

Welcome to the 17th Annual  
**EMUG BOSTON**

#EMUG2019



# EMUG 2019



## Overview of Versions 16.0 & 16.1

**Tony Alves**

**Director, Product Management**

**[Orcid.org/0000-0001-7054-1732](https://orcid.org/0000-0001-7054-1732)**

# **Version 16.0**

**Beta March/April 2019**

**Upgrades June/July 2019**

# Security, Privacy & GDPR

Keeping data secure and private is a top priority for Aries!

GDPR – ongoing changes based on your feedback!

## REMINDER:

- Data Controller – the entity that determines the purposes, conditions, and means of processing personal data.
- Data Processor – processes personal data on behalf of the Data Controller.
- Under these terms,
  - The **Publisher, Society, or Journal** is the *Data Controller* (Journal staff implement Data Controller policies)
  - Aries Systems Corporation is a **Data Processor**

# Account Lockout Policy Enhancement

The EM/PM system will lock the account of any user who makes five failed login attempts within five minutes.

The account will be unlocked automatically after 10 minutes, and the user can try again to log in.

A warning message is displayed after second, third, and fourth attempts.

## Login Failed

You have entered an invalid username/password combination. Your account will be locked after **5** failed login attempts. The account will be unlocked and available 10 minutes after your last login attempt.

Number of attempts: **2**

If you have forgotten your username or password, go to the Login page and click Send Login Details. Enter your email address, and you will receive your username and a link via email to change your password.

# Enhanced Security for EM Text Fields

A security tool is in place to protect text input fields from cross-site scripting (CSS) attacks. If the tool determines potentially malicious HTML input in a text field, that field content is not rendered but is instead displayed in the interface as [EXSCINDED].

**Details for Manuscript Number: LAURENDEV160-D-19-00014**  
[EXSCINDED]<span>fname</span> <a>Iname</a>(UNITED STATES): "Figure This"



[Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Additional Information](#) [Author\(s\) Invited to Submit Commentary](#)

<b>Additional Manuscript Details:</b>	<a href="#">Add/Edit Additional Manuscript Details</a>
<b>Corresponding Author:</b>	[EXSCINDED]<span>fname</span> <a>Iname</a>  UNITED STATES <span style="background-color: yellow;">[Proxy]</span>
<b>Corresponding Author E-Mail:</b>	<a href="mailto:junk@email.com">junk@email.com</a>
<b>Author Comments:</b>	
<b>Short Title:</b>	
<b>Article Type:</b>	Special Issue Article
<b>Section/Category:</b>	

# More Proxy Restrictions

Editors can be restricted from performing proxy activities in a user account until that user has acknowledged the privacy policies.

- RoleManager Permission

Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role
Buzz Aldrin, PhD		MA	UNITED STATES	[Author]	[Reviewer]		
Buzz Lightyear Aldrin, PhD  !	Cambridge	MA	UNITED STATES	Author	Reviewer		
Josh Allen			UNITED STATES	[Author]	[Reviewer]		
Amy Author	Atkinson	NH	UNITED STATES	[Author]	[Reviewer]	[Managing Editor]	
Cindy Author			CANADA	[Author]			
Sandy Author	North Andover	MA	UNITED STATES	[Author]			
Stephen Author	Hanover	NH	UNITED STATES	[Author]		[Section Editor]	
Susan Author		MA	UNITED STATES	Author			

# Custom Registration Questions

Currently Registration Questions or Statements can appear whenever a new user registers or when an existing user logs into the system. Registration Question/Statement responses are a single checkbox, where the user either ticks or does not tick the box.

There is a need to ask more complex questions during the registration process and to collect data on those registering and on registered users in general.

**SOLUTION:** The Additional People Details function will be enhanced so that there will be an option to display APD's during user registration and on the *Update My Information* page.

# Custom Registration Questions

Registration Questions appear when a new user registers, or when an existing user logs in. In current functionality,

- If a Registration Question is “Required” a new user must respond in order to register. Response cannot be changed.
- If a Registration Question is “Forced” existing users are directed to the questions when they log in, and must respond. Response cannot be changed.
- If a Registration Question is “Optional” it can be skipped. It can also be changed.

The only response to a Registration Question is a checkbox.

# Custom Registration Questions & APDs

NEW! Additional People Detail fields can be configured to appear during new user Registration.

Response types: Text, Date, Integer, Notes, Lists

### Required Questions

---

Please respond to the question(s) below by checking the box(s) and clicking Continue:

---

This publication requires all users to confirm that they are not logging in on Saturday. Please tick the checkbox to proceed with your task at hand.

\* Today is absolutely, positively not Saturday.

\* I have read the [Publisher's Data User Privacy Policy](#) and the [Aries Privacy Policy](#).

\* **When is your birthday?**  (mm/dd/yyyy)

\* **What is the value of Pi ( $\pi$ )?**

\* **Please order a refreshing beverage:**

Please select a beverage

Please select a beverage

A strong cup of coffee

**A chilled glass of Sauvignon Blanc**

A frosty Coca-Cola

A cold brew

A tall glass of lemonade

<< Logout    Continue >>

# APDs – Registration

APDs can be set to Hidden, Optional or Forced on the *Registration* page.

The settings below affect the pages related to a user's registration record. Additional People Detail Fields can be configured for Optional or Required responses at registration, or Hidden. 'Enforced at Login' means that users must enter a response the first time they log in after the field was added. Responses to Additional People Detail Fields on the Update My Information page may be configured as Hidden, Editable, or Not Editable. These settings apply both to the owner of the registration record and to editors viewing the Update My Information page in proxy mode.

Page	Options	Help Text
Confirm Registration	<input type="text" value="Optional"/> Hidden Optional Required Enforced at Login Optional	
Update My Information	<input type="text" value="Hidden"/> Hidden Editable Not Editable	

# APDs – People Records

APDs can be configured to appear on the *Additional People Details (existing)* page, and/or on the *Search People – Update Information (new)* page.

Help text is entered, a help link or icon is displayed on the appropriate page.

Page	Hide	Editable	Required	Help Text
Additional People Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input type="text"/>
Search People - Additional Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input type="text"/>
People Activity Details	<input type="checkbox"/>	N/A	N/A	<input type="text"/>
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

# APDs – Hidden From Certain Roles

APDs can be configured to be hidden from certain roles. For example, APDs whose responses reveal age, race, or other sensitive personal information may be disclosed to editorial staff members, but concealed from editors or associate editors.

**Field Description:**

[Insert Special Character](#)

Likes cats?

*Maximum 256 characters*

**Field Type:**

List



[View/Edit Values for Drop-down List](#)

**Hide this field from:**

Managing Editor  
Editor-in-Chief  
Editor  
Associate Editor

## Options

Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional People Details

# APDs – Users Can View, Enter and Edit

APDs can now be configured to be accessible to a user via the *Update My Information* page.

- APDs will **not** be shown to Editors during proxy registration .
- APDs will **not** be shown on a user's *Update My Information* page in proxy mode.

This allows the publication to collect data directly from a user on their People Record

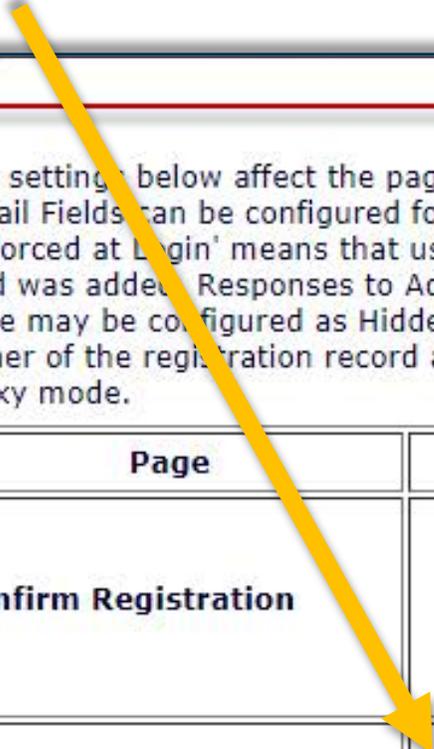
Per GDPR – this will allow a publication to expose data that is being collected about a user to that user, if they wish.

# APDs – Users Can View, Enter and Edit

APDs can be set to Hidden, Editable or Not Editable on the *Update My Information* page.

The settings below affect the pages related to a user's registration record. Additional People Detail Fields can be configured for Optional or Required responses at registration, or Hidden. 'Enforced at Login' means that users must enter a response the first time they log in after the field was added. Responses to Additional People Detail Fields on the Update My Information page may be configured as Hidden, Editable, or Not Editable. These settings apply both to the owner of the registration record and to editors viewing the Update My Information page in proxy mode.

Page	Options	Help Text
Confirm Registration	<input type="text" value="Optional"/> Hidden Optional Required Enforced at Login Optional	
Update My Information	<input type="text" value="Hidden"/> Hidden Editable Not Editable	



# **MORE Additional People Detail Fields**

## **Identity Confidence Check & People Record Management**

Grand Ballroom

Friday, 1:30 - 2:30

See how EM's Identity Confidence Check can be optimized for your individual workflow needs. Plus, learn more about other helpful identity management tools such as detailed people notes.

# Shortcuts for Search Submission

Allow “R” in MS Number Search – e.g., ASC123R2

The screenshot shows a submission management interface. On the left is a menu with options like 'View Submission Details', 'History', 'Classifications', etc. The main area displays a table with submission details:

Original Research	DEMO-D-04-00073R1	Edward Editor
-------------------	-------------------	---------------

Below the table is a search criteria builder with tabs: 'Help with Searching', 'Insert Special Character', 'Value Options', and 'Advanced Criteria'. The 'Value Options' tab is active, showing a search criteria table:

(	Criterion	Is/Is not	Selector	Value	)
	Manuscript Number	is	Contains	DEMO-D-04-00073R1	

An 'Add' button is located at the bottom right of the search criteria table. A yellow arrow points from the manuscript number 'DEMO-D-04-00073R1' in the submission table to the 'Value' field in the search criteria table.

# Email Import/Drop-box Improvements

**Email Imports – Subject Line:** Currently, emails imported to EM using the Email Import/Drop-Box feature display ‘Imported E-mail’ in the Correspondence History. This description can be edited after import.

A new configuration option will allow publications to have the **subject** line of an imported email display as the description.

# Email Import/Drop-box Improvements

## Configure Email Import

A user who receives replies, outside the system, to system-generated Emails may add them to the appropriate Correspondence History by forwarding them to the 'Drop-Box' address displayed below, once submitted.

### Partial Page Shown

Once activated, the system will attempt to import Email sent to the 'Drop-Box' address. If this import fails, and the mail subject line contains a valid import identifier code created by EM, then the system can forward the failed Email to a contact address for notification. To enable failure notifications, type in the desired Email address below. Delete this address to disable this feature.

#### Set Email Address for Failure Notifications:

Display subject line in the 'Letter' column in Correspondence History

# Email Import/Drop-box Improvements - previous

## CORRESPONDENCE HISTORY

Add Editorial Correspondence

Add Production Correspondence

Correspondence Date	Letter	Recipient	Status
Aug 4 2017 10:19PM	Prod - Production Task Assignment		Final Requests Before Production Complete; FTC C Production; Sent to Composition
Aug 4 2017 10:19PM	Prod - Production Task Completed		Final Requests Before Production Complete; FTC C Production
Aug 4 2017 2:49PM	Prod - Production Task Completed		Final Requests Before Production Complete; FTC C Production Accept; Sent to Production
Aug 4 2017 2:25PM	Imported E-mail (External) <a href="#">Remove</a> <a href="#">Edit</a>		
Aug 4 2017 12:15PM	Prod - Final Requests Before Production Completed		Final Requests Before Production Complete; FTC C Production Accept; Sent to Production
Aug 3 2017 4:27PM	Imported E-mail (External) <a href="#">Remove</a> <a href="#">Edit</a>		
Jul 18 2017 10:12AM	Prod - Final Requests Before Production 		Final Requests Before Production in Progress; FTC Production Accept; Sent to Production
Jul 17 2017 10:01PM	Prod - Production Task Assignment		FTC Complete; FTC Fail in Progress; PM in Progress

# Email Import/Drop-box Improvements - new

Close

**CORRESPONDENCE HISTORY**

[Add Editorial Correspondence](#)   [Add Production Correspondence](#)

Correspondence Date	Letter	Recipient	Status
Aug 4 2017 10:19PM	Prod - Production Task Assignment	Compositor	Final Requests Before Production Complete; Sent to Production; Sent to Composition
Aug 4 2017 10:19PM	Prod - Production Task Completed	Susie Kabloози	Final Requests Before Production Complete; Sent to Production
Aug 4 2017 2:49PM	Prod - Production Task Completed	Susie Kabloози	Final Requests Before Production Complete; Production Accept; Sent to Production
Aug 4 2017 2:25PM	RE: Request for additional proofs for Manuscript Number DEMO-D-18-04468 (External) <a href="#">Remove</a> <a href="#">Edit</a>		
Aug 4 2017 12:15PM	Prod - Final Requests Before Production Completed	Editorial Staff	Final Requests Before Production Complete; Production Accept; Sent to Production
Aug 3 2017 4:27PM	RE: ORCID request for DEMO-D-18-04468 (External) <a href="#">Remove</a> <a href="#">Edit</a>		
Jul 18 2017 10:12AM	Prod - Final Requests Before Production 	Anthony Author	Final Requests Before Production in Progress; Production Accept; Sent to Production
Jul 17 2017 10:01PM	Prod - Production Task Assignment	Editorial Staff	FTC Complete; FTC Fail in Progress; PM in Progress
Jul 15 2017 6:00PM	Prod - Production Task Assignment	Susie Kabloози	FTC Complete; PM in Progress; Production A
Jul 14 2017 5:02PM	Formal Accept Letter	Anthony Author	Completed Accept

# Email Import/Drop-box Improvements

**Email Imports – Configurable Drop-Box Address:** Currently, the Drop-Box Email Address used for email import is automatically generated. The system-generated email address is difficult for some editors to remember.

A new configuration option will allow publications to configure a custom drop-box email addresses.

# Email Import/Drop-box Improvements

Email address contains “em” + “journal acro” + randomly generated series

## Configure Email Import

A user who receives replies, outside the system, to system-generated emails may add them to the appropriate Correspondence History by forwarding them to the Drop-Box address displayed below, once submitted.

If you **configure or automatically** generate and submit a new address, any previous address is made inactive and cannot be used again (this allows you to retire an address that has become a target for spam emails). **Click the 'Clear Address' button** and submit the page to turn off the ability to import mail into the publication.

You must submit this page for any changes to the Drop-Box Address to take effect. You should inform anyone who forwards mail in this way immediately of any changes to this address.

**Set Drop-Box Email Address:**

emdev.staceydev141-ce7daa43c75201f0@editorialmanager.com



Configure New Address

Automatically Generate New Address

Clear Address

# Email Import/Drop-box Improvements

Email address contains “em” + “journal acro” + Your Choice!

## Customize Drop-Box Email Address

In the textbox below, enter the customizable portion of the drop-box email address. The prefix and suffix shown cannot be changed. The drop-box email address:

- Can only include letters, numbers, periods (.), and dashes (-).
- Cannot be reused once it has been retired.
- Becomes active when the 'Submit' button is clicked on the Configure Email Import page.

em.demo150-  @editorialmanager.com

Cancel

Save

# People-Based Correspondence History

Users can access a Correspondence History of MOST emails received.

- Includes most correspondence that user has received, whether it is associated with a submission or not (such as a batch email).
- Editors with permission to edit and resend letters will be able to do so.
- Editors with appropriate permission will be able to access other users' Correspondence History via Search People, Update Information page.
- Editors “blinded” to a submission will not see related emails.

# People-Based Correspondence History

Correspondence History can be filtered:

1. A fixed date range
2. A customized start and end date
3. Number of results per page displayed
4. The user can set grid options by clicking the gear icon.

**Correspondence History for Rebecca Reef**

1 →  Choose Fixed Date Range: All Dates

2 →  Enter Customized Date Range (mm/dd/yyyy): Start Date: End Date: Go

Close

Correspondence History

Page: 1 of 1 (53 total correspondence) 1 3 → 100 results per page. 4

Correspondence Date	Letter	Recipient	Manuscript Number	Article Title
11/05/2018 11:00:43	Reviewer Thank You	Rebecca Reef	SAMDEV140-D-17-00023	Snow Crystals
11/05/2018 10:59:33	Reviewer Instructions and Due Date	Rebecca Reef	SAMDEV140-D-17-00023	Snow Crystals
11/05/2018 10:55:53	Reviewer Invitation	Rebecca Reef	SAMDEV140-D-17-00023	Snow Crystals
10/29/2018 16:01:23	Letter	Rebecca Reef	SAMDEV151-D-18-00029	Top Secret Full Title
10/26/2018 16:24:49	Reviewer Thank You	Rebecca Reef	SAMDEV150-D-18-00009	Questions for Everyone

# MORE Letters and Correspondence

## Effective Communication in EM: Letters & More

Grand Ballroom

Thursday, 1:15 - 2:00

How to communicate effectively with Authors, Editors, and Reviewers in EM. Featuring new letter functionality such as people-based correspondence history, improved drop-box, and more.

# “Author Title” added to Author List File

When inviting Authors for an Invited Workflow an Editor can upload a list of Authors from an external Author List File (ALF), so that the Editor does not have to search for and invite each Author individually.

- Current fields include First Name, Last Name, Email, Invitation Note, ORCID, Article Title.
- People “Title”, such as Mr., Ms. Prof., Dr., etc. can now be included.

AUTHOR_TITLE	FIRSTNAME	LASTNAME	INVITE	ORCID	EMAIL	NOTE	TITLE
Dame	Mary	Smith	TRUE	0000-0002-0136-5875	<a href="mailto:mary@ariessys.com">mary@ariessys.com</a>	Unit 1	
Dr.	John	Andrew	FALSE	0000-0003-0879-1234	<a href="mailto:john@ariessys.com">john@ariessys.com</a>		
	Eric	O'Connell	TRUE	0000-0005-0789-1234	eric@ariessys.com	Unit 5	Cause & Effect
Ms.	Danielle	Harding	TRUE	0000-0001-7845-1234	danielle@ariessys.com	Unit 3	

# Separate ORCID ID Request for New & Revised Submissions

Corresponding Authors can provide authenticated ORCID identifier during the submission process. This request applied to all submissions associated with the Article Type, regardless of when the submission was created or whether the submission was new or revised. This created problems for publications that did not want to require Authors to provide an identifier on a revised submission if they were not asked to provide it with the original submission.

**SOLUTION:** An ORCID request can be set separately for new submissions and revised submissions. This means that an Article Type can be configured to **NOT** require an ORCID when an Author submits a new manuscript and to **REQUIRE** one when an Author submits a revised manuscript.

# Separate ORCID ID Request for New & Revised Submissions

	New Submission	Revised Submission
Authenticated ORCID iD Request:	Optional ▼	<div>Optional ▼ Hidden Optional Required</div>

The system will check the current status of this setting (when the Author submits the revision) rather than the status at the time the original submission was created.

The authenticated ORCID iD request setting that applies to co-authors during the verification process is not affected by this enhancement.

# Configurable Default Setting for ORCID Review Deposit Approval

ORCID Review Deposit request: Reviewers are asked for consent, and they respond Yes or No. In the initial feature release, No was selected by default, allowing Reviewers to submit reviews without responding to the question.

**SOLUTION: Publications configure the default response to the review deposit authorization. The default setting can be No or Please Select (which requires the Reviewer to actively select Yes or No).**

**ORCID Reviewer Credit**

[Instructions] Your ORCID ID: 0000 

\* Do we have your consent to update your ORCID Record's Review Activity (subject to publication policy) to show that you completed a Review for this publication? This might trigger a one-time Authorization interaction with ORCID on proceeding.

Please Select  Yes  No  Make this my default selection on applicable future Review forms (you will be able to change this choice).

# MORE ORCID

## ORCID Update

Olympia

Thursday, 1:15 - 2:00

See what new functionality the ORCID/EM integration has to offer.

# Co-Author Verification

Co-Authors can be asked to independently verify their authorship of a submission, which helps prevent false or inaccurate author lists.

Currently, co-authorship verification status cannot be set or changed by Editors or staff, this means that verification status must be cleared and the request sent again to the co-author. This can be frustrating to authors who are providing verbal verification, and it is obviously an unrealistic expectation for deceased authors.

**SOLUTION: A new RoleManager permission will allow Editor roles to set co-author verification status manually.**

Note: Publications can now import co-author verification statuses as part of the EM Ingest service, showing co-authors who have confirmed co-authorship of a submission via a third-party submission partner.

# Co-Author Verification

This only allows an Editor to set verification status to “yes” or “no”, it does not require ORCID retrieval or provide access to the co-author questionnaire. Those two actions must be taken by the actual co-author.

**Edit Submission**

- Edit Submission Before Decision
  - View Reviewer PDF After Edit Submission
  - Require View of Reviewer PDF After Edit Submission
- Edit Submission After Decision and Final Disposition
- Download Source Files
  - Download Companion Files
  - Upload, Hide and Restore Companion files
- Assign Manuscript Classifications
- Manage Other Authors
  - Edit Other Author E-mail Address
  - Set Co-Author Verification Status**
- Bypass 'Restricted File Types' Requirements
- Edit Global MS ID

Confirmed?	Options
▲▼ Yes (by Twink E. Jonesey) Jul 18 2017 9:04 AM <a href="#">Change</a>	<a href="#">Reset Confirmation Status</a> <a href="#">View Author Details</a> Questionnaire Not Completed
Yes (by Twink E. Jonesey) Jul 18 2017 9:05 PM <a href="#">Change</a>	<a href="#">Reset Confirmation Status</a> <a href="#">View Author Details</a> Questionnaire Not Completed

# URL/URI Submission Item Verification

Publications can configure a Submission Item to be a “URL/URI” (populated by the Author at submission). This appears as a link which leads the user to the location of the file on the web.

This means the Author does not need to upload the large files, such as data sets & videos.

Publications would like the system to independently confirm that a URL/URI entered by an Author actually points to a live web page.

**SOLUTION: A configuration option will require the EM system to ping the Author-provided URL to test that it actually resolves to a real webpage.**

**SOLUTION: Authors can be required to click the “Preview” button before clicking the “Attach This Information” button.**

# URL/URI Submission Item Verification



Article Type Selection



Attach Files



General Information



Review Preferences



Comments



Manuscript Data

## Required For Submission:

- Manuscript
- URL ONLY

Please provide any additional items.

Insert Special Character

Select Item Type

\*URL ONLY

Description

URL ONLY

URL/URI/External Resource Location:

http://

Preview

Please select http://, https://, ftp:// or sftp://, then type in the remainder of the web address (e.g. www.example.com).  
Once you are satisfied with the address, click the Preview button to ensure that the address is valid.

Attach This Information

Warning: 1 or more items may require attention

Change Item Type of all  files to

[Dismiss All](#) [Check All](#) [Clear All](#)

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	*Manuscript	Manuscript	Test Submission.docx	1.2 MB	Feb 12 2018 03:41PM	Download	<input type="checkbox"/>
2	*URL ONLY	URL ONLY	External Item		Mar 30 2018 11:53AM	Access Item	<input type="checkbox"/>
	Not Attached: Invalid URL					Dismiss	<input type="checkbox"/>

Warning: 1 or more items may require attention

[Dismiss All](#) [Check All](#) [Clear All](#)

# URL/URI Submission Item Verification

## Edit Submission Item Type

[Insert Special Character](#)

Item Type:

*Maximum 256 characters*

Item Type Family:

This Submission Item Type is a Companion File (not built into PDF)

Reviewer PDF Handling

Author/Editor PDF Handling

Important Note: If 'Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

URL/URI/External Resource Entry (in lieu of file upload) :

Require HTTPS/SFTP for URL/URI/External Resource Entry

**Validate URL/URI**

**Require user to click Preview button**

Display with automatic line numbering in PDF

Include this Item Type for Artwork Quality Checking

Do Not Unpack Archive files (.ZIP, .tar) of this Type

Include this Item Type for checkCIF

Include this Item Type for Reference Checking

This Item Type will contain reference annotations. [Example](#)

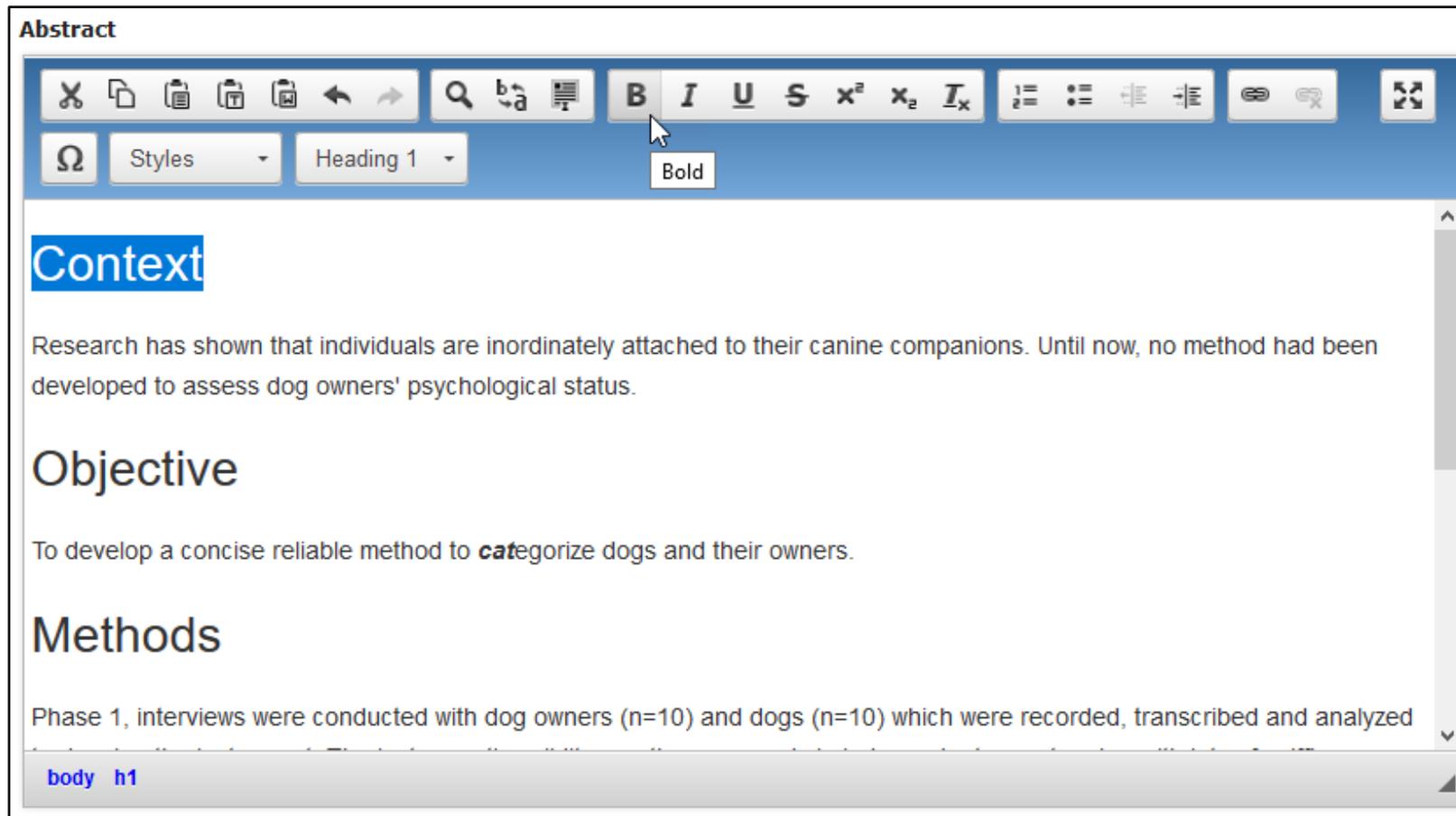
# Rich-text Editing Enhancement to Submission Interface

The Submit Manuscript interface allows Authors to upload a submission file that the system uses to automatically populate select submission metadata fields, making the submission process more efficient for Authors.

However, some formatting was lost during the process, and the Author was not able to add it back in.

**SOLUTION:** The extraction process is enhanced to preserve rich text formatting found in the original manuscript. The interface now also enables Authors to edit this formatting in the Title and Abstract fields. An editing toolbar appears above the fields on the Manuscript Data screen.

# Rich-text Editing Enhancement to Submission Interface



The editing tool enables Authors and Editors to format the Title and Abstract fields during the submission process (new and revised submissions).

# Editor Decision Form Improvement

There is a desire to have Editors complete a questionnaire on the Editor Decision Form, similar to the questionnaires that can be presented to Reviewers.

**SOLUTION: The Review Questions feature will be enhanced so that questions can be configured to appear on the Editor Decision form.**

- This function mirrors the existing Custom Review Questions function
- Questions will be available for both the initial and revised submissions
- Questions and responses can be merged into letters

# Editor Decision Form Improvement

From the *Add/Edit Editor Form* page, the administrator selects questions from the existing pool of Review Questions, orders them, selects visibility and required/optional status.

### Custom Review Questions

Select Questions

*No Custom Review Questions have been added to this Form*

### Custom Review Questions

Select Questions

Order	Question	Required for Submission	Visible to Reviewers	Visible to Author	Actions
1	This is a custom review question #1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
2	This is custom review question #2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
3	This is review question #3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
4	List question	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
5	This is a yes/no/text question	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>

Update Item Order

# Editor Decision Form Improvement

The “Editor Review Questions” will display on the Editor Decision Form.

Other sections might be:

- Comments to Author
- Confidential Comments to Editor
- Decision Phrases
- Review Ratings

Section Editor Decision and Comments for Manuscript Number SALLYDEV150-D-18-00009R1

Spec. 16.0-06 Test 3

Revision Number 1  
Michael Editor (Section Editor)

Decision:  Overall Editor Manuscript Rating (1-100):

[Details](#) [History](#) [Attachments \(2\)](#) [Assign Editor](#) [Invite Reviewers](#) [View Manuscript Rating Card](#) [View Review Question Responses](#) [Send E-mail](#)

	Revision 1	Original Submission
Cindy Reviewer (Reviewer 1)	Minor Revision	Major Revision
Karen Reviewer (Reviewer 2)	Minor Revision	Major Revision

Editor Review Questions [Insert Special Character](#)

Do you have a pet? [\[Instructions\]](#)

Editor Question #1 (Limit 2000 Characters)

This is Michael Editor's response to Editor Question #1

Character Count: 53

Editor Question #2 (Limit 2000 Characters)

This is Michael Editor's response to Editor Question #2

Character Count: 53

Company Confidential - Arics Systems Corporation

# Editor Decision Form Improvement

Grids will display showing Reviewer and other Editor responses – if configured

**Reviewer Questions and Responses**

Expand All / Collapse All

Cindy Reviewer Reviewer 1	Roger Rabbit Reviewer 3	Karen Reviewer Reviewer 2
Do you have a pet?		
<input checked="" type="checkbox"/> Yes:I still have two cats.	<input checked="" type="checkbox"/> Yes:I have a Norwegian Elkhound	<input checked="" type="checkbox"/> No
Where did you go on vacation?		
<input checked="" type="checkbox"/> I went to Dublin and London	<input checked="" type="checkbox"/> France	<input checked="" type="checkbox"/> I stayed home
This is a large Notes response-type question		
At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem rerum facilis est et expedita distinctio. Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe eveniet ut et voluptates repudiandae sint et molestiae non recusandae. Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis voluptatibus maiores alias consequatur aut perferendis doloribus asperiores repellat(less...)	At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem rerum facilis est et expedita distinctio. Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe eveniet ut et voluptates repudiandae sint et molestiae non recusandae. Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis voluptatibus maiores alias consequatur aut perferendis doloribus asperiores repellat(less...)	

Cancel Save & Submit

Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis voluptatibus maiores alias consequatur aut perferendis doloribus asperiores repellat(less...)

Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis voluptatibus maiores alias consequatur aut perferendis doloribus asperiores repellat(less...)

**Editor Questions and Responses**

Expand All / Collapse All

Michael Editor Section Editor	Another Editor Section Editor
Do you have a pet?	
<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No Response
Editor Question #1	
<input checked="" type="checkbox"/> This is Michael Editor's response to Editor Question #1	<input checked="" type="checkbox"/> This is Another Editor's response to Editor Question #1
Editor Question #2	
<input checked="" type="checkbox"/> This is Michael Editor's response to Editor Question #2	

# MORE Editor Decision Form

## Custom Questions in EM

Olympia

Thursday, 3:15 - 4:15

Discover how to create custom questions for Authors, co-Authors, Editors, and Reviewers, featuring new Editor Form Questionnaire functionality.

# Additional Manuscript Detail Field Enhancement

Date field type available for defining an Additional Manuscript Detail (AMD) field is enhanced to enable the field to capture and display date *and* time.



(mm/dd/yyyy) 1 Hour 00 Min AM

### Add Additional Manuscript Detail Field

Cancel Submit

**Field Description:** Insert Special Character

*Maximum 256 characters*

**Field Type:** Date

Include Time entry

Prevent entry of dates in the past

**Set Date/Time Format for display:** mon dd yyyy hh:mi AM( or PM )

mon dd yyyy hh:mi AM( or PM )

yyyy-mm-dd hh:mi:ss(24 hour)

**Default Value for Field:**

*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

Single value (enter value below)

# Submission Updates via EM Web Services API

A new **General Purpose Transactional API and Web Service** was introduced in version **15.1**. This API allows customers to retrieve submission metadata from the system using API calls.

EM will now allow select submission data, specifically **Additional Manuscript Detail (AMD)** fields, to be sent to the system with the intention of populating or overwriting data already in those fields.

# MORE Webservices API

## **Transactional API & other APIs**

Grand Ballroom

Thursday, 2:05 - 3:00

Details and use cases on recent purpose-built and generic Editorial Manager API's. These APIs allow publishers to better integrate peer review workflow with in-house and trusted third-party applications.

# ProduXion Manager

**Display Production Notes (Editable) on PSG:** See and edit the Production Notes directly in the Production Status Grid without opening the Details page.

Production Status Grid						
		Show: <input type="text" value="Unassigned Submissions"/>				
Page: 1 of 6 (147 total submissions)			1 2 3 4 5 6 ▶▶▶			25
Action	Author Name	Manuscript Number	Article Type	Article Title	Production Notes	Production Status
<a href="#">Production Details</a> ▾ <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">Assign Production Task</a> <a href="#">Assign to Schedule Group</a> <a href="#">File Inventory</a> <a href="#">End Production</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	keith sails ▾	SMOKETEST-102-132	ArticleTypeV	67315 / 25694 ELEMENTA: JATS 1.0A v2 transmittal will continuously include custom submission questions if they have ever been included in XML previous for any previous task	<b>1</b> Donec et augue sit amet sem mattis suscipit. Sed malesuada ligula et tellus semper, porta varius ligula maximus. Cras nec imperdiet enim. Maecenas pellentesque velit nec nibh congue, a tempus libero mattis. Vestibulum euismod, elit et tincidunt <a href="#">more...</a> <a href="#">Edit</a>	Fresh In; New In Production; 9.0-13 awaiting action
<a href="#">Production Details</a> ▾ <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">Assign Production Task</a> <a href="#">Assign to Schedule Group</a> <a href="#">File Inventory</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	rory mi x ▾	SMOKETEST-102-133	Co-Authors Verify on New Submission, Fee	Scrolling Selector TEST	<b>2</b> Donec et augue sit amet sem mattis suscipit. Sed malesuada ligula et tellus semper, porta varius ligula maximus. <a href="#">Edit</a>	Fresh In; New In Production; Ready For Copy Editing; Artwork Being Redrawn; 9.0-13 awaiting action
<a href="#">Production Details</a> ▾ <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">Assign Production Task</a> <a href="#">Assign to Schedule Group</a> <a href="#">File Inventory</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	Bob Anderson ▾	SMOKETEST-102-134	Co-Authors Verify on New Submission, Fee	Scrolling Selector List by Bob	<b>3</b> No Production Notes have been entered. <a href="#">Edit</a>	Fresh In; New In Production; Ftp'd in progress

# ProduXion Manager

**Drag and drop files for Production Tasks:** Today, file upload for submitting an article is feature-rich! This will be extended to PM file uploads.

---

**Important Note:** This page allows you to upload **one or more new files** to attach to this submission.

When an **Item** is selected, you can enter an optional **Description**, and upload one or more files to the list of Companion Files.

---

Item:  ▼

Description:

Character Count: 0 / 256

Or Drag & Drop Files Here



# **MORE ProduXion Manager**

## **ProduXion Manager Bootcamp**

Olympia

Friday, 1:30 - 2:30

Just starting out with ProduXion Manager, or interested in learning more? This session provides a basic overview and introduction.

## **ProduXion Manager User Group**

Queen Mary

Friday, 10:25 - 12:30

All about PM, this session will cover functionality, feedback, and reporting.

# Web Analytics – what is it?

- A product offering from an outside service (like Adobe Analytics, Google Analytics), that measures activity on specific pages of your EM site
- You sign up with the service and pay a fee
- You see the results on a "dashboard" on that service
- You can create your own reports on that service
- EM sends the data from the EM pages to your dashboard on that service
  - Another customer *cannot* see *your* data

# Web Analytics – What Questions Can it Answer?

How many unique users visit your EM site?

- Per Hour
- Per Day
- Per Month
- Per Year

How easily are users getting through their workflow?

- Registration
- Login
- Author Submission
- Review completion
- Editor decision

Are users getting "stuck", and if so, where?

# Web Analytics – how does it work in EM?

- A snippet of code is inserted into EM pages. This snippet tells the EM page what data to send & where to send it.
- You provide us (Aries Client Services) with the snippet (the service provider may provide it to you).
- Currently, 100+ EM pages are enabled to receive the snippet. The snippet is unique to each journal/publisher.
- The dashboard will enable you to report by date, journal, page, etc.

# MORE Analytics

## **Analytics Showcase**

Grand Ballroom

Thursday, 3:15 - 4:15

Analytics integrations are forthcoming in Editorial Manager. Hear more about plans for integration and how analytics can improve your workflow. This includes a practical exploration of what to look for and how to interpret reports, by Jason Roberts of Origin Editorial.

# **Version 16.1**

**Beta to begin September/October 2019**

**Upgrades December/January 2019**

# Reassign Open Editor Assignments

Editors often leave a publication with open assignments – often they are stepping down as Editor-in-Chief or some other editorial board role.

Currently there are ways to handle reassignment of papers from one Editor to another, but these processes are manual and sometimes they skew historical data.

**SOLUTION: New functionality will allow open assignments to be either transferred batchwise from one editor to another or distributed among multiple new editors.**

# Reassign Open Editor Assignments

The user goes to a page that lists all the open assignments associated with that Editor.

A checkbox appears next to each.

User selects the submissions and clicks the Reassign button.



→ **Select Open Tasks for Reassignment - Lauren Oppenheim**

Lorem ipsum: Curabitur porttitor risus a tellus laoreet, in volutpat metus consectetur. Lorem ipsum dolor sit amet, consectetur adipiscing rhoncus mauris ut libero hendrerit, et vestibulum sapien consequat. Cras luctus vehicula sapien. Nunc ac

Page: 1 of 2 (15 total submissions) 1 2 ▶ ⏪

	Manuscript Number	Article Title	Author Name	Article Type	Initial Date Submitted	Status Date	Current Status
<input checked="" type="checkbox"/>	LAURENDEV150-D-18-00004	Test to check which fields scrolling selector box responses populate in the db	Skipper Braud	Original Study	Jan 26, 2018	Jan 26, 2018	With Editor
<input checked="" type="checkbox"/>	LAURENDEV150-D-18-00003	Test with multiple email addresses for Suggest Reviewers and Co-Authors	Molly Carroll	Original Study	Jan 22, 2018	Jan 22, 2018	With Editor
<input checked="" type="checkbox"/>	LAURENDEV150-D-18-00001	Coco's submission to Merge Me Editor #2	Coco Mortenson	Original Study	Jan 18, 2018	Jan 18, 2018	With Editor
<input checked="" type="checkbox"/>	LAURENDEV150-D-18-00002	Gib's submission to Merge Me Editor #1	Gib Haffernick	Original Study	Jan 18, 2018	Jan 18, 2018	With Editor
<input checked="" type="checkbox"/>	LAURENDEV141-D-17-00017	Bert's submission to Thor's proposal	Gijsbertus Loos	Special Issue Article	Dec 21, 2017	Dec 21, 2017	With Editor
<input type="checkbox"/>	LAURENDEV141-D-17-00018	Fokke's submission to Thor's proposal	Fokke Naaktgeboren Niemandsverc van Zuidewijn	Special Issue Article	Dec 21, 2017	Dec 21, 2017	With Editor
<input type="checkbox"/>	LAURENDEV141-D-17-00013	Cali's submission to the Discussion Forum proposal	Calista Oppenheim	Special Issue Article	Dec 18, 2017	Dec 18, 2017	With Editor
<input checked="" type="checkbox"/>	LAURENDEV141-D-17-00014	Coco's submission to the Discussion Forum proposal	Coco Mortenson	Special Issue Article	Dec 15, 2017	Dec 18, 2017	With Editor

# Reassign Open Editor Assignments

The user then selects the appropriate Editor.

- Restricted to the selection of editors with the same role
- Assigning tasks to multiple editors will be an iterative process

## Reassign to New Editor

Open tasks associated with **Lauren Oppenheim** will be reassigned to the editor selected on this page.

Maecenas interdum suscipit venenatis. Pellentesque a leo diam. Mauris scelerisque diam sapien, vitae feugiat leo eleifend eu. Nulla convallis quam ut urna dictum, et pellentesque metus ornare. In elementum, ex a fermentum gravida, diam sem dictum erat, facilisis faucibus metus lorem nec dolor. Cras non odio a turpis pellentesque dictum.

Click the [Blind Editors](#) link to block access to this submission for one or more Editors.  
[Blind Editors](#)

<

Page: 1 of 1 (5 total People Matches)

Display  results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Editor	<a href="#">Merge Me Editor #1</a>	1	0		Yes
<input type="radio"/>	Editor	<a href="#">Merge Me Editor #2</a>	1	0		Yes
<input checked="" type="radio"/>	Editor	<a href="#">Thor Kunkel</a>	3	0		Yes
<input type="radio"/>	Editor	<a href="#">Pippa Oppenheim</a>	10	0		Yes

Page: 1 of 1 (5 total People Matches)

Display  results per page.

# Reassign Open Editor Assignments

The previous Editor will be identified on all reassigned submissions that they had previously handled.

Action	Propo Manu: Num	Editor Originating Proposal	Handling Editor	# of Authors Invited	# of Authors Assigned
<a href="#">Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Edit Proposal</a> <a href="#">Unassign Editor</a> <a href="#">Invite Authors</a> <a href="#">View Related Submissions</a> <a href="#">Set Final Disposition</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Scopus - Title Search</a>	LAURE D-17-0	Thor Kunkel	Thor Kunkel was: Pippa Oppenheim	3	3
<a href="#">View Proposal</a> <a href="#">Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Edit Proposal</a> <a href="#">Unassign Editor</a> <a href="#">Invite Authors</a> <a href="#">View Related Submissions</a> <a href="#">Set Final Disposition</a>	LAURE D-17-0	Lauren Oppenheim	Lauren Oppenheim	4	4

Blinded Editors: [Blinded Editors](#)

### Editors

**Name:** Thor Kunkel [Proxy]  
was: Pippa Oppenheim

**Role:** Editor

**Date Assigned:** Dec 29, 2017

**Date Completed:**

**Elapsed Days:** 10

**Recommendation:**

---

### Reviewers

**Name:** Elmer Gantry (Reviewer) [Proxy]

**Review Status:** Agreed to Review

**Date Reviewer Invited:** Dec 29, 2017

**Date Reviewer Agreed:** Dec 29, 2017

**Date Review Due:**  (mm/dd/yyyy)

# **MORE Editor Assignment**

## **Editor Assignment Functionality**

Grand Ballroom

Friday, 10:25 - 11:25

A deep dive into assignment options such as Editor Chains, Suggest Editor and Editor Substitution.

# Additional Manuscript Details Merge Fields

New custom merge fields will pull AMD descriptions and their values into Letters sent out from EM.

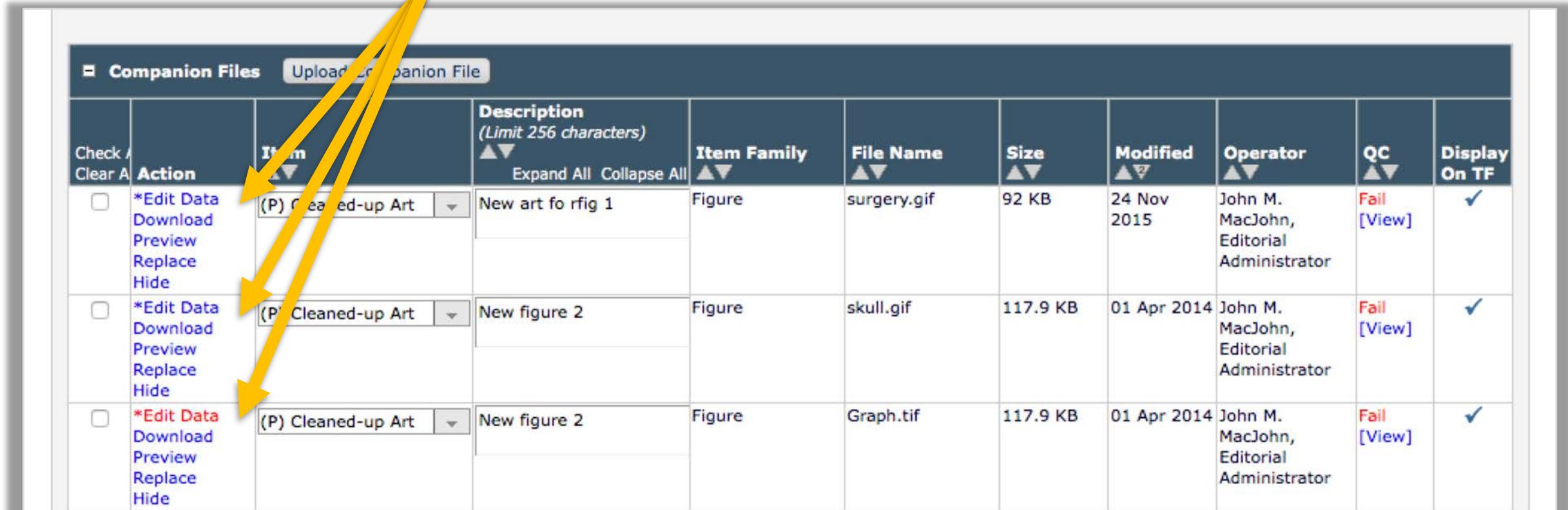
De-select the 'Hide' checkbox in the Merge Fields row to allow two merge fields for this Additional Manuscript Detail field to be available for use in letters. Then enter a label to identify these merge fields, which the system will use to create the merge field names. These merge fields will pull the Field Description and its Value for the current manuscript into a letter.

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	This is the help text for the AMD field on the AMD page. DOES THIS SHOW UP?
Manuscript Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	this is the help text for the AMD field on the Manuscript Details page.
<i>Part of table omitted</i>				
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	This is the help text for an AMD field for the number of text pages in a manuscript.
	Custom Metadata ID: <input type="text" value="AMD_CMI_Text-Pages-1"/> <a href="#">Select Custom Metadata ID</a>			
Merge Fields	<input type="checkbox"/>	N/A	N/A	N/A
	Merge Field Label: <input type="text" value="TEXT_PAGES"/> <i>Maximum 256 alphanumeric characters and underscores allowed, no spaces</i>			

# Submission Item Enhancements

Item Type Metadata will now apply to Companion Files.

- Can be supplied by Authors during submission.
- Can be supplied by Editors uploading Companion Files.
- Submission File Metadata can be edited by Editors from File Inventory after submission.



Companion Files <span>Upload Companion File</span>										
Check / Clear All	Action	Item	Description (Limit 256 characters) Expand All Collapse All	Item Family	File Name	Size	Modified	Operator	QC	Display On TF
<input type="checkbox"/>	<a href="#">*Edit Data</a> <a href="#">Download</a> <a href="#">Preview</a> <a href="#">Replace</a> <a href="#">Hide</a>	(P) Cleaned-up Art	New art fo rfig 1	Figure	surgery.gif	92 KB	24 Nov 2015	John M. MacJohn, Editorial Administrator	Fail <a href="#">[View]</a>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">*Edit Data</a> <a href="#">Download</a> <a href="#">Preview</a> <a href="#">Replace</a> <a href="#">Hide</a>	(P) Cleaned-up Art	New figure 2	Figure	skull.gif	117.9 KB	01 Apr 2014	John M. MacJohn, Editorial Administrator	Fail <a href="#">[View]</a>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">*Edit Data</a> <a href="#">Download</a> <a href="#">Preview</a> <a href="#">Replace</a> <a href="#">Hide</a>	(P) Cleaned-up Art	New figure 2	Figure	Graph.tif	117.9 KB	01 Apr 2014	John M. MacJohn, Editorial Administrator	Fail <a href="#">[View]</a>	<input checked="" type="checkbox"/>

# Submission Item Enhancements

Files can be renamed on download from File Inventory or Assignment Files

- Files renamed at download and production task transmittal
- File names can be edited manually
- “File Reference” is used in the file naming

## Define File References for Manuscript Number: JXYZ14 Anne A. Author (UNITED KINGDOM): "Building additional files onto a submission."

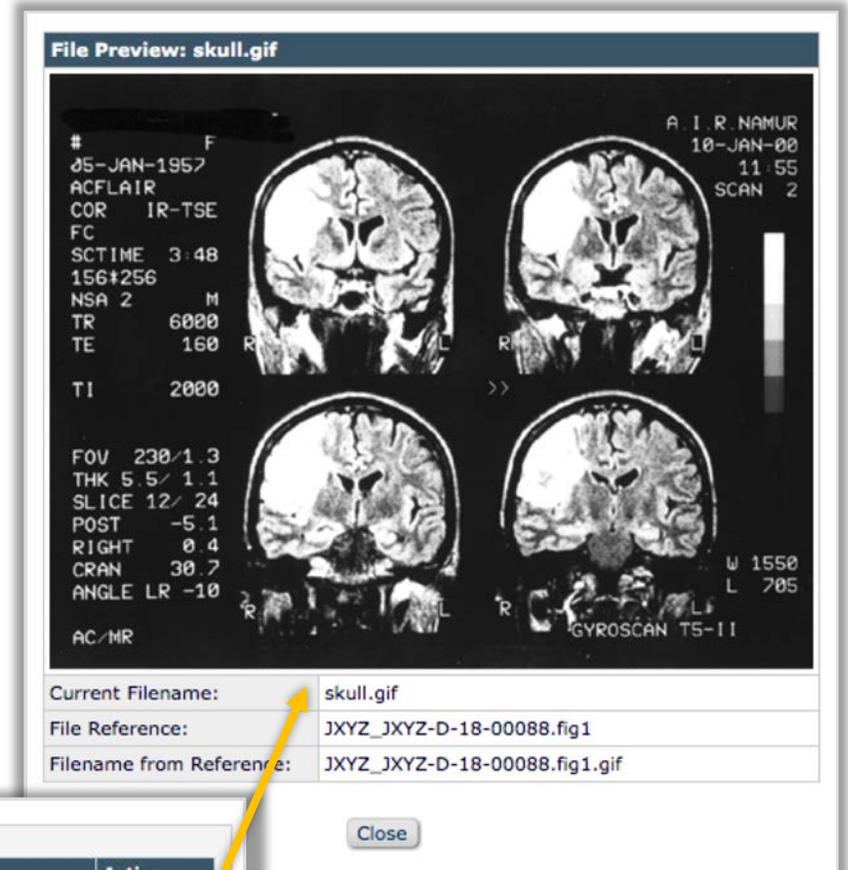
Define new values for File References below. Select the 'Auto' checkbox to generate a default value or drag an XML Reference to copy it. [\(more...\)](#)

File Name	Current File Reference	Item Type	New File Reference
FredSmith1988.docx		Main Manuscript	<input type="text"/>
surgery.gif 	JXYZ_JXYZ-D-18-00088.fig1	Figure	<input type="text" value="JXYZ_JXYZ-D-18-00088.fig1"/>
schema1.gif 	JXYZ_JXYZ-D-18-00088.fig2	Figure	<input type="text" value="JXYZ_JXYZ-D-18-00088.fig2"/>
FredSmith1988_Fig1Rev.tiff 		Figure <input type="text" value="Figure"/>	<input type="text"/>
Smith1988_p3ReplacementFig.tiff 		Figure (inline) <input type="text" value="Figure (inline)"/>	<input type="text"/>
Smith1988_P5Schema_v2.png 		Schema <input type="text" value="Schema"/>	<input type="text"/>
FredSmith1988_p9FullPageFig.jpeg 		Figure <input type="text" value="Figure"/>	<input type="text"/>
JXYZ_JXYZ-D-18-00088.fx2 		Figure (inline) <input type="text" value="Figure (inline)"/>	<input type="text"/>

# Submission Item Enhancements

System creates previews for uploaded image files

- PM and TM only; accessible from task-related pages
- Available via new 'preview' links
- Legacy images converted on demand



Assignment Files								
Color Code	Item	Description	File Name	Last Modified	Date Last Downloaded	QC Results	Action	
	Figure	Figure	AQCTest-1b.ppt	06 Dec 2013		Pass with Warning [View]	Download	
	Figure	Figure	AQCTest-3.ppt	05 Dec 2013		Pass [View]	Download	
	(P) Cleaned-up Art	testing and adding companion files	Table 1.tif	11 Sep 2018		AQC Error	Download Preview	
<a href="#">Change Color</a>								
	(P) Cleaned-up Art	More testing	skullB.gif	29 Nov 2018		AQC Error	Download Preview	
<a href="#">Change Color</a>								

[Download Zip File](#)

# Production Tracking – Enterprise View

Production tracking in ProduXion Manager (PM) follows the Editorial Manager model of “one journal, one site”. This means the Production Tasks menu provides searching and visibility to submissions and tasks on the single journal level. However, many users involved in the production process work across publications, especially those managing the work.

**SOLUTION: Provide a Cross-Publication Production Tasks menu that combines submissions and tasks from multiple PM sites, so that the user can log in to one site to perform tasks assigned to them from any PM site, and/or to manage submissions in production across the PM sites.**

# Enterprise View

- Contains links and folders that combine all pubs that a user can access
- Quick Searches are saved searches that can include results from across pubs
- To Do List has all tasks assigned to logged-in user across all pubs

The screenshot displays the 'Enterprise View' interface. At the top, there are four navigation tabs: 'Editorial', 'Proposal Menu', 'Production Tasks', and 'Enterprise View'. The 'Enterprise View' tab is active. Below the tabs, the interface is divided into several sections:

- Enterprise View Search:** A search bar with the text 'Search Submissions'.
- Enterprise View To-Do List:** A list of tasks assigned to the user, including 'Submission Tasks Assigned to Me (22)' and 'Schedule Group Tasks Assigned to Me (2)'. This section is highlighted with a yellow border.
- Reports:** A section titled 'Cross-Publication Enterprise Analytics Reporting'.
- Managing Editor Enterprise View Menu:** A sidebar menu on the left containing 'Quick Searches:' and a list of saved searches: '16018', 'Andrew Journal with test submissions', 'Batch Assignment Workflow test', 'Corresponding Production Editor First Name is containing 'a'', and 'EditorMenu'. This menu is also highlighted with a yellow border.

A yellow arrow points from the 'Enterprise View To-Do List' section to the 'Quick Searches:' section in the sidebar menu.

# EV Folders

EV folders take the existing PM folders and enhance them with:

- Publication Code filter to refine the result set by publication
- New Publication Code column to easily identify which site the task belongs to

Quicklinks ▼ Collapse

Submission Tasks Assigned To Me

Page: 1 of 1 (22 total submissions) 25 results per page. ⚙

Action	Publication Code	Manuscript Number	DOI	Author Name	Article Title	Production Status	Production Task	Date Task Assigned	Date Due
<a href="#">Go To Task</a>	SERGEIDEV16018	AmyDev-140-17-018	2017spring/Am 140-17-018.1	Colorado Avalanche	MDV_31082_100	New in Production	Task#2	Mar 20 2017 03:06PM	Mar 20 11:59
<a href="#">Go To Task</a>	SERGEIDEV16018	AmyDev-140-17-017	2017spring/Am 140-17-017.1	Marino Zerial	MDV_31082_001	New in Production	JATS1.1A Export Task	Mar 14 2017 02:39PM	Mar 20 11:59
<a href="#">Go To Task</a>	SERGEIDEV16018	AmyDev-131-16-005	AmyDev131012	Amy R. Author, MBA	ΔLack of Spatial Subdivision for the Snapper Lutjanus purpureus (Lutjanidae - Perciformes) from Southwest Atlantic Based on Multi-Locus AnalyseαβσΩΦ®	New in Production; Batch Task Assigned	Batch Submission Task	Oct 11 2016 11:44AM	Oct 14 11:59
<a href="#">View Assignment Letter</a> <a href="#">Assignment Files</a> <a href="#">Submit Task</a> <a href="#">Reassign Task</a> <a href="#">Assign Production Task</a> <a href="#">Assign to Schedule Group</a> <a href="#">Production Details</a> ▾ <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">Edit Submission</a> <a href="#">Send E-mail</a>	VIJAYDEV16018	AmyTest-81-10-283	chrisdev91.116	Mary m Genius Mary, PhD, MD	1234	New in Production	Spec 11.0-39 NLN 3.0 include Orcid	Dec 05 2013 01:46PM	Dec 05 11:59

# Taking Action from EV Folders

- Full set of Action links for the records on the current site
- A 'Go To Task' link to carry out actions on other publications

Quicklinks ▼ Collapse

**Submission Tasks Assigned To Me**

?
Show: Enterprise View
SERGEIDEV16018
VIJAYDEV16018

Page: 1 of 1 (22 total submissions) 25 results per page. ⚙

Action	Publication Code	Manuscript Number	DOI	Author Name	Article Title	Production Status	Production Task	Date Task Assigned	Date Due
Go To Task	SERGEIDEV16018	AmyDev-140-17-018	2017spring/Am140-17-018.1	Colorado Avalanche	MDV_31082_100	New in Production	Task#2	Mar 20 2017 03:06PM	Mar 21 11:59
Go To Task	SERGEIDEV16018	AmyDev-140-17-017	2017spring/Am140-17-017.1	Marino Zerial	MDV_31082_001	New in Production	JATS1.1A Export Task	Mar 14 2017 02:39PM	Mar 21 11:59
Go To Task	SERGEIDEV16018	AmyDev-131-16-005	AmyDev131012	Amy R. Author, MBA	ΔLack of Spatial Subdivision for the Snapper Lutjanus purpureus (Lutjanidae - Perciformes) from Southwest Atlantic Based on Multi-Locus AnalyseαβρσΩΦ®	New in Production; Batch Task Assigned	Batch Submission Task	Oct 11 2016 11:44AM	Oct 14 11:59
<a href="#">View Assignment Letter</a> <a href="#">Assignment Files</a> <a href="#">Submit Task</a> <a href="#">Reassign Task</a> <a href="#">Assign Production Task</a> <a href="#">Assign to Schedule Group</a> <a href="#">Production Details ▾</a> <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">Edit Submission</a> <a href="#">Send E-mail</a>	VIJAYDEV16018	AmyTest-81-10-283	chrisdev91.116	Mary m Genius Mary, PhD, MD	1234	New in Production	Spec 11.0-39 NLM 3.0 include Orcid	Dec 05 2013 01:46PM	Dec 01 11:59

# Cross-Publication Batch Task Assignment

- EV supports batch task assignment from EV Search Results
- Users can batch assign tasks in a single workflow cross-publication

### Batch Assign Production Tasks

Please click 'Proceed' for the publication on which you wish to batch assign production tasks.

Publication Code	Publication Name	Submissions Selected	
SALLYDEV151	Sally's Test Site	3	<input type="button" value="Proceed"/>
STACEYDEV151	Stacey's Test Site with a Really Long Journal Name	6	<input type="button" value="Proceed"/>
TONYDEV151	Tony'sTest Site	1	<input type="button" value="Proceed"/>

[Return to Search Results](#)  
[Enterprise View Menu](#)



## **ProduXion Manager Bootcamp**

Olympia

Friday, 1:30 - 2:30

Just starting out with ProduXion Manager, or interested in learning more? This session provides a basic overview and introduction.

## **ProduXion Manager User Group**

Queen Mary

Friday, 10:25 - 12:30

All about PM, this session will cover functionality, feedback, and reporting.

# *LiXuid Manuscript*<sup>TM</sup>

Phase 1: Xtract – Released 2017 – v.15.1

Phase 2: Production-focused XML tools – Released 2019/2020

Phase 3: Moving XML into the peer review workflow – 2020+

# Phase 1 – Metadata Extraction on Submission

- Already released to all customers
- XML used behind-the scenes
  - Word doc part-converted to XML
  - XML used to populate EM
- Part of new submission UI:



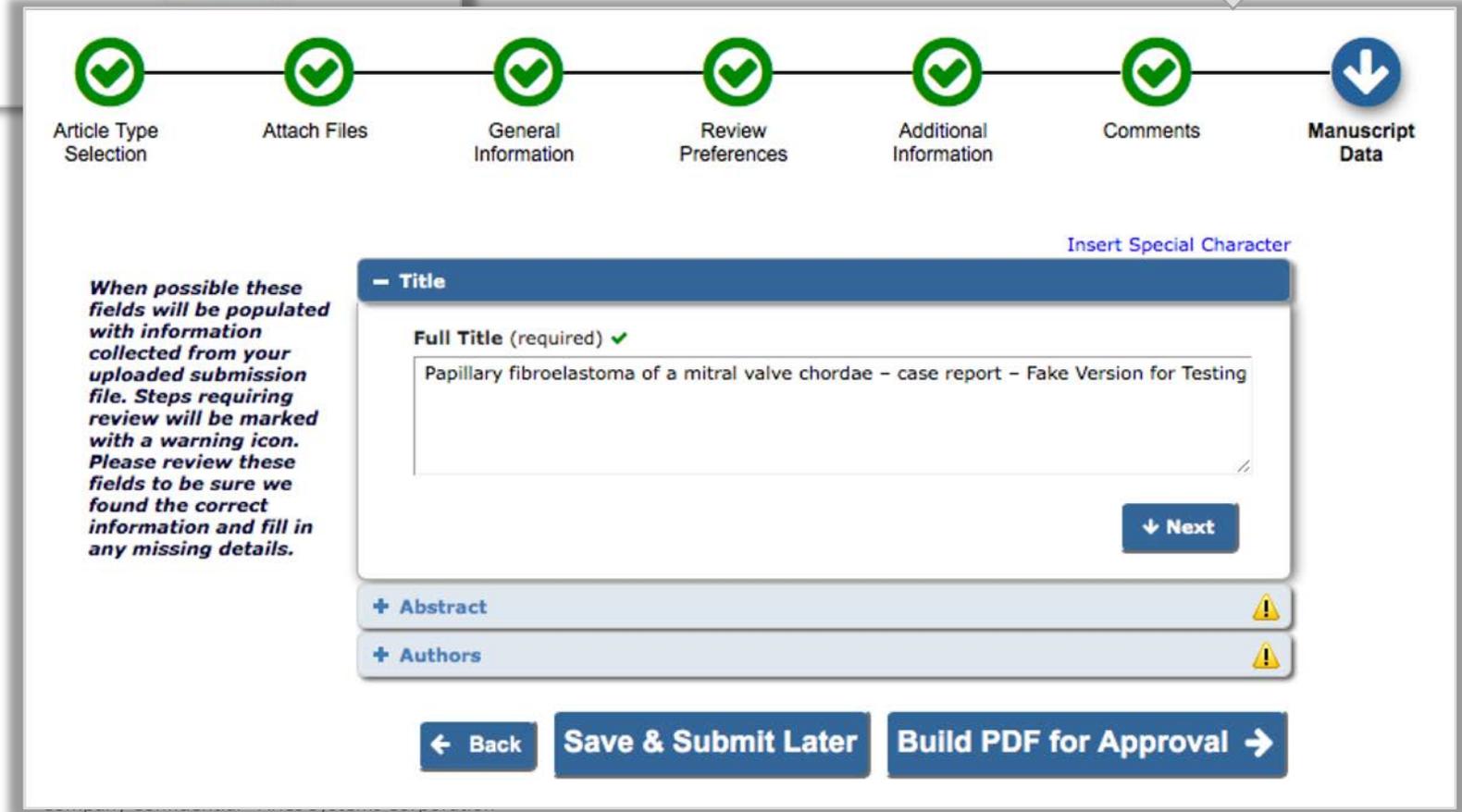
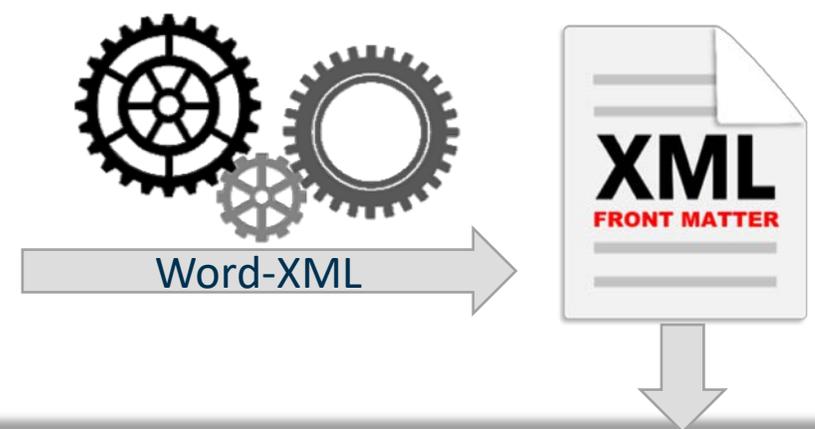
# Phase 1 – Metadata Extraction on Submission

Xtract – uses Inera’s **eXtyles Metadata Extraction**



eXtyles Metadata Extraction “uses artificial intelligence to analyze the unstructured text in the document; accurately extract the article title, author names, affiliations, and abstract; and convert this metadata into richly tagged JATS XML. The submission system can then ingest this XML into its database alongside the manuscript and automatically populate the form fields for these elements.”

[www.inera.com/extyles-products/eXtyles-metadata-extraction](http://www.inera.com/extyles-products/eXtyles-metadata-extraction)



**REMINDER:**

Conversion to XML proceeds while Author completes other information.

EM extracts metadata from converted XML 'front matter' to present to author on the last step.

# Submit Manuscript – Xtract

Keywords will be “Xtracted” in v.16.1

The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with the 'em Editorial Manager' logo and a menu including 'HOME', 'LOGOUT', 'HELP', 'REGISTER', 'UPDATE MY INFORMATION', and 'JOURNAL OVERVIEW'. The user's role is 'Author' and the username is 'call'. A language dropdown is set to 'English'. A red banner below the navigation bar reads: 'Important Message: Site under development. Do not use for live manuscript submission.' Below this, a progress bar shows seven steps: 'Article Type Selection', 'Attach Files', 'General Information', 'Review Preferences', 'Additional Information', 'Comments', and 'Manuscript Data'. The 'Manuscript Data' step is highlighted with a download icon. A yellow box highlights a 'New Keywords Found' notification. The notification text states: 'Editorial Manager has identified new Keywords in your uploaded manuscript file. Please review the new and existing Keywords below. Click the 'Use New Keywords' button to update the Keywords or click the 'Use Existing Keywords' button to retain the previously entered Keywords. You will be able to manually edit the selected value if necessary.' Below the text are two buttons: 'Use Existing Keywords' and 'Use New Keywords'. Under 'Use Existing Keywords' is a text box containing 'One; two three; four'. Under 'Use New Keywords' is a text box containing 'Eén; twee; drie; vier'. At the bottom of the interface are three buttons: 'Back', 'Save & Submit Later', and 'Build PDF for Approval'.

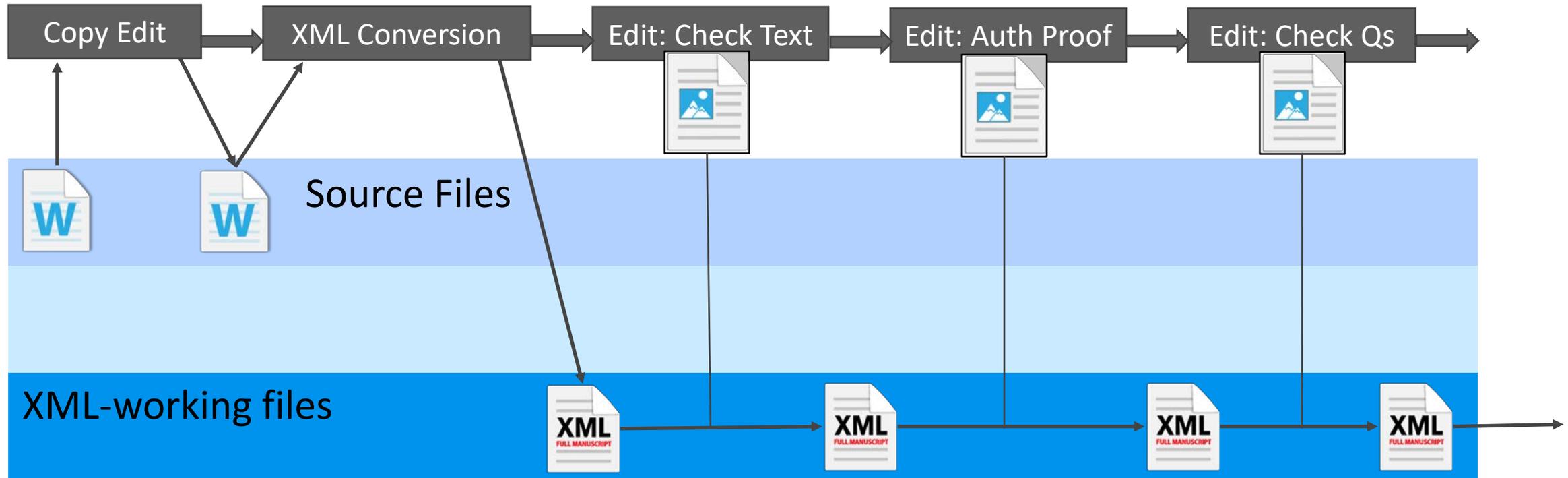
# Phase 2 – Production Focused XML Tools

XML workflow - initiated through “tasks”

- Conversion to JATS XML
- Editing of manuscript in WYSIWYG editor
  - Tracks and Accept/Reject changes, deletions, insertions
- XML edited behind the scenes
- Auto-pagination/composition, auto-redact/tooling, etc.
- XML transforms and export

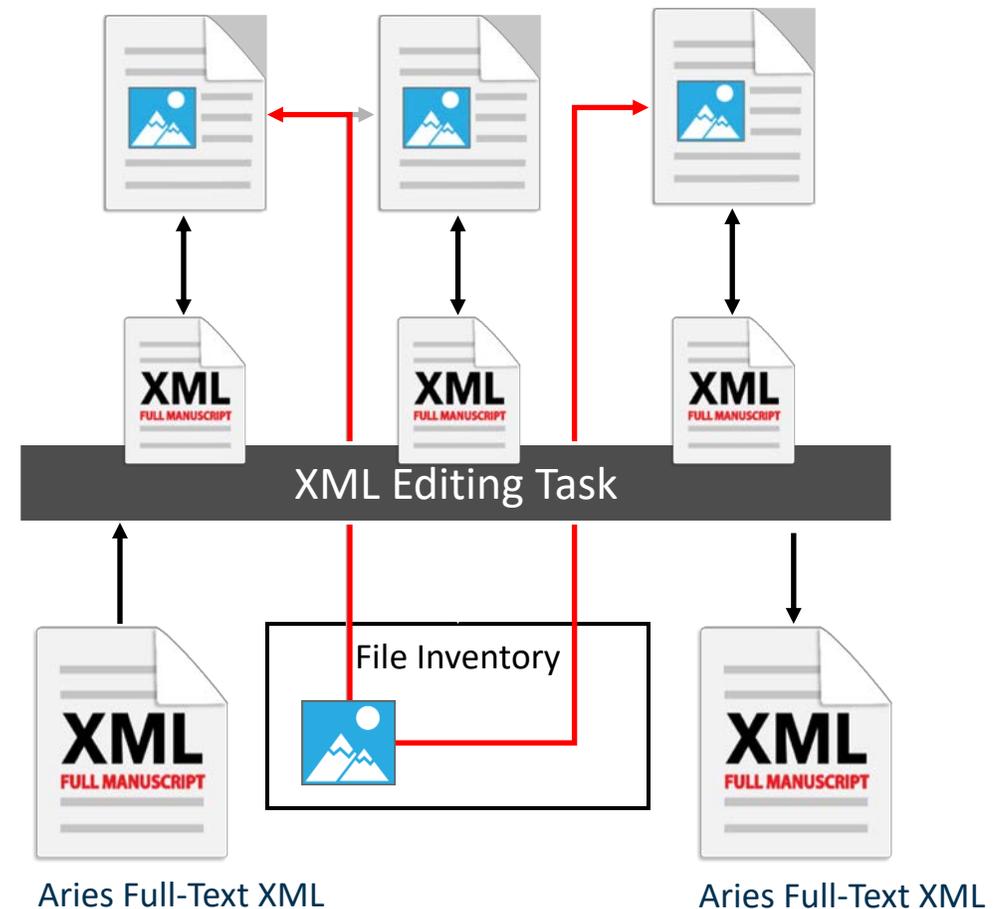


# XML Workflow



# XML Editing Task

- Assign Task to allow recipient to edit the XML text while task is open
- Editing via XML Editor
- User sees Word-Processor like UI
  - Hides the XML
  - In-line maths, tables, figures
- The XML Editor understands XML rules
  - User cannot create 'bad' XML (we use JATS)
  - But can add new elements, not just edit text
- The XML Editor constantly 'validates' the text
- We're adding special tools to help you
  - E.g. Queries to the Author



SECTION

## 2.3 Mutant preparation

Mutants of P1-*scyllo*-IDH containing single amino acid substitutions with alanine (K106A, D191A, H195A, R178A, and H318A) were prepared using a PrimeSTAR mutagenesis kit (Takara Bio, Shiga, Japan) according to the manufacturer's protocol, with pET21a(+)-*lgdA* as the template. The primers used for construction of each mutant genes are shown in [Table 2](#). Mutant enzymes were expressed and purified as described for the wild-type enzyme.

TABLE WRAPPER

Table 2

**Primers used for mutation**

K106A-f	CTGGAAGCGCCCATGGCGCTGAGCGTC
K106A-r	CATGGGCGCTTCCAGCCAGACATGCTT
D191A-f	CTGGCGGCTCTGGGCTGCCATCTGGTC

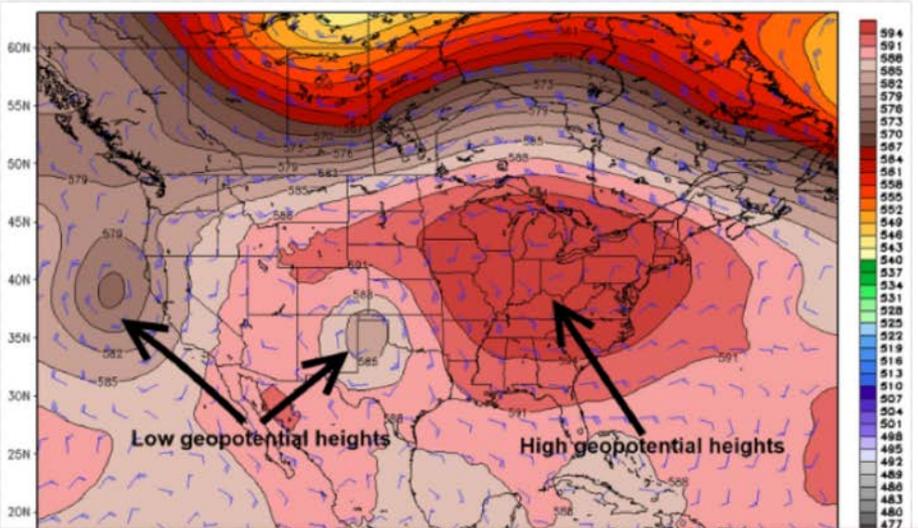
Word  
Processor-like  
Editing  
environment

# Images, tables, and math in-line

flow upstream, leading the cold/dry air to arrive in SC, and converge with the warm/wet air from the edge of the WPSH. Consequently, a persistent precipitation process occurs in SC.

FIGURE  
FIG. 4

Composited 500-hPa geopotential height (contours; every 5 dagpm) and normalized height anomalies (shaded; every 0. 5σ). The vectors indicate wave activity flux (units: m<sup>2</sup>s<sup>-2</sup>). The number above each panel has the same meaning as in [Figure 2](#).



Article > Body > Methods > Section > Paragraph > Equation

Submit HOME SECTIONS INSERT TITLE PAGE

B I U x<sub>2</sub> x<sup>2</sup> More

SECTION

## 2.2 Methods

The precipitation process that persisted for at least three consecutive days are referred to as persistent precipitation process.

The EAP index ( $I_{EAP}$ ) was normally defined based on three key anomaly-center points; namely, the Sea of Okhotsk (OK), the mid-latitudes of East Asia (EA), and the western Pacific (WP), during the EAP regimes ([1](#); [4](#); [9](#); Chen and Zhai, 2014):

EQUATION

$$I_{EAP} = \frac{1}{3}H_{OK} - \frac{1}{3}H_{EA} + \frac{1}{3}H_{WP}$$

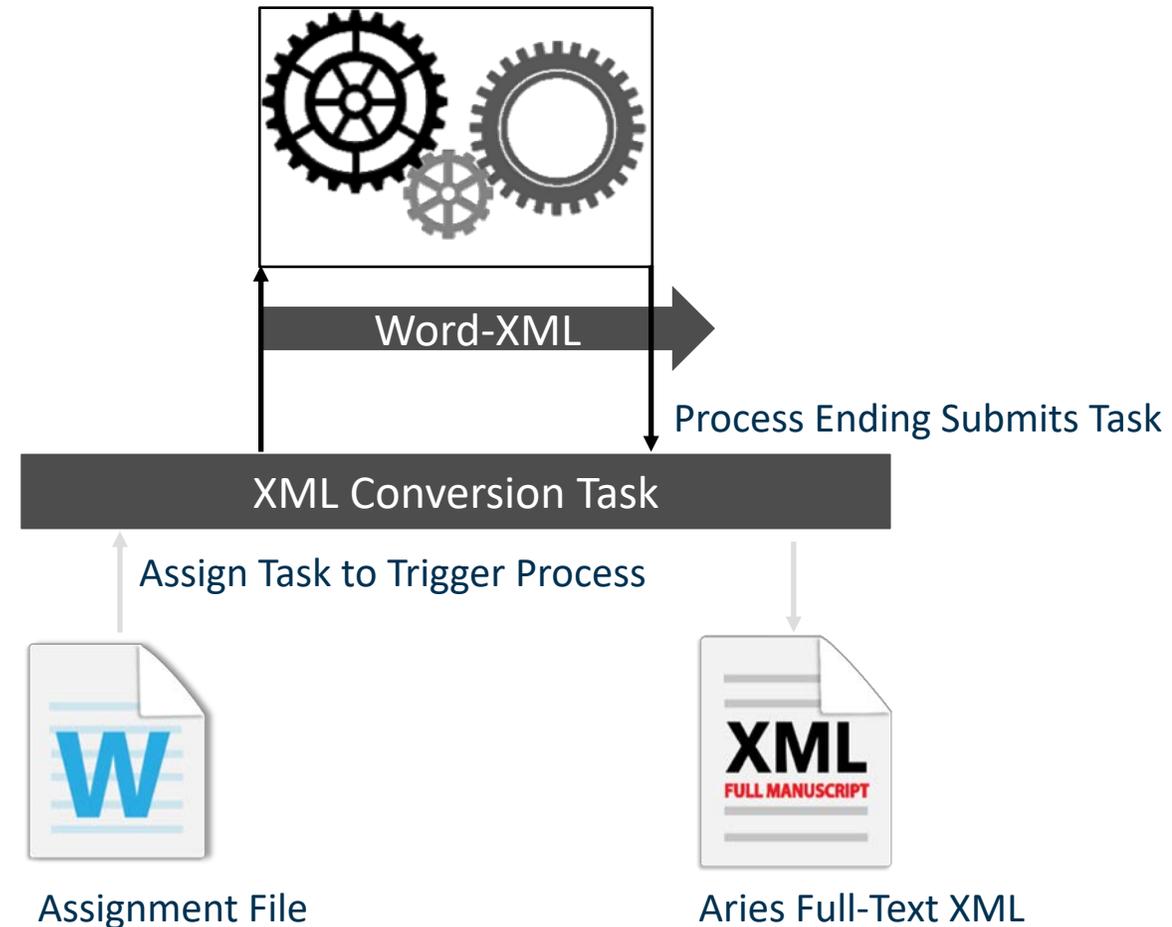
(1)

where  $H_{OK}$ ,  $H_{EA}$ , and  $H_{WP}$  represent the normalized 500 hPa geopotential height anomaly of OK, EA, and WP, respectively. This study is based on the typical EAP teleconnection pattern responsible for no persistent heavy precipitation cases in the YRV in June and July, as identified by [7](#) for the period 1961–2010. The cases are selected by requiring that the normalized domain-averaged daily precipitation in the YRV should be smaller than -1 standard deviation (denoted by  $\sigma$  hereafter), and are referred to as dry YRV EAP cases. At the

Methods > Section > Paragraph > Equation

# Full-Text Conversion Task (Phase 2b)

- Takes a document to convert as the Assignment File
- Software **automatically** converts document to structured XML
  - No template needed
  - Heuristics to deconstruct files with a variety of structures
- On completion of the process, EM/PM automatically “submits the Task”



# What this means...

## BENEFITS

- Greater consistency of the manuscript and metadata
- Manuscript enrichment: taxonomy, reference linking, inline graphics
- Quality check: plagiarism checking, copyediting, reference checking
- Streamlined/single Author platform
- Improved accessibility

RESULT: Improved Author and Production Editor experience; Greater publishing flexibility; Faster time to market; Reduced cost

# LiXuid Phase 3

Full manuscript conversion to JATS XML at submission

Peer review and author revisions takes place in editing environment

XML edited behind the scenes – can be exported at any time

## BENEFITS

- Editor decision making: statistical and methods analysis, reviewer selection, topic relevance, other analytics
- Manuscript enrichment: taxonomy, reference linking, inline graphics
- More intuitive and contextual review
- Improved accessibility

RESULT: Improved Author, Reviewer, and Editor experience; More intuitive peer review process with contextual commenting; Greater publishing flexibility

## **MORE LiXuid**

### **XML Bootcamp: What is XML?**

Michelangelo

Friday, 11:30 - 12:30

A basic, beginner-level overview of XML and its role in scholarly publishing.

### **Update on LiXuid**

Michelangelo

Friday, 1:30 - 2:30

Hear more about the forthcoming features of LiXuid Manuscript.



**Questions?**  
Thank you!

**Tony Alves**  
Director, Product Management  
[Orcid.org/0000-0001-7054-1732](https://orcid.org/0000-0001-7054-1732)