CONFIDENTIAL AND PROPRIETARY

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

Document Change Log

Date	Version	Change
10/05/2010	Beta Release	Beta version
11/10/2010	Gamma Release	Include two new sections from beta supplement: • Review Questions and Responses Custom Report View • Personal Classification Ranking
12/21/2010	General Release	Fix image on page 46

Editorial Manager/Preprint Manager 8.1 General Release Notification

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.

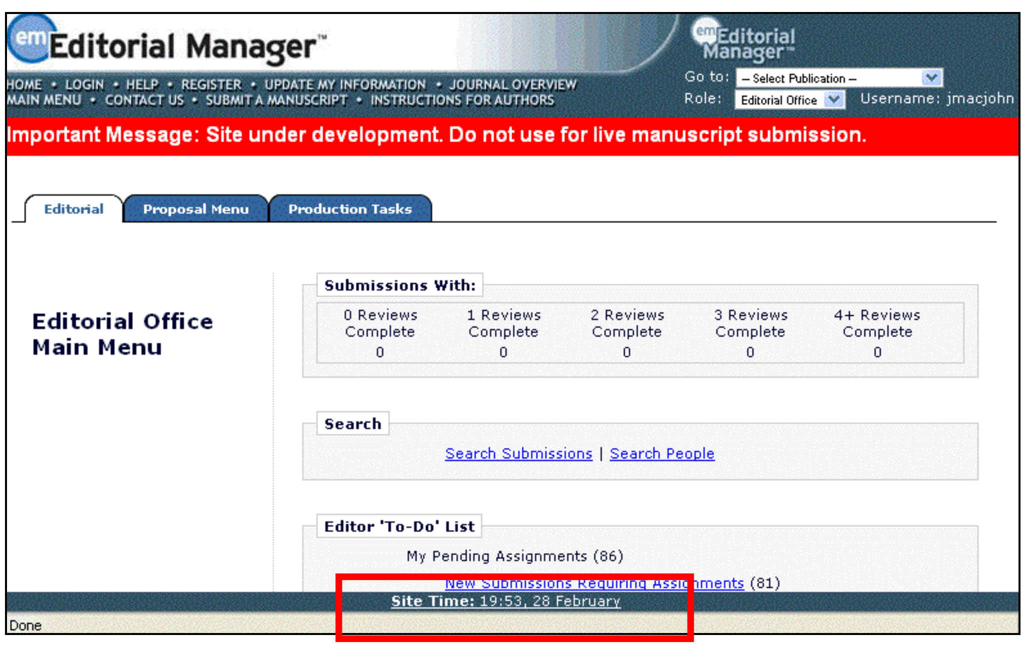
New in EM/PM v8.1, publications may configure their site to display the user's own current, local time and date next to the current time and date for the EM Site (US Eastern time). Displaying the two times in this way makes it clearer to the user that the site may be working in a different time zone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

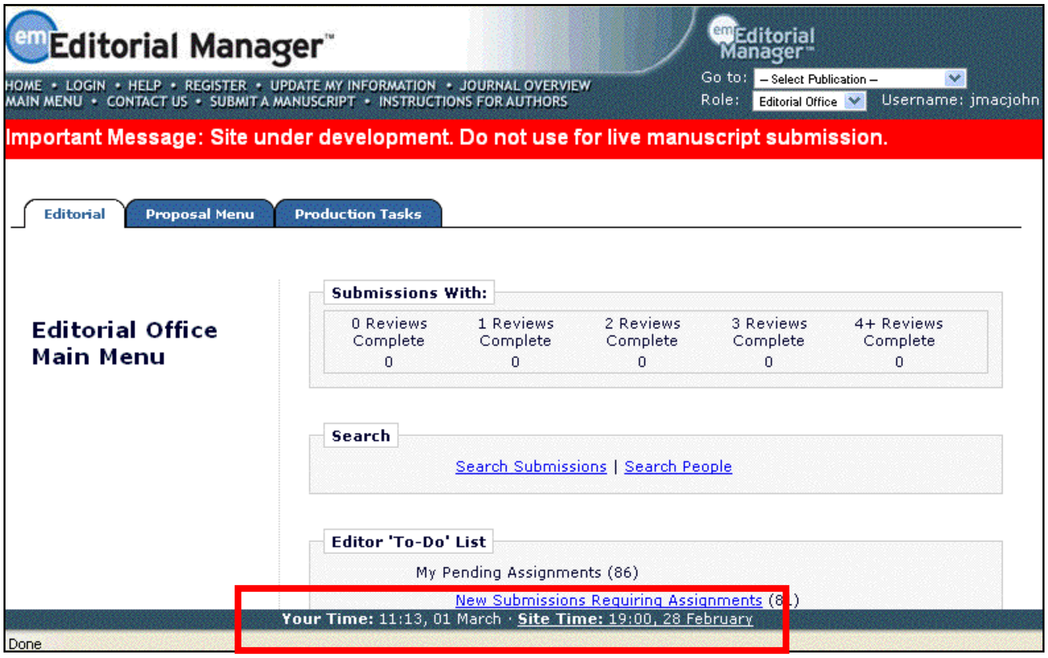
Site time: 19:00, 28 February



Editorial Manager Preprint Manager Commerce Manager

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:

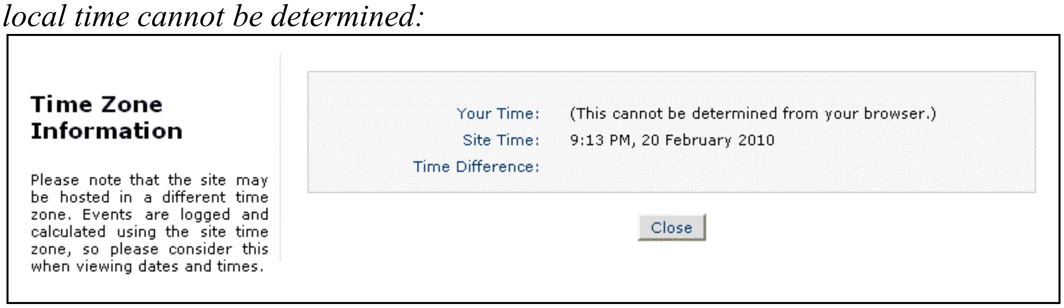
Your Time: 11:00, 01 March · **Site Time:** 19:00, 28 February



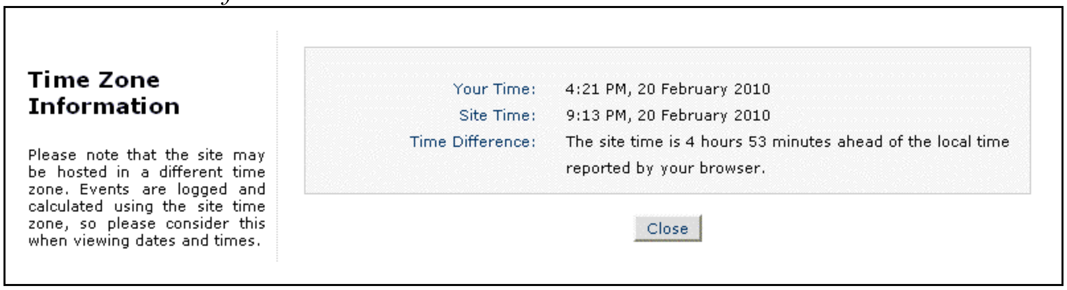
NOTE: The time/date displays in the 24-hour clock format, with only the day and month displayed.

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).

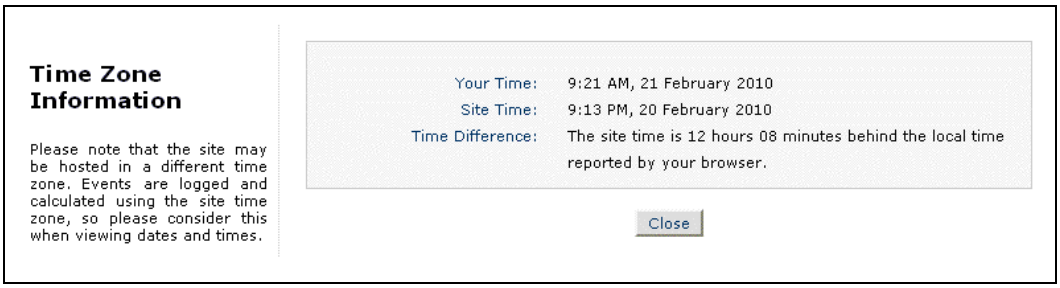
User's local time cannot be determined:



Site time zone is ahead of user:



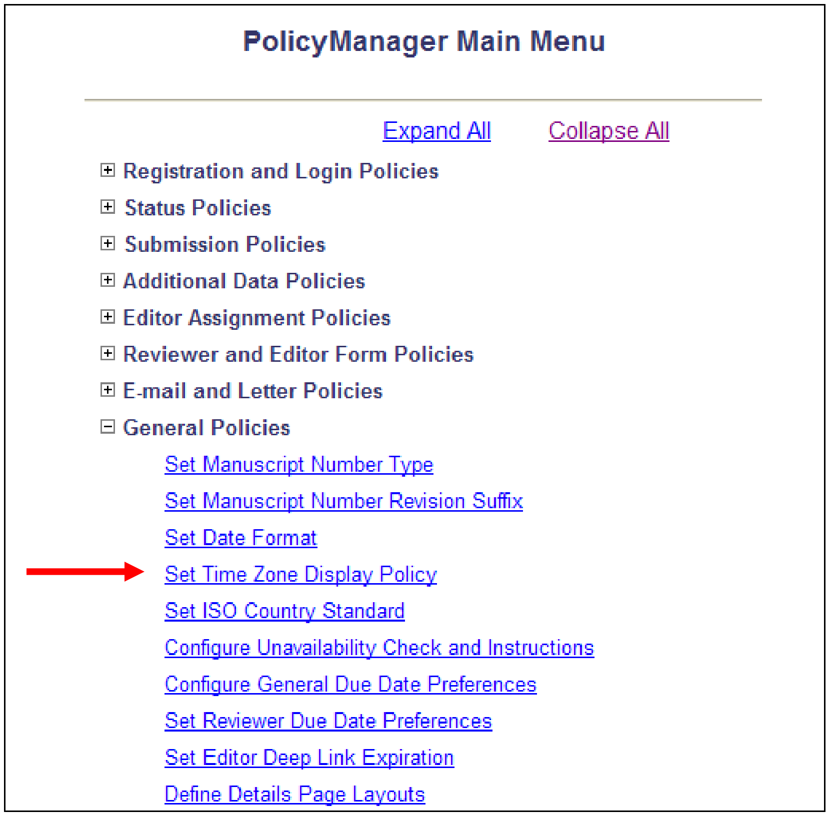
Site time zone is behind user:



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:*

Reviewer Recommendation and Comments for Manuscript Number INFORM-2009-20

Cultural Sensitivity to and Interpretation of Basic Geometric Shapes

Original Submission
Fir Black (Reviewer 1)

Recommendation [No Recommendation] Overall Manuscript Rating (1 - 100)

[Cancel] [Save & Submit Later] [Upload Reviewer Attachments] [Proof & Print] [Proceed]

For your convenience, and to take advantage of word processing features (e.g., spell-check, bullets, numbering), we suggest you use your regular word processing program (e.g., Microsoft Word, WordPerfect) when typing your review. You should then **Copy and Paste** your comments into the boxes provided. Click the **Save & Submit Later** button to save your comments and continue working.

[Reviewer Instructions]

Manuscript Rating

Please select a number to indicate your level of agreement with the following questions. Select the lowest value to indicate that you disagree entirely, or the highest value to indicate that you agree completely. Please answer '1' to the third question if you read these instructions.

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

N/A 1 2 3

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

N/A 1 2 3 4 5

*Are you a spam-bot?

N/A 1 2 3 4 5 6 7 8 9 10

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

N/A 1 2 3 4 5 6 7 8 9 10

Review Questions

Date response type

*On what date did you review this manuscript?

(mm/dd/yyyy)

Text response type

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

Character Count: 0

Notes response type

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

Character Count: 0

Decimal response type

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

List: radio buttons response type

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

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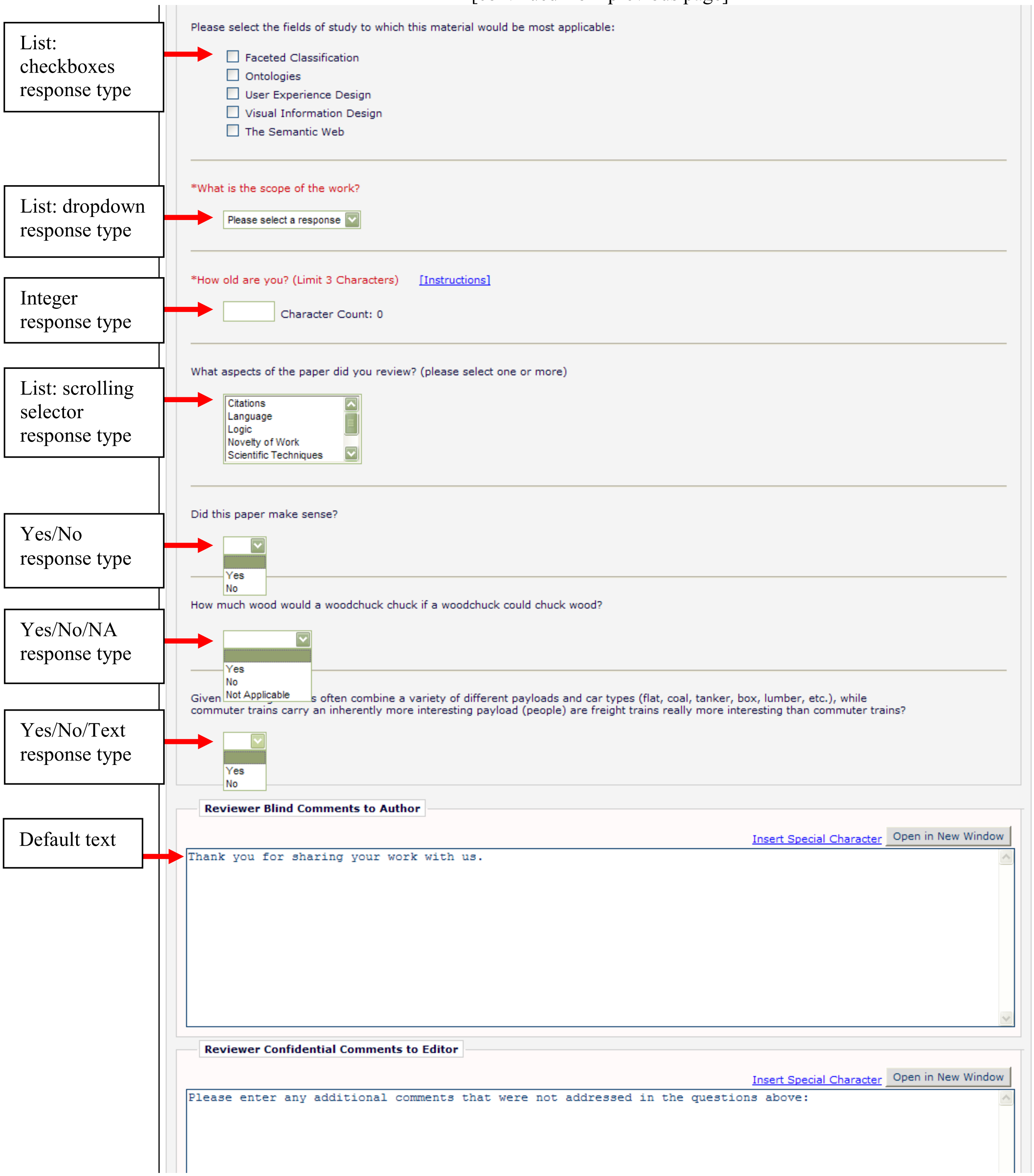

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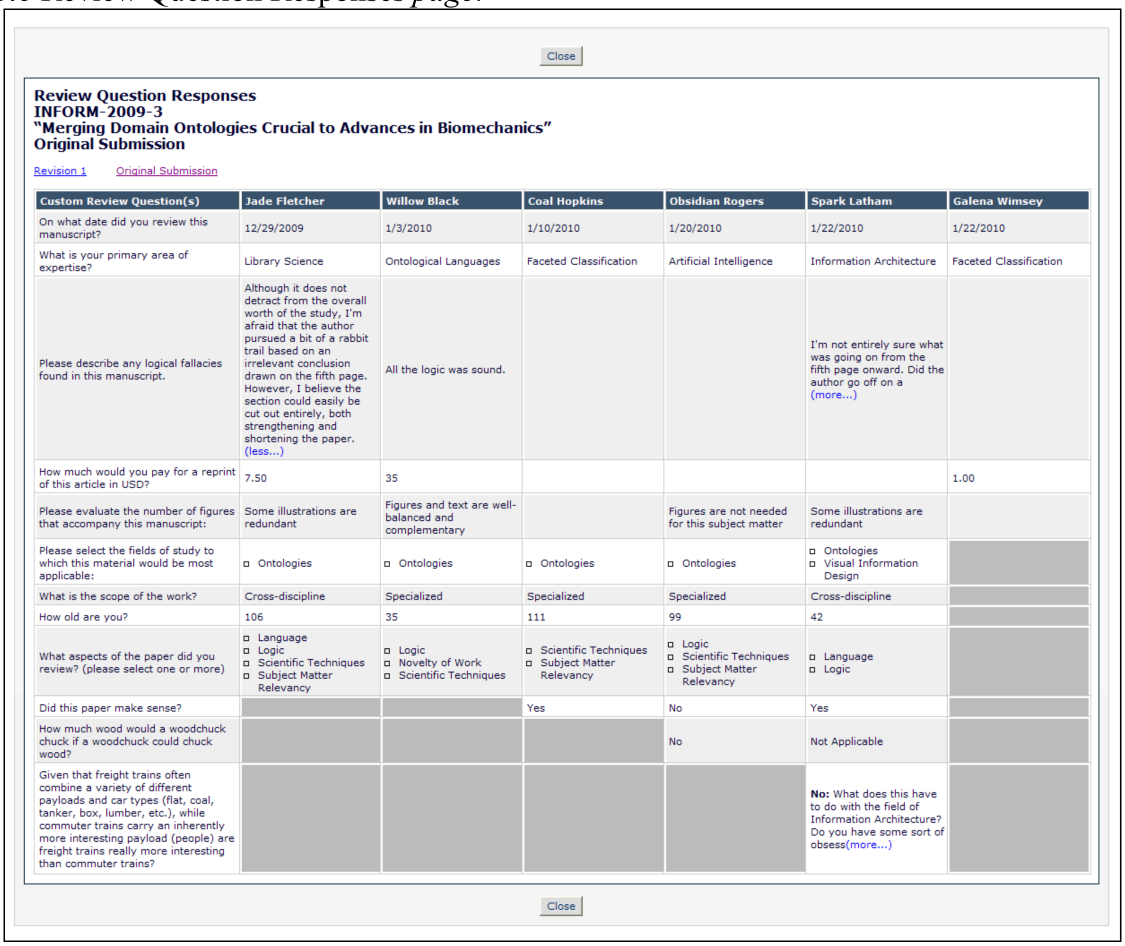
Once a Review has been successfully submitted to the editorial office, Editors with access to the *View Reviews and Comments* page for a submission will be able to view the Reviewer's responses on the *View Individual Reviewer Comments* page, or on a new *View Review Question Responses* page, which displays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

Sample Review Question Responses *page:*



Close

Review Question Responses
INFORM-2009-3
"Merging Domain Ontologies Crucial to Advances in Biomechanics"
Original Submission

Revision 1 Original Submission

Custom Review Question(s)	Jade Fletcher	Willow Black	Coal Hopkins	Obsidian Rogers	Spark Latham	Galena Wimsey
On what date did you review this manuscript?	12/29/2009	1/3/2010	1/10/2010	1/20/2010	1/22/2010	1/22/2010
What is your primary area of expertise?	Library Science	Ontological Languages	Faceted Classification	Artificial Intelligence	Information Architecture	Faceted Classification
Please describe any logical fallacies found in this manuscript.	Although it does not detract from the overall worth of the study, I'm afraid that the author pursued a bit of a rabbit trail based on an irrelevant conclusion drawn on the fifth page. However, I believe the section could easily be cut out entirely, both strengthening and shortening the paper. (less...)	All the logic was sound.			I'm not entirely sure what was going on from the fifth page onward. Did the author go off on a (more...)	
How much would you pay for a reprint of this article in USD?	7.50	35				1.00
Please evaluate the number of figures that accompany this manuscript:	Some illustrations are redundant	Figures and text are well-balanced and complementary		Figures are not needed for this subject matter	Some illustrations are redundant	
Please select the fields of study to which this material would be most applicable:	Ontologies	Ontologies	Ontologies	Ontologies	Ontologies Visual Information Design	
What is the scope of the work?	Cross-discipline	Specialized	Specialized	Specialized	Cross-discipline	
How old are you?	106	35	111	99	42	
What aspects of the paper did you review? (please select one or more)	Language Logic Scientific Techniques Subject Matter Relevancy	Logic Novelty of Work Scientific Techniques	Scientific Techniques Subject Matter Relevancy	Logic Scientific Techniques Subject Matter Relevancy	Language Logic	
Did this paper make sense?			Yes	No	Yes	
How much wood would a woodchuck chuck if a woodchuck could chuck wood?				No	Not Applicable	
Given that freight trains often combine a variety of different payloads and car types (flat, coal, tanker, box, lumber, etc.), while commuter trains carry an inherently more interesting payload (people) are freight trains really more interesting than commuter trains?					**No:** What does this have to do with the field of Information Architecture? Do you have some sort of obsess(more...)	

Close

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).

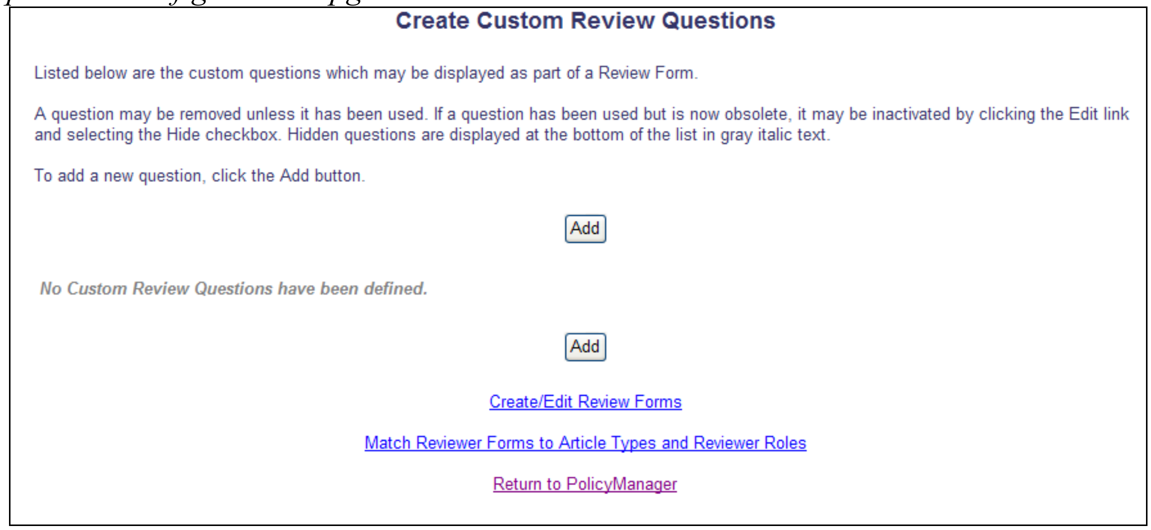
NOTE: The Rating Questions are not modified in v8.1; these Rating Questions continue to function as in v8.0.

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.

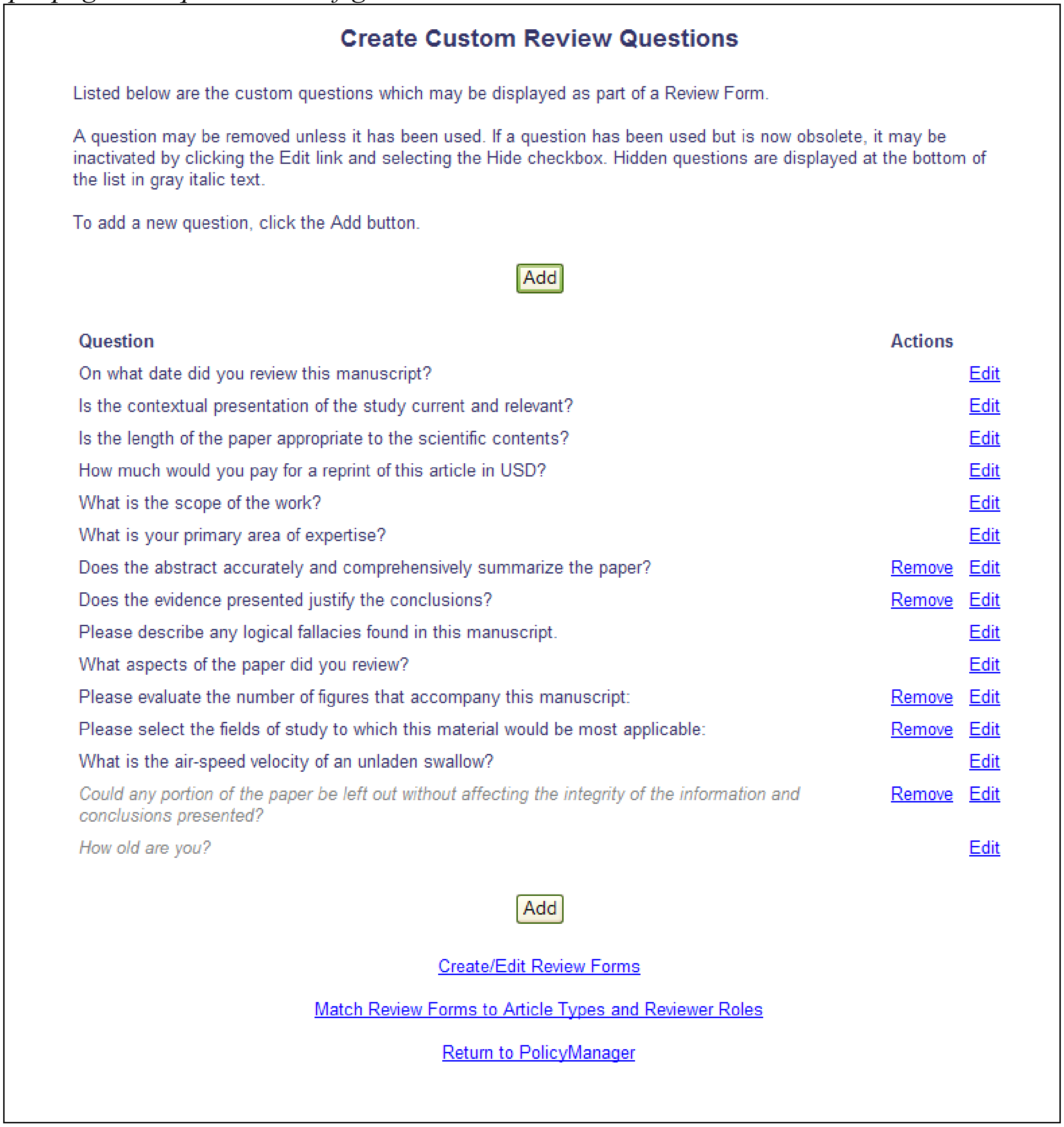
Add

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.

Add

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

Add

Create/Edit Review Forms

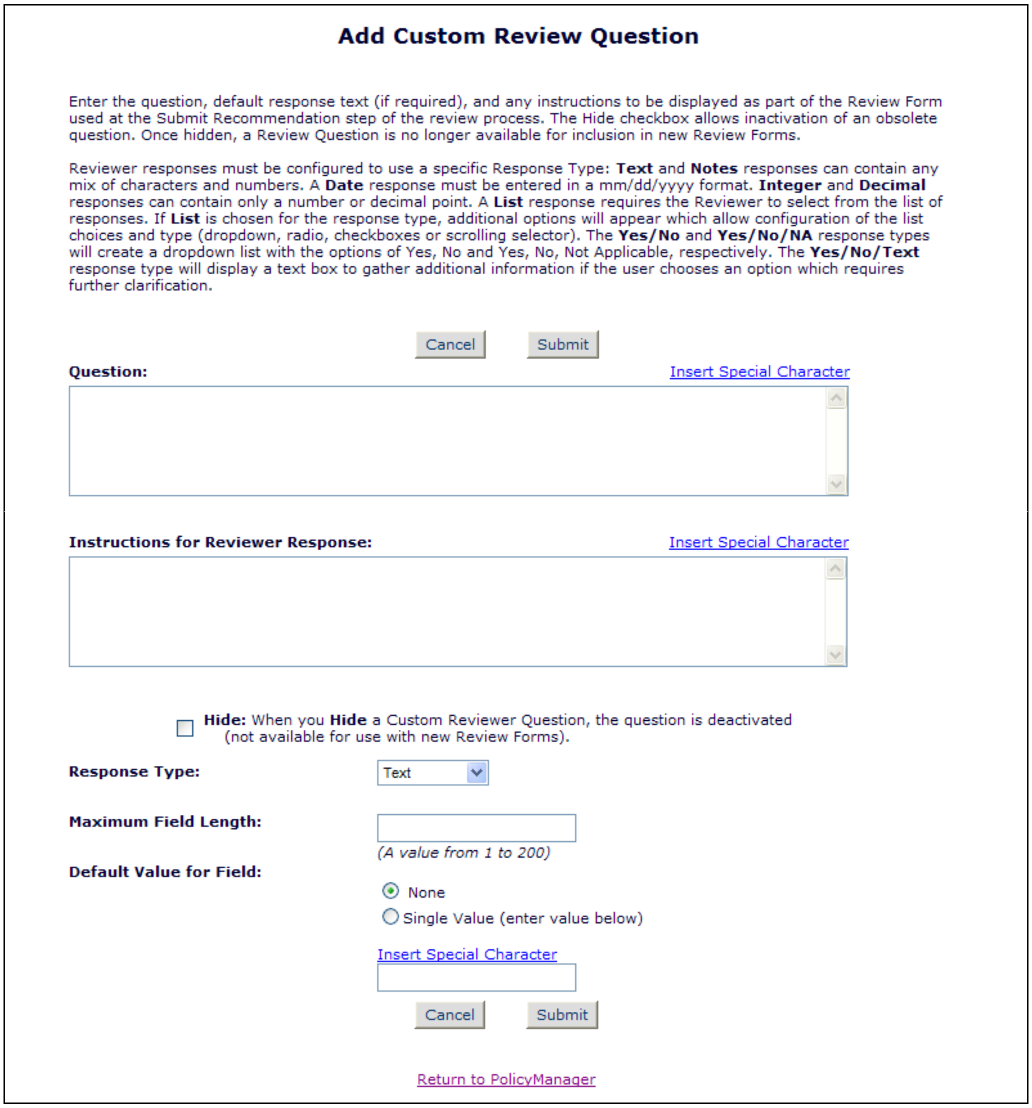
Match Review Forms to Article Types and Reviewer Roles

Return to PolicyManager

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.



Add Custom Review Question

Enter the question, default response text (if required), and any instructions to be displayed as part of the Review Form used at the Submit Recommendation step of the review process. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Review Question is no longer available for inclusion in new Review Forms.

Reviewer responses must be configured to use a specific Response Type: **Text** and **Notes** responses can contain any mix of characters and numbers. A **Date** response must be entered in a mm/dd/yyyy format. **Integer** and **Decimal** responses can contain only a number or decimal point. A **List** response requires the Reviewer to select from the list of responses. If **List** is chosen for the response type, additional options will appear which allow configuration of the list choices and type (dropdown, radio, checkboxes or scrolling selector). The **Yes/No** and **Yes/No/NA** response types will create a dropdown list with the options of Yes, No and Yes, No, Not Applicable, respectively. The **Yes/No/Text** response type will display a text box to gather additional information if the user chooses an option which requires further clarification.

Cancel Submit

Question: Insert Special Character

Instructions for Reviewer Response: Insert Special Character

Hide: When you **Hide** a Custom Reviewer Question, the question is deactivated (not available for use with new Review Forms).

Response Type: Text

Maximum Field Length:

(A value from 1 to 200)

Default Value for Field:

None

Single Value (enter value below)

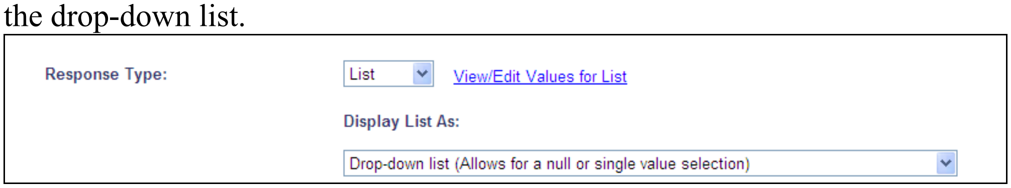
Insert Special Character

Cancel Submit

Return to PolicyManager

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.



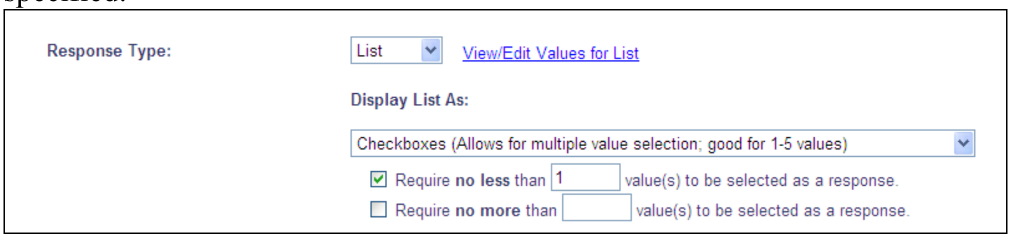
Response Type: List View/Edit Values for List

Display List As:

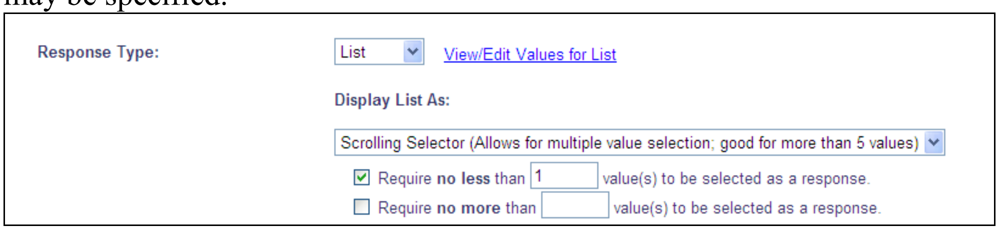
Drop-down list (Allows for a null or single value selection)

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.



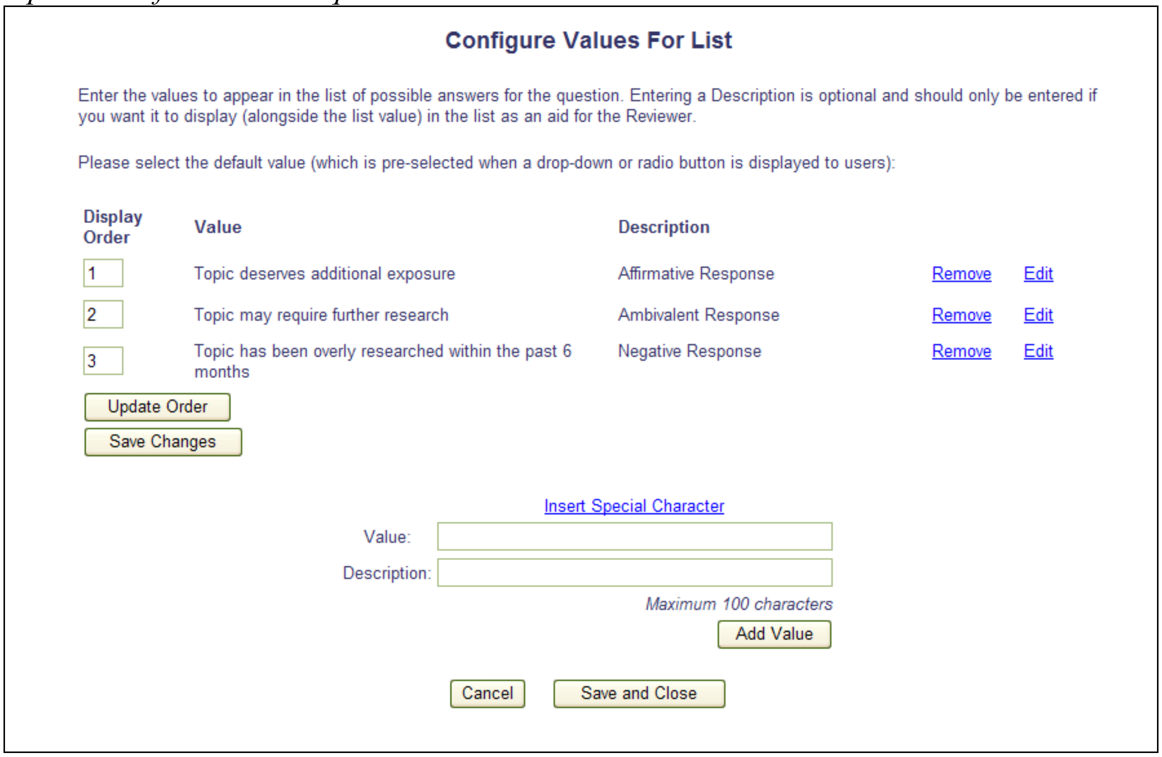
4. ‘Scrolling Selector (Allows for multiple value selection; good for more than 5 values)’ – The Reviewer would see a scrolling selector box, where he can select one or more answers. The minimum/maximum number of selections the Reviewer is allowed to make may be specified.



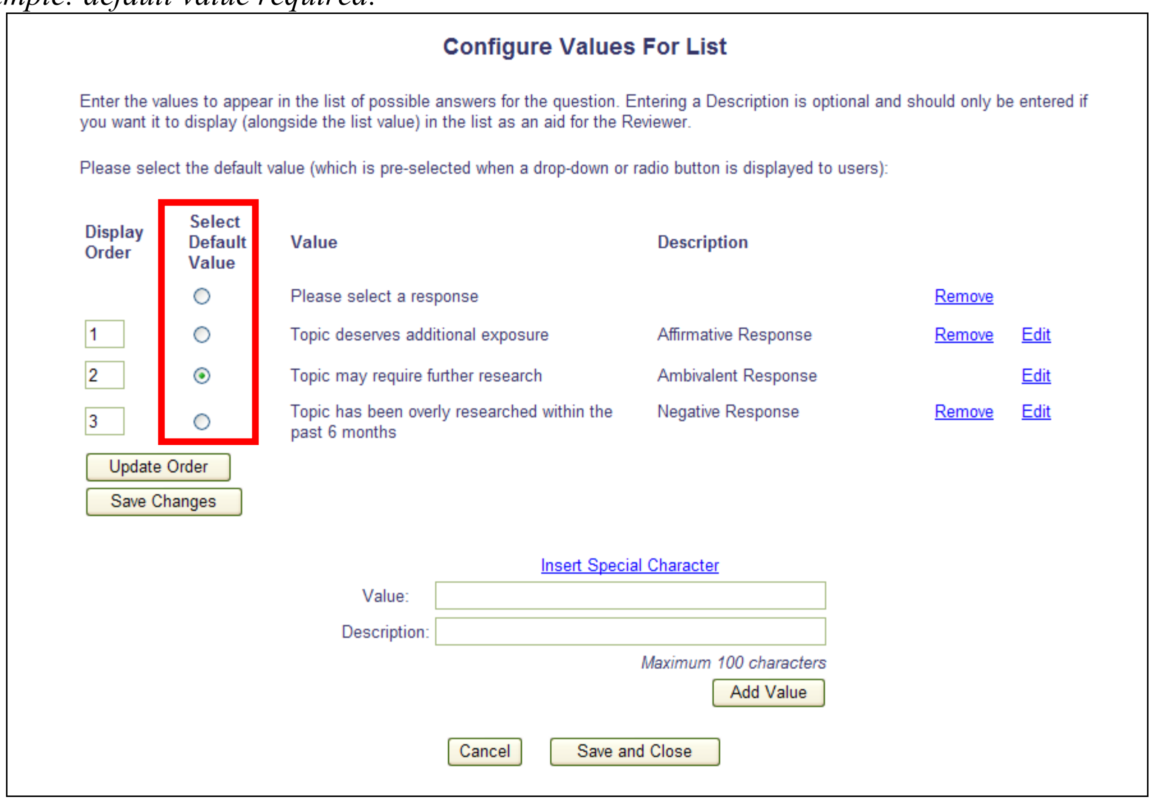
Clicking the View/Edit Values for List link navigates the Administrator to one of two versions of the *Configure Values for List* page, depending on whether the List Display option selected on the previous page requires definition of a default value. From these pages the Administrator can customize the 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

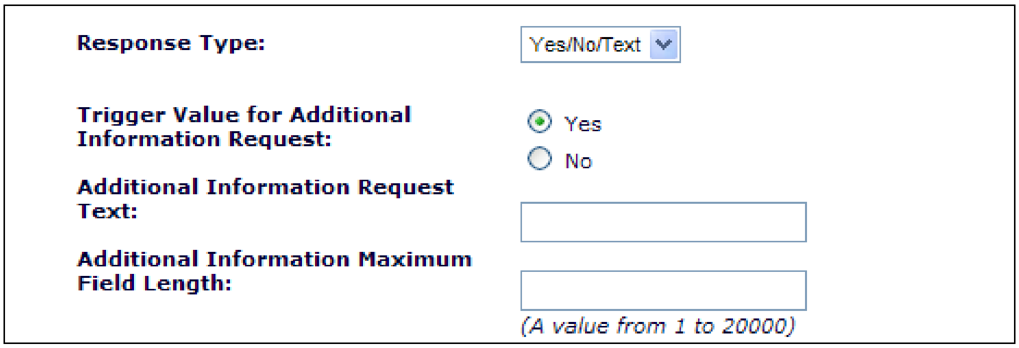


Example: default value required:



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



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.

Sample 'Edit' page where the question has been used; fields that may not be edited are greyed out:

Edit Custom Review Question

Enter the question, default response text (if required), and any instructions to be displayed as part of the Review Form used at the Submit Recommendation step of the review process. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Custom Review Question is no longer available for inclusion in new Review Forms.

Reviewer responses must be configured to use a specific Response Type: **Text** and **Notes** responses can contain any mix of characters and numbers. A **Date** response must be entered in a mm/dd/yyyy format. **Integer** and **Decimal** responses can contain only a number or decimal point. A **List** response requires the Reviewer to select from the list of responses. If **List** is chosen for the response type, additonal options will appear which allow configuration of the list choices and type (dropdown, radio, checkboxes or scrolling selector). The **Yes/No** and **Yes/No/NA** response types will create a dropdown list with the options of Yes, No and Yes, No, Not Applicable, respectively. The **Yes/No/Text** response type will display a text box to gather additional information if the user chooses an option which requires further clarification.

To maintain historical integrity, certain aspects of questions that have been used may not be modified. These fields are disabled below.

Cancel Submit

Question: Insert Special Character

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

Instructions for Reviewer Response: Insert Special Character

Hide: When you **Hide** a Custom Review Question, the question is deactivated (not available for use with new Review Forms).

Response Type: Yes/No/Text

Trigger Value for Additional Information Request: Yes / No

Additional Information Request Text: Please justify your incorrect response.

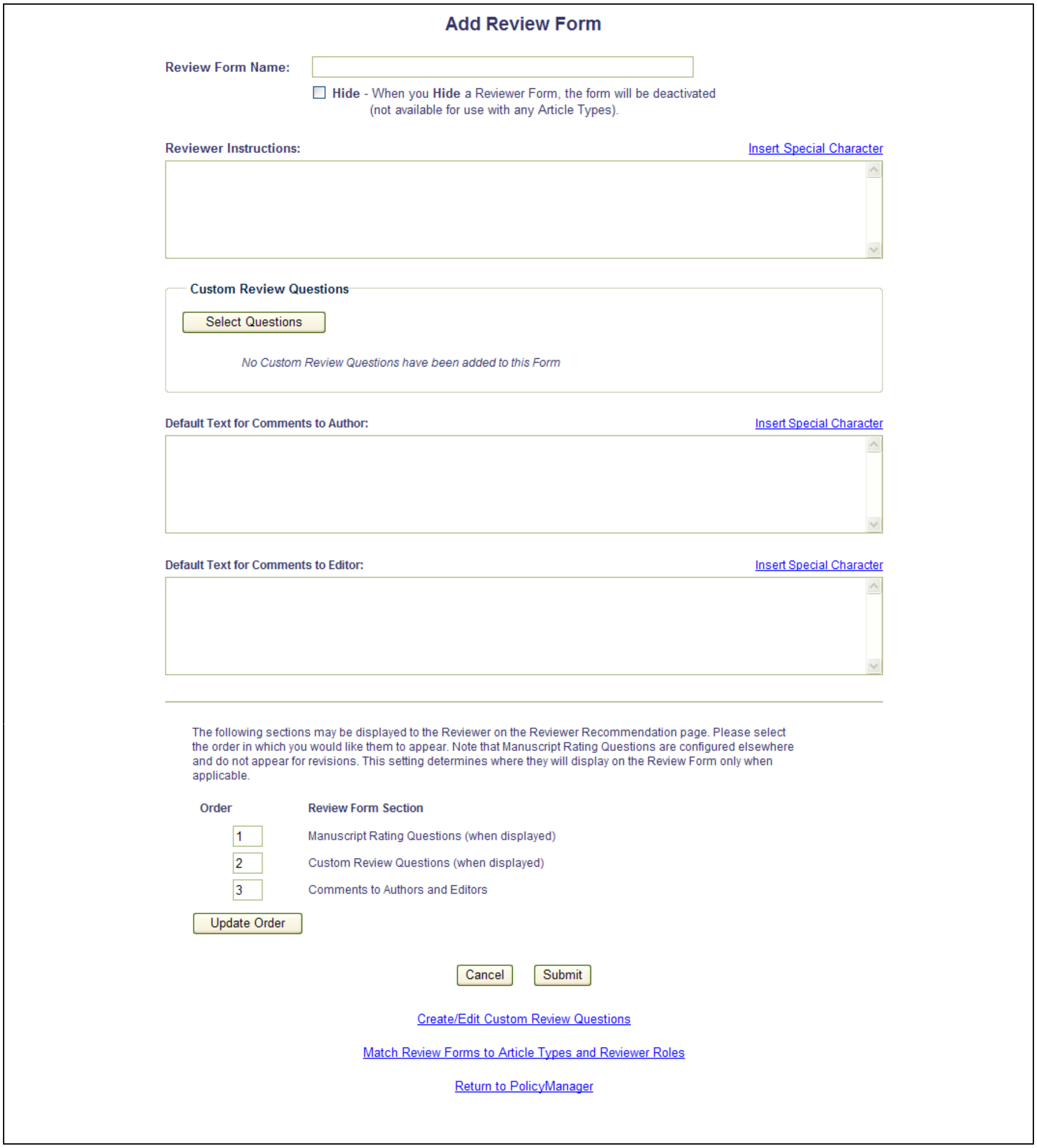
Additional Information Maximum Field Length: *(A value from 1 to 20000)*

Cancel Submit

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



Add Review Form

Review Form Name:

☐ **Hide** - When you **Hide** a Reviewer Form, the form will be deactivated (not available for use with any Article Types).

Reviewer Instructions: Insert Special Character

Custom Review Questions

Select Questions

No Custom Review Questions have been added to this Form

Default Text for Comments to Author: Insert Special Character

Default Text for Comments to Editor: Insert Special Character

The following sections may be displayed to the Reviewer on the Reviewer Recommendation page. Please select the order in which you would like them to appear. Note that Manuscript Rating Questions are configured elsewhere and do not appear for revisions. This setting determines where they will display on the Review Form only when applicable.

Order	Review Form Section
1	Manuscript Rating Questions (when displayed)
2	Custom Review Questions (when displayed)
3	Comments to Authors and Editors

Update Order

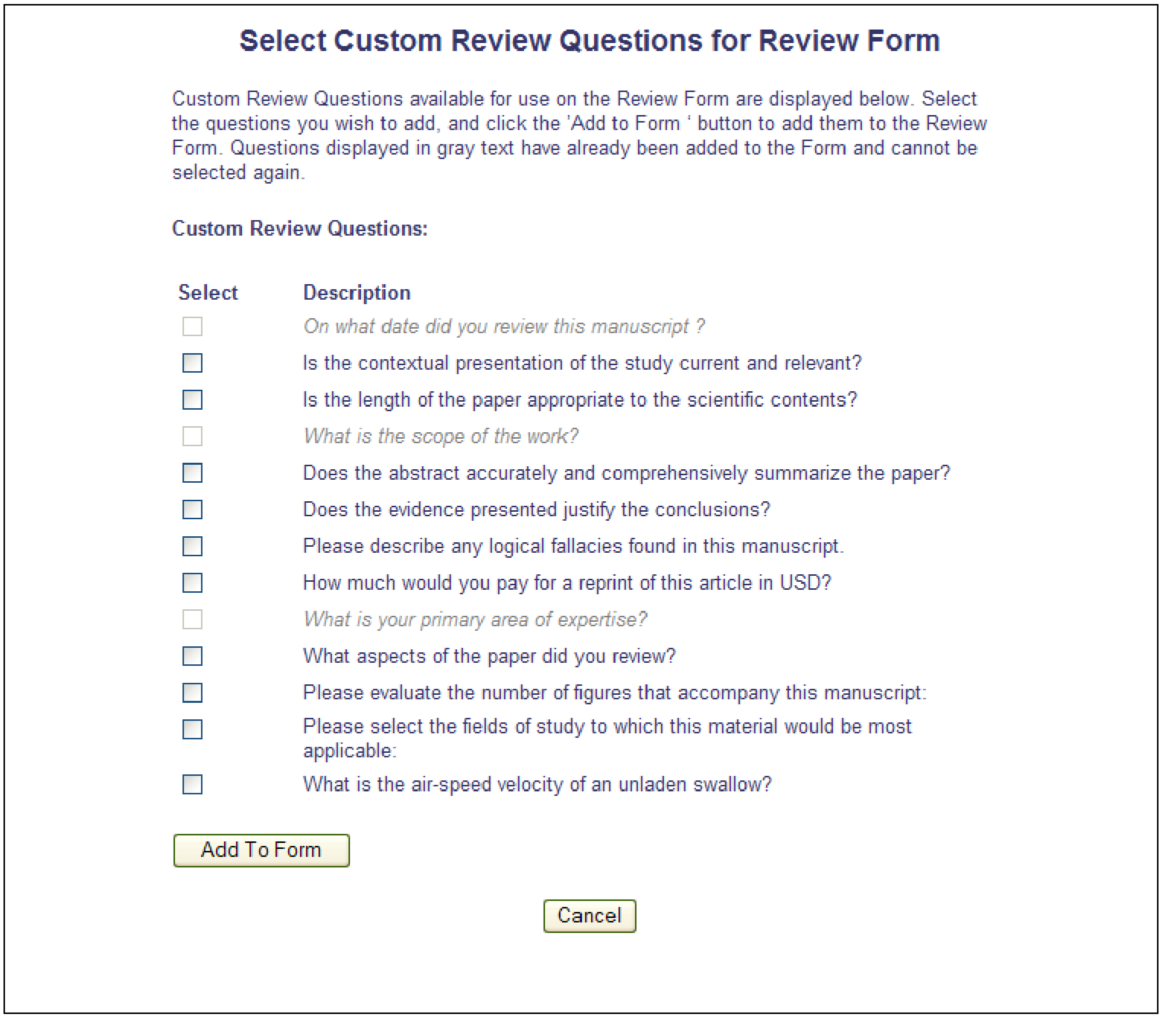
Cancel Submit

Create/Edit Custom Review Questions

Match Review Forms to Article Types and Reviewer Roles

Return to PolicyManager

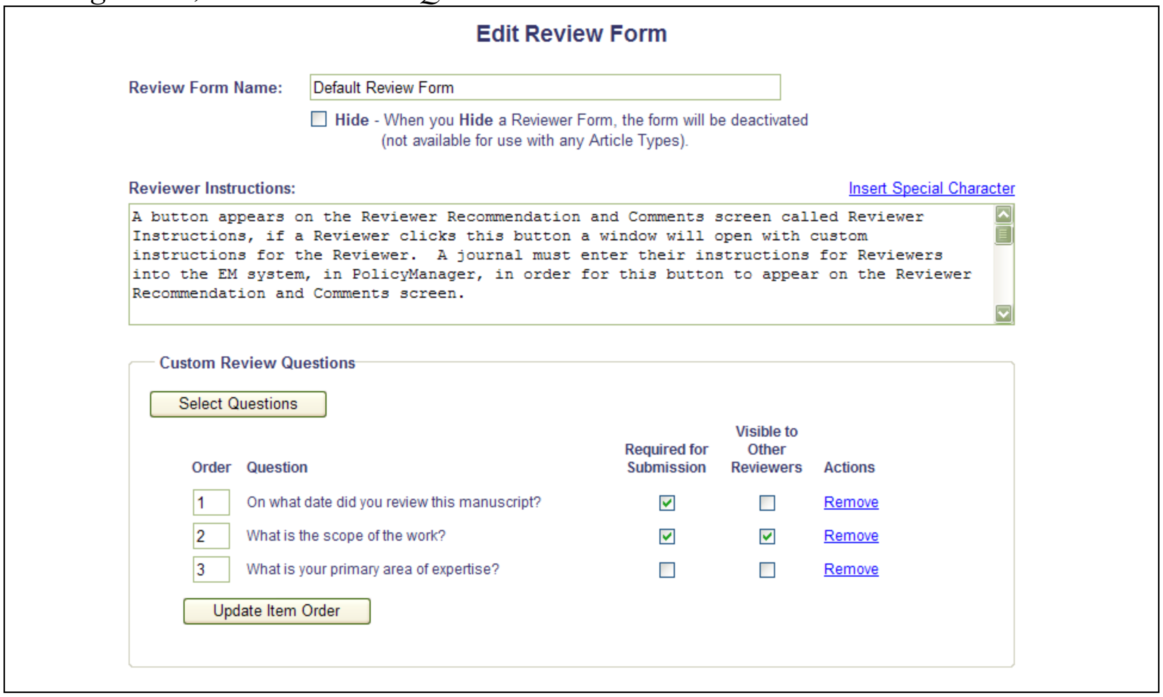
To associate Reviewer Questions with a Review Form, click the 'Select Questions' button in the 'Custom Review Questions' section. This will open a pop-up window displaying all Reviewer questions create for your publication.



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.

Partial Page View; Custom Review Questions selected:



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.

Review Form and Manuscript Rating Configuration

In the grid below, please specify the Review Form to use for each Article Type / Reviewer Role combination. Checking "Use Manuscript Rating Questions" turns on Manuscript Rating Questions for Reviewers of the specified Article Types. Use the "Select" link to choose which Manuscript Rating Questions to use for the associated Article Type and Reviewer Role.

Cancel Submit

Reviewer Role / Article Type	Reviewer	Technical Reviewer
Original Study	New: Original Study Review Form - New Submission ☑ Use Manuscript Rating Questions Select Revised: Original Study Review Form - Revised Sub	New: Technical Review Form ☑ Use Manuscript Rating Questions Select Revised: Technical Review Form
Editorial	New: Editorial Review Form ☑ Use Manuscript Rating Questions Select Revised: Default Review Form	New: Technical Review Form ☑ Use Manuscript Rating Questions Select Revised: Default Review Form
Review	New: Default Review Form ☑ Use Manuscript Rating Questions Select Revised: Default Review Form	New: Technical Review Form ☑ Use Manuscript Rating Questions Select Revised: Default Review Form
Round Table Discussion	New: Default Review Form ☑ Use Manuscript Rating Questions Select Revised: Default Review Form	New: Technical Review Form ☑ Use Manuscript Rating Questions Select Revised: Default Review Form
Industry Update	New: Default Review Form ☑ Use Manuscript Rating Questions Select Revised: Default Review Form	New: Default Review Form ☑ Use Manuscript Rating Questions Select Revised: Default Review Form

Cancel Submit

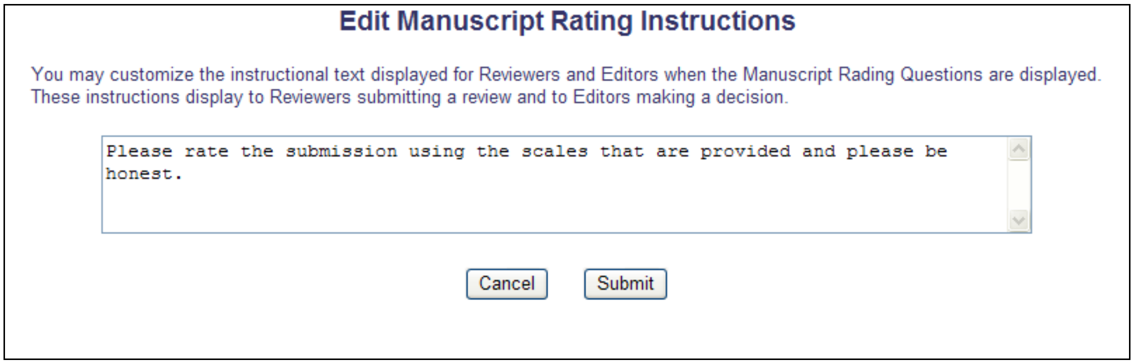
Edit Manuscript Rating Questions

Create/Edit Review Forms

Return to PolicyManager

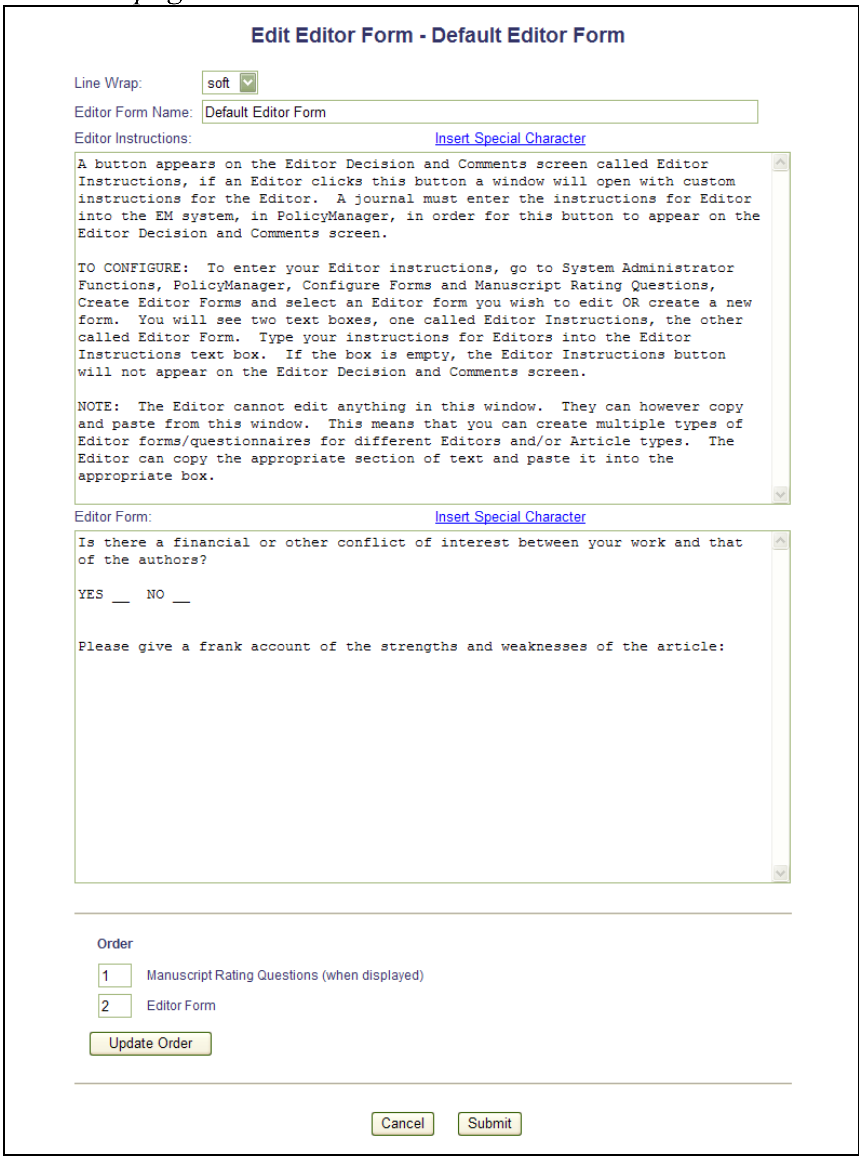
New in v8.1, a Review Form may be selected for a New submission, and a separate Form may be designated for all revised versions of the submission. Manuscript Rating Questions may still only be applied to New Submissions. Select the desired Review Form to be used for each Article Type / Reviewer Role 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*



Edit Editor Form - Default Editor Form

Line Wrap: soft

Editor Form Name: Default Editor Form

Editor Instructions: Insert Special Character

A button appears on the Editor Decision and Comments screen called Editor Instructions, if an Editor clicks this button a window will open with custom instructions for the Editor. A journal must enter the instructions for Editor into the EM system, in PolicyManager, in order for this button to appear on the Editor Decision and Comments screen.

TO CONFIGURE: To enter your Editor instructions, go to System Administrator Functions, PolicyManager, Configure Forms and Manuscript Rating Questions, Create Editor Forms and select an Editor form you wish to edit OR create a new form. You will see two text boxes, one called Editor Instructions, the other called Editor Form. Type your instructions for Editors into the Editor Instructions text box. If the box is empty, the Editor Instructions button will not appear on the Editor Decision and Comments screen.

NOTE: The Editor cannot edit anything in this window. They can however copy and paste from this window. This means that you can create multiple types of Editor forms/questionnaires for different Editors and/or Article types. The Editor can copy the appropriate section of text and paste it into the appropriate box.

Editor Form: Insert Special Character

Is there a financial or other conflict of interest between your work and that of the authors?

YES __ NO __

Please give a frank account of the strengths and weaknesses of the article:

Order

1 Manuscript Rating Questions (when displayed)

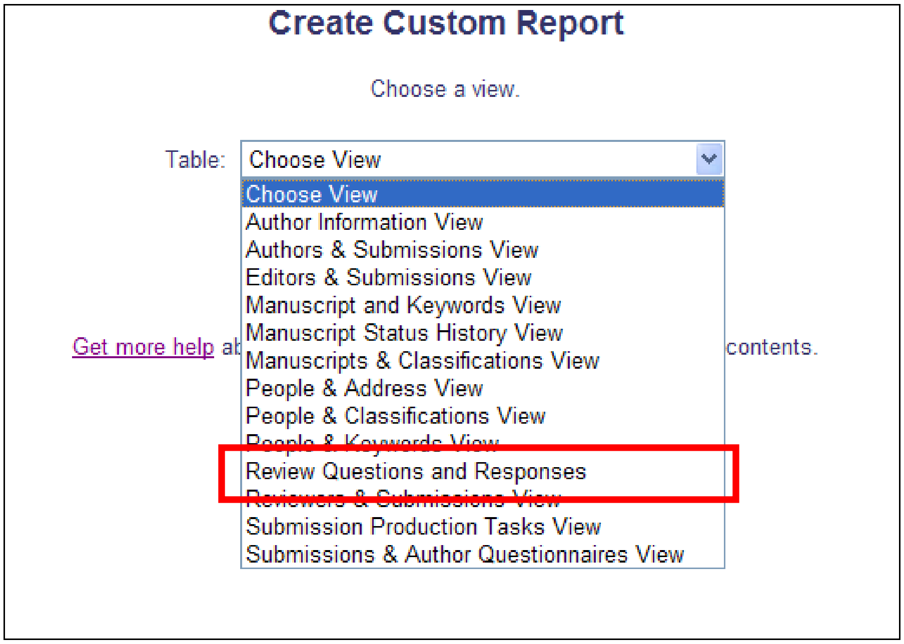
2 Editor Form

Update Order

Cancel Submit

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:

Reviewer People ID [REVIEWER_QUESTIONS.PEOPLEID] This field identifies the Reviewer in the People table
Review Assignment ID [REVIEWER_QUESTIONS.ROLEID] This field identifies the Review Assignment with which this question and response are associated.
Alternate Reviewer [ROLEREVU.ALTERNATE] 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.
Manuscript Number [REVIEWER_QUESTIONS.DOCUMENTID] Identifies the submission with which this review is associated
Revision Number [REVIEWER_QUESTIONS.REVISION] Identifies the revision of the manuscript with which this review is associated
Date Reviewer Invited [REVIEWER_QUESTIONS.RSTART] The date on which the reviewer was invited to submit the review with which this question and response are associated
Date Invitation Accepted [REVIEWER_QUESTIONS.ACCEPTDATE] The date on which the reviewer agreed to submit the review with which this question and response are associated

Date Review Due **[REVIEWER_QUESTIONS.DUEDATE]** The date on which the review with which this question and response are associated is/was due
Date Review Submitted **[REVIEWER_QUESTIONS.RSTOP]** The date on which the review with which this question and response are associated was submitted
Reviewer Comments to Author **[REVIEWER_QUESTIONS.AUTHORCOMMENT]** The text of the 'Reviewer Blind Comments to Author' for the review with which this question and response are associated
Reviewer Comments to Editor **[REVIEWER_QUESTIONS.EDITORCOMMENT]** The text of the 'Reviewer Confidential Comments to Editor' for the review with which this question and response are associated
Custom Question Instructions **[REVIEWER_QUESTIONS.INSTRUCTION]** 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
Reviewer's Response **[REVIEWER_QUESTIONS.Answers]** 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
Custom Question Response Type **[REVIEWER_QUESTIONS.DATA_TYPE]** The type of response required for this question (e.g. date, scrolling selector, text) **Hints:** If the response type was a list, reference the Custom Question List Type field to determine what kind of list was offered.
Reviewer Number **[ROLEREVU.RANK]** 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.
Reviewer Recommendation **[REVIEWER_QUESTIONS.RRESULT]** The Recommendation term that the Reviewer chose for the review with which this question and response are associated.
Manuscript Rating **[REVIEWER_QUESTIONS.DOCRATE]** The Overall Manuscript Rating entered by the Reviewer for the review with which this question and response are associated
Custom Question Text **[REVIEWER_QUESTIONS.TEXT]** The text of the question as presented to the Reviewer at the time of the review
Custom Question List Type **[REVIEWER_QUESTIONS.LIST_TYPE]** When a custom question uses a list type response, this identifies what kind of list is used.
Use Default Value **[REVIEWER_QUESTIONS.USE_DEFAULT_VALUE]** Indicates whether a default response was configured to be used for this question at the time of review **Hints:** To find the actual default value, see the "Default Value" field
Min/Max Response Constraint Setting **[REVIEWER_QUESTION_DEFINITIONS.MIN_MAX_FLAGS]** 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,

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.

File Inventory for Manuscript Number: DEMO-D-04-00095, DOI: Unassigned
Kevin M. Carlson (UNITED STATES): "Migratory Flight Patterns: Canada Geese and Later Seasonal Disorders"

Listed below are the files included in the current version of the latest Revision of the submission. Click the Download link to download the individual source file. To download a zip file containing multiple items, select the items using the check boxes, and then click the 'Download Zip File' button. The 'Check All' and 'Clear All' links may be used to select or unselect all the files. Additional software (such as WinZip) must be installed on your computer in order to unzip (uncompress) the zip file. View Submission

You may also use CrossCheck to run similarity checks on the source file(s).(more...)

If a checkbox does not appear in the 'Select' column for a file, the file is no longer available. Click the Download link in the Action column for more information about the file.

Close Save and Close

Upload Companion File

Check All Clear All

Submission Files (accessed via PDF)

Select	Action	Item	Description	Item Family	File Name	Size	Last Modified	QC Results	Display On Transmittal Form
☐	Download	Manuscript	* Manuscript	Document	Manuscript.txt	11.8 KB	Jun 12 2001 8:47AM	Tested	
☐	Download	Figure	Figure	Figure	latex.tex	20.2 KB	Sep 19 2001 9:54AM		✓
☐	Download	Figure	Figure1	Figure	ALPaper.tex	40 KB	Nov 19 2003 4:46PM		✓
☐	Download	Figure	Figure2	Figure	CLASSFAM.TEX	28.1 KB	Nov 19 2003 4:46PM		✓
☐	Download	Figure	Figure3	Figure	cone-paper.tex	23.8 KB	Nov 19 2003 4:46PM		✓
☐	Download	Figure	Figure4	Figure	roche.tex	28.9 KB	Nov 19 2003 4:47PM		✓
☐	Download	Figure	Figure5	Figure	sample.tex	30.6 KB	Nov 19 2003 4:47PM		✓
☐	Download	Figure	Figure6	Figure	voyatzis.tex	54.3 KB	Nov 19 2003 4:47PM		✓

Check All Clear All

Close Save and Close

CrossCheck

Upload Companion File

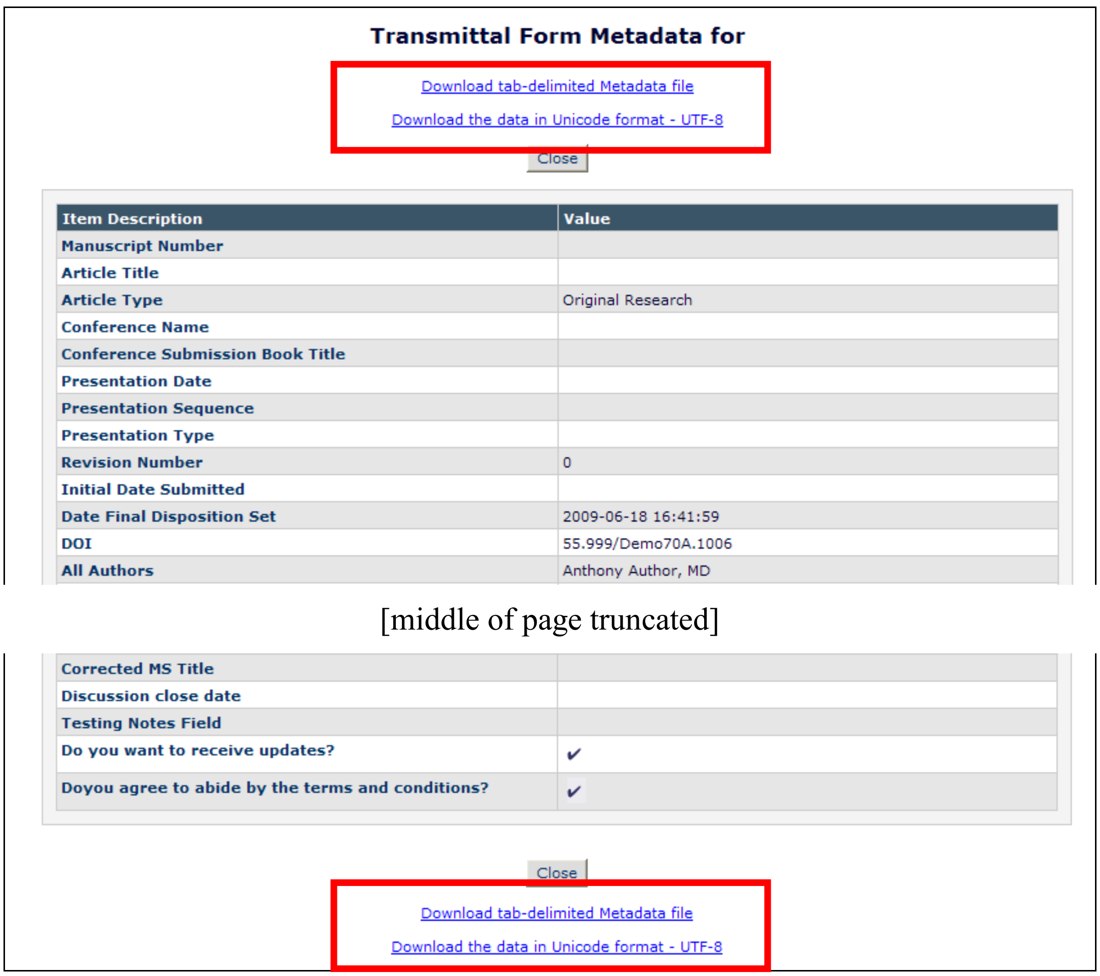
Download Zip File

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.


Transmittal Form Metadata for

Download tab-delimited Metadata file

Download the data in Unicode format - UTF-8

Close

Item Description	Value
Manuscript Number	
Article Title	
Article Type	Original Research
Conference Name	
Conference Submission Book Title	
Presentation Date	
Presentation Sequence	
Presentation Type	
Revision Number	0
Initial Date Submitted	
Date Final Disposition Set	2009-06-18 16:41:59
DOI	55.999/Demo70A.1006
All Authors	Anthony Author, MD

[middle of page truncated]

Corrected MS Title	
Discussion close date	
Testing Notes Field	
Do you want to receive updates?	✔
Doyou agree to abide by the terms and conditions?	✔

Close

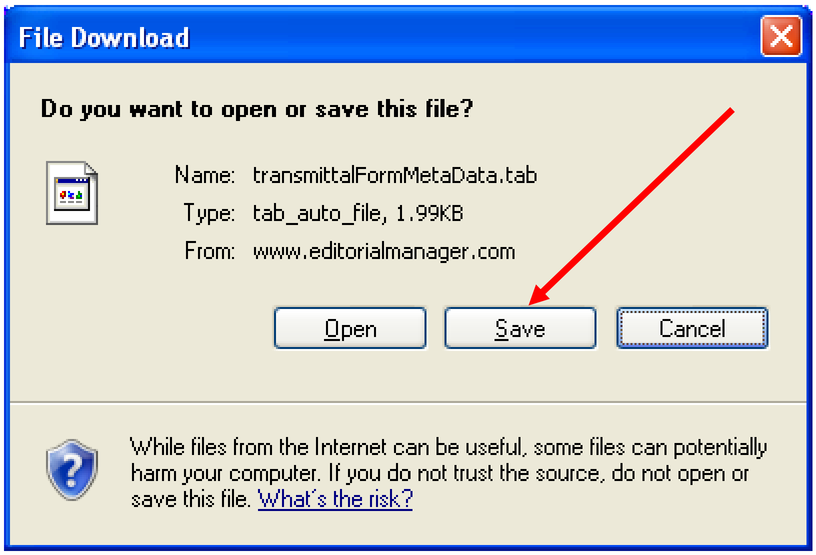
Download tab-delimited Metadata file

Download the data in Unicode format - UTF-8

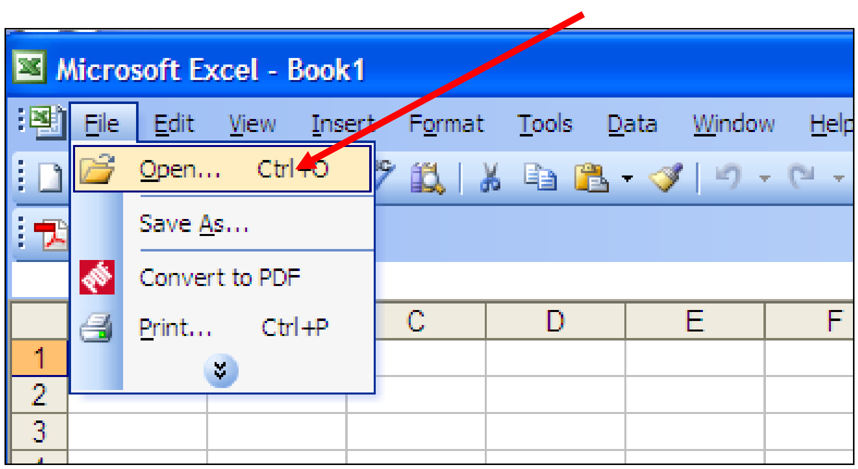
NOTE: To open the file in Excel, Excel's File Open menu must be used, followed by selecting 'tab' as the delimiter for the file. Do not double click the file to automatically open the Excel application. Opening the file by double clicking may result in the Unicode characters not displaying properly.

Procedure for Excel 2003:

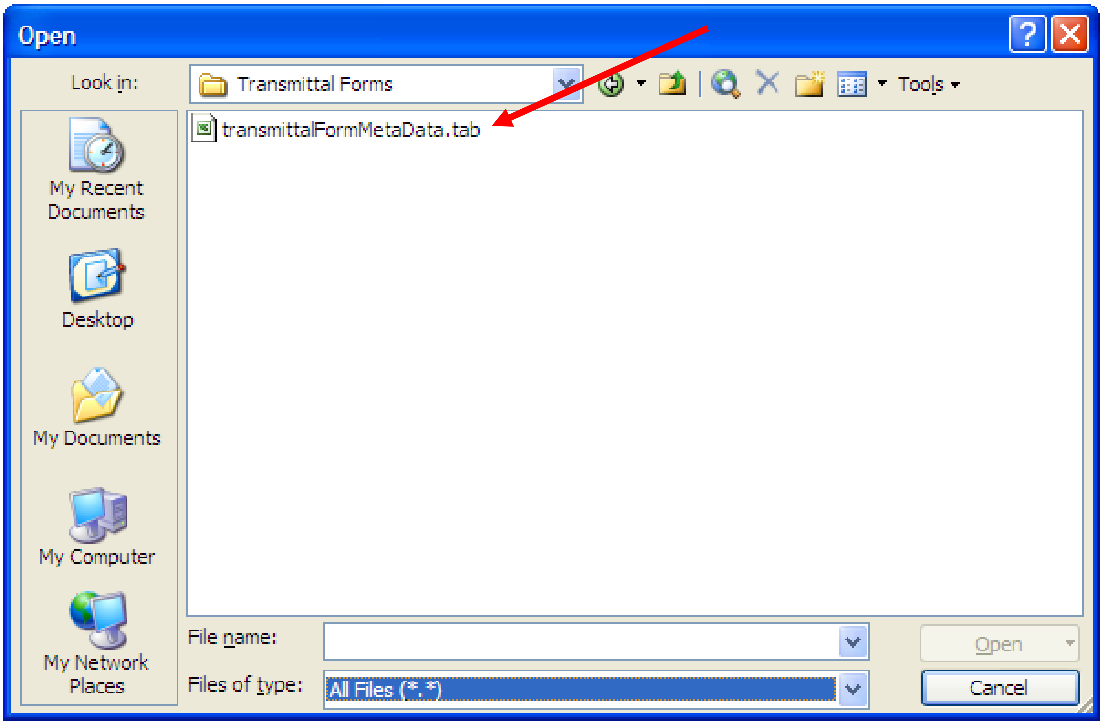
1. In Editorial Manager, after clicking ‘Download the data file in Unicode format – UTF-8’, click the ‘Save’ button in the browser dialog box once the file has been prepared, and make a note of where you save the file. NOTE: The appearance of this dialog box depends on the browser.



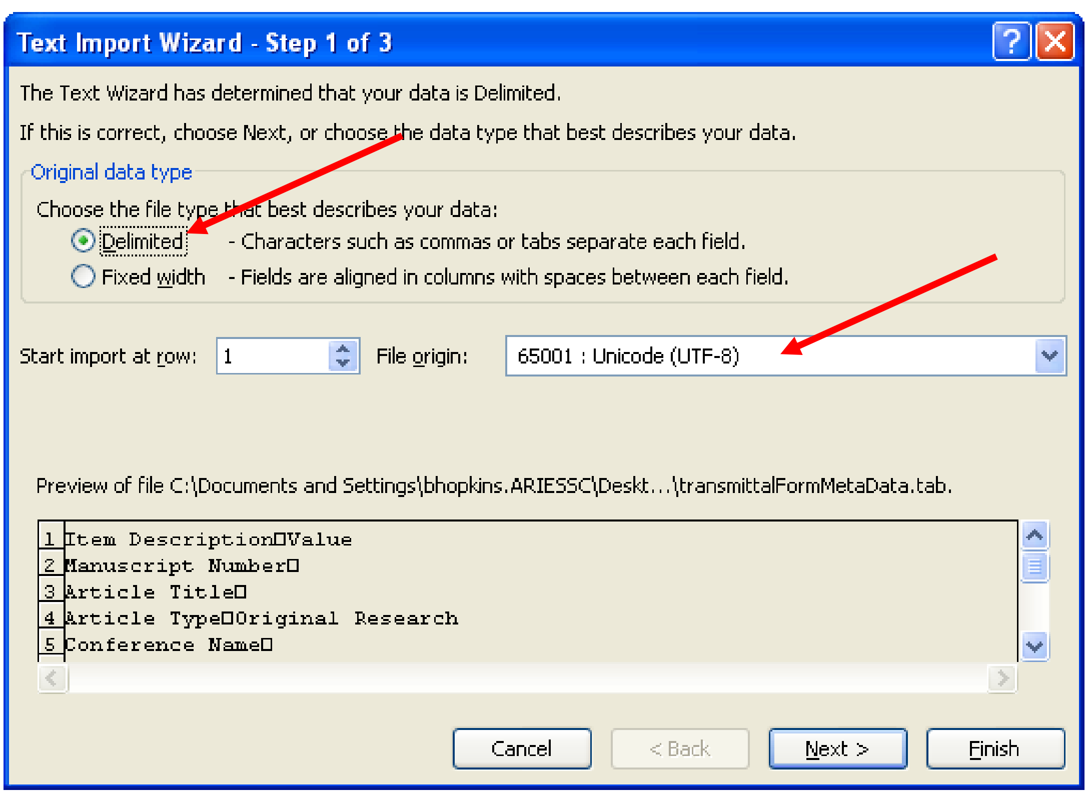
2. Open the Excel application.
3. Click ‘File’, then ‘Open’ from the Excel 2003 menu, or the ‘File Open’ icon:



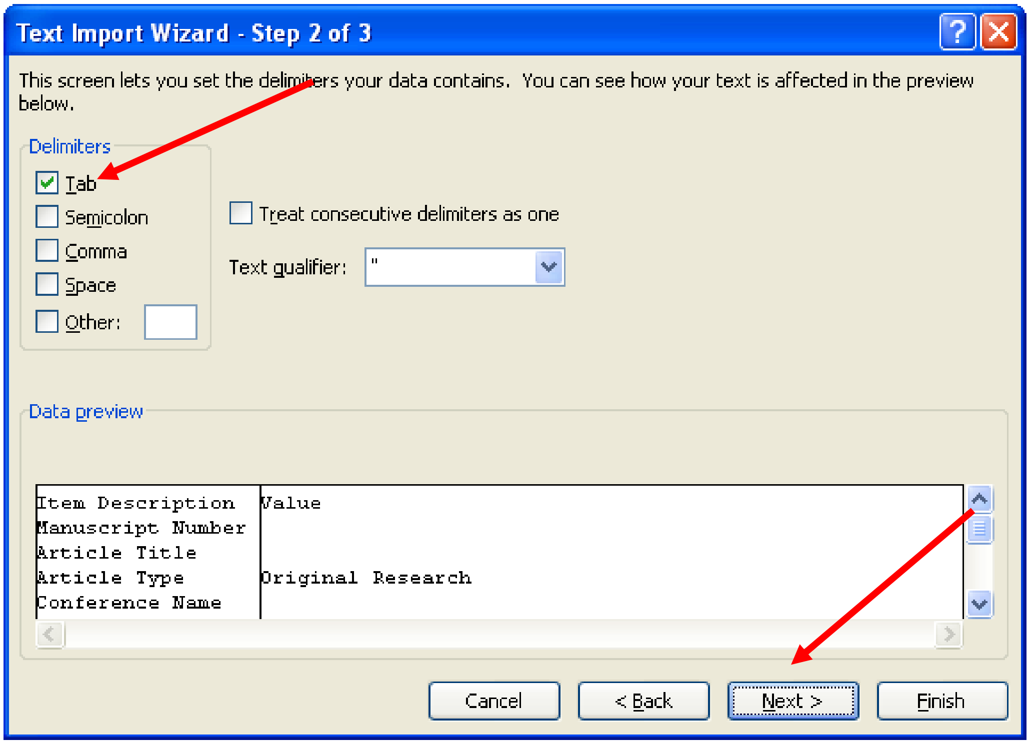
4. Browse to the file (where you just saved it), and click to open it.



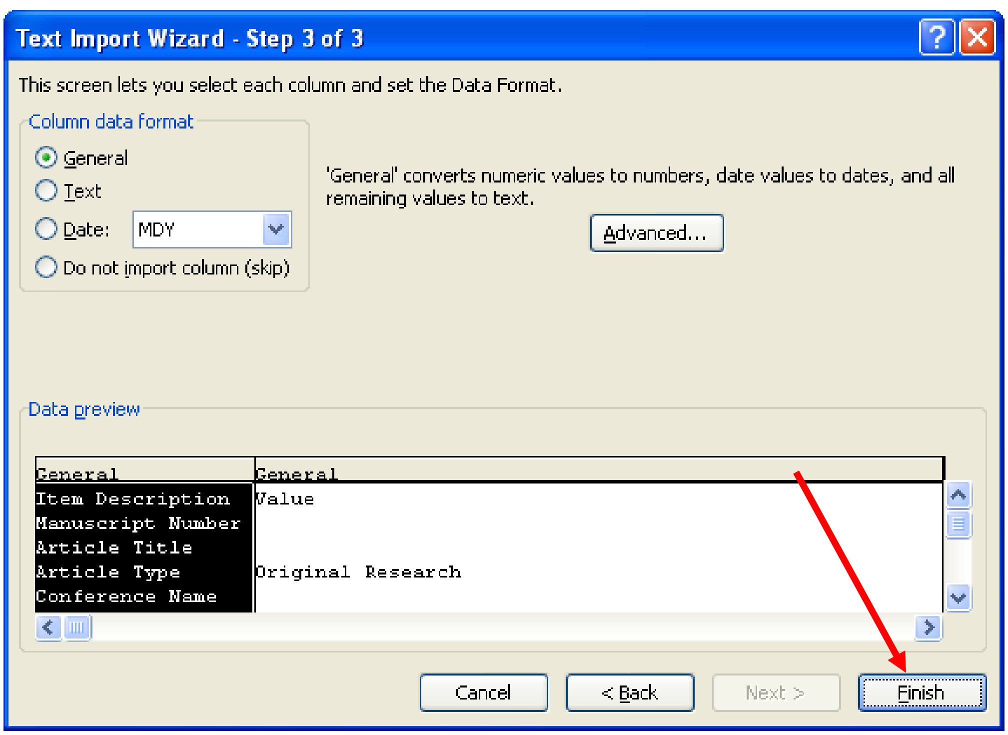
5. The text import wizard should appear in Excel. Choose 'Delimited'. Note that the 'File Origin' reflects UTF-8.



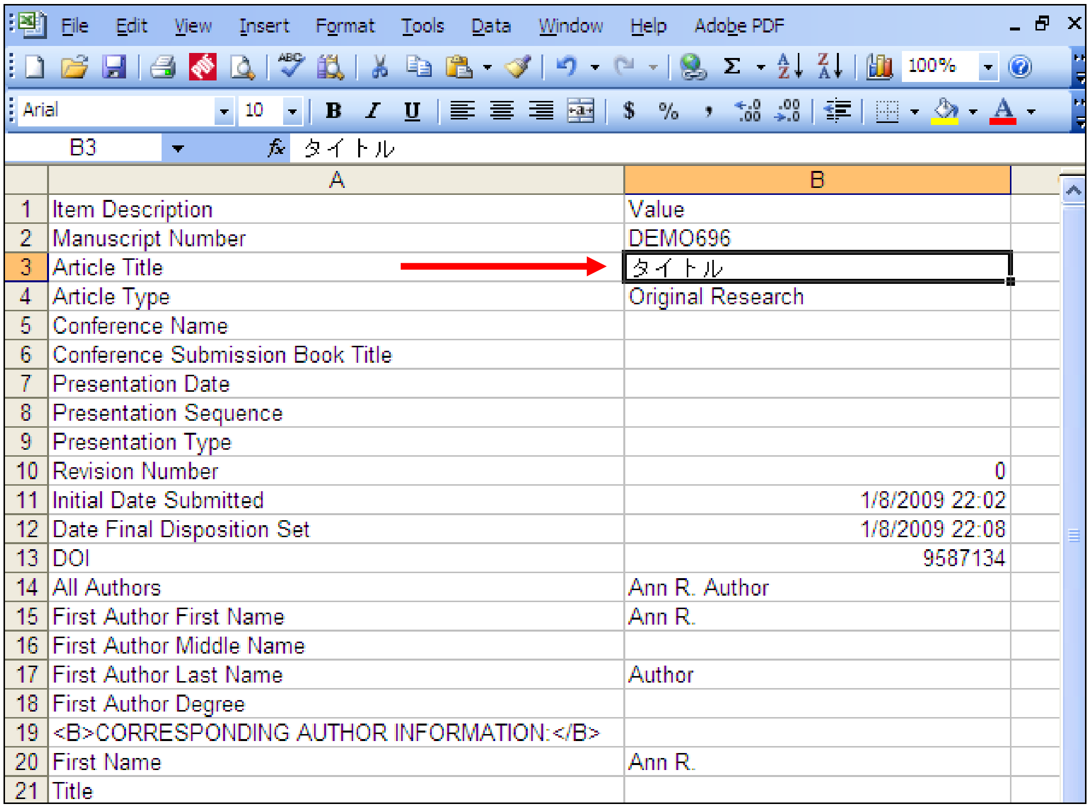
6. In Step 2 of the Text Import Wizard, select ‘Tab’, then click the ‘Next’ button.



7. In Step 3 of the Text Import Wizard, click the ‘Finish’ button.



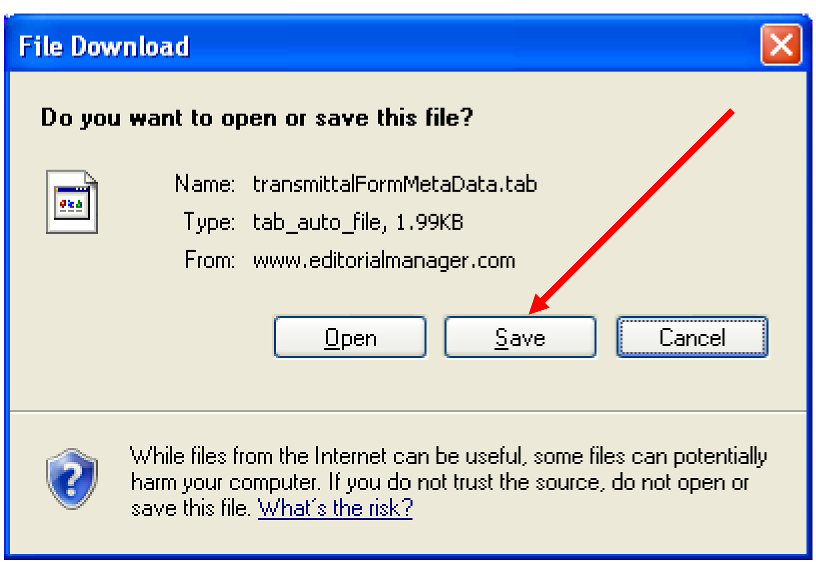
8. The Unicode characters should now display appropriately:



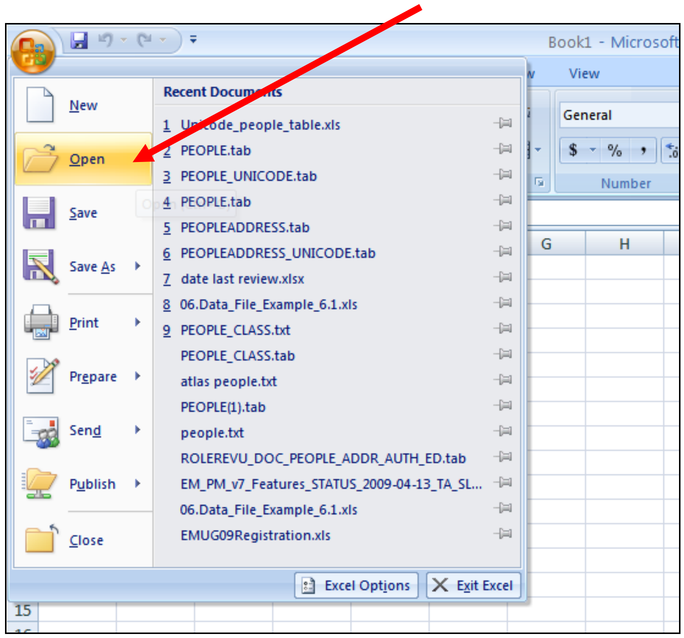
	A	B
1	Item Description	Value
2	Manuscript Number	DEMO696
3	Article Title	タイトル
4	Article Type	Original Research
5	Conference Name	
6	Conference Submission Book Title	
7	Presentation Date	
8	Presentation Sequence	
9	Presentation Type	
10	Revision Number	0
11	Initial Date Submitted	1/8/2009 22:02
12	Date Final Disposition Set	1/8/2009 22:08
13	DOI	9587134
14	All Authors	Ann R. Author
15	First Author First Name	Ann R.
16	First Author Middle Name	
17	First Author Last Name	Author
18	First Author Degree	
19	<B>CORRESPONDING AUTHOR INFORMATION:</B>	
20	First Name	Ann R.
21	Title	

Procedure for Excel 2007:

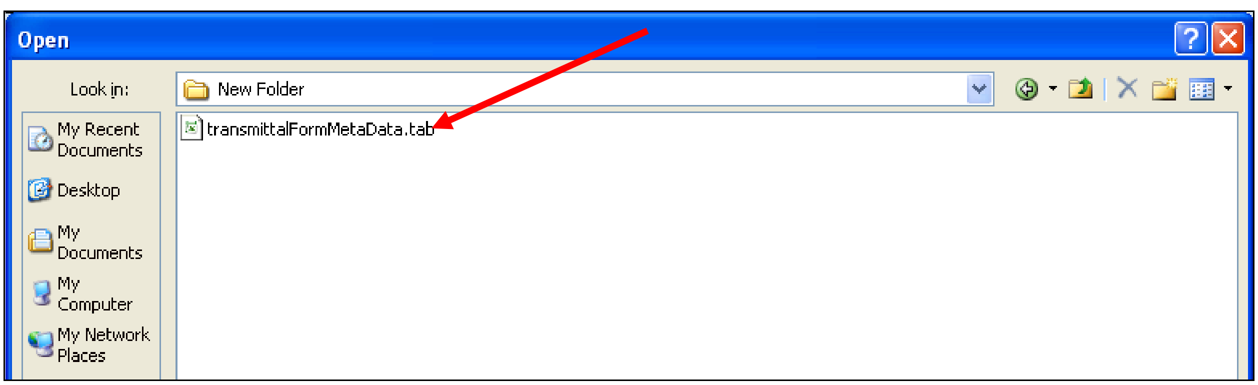
1. In Editorial Manager, after clicking 'Download the data file in Unicode format – UTF-8', click the 'Save' button in the browser dialog box once the file has been prepared, and make a note of where you save the file. NOTE: The appearance of this dialog box depends on the browser.



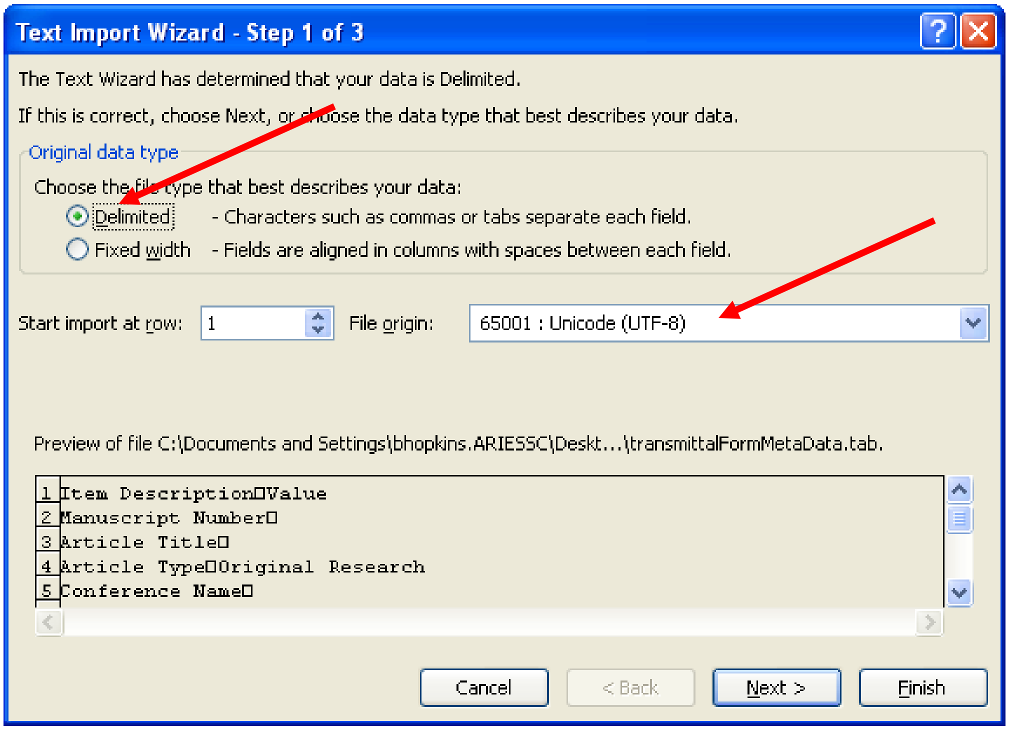
2. Open the Excel 2007 application.
3. Click the ‘Office Button’ in the upper left corner, then ‘Open’ from the Excel 2007 menu, or the ‘Open’ icon in the Quick Access Toolbar (if configured):



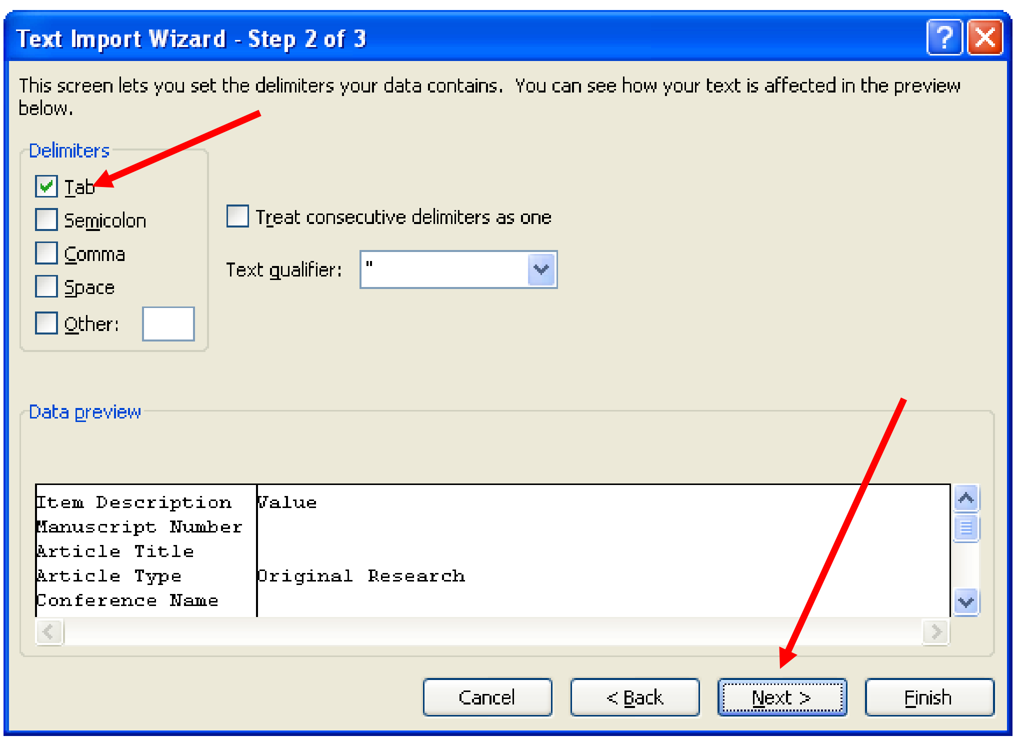
4. Browse to the file (where you just saved it), and open it.



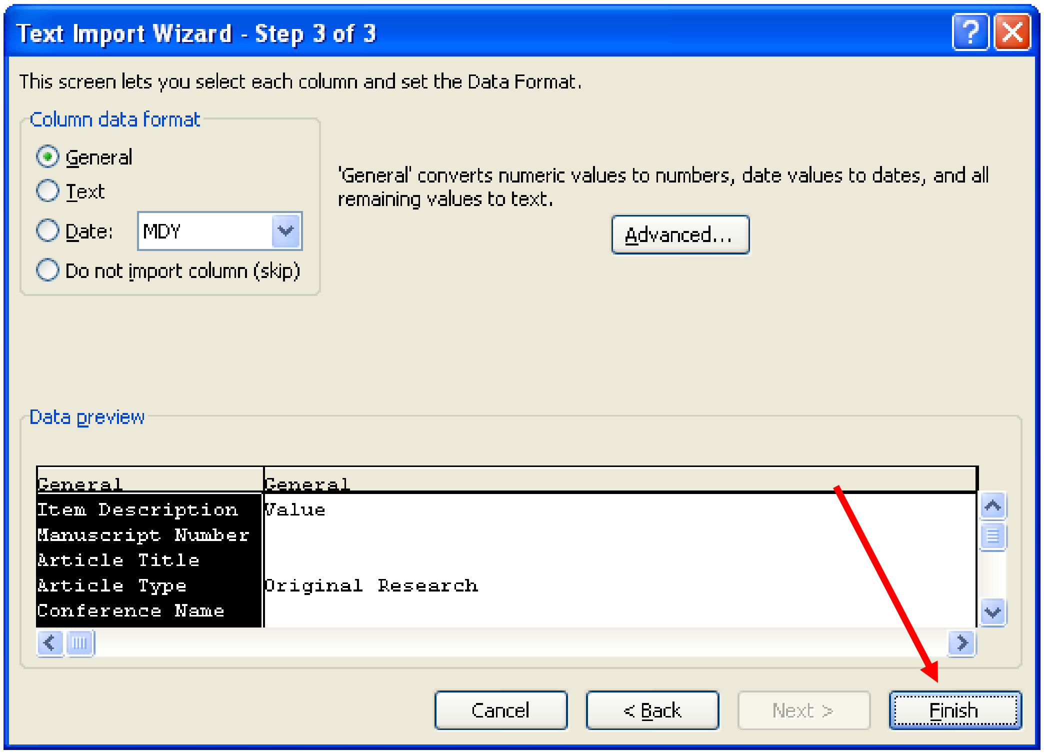
5. The text import wizard should appear in Excel. Choose ‘Delimited’. Note that the ‘File Origin’ reflects UTF-8.



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:

	A	B
1	Item Description	Value
2	Manuscript Number	DEMO696
3	Article Title	タイトル
4	Article Type	Original Research
5	Conference Name	
6	Conference Submission Book Title	
7	Presentation Date	
8	Presentation Sequence	
9	Presentation Type	
10	Revision Number	0
11	Initial Date Submitted	1/8/2009 22:02
12	Date Final Disposition Set	1/8/2009 22:08
13	DOI	9587134
14	All Authors	Ann R. Author
15	First Author First Name	Ann R.
16	First Author Middle Name	
17	First Author Last Name	Author
18	First Author Degree	
19	<B>CORRESPONDING AUTHOR INFORMATION:</B>	
20	First Name	Ann R.

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

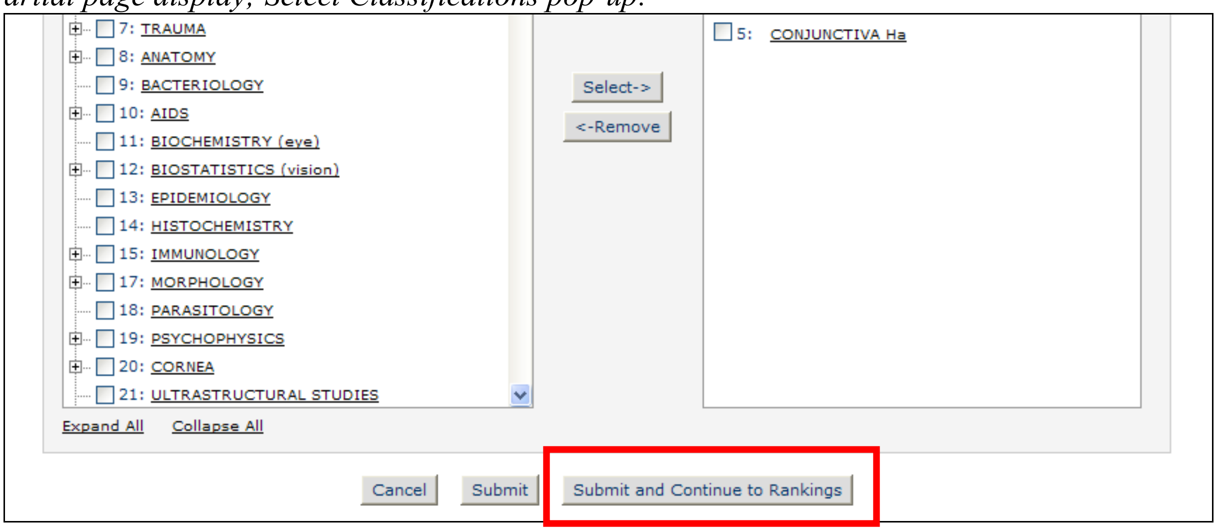
EM v8.1 introduces a new Personal Classification Ranking feature which allows and/or requires users to specify their levels of personal expertise for each selected Personal Classification (i.e. indicate the subject areas in which they are most knowledgeable and/or interested). Ranking information can 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:

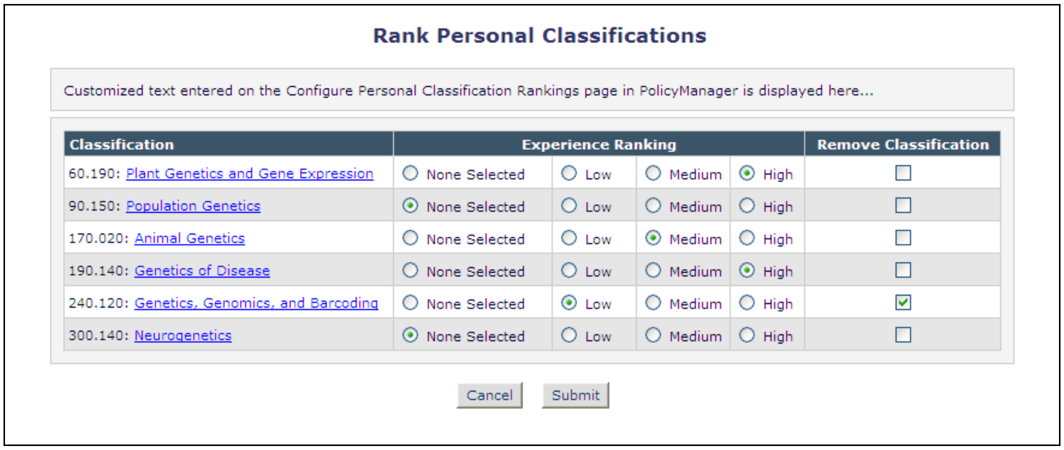
1. *Registration Page*
2. *Search People – Update Information*
3. *Update My Information* (also displayed for first login following proxy registration)
4. *Update Classifications and Keywords* (deep link target page)

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.



Rank Personal Classifications

Customized text entered on the Configure Personal Classification Rankings page in PolicyManager is displayed here...

Classification	Experience Ranking				Remove Classification
60.190: Plant Genetics and Gene Expression	None Selected	Low	Medium	(•) High	☐
90.150: Population Genetics	(•) None Selected	Low	Medium	High	☐
170.020: Animal Genetics	None Selected	Low	(•) Medium	High	☐
190.140: Genetics of Disease	None Selected	Low	Medium	(•) High	☐
240.120: Genetics, Genomics, and Barcoding	None Selected	(•) Low	Medium	High	☑
300.140: Neurogenetics	(•) None Selected	Low	Medium	High	☐

Cancel Submit

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:

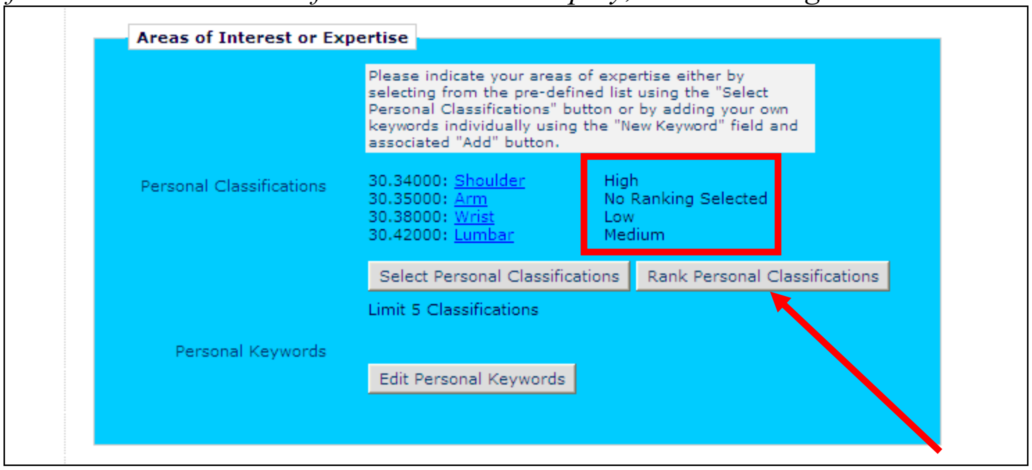
1. *Registration Page*
2. *Search People – Update Information* page
3. *Update My Information* page
4. *Update Classifications and Keywords* deep link target page

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:

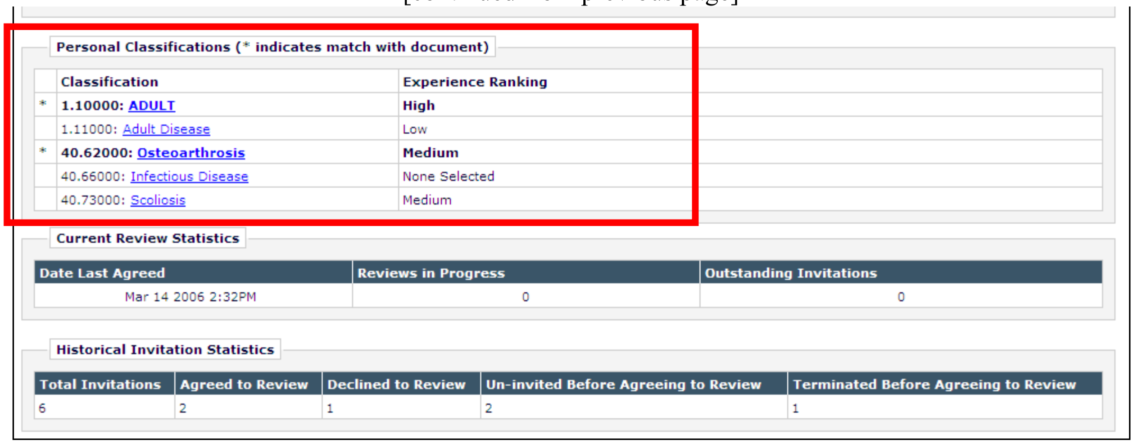
Sample of 'Rank Personal Classifications' button display, some Rankings selected:



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]

[continued from previous page]



Personal Classifications (* indicates match with document)

	Classification	Experience Ranking
*	**1.10000: ADULT**	**High**
	1.11000: Adult Disease	Low
*	**40.62000: Osteoarthrosis**	**Medium**
	40.66000: Infectious Disease	None Selected
	40.73000: Scoliosis	Medium

Current Review Statistics

Date Last Agreed	Reviews in Progress	Outstanding Invitations
Mar 14 2006 2:32PM	0	0

Historical Invitation Statistics

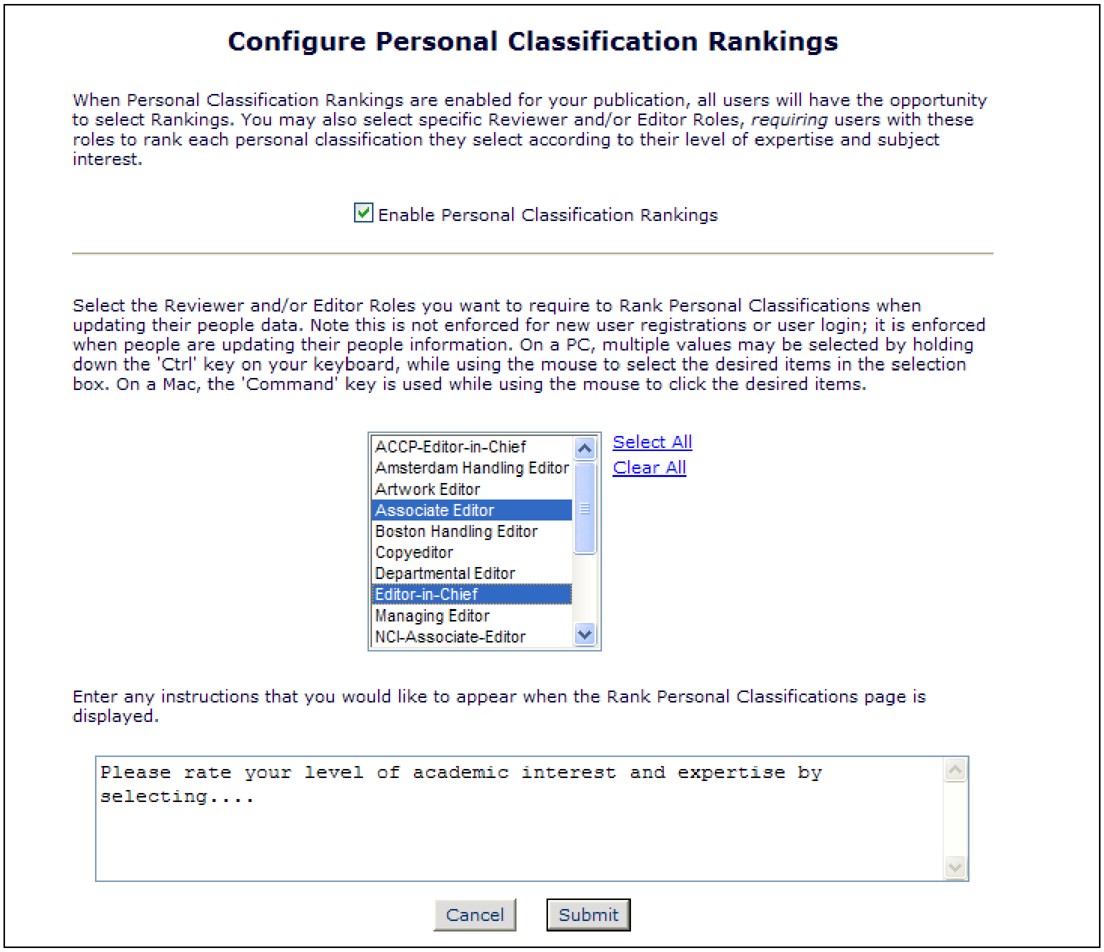
Total Invitations	Agreed to Review	Declined to Review	Un-invited Before Agreeing to Review	Terminated Before Agreeing to Review
6	2	1	2	1

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.
ACCP-Editor-in-Chief
Amsterdam Handling Editor
Artwork Editor
Associate Editor
Boston Handling Editor
Copyeditor
Departmental Editor
Editor-in-Chief
Managing Editor
NCI-Associate-Editor
Select All
Clear All
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:

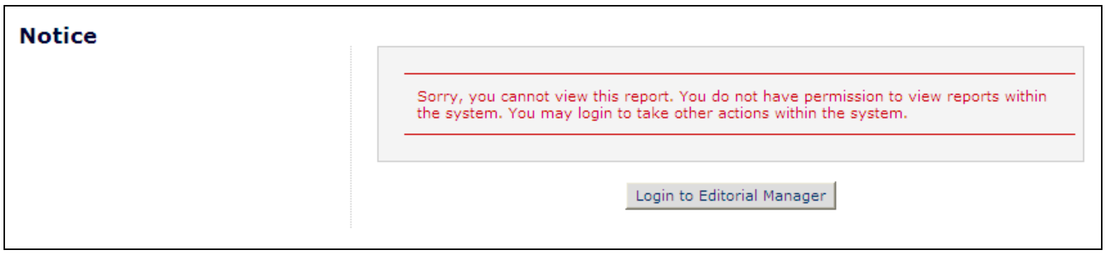
Clicking the ‘E-mail’ icon from the EAR Main Menu, Report Viewer toolbar or Report Designer toolbar brings opens a pop-up window where the logged in user chooses a letter template to start from. The drop-down list displays all letters configured in the new letter family called “Enterprise Analytics Reporting”.

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.

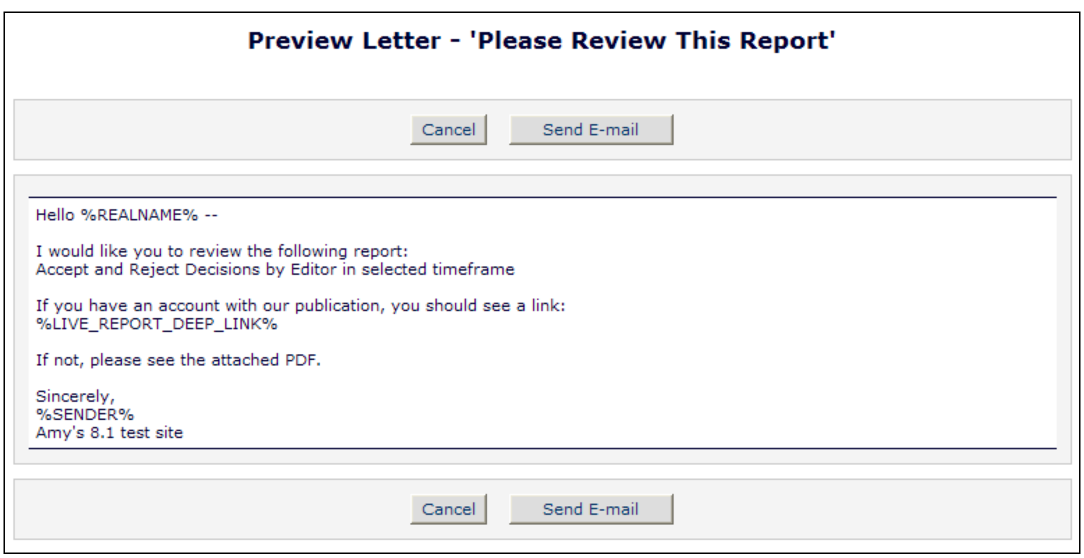
2. **%LIVE_REPORT_DEEP_LINK%** - This merge field populates with a deep link to the report viewer page for the report, running the report when the link is clicked. This link is populated only if the recipient has been selected from the list of Editors and therefore can be identified as an active registered 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:



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.

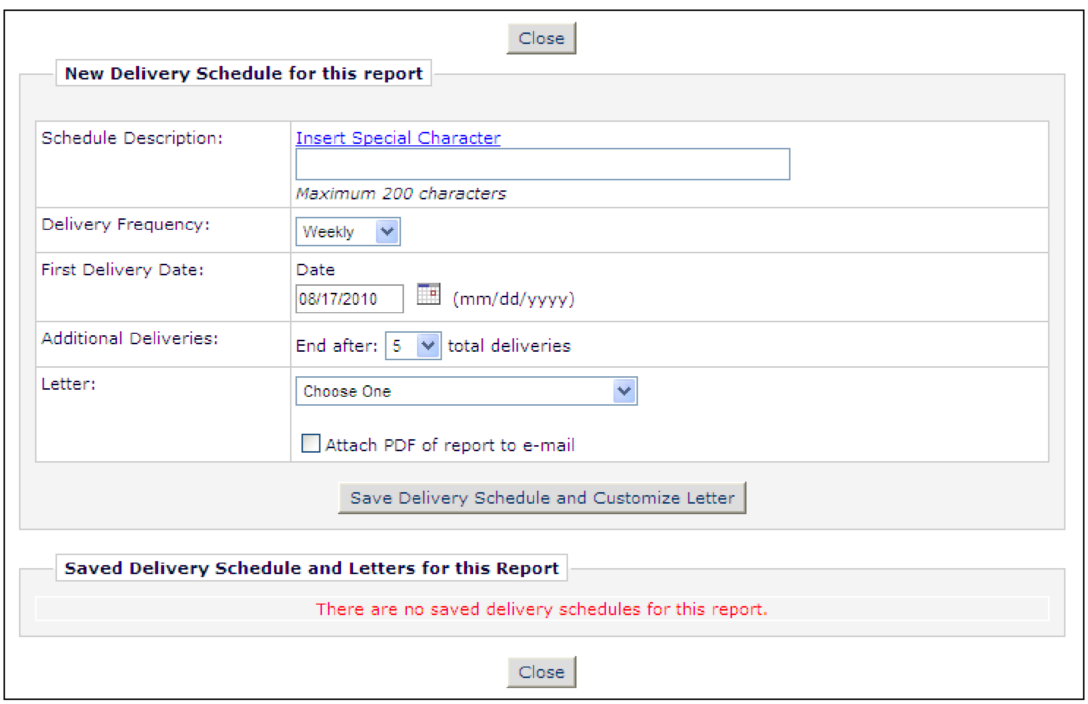
Clicking the ‘Schedule’ icon from the EAR Main Menu, Report Viewer toolbar or Report Designer toolbar brings opens a pop-up window where the logged in user configures delivery schedule for this report.

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).

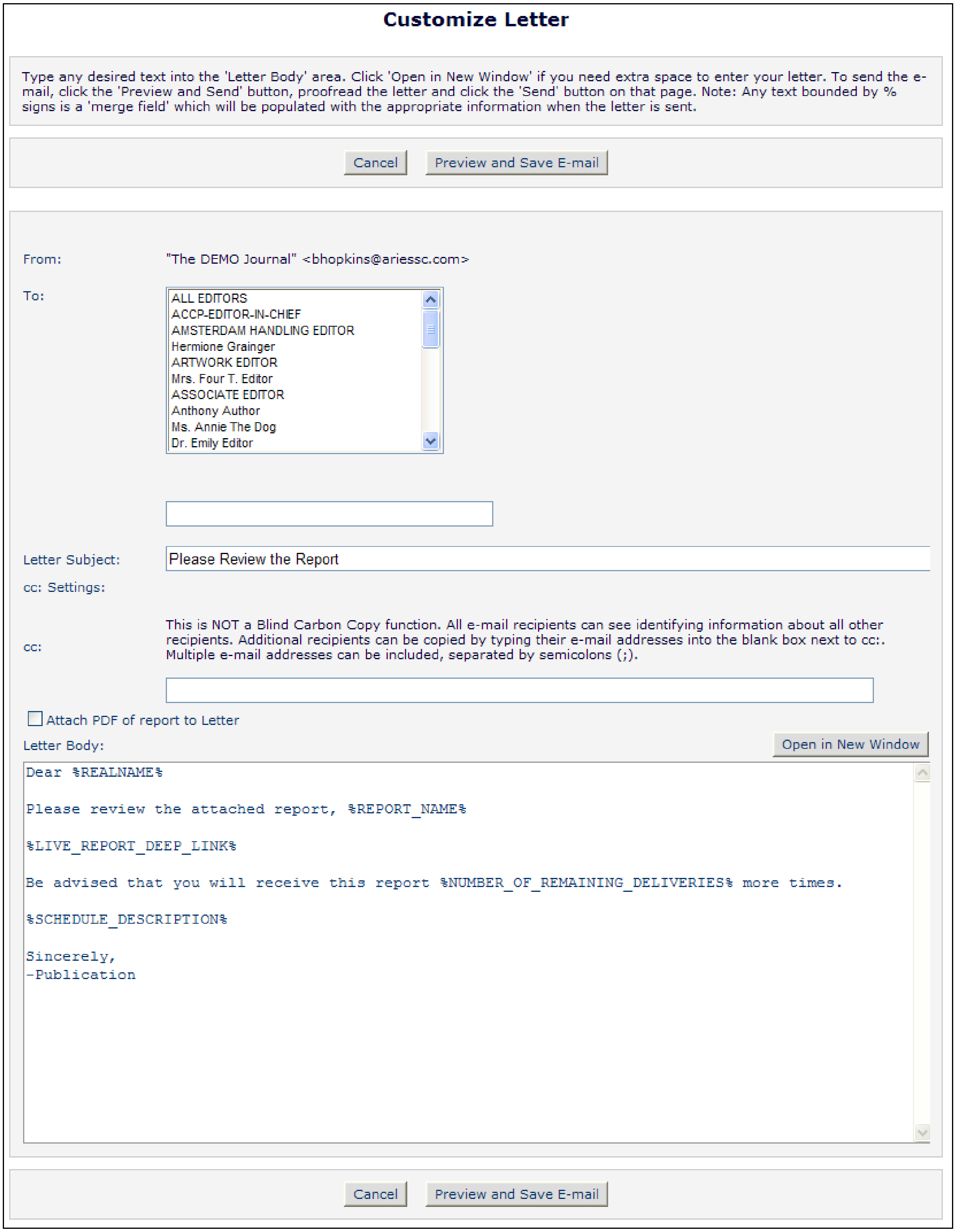
The lower portion of the page is where the user configures the Delivery Schedule. The user enters the following information:

- 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 (28^{th}, 29^{th}, 30^{th}, or 31^{st}).
- 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

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Cancel | Preview and Save E-mail

From: "The DEMO Journal" <bhopkins@ariessc.com>

To:
ALL EDITORS
ACCP-EDITOR-IN-CHIEF
AMSTERDAM HANDLING EDITOR
Hermione Grainger
ARTWORK EDITOR
Mrs. Four T. Editor
ASSOCIATE EDITOR
Anthony Author
Ms. Annie The Dog
Dr. Emily Editor

Letter Subject: Please Review the Report

cc: Settings:

cc: This is NOT a Blind Carbon Copy function. All e-mail recipients can see identifying information about all other recipients. Additional recipients can be copied by typing their e-mail addresses into the blank box next to cc:. Multiple e-mail addresses can be included, separated by semicolons (;).

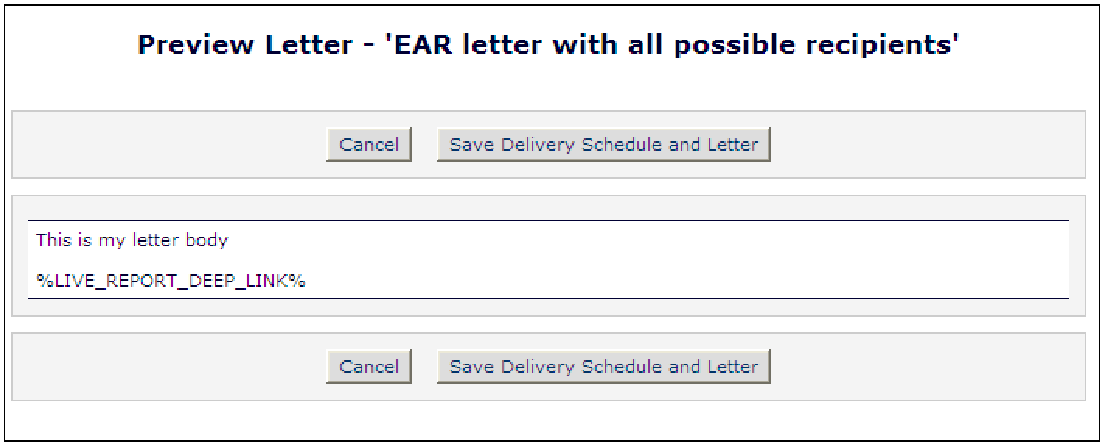
Attach PDF of report to Letter

Letter Body: Open in New Window

```
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
```

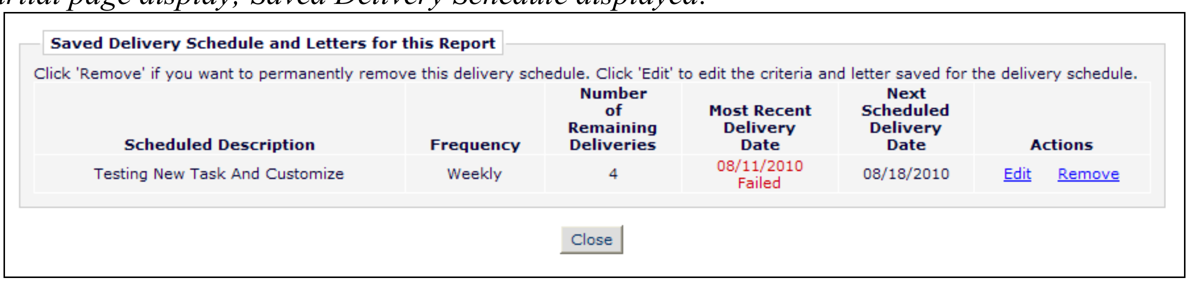
Cancel | Preview and Save E-mail

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:



Saved Delivery Schedule and Letters for this Report

Click 'Remove' if you want to permanently remove this delivery schedule. Click 'Edit' to edit the criteria and letter saved for the delivery schedule.

Scheduled Description	Frequency	Number of Remaining Deliveries	Most Recent Delivery Date	Next Scheduled Delivery Date	Actions
Testing New Task And Customize	Weekly	4	08/11/2010 Failed	08/18/2010	Edit Remove

Close

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.

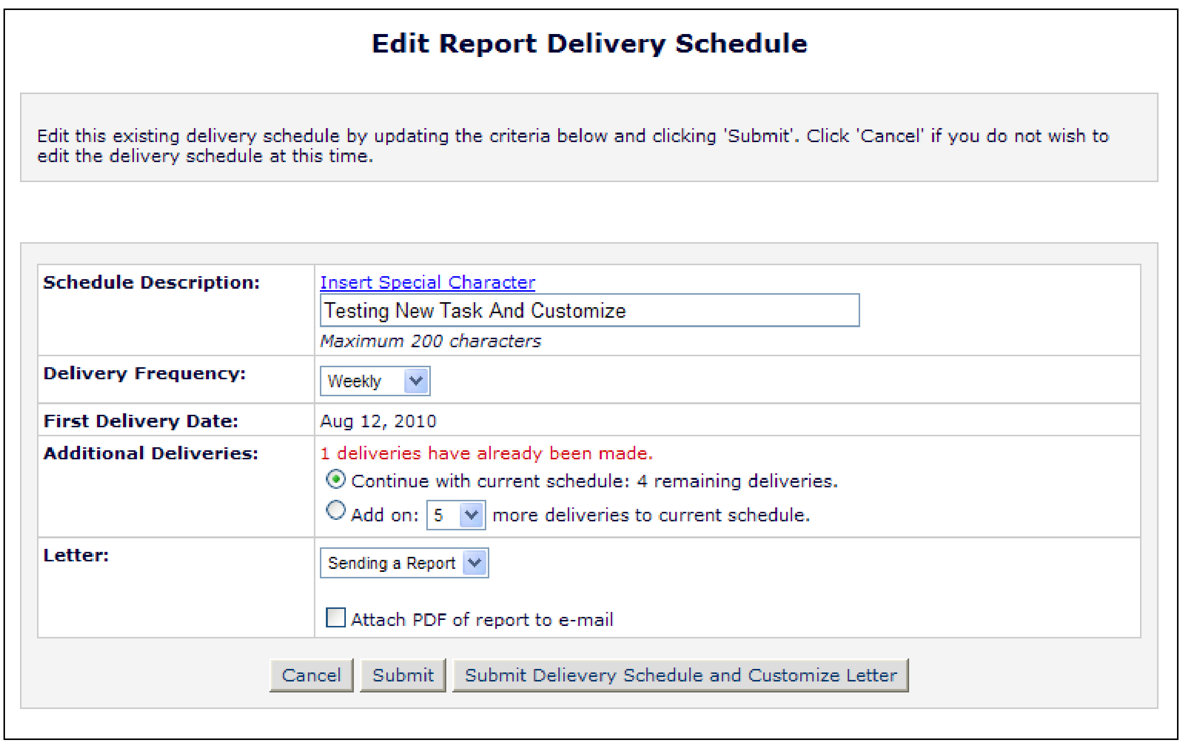
Users with ‘Schedule Reports’ permission may edit existing Scheduled Deliveries at any time. This is done by clicking the ‘Edit’ link next to the selected Schedule on the *Report Delivery Schedule* page. The user may make the following changes:

- 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.

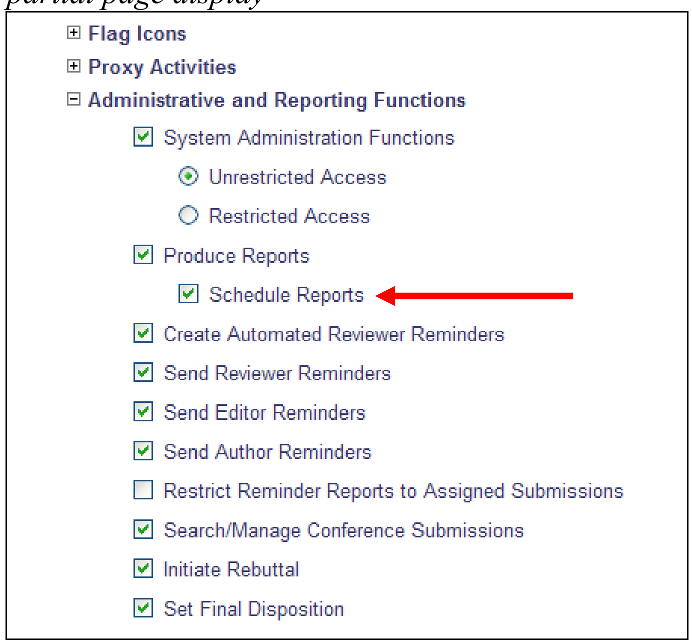


NOTE: Clicking the existing 'Delete' icon next to a report name on the EAR Main Menu brings up a warning to the user if there are one or more saved delivery schedules associated with the report.

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.

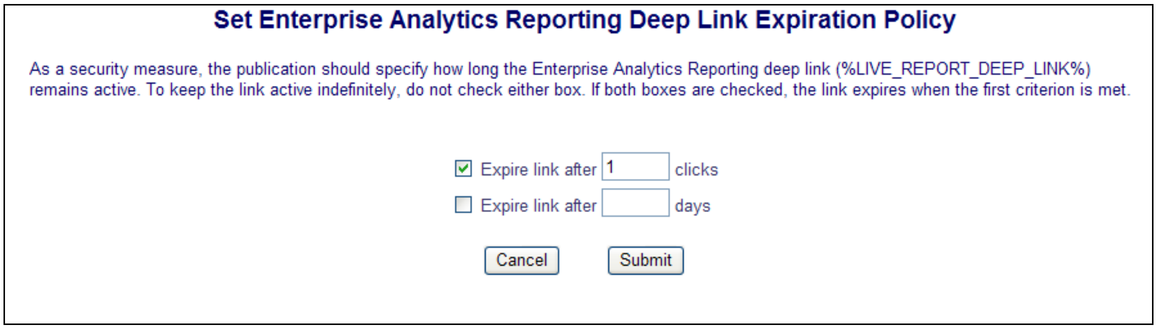
- Recipient – There are three options for Recipient available for selection:
    - Display text box so sender can insert an e-mail address – adds a blank text box on the Customize page
    - Display the following e-mail address for the recipient: followed by a text box – allows the administrator to enter one or more e-mail addresses to receive the letter whenever it is sent
    - 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:
    - 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
    - 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’.


Set Enterprise Analytics Reporting Deep Link Expiration Policy

As a security measure, the publication should specify how long the Enterprise Analytics Reporting deep link (%LIVE_REPORT_DEEP_LINK%) remains active. To keep the link active indefinitely, do not check either box. If both boxes are checked, the link expires when the first criterion is met.

- [x] Expire link after 1 clicks
- [ ] Expire link after days

Cancel Submit

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 makes 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 <u>Fees Requiring Action Report</u> 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 <u>all</u> 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.

Fees Requiring Action Report:

Fees Requiring Action Report

This report displays submissions with fees where the Author has ignored the request for payment and has not yet selected a payment method. This report also includes submissions with fees where the Author selected 'Credit Card' as the payment method, but did not successfully complete the credit card transaction. To get a list of all Fees Requiring Action, simply click the 'Run Report' button. If you wish to refine the result set, you may specify Optional Criteria and click the 'Submit' button.

Run Report

Optional Criteria

You may refine your result set with the criteria below.

Fee Type:	All Fee Types
Fee Tracking ID:	
Manuscript Number (contains):	☐ Show submissions with no manuscript number assigned
Article Title (contains):	
Author Last Name (contains):	
Fee Creation Date:	from ___ to ___ (mm/dd/yyyy)
Invoice Sent:	◉ All ○ Invoice has been sent ○ Invoice has not been sent
Check Payment Information Flag:	☐ Show payment records with the 'Check Payment Information' flag turned on

Sort Preferences

☐ First ORDER BY Fee Creation Date in ASCENDING order.

☐ Then ORDER BY Fee Creation Date in ASCENDING order.

Cancel Submit

The results page looks very similar to other CM reports. Relevant data items and action links are displayed.

Fees Requiring Action Report

This report was run September 03, 2010

Content: This report includes all fees where the Author has not yet selected a Payment Method that satisfies your selection criteria. This report also includes submissions with fees where the Author selected 'Credit Card' as the payment method, but did not successfully complete the credit card transaction.

Download the report results

Page: 1 of 1 (8 total payment record) Display 10 results per page.

Action	Fee Tracking ID	Manuscript Number	Article Title	Author Name	Editorial Status	Fee Creation Date	Fee Description	Payment Status	Invoice Sent	Fee Amount	Currency Code
Fees and Payments Fee History Details Production Details Send Fee Email	EM-STACEYTEST81-10		Pre-demo PayPal test	Stacey Lavelle	Submitted to Journal	Jul 30, 2009	Society Member Discount	Payment Due	✓	50.00	USD
Fees and Payments Fee History Details Production Details Send Fee Email	EM-STACEYTEST81-15	JBJS-D-03-01209	Primary Intermedullary Locked Nailing in Open fractures of Tibia.	Vineet Jain, MS	Accept	Jul 30, 2009	Publication Charge	Payment Due		100.00	GBP
Fees and Payments Fee History Details Production Details Send Fee Email	EM-STACEYTEST81-26	STACEYTEST73-D-09-00007	PM demo - Request waiver2	Stacey Lavelle	Received by Editor	Aug 20, 2009	New Fee	Payment Due		13.00	CAD
Fees and Payments Fee History Details Production Details Send Fee Email	EM-STACEYTEST81-28	STACEYTEST73-D-09-00003	Testing New Amex Gift Card	Stacey Lavelle	Editor Invited	Aug 21, 2009	Society Member Discount	Payment Due	✓	0.50	USD
Fees and Payments Fee History Details Production Details Send Fee Email	EM-STACEYTEST81-31		PM demo - flat fee	Stacey Lavelle	Needs Approval	Sep 11, 2009	Society Member Discount	Payment Due		0.50	USD
Fees and Payments Fee History Details Production Details Send Fee Email	EM-STACEYTEST81-32	JBJS-D-02-00011	An Uncommon Complication of an Injury to the Shoulder	Robert Poss, M.D.	Completed	Sep 14, 2009	Page Charge	Payment Due		320.00	USD

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

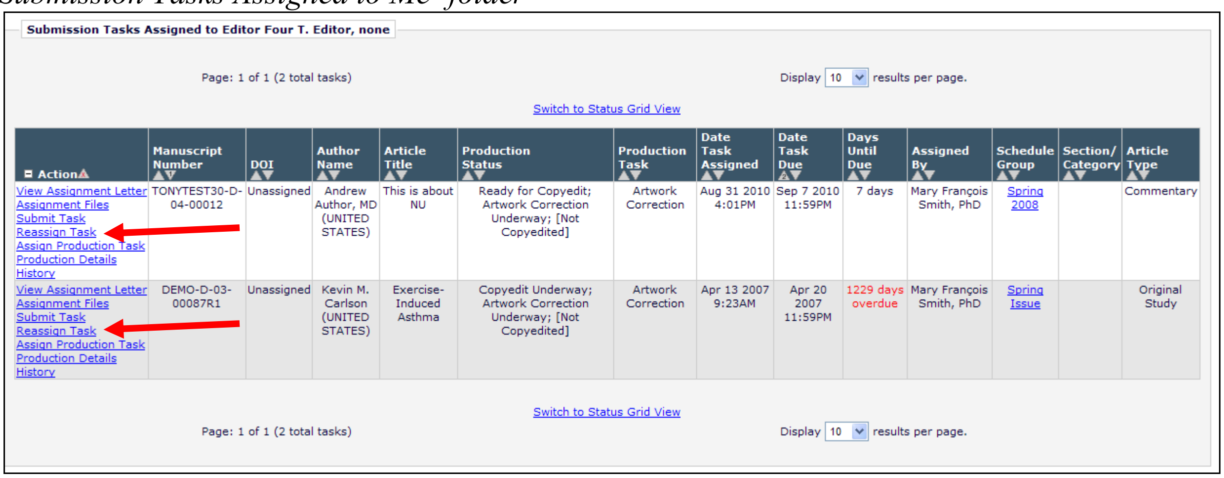
In PM v8.0, there are times when a production task is assigned to a recipient and that recipient is unable to complete the task assignment. In those situations, the task must be cancelled by the assignor and a second task assignment must be created from scratch.

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



Submission Tasks Assigned to Editor Four T. Editor, none

Page: 1 of 1 (2 total tasks) Display 10 results per page.

Switch to Status Grid View

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Production Task	Date Task Assigned	Date Task Due	Days Until Due	Assigned By	Schedule Group	Section/ Category	Article Type
View Assignment Letter Assignment Files Submit Task Reassign Task Assign Production Task Production Details History	TONYTEST30-D-04-00012	Unassigned	Andrew Author, MD (UNITED STATES)	This is about NU	Ready for Copyedit; Artwork Correction Underway; [Not Copyedited]	Artwork Correction	Aug 31 2010 4:01PM	Sep 7 2010 11:59PM	7 days	Mary François Smith, PhD	Spring 2008		Commentary
View Assignment Letter Assignment Files Submit Task Reassign Task Assign Production Task Production Details History	DEMO-D-03-00087R1	Unassigned	Kevin M. Carlson (UNITED STATES)	Exercise-Induced Asthma	Copyedit Underway; Artwork Correction Underway; [Not Copyedited]	Artwork Correction	Apr 13 2007 9:23AM	Apr 20 2007 11:59PM	1229 days overdue	Mary François Smith, PhD	Spring Issue		Original Study

Switch to Status Grid View

Page: 1 of 1 (2 total tasks) Display 10 results per page.

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

Insert Special Character

New Production Task Name: Artwork Correction

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: Insert Special Character

```
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).

- Artwork Editor
- Copyeditor
- Managing Editor
- Compositor
- Production Team

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

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

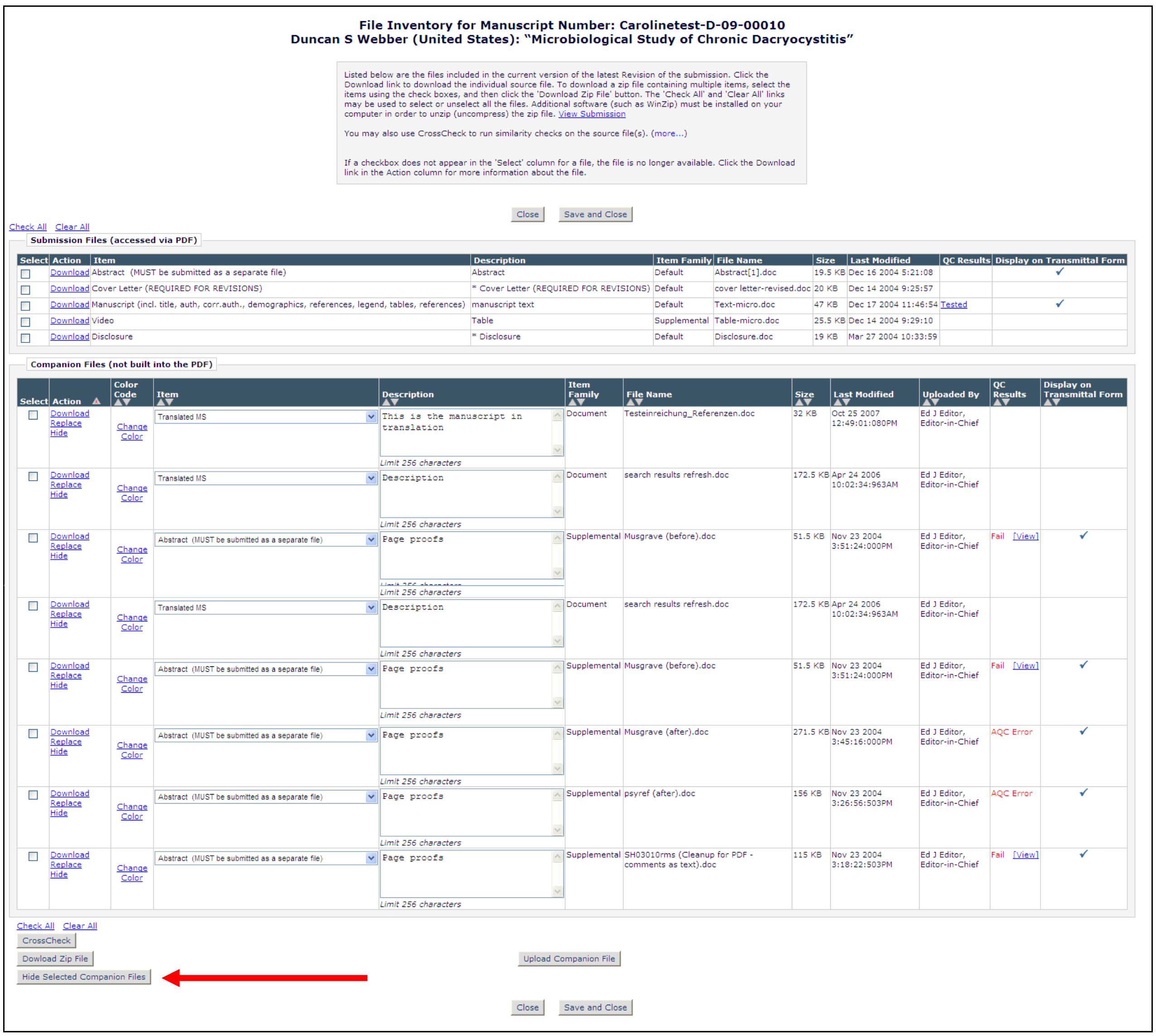
FTP Options

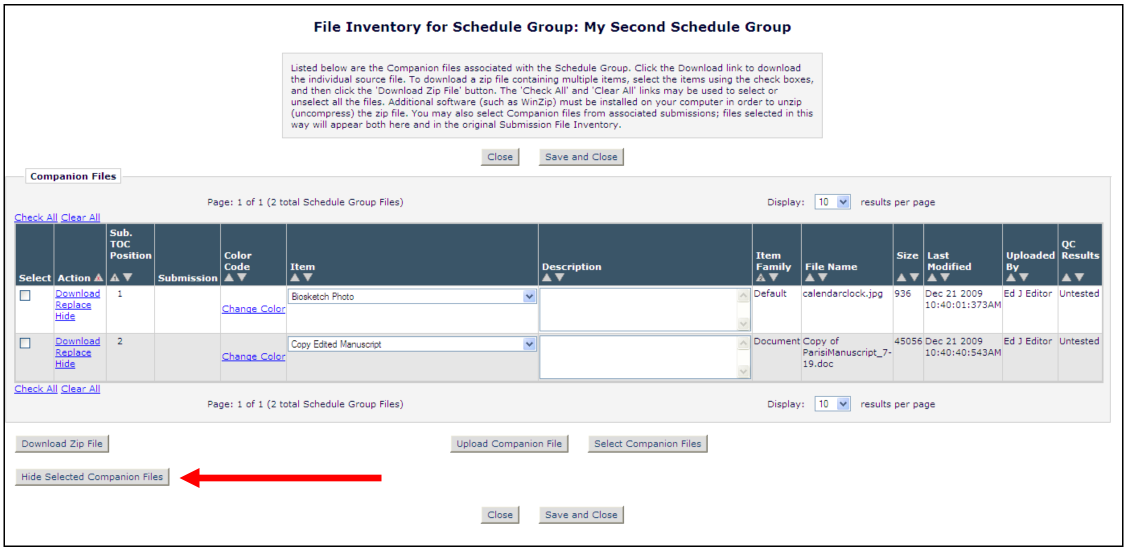
Hide Multiple Companion Files

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.



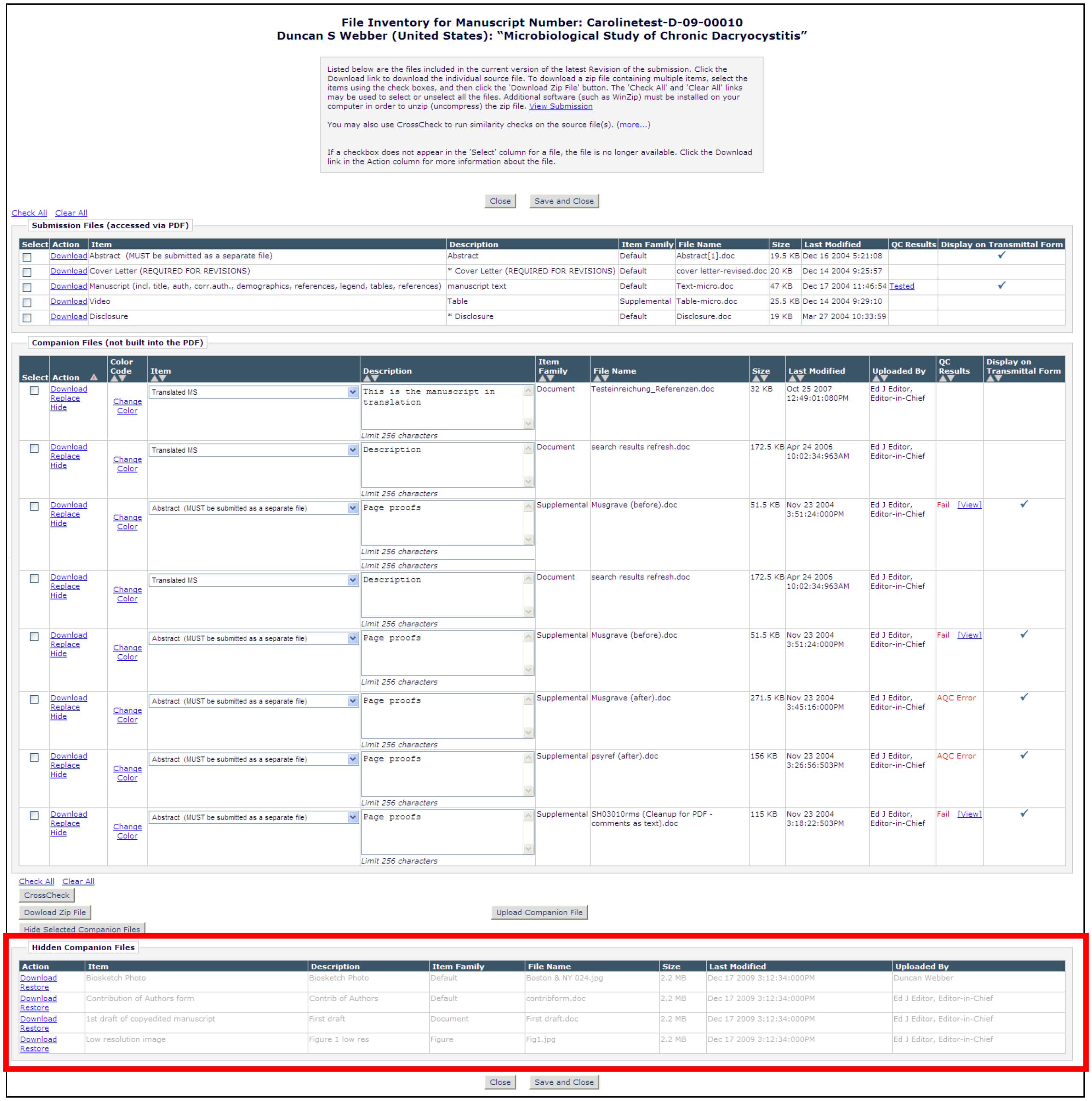


Users with proper permission may select multiple companion files to be hidden by checking/selecting the appropriate box in the 'Select' column, then clicking the 'Hide Selected Companion Files' button.

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.