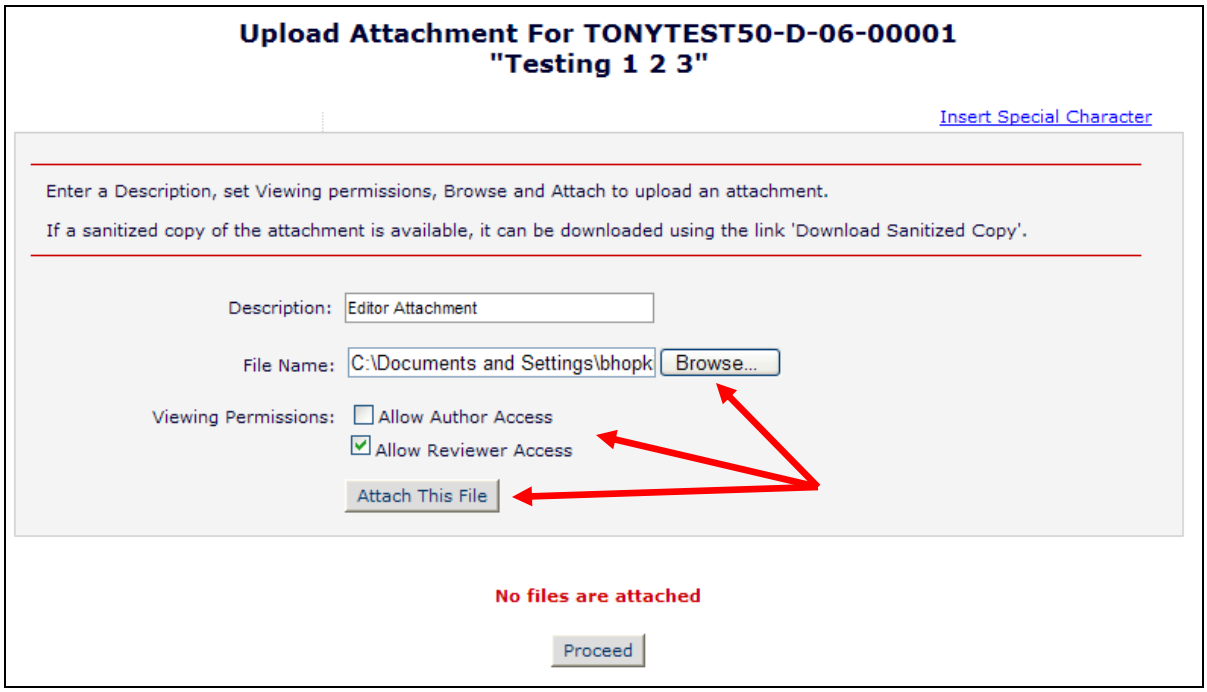
Partial page display:

Clicking the 'Attachments' link opens the *Attachments* pop-up page for the Editor. Any existing attachments are displayed in the bottom area. If there are no attachments yet, the message "There are currently no Attachments" displays. To attach a file, the Editor clicks the 'Upload Attachment' button.

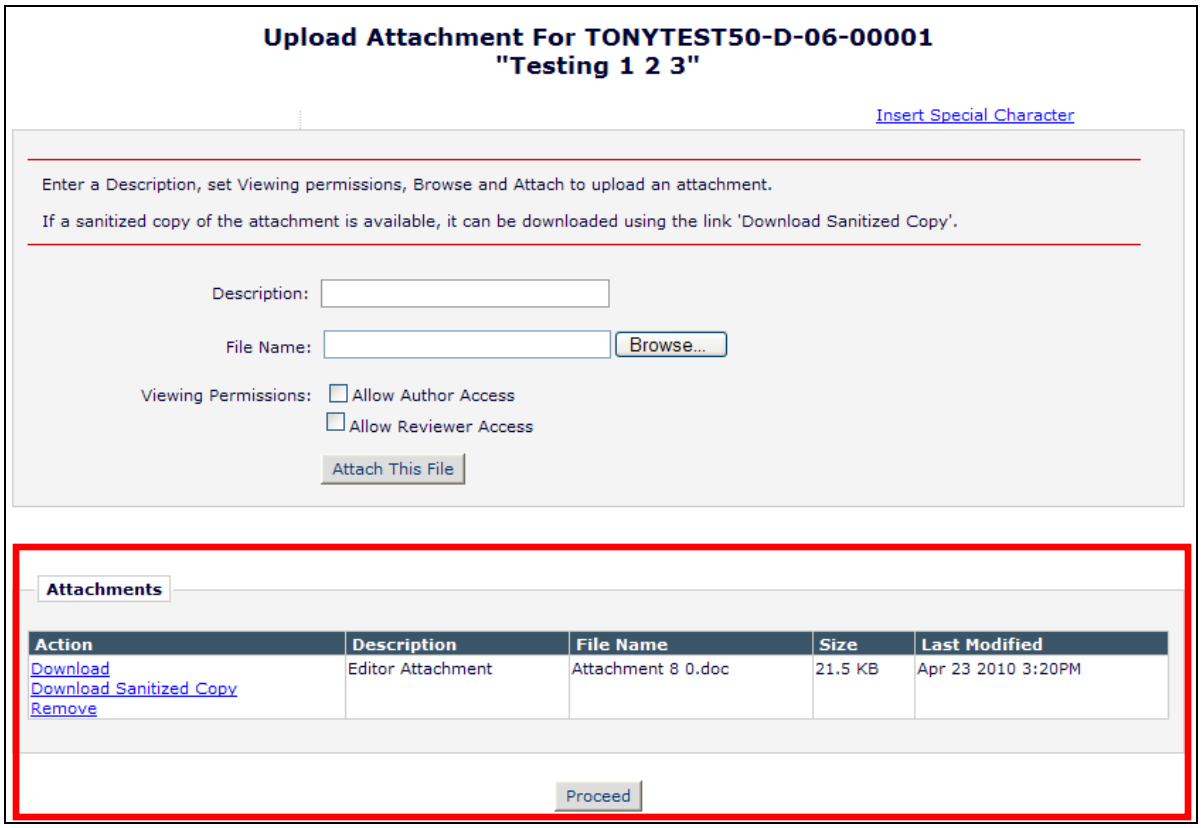
No attachments yet uploaded:



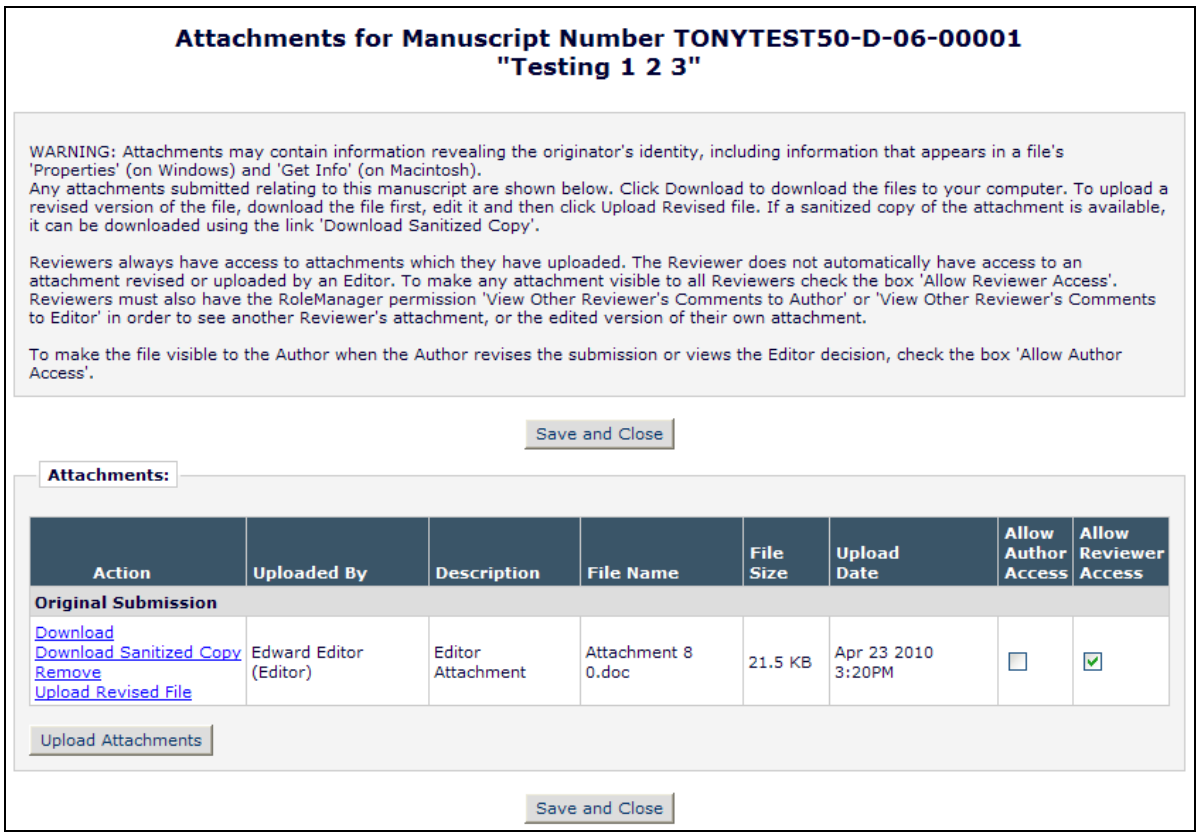
In the *Upload Attachment* window, Editors may enter a Description of the file, use the 'Browse…' button to locate the file, and determine the Viewing Permissions; is this attachment for Reviewers only, for Authors only, or for both? If neither option is selected, the Attachment will only be available for other Editors with 'Download Attachments' or 'Upload Attachments' permission. Clicking the 'Attach this File' button completes the file upload process.



After uploading the file, it displays at the bottom of the page. If the Editor has uploaded the wrong file, s/he can use the 'Remove' link to remove the file on this page. Clicking the 'Proceed' button returns the Editor to the *Attachments* page.



The *Attachments* page now displays the attachment(s) available for this submission. The Editor may change viewing properties here, upload a revised version of the file, or remove it.



Attachments for Manuscript Number TONYTEST50-D-06-00001
"Testing 1 2 3"

WARNING: Attachments may contain information revealing the originator's identity, including information that appears in a file's 'Properties' (on Windows) and 'Get Info' (on Macintosh).
Any attachments submitted relating to this manuscript are shown below. Click Download to download the files to your computer. To upload a revised version of the file, download the file first, edit it and then click Upload Revised file. If a sanitized copy of the attachment is available, it can be downloaded using the link 'Download Sanitized Copy'.

Reviewers always have access to attachments which they have uploaded. The Reviewer does not automatically have access to an attachment revised or uploaded by an Editor. To make any attachment visible to all Reviewers check the box 'Allow Reviewer Access'. Reviewers must also have the RoleManager permission 'View Other Reviewer's Comments to Author' or 'View Other Reviewer's Comments to Editor' in order to see another Reviewer's attachment, or the edited version of their own attachment.

To make the file visible to the Author when the Author revises the submission or views the Editor decision, check the box 'Allow Author Access'.

Save and Close

Attachments:

Action	Uploaded By	Description	File Name	File Size	Upload Date	Allow Author Access	Allow Reviewer Access
Original Submission							
Download Download Sanitized Copy Remove Upload Revised File	Edward Editor (Editor)	Editor Attachment	Attachment 8 0.doc	21.5 KB	Apr 23 2010 3:20PM	☐	☑

Upload Attachments

Save and Close

TO CONFIGURE:
Publications that already use 'Reviewer Attachments' will continue to have 'Attachments' enabled for their publication. If your publication would like to enable the Attachments feature for your publication, contact your Aries representative.

For publications already using Reviewer Attachments, the Editor permissions in RoleManager are enhanced:

- 'Download Reviewer Attachments' is now 'Download Attachments'– this permission allows the Editor to download any Attachments uploaded by a Reviewer or by another Editor.
- 'Edit Reviewer Attachments' is now 'Upload Attachments' – this permission allows the Editor to download an attachment, to upload a revised version of an attachment (uploaded by a Reviewer or Editor), and to upload a new attachment on the *Attachments* and *Notify Author* pages.
- The existing settings for these permissions are carried forward on upgrade.

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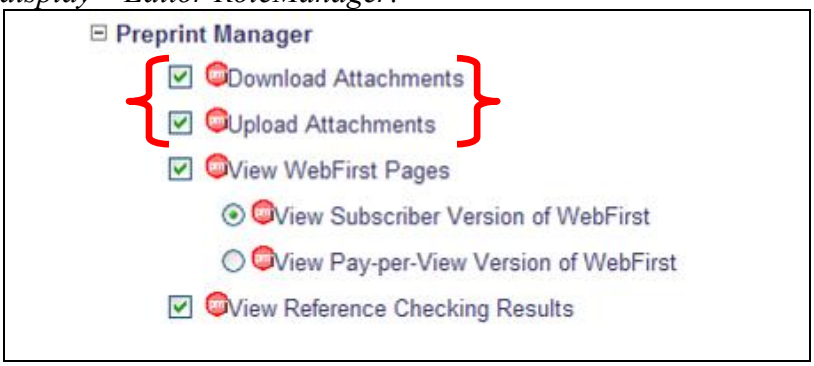
Partial page display – Editor RoleManager:



Publications can also customize the instructions that display on the following pages where Attachments may be uploaded or viewed:

1. *Upload Attachments* (for Reviewers)
2. *Upload Revised File / Attachments*
3. *Attachments* (for Editor)
    - Two sets of instructions are used on his page, displayed depending on the Editor's specific attachment permission
4. *Notify Author*

Instructions are customized in PolicyManager, on the existing *Edit Instructions for Attachments* page. For publications using Reviewer Attachments in v7.3 and earlier, any customized instructions are retained at upgrade.

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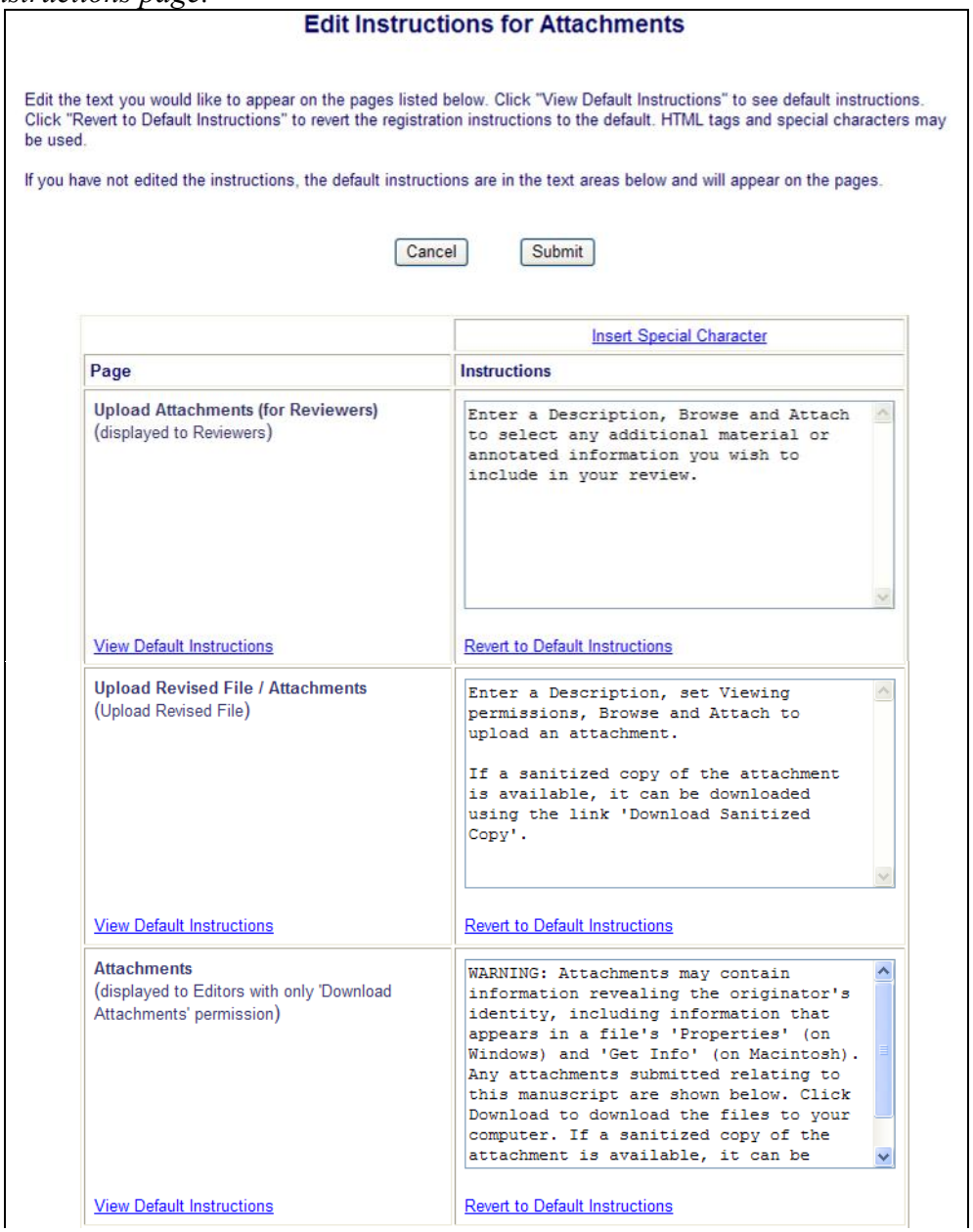
Edit Instructions page:



[CONTINUED ON NEXT PAGE]

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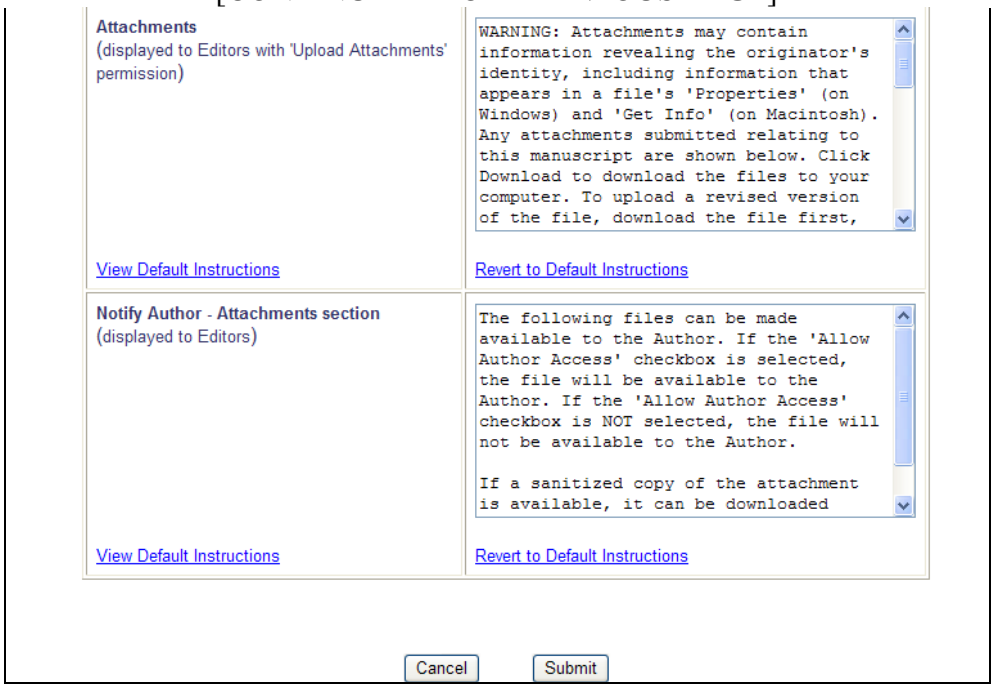
[CONTINUED FROM PREVIOUS PAGE]



After customizing instructions on this page, Submit the page to save changes to the system.

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Attachments – Reviewer View

After an Editor uploads an attachment, when they are inviting a Reviewer, they can add the new %ATTACH_FOR_REVIEWER_DEEP_LINK% and %ATTACH_FOR_REVIEWER_DEEP_LINK_INSTRUCTIONS% to the Invitation letter. The %ATTACH_FOR_REVIEWER_DEEP_LINK% merge field will insert a deep link allowing the Reviewer direct access to the *Attachments* page where they may view any attachments entered by the Editor.

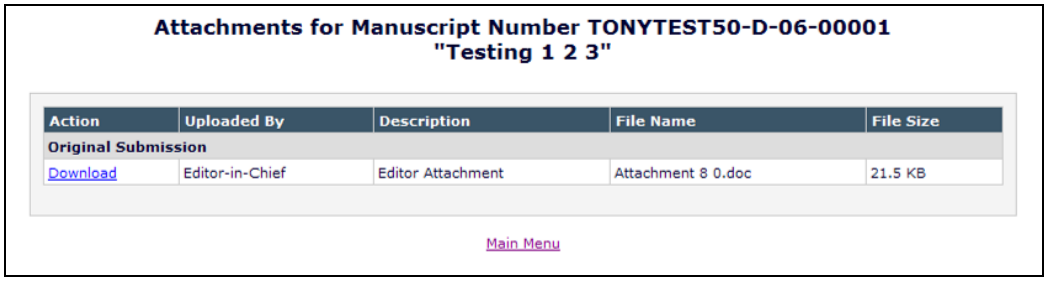
Reviewers also now have a new "View Attachments" Action Link located in the following folders:

- New Reviewer Invitations
- Pending Assignments
- Completed Assignments

The link only displays when there are Attachments available for the Reviewer to see.

New Reviewer Invitations with 'View Attachments' link:

Clicking the 'View Attachments' link brings the Reviewer to the *Attachments* page. Any attachments that have been configured to "Allow Reviewer Access" are displayed on this page. The Reviewer may Download the file from here.



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TO CONFIGURE:
Publications that already use ‘Reviewer Attachments’ will continue to have ‘Attachments’ enabled for their publication. If your publication would like to enable the Attachments feature for your publication, contact your Aries representative.

For publications with ‘Attachments’ enabled, no additional configuration is required to allow Reviewers access to view attachments.

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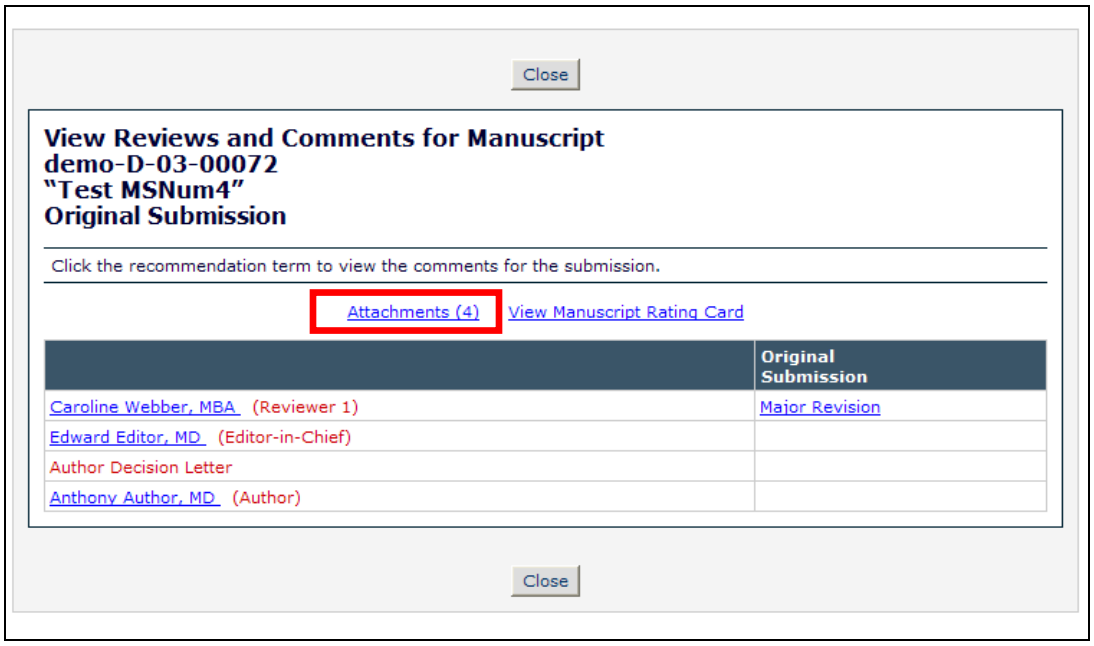
Attachments – Editor View of Submitted Review

Once a Reviewer has submitted their recommendation, Editors may download, remove or edit Reviewer-uploaded Attachments, or upload their own Attachments (governed by Editor RoleManager permissions) when submitting a Decision. This means that an Editor has control over which (if any) Attachments will go to the Author as part of the Decision Letter.

After a Review is submitted, the Editor can access all Reviewer-uploaded Attachments via an 'Attachments' link found on the following pages:

- *Details*
- *View Reviews and Comments*
- *Submit Editor's Decision and Comments*



Editors may also view Attachments uploaded with a Reviewer Recommendation or an Editor Decision by clicking the individual recommendation/decision term from the *View Reviews and Comments* page.

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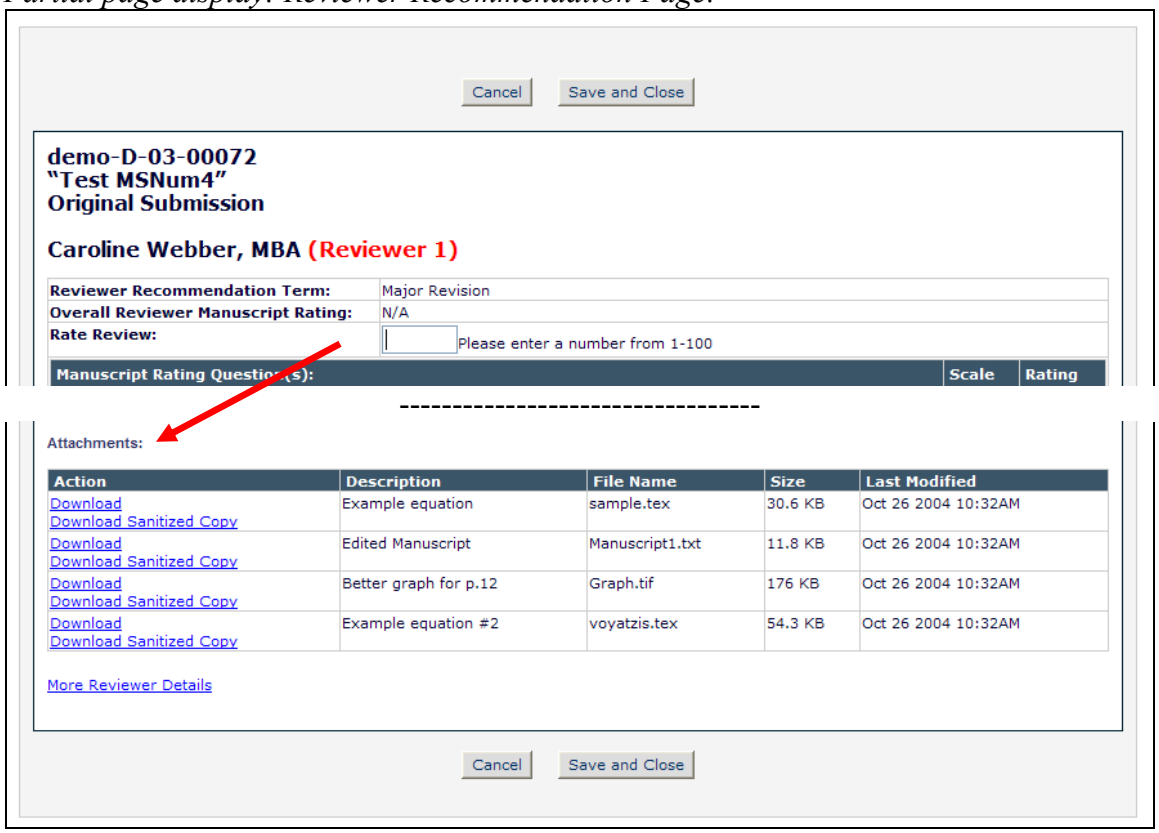
Partial page display: Reviewer Recommendation Page:



The Editor can download Reviewer-attached files, upload edited files, or upload new Attachments.

For any file uploaded by the Editor (either by clicking 'Upload Revised File' on a Reviewer-uploaded attachment, or by clicking the 'Upload Attachments' button), the

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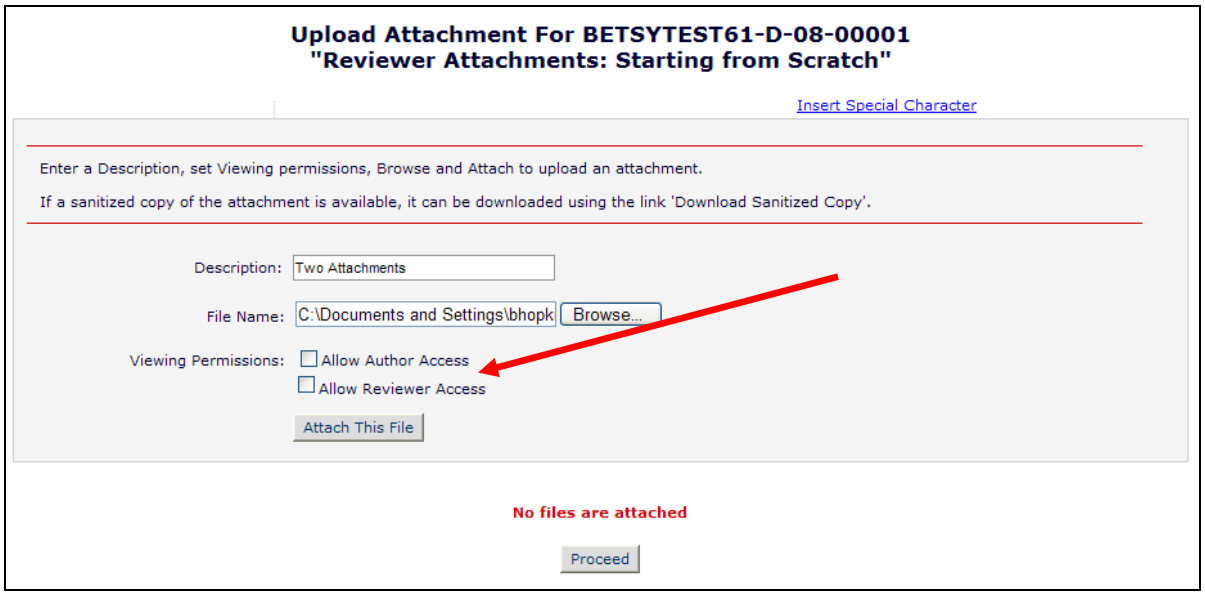
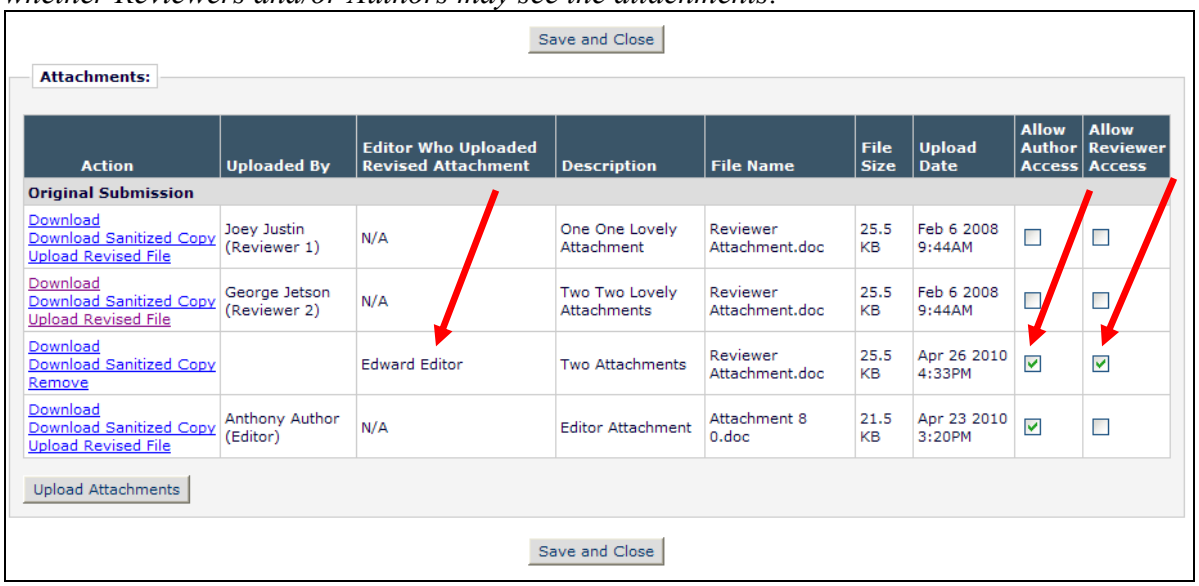
Editor can allow the Author and/or Reviewer access to the file by clicking the checkboxes labeled ‘Allow Author Access’ and/or ‘Allow Reviewer Access’.



Any revised file uploaded by the Editor is clearly indicated in the grid that displays all Attachments.

Partial Attachments *page display; Revised Attachment is identified; Editor may select whether Reviewers and/or Authors may see the attachments:*



For Editors with permission to notify the Author of a decision, when that Editor also has ‘Upload Attachments’ permission, they may make a final decision on which Attachments the Author may view. This is done on the *Notify Author* page.

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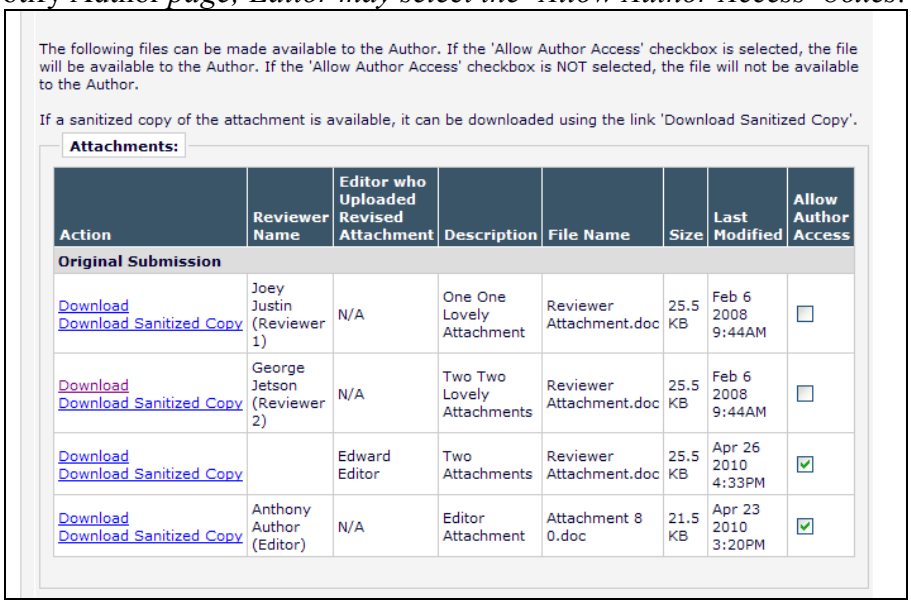
Partial Notify Author *page; Editor may select the 'Allow Author Access' boxes:*



The following files can be made available to the Author. If the 'Allow Author Access' checkbox is selected, the file will be available to the Author. If the 'Allow Author Access' checkbox is NOT selected, the file will not be available to the Author.

If a sanitized copy of the attachment is available, it can be downloaded using the link 'Download Sanitized Copy'.

Attachments:

Action	Reviewer Name	Editor who Uploaded Revised Attachment	Description	File Name	Size	Last Modified	Allow Author Access
Original Submission							
Download Download Sanitized Copy	Joey Justin (Reviewer 1)	N/A	One One Lovely Attachment	Reviewer Attachment.doc	25.5 KB	Feb 6 2008 9:44AM	☐
Download Download Sanitized Copy	George Jetson (Reviewer 2)	N/A	Two Two Lovely Attachments	Reviewer Attachment.doc	25.5 KB	Feb 6 2008 9:44AM	☐
Download Download Sanitized Copy		Edward Editor	Two Attachments	Reviewer Attachment.doc	25.5 KB	Apr 26 2010 4:33PM	☑
Download Download Sanitized Copy	Anthony Author (Editor)	N/A	Editor Attachment	Attachment 8 0.doc	21.5 KB	Apr 23 2010 3:20PM	☑

TO CONFIGURE:
Publications that already use 'Reviewer Attachments' will continue to have 'Attachments' enabled for their publication. If your publication would like to enable the Attachments feature for your publication, contact your Aries representative.

To allow Editors to view Attachments, enable 'Download Attachments' permission in RoleManager. To allow Editors to download and upload Attachments, enable 'Upload Attachments' permission in RoleManager.

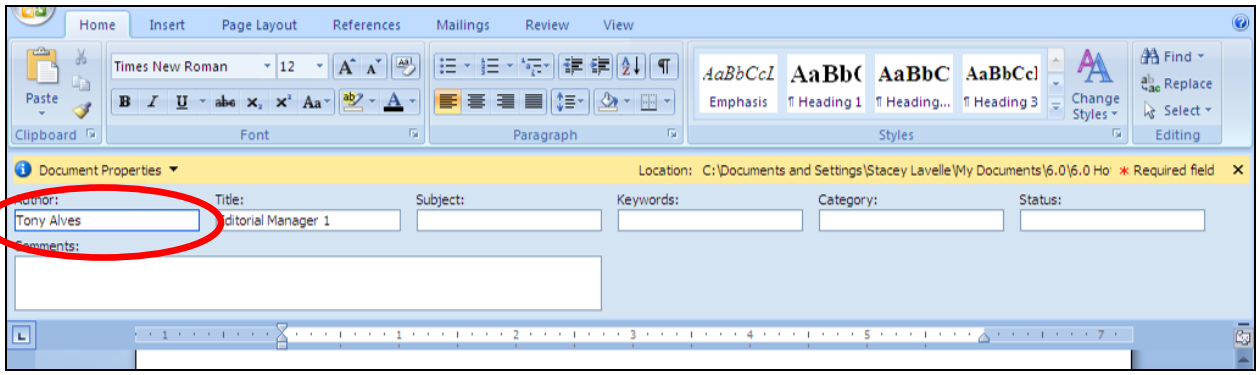
NOTE: The 'Upload Attachments' permission implicitly includes 'Download Attachments' permission. If an Editor has 'Upload Attachments' permission enabled, they are able to perform any and all actions that are tied to 'Download Attachments'.

Attachment Security

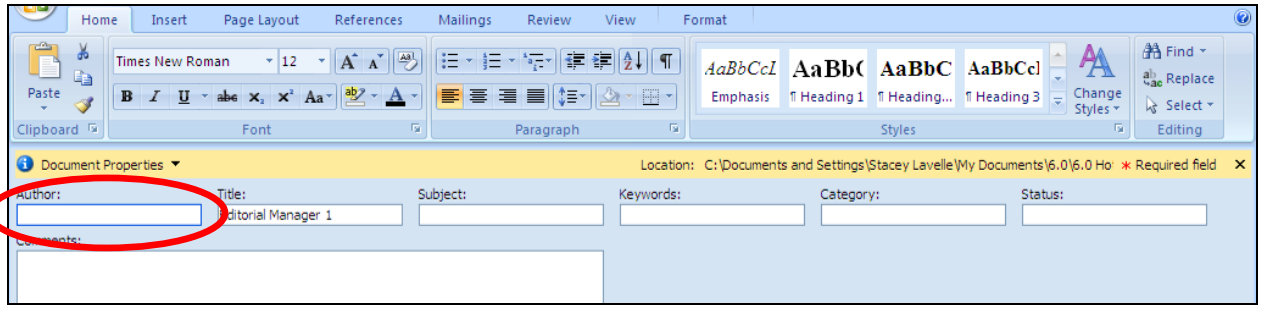
New in EM/PM v8.0, Editors may be given permission to upload Attachments associated with a decision, or on behalf of a Reviewer. This functionality is added to the existing Reviewer Attachments functionality. As with attachments uploaded by Reviewers, there is a risk that files uploaded by Editors may contain identifying information, such as information about a Reviewer (such as the Reviewer's name) in the event an Editor is uploading an attachment on behalf of the Reviewer. If the file is subsequently sent to the Author, the Author may be able to find out the identity of the Reviewer.

Prior versions of EM/PM have a feature called 'Configure Reviewer Attachment Security', which allowed Reviewer uploaded attachments to be "sanitized", removing personal information appearing in the document properties of a Microsoft Office or PDF file. New in v8.0, this functionality is extended to cover all Attachments.

Unsanitized Word Document



Sanitized Word Document



The ability to sanitize Attachments is configurable in PolicyManager. For publications already using this feature, the settings will be retained on upgrade. For new users of the Attachments feature, the default setting is not to sanitize existing or new attachments. If the publication makes the choice to sanitize the attachments, when an Attachment is uploaded, a copy of the attachment is made with the personal information removed. Sanitization can be done only for Microsoft Office files (Word, Excel and PowerPoint) and PDFs.

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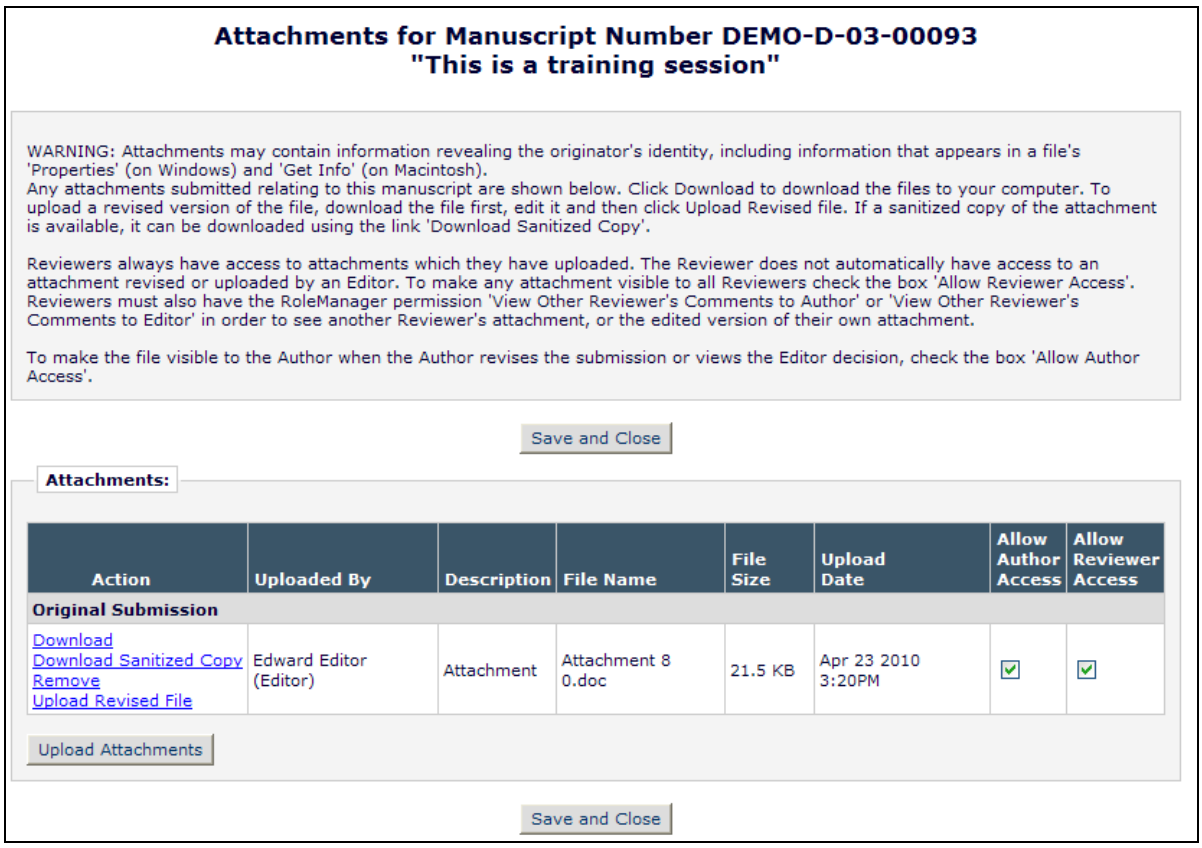
- If a sanitized version is required and the file format allowed the creation of a sanitized version, the Author is always presented with the sanitized version (if he has permission to view the Attachment(s)).
- The original file is not removed from the system; the publication can make the choice to present Reviewers with sanitized or original (unsanitized) copies of attachments.
- If a sanitized version is available, Editors may download the sanitized version using a new Download Sanitized Copy link on the *View Attachments* page. NOTE: The original unsanitized version is also available to Editors via the Download link.
- If a sanitized version is not available, and the user viewing the attachment is required to view the sanitized version, the sanitization job is run when the user clicks the Download link.
- If the attachment is a MS Office file, EM removes the personal information in the document's 'Properties' setting. This also removes author information from 'Track Changes' remarks and comments/bubbles.
- If the attachment is a PDF file, personal information will be removed from the 'Properties' of the PDF file, and the 'Author' value (recorded in the properties of an annotation) will be nulled out.



Attachments for Manuscript Number DEMO-D-03-00093
"This is a training session"

WARNING: Attachments may contain information revealing the originator's identity, including information that appears in a file's 'Properties' (on Windows) and 'Get Info' (on Macintosh).
Any attachments submitted relating to this manuscript are shown below. Click Download to download the files to your computer. To upload a revised version of the file, download the file first, edit it and then click Upload Revised file. If a sanitized copy of the attachment is available, it can be downloaded using the link 'Download Sanitized Copy'.

Reviewers always have access to attachments which they have uploaded. The Reviewer does not automatically have access to an attachment revised or uploaded by an Editor. To make any attachment visible to all Reviewers check the box 'Allow Reviewer Access'. Reviewers must also have the RoleManager permission 'View Other Reviewer's Comments to Author' or 'View Other Reviewer's Comments to Editor' in order to see another Reviewer's attachment, or the edited version of their own attachment.

To make the file visible to the Author when the Author revises the submission or views the Editor decision, check the box 'Allow Author Access'.

Save and Close

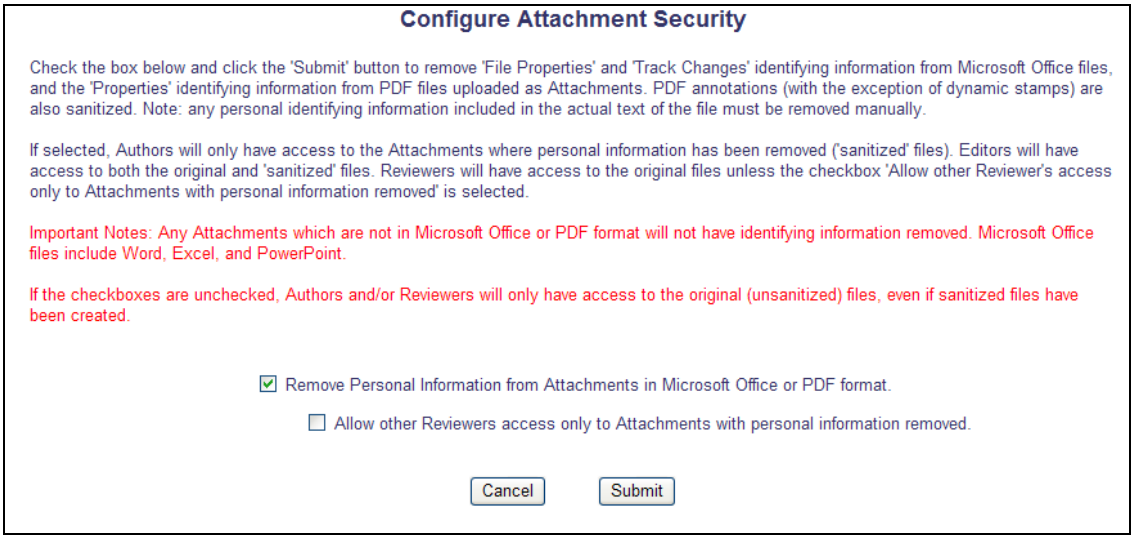
Attachments:

Action	Uploaded By	Description	File Name	File Size	Upload Date	Allow Author Access	Allow Reviewer Access
Original Submission							
Download Download Sanitized Copy Remove Upload Revised File	Edward Editor (Editor)	Attachment	Attachment 8 0.doc	21.5 KB	Apr 23 2010 3:20PM	☑	☑

Upload Attachments

Save and Close

TO CONFIGURE:
Go to the *Configure Attachment Security* page in PolicyManager. Select the checkbox 'Remove Personal Information from Attachments in Microsoft Office or PDF format.' Once this checkbox has been selected, the subsidiary checkbox 'Allow other Reviewers access only to Attachments with personal information removed.' will become active and can be selected. Click the 'Submit' button to confirm your selections.



NOTE: If the publication selects one or both of the checkboxes, uses the feature for a while, and then decides to stop using the feature, the original (unsanitized) file will be displayed to the end user, even if the sanitized copy exists.

Attachment Deep Link Enhancements

New in EM/PM v8.0, the Reviewer Attachments feature is expanded to allow Editors to include Attachments. The existing Reviewer Attachment deep links are enhanced in v8.0 to accommodate the expanded use of Attachments.

Four new merge fields are added. All four new merge fields are available for use in any letter (Ad Hoc, Invitation, etc.).

1. %ATTACH_FOR_AUTHOR_DEEP_LINK% is introduced and functions the same as the existing %REVIEWER_ATTACH_DEEP_LINK%. This link is intended for use in letters to Authors. When inserted into an Author e-mail, a deep link is inserted into the letter that is a direct link to the Author's *Attachments* page. The Author is fully logged into EM.
   The deep link only populates if there are Attachments which have been made available to the Author.
   NOTE: The old %REVIEWER_ATTACH_DEEP_LINK% merge field will continue to function, however the new link should be used for new letters.
2. %ATTACH_FOR_AUTHOR_DEEP_LINK_INSTRUCTIONS% is introduced and functions the same as the existing %REVIEWER_ATTACH_DEEP_LINK_INSTRUCTIONS%. This link is intended for use in letters to Authors. When inserted into an Author e-mail, this merge field pulls in any custom instructions entered on the *Set Attachments Deep Link Policy* page in PolicyManager.
   This merge field only populates if there are Attachments which have been made available to the Author.
   NOTE: The old %REVIEWER_ATTACH_DEEP_LINK_INSTRUCTIONS% merge field will continue to function, however the new link should be used for new letters.
3. %ATTACH_FOR_REVIEWER_DEEP_LINK% is intended for use in letters to Reviewers. When inserted into a Reviewer e-mail, a deep link is inserted into the letter that is a direct link to the Reviewer's *Attachments* page. The Reviewer is fully logged into EM.
   This merge field only populates if there are Attachments which have been made available to the Reviewer.
4. %ATTACH_FOR_REVIEWER_DEEP_LINK_INSTRUCTIONS% is intended for use in letters to Reviewers. When inserted into a Reviewer e-mail, this merge field pulls in any custom instructions entered on the *Set Attachments Deep Link Policy* page.
   This merge field only populates if there are Attachments which have been made available to the Reviewer.

TO CONFIGURE:

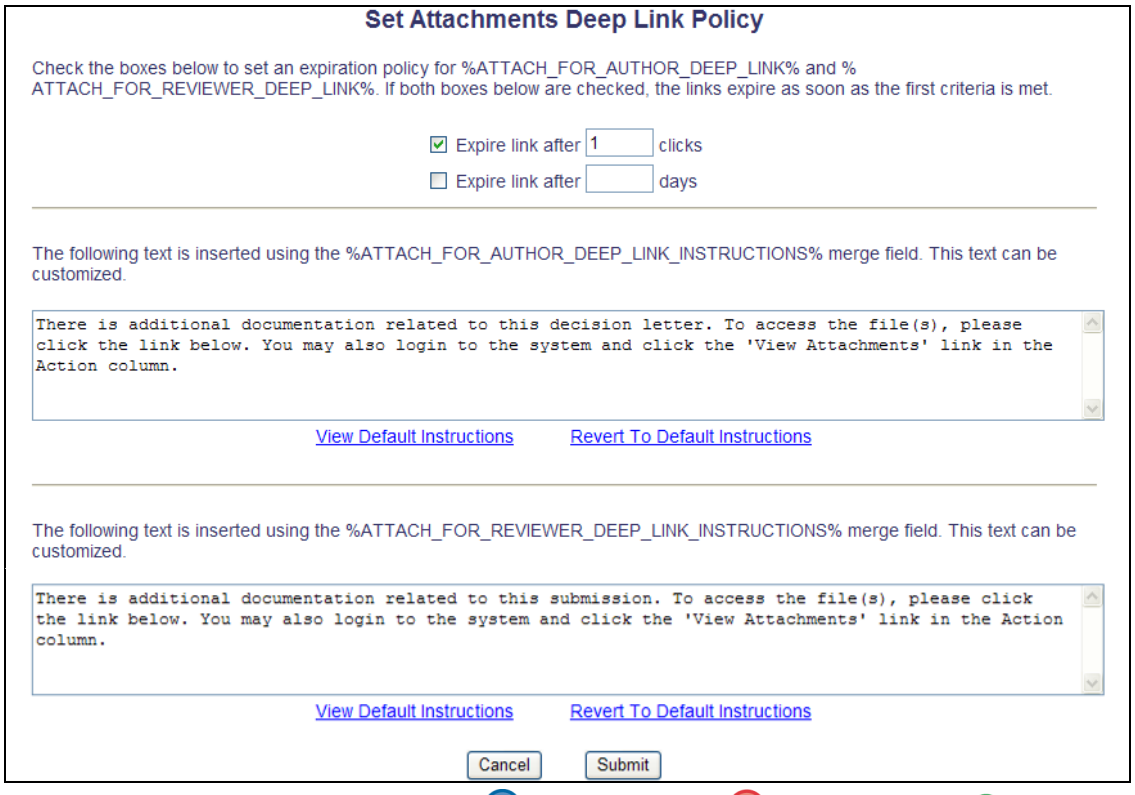
To take advantage of this feature, the publication must have the Attachments feature enabled (this is a Preprint Manager feature). This feature must be enabled by your Aries' Customer Service Representative.

Publications using the Attachments feature may insert instructions that are inserted for either the %ATTACH_FOR_AUTHOR_DEEP_LINK_INSTRUCTIONS% or %ATTACH_FOR_REVIEWER_DEEP_LINK_INSTRUCTIONS% merge fields. An expiration policy is also configurable for the %ATTACH_FOR_AUTHOR_DEEP_LINK% and %ATTACH_FOR_REVIEWER_DEEP_LINK% deep links.

To configure the custom instructions or set the deep link expiration policy, click the Set Attachments Deep Link Policy link in the Preprint Manager section of PolicyManager. Specify the expiration policy for the deep links (i.e. how long the link is active):

- Publications already using the 'Reviewer Attachments' feature will have their expiration policy settings retained on upgrade.
- For new users, the option 'Expire link after 1 clicks' is selected by default.
- If neither option is selected (both boxes are unchecked), the deep link will remain active indefinitely.

Create customized instructions for the Attachment deep links here, as well. The default instructions are shown in the image below.



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To add the merge fields to letters, go to ‘Edit Letters’ in PolicyManager. Select the letter you wish to edit, or create a new letters. Insert the merge fields in the desired letters.

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Submit Decision and Notify Author Enhancements

In EM v7.3, following an Editor Decision, the system would always complete the Editor Assignment before displaying the *Notify Author* page, triggering any associated notifications and status changes. This could create a situation where the Editor who submitted the decision would be working on the Notification letter while the higher-level Editor could start to submit his/her own decision.

New in v8.0, this functionality has been improved so that if an Editor submits a decision on which they are allowed to notify the Author, then the Editor assignment remains open until either the Editor sends the Decision Letter to the Author, or the Editor explicitly chooses to submit the Decision without sending the letter, moving the submission up the Decision Chain. The Author Notification step now becomes part of the Submit Decision workflow, not a separate stage following it.

In addition, Editor Roles can now be configured so that they may only notify the Author when submitting a decision, and this can be further refined to allow Editors to notify the Author of some decisions, but not others.

Changes to 'Notify Author' permissions:

In EM v7.3, Editor Roles may be given permission to 'Notify Author of the Editor's Decision'. This one permission gives access to the *Notify Author* page in two possible ways, allowing the Editor to notify the Author of a decision:

1. An Editor with the 'Notify Author...' permission submits a decision; on submitting the decision the system completes the Editor assignment and then automatically opens the *Notify Author* page.
2. An Editor with the 'Notify Author...' permission clicks on a Notify Author action link in either the 'My Assignments with Decision' folder or the 'All Submissions with Editor's Decision' folder.

New in EM v8.0, changes are made to the 'Notify Author' functionality to allow more flexibility when Editors are ready to send decisions.

The existing 'Notify Author of Editor's Decision' permission is now split into two separate permissions, corresponding to the two different cases above:

1. A new 'Notify Author after Making a Decision' permission is added. This permission now controls whether the Editor is taken directly to the *Notify Author* page after submitting a decision.
2. The existing permission is relabeled 'Notify Author of Editor's Decision when Editor Chain is Complete'. This permission now only controls display of the Notify Author action link in folders.

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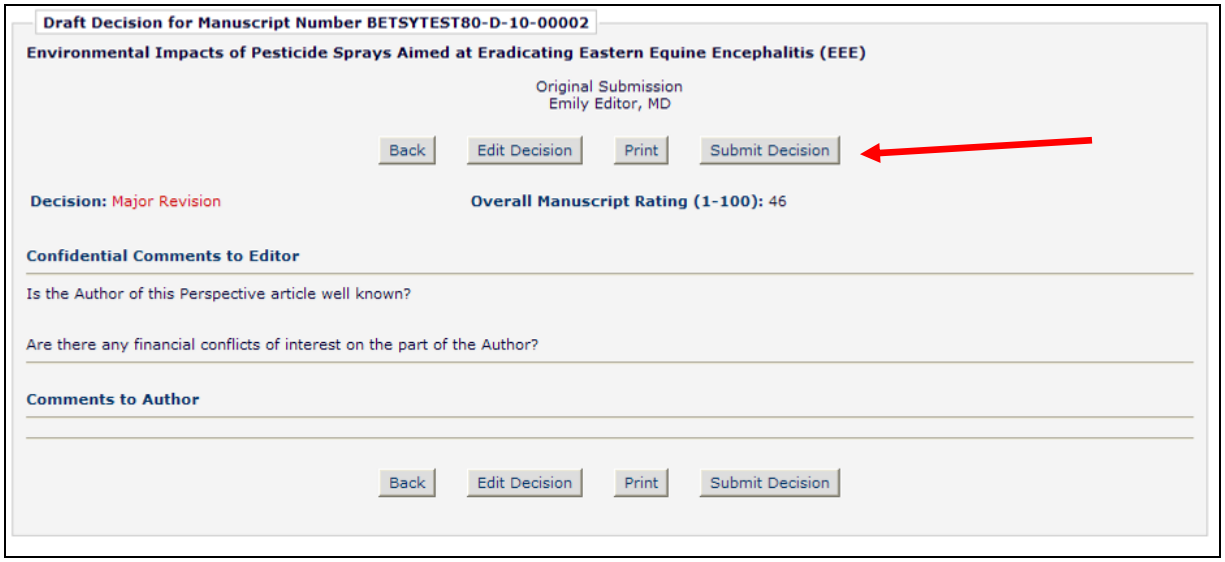
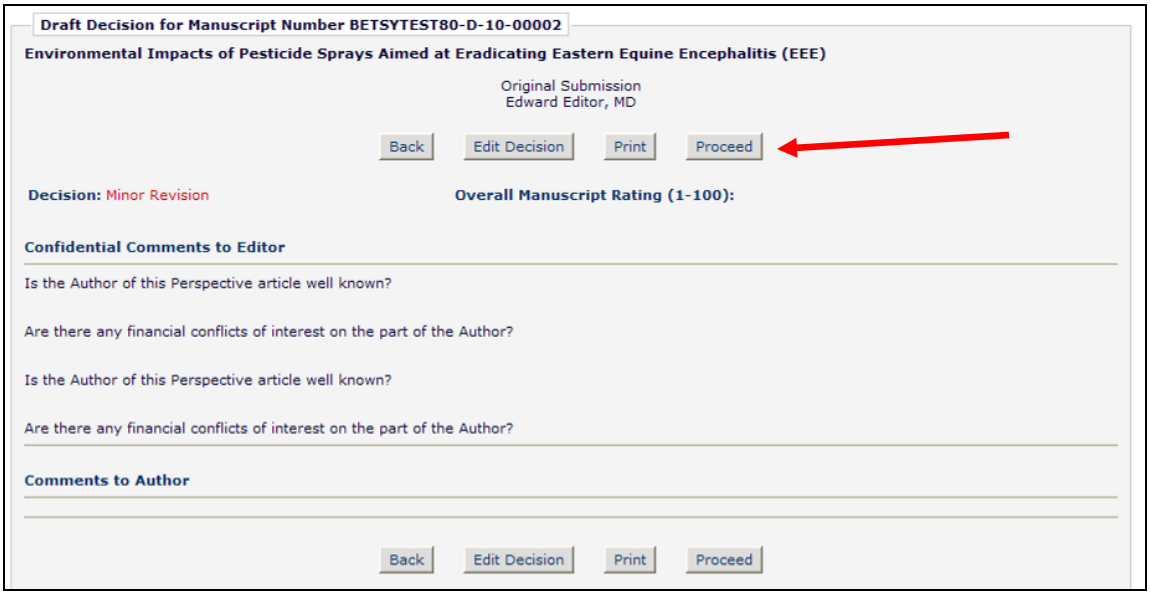
Separating the previous, single permission into two separate options means that publications can allow an Editor to notify an Author as part of their decision making process, but prevent them from being able to notify the Author once all Editors above them in the chain have made a decision.

When an Editor submits a decision where they do not have permission to notify the Author, the *Draft Decision* page will display a 'Submit Decision' button. Clicking this button will submit the Editor's decision, and close their assignment.



When an Editor submits a decision where they do have permission to notify the Author, the *Draft Decision* page displays a 'Proceed' button. This button indicates that the assignment will remain open and the Editor will proceed directly to the *Notify Author* page.



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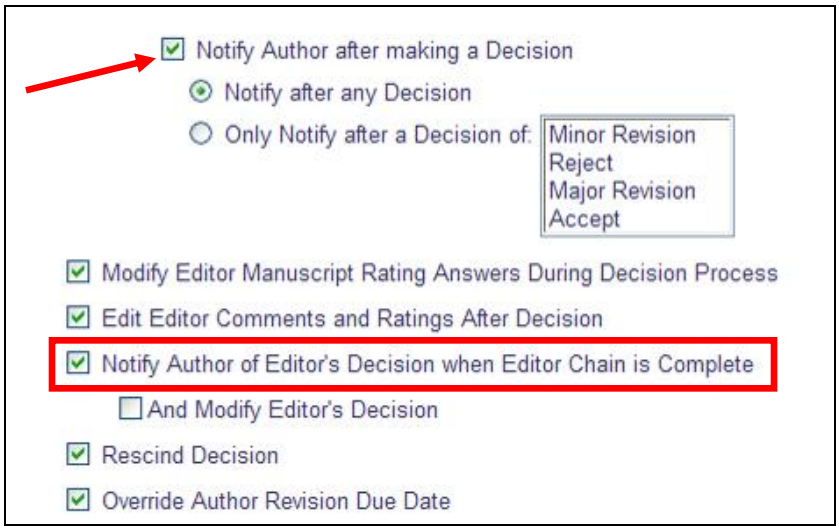
TO CONFIGURE:
The 'Notify Author of Editor's Decision' permission settings are retained on upgrade to v8.0, and the permission is renamed 'Notify Author of Editor's Decision when Editor Chain is Complete'.

The new 'Notify Author after making a Decision' permission with the 'Notify after any Decision' option is enabled on upgrade for Editor Roles which are configured with BOTH of the v7.3 'Make a Decision' and 'Notify Author of Editor's Decision' permissions. In other words, this new permission is enabled for all Editor Roles which automatically see the *Notify Author* page after submitting a decision in v7.3.

To modify Editor Role permissions, use RoleManager, select the desired Editor Role, and make changes to the new permissions.



NOTE: It is recommended that:

- Publications consider removing the 'Notify Author of Editor's Decision when Editor Chain is Complete' from Editor Roles that end up with both permissions enabled after upgrade.
- Publications consider whether lower-level Editors should be restricted to notifications on a limited set of decisions, such as Revise decisions (described below).
- At least one Editor Role be configured with the 'Notify Author of Editor's Decision when Editor Chain is Complete' permission.

Notification Can Be Limited to Specific Decisions

In EM v7.3, an Editor with both the 'Submit Decision' and 'Notify Author…' permissions enabled would be presented with the *Notify Author* page after submitting any decision. New in v8.0, the new 'Notify Author after making a Decision' permission has

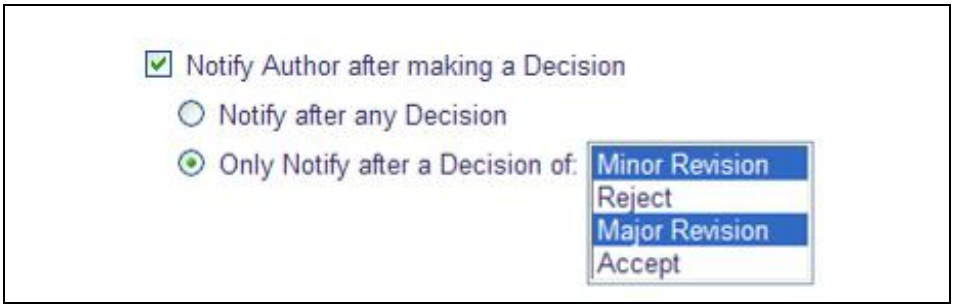
two sub-options, allowing Publications to limit the Decisions on which an Editor may notify the Author.

For example, publications may configure a Junior Editor role with permission to notify the Author immediately if they make a 'Revise' decision, but a decision of 'Accept' or 'Reject' must be moved up the decision chain to their assigning Editor. In v7.3, the Junior Editor would have to remember to manually cancel the *Notify Author* page on 'Accept' or 'Reject' decisions to get the same effect.

NOTE: An Editor who sees the *Notify Author* page as a result of making a decision may now always modify that decision, but they are restricted to the same set of decisions on which they were originally allowed to notify.

TO CONFIGURE:
The 'Notify Author after making a Decision' permission with the 'Notify after any Decision' option is enabled on upgrade for Editor roles which are configured with both of the v7.3 'Make a Decision' and 'Notify Author of Editor's decision' permissions.

To restrict an Editor Role's Notification permissions, use RoleManager and Edit the desired role. Select the 'Only Notify after a Decision of:' option. Holding down CTRL (Windows) or CMD (Mac), select all of the decisions where you want the *Notify Author* page to appear after the Editor submits that decision.



Changes to the 'Notify Author' Page

EM v8.0 introduces enhanced Editor permissions for Notifying Authors of Decisions. The *Notify Author* page has been modified to support the new Decision/Notify Author workflow, where an Editor assignment is not closed until action is taken on the *Notify Author* page.

When an Editor has permission to Notify the Author after making a Decision, the Editor is brought to the *Notify Author* page after clicking 'Proceed' on the *Draft Decision* page. After an Editor proceeds to the *Notify Author* page after making a decision, s/he can now use the 'Cancel' button on that page to return to the initial *Submit Editor's Decision and Comments* page to modify their original comments. In v7.3, this button would abandon the notification as the assignment was already closed, resulting in the end of the Editor's involvement with this revision.

The 'Save and Send Later' button is also enhanced in v8.0. If the Editor uses this button after making a decision, the submission will remain in their 'All Submissions with Required Reviews Complete' folder. Clicking the Submit Editor's Decision and Comments action link for that submission will now return the Editor to the *Notify Author* page with the saved letter loaded for editing. The submission remains in this folder until the letter is sent or the decision is submitted without notifying the Author.

NOTE: When 'Rescind Decision' has been used on a submission, the submission will remain in the 'Submissions with Rescinded Decision' folder when the 'Save and Send Later' button is used, and again the 'Submit Editor's Decision and Comments' action link should be used to access the 'Notify Author' page. The submission will again remain in this folder until the letter is sent, or the decision is submitted without notifying the Author.

There may be times where a lower-level Editor wishes to pass the submission back up the decision chain, for example, to get a second opinion from a senior Editor. A new 'Submit Decision without Notifying Author' button is provided on the *Notify Author* page. This option allows the Editor to explicitly save the decision and cancel the Author notification, completing their assignment and moving the submission up the chain.

NOTE: The Editor must either notify the Author or use the 'Submit Decision without Notifying Author' button from this page, or their assignment will remain open.

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NOTE: In the event the final Editor in the chain has made changes to the Author letter but wishes to have the Editorial Office send the notification, the Editor must click the 'Save' button before the 'Submit Decision without Notifying Author' button. See below for more information on saving letter changes.

Editors with 'Notify Author of Editor's Decision when Editor Chain is Complete' permission may access the *Notify Author* page from the Notify Author action link in the "All Submissions with Editor's Decision" folder. NOTE: The Notify Author action link displays only after all Editor assignments are closed.

When the Editor has accessed this page via the Notify Author action link, it is because all Editor Assignments are closed (the Editor Chain is Complete). In this case, the current Editor is not submitting a decision. Therefore, the "Submit Decision without Notifying Author" button is not available for use.

Editor has accessed the Notify Author page via the 'Notify Author' Action Link:

In EM v7.3, the Modify Decision drop-down appears on the *Notify Author* page only if the Editor has the 'And Modify Editor's Decision' sub-permission under the 'Notify Author of Editor's Decision' permission enabled. This behavior is modified in v8.0 for the two different types of Author notification:

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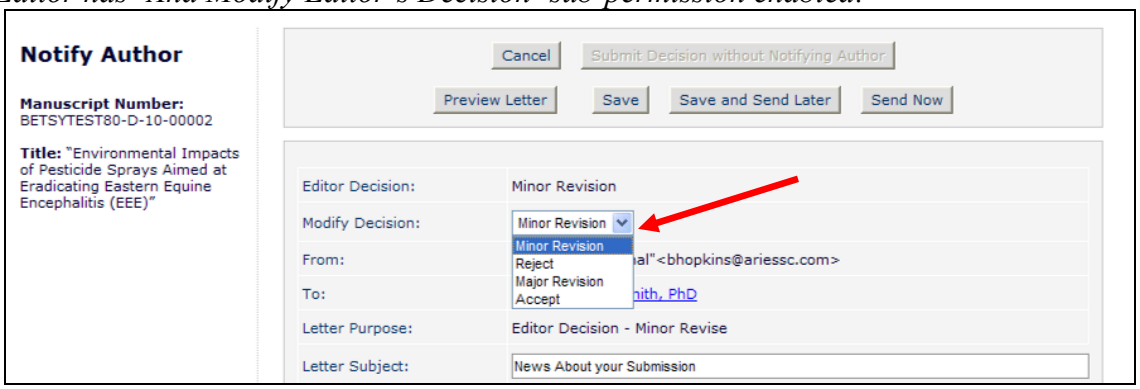
1. After an Editor with the 'Notify Author after making a Decision' permission submits a decision, the 'Modify Decision' drop-down will always appear, so Editors can always modify their own decision at this stage. However, the list of decisions the Editor can select here is limited to those decisions that the Editor can notify on, i.e.:
   a. If the Editor is configured with the 'Notify after any Decision' option set, then all decision terms appear in the drop-down.
   b. If the Editor is configured with the 'Only Notify after a Decision of:' option set, then only the selected decision terms appear in the drop-down.
2. After an Editor with the 'Notify Author…when Editor Chain is Complete' permission clicks on a Notify Author link, then per existing functionality, the drop-down appears only when the Editor's Role is also configured with the 'And Modify Editor's Decision' sub-permissions. In this case, all available decision terms are available for selection.

Editor has 'And Modify Editor's Decision' sub-permission enabled:



TO CONFIGURE:
The 'Notify Author of Editor's Decision' permission settings are retained on upgrade to v8.0, and the permission is renamed 'Notify Author of Editor's Decision when Editor Chain is Complete'. To take advantage of the enhanced permissions (discussed above), go to RoleManager and decide which Editor roles should be allowed to Notify Authors of decisions and whether they should be able to notify on submitting a Decision (or a subset of decisions), or only after the Editor Chain is complete.

Improvements in Saving Author Notification letters

In EM v7.3, the Notify Author page will only load only a decision letter saved by the current user. The 'Save and Continue Editing' and 'Save and Send Later' buttons on the *Notify Author* page are only useful to the Editor at the top of the decision chain, as accessing a saved letter relies on the Notify Author action link being available. This only happens when all Editor Assignments are closed for the current revision. In addition, only the Editor who originally saves the letter can see that saved letter when using the

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Notify Author link. Any other Editor accessing the *Notify Author* page has a new letter generated.

EM v8.0 changes this functionality in several ways:

1. When an Editor goes to the *Notify Author* page after submitting a Decision (by clicking the 'Proceed' button), their Assignment remains open as described in the 'Submit Decision and Notify Author Enhancements' section of these Release Notes. If they use the 'Save and Send Later' button on the *Notify Author* page, they can now return to the saved letter by clicking the Submit Editor's Decision and Comments action link. Clicking this link brings the Editor directly to the Notify Author page with the previously saved letter loaded for editing.
2. If the Editor at the 'top' of the decision chain (for example, the Editor-in-Chief) saves their decision letter and wishes to close their assignment without notifying the Author (so that the Editorial Office may notify the Author, for example), they can use the new 'Submit Decision without Notifying Author' button to complete their assignment. At that point, all Editor Assignments have been closed and the decision chain is complete, and any Editor with the 'Notify Author of Editor's Decision when Editor Chain is Complete' permission enabled will see the Notify Author action link. When an Editor with his permission clicks this link, the *Notify Author* page loads and will display the letter saved by the top Editor in the chain.
3. If the Editor Roles are configured with Skip If/Skip If Not settings in such a way that when a lower-level Editor submits a decision, and all Editors above them in the chain are subsequently skipped, then this results in all Editor Assignments being closed. The Notify Author link will appear for all Editors with 'Notify Author of Editor's Decision when Editor Chain is Complete' permission enabled. In this case, if the lower-level Editor saved a letter before submitting their decision (by clicking the 'Save' button followed by 'Submit Decision without Notifying Author'), that letter will be loaded when the Notify Author link is used.

As an example, if the Editor-in-Chief is expected to write the Author Notification letter, but the Editorial Office is expected to check and dispatch the letter, then the Editor-in-Chief should:

1. Edit the Author notification letter
2. Click the 'Save' button
3. Click the 'Submit Decision without Notifying Author' button

NOTE: The 'Save…' buttons cannot be used to pass an edited letter up the decision chain from a lower-level Editor to the Editor who assigned them. When the lower-level Editor saves their letter, it is linked to their assignment alone; when the higher-level Editor then goes to submit their decision, the system only looks for a saved decision letter linked to that higher-level Editor's own assignment. The previously saved letter is linked to the previous, lower-level Editor's assignment and is therefore not loaded.

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Editors should continue to use the 'Comments to Editor' and 'Comments to Author' fields to pass comments up the chain for inclusion in a final decision letter written by a higher-level Editor. Only the top-level Editor can use the process described above to set up an edited Decision Letter for someone else (such as the Editorial Office) to send via the Notify Author link.

TO CONFIGURE:
No configuration is required. All Editors can use the 'Save…' buttons on the *Notify Author* page, and these changes affect all cases.

Examples

The combination of the new permissions and save behavior allow for finer control of notification based on decision term.

To demonstrate the changes made to the Editor Decision and Notify Author process, assume a workflow in which the Editorial Office handles incoming submissions and assigns Editor A (Editor-in-Chief) to a submission. Editor A subsequently assigns Editor B (Associate Editor). Here are some examples of how to configure different ways in which responsibility for notifying the Author might be distributed amongst these Editors:

Associate Editor (AE) Notifies of Revise decisions, Editor-in-Chief (EiC) Ratifies and Notifies on all others:

- Configure the Associate Editor Role with the 'Notify Author after Making a Decision' permission, with the 'Only Notify after a Decision of' option set. Select all 'Revise' decisions under this.
- Configure the Editor-in-Chief Role with the 'Notify Author after Making a Decision' permission, with the 'Notify after any Decision' option set.
- Configure the Editorial Office (EO) Role (and optionally the EiC Role) with the 'Notify Author of Editor's Decision when Editor Chain is Complete' permission, to pick up any submissions where the EiC decides to Submit Decision without Notifying Author.

In this case:

- If the AE submits a 'Revise' decision they proceed to the *Notify Author* page – they are allowed to modify their decision, but only to one of the other 'Revise' decisions.
- If the AE submits an 'Accept' decision, they do not get the option to proceed to the *Notify Author* page, and can only submit their decision. This then passes up to the EiC.
- Whatever decision the EiC makes, they will proceed to the *Notify Author* page. If for any reason the EiC decides to Submit without Notifying the Author, the

submission moves to the 'All Submissions with Editors Decision' folder, displaying a Notify Author action link to the EO, who can notify at a later date. If the EiC saved their letter before submitting the decision, the EO will see that saved letter when notifying the Author.

Editorial Office handles all Notifications:

- Configure the Associate Editor Role with no Notify Author permissions.
- Configure the Editor-in-Chief Role with no Notify Author permissions.
- Configure the Editorial Office Role with the 'Notify Author of Editor's Decision when Editor Chain is Complete' permission.

Whatever decision the AE selects, they are only allowed to submit the decision. The submission passes up to the EiC, where the same applies to their decision. When the EiC submits their decision, the submission moves to the 'All Submissions with Editors Decision' folder and the EO can use the Notify Author link. There will be no saved letter to be loaded, as the EiC did not see a *Notify Author* page and so could not save a letter.

Editorial Office handles Revise and Reject Notifications directly after the relevant Editor (Associate Editor or Editor-in-Chief) makes the decision; Editor-in-Chief ratifies Reject and Accept decisions from the Associate Editors, and customizes Acceptance letters only before sending to the EO to check and dispatch:

- Configure the Associate Editor Role with no Notify Author permissions.
- Configure the Editor-in-Chief Role with 'Notify Author after Making a Decision' permission, with the 'Only Notify after a Decision of' option set and with only 'Accept' decisions selected.
- Also configure the Editor-in-Chief Role with the 'Skip If' option set, with all 'Revise' decisions selected.
- Configure the Editorial Office Role with the 'Notify Author of Editor's Decision when Editor Chain is Complete' permission.

Whatever decision the AE selects, they are only allowed to submit their decision without notification – but what happens next depends on the decision selected:

1. If the AE chooses a 'Revise' decision, then the 'Skip If' setting applies when the submission passes up to the EiC. The EiC is 'skipped', and their assignment is closed automatically. This moves the submission to the 'All Assignments with Editor's Decision' folder and activates the Notify Author action link, and the EO can now notify the Author of the AE's Revise decision using the default letter template.

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2. If the AE chooses a 'Reject' decision, the submission passes up to the EiC, but the 'Skip If' settings do not trigger a skip, so the EiC has to submit their own decision. If the EiC ratifies the AEs decision and submits their own 'Reject' decision, on submitting the decision the *Notify Author* page does not appear; instead the submission moves to the 'All Assignments with Editor's Decision' folder and the Notify Author action link appears. The EO can now notify the Author of the Editor-in-Chief's 'Reject' decision, using the default letter template.
3. If the AE chooses an 'Accept' decision, the submission passes up to the EiC, who is not skipped. If the EiC submits the same 'Accept' decision, then the *Notify Author* page appears for the EiC. To send an edited decision letter to the EO, the EiC makes their edits, clicks the 'Save' button and then the 'Submit Decision without Notifying Author' button. The submission moves to the 'All Assignments with Editor's Decision' folder and the Notify Author action link appears. The EO can now notify the Author, with the letter saved by the EiC automatically loaded into the *Notify Author* page.

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Enterprise Analytics Reporting Feature Overview

New in v8.0, a new reporting tool is integrated into the EM/PM/CM system called Enterprise Analytics Reporting. Enterprise Analytics Reporting is being implemented using a new generation of web-native reporting technology called Izenda (www.izenda.com). For publications wishing to create custom reports, Enterprise Analytics Reporting will diminish the need to manipulate extracted data with external tools such as Microsoft Excel, and supports the generation of graphic reports.

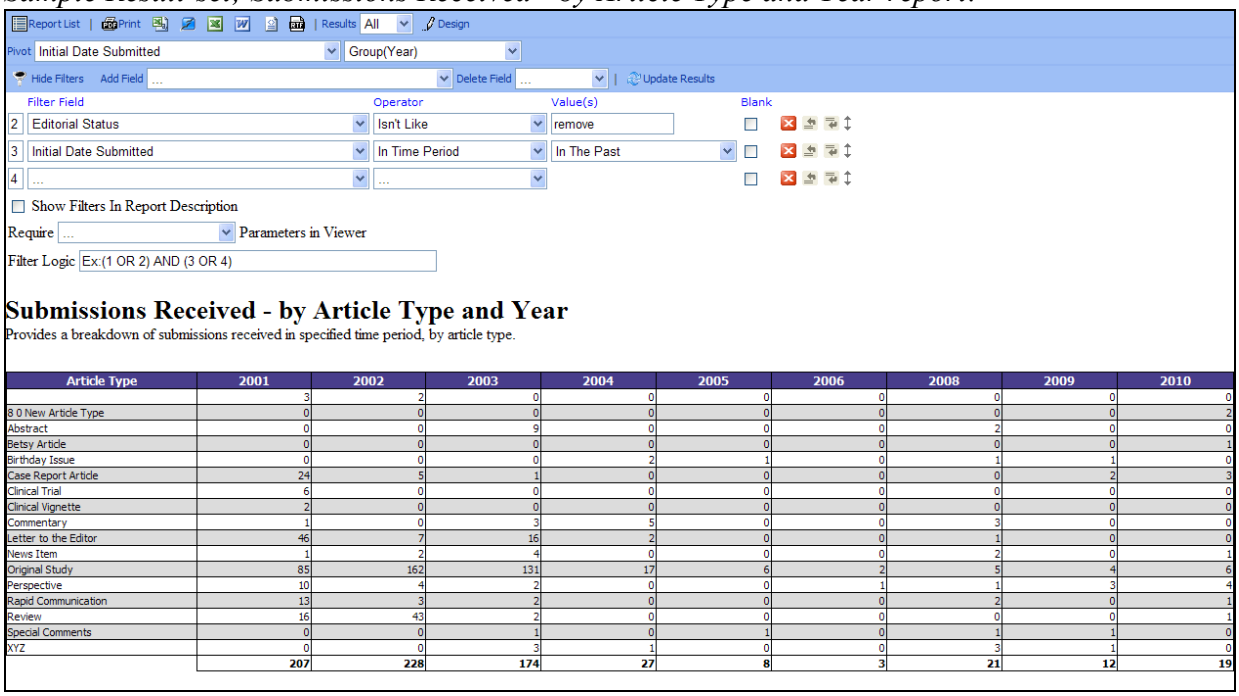
The Enterprise Analytics Reporting main menu, accessed from the 'Reports' menu, provides users with a set of Standard Reports, reports saved by the Editor, as well as a link to create a new report.

NOTE: At upgrade, the only reports on the menu will be the Standard Reports. Additional 'My Reports' and 'Shared Reports' sections appear after an Editor saves their own reports, or after another Editor saves a report as a Shared Report.

Enterprise Analytics Reporting Main Menu – list subject to change

Clicking a report name runs the report and brings up the results page.

Sample Result-set; Submissions Received - by Article Type and Year report:



Submissions Received - by Article Type and Year

Provides a breakdown of submissions received in specified time period, by article type.

Article Type	2001	2002	2003	2004	2005	2006	2008	2009	2010
	3	2	0	0	0	0	0	0	0
8 0 New Article Type	0	0	0	0	0	0	0	0	2
Abstract	0	0	9	0	0	0	2	0	0
Betsy Article	0	0	0	0	0	0	0	0	1
Birthday Issue	0	0	0	2	1	0	1	1	0
Case Report Article	24	5	1	0	0	0	0	2	3
Clinical Trial	6	0	0	0	0	0	0	0	0
Clinical Vignette	2	0	0	0	0	0	0	0	0
Commentary	1	0	3	5	0	0	3	0	0
Letter to the Editor	46	7	16	2	0	0	1	0	0
News Item	1	2	4	0	0	0	2	0	1
Original Study	85	162	131	17	6	2	5	4	6
Perspective	10	4	2	0	0	1	1	3	4
Rapid Communication	13	3	2	0	0	0	2	0	1
Review	16	43	2	0	0	0	0	0	1
Special Comments	0	0	1	0	1	0	1	1	0
XYZ	0	0	3	1	0	0	3	1	0
	207	**228**	**174**	**27**	**8**	**3**	**21**	**12**	**19**

Users will be able to create their own reports, which are stored in a 'My Reports' section; these can also be shared with other Editors, in which case they will appear in a 'Shared Reports' section.

For more information about using the new Enterprise Analytics Reporting feature to run reports and create new, customized reports, refer to the **Enterprise Analytics Reporting Release Notes.**

TO CONFIGURE:
Though the Enterprise Analytics Reporting feature is free of charge, the feature must be enabled by Aries' Customer Service group. To have this feature enabled for your publication, please contact your customer service representative.

When enabled, all Editors with the RoleManager permission 'Produce Reports' will see a new link on the Reports menu – Enterprise Analytics Reporting. Clicking this link leads to the Enterprise Analytics Reporting main menu page (shown above).

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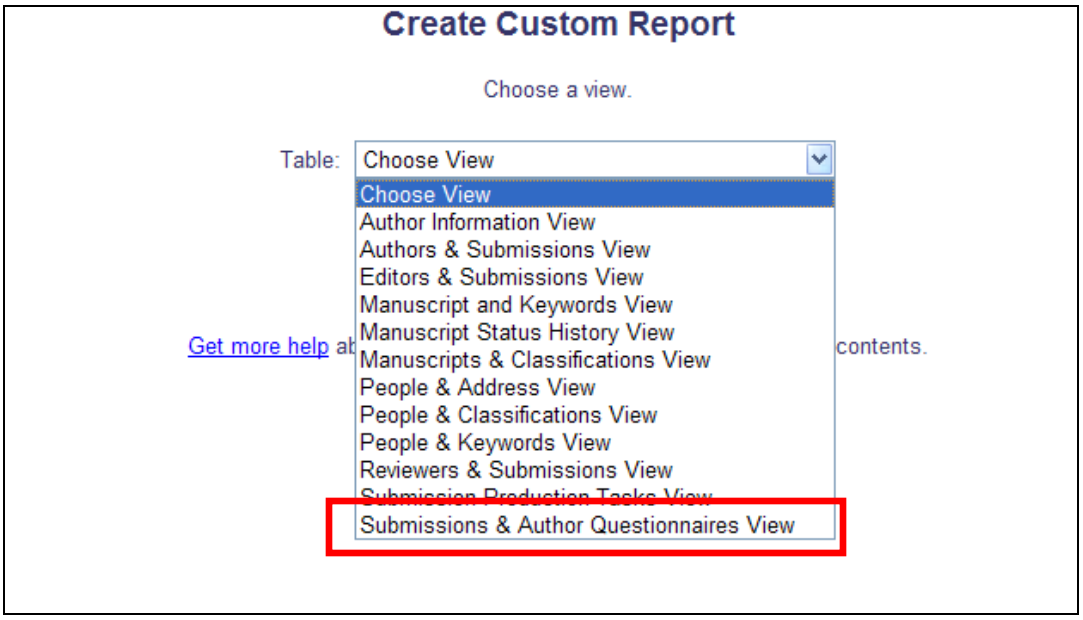
Submission & Author Questionnaires Custom Report View

A new custom report view called 'Submission & Author Questionnaires View' is now added to the list of available views. This view appears at the bottom of the 'Table' drop-down list on the *Create Custom Report* page.



The following output fields are available in this new view:

Article Title [DOCUMENT.DTITLE] Title entered by Author when submitting a new manuscript.
Short Title [DOCUMENT.SHORT_TITLE] Short Title entered by Author when submitting a new manuscript.
Article Type [DOCUMENT.CATEGORY] Article Type is required for submission. Values are defined by the journal, and may include values such as Original Study, Rapid Communication, Case Study.
Initial Date Submitted [DOCUMENT.RECEIVED] The date the Author approved his initial submission of the manuscript, and it was received by the journal office. This is the date that is used to calculate the elapsed time to decision for a submission. **Hints:** The Initial Date Submitted may be overwritten if the Editor edits the submission and sends it back to the Author for approval before another Editor is assigned (edited in New Submissions folder) or before any Reviewers have been invited (edited in New Assignments folder). In this case, the original Received Date is overwritten with the date the Author approved the edited submission.
Technical Check Completion Date [REVHIST.TECHNICAL_CHECK_COMPLETE_DATE] Timestamp indicating when an Editor specified the Technical Check for a submission is complete.
Editorial Status [DSTATUS.NAME] Editorial Status Term defined by the journal.

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Editorial Status Date [DOCUMENT.STATUSDATE]
Date the Status changed in the Manuscript Status field. The journal defines the changes in status for each event in ActionManager.
Hints: Note that some events are non-configurable by the journal.

Edit Submission Status Term [EDIT_SUBMISSION_STATUS.EDIT_SUBMISSION_STATUS_NAME]
Edit Submission Status name which is associated with the ID value.

Edit Submission Status Date [DOCUMENT.EDIT_SUBMISSION_STATUS_DATE]
The date the last edit event occurred for the submission.

First Decision Editor First Name
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITOR_FIRST_DECISION_FIRSTNAME]
The first name of the first Editor to make a decision on the submission.

First Decision Editor Last Name
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITOR_FIRST_DECISION_LASTNAME]
The last name of the first Editor to make a decision on the submission.

Final Decision Editor First Name
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITOR_FINAL_DECISION_FIRSTNAME]
The first name of the Editor who made the final decision on the submission
Hints: Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will trigger this field to be set.

Final Decision Editor Last Name
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITOR_FINAL_DECISION_LASTNAME]
The last name of the Editor who made the final decision on the submission
Hints: Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will trigger this field to be set.

Final Disposition Term [DDISPOSI.NAME]
Allowable values for a regular submission: Accept, Reject, Withdrawn. Allowable values for a Proposal: Completed Proposal, Withdrawn Proposal. Allowable values for a conference submission: Accept and Transmit, Accept for Extraction, Reject, Withdrawn. These terms are defined by Aries, and are not configurable by the journal. Only the "Withdraw" option is available for a regular submission until the Author has been notified of the Editor's decision.
Hints: Value is null (blank) if the Final Disposition has not yet been set. To find all submissions Accepted for publication, user can enter criteria Final Disposition Term = 'Accept', or Final Disposition Term BEGINS WITH 'Acc'.

Date Final Disposition Set [DOCUMENT.DDISPOSIDATE]
Date the final disposition was set on the manuscript.

Days to Final Disposition
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.DAYS_TO_FINAL_DISPOSITION]
The elapsed days between the document's initial date of submission and the date the Final Disposition was set.

Manuscript Number [DOCUMENT.PUBDNUMBER]
Manuscript Number is assigned to a submission after it is received by the journal office. If the journal assigns Manuscript Numbers automatically, the system assigns the number when the submission is assigned to an Editor. If the journal assigns Manuscript Numbers manually, the Manuscript Number must be assigned before the submission can be assigned to an Editor. The value is null (blank) until this point (e.g. while Author is submitting his manuscript, while PDF is being built).

Unique Document ID [DOCUMENT.DOCUMENTID]
Unique identifier for each submission in the system. This is the number used in several other tables to specify data related to a particular submission.

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Submission Number [DOCUMENT.SUBNUMBER]
Unique identifier for each submission in the system. Is assigned as soon as the Author enters a title for his submission. This number is used internally for sorting purposes, and is not displayed on EM screens.

Last Update Date [DOCUMENT.LASTUPDATE]
Date of the most recent change to this table. This field is overwritten every time an Author or Editor edits a submission.

Final Decision Date [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.FINALDECISIONDATE]
The date on which the Author was notified of the final decision.
Hints: Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will trigger this field to be set.

Date of Initial Submission Final Decision
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.DATE_OF_FIRST_DECISION]
Date on which the editorial decision regarding the initial submission (Revision 0) was finalized (i.e. the date of the last Editor's decision before the Author is notified).

Initial Submission Final Decision Term
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.FIRST_DECISION_TERM]
The final editorial decision regarding the initial submission (Revision 0) - i.e. the last Editor's decision before the Author is notified.

Final Decision Term [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.FINAL_DECISION_TERM]
The final editorial decision on the submission.
Hints: Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will appear in this field.

Days to Final Decision
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.DAYS_TO_FINAL_DECISION]
The days elapsed between the document's initial date of submission and the date on which the Author was notified of the final decision.
Hints: Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will allow this field to be calculated.

Days with Author(s) [DOCUMENT.AUTHDAYS]
Number of Days the submission was ‘in the hands’ of the Author. This field is currently not populated in this table.

Editorial Days [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITDAYS]
The sum of all the days during which the submission was with an Editor.
Hints: This is calculated by adding the number of days from the 'Days in Status' column of the Status History Table for all statuses assigned to an Editor role family.

Review Days [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.REVUDAYS]
The total number of days that the submission was under review.
Hints: This is calculated by adding the number of days from the 'Days in Status' column of the Status History Table for all statuses assigned to a Reviewer role family.

Target Online Publication Date [DOCUMENT.TARGET_ONLINE_PUB_DATE]
Target Online Publication Date

Submission Target Publication Date [SUBMISSION_PRODUCTION.TARGET_PUB_DATE]
This submission's individual target publication date.

Submission Target Publication Volume [SUBMISSION_PRODUCTION.TARGET_PUB_VOLUME]
This submission's individual target publication volume.

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Submission Target Publication Issue [SUBMISSION_PRODUCTION.TARGET_PUB_ISSUE] This submission's individual target publication issue.
Actual Online Publication Date [DOCUMENT.ACTUAL_ONLINE_PUB_DATE] Actual Online Publication Date
Publication Date [DOCUMENT.PUBDATE] Date the submission is to be published. Updatable on publisher information page and on the Transmittal Form.
Publication Volume Number [DOCUMENT.PUBVOLUME] Journal's Volume Number in which the submission is to be published. Updatable on publisher information page and on the Transmittal Form.
Publication Issue Number [DOCUMENT.PUBISSUE] Journal's Issue Number in which the submission is to be published. Updatable on publisher information page and on the Transmittal Form.
Print Pages of Article [DOCUMENT.SETPAGES] Total number of pages the article occupies in the printed journal. Updatable on publisher information page and on the Transmittal Form.
Publication Start Page [DOCUMENT.START_PAGE] Actual Start Page
Publication End Page [DOCUMENT.END_PAGE] Actual End Page
Page Range [DOCUMENT.PRINTPAGES] Page range the article occupies in the printed journal. Updatable on publisher information page and on the Transmittal Form.
Table of Contents Position [DOCUMENT.TOC] Article's numeric position in the Table of Contents of the printed journal. Updatable on publisher information page and on the Transmittal Form.
Manuscript Geographic Region of Origin [DOCUMENT_VIEW.REGION_NAME] Entered by the Author or Editor as a manuscript submission step. It may be a country or a custom-defined region.
Manuscript Notes [DOCUMENT.DNOTE] The Note about the manuscript displayed or edited in the Manuscript Details.
Technical Notes [DOCUMENT.TECHNOTES] Technical Notes entered on the Technical Check/Information page.
Conference Name [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_NAME] The name of the conference for which this paper was submitted
Conference Presentation Type [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_PRESENTATION_TYPE] The type of conference presentation associated with this submission
Conference Presentation Date [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_PRESENTATION_DATE] The date of the Conference Presentation associated with this submission
Conference Session [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_SESSION] The conference session with which this submission is associated

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Conference Presentation Sequence **[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_PRESENTATION_SEQUENCE]** The sequence of the conference presentation associated with this submission
Conference Submission Book Title **[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_SUBMISSION_BOOK_TITLE]** The title of the book in which this conference submission will be included
Production Status Text [SUBMISSION_PRODUCTION.PRODUCTION_STATUS_TEXT] User-defined Production Status History.
Production Notes [DOCUMENT.PRODUCTION_NOTES]
Target Table of Contents Position [SCHEDULE_GROUPS_TOC.TABLE_OF_CONTENTS] Target Table of Contents Position
Target Number of Pages [SUBMISSION_PRODUCTION.TARGET_NUMBER_OF_PAGES] Target Number of Pages
Target Start Page [SCHEDULE_GROUPS_TOC.TARGET_START_PAGE] Target Start Page
Target End Page [SCHEDULE_GROUPS_TOC.TARGET_END_PAGE] Target End Page
Question Order [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.QUESTION_RANK] The display order of the question when asked for this submission.
Question ID [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.QUESTION_ID] ID of the record which defines this Custom Submission Question
Question [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.QUESTION] The actual text of the question as displayed to the user
Question Instructions **[CUSTOM_SUBMISSION_QUESTIONNAIRE_QUESTIONS.QUESTION_INSTRUCTIONS]** Instructions to the author on how to answer the question. Used on the additional information page. **Hints:** May be considered to be part of the question by some publications.
Author Response [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.RESPONSE] The author's response to the custom question
Asked on Original [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.ASKED_ON_ORIGINAL] Identifies whether this question was asked on original submission. Is True/1 if the question appeared on the Additional Information step during initial submission. Is False/0 if not. **Hints:** Use in conjunction with the Asked on Revision to determine when this question was asked. If both fields are true, then the response may have been modified on any revision.
Asked on Revision [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.ASKED_ON_REVISION] Identifies whether this question was asked when the Revision was submitted. Is True/1 if the question appeared on the Additional Information step during revision, is 0/False if not. **Hints:** Once asked on a Revision (R1, R2, R3, etc.), the answer may be modified on any subsequent revision. Only the most recent answer is stored in the database.

When a report is run using this View, the results will display one row for each question asked. NOTE: If a question is asked on both an original submission AND a revision, ONLY the Revision Answer is retained; the original response is overwritten by the revision response. Additionally, if there are multiple revisions of a submission, only the

most recent revision (highest revision number) responses are retained; earlier revision answers are not retained.

As with the other custom report views:

- The report results can be downloaded in a tab-delimited format, suitable for use by Excel or other reporting packages.
- The report can be saved, and will be accessible to the user who saved it.

The view is also available in the list of tables and views on the 'Data Sources' tab of Enterprise Analytics Reporting.

TO CONFIGURE:
No configuration is necessary. The new report view will be automatically displayed on the 'Create Custom Report' page for all users. The new report view is also automatically displayed for customers with Enterprise Analytics Reporting enabled for their site.

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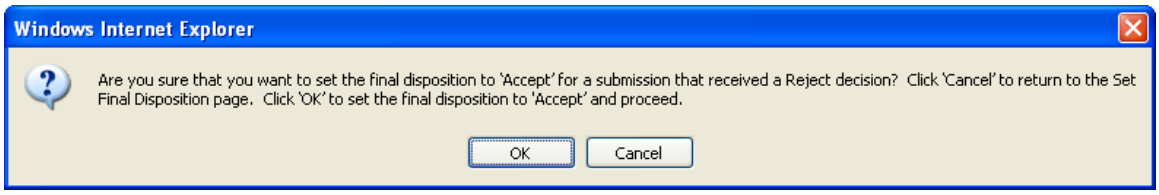
New Validations for Setting Final Disposition

Currently in EM, it is possible for a user to set the final disposition to 'Accept' on a paper that has actually been rejected. If this occurs, submissions may be transmitted to production in error. It is also possible for a user to set the final disposition to 'Reject' on a paper that has actually been accepted for publication, in which case any configured automated transmittal process will not take place.

New in EM v8.0, there is enhanced intelligence on the *Set Final Disposition* page, ensuring that the final disposition selected by the user matches the final decision that was made on the submission, and warns the user if it does not. NOTE: The user may choose to proceed, as they may have a valid reason to change the accepted Final Disposition.

New validation logic is added to the *Set Final Disposition* page when the user selects the 'Accept' or 'Reject' final disposition term. When the user clicks the 'Proceed' button on the *Set Final Disposition* page, the system checks the Decision family for the submission to determine if the selected Final Disposition term matches the Final Decision family.

For example, when the Final Disposition term 'Accept' is selected, EM checks the Decision term to see if it is in the 'Accept' decision family. If the term does not match the decision family (is in the 'Reject' family), the user will be presented with a warning message that the two do not match:



The user may then choose to continue (OK) or select a different Final Disposition (Cancel).

NOTE: This does not affect the Final Disposition of 'Withdrawn' – this may still be selected after a decision in either of the 'Accept' or 'Reject' decision families.

TO CONFIGURE:
No configuration necessary. This feature is enabled for all sites on upgrade.

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NLM 3.0 DTD Now Available

The National Library of Medicine (NLM) has released version 3.0 of its archive/interchange DTD. To support this new NLM release, a new transmittal method, 'Single Destination Transmittal - NLM 3.0', has been created in EM/PM v8.0.

This transmittal method is configured by your Account Coordinator. The Account Coordinator will also configure the publication's requested destination FTP server and e-mail address (for error notification).

TO CONFIGURE:
Contact your Account Coordinator for assistance in configuring your publication to use the NLM 3.0 Transmittal Method.

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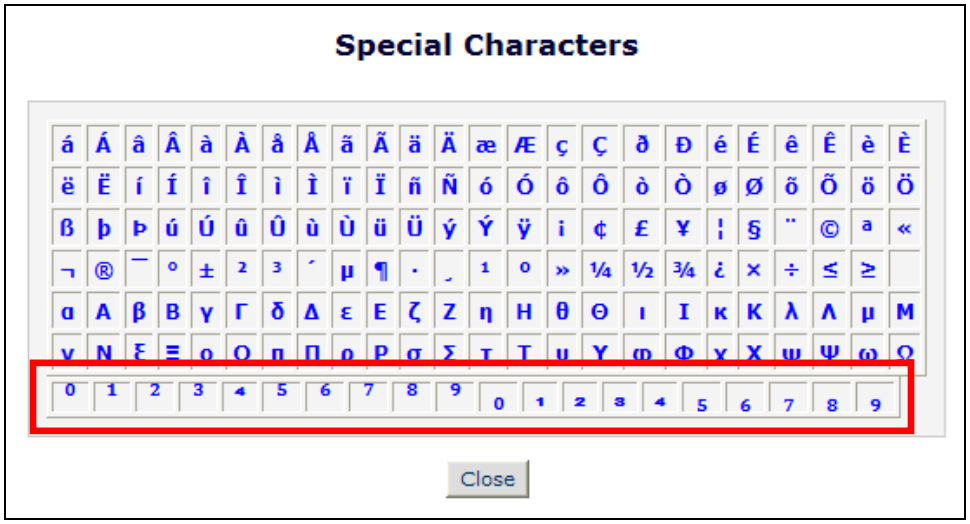
Addition of Special Characters

New in EM/PM v8.0, an additional set of special characters has been added to bottom of the Special Character Palette. The new set contains both superscript and subscript variations for the numerals 0-9.

The Special Character Palette, accessed via the Insert Special Character link, now contains a row at the bottom of the pop-up, displaying the superscript numerals 0-9 and subscript numerals 0-9.



Clicking any of these new characters inserts the character into the text field in which the user is working.

TO CONFIGURE:
No configuration required. These new characters are added to the Special Character Palette on upgrade.

PRODUCTION TRACKING ENHANCEMENTS

Use National Holidays in Due Date Calculations

In EM/PM v7.3, users may enter "Unavailable Dates", dates on which they will not be available to perform work for a publication. When submission or schedule group tasks are assigned to these users, the assignor is presented with the user's Unavailable information. The assignor may then decide if they wish to adjust the user's due date or change the assignee based on this information.

New in PM v8.0, publications may configure a set of National Holidays that are then considered when the system calculates due dates for Production Tasks. Administrators can create 'National Holidays', configuring these on a country-by-country basis within PolicyManager.

- When choosing a person to receive a Production Task Assignment (Submission or Schedule Group), the system includes the National Holidays for the selected person's current Country in the existing check for Unavailable dates. This means National Holidays will trigger the display of Unavailable information, and will be displayed alongside the recipient's own Unavailable dates where appropriate.
- Administrators can choose to automatically allow extra time for the National Holidays linked to the selected assignee in due date calculation for Production Task assignments only.
    - Both Submission and Schedule Group Task assignments are affected.
    - If so configured, the 'Due Date' calculation is enhanced to take National Holidays for the current Country of the selected assignee into consideration when factoring in 'Days after Assignment Date' for Production Task Assignments, and may be pushed back by National Holidays falling within scope of the assignment.
    - No other component of the Due Date calculation – or Must Start/Must End By Date calculation – is affected; only tasks configured with 'Number of Days after Assignment' option are affected.
    - Removing a National Holiday will not affect the existing due date of any currently assigned Production Tasks.

Production Tasks may be configured to calculate due dates based on a number of settings. One of these settings, 'Days after Assignment Date' setting, calculates forward from the current date.

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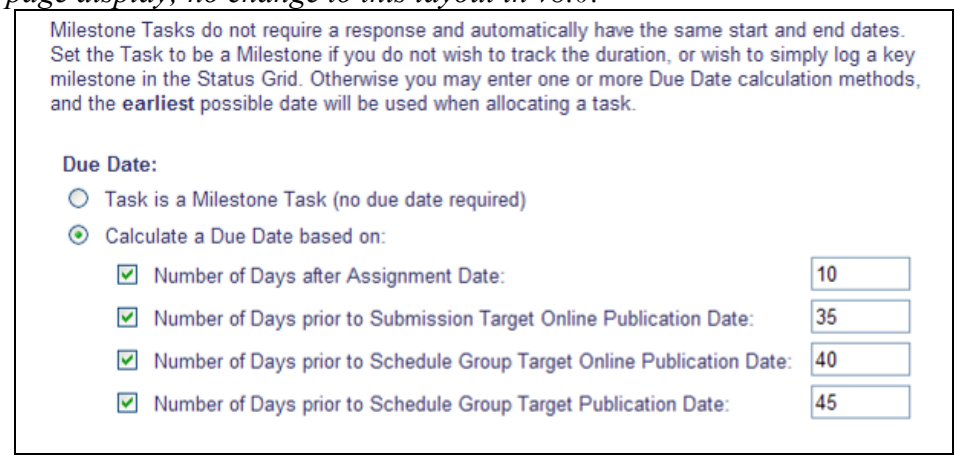
Partial page display; no change to this layout in v8.0:



When configured for a task, the 'Days after Assignment Date' calculates the baseline date that will be applied if no other due dates are configured. New in v8.0, if a publication chooses to have National Holidays considered when assigning tasks, then this potential due date is deferred a day for each day of the assignee's National Holidays that overlaps with the period from the current date to the potential due date. A final check and adjustment is then carried out to ensure that this derived date does not fall on a National Holiday. If it does, then the due date is moved to the earliest possible working day.

NOTE: Per current functionality, other potential due dates are calculated from the other configured options (the 'Days prior to…' options), and those may bring the actual Due Date used forward again, to meet the associated target.

Because National Holidays are associated with the Country linked to an assignee, the system cannot calculate a Due Date until the assignee has been selected if National Holidays are to apply. New in v8.0, when assigning a Production Task, the Due Date will be initially left blank on the Assign Task page under the following conditions:

- The publication IS configured with the new 'Allow extra time for National Holidays in Production Task calculations' setting; AND
- The Task Type is configured to use the 'Days After Assignment' due date option; AND
- There are one or more National Holidays defined for the publication; AND
- The system has NOT automatically selected a person to assign the task to
    - If there is only one possible recipient for the selected task, then per existing functionality that recipient is chosen and cannot be changed.

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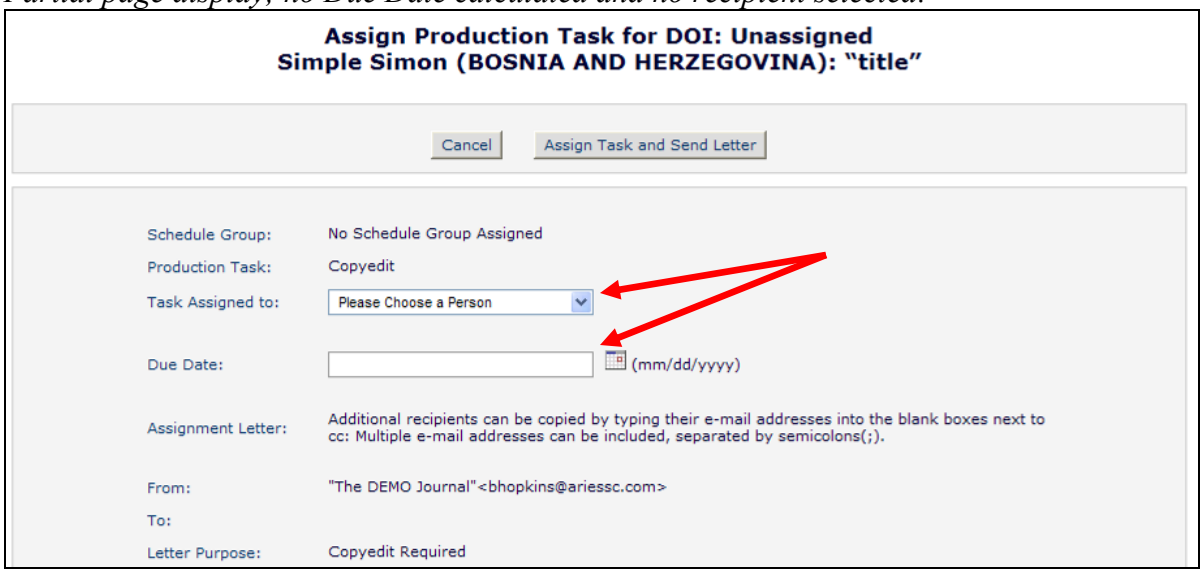
Partial page display; no Due Date calculated and no recipient selected:



Selecting, or changing, the task assignee updates the Due Date field, calculating a new Due Date which takes the new selection's National Holidays into account.

When there are National Holidays associated with the selected assignee, then the 'Unavailable Dates Grid' that displays when the assignee has unavailable dates will display the National Holiday(s) that fall during the assignment period. This happens even if the new 'Allow extra time for National Holidays in Production Task calculations' setting is not set, so that Editors can manually adjust the Due Date if they wish. This grid also displays Unavailable Dates, though they are not taken into consideration by the system when calculating a due date.

The grid is further enhanced in v8.0 with a column that denotes the type as "Personal", or "National". NOTE: This column will only display if the publication has National Holidays configured for at least one country.

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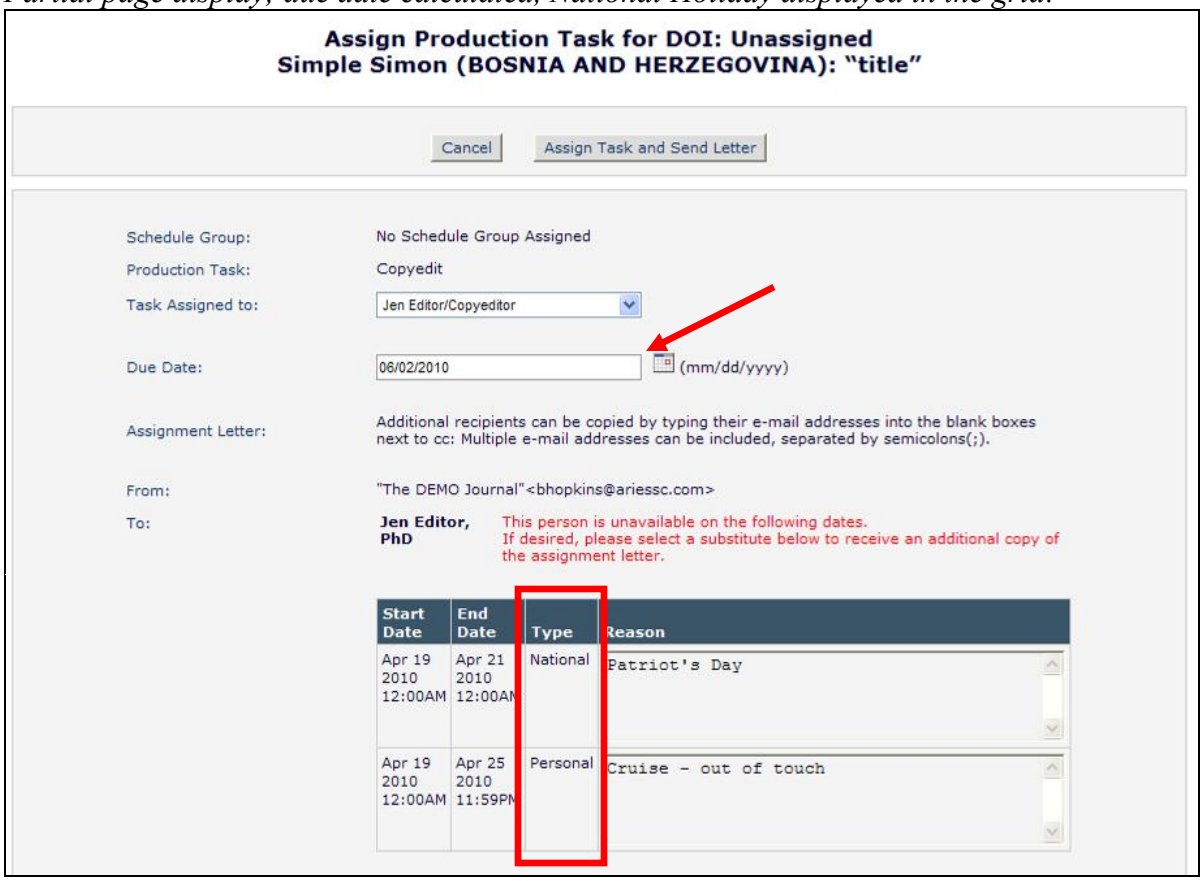
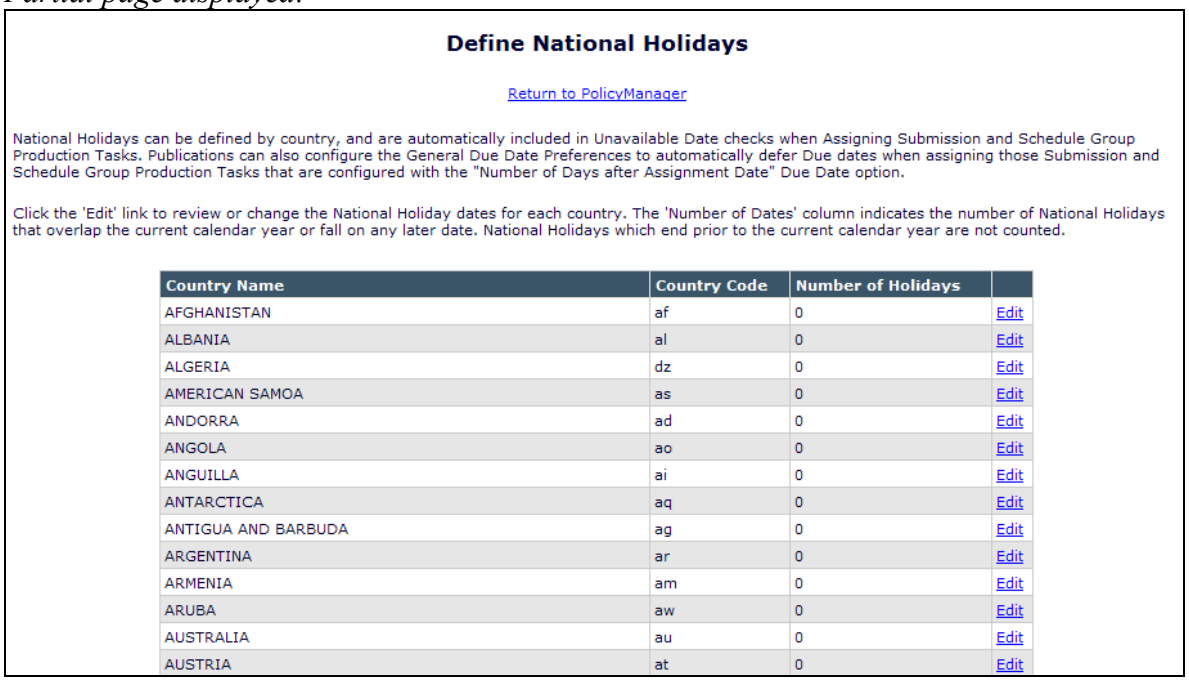
Partial page display; due date calculated, National Holiday displayed in the grid:



TO CONFIGURE:
Publications may define the list of National Holidays by clicking the new 'Define National Holidays' link located in the Preprint Manager section of PolicyManager. The page displays all countries on the publication's selected ISO Country Standard Newsletter.

Partial page displayed:



Define National Holidays

Return to PolicyManager

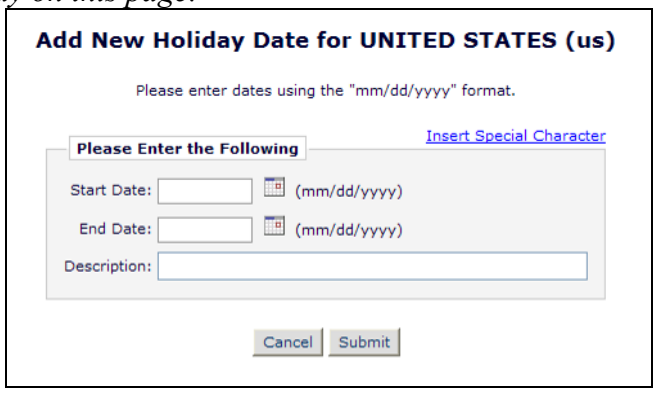
National Holidays can be defined by country, and are automatically included in Unavailable Date checks when Assigning Submission and Schedule Group Production Tasks. Publications can also configure the General Due Date Preferences to automatically defer Due dates when assigning those Submission and Schedule Group Production Tasks that are configured with the "Number of Days after Assignment Date" Due Date option.

Click the 'Edit' link to review or change the National Holiday dates for each country. The 'Number of Dates' column indicates the number of National Holidays that overlap the current calendar year or fall on any later date. National Holidays which end prior to the current calendar year are not counted.

Country Name	Country Code	Number of Holidays	
AFGHANISTAN	af	0	Edit
ALBANIA	al	0	Edit
ALGERIA	dz	0	Edit
AMERICAN SAMOA	as	0	Edit
ANDORRA	ad	0	Edit
ANGOLA	ao	0	Edit
ANGUILLA	ai	0	Edit
ANTARCTICA	aq	0	Edit
ANTIGUA AND BARBUDA	ag	0	Edit
ARGENTINA	ar	0	Edit
ARMENIA	am	0	Edit
ARUBA	aw	0	Edit
AUSTRALIA	au	0	Edit
AUSTRIA	at	0	Edit

The Publication clicks the 'Edit' link next to the desired Country, and is brought to a page where they can enter any National Holidays to be used for due date calculations.

Enter a New Holiday on this page:



Add New Holiday Date for UNITED STATES (us)

Please enter dates using the "mm/dd/yyyy" format.

Insert Special Character

Please Enter the Following

Start Date: (mm/dd/yyyy)

End Date: (mm/dd/yyyy)

Description:

Cancel Submit

Submit the holiday; the list displays similar to Unavailable Dates:

Edit Holiday Date UNITED STATES (us)

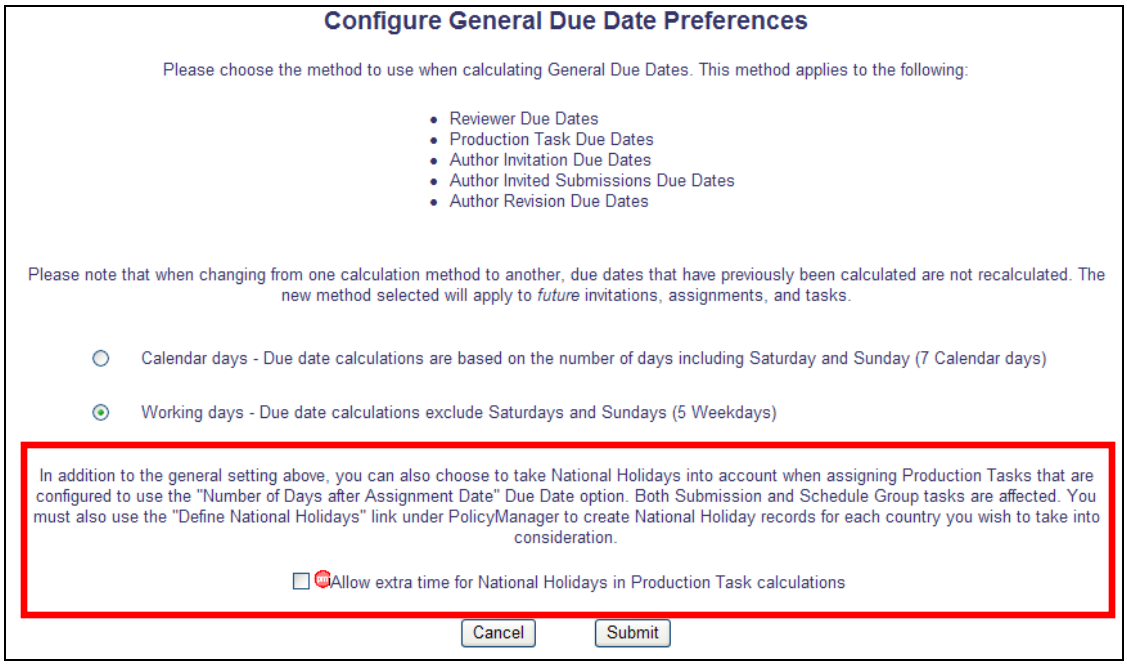
Start Date	End Date	Description	
05-31-2010	05-31-2010	Memorial Day - Federal Holiday	Edit Remove
07-04-2010	07-05-2010	Indepedence Day (date and date recognized) - Federal Holiday	Edit Remove

Add New Holiday Date

Close

NOTE: If an administrator changes the ISO country code newsletter used by the publication, the change updates the country list used by the publication. Changing the newsletter may add new countries or remove countries. Administrators will need to manually add new National Holidays to the new country if desired. If a country's name alone is changed by an update, as long as the country code is unchanged, any existing National Holidays will remain in place for that country.

To use these dates in due date calculations, go to the 'Configure General Due Date Preferences' page in PolicyManager.



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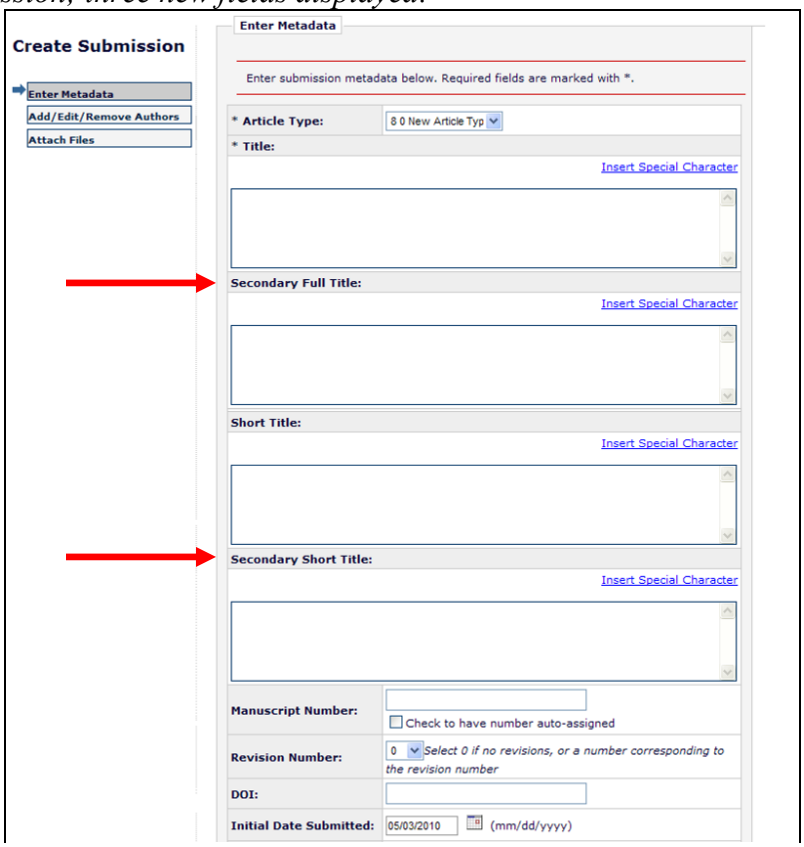
Secondary Submission Fields - Create Submission

Some publications wish to capture key title and abstract information in multiple languages, for example where the publication requires an English title or abstract for online systems but publishes in another language, or where it publishes translated papers in English but includes the title or abstract in their original language.

New in EM/PM v8.0, three new fields are available for use in the Create Submissions interface called 'Secondary Full Title', 'Secondary Short Title', and 'Secondary Abstract'. These new fields will be used to hold the information in a different language than the one entered into the existing system field.

The three new fields are configured to display based on Article Type. When configured to display for an Article Type, each field displays with the corresponding Primary field. In other words, the 'Secondary Full Title' entry box appears under the 'Full Title' entry box, etc.

Create Submission; three new fields displayed:



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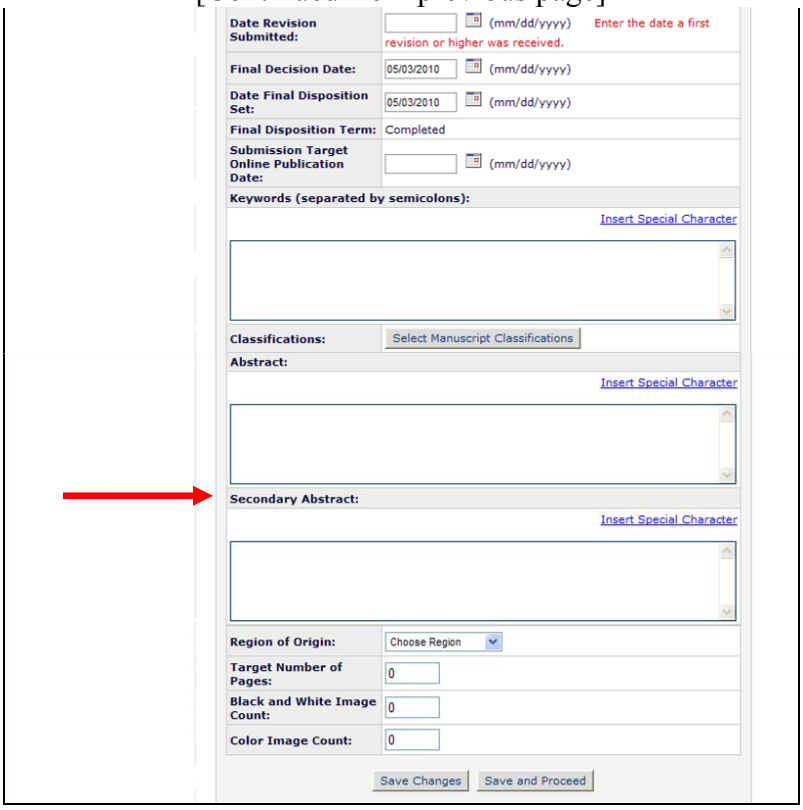
[Continued from previous page]



TO CONFIGURE:
To enable any of these new fields for submissions, go to PolicyManager, *Edit Article Type* page, and click 'Edit' next to the desired Article Type (or create a new Article Type). These new secondary fields are configured as 'Hidden' on upgrade to v8.0, and may be set to either 'Optional' or 'Required' for any Article Type.

NOTE: Field requirements are not enforced on the Create Submission interface except the selection of an Article Type and the Title.

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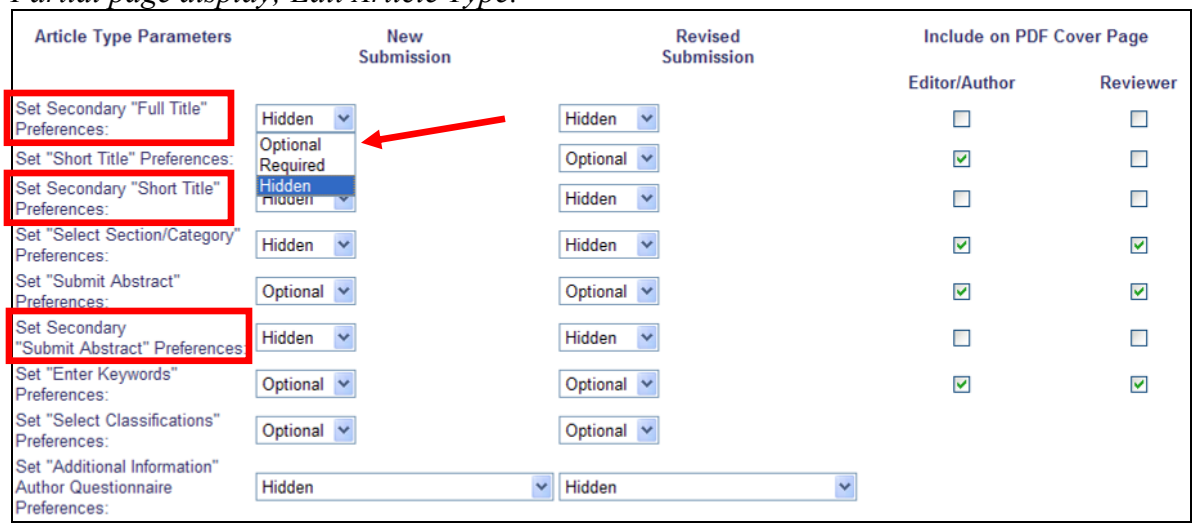
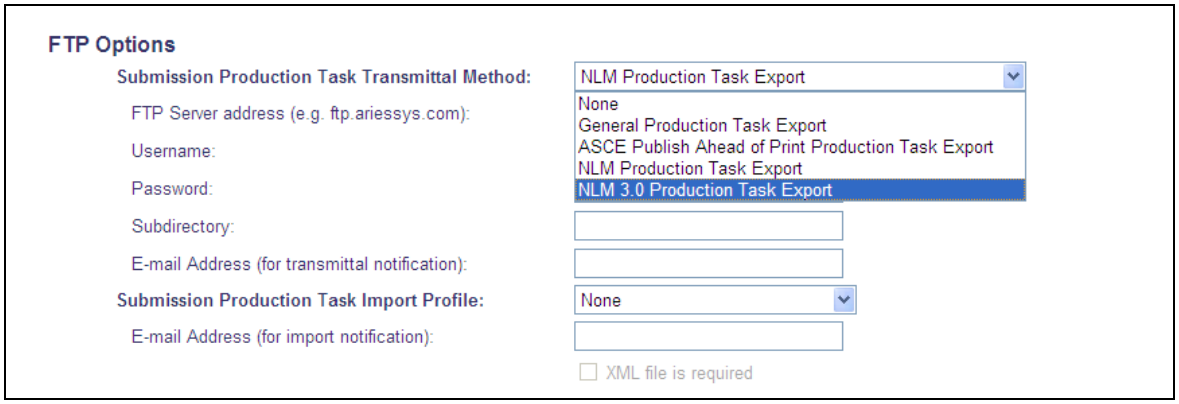
Partial page display; Edit Article Type:



New Submission Production Task Transmittal Method

The National Library of Medicine (NLM) has released version 3.0 of its archive/interchange DTD. To support this new NLM release, a new Submission Production Task Transmittal Method, 'NLM 3.0 Production Task Export', has been created in EM/PM v8.0.

The new 'NLM 3.0 Production Task Export' transmittal method is available on the *Configure Submission Production Tasks* page. System administrators may configure existing Submission Production Tasks to use this transmittal method, or configure new Submission Production Tasks using this method.



TO CONFIGURE:
To configure Submission Production Tasks to use this method, go to PolicyManager, 'Configure Submission Production Tasks', and edit an existing task or add a new task. The new option is located at the bottom of the 'Submission Production Task Transmittal Method' drop-down menu.

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