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Aries Systems Corporation

Editorial Manager
Preprint Manager
Commerce Manager

Release Notification

Editorial Manager/Preprint Manager
8.1 General Release Notification
12/21/2010
Draft – Subject to Change

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## Document Change Log

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/05/2010</td>
<td>Beta Release</td>
<td>Beta version</td>
</tr>
<tr>
<td>11/10/2010</td>
<td>Gamma Release</td>
<td>Include two new sections from beta supplement:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Review Questions and Responses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Custom Report View</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Personal Classification Ranking</td>
</tr>
<tr>
<td>12/21/2010</td>
<td>General Release</td>
<td>Fix image on page 46</td>
</tr>
</tbody>
</table>
Editorial Manager/Preprint Manager 8.1 General Release Notification

GENERAL ENHANCEMENTS.................................................................................................................. 1
  Time Zone Display............................................................................................................................. 1
  Other Author Personal Information Merge Fields............................................................................. 5
  Enhanced Review Form....................................................................................................................... 6
  Review Questions and Responses Custom Report View.................................................................... 27
  Revised File Inventory Layout........................................................................................................... 30
  Support for Unicode Characters in Downloaded Transmittal Form.................................................... 31
  Personal Classification Ranking......................................................................................................... 40

ENTERPRISE ANALYTICS REPORTING ENHANCEMENTS ..............................................................45
  E-Mail and Scheduling Capabilities................................................................................................... 45

COMMERCE MANAGER ENHANCEMENTS.......................................................................................56
  Fees Requiring Action Report........................................................................................................... 56

PRODUCTION TRACKING ENHANCEMENTS ...............................................................................60
  Reassign Submission and Schedule Group Production Tasks............................................................ 60
  Hide Multiple Companion Files....................................................................................................... 64
GENERAL ENHANCEMENTS

Time Zone Display

EM/PM uses US Eastern time as the standard time for date/time storage throughout the system. This means that for every EM/PM user, the calendar rolls over from one calendar day to the next at midnight US Eastern. This does not match the local calendar for many users – for example, if a German Editor was to carry out an action at 1am in the user’s local time on the 1st of January, the system would register this as taking place at 7pm on the 31st of December, resulting in the date appearing to be 1 day off for the Editor.

New in EM/PM v8.1, publications may configure their site to display the user’s own current, local time and date next to the current time and date for the EM Site (US Eastern time). Displaying the two times in this way makes it clearer to the user that the site may be working in a different time zone than the user, and helps explain any possible date discrepancies.

NOTE: The EM Site time is always the US Eastern time zone.

When the new option is enabled, then users will see a new ‘Time Zone Footer’ frame when they are logged into EM/PM. The ‘Time Zone Footer’ contains text detailing the user’s current, local time (on their own system as identified from their browser) and the current time used by the EM site they are accessing (US Eastern time).

1. If the system is not able to determine the user’s local time from their browser, the footer displays only the current Site Time:

   **Site time:** 19:00, 28 February
2. If the system is able to determine the user’s local time, the footer displays both the user’s time and the current Site Time:

**Your Time:** 11:00, 01 March • **Site Time:** 19:00, 28 February

NOTE: The time/date displays in the 24-hour clock format, with only the day and month displayed.

The ‘Site Time’ displays as a link, allowing users to click this link for more information. Clicking the time opens a ‘Time Zone Information’ pop-up window, which displays the Site Time, the User’s Time (when available), and the Time Difference between the two times (when the user’s time is available).

*User’s local time cannot be determined:*
### Site time zone is ahead of user:

<table>
<thead>
<tr>
<th>Time Zone Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please note that the site may be hosted in a different time zone. Events are logged and calculated using the site time zone, so please consider this when viewing dates and times.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Your Time:</th>
<th>Site Time:</th>
<th>Time Difference:</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:21 PM, 20 February 2010</td>
<td>9:13 PM, 20 February 2010</td>
<td>The site time is 4 hours 52 minutes ahead of the local time reported by your browser.</td>
</tr>
</tbody>
</table>

### Site time zone is behind user:

<table>
<thead>
<tr>
<th>Time Zone Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please note that the site may be hosted in a different time zone. Events are logged and calculated using the site time zone, so please consider this when viewing dates and times.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Your Time:</th>
<th>Site Time:</th>
<th>Time Difference:</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:21 AM, 21 February 2010</td>
<td>9:13 PM, 20 February 2010</td>
<td>The site time is 12 hours 09 minutes behind the local time reported by your browser.</td>
</tr>
</tbody>
</table>

NOTE: The time/date display in the pop-up is in the 7:23 PM, 21 February 2010 format (i.e., AM or PM format, full month name, full year, comma separating time and date) rather than the publication configured time display.

NOTE: The Time Difference is not the difference in time zones between the user and the site – it is the difference between the user’s clock and the EM server’s clock time, and therefore may not be a whole number of hours.

TO CONFIGURE:
In PolicyManager, a new ‘Set Time Zone Display Policy’ item is added to the General Policies section, beneath the existing Set Date Format link.
This link opens the *Set Time Zone Display Policy* page. Select/check the ‘Display the Time Zone page footer to users’ box to display the time zone banner to all users when logged into your site.
Other Author Personal Information Merge Fields

EM/PM v7.3 introduced the ability for publications to configure Article Types to require that Other Authors of a submission confirm that they are a contributor, and/or register with the publication in order to confirm their contributions. A letter requesting confirmation or registration/confirmation is sent to these “Other Authors” at the e-mail address provided by the Corresponding Author when the paper was submitted.

New in v8.1, the existing set of personal information merge fields is now available for use in the letter to Other Authors. Publications may now use these merge fields in the Other Author Notification letters configured for the “Notify Other Authors” event. When used in the letter, these fields will pull in the information entered by the Corresponding Author.

The following merge fields may now be used in the letters to Other Authors:

- %TITLE% - inserts the recipient other author’s title
- %FIRST_NAME% - inserts the recipient other author’s first name
- %MIDDLE_NAME% - inserts the recipient other author’s middle name
- %LAST_NAME% - inserts the recipient other author’s last name
- %DEGREE% - inserts the recipient other author’s degree
- %POSITION% - inserts the recipient other -author’s position
- %INSTITUTION% - inserts the recipient other author’s institution
- %DEPARTMENT% - inserts the recipient other author’s department
- %ADDRESS% - inserts the recipient other author’s concatenated address, consisting of INSTITUTE, ADDRESS1, ADDRESS2, ADDRESS3, ADDRESS4, CITY, STATE, ZIPCODE, COUNTRY
- %ADDRESS1% - inserts the recipient other author’s ADDRESS1 field
- %ADDRESS2% - inserts the recipient other author’s ADDRESS2 field
- %ADDRESS3% - inserts the recipient other author’s ADDRESS3 field
- %ADDRESS4% - inserts the recipient other author’s ADDRESS4 field
- %CITY% - inserts the recipient other author’s city
- %STATE% - inserts the recipient other author’s state
- %ZIP_CODE% - inserts the recipient other author’s zip code
- %COUNTRY% - inserts the recipient other author’s country

TO CONFIGURE:
The above merge fields are available for use upon upgrade to v8.1. To include any of these merge fields in the letter, go to PolicyManager, Edit Letters, and locate the letter configured for use with the “Notify Other Authors” event. Add the desired merge fields and save the changes.
Enhanced Review Form

In EM v8.0, the Reviewer Recommendation page contains four main components – the Recommendation Term, the Overall Manuscript Rating, Manuscript Rating Questions and Comments to Author and Editor.

- Both the Overall Manuscript Rating and the Manuscript Rating Questions are optionally included on the form.
- Reviewer feedback is captured mostly via the Comments to Author and Comments to Editor boxes.
- The publication may pre-populate the ‘Comments to Editor’ box with text to assist the Reviewer, currently referred to as the “Review Form”.
- The Manuscript Rating Questions and instructions are configured separately from the Review Form. The administrator then chooses which Review Form and/or Manuscript Rating Questions are applied to each combination of Article Type and Reviewer Role. From that point on, the same Review Form will be used for all revisions of the submission. Manuscript Rating Questions are not generally applicable to revisions and are therefore only used for the original submissions.

New in EM v8.1, the Reviewer Recommendation functionality is enhanced to allow more flexibility in gathering information from Reviewers by adding tools similar to the existing Custom Submission Questions for Authors. Reviewers will continue to experience the same workflow for reviewing a submission, but the review experience will be enhanced by the addition of Custom Review Questions.

To implement the enhanced Reviewer Recommendation Form, Administrators should:

- Create a master list of Review Questions
- Create or Edit a Review Form, selecting Review Questions to be included on each form and the order in which the various sections should be displayed (Custom Review Questions, Manuscript Rating Questions, Comments to Authors and Editors)
- Match the Review Forms to Article Types and Reviewer Roles, for New and Revised submissions

This allows the publication to collect different pieces of information from Reviewers depending on the Reviewer Role and the Article Type of submission, and customize the parameters for the responses (i.e. Reviewer’s answers to the questions):

1. Response Type (e.g. Text, Date, Integer, Decimal, Notes, List, Yes/No, Yes/No/NA, Yes/No/Text option)
   a. A ‘List’ Response Type can be further customized to be a drop-down list box, radio buttons, checkboxes, or a scrollable selector box
b. A ‘Yes/No/Text’ option can be configured to request a subsequent text response when the Reviewer selects either the Yes or No answer, as desired

2. Customized instructions for the Reviewer response
3. Default values and/or default text for Reviewer’s response
4. Maximum field length for responses (i.e. character count)
5. Whether a response is required by the Reviewer
6. Whether a response may be viewed by other Reviewers
Sample of enhanced Reviewer Recommendation page:

Review Instructions

Manuscript Rating

*The subject addressed in this article is worthy of investigation.

*Please rate the novelty of the information (with 1 = previously published and 5 = completely new)

*Are you a spam bot?

*Please rate the quality of the language and writing style (with 1 = unacceptable and 10 = ready to publish as is)

Review Questions

*On what date did you review this manuscript?

What is your primary area of expertise? (Limit 200 Characters)

Please describe any logical fallacies found in this manuscript. (Limit 20000 Characters)

How much would you pay for a reprint of this article in USD?

Please evaluate the number of figures that accompany this manuscript:

- Please select a response
- Figures and text are well-balanced and complementary
- Insufficient to illustrate concepts
- Not all data is represented graphically that should be
- Some illustrations are redundant
- Figures are not needed for this subject matter
- Included figures are irrelevant to the subject matter
List: checkboxes response type

List: dropdown response type

Integer response type

List: scrolling selector response type

Yes/No response type

Yes/No/NA response type

Yes/No/Text response type

Default text

[continued from previous page]

List:
- Paired Classification
- Ontologies
- User Experience Design
- Visual Information Design
- The Semantic Web

What is the scope of the work?

Please select a response.

How old are you? (Limit 3 Characters)

Character Count: 0

What aspects of the paper did you review? (please select one or more)

Citation
- Language
- Logic
- Rationale of Work
- Scientific Techniques

Did this paper make sense?

Yes
No

How much wood would a woodchuck chuck if a woodchuck could chuck wood?

Yes
No

Not Applicable

Given a truck that can combine a variety of different payloads and car types (flat, coil, tanker, box, lumber, etc.), while commuter trains carry an inherently more interesting payload (people) are freight trains really more interesting than commuter trains?

[continued on next page]
Once a Review has been successfully submitted to the editorial office, Editors with access to the View Reviews and Comments page for a submission will be able to view the Reviewer’s responses on the View Individual Reviewer Comments page, or on a new View Review Question Responses page, which displays all Reviewer responses in a score-card layout.

Sample Review Question Responses page:

TO CONFIGURE:
When publications upgrade to version 8.1, all existing Reviewer Forms in version 8.0 will be enhanced with the new configuration. Administrators do not need to change anything in PolicyManager, and the Review Forms will continue to function as implemented in version 8.0.
However, if you want to take advantage of the new features, some adjustments to the configuration are required.

In PolicyManager, the ‘Reviewer and Editor Form Policies’ section has been re-organized to display the order in which items should be configured. The ‘Manuscript Rating Question Configuration’ section allows for the creation or modification of Rating-related questions with a sliding scale response (1-3, 1-5, or 1-10).

NOTE: The Rating Questions are not modified in v8.1; these Rating Questions continue to function as in v8.0.

The ‘Reviewer Recommendation Policies’ section is below that, where the new Custom Review Questions may be configured, and the enhanced Review Forms are configured.

PolicyManager; partial page display:

In PolicyManager, click the Create/Edit Custom Review Questions link in the ‘Reviewer Recommendation Policies’ section. There will be no Review Questions on upgrade, but new Review Questions can be added by clicking either ‘Add’ button.
No questions configured on upgrade:

Create Custom Review Questions

Listed below are the custom questions which may be displayed as part of a Review Form.

A question may be removed unless it has been used. If a question has been used but is now obsolete, it may be inactivated by clicking the Edit link and selecting the Hide checkbox. Hidden questions are displayed at the bottom of the list in gray italic text.

To add a new question, click the Add button.

Add

No Custom Review Questions have been defined.

Add

Create/Edit Review Forms

Match Reviewer Forms to Article Types and Reviewer Roles

Return to PolicyManager
Sample page with questions configured:

Create Custom Review Questions

Listed below are the custom questions which may be displayed as part of a Review Form.

A question may be removed unless it has been used. If a question has been used but is now obsolete, it may be inactivated by clicking the Edit link and selecting the Hide checkbox. Hidden questions are displayed at the bottom of the list in gray italic text.

To add a new question, click the Add button.

<table>
<thead>
<tr>
<th>Question</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>On what date did you review this manuscript?</td>
<td>Edit</td>
</tr>
<tr>
<td>Is the contextual presentation of the study current and relevant?</td>
<td>Edit</td>
</tr>
<tr>
<td>Is the length of the paper appropriate to the scientific contents?</td>
<td>Edit</td>
</tr>
<tr>
<td>How much would you pay for a reprint of this article in USD?</td>
<td>Edit</td>
</tr>
<tr>
<td>What is the scope of the work?</td>
<td>Edit</td>
</tr>
<tr>
<td>What is your primary area of expertise?</td>
<td>Edit</td>
</tr>
<tr>
<td>Does the abstract accurately and comprehensively summarize the paper?</td>
<td>Remove  Edit</td>
</tr>
<tr>
<td>Does the evidence presented justify the conclusions?</td>
<td>Remove  Edit</td>
</tr>
<tr>
<td>Please describe any logical fallacies found in this manuscript.</td>
<td>Edit</td>
</tr>
<tr>
<td>What aspects of the paper did you review?</td>
<td>Edit</td>
</tr>
<tr>
<td>Please evaluate the number of figures that accompany this manuscript.</td>
<td>Remove  Edit</td>
</tr>
<tr>
<td>Please select the fields of study to which this material would be most applicable:</td>
<td>Remove  Edit</td>
</tr>
<tr>
<td>What is the air-speed velocity of an unladen swallow?</td>
<td>Remove  Edit</td>
</tr>
<tr>
<td>Could any portion of the paper be left out without affecting the integrity of the information and conclusions presented?</td>
<td>Remove  Edit</td>
</tr>
<tr>
<td>How old are you?</td>
<td>Edit</td>
</tr>
</tbody>
</table>

On the Create Custom Review Questions page, click the ‘Add’ button to create a new Question in the ‘master list’, or click the Edit link to modify an existing question (there are no questions on upgrade to v8.1). The new Add/Edit Custom Review Question page, modeled on the existing Add/Edit Custom Submission Question page, has the following features:

1. ‘Question’ – Enter the text of the Question for the Reviewer
2. ‘Instructions for Reviewer Response’ – If you enter text here, it is available to the Reviewer by clicking the Instructions hyperlink next to the Question on the Reviewer Recommendation page.
3. ‘Hide’ checkbox – A Question may become outdated over time. Use the ‘Hide’ checkbox to ‘retire’ a Question. The Question must be removed from all Review Forms before it can be hidden. Hidden Questions are not available for selection on the Create/Edit Review Forms page.

4. ‘Response Type’ – This indicates how the Reviewer is expected to respond to the Questions when submitting a recommendation (i.e. select an option from a drop-down list, enter a date, enter text, etc). This drop-down list allows you to choose from one of the following options:

- ‘Text’ (selected by default) – If this Response Type is selected, the Reviewer response can contain any combination of characters and numbers. A character limit of 1-200 may be set on a text field. A default response may be entered as well, such as information to prompt the Reviewer, if desired.

- ‘Date’ – Reviewer response must be entered in an ‘mm/dd/yyyy’ format. The calendar icon feature is displayed to provide a convenient way for the Reviewer to adhere to this format. A default date may be provided, if desired.

- ‘Integer’ – Reviewer response must be a whole number. A default value may be provided, if desired.

- ‘Decimal’ – Reviewer response can contain only numbers and a decimal point.

- ‘Notes’ – Reviewer response may contain any combination of characters and numbers. This is just like ‘Text’, except the Reviewer has a larger area in which to type. A default value may be entered, and a character limit may be set from 1-20,000.

- ‘List’ – Reviewer response requires the Reviewer to select from a list of choices pre-configured by the Administrator. This is described further below.

- ‘Yes/No’ – Reviewer is presented with the drop-down option of ‘Yes’ or ‘No’.

- ‘Yes/No/NA’ – Reviewer is presented with the drop-down option of ‘Yes’, ‘No’, or ‘Not Applicable’.

- ‘Yes/No/Text’ – Reviewer is presented with the drop-down options of ‘Yes’ or ‘No’. Either of these responses may be configured to prompt the Reviewer to provide more information in a Text box. Additional instructions to the Reviewer are entered specifying the follow up information desired. The Reviewer follow-on response may contain any combination of characters and numbers. A character limit may be set from 1-20,000.
Selecting the ‘List’ option from the Response Type drop-down refreshes the page to display a View/Edit Values for List link which leads to the page where the list of possible values from which the Reviewer can choose is defined. There is also a ‘Display List As’ drop-down with four display options to specify how the list of possible values is presented to the Reviewer:

1. ‘Drop-down list (Allows for a null or single value selection)’ – The Reviewer would see a drop-down list of allowable values to choose from. He can select only one value from the drop-down list.
2. ‘Radio Buttons (Allows for a single value selection; requires a default value)’ – The Reviewer would see a set of radio buttons, where he must select one answer.

3. ‘Checkboxes (Allows for multiple value selection; good for 1-5 values)’ – The Reviewer will see a list of selectable checkboxes, where he can select one or more answers. The minimum/maximum number of selections the Reviewer is allowed to make may be specified.

4. ‘Scrolling Selector (Allows for multiple value selection; good for more than 5 values)’ – The Reviewer would see a scrolling selector box, where he can select one or more answers. The minimum/maximum number of selections the Reviewer is allowed to make may be specified.

Clicking the View/Edit Values for List link navigates the Administrator to one of two versions of the Configure Values for List page, depending on whether the List Display option selected on the previous page requires definition of a default value. From these pages the Administrator can customize the options available for Reviewer responses from a list, indicate the order in which the answer choices are displayed, and specify the default value.

For Custom Review Question lists, the standard “Please select a response” selection may be removed from the list by first choosing another answer for the default and saving the change using the “Save Changes” button (this will also save any other changes that have been made). A Remove link will then appear for the “Please select a response” option, allowing that selection to be removed.
Example: no default value required

Example: default value required:
Selecting the ‘Yes/No/Text’ option from the Response Type drop-down refreshes the page to display additional options for the user to define:

- Which value acts as the trigger (Yes or No) – this means that when the Reviewer selects this answer, they will be prompted to provide additional information in a text box
- What additional information is being requested when the answer is the trigger value
- A maximum length of the Reviewer reply

![Response Type Form](image)

NOTE: When the Edit link is selected for an existing Review Question, and that Question has been used on a Review at least once, some aspects of the question may not be changed, including list values, to maintain historical integrity.
When the master list of Questions has been created, including the configuration of the values for List Response Types, the Questions must be associated with Review Forms. To create a new Review Form, or modify an existing one, go to PolicyManager and click the Create/Edit Review Form link in the ‘Reviewer and Editor Form Policies/Reviewer Recommendation Policies’ section; or, click the Create/Edit Review Form link on the Create Custom Review Questions page.

On upgrade to v8.1, any existing Review Forms are carried forward, however the information contained in the Review Form is enhanced to contain more than the ‘Reviewer Instructions’ and ‘Review Form’ available in v8.0:
- A new ‘Hide’ checkbox appears below the existing Review Form Name text entry box, allowing old forms to be “retired” when there are changes made, such as a change to questions.

- A ‘Custom Review Questions’ section is added after the ‘Reviewer Instructions’ text entry box. This section is where the Custom Review Questions created above are associated with the Review Form (see below for more information).

- A text entry box called ‘Default Text for Comments to Author’ is added, enabling default text to be entered into the ‘Comments to Author’ box that appears for Reviewers.

- The existing ‘Review Form’ text entry box is renamed ‘Default Text for Comments to Editor’. The existing text in this field is retained at upgrade.

- A new Display Order section is added below the ‘Default Text’ boxes. This section allows the administrator to determine the order in which three segments display on the Review Form:
  - Custom Review Questions (when displayed)
  - Manuscript Rating Questions (when displayed)
  - Comments to Authors and Editors
To associate Reviewer Questions with a Review Form, click the ‘Select Questions’ button in the ‘Custom Review Questions’ section. This will open a pop-up window displaying all Reviewer questions create for your publication.
NOTE: If the question is in gray text, then the question has already been selected for this Review Form.

Select the question(s) to add to the Review Form, and click the ‘Add To Form’ button. The questions will now display in the ‘Custom Review Questions’ section. From here, the administrator determines if each question is Required for the Reviewer and/or Visible to other Reviewers. The overall order of the Review Questions may be changed by using the ‘Order’ boxes and clicking the ‘Update Item Order’ button.
NOTE: If you click the Remove link on this page, the Question will be removed from this particular Form only; it is not removed from the master list of Questions. Questions can be safely removed from a Review Form even if the Form has been used previously. This is because the Form only controls which questions are displayed, the order they are displayed in, and the ‘Required for Submission’ settings that are used for each question on the Reviewer Recommendation page for new reviews using this form. The Questions and related responses for past reviews remain saved in the database even if they are no longer selected as part of a Review Form.

The final configuration step is to apply the Review Form(s) to one or more Article Type/Reviewer Role combinations. This is done on the enhanced Review Form and Manuscript Rating Configuration page, accessed via the Match Review Forms to Article Types and Reviewer Roles link found in PolicyManager, and at the bottom of the Add/Edit Review Form page.
New in v8.1, a Review Form may be selected for a New submission, and a separate Form may be designated for all revised versions of the submission. Manuscript Rating Questions may still only be applied to New Submissions. Select the desired Review Form to be used for each Article Type / Reviewer Role combination, and submit the page.

NOTE: Because the new Review Form layout allows the administrator to select the display order of the Review Form Sections, the existing Edit Manuscript Rating Instructions page is modified to only contain the Rating Instructions to appear to Reviewers and Editors.
The order in which Manuscript Rating Questions and the Comments section appear to the Editor on the *Submit Editor's Decision* page is now configured on the *Edit Editor Form* configuration page, accessed via the *Create Editor Form* link in PolicyManager.
Sample Edit Editor Form page
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Review Questions and Responses Custom Report View

A new custom report view called ‘Review Questions and Responses’ is now added to the list of available views. This view appears in the ‘Table’ drop-down list on the Create Custom Report page.

The following output fields are available in this new view:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewer People ID [REVIEWER_QUESTIONS.PEOPLEID]</td>
<td>This field identifies the Reviewer in the People table</td>
</tr>
<tr>
<td>Review Assignment ID [REVIEWER_QUESTIONS.ROLEID]</td>
<td>This field identifies the Review Assignment with which this question and response are associated.</td>
</tr>
<tr>
<td>Alternate Reviewer [ROLEREVU.ALTERNATE]</td>
<td>Bit flag indicating whether the person is an Alternate Reviewer. This is set for the new ROLEREVU record created when an Editor selects an Alternate Reviewer. Values: 1=Alternate Reviewer 0=Not an Alternate Reviewer Note that Alternate Reviewers are deleted from the database when an Editor Decision is made.</td>
</tr>
<tr>
<td>Manuscript Number [REVIEWER_QUESTIONS.DOCUMENTID]</td>
<td>Identifies the submission with which this review is associated</td>
</tr>
<tr>
<td>Revision Number [REVIEWER_QUESTIONS.REVISION]</td>
<td>Identifies the revision of the manuscript with which this review is associated</td>
</tr>
<tr>
<td>Date Reviewer Invited [REVIEWER_QUESTIONS.RSTART]</td>
<td>The date on which the reviewer was invited to submit the review with which this question and response are associated</td>
</tr>
<tr>
<td>Date Invitation Accepted [REVIEWER_QUESTIONS.ACCEPTDATE]</td>
<td>The date on which the reviewer agreed to submit the review with which this question and response are associated</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Date Review Due</strong> [REVIEWER_QUESTIONS.DUEDATE]</td>
<td>The date on which the review with which this question and response are associated is/was due</td>
</tr>
<tr>
<td><strong>Date Review Submitted</strong> [REVIEWER_QUESTIONS.RSTOP]</td>
<td>The date on which the review with which this question and response are associated was submitted</td>
</tr>
<tr>
<td><strong>Reviewer Comments to Author</strong> [REVIEWER_QUESTIONS.AUTHORCOMMENT]</td>
<td>The text of the 'Reviewer Blind Comments to Author' for the review with which this question and response are associated</td>
</tr>
<tr>
<td><strong>Reviewer Comments to Editor</strong> [REVIEWER_QUESTIONS.EDITORCOMMENT]</td>
<td>The text of the 'Reviewer Confidential Comments to Editor' for the review with which this question and response are associated</td>
</tr>
<tr>
<td><strong>Custom Question Instructions</strong> [REVIEWER_QUESTIONS.INSTRUCTION]</td>
<td>Instructions (if any) available to the Reviewer for the question - these instructions are only displayed if the Reviewer clicks the [Instructions] link next to the question text at the time of the review</td>
</tr>
<tr>
<td><strong>Reviewer's Response</strong> [REVIEWER_QUESTIONS.Answers]</td>
<td>The Reviewer's response to this question - if the Reviewer selected multiple responses (e.g. from a multi-select dropdown list), they are all listed, separated by semi-colons</td>
</tr>
<tr>
<td><strong>Custom Question Response Type</strong> [REVIEWER_QUESTIONS.DATA_TYPE]</td>
<td>The type of response required for this question (e.g. date, scrolling selector, text)</td>
</tr>
<tr>
<td><strong>Hints:</strong></td>
<td>If the response type was a list, reference the Custom Question List Type field to determine what kind of list was offered.</td>
</tr>
<tr>
<td><strong>Reviewer Number</strong> [ROLE_REVIEW.RANK]</td>
<td>The first Reviewer to agree to review a manuscript is Reviewer Number 1. The second Reviewer to agree to review is Reviewer Number 2, etc. If a Reviewer is invited to review a revised manuscript that he had previously reviewed, he gets the same Reviewer Number he had in the earlier revision.</td>
</tr>
<tr>
<td><strong>Reviewer Recommendation</strong> [REVIEWER_QUESTIONS.RRESULT]</td>
<td>The Recommendation term that the Reviewer chose for the review with which this question and response are associated.</td>
</tr>
<tr>
<td><strong>Manuscript Rating</strong> [REVIEWER_QUESTIONS.DOCRATE]</td>
<td>The Overall Manuscript Rating entered by the Reviewer for the review with which this question and response are associated.</td>
</tr>
<tr>
<td><strong>Custom Question Text</strong> [REVIEWER_QUESTIONS.TEXT]</td>
<td>The text of the question as presented to the Reviewer at the time of the review.</td>
</tr>
<tr>
<td><strong>Custom Question List Type</strong> [REVIEWER_QUESTIONS.LIST_TYPE]</td>
<td>When a custom question uses a list type response, this identifies what kind of list is used.</td>
</tr>
<tr>
<td><strong>Use Default Value</strong> [REVIEWER_QUESTIONS.USE_DEFAULT_VALUE]</td>
<td>Indicates whether a default response was configured to be used for this question at the time of review.</td>
</tr>
<tr>
<td><strong>Hints:</strong></td>
<td>To find the actual default value, see the &quot;Default Value&quot; field.</td>
</tr>
<tr>
<td><strong>Min/Max Response Constraint Setting</strong> [REVIEWER_QUESTIONS_DEFINITIONS.MIN_MAX_FLAGS]</td>
<td>This field indicates whether the minimum and maximum limits are applied to this question. A value of ‘0’ indicates that neither the minimum nor the maximum applies, a value of ‘1’ indicates that the minimum applies, ‘2’ indicates that a maximum applies, etc.</td>
</tr>
</tbody>
</table>
and ‘3’ indicates that both minimum and maximum limits apply.

| Minimum Number of Response Selections [REVIEWER_QUESTION_DEFINITIONS.MIN_SELECTION] |
| For checkbox and multi-select list type responses, this is the publication-required minimum number of choices that must be selected if this question is required. |

| Maximum Number of Response Selections [REVIEWER_QUESTION_DEFINITIONS.MAX_SELECTION] |
| For checkbox and multi-select list type responses, this is the publication-defined maximum number of choices that may be selected. |

| Maximum Response Text Length [REVIEWER_QUESTION_DEFINITIONS.MAX_LENGTH] |
| The publication-configured maximum number of characters that may be entered in a text response to the specific question. |

| Review Rating [REVIEWER_QUESTIONS.REVRATE] |
| The numerical rating that the Editor gave the review with which this question and response are associated. |

| Additional Information Request Text [REVIEWER_QUESTIONS.Additional_Info_Text] |
| For Yes/No/Text type questions, additional information may conditionally be requested depending on the Reviewer's initial selection of "Yes" or "No". This is the text of the request displayed to the Reviewer when he or she chooses the configured "trigger" value. |

| Multiple Choice Options [REVIEWER_QUESTIONS.Available_Answers] |
| When a Reviewer is asked to choose one or more options from a pre-configured list of responses, this field contains a list of the options available to the Reviewer at the time of review. |

| Default Value [REVIEWER_QUESTIONS.Default_Value] |
| The default response (if any) presented to the Reviewer for this question at the time of review. |

**Hints:** To determine whether or not this value was presented to the Reviewer, check the "Use Default Value" field. For Yes/No/Text type questions, this field holds the text used to request additional information.

When a report is run using this View, the results will display one row for each question asked.

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.
Revised File Inventory Layout

The layout of the File Inventory page is enhanced in EM/PM v8.1 to provide a more consistent layout for users.

1. The existing ‘Select’ checkboxes and the associated Check All/Clear All links are moved to the left column.
2. The existing ‘Action’ column is moved to the second column.
3. The existing ‘CrossCheck’ and ‘Download Zip File’ buttons are moved to the left side of the page.

TO CONFIGURE:
No configuration required. The new layout is available on upgrade throughout EM/PM.
Support for Unicode Characters in Downloaded Transmittal Form

Prior to EM/PM v8.1, Publisher roles were able to download the Transmittal Form Metadata in a tab-delimited results file, suitable for importing into Excel or other reporting tools. These files were created in a non-Unicode text format, and Unicode characters did not appear in these files.

EM/PM v8.1 is enhanced to allow the Publisher to download the metadata file in the standard format (the same format as pre-version 8.1), or in Unicode (UTF-8) format. When the Publisher clicks the Download Metadata link in the Accepted Submissions Publisher folder, a new Download the data in Unicode format – UTF-8 link appears at the top and bottom of the page. Clicking this link will download a file containing the report results, including any Unicode characters that occur in the results.

NOTE: To open the file in Excel, Excel’s File Open menu must be used, followed by selecting ‘tab’ as the delimiter for the file. Do not double click the file to automatically open the Excel application. Opening the file by double clicking may result in the Unicode characters not displaying properly.
Procedure for Excel 2003:

1. In Editorial Manager, after clicking ‘Download the data file in Unicode format – UTF-8’, click the ‘Save’ button in the browser dialog box once the file has been prepared, and make a note of where you save the file. NOTE: The appearance of this dialog box depends on the browser.

2. Open the Excel application.

3. Click ‘File’, then ‘Open’ from the Excel 2003 menu, or the ‘File Open’ icon:
4. Browse to the file (where you just saved it), and click to open it.

6. In Step 2 of the Text Import Wizard, select ‘Tab’, then click the ‘Next’ button.

7. In Step 3 of the Text Import Wizard, click the ‘Finish’ button.
8. The Unicode characters should now display appropriately:

Procedure for Excel 2007:

1. In Editorial Manager, after clicking ‘Download the data file in Unicode format – UTF-8’, click the ‘Save’ button in the browser dialog box once the file has been prepared, and make a note of where you save the file. NOTE: The appearance of this dialog box depends on the browser.
2. Open the Excel 2007 application.
3. Click the ‘Office Button’ in the upper left corner, then ‘Open’ from the Excel 2007 menu, or the ‘Open’ icon in the Quick Access Toolbar (if configured):

4. Browse to the file (where you just saved it), and open it.

6. In Step 2 of the Text Import Wizard, select ‘Tab’, then click the ‘Next’ button.
7. In Step 3 of the Text Import Wizard, click the ‘Finish’ button.

8. The Unicode characters should display appropriately:
TO CONFIGURE:
No configuration is needed. The new link will appear automatically on the for all Publisher roles with ‘Download Metadata’ permission enabled.
Personal Classification Ranking

EM v8.1 introduces a new Personal Classification Ranking feature which allows and/or requires users to specify their levels of personal expertise for each selected Personal Classification (i.e. indicate the subject areas in which they are most knowledgeable and/or interested). Ranking information can be collected for all users, and is displayed on the People Information page which is universally accessible from numerous EM pages (including Reviewer selection pages and the Assign Editor page). When the Rankings feature is enabled for a publication, both staff and individual users have the ability to select Rankings.

This information can be used when an Editor is searching for Reviewer or Editor candidates to help identify the most appropriate person by checking the Personal Classification Rankings on the candidate’s People Information page.

Publications may choose to make this ranking optional or required for particular Reviewer and/or Editor Roles. When enabled, a new ‘Submit and Continue to Rankings’ button is added to the Select Personal Classifications pop-up, reached from the following pages:

1. Registration Page
2. Search People – Update Information
3. Update My Information (also displayed for first login following proxy registration)
4. Update Classifications and Keywords (deep link target page)

Partial page display; Select Classifications pop-up:

Clicking this button brings the user to the new Rank Personal Classifications pop-up. The top of this page may display instructions if customized by the publication (see the To Configure section for more information). Below the instructions a table displays all Classifications selected on the Select Personal Classifications pop-up window, with an option to rank the Experience level as ‘Low’, ‘Medium’ or ‘High’. Users may also select the ‘Remove’ checkbox for a Classification, which will remove this Classification from the user’s Personal Classifications list upon submitting the page.
NOTE: If the user is updating his own people record and Rankings are required, he will be forced to select Rankings when the calling page (e.g. Update My Information or Update Classifications and Keywords) is submitted.

Upon initially enabling the feature, no rankings will be put in place. Users who already have Classifications selected will see a new ‘Rank Personal Classifications’ button displayed on the following pages:

1. Registration Page
2. Search People – Update Information page
3. Update My Information page
4. Update Classifications and Keywords deep link target page

This button will always display after at least one Personal Classification has been selected.

The rank of each Classification (Low, Medium or High) will also display on the above pages. When first enabled, the text ‘No Ranking Selected’ will display for each Classification.

Sample of ‘Rank Personal Classifications’ button display, no Rankings selected:
Sample of ‘Rank Personal Classifications’ button display, some Rankings selected:

The People Information page, displayed when an authorized user clicks a person’s hyperlinked name on many EM pages, is enhanced to display Rankings in the Personal Classifications section.

[continued on next page]
TO CONFIGURE:
In PolicyManager, click the new Configure Personal Classification Rankings link in the ‘General Policies’ section. To enable the feature, check/select the ‘Enable Personal Classification Rankings’ box at the top of the page. This box is not selected on upgrade. When this option is enabled, a new ‘Rank Personal Classifications’ button appears on the following pages after at least one Personal Classification has been selected:

1. Registration Page
2. Search People – Update Information
3. Update My Information
4. Update Classifications and Keywords (deep link target page)

Once the box is selected/checked, select the desired Reviewer and/or Editor Roles that should be required to provide Classification Rankings. This is not required; when the feature is enabled, all users will see the ‘Rank Personal Classifications’ button, but this determines which users are required to provide the rankings.

Customized instructions may be entered in the bottom text area to display on the Rank Personal Classifications page. There are no default instructions; the text box is empty on upgrade.
Configure Personal Classification Rankings

When Personal Classification Rankings are enabled for your publication, all users will have the opportunity to select Rankings. You may also select specific Reviewer and/or Editor Roles, requiring users with these roles to rank each personal classification they select according to their level of expertise and subject interest.

- Enable Personal Classification Rankings

Select the Reviewer and/or Editor roles you want to require to Rank Personal Classifications when updating their people data. Note this is not enforced for new user registrations or user login; it is enforced when people are updating their people information. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

Enter any instructions that you would like to appear when the Rank Personal Classifications page is displayed.

Please rate your level of academic interest and expertise by selecting....

Cancel  Submit
ENTERPRISE ANALYTICS REPORTING ENHANCEMENTS

E-Mail and Scheduling Capabilities

EM/PM v8.0 introduced the Enterprise Analytics Reporting tool, allowing users enhanced EM/PM/CM reporting capabilities. New in v8.1, users of the EAR may use ‘Ad Hoc’ report e-mailing and be given permission to use e-mail scheduling capabilities.

In EM/PM v8.0, hovering the mouse over a report name on the EAR Main Menu without clicking displays one or two icons to the left of the report name. New in v8.1, one or two new icons appear in addition to the two existing icons:

- ‘E-mail’ - The ‘E-mail’ icon allows the user to e-mail the report results to a user.
- ‘Schedule’ - The ‘Schedule’ icon appears only for Editors with the new ‘Schedule Reports’ permission enabled. It allows one or more delivery schedules to be saved for a report. Once saved, the report is automatically e-mailed to the selected recipients per the saved delivery schedule. The report e-mail can contain a PDF of the report and/or a deep link to automatically log into the system and view the live report results.

These new links are also displayed in the Report Viewer toolbar:

And the Report Designer toolbar:

Clicking the ‘E-mail’ icon from the EAR Main Menu, Report Viewer toolbar or Report Designer toolbar brings opens a pop-up window where the logged in user chooses a letter template to start from. The drop-down list displays all letters configured in the new letter family called “Enterprise Analytics Reporting”.

Send Report by E-mail

The publication has pre-configured one or more letters which you may use as a starting point. Select a letter, then click ‘Customize Letter’ to open the letter, insert your comments, and send the letter.
After selecting a letter, the user clicks the ‘Customize Letter’ button, which brings them to the Customize Letter page. This page displays the header instructions, ‘From’, ‘To’, and ‘Subject’, and ‘CC:’ options as configured for the selected letter (see the ‘To Configure:’ section for more information).

Two new merge fields may be used in this e-mail letter:

1. %REPORT_NAME% - This merge field populates with the saved name of the report being emailed.
2. \%LIVE_REPORT_DEEP_LINK\% - This merge field populates with a deep link to the report viewer page for the report, running the report when the link is clicked. This link is populated only if the recipient has been selected from the list of Editors and therefore can be identified as an active registered user. When the recipient clicks the deep link, the user is fully logged into the system and taken directly to the Report Viewer page for the report.

- NOTE: The recipient must have ‘Produce Reports’ permission to see the report results page. If the recipient does not have this permission enabled, then clicking the deep link will present a message that they do not have permission to view the report:

```
Notice

Sorry, you cannot view this report. You do not have permission to view reports within the system. You may login to take other actions within the system.

Login to Editorial Manager
```

The user may elect to attach a PDF of the report to an outgoing e-mail by clicking the ‘Attach PDF of report to Letter’ checkbox, located above the letter body. When selected/checked, a PDF of the report is created in the background before the e-mail is sent, and then attached to the e-mail that is sent.

NOTE: If the PDF cannot be created, the e-mail is still sent, but an error message is sent to the sender of the email to notify them of the error.

After editing the body of the e-mail, selecting the recipient(s), and determining if a PDF should be included in the e-mail, the user clicks the ‘Preview and Send’ button to review the message that will be sent.
Clicking ‘Send E-mail’ will send the e-mail to the specified recipients.

Clicking the ‘Schedule’ icon from the EAR Main Menu, Report Viewer toolbar or Report Designer toolbar brings opens a pop-up window where the logged in user configures delivery schedule for this report.

The upper portion of the ‘Report Delivery Schedule’ has instructions to help users create the scheduled deliveries. This information is especially useful for users in a different time zone than the publication server (located in US Eastern Time).

The lower portion of the page is where the user configures the Delivery Schedule. The user enters the following information:

- **Schedule Description** – This box allows the user to name the schedule (e.g. if two weekly schedules are set up, they can be distinguished by description).
  - Duplicate schedule descriptions are not allowed for the same report.

- **Delivery Frequency** – This drop-down allows the user to determine the frequency with which the reports are delivered. Choices are ‘Daily’, ‘Weekly’, ‘Monthly’ and ‘Quarterly’. Weekly is the default choice for a new Delivery Schedule.
  - ‘Daily’ delivers the report on either all work days or all calendar days, depending on the due date preference selected on the Configure General Due Date Preferences page in PolicyManager.
  - ‘Weekly’ delivers the report on the same day of each week as the First Delivery Date. Example: The First Delivery Date is a Wednesday, so all subsequent reports are run on succeeding Wednesdays.
  - ‘Monthly’ delivers the report on the same numerical day of each month (i.e. January 5, February 5).
  - ‘Quarterly’ delivers on the same numerical day of every third month (e.g. Jan 15, Apr 15).
- First Delivery Date – The date defaults to the next calendar day. Schedule reports are delivered in the early hours of the day, so the next available report run will be the next calendar day. Users may choose any day, but it must be a date other than today and cannot be a date in the past.

- Additional Deliveries – This drop-down allows the user to define how many times the report will be delivered. The report may be delivered from 1-25 times, with the default value being 5.

  NOTE: The number of times the report is delivered is based on the scheduled dates, not the number of recipients (i.e. if the report is e-mailed on January 12, 2011 to 8 people, this is counted as 1 scheduled delivery).

  If either ‘Monthly’ or ‘Quarterly’ are selected in the ‘Delivery Frequency’ section, then an additional option appears under the Additional Deliveries drop-down that reads ‘Automatically use the last day of each month as the delivery date’. This allows the system to send a report on the last day of a month, regardless of what that date may be (28th, 29th, 30th, or 31st).

- Letter – This box contains all letters in the ‘Enterprise Analytics Reporting’ letter family, listed in alphabetical order by letter purpose.

  The user may elect to attach a PDF of the report to an outgoing e-mail by clicking the ‘Attach PDF of report to Letter’ checkbox, located above the letter body. When selected/checked, a PDF of the report is created in the background before the e-mail is sent, and then attached to the e-mail that is sent.

  NOTE: If the PDF cannot be created, the e-mail is still sent, but an error message is sent to the sender of the email to notify them of the error.
When the user has finished configuring the Delivery Schedule, she clicks the ‘Save Delivery Schedule and Customize Letter’ button. The user is brought to the Customize Letter page, where she can select additional recipients, edit the letter, etc.

![Customize Letter page]

- From: “The DEMO Journal” <shopkins@ariesc.com>
- To: ALL EDITORS, AMSTERDAM HANDLING EDITOR
- Letter Subject: Please Review the Report
- Letter Body:

  Dear %REALNAME%

  Please review the attached report, %REPORT_NAME%.

  %LIVE_REPORT_deep_link%

  Be advised that you will receive this report %NUMBER_OF REMAINING_DELIVERIES% more times.

  %SCHEDULE_DESCRIPTION%

  Sincerely,

  -Publication
After the user makes his edits, he clicks the ‘Preview and Save E-mail’ button to see a preview of the letter.

Clicking the ‘Save Delivery Schedule and Letter’ button saves the scheduled delivery. The user sees a confirmation page, and then clicks the ‘Close’ button to return to the Report Delivery Schedule page. The saved Delivery Schedule appears in the lower portion of the page.

Partial page display; Saved Delivery Schedule displayed:

In addition to the above two merge fields, the following two new merge fields may be used in the scheduled delivery e-mail letters:

1. %NUMBER_OF_REMAINING_DELIVERIES% – This merge field calculates the number of total deliveries remaining for a scheduled report delivery. This is calculated from the original delivery selection less the number of deliveries to date (including the delivery in which the merge field is displayed).

2. %SCHEDULE_DESCRIPTION% – This merge field pulls in the schedule description associated with the saved delivery schedule.

Users with ‘Schedule Reports’ permission may edit existing Scheduled Deliveries at any time. This is done by clicking the ‘Edit’ link next to the selected Schedule on the Report Delivery Schedule page. The user may make the following changes:

- Schedule Description – This box allows the user to edit the name of the schedule.
- Delivery Frequency – The saved frequency displays, but can be edited by the user if desired.

- First Delivery Date – The date of the first delivery is displayed. If the first delivery has not yet taken place (is in the future), then the date is editable for the user.

- Additional Deliveries – If at least one delivery has already been made, red text displays that reads “X deliveries have already been made” where X = number of deliveries. The user may select one of two radio buttons:
  - Continue with the current schedule, followed by the number of remaining deliveries.
  - Add on X more deliveries to the current schedule, where X = a drop-down of 1-25. This allows the user to add additional deliveries to what remains.

If the first delivery date is in the future, the drop-down appears with 1-25, as it does on when a new scheduled report is being added.

- Letter – The letter that is sent may be changed, and the user may also elect to change the ‘Attach PDF…’ setting.

The user may cancel out of this edit page at any time by clicking ‘Cancel’, and no changes will be made to the scheduled report. Alternately, the user may click ‘Submit’ to commit the changes and return the user to the Report Delivery Schedule page, or click the ‘Submit Delivery Schedule and Customize Letter’ button to edit the contents of the saved letter.
NOTE: Clicking the existing ‘Delete’ icon next to a report name on the EAR Main Menu brings up a warning to the user if there are one or more saved delivery schedules associated with the report.

TO CONFIGURE:
The Enterprise Analytics Reporting tool must be enabled for a publication by an Aries Customer Service Representative.

When this feature is enabled, Editor roles with ‘Produce Reports’ permission will have the new option of e-mailing report results from the EAR Main Menu, or from within a report. To allow Editor roles to schedule report deliveries, go to RoleManager, Editor Role, and enable the new ‘Schedule Reports’ permission, added as a sub-permission of the existing ‘Produce Reports’. When enabled, users may schedule reports to be delivered using the new Scheduling capability.

Editor RoleManager; partial page display

A new EM letter family - ‘Enterprise Analytics Reporting’ – is created to support this feature. Letters added to this Letter Family are available when sending an ‘on the fly’ report e-mail, or when configuring a scheduled report delivery.

Letters in the new family have the following elements:

- Custom Instructions – Information entered into this text area display on the Send Report by E-mail page.
- Sender’s E-mail Address – This may be either the e-mail address of the user triggering the correspondence or the Publication’s e-mail as configured on the Set "Email From" Address page in PolicyManager.
• Recipient – There are three options for Recipient available for selection:
  o Display text box so sender can insert an e-mail address – adds a blank text box on
    the Customize page
  o Display the following e-mail address for the recipient: followed by a text box –
    allows the administrator to enter one or more e-mail addresses to receive the letter
    whenever it is sent
  o Display Editor list for recipients – when selected, a multi-selector box displays on
    the customize letter page allowing the sender to select one or more Editors, or entire
    Editor roles as recipients.

• CC Options – There are two CC options available for the letter template:
  o Automatically cc the following e-mail address, followed by a text box – allows the
    administrator to enter one or more e-mail addresses to receive the letter whenever it
    is sent
  o Display blank textbox so sender can insert any e-mail address for a cc

Four new merge fields are added for use in Enterprise Analytics Reporting e-mail:

1. %REPORT_NAME% – This merge field populates with the saved name of the report
   being emailed.

2. %LIVE_REPORT_DEEP_LINK% – This merge field populates with a deep link to
   the report viewer page for the report, running the report when the link is clicked. This
   link is populated only if the recipient has been selected from the list of Editors and
   therefore can be identified as an active registered user. When the recipient clicks the
   deep link, the user is fully logged into the system and taken directly to the Report Viewer
   page for the report.

3. %NUMBER_OF_REMAINING_DELIVERIES% – This merge field calculates the
   number of total deliveries remaining for a scheduled report delivery. This is calculated
   from the original delivery selection less the number of deliveries to date (including the
   delivery in which the merge field is displayed). This merge field is available for
   scheduled reports only.

4. %SCHEDULE_DESCRIPTION% – This merge field pulls in the schedule description
   associated with the saved delivery schedule. This merge field is available for scheduled
   reports only.

The %LIVE_REPORT_DEEP_LINK% merge field generates a deep link in the e-mail of
recipients (where a people record can be identified). The Deep Link Expiration can be set for
this merge field in PolicyManager, on the new Set Enterprise Analytics Reporting Deep Link
Expiration Policy page, accessed via Set Enterprise Analytics Reporting Deep Link in the
‘General Policies’ section. The link may be set to expire after a preset number of clicks, a preset
number of days, or not at all (by not selecting/checking either box).
On upgrade, the default selection is ‘Expire link after 1 click’.
COMMERCE MANAGER ENHANCEMENTS

Fees Requiring Action Report

In EM/PM v8.0, there are three Commerce Manager Reports used by publication staff to track and manage fees and payments:

1. Bill Me Report
2. Manage Waiver Requests Report
3. E-Commerce Status Report

These three reports provide visibility to submissions with fees, where the Author has paid the fee, requested a waiver, or requested a bill.

New in v8.1, the “Fees Requiring Action Report” is added to the suite of Commerce Manager Reports. This new report exposes submissions with fees that are not covered by the existing three reports. Specifically, the Fees Requiring Action Report provides visibility to:

- **Unacknowledged Fees** – The publication has assessed a fee to the Author (e.g. publication charge, color charge, page charge, etc.) but the Author has ignored the request for payment. Specifically, the Author has not come to the Fees and Payments page, and has not requested a bill, requested a waiver, or paid the fee.

- **Abandoned Credit Card Payments** – The Author has elected to pay by credit card, but abandoned the process before successfully completing the credit card transaction. Specifically, the Author has selected ‘Credit Card’ as the payment method on the Fees and Payments page, but then quit out of EM without clicking the yellow ‘Pay Now’ button that launches the interaction with PayPal. Alternately, the Author has made it all the way to the PayPal interface but then does not complete the credit card transaction for some reason. If a credit card payment is abandoned, the Author can remedy the situation by returning to EM and clicking the ‘Pay Now’ button again, for as many attempts as it takes to execute the payment. He can also select another payment method (e.g. Bill Me or Request Waiver, if the fee is configured to accept these options).

**NOTE:** Abandoned credit card payments are different than the ‘Incomplete PayPal Transactions’ found on the E-Commerce Status Report. ‘Incomplete PayPal Transactions’ represent transactions that ‘break down’ between EM and PayPal, including any failures from the point the Author leaves EM (clicks the yellow ‘Pay Now’ button to navigate to PayPal) and the credit card actually being charged (i.e. PayPal screens where the credit card information is entered, amount verified, etc.). Abandoned credit card payments found on the new Fees Requiring Action Report represent transactions where the Author entered an expired credit card number in PayPal, the name on the credit card does not match the credit card number entered, the user’s browser crashed, etc.

For publications using Commerce Manager, the Fees Requiring Action Report is automatically displayed in the Fees and Payments section of the following menus:
1. Editorial Main Menu
2. Production Tasks Menu
3. Publisher Main Menu
4. Publisher Production Tasks Menu

Clicking the Fees Requiring Action Report link navigates to a selection criteria page where the user can search for all fees requiring action, or refine the search criteria, just like the other CM reports.

NOTE: Unlike the other CM Reports, there is no ‘Transaction Criteria’ section because the aim of this report is to expose all unacknowledged and abandoned fees. There is also a ‘Run Report’ button at the top of the page, which functions just like the ‘Submit’ button. The reason for a redundant button called ‘Run Report’ is so it is clear to users that they are not required to specify any Optional Criteria before running the report.
The results page looks very similar to other CM reports. Relevant data items and action links are displayed.
TO CONFIGURE:
No additional configuration is required. On upgrade to v8.1, publications using Commerce Manager will automatically see the new Fees Requiring Action Report link displayed in the Fees and Payments section of the Editorial Main Menu, Production Tasks Menu, Publisher Main Menu and Publisher Production Tasks Menu.
PRODUCTION TRACKING ENHANCEMENTS

Reassign Submission and Schedule Group Production Tasks

In PM v8.0, there are times when a production task is assigned to a recipient and that recipient is unable to complete the task assignment. In those situations, the task must be cancelled by the assignor and a second task assignment must be created from scratch.

New in PM v8.1, the assignee who cannot carry out the task may now pass the task on to another recipient without office intervention. Alternately, the original assignor can also reassign the task.

When an Editor or Publisher is assigned a Submission or Schedule Group Production Task with the new ‘Allow Recipient to Reassign’ option enabled, then they will see a new ‘Reassign Task’ Action Link in the ‘Submission Tasks Assigned to Me’ or ‘Schedule Group Tasks Assigned to Me’ folder.

In addition, any Editor or Publisher who assigned a task and has permission to cancel that task assignment may now reassign that task instead. For this purpose the new ‘Reassign Task’ Action link is also added to the ‘Submission Tasks I have Assigned’ and ‘Schedule Group Tasks I Have Assigned’ folders.

'Submission Tasks Assigned to Me' folder

Clicking this link from any of the four folders listed above opens a ‘Reassign Production Task’ page, which behaves like the ‘Assign Production Task’ page with the following enhancements:

- The list of possible recipients (as configured for the selected task) is displayed, excluding the person who originally received the task. If there is only one other person to whom the task may be assigned, that person is automatically selected. If there are no other potential assignees, the user is presented with a warning alerting them that they may not reassign the task.
- The new due date for the reassigned task is calculated as if the task were originally assigned on the current date; the prior due date does not carry over to the new assignee.
• The ‘Assign Task’ letter sent to the original recipient is used as the starting point for the ‘Reassign Task’ letter so that any custom information that was added is initially retained. However, the user may still customize the text of the letter to the new assignee.

• The original set of Assignment files from the task being reassigned will be copied automatically for the new task (no file grids are displayed).

On submitting the Reassign Task page, the system cancels the original assignment and then creates a new Task Assignment record with the same task type and assignment files as the original assignment, but with new Due Date and Assignee. The original Task Assignment will appear in the Production Status Grid as a cancelled task, if the task type is so configured. The ‘Reassign Task’ letter is sent to the new assignee and the ‘Cancel Assignment’ letter configured for this task type is sent to the original assignee. If none is configured, no notice of cancellation will be sent.

NOTE: If the task assignee uses the new Reassign Task action link, they do not have to have a Role selected under ‘Can Be Assigned By’ for that task type; the Reassign Task link ignores that permission to allow assignment of the same type of task.
TO CONFIGURE:
In PolicyManager, select either ‘Configure Submission Production Tasks’ or ‘Configure Schedule Group Production Tasks’ in the Preprint Manager section. Edit an existing task, or create a new task if desired.

If the task can be assigned to ‘Selected Editor/Publisher Roles only’, a new ‘Allow Recipient to Reassign’ option is available. Select/check this option to allow the recipient to reassign the task.

NOTE: This option is not available for tasks that must be assigned to the Corresponding Author.
Partial Page Display: Configure Submission Production Task

**Edit Submission Production Task**

- **Cancel**
- **Submit**

**New Production Task Name:**

- Insert Special Character

**Maximum Production Task Name is 100 characters**

- Hide: When you hide a Production Task Name, the Production Task Name will be deactivated (not available for assignment).

**Assignment Options**

Typing text into the Custom Instructions will display an "Instructions" link when the recipient views their task assignments. Leave this field empty to suppress this link.

**Production Task Custom Instructions:**

- Please fix the artwork

Only roles with the "Assign Production Task" permission appear in this list. You may select multiple roles or de-select a role by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac).

**Can be Assigned by:**

- Artwork Editor
- Managing Editor
- Production Team

**Can be Assigned to:**

- Corresponding Author only
- Selected Editor/Publisher Roles only

Only roles with the "Receive Production Task" permission appear in this list. You may select multiple roles or de-select a role by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac).

**Follow-on Task Assignments** allow the selected editors/publishers who complete this kind of task to immediately assign another task. Remember to configure the Can be Assigned by permissions for the tasks you wish to follow-on from this one.

- Allow follow-on Task Assignments

**FTP Options**

This permission allows the task recipient to reassign the same task to another user. The recipient must have a publisher or editor role (corresponding authors may not reassign tasks), but it does not need to be one of the Can be Assigned by roles for this task.

- Allow Recipient to Reassign
Hide Multiple Companion Files

Currently, users who wish to hide companion files on the File Inventory pages must hide each file individually. EM/PM v8.1 introduces a new method of selecting multiple companion files and hiding them in a single action.

A new button, ‘Hide Selected Companion Files’, is added to the File Inventory page for both individual submissions and Schedule Groups, directly underneath the ‘Download Zip File’ button, under the following circumstances:

1. Companion files are displayed on the page AND
2. The user viewing the page is logged in as an Editor or Publisher role with ‘Upload, Hide and Restore Companion Files’ permission enabled.
Users with proper permission may select multiple companion files to be hidden by checking/selecting the appropriate box in the ‘Select’ column, then clicking the ‘Hide Selected Companion Files’ button.

NOTE: EM/PM will examine the selected companion files to ensure they are not associated with an open Submission or Schedule Group production task. Files associated with an open Production Task may not be hidden.

After one or more companion files have been hidden, they appear in the Hidden Companion Files grid at the bottom of the File Inventory page, as do any files that were hidden by using the existing Hide link. The files can be restored individually by clicking the Restore link, available to users with ‘Upload, Hide and Restore Companion Files’ permission.

NOTE: When a companion file is hidden for a Schedule Group, it is also hidden for the individual submission with which it is associated. This is also true for a companion file hidden on an individual submission associated with a Schedule Group; the file is also hidden for the Schedule Group.
TO CONFIGURE:
No configuration required. The new ‘Hide Selected Companion Files’ button appears for all Editor and Publisher roles with ‘Upload, Hide and Restore Companion Files’ permission enabled.