

# Welcome to PMUG 2016



 **ProduXion Manager<sup>®</sup>**  
[www.ariessys.com](http://www.ariessys.com)

  
**Aries**  
systems  
Publish Faster. Publish Smarter.

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# AGENDA

## Overview of Upcoming Administrative Improvements

### Workflow Discussion:

- Automation Configuration Review
- Production Status Grid
- Scheduling
- Production Statuses
- Issue Makeup
- YOUR QUESTIONS, EXPERIENCES, SUGGESTIONS

## Production Tracking Reporting Basics

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# Version 12.2

**General Release Begins February 2016**

# Version 13.0

**Beta scheduled to begin March/April 2016**

**Upgrades July/August 2016**

# Version 13.1 **TENTATIVE AND SUBJECT TO CHANGE**

**Beta to begin September/October 2016**

**Upgrades January/February 2017**

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## Flag History (12.2)

Many publications use flags to indicate that an “outside” process has started or is underway


It would be useful to track time spent on these various activities


**SOLUTION: The system will keep track of Flag actions**

- **Date Flag is turned on and off**
- **Operator who turned flag on and off**
- **Number of days flag was turned on**
- **Available in *History*, via *Details* and from *Set Flags* page**
- **RoleManager Permission required to view history**

# Flag History (12.2)

Each Submission Flag has its own “Display in History” setting

**Flag Icon:** 

**Original Flag Icon:** 

**Flag Name:**  [Insert Special Character](#)  
Maximum 256 characters

**Flag Type**  
 Editorial  
 Production

**Associate with AMD Field**

**Display in History** When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.

**Hide** When you hide a flag, the flag cannot be turned on for new submissions, but will continue to display on existing submissions (until it is turned off by a user with appropriate permission).

**Turn off flag throughout the system** When you turn off a flag throughout the system, the flag will be removed from all submissions to which it was attached.



## Flag History (12.2)

Submission Flag History is accessed from:

- *Status History* (Editorial and Production)
- *Correspondence History* (Editorial and Production)
- *Set Submission Flag* page
- *Flag Legend* page

SUBMISSION FLAG HISTORY							
Flag	Flag Name	Revision	Date Turned On	Operator	Date Turned Off	Operator	Days
<input checked="" type="checkbox"/>	Subscan Complete	1	Jan 28, 2015 3:35 PM	James Miller, PhD			(6)
!	Potential Subscan Issue	1	Jan 25, 2015 2:00 PM	James Miller, PhD	Jan 28, 2015 11:12 AM	Stacey Lavelle	3
2	Ed Office, Rebecca Bye	1	Jan 25, 2015 11:40 AM	Rebecca Bye			(9)
🌀	Open subscan discussion	1	Jan 16, 2015 8:29 AM	Xianchun Wang, PhD	Feb 3, 2015 12:00 PM	Xianchun Wang PhD	18
!	Potential Subscan Issue	0	Dec 17, 2014 2:00 PM	James Miller, PhD	Dec 23, 2015 11:12 AM	James Miller, PhD	6
🌀	Sent Back to Authors	0	Nov 13, 2014 10:13 AM	Rebecca Bye	Nov 18, 2014 11:00 AM	Rebecca Bye	5

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## Letter Improvements (12.2)






People want a quick way to send informal reminders and follow ups, particularly while in *Details*.

**SOLUTION: Send Ad Hoc Email from *Details* – icon appears next to names**

- Clicking icon opens *Customize E-Mail* page
- Recipient and sender fields auto-populate
- Subject, cc, bcc and body are empty
- Ad Hoc letter compliant merge fields can be used
- Attachments are allowed
- Saved in *Correspondence History*

# Letter Improvements (12.2)

Send Ad Hoc Email from *Details* – icon appears next to names

Production Tasks	
<b>Description:</b>	Copy Edit
<b>Production Task Status:</b>	Completed
<b>Assigned To:</b>	 <a href="#">Kim Baddeley</a>  [Proxy]
<b>Date Assigned:</b>	Jun 7 2007 12:14PM
<b>Date Task Due:</b>	Jun 18 2007 11:59PM
<b>Completed</b>	Jun 7 2007 12:21PM
<hr/>	
<b>Description:</b>	Check Artwork
<b>Production Task Status:</b>	Open
<b>Assigned To:</b>	 <a href="#">John Smith</a>  [Proxy]
<b>Date Assigned:</b>	Dec 9 2015 5:18PM
<b>Date Task Due:</b>	<input type="text" value="12/11/2015"/>  (mm/dd/yyyy)
<b>Elapsed Days (since</b>	27



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## Letter Improvements (12.2)

Email correspondence is a major element of EM/PM and sending compelling and visually appealing letters can assist in getting attention and increasing compliance.

Current HTML letter configuration required knowledge of HTML mark up.

**SOLUTION:** A new tool that allows letter editing using rich text formatting is added to letter templates and editing screens.

# Letter Improvements (12.2)

From: "Mary Smith" <trash1@ariessc.com>

To: **Richard Wynne**

Letter Purpose: Assign Production Task

Letter Subject:

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

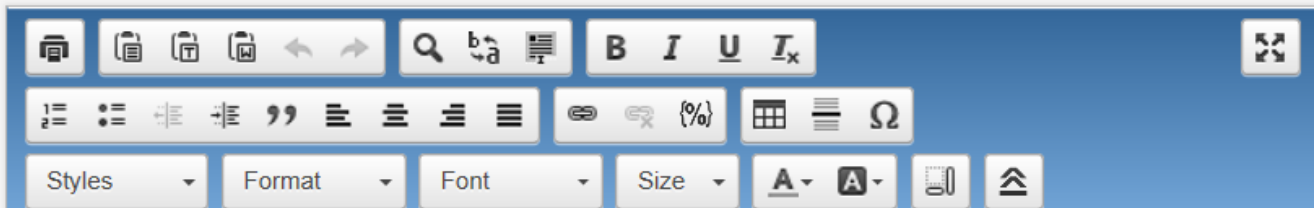
cc:

bcc:

Letter Body:

[Preview Letter](#)

[Open in New Window](#)



Dear %PRODTASK\_ASSIGNEDTO% ,

Please complete the %PRODTASK% for Enter submission metadata below by %  
PRODTASK\_DUE\_DATE%.

Please remember to %PRODTASK\_INSTRUCTIONS%.

Thanks!

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## Customizable Grids (12.0)

Editors want more control over how manuscript lists are displayed in their folders

**SOLUTION:** replace current static grids with new customizable grids:

- Reorder columns
- Hide columns
- Resize columns
- Freeze columns
- Fixed header

Grids with highest visibility and utility will be refactored first – Search Submissions was refactored in version 12.0.

# Power Grid Expansion (12.0)

Quicklinks

## View All Assigned Submissions - Mary François Smith, PhD



**Contents:** This page lists all submissions that have been assigned to an Editor, for which the Editor's decision has not yet been made. This includes submissions with invited Reviewers, submissions out for review, submissions requiring a decision, and submissions which have a subordinate Editor's decision but not a decision from the top Editor in the decision-making chain.

Page: 1 of 2 (179 total submissions)

1 2

100 results per page.

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor with Current Responsibility	Review Status	Editor Decision
<a href="#">Action Links</a> (30%)	DEMO121-D-15-00003	Original Research	Testing Optional URI	Mary François Smith PhD	Sep 14 2015 1:56PM	Sep 16 2015 10:06AM	Received by Editor	Dave Lister		
<a href="#">Action Links</a> (63%)	DEMO-D-05-00025R1	Original Research	Demonstration of Edit Submission	Anthony Author MD	Jun 17 2005 11:00AM	Sep 16 2015 9:58AM	Received by Editor	Mary François Smith		Minor Revision
<a href="#">Action Links</a> (64%) (60%)	DEMO120-D-15-00002	Original Research	Reference checking example 6-17-2015	Mary François Smith PhD	Jun 17 2015 4:47PM	Jun 17 2015 4:51PM	Reviewers Assigned	Edward Editor	1 Invited - No Responses (more...)	
<a href="#">Action Links</a> (12%)							Reviewers Assigned	Aries Wagoneer	1 Complete David John Barker - Major Revisions Needed 2 Total Required	
<a href="#">Action Links</a> (32%)							Reviewers Assigned	Mary François Smith	1 Declined (more...)	
<a href="#">Action Links</a>							Reviewers		1 Invited - No Responses	

### Grid Options

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

Column Header	Fixed	Show
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manuscript Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Article Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Author Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Initial Date Submitted	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Status Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Current Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Editor with Current Responsibility	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Review Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Editor Decision	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Section/ Category	<input type="checkbox"/>	<input type="checkbox"/>

Cancel

Submit



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## Power Grid Expansion (12.2)

Grid configuration will be saved for a Saved Search – this means that results for Saved Searches can have layouts that are best suited to the purpose of the search

- Different Saved Searches can have different Result Layouts
- Shared Saved Searches can have custom Result Layouts
- Subsequent layout changes do not propagate unless saved as new search

# Power Grid Expansion (12.2)

Grid configuration will be saved for a Saved Search

**Managing Editor Main Menu**

Quick Searches:  
[DOI Search](#)  
[Ready for Press Release](#)

**Submissions With:**

0 Reviews Complete 2  
 1 Review Complete

[Search](#)  
[Search Submiss](#)

**Search Submissions - Search Results**

(Press Release Candidate is equal to 'YES' or Press Release Candidate is equal to 'OPTIONAL') or Sub. Target Online Publication Date is within the next 60 days

Page: 1 of 1 (4 total submissions) 1 500 results per page.

Action	Press Release	Article Title	Author Name	Manuscript Number	Article Type	Review Status	Classifications	Current Status	Initial Date Submitted
<a href="#">Action Links</a>		Demonstration for Journal of Neurosurgery	Anthony Author ▾ 1 2	DEMO595R1	Original Research	1 Partial Review Saved 1 Agreed 2 Late (more...)	1: CROPS 1.020: Drug interactions plus 1.110: Steroids 2: AGRICULTURE	Under Review	Oct 24 2006 1:47PM
<a href="#">Action Links</a>		New Manuscript for PAS	Anthony Author ▾ 1 2	DEMO600	Original Research	2 Complete (more...)	1: CROPS 1.020: Drug interactions plus 1.025: Additional Classification 1.030: Another	Reject	Nov 9 2006 10:09AM

# Power Grid Expansion (13.0)

Improved performance – faster and more stable!

Quicklinks

**Production Status Grid**

Show:

Page: 1 of 2 (15 total submissions)      1 2 ▶▶▶      10 results per page.

Action	Manuscript Number	Author Name	Article Title	Production Status	Copyedit	Artwork Correc	Page Layout	Press Release	Review Page I
<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="#">Search Google.com</a> <a href="#">Google Scholar</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMO-D-03-00081R1	Kevin M. Carlson ▾	Pain management	Copyedit Underway; [Not Copyedited]	Due Aug 14 2008 11:59PM Suzie Chapstick		Must Start: Undefined		Must Start: Undefined
<a href="#">Production Details</a> ▾ <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">Assign Production Task</a> <a href="#">Change Schedule Group</a> <a href="#">File Inventory</a> <a href="#">Search Google.com</a> <a href="#">Google Scholar</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMO-D-03-00082	Anthony Author MD ▾	Royal society	Page Layout Underway	Submitted Apr 03 2007 03:42PM Jen Editor		Due Apr 17 2007 11:59PM Jack Lavelle		
<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>	DEMO-D-03-00082R1	Kevin M. Carlson ▾	Contemporary Accounting		Due Sep 02 2008 11:59PM		Must Start: Undefined		Must Start: Undefined

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## Proxy Register Changes (12.2)

Currently in EM/PM Editors are forced to enter minimal data because Editors want a hassle-free way to Proxy Register other users. However, there is often a need to force Editors to enter specific data, like an email or an institution – especially when working with the Create Submission interface.

**SOLUTION: Allow administrators to define requirements for Proxy Registration of users by Editors.**

- Editors can be forced to supply required data
- Required items for Proxy Registration can be different than required items for Self Registration
- Proxy Registration can be completed on a single screen



# Proxy Register Changes (12.2)

## Proxy Register New User

You may register a new user and send that new user a custom Welcome letter, or choose not to send a letter. To begin the Proxy Registration process, please enter the following information:

E-mail Address	<input type="text"/>
If entering more than one e-mail address, use a semi-colon between each address (e.g., joe@thejournal.com;joe@yahoo.com) Entering a second e-mail address from a different e-mail provider decreases the chance that SPAM filters will trap e-mails sent to you from online systems. <a href="#">Read More.</a>	
<b>Required Information</b>	
<b>Personal Information</b>	
Given/First Name *	<input type="text"/>
Family/Last Name *	<input type="text"/>
Preferred Method of Contact *	<input checked="" type="radio"/> E-mail <input type="radio"/> Fax <input type="radio"/> Postal Mail <input type="radio"/> Telephone
Telephone Number *	<input type="text"/> (including country code)
<b>Institution Related Information</b>	
Institution *	<input type="text"/> max 450 characters
Department *	<input type="text"/> max 450 characters
Country *	Please choose a country <input type="text"/>
Address is for (Work, Home, Other) *	<input checked="" type="radio"/> Work <input type="radio"/> Home <input type="radio"/> Other
<b>+ User Information</b>	
<b>+ Enter More Contact Information</b>	

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## Proxy as User after Registering Them (13.0)

An Editor or staff proxy registers a new user, such as a new Associate Editor or a Guest Editor. S/he must then find that new record in Search People in order to proxy in as them to accept an assignment.

**SOLUTION:** New option allows person doing the proxy registering to immediately log in as that new person.

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# Invited Submissions Assigned to Schedule Groups (13.0)

When a Proposal is initiated the editor can assign it to a Schedule Group.

This means that when related invited submissions are received, they will automatically be associated with that Schedule Group.

This assists in the management of Special Issues, Review Journals, and other publications that consist of mostly solicited articles.

# Invited Submissions Assigned to Schedule Groups (13.0)

Article Type:

*Maximum Article Type name is 75 characters.*

Family: Proposal    Invited:     Editor Use Only:

Assign to Schedule Group:

▼  
Hidden  
Optional  
Required

- Hide** When you **Hide** an Article Type will be deactivated (not available for new or revised manuscripts).
- Allow file uploads from arXiv.org server
- Allow file uploads from

## Initiate Proposal

Selecting a Schedule Group is required. Once a Schedule Group has been selected, information from that Schedule Group will be displayed automatically, and Proposal creation can continue. A Schedule Group can be added to the list by clicking the 'Add Schedule Group' link.

* <b>Article Type</b>	<input type="text" value="Proposal for Editorial"/> ▼
* <b>Schedule Group</b>	<input type="text" value="Please Choose a Schedule Group"/> ▼ <a href="#">Add Schedule Group</a>

Cancel

Proceed

# Invited Submissions Assigned to Schedule Groups (13.0)

Edit Schedule Group Details/Add Submissions

Submit Cancel Add Submissions

[additional content removed]

## Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Author Name	Target Number of Pages	Target Start Page	Target End Page
<a href="#">Production Details</a> <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	2	DEMO-15-I-00001	Chapter	Health Maintenance Overview	Richard E. Lyons	11	1	11
<a href="#">+Additional Manuscript Details</a>								
<a href="#">Production Details</a> <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	3	DEMO-15-I-00002	Chapter	Health Maintenance for Infants and Children	Stacey Lacey	15	12	27
<a href="#">+Additional Manuscript Details</a>								

Update TOC Insert Header

## Pre-selected Submissions

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Author Name
<a href="#">Details</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a>		DEMO-15-I-00003	Brief Report	Health Maintenance	Arthur L. Sides
<a href="#">Details</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a>		DEMO-15-I-00004	Original Study	Weight Management	Ebeniezer N. Gr
<a href="#">Details</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a>		DEMO-15-I-00005	Original Study	Fatigue	Janet Swatski
<a href="#">Details</a> <a href="#">Transmittal Form</a>		DEMO-15-I-00006	Original Study	Dizziness	Jocelyn Wipper

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## ORCID iD Authenticate Deep Link (13.0)

Publications need to be sure all of the people in their database are disambiguated so that effective communication can happen between various systems – like peer review, society membership, publishing platforms, granting agencies, repositories, etc.

**SOLUTION:** ORCID

**A new deeplink will allow users to check that their ORCID iD is authenticated, and allow them to get an authenticated ORCID iD if they don't have one.**

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## Register via ORCID (13.1)

Registering on any system is an arduous task, especially if a lot of information is required, and especially when you have already entered the same data in so many other places!

It is overwhelmingly accepted throughout STM publishing that ORCID iD's are a necessary standard that assists in disambiguating people and facilitates system interoperability. Everyone needs to get and use their ORCID iD!

**SOLUTION: Fetch registration data from ORCID to make registration EASIER!**


**Push users to register an ORCID iD and pull that Authenticated ORCID iD into EM/PM!**

# Register via ORCID

## Pre-registration Page

To register to use the Editorial Manager system, please enter the requested information. Upon successful registration, you will be sent an e-mail with instructions to verify your registration.

**Choose a Registration Method**

 Use your ORCID

**Or type in your details:**

First Name\*

Last Name\*

E-mail Address\*

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**WARNING** - If you think you already have an existing registration of any type (Author, Reviewer, or Editor) in this system, please **DO NOT** register again. This will cause delays or prevent the processing of any review or manuscript you submit. If you are unsure if you are already registered, click the 'Forgot Your Password?' button.

If you are registering again because you want to change your current information, changes must be made to your existing information by clicking the 'Update My

**NOTE:** A PolicyManager configuration can force registration via ORCID upon clicking *any* 'Register' action link.



---

# Register via ORCID

The following EM/PM fields are populated on the *Registration* page:

Given/First Name  
Family/Last Name  
Email (possibly multiple)  
Keywords  
Position  
Institution  
Department  
City  
State or Province  
Country

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## Trigger APC API – Payment Due in Production Tracking (13.0)

Publications using the APC API to collect OA fees are also interested in using the same mechanism to collect other sorts of fees, such as page charges, color charges, reprints, etc. Relevant data for some of these items are often not available until the production process is underway.

**SOLUTION: The APC API is enhanced to allow publications the freedom to charge multiple fees during the production process.**

Production Tasks are used to trigger fee requests.

# Trigger APC API – Payment Due in Production Tracking

## Configure APC Processing

Select an **Editorial** Event to Trigger the Publication Charges Payment Due **Event**

Notify Author of selected decision(s):

Please select Decision Term(s)

Accept

Revise

Revise, No Review

Set the Final Disposition to 'Accept', 'Accept and Transmit' or 'Accept for Extraction'

None (Publication Charges Payment Due must be triggered by assigning a Submission Production Task)

**NOTE:** If an Editorial event IS selected to trigger the initial call, subsequent Payment Due calls MAY be triggered as Submission Production Tasks.

# Trigger APC API – Payment Due in Production Tracking (13.0)

## Edit Submission Production Task

Cancel

Submit

[Insert Special Character](#)

New Production Task Name:

Trigger Publication Charges Due

*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

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assigner and a specific user to receive the task. You should also configure

*Part of page omitted*

Production Task Assignment can be configured to also trigger a Publication Charges Payment Due letter and associated status change; this may be in addition to the initial trigger that occurs when the Author is notified of a selected decision or when the Final Disposition is set to Accept.

- Trigger 'Publication Charges Payment Due'

Letter Options:

Trigger all ActionManager 'Publication Charges Payment Requested' letters

Send following letter to the Corresponding Author only

Please Choose a Letter



Do not trigger if APC Status is already 'In Process' or 'Complete'

Do not trigger on repeated assignment of this Task

# Trigger APC API – Payment Due in Production Tracking (13.0)

## Configure Submission Workflow

This workflow contains the master list of all defined Submission Production Tasks, and is the default workflow initially associated with all Article Types.

Use 'Add New Task Type' here to add a new Submission Production Task Type to the system for use in all Workflows. Unused Task Types may also be removed from the system using the remove icon (🗑️). The Task Order defined here applies primarily to this workflow alone, but is also used by the Production Status Grid.

The [Edit] link modifies the master Task Type configuration, affecting all workflows. The edit icon (✍️) modifies Automatic Task Assignment settings affecting only this workflow (you must first configure the Task Type to allow Automatic Task Assignment when Trigger Tasks are submitted).

Workflow Name:

Order	Task Type (↔=Milestone)	Assign if First Task	Trigger Publication Charges	Trigger Task(s)	Allow Repeats
<input type="text" value="1"/>	Copy Edit <a href="#">[Edit]</a>	<input checked="" type="checkbox"/>			
<input type="text" value="2"/>	Edit Graphics <a href="#">[Edit]</a>		<input checked="" type="checkbox"/>	Copy Edit	<input checked="" type="checkbox"/>
<input type="text" value="3"/>	Composition <a href="#">[Edit]</a>		<input checked="" type="checkbox"/>	Composition	
<input type="text" value="4"/>	Author Proof <a href="#">[Edit]</a>	<input checked="" type="checkbox"/>			
<input type="text" value="5"/>	Final Files to Print <a href="#">[Edit]</a>		<input checked="" type="checkbox"/>		
<input type="text" value="6"/>	Final Files to Online Posting <a href="#">[Edit]</a>		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	◆ Trigger Publication Charges Due <a href="#">[Edit]</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Final Files to Online Posting	<input checked="" type="checkbox"/>

Maximum Production Task Name is 100 characters

NOTE: Automated workflows can have tasks that trigger the “Payment Due” APC call.

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## APC API Can Include Data from Additional MS Details Fields

Publications using the APC API to collect OA fees sometimes need to pass non-standard information along to the payment system. For example, there may be a society membership number that allows for a discount.

**SOLUTION:** The APC API can include data collected via AMDs. This allows for the collection on non-standard data to be passed to third party payment systems.

# APC API Can Include Data AMDs

## Add Additional Manuscript Detail Field

Cancel Submit

Field Description:

[Insert Special Character](#)

Publication Charges Field

Maximum 256 characters



Include in Publication Charges Metadata (Please enter a Custom Metadata ID below)

Field Type:

Text

Maximum Field Length:

(A value from 1 to 200)

Default Value for Field:

If 'None' is selected, an empty text box

None

Single Value (enter value below)

*Part of page omitted*

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Transmittal Form				
Custom Metadata ID: <input type="text" value="B_456-789"/>				
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	

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## Import from S1 to EM/PM (13.0)

Publishers use different systems for different publications and for different processes.

Some publishers wish to transfer (cascade) submissions between two publications that use different editorial systems.

Some publishers use S1 for editorial, but PM for production tracking.

**SOLUTION:** Publishers can import submission data and files from a ScholarOne site to either Editorial Manager or Production Manager using XML compliant with the Cadmus DTD.



---

## Import from S1 to EM/PM (13.0)

Manuscripts can be transferred from a publication using ScholarOne to another publication using ProduXion Manager:

- For transfer to PM, submission is imported with a Final Disposition of “Accept” and with production initiated
- XML compliant with the Cadmus DTD version
- S1 import works alongside other imports, such as Ingest and transfer from other EM publications
- Contact your support rep to enable

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## Hide “Preferred Method of Contact” (13.1)

Some publications do not want to give users an option to select a Preferred Method of Contact other than email.

**SOLUTION:** Publications can set Preferred Method of Contact to “hidden”, thus making email the only preferred method, as well as making email a required field.

**NOTE:** Users who have already identified something other than email as their preferred method of contact, and who have not entered an email address, will continue to have their preference enforced. However, they will no longer see the Preferred Method of Contact setting when they go to update their record, and they will be forced to enter an email address when submitting that page.

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## Excluding People from Reminders (13.1)

Sometimes a particular user asks not to receive reminder emails. It is within the publication's interest to heed this request and exclude the user when sending reminders.

Sometimes a user will let an editorial office know that they will soon submit a task. The editorial office then wants to be sure that no reminder gets sent to that person.

This is easily handled when sending manual reminders – but not possible when automated reminders are configured.

**SOLUTION:** A new checkbox in a user record excludes a user from receiving automated reminder emails.

# Excluding People from Reminders (13.1)

## Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

### John Adams

Self-Registered:  
Jun 21 2005 10:54AM

Last Modified:  
Jun 21 2005 10:54AM

Inactivate this User

Send Login Details

- Exclude this user from receiving all batch and reminder emails:
  - Always
  - When Unavailable Dates are active

*(Enabled by Mark Watney, Managing Editor, Oct 13, 2015)*

### User Information

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

User Name \*

Password \*

[Password Rules](#)

Default Login Menu

Available as a Reviewer?

Yes  No

Board Member?

Yes  No

Forbidden as a Reviewer?

Yes  No

Reviewer Role \*

Publisher Role \*

Editorial Role \*

Editor Description

Activity Details

### Personal Information

Title

(Mr., Mrs., Dr., etc.)

Given/First Name \*

Secondary Given/First Name

# Excluding People from Reminders (13.1)

Send Reminder	Action	Manuscript Number	Article Type	Date MS/Revision Submitted	Days Under Review	Reviewer Name & Status	# Additional Reviewers Needed	# Requires Reviews
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers	DEMOSGG-15-52	Demo	10/28/2015	N/A	No Reviewers Invited or Assigned	2	2
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers Submit Editor's Decision and Comments	DEMOSGG-15-49	Demo2	10/01/2015	N/A	No Reviewers Invited or Assigned	2	2
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers	DEMOSGG-15-50	Demo	10/01/2015	N/A	No Reviewers Invited or Assigned	2	2
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers View Reviews and Comments Submit Editor's Decision and Comments	DEMOSGG-15-48	Demo	09/17/2015	N/A	No Reviewers Invited or Assigned	0	0
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers Submit Editor's Decision and Comments	DEMOSGG-15-51	Demo	09/17/2015	N/A	No Reviewers Invited or Assigned	2	2
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers View Reviews and Comments	DEMOSGG-15-45	Demo	07/23/2015	N/A	No Reviewers Invited or Assigned	0	0
<input type="checkbox"/>	View Submission Details ▾ History Invite Reviewers	DEMOSGG-15-39	Special Issue Article	03/12/2015	128	Bryan Brown (Reviewer) Un-invited	0	0

**THANK YOU!**

Tony Alves, Director of Product Management

