Welcome to
EEMUG 2017

13th Annual European
em **Editorial Manager**®
User Group Meeting

Aries systems

Schedule Group Enhancements

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January 12, 2017

13th Annual
em European
Editorial Manager®
User Group Meeting

Aries systems

Schedule Group Enhancements Agenda

- Additional Schedule Group Detail Fields

- Schedule Group Flags

- Proposals and Pre-selected Submissions grid

Additional Schedule Group Detail Fields & Schedule Group Flags

Additional Schedule Group Detail Fields

What is an "Additional Schedule Group Detail Field"?

- Custom field, associated with Schedule Groups
- Can be configured as text, date, integer, decimal, notes, or list format
- Can have a Custom Metadata ID
- Can be associated with a Schedule Group Flag
- Displayed on the 'Edit Group Details' and 'Schedule Group Details' pages
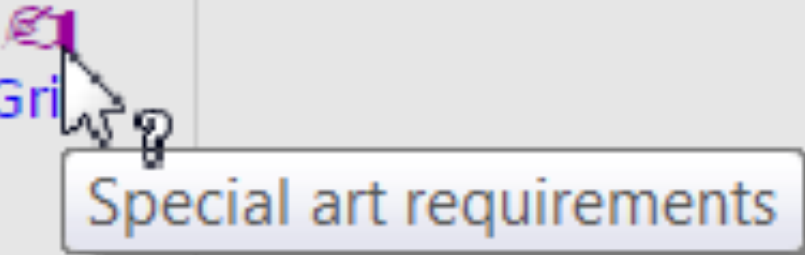- Multiple fields can be associated with a Schedule Group

- Example: "Special Art Requirements" (text or notes field)
- Configured in: PolicyManager, Add/Edit Additional Schedule Group Detail Fields page

Schedule Group Flags

- Master set of flag icons ("flag inventory") is hardcoded on each journal
- Pre-14.0: Flags can be designated as *Submission Flags* or *People Flags*
- 14.0+: Flags can now be designated as "*Schedule Group Flags*"
  - Custom name is associated with the flag icon
  - Flag must be associated with an Additional Schedule Group Detail Field
  - Flags are turned on from the 'Edit Group Details' page for a particular Schedule Group
  - Flag icons display next to 'Edit Group Details' link, when turned on
  - Hover-over text shows the flag name

Manage Schedule Groups

Edit Group Details
(with Additional Schedule Group Details)

Schedule Group Target Online Publication Date:		(mm/dd/yyyy)
Schedule Group Target Publication Date:		(mm/dd/yyyy)
Schedule Group Target Publication Volume:		
Year:		
Schedule Group Target Publication Issue:		
Target Number of Submissions:		
Page Budget:		
Black and White Image Budget:		
Color Image Budget:		

⊟ **Additional Schedule Group Details**

Special Art Requirements	These are some special art requirements.

Turn on Schedule Group Flag
Edit Group Details page

Schedule Group Target Online Publication Date:		(mm/dd/yyyy)
Schedule Group Target Publication Date:		(mm/dd/yyyy)
Schedule Group Target Publication Volume:		
Year:		
Schedule Group Target Publication Issue:		
Target Number of Submissions:		
Page Budget:		
Black and White Image Budget:		
Color Image Budget:		

⊟ **Additional Schedule Group Details**

Special Art Requirements	These are some special art requirements.	☑ Display 'Special art requirements' flag

Schedule Group Details (read-only page)

Schedule Group Details

Close

Schedule Group Description:	UNIQUE SCHEDULE GROUP
Schedule Group Notes:	
Schedule Group Target Online Publication Date:	
Schedule Group Target Publication Date:	
Schedule Group Target Publication Volume:	
Year:	
Schedule Group Target Publication Issue:	
Target Number of Submissions:	
Page Budget:	
Current Page Total:	0
Black and White Image Budget:	
Black and White Image Current Total:	0
Color Image Budget:	
Color Image Current Total:	0
Additional Schedule Group Details	
Special Art Requirements:	These are some special art requirements.

Configuration

Additional Schedule Group Detail Fields and Flags Configuration

- Configuration Rules:
  - Configure the Additional Schedule Group Detail *first* (in PolicyManager, Add/Edit Additional Schedule Group Detail fields)

PolicyManager Main Menu
Add/Edit Additional Schedule Group Detail Fields

Additional Data Policies

Add/Edit Additional People Detail Fields

Add/Edit Additional Manuscript Detail Fields

Add/Edit Additional Schedule Group Detail Fields

Edit Additional Invitation Details

Add/Edit Additional Schedule Group Detail Fields - PolicyManager

Add/Edit Additional Schedule Group Detail Fields

Listed below are the Additional Schedule Group Detail Fields added for your journal. The values for these fields are entered manually on the Edit Schedule Group Details page. If a Custom Flag has been configured to be associated with an Additional Schedule Group Detail field, an option to turn that Flag on or off will also appear next to the field.

Add

Order	Description	Associated with Flag	Actions
1	Special Art Requirements	✉ Special art requirements	Remove Edit

Update Item Order

Add

Define Custom Metadata IDs

Back to PolicyManager

Add Additional Schedule Group Detail Field

Add Additional Schedule Group Detail Field

Cancel   Submit

Open Special Character Palette

Field Description:

Special Art Requirements

Maximum 256 characters

Field Type: Notes ▼

Maximum Field Length: 500

                                 (A value from 1 to 20000)

Default Value for Field: ⦿ None
If 'None' is selected, an empty text box
will appear if the checkbox 'Editable' is   ◯ Single Value (enter value below)
checked in the grid below.

Add Additional Schedule Group Detail Field

Options

Select the 'Hide' checkbox to suppress the field on a particular screen. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Hidden' box is checked for BITS Transmittals, the data in this field will be excluded in BITS transmittals when applicable. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

The 'Issue Schedule Group Family' and 'Book Schedule Group Family' options control whether or not the custom field is available for a Schedule Group. Enable the 'Hide' option to prevent a custom field from being associated with a Schedule Group Family.

Page	Hide	Editable	Help Text
Edit Schedule Group Details	☐	☑	
BITS Transmittals	☐	N/A	
		Custom Metadata ID: ⓘ Select Custom Metadata ID	
Issue Schedule Group Family	☐	N/A	
Book Schedule Group Family	☐	N/A	

Cancel   Submit

Additional Schedule Group Detail Fields and Flags Configuration

- Configuration Rules:
  - Configure the Additional Schedule Group Detail *first* (in PolicyManager, Add/Edit Additional Schedule Group Detail fields)
  - Then, associate a flag icon with an Additional Schedule Group Detail, and give the flag a name (like "Special art requirements" (PolicyManager, Create Customized Schedule Group Flags)
  - Note: Each flag icon can be used for only <u>one</u> purpose (Submission, People or Schedule Group)
  - Flags are turned on/off via the 'Edit Group Details' page
  - Relevant RoleManager permissions:
    - View Schedule Group Flags
    - Turn on Schedule Group Flags
    - Turn off Schedule Group Flags

PolicyManager Main Menu
Create Customized Schedule Group Flags

General Policies

Set Manuscript Number Type

Set Manuscript Number Revision Suffix

Set Date Format

Set Time Zone Display Policy

Configure Unavailability Check and Instructions

Set ISO Country Standard

Configure General Due Date Preferences

Set Reviewer Preferences

Configure Electronic Calendar Due Date Preferences

Set Editor Deep Link Expiration

Set Enterprise Analytics Reporting Deep Link

Define Details Page Layouts

Set Update Information Deep Link Expiration

Create Customized Submission Flags

Create Customized People Flags

Create Customized Schedule Group Flags

Create Customized Schedule Group Flags

Create Customized Schedule Group Flags

Schedule Group Flags can be selected to display for a Schedule Group on the Edit Group Details page if a Schedule Group Flag has been associated with an 'Additional Schedule Group Detail' (ASGD) field. If a flag is associated with a specific ASGD field, the option to display or remove the flag displays next to the associated ASGD field. When a flag is displayed for a Schedule Group, it is visible within the Manage Schedule Groups folder where the 'Edit Group Details' action link is displayed. Only Editors and Publishers with appropriate RoleManager permissions will be able to view, turn on, or turn off Schedule Group Flags.

Add

Order		Flag	Flag Name	Associated With ASGD		
1			Special art requirements	Special Art Requirements	Remove	Edit

Update Item Order

Add

Back to PolicyManager

Create Customized Schedule Group Flags

Edit Customized Schedule Group Flag

Cancel   Submit

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On Schedule Group Flags' and 'Turn Off Schedule Group Flags' can display/turn off Submission Flags for any Schedule Group on the Edit Group Details page (accessible from the Manage Schedule Group folder) when a flag is associated with an Additional Schedule Group Detail field. When a flag is attached to a Schedule Group, it will be displayed next to the 'Edit Group Details' action link displayed in the Manage Schedule Groups folder (Editor and Publisher Roles must have permission to 'View Schedule Group Flags').

Flag Icon:

Original Flag Icon:

Open Special Character Palette

Flag Name: Special art requirements

Maximum 256 characters
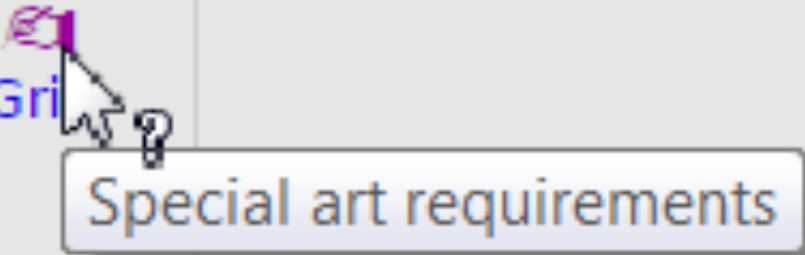
Associate with ASGD Field: Special Art Requirements ▼

☐ **Hide** When you hide a flag, the flag cannot be turned on for additional Schedule Groups, but will continue to display where previously selected (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 Schedule Group to which it was attached.

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Manage Schedule Groups

Assign Production Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group	13.0-32 Proposal Schedule Group (Copy)	0
Assign Production Task Edit Group Details Production Status Gri History File Inventory Copy Group Close Group	UNIQUE SCHEDULE GROUP Special art requirements	0

Proposals and Pre-selected Submissions Grid

Proposals and Schedule Group Pre-selected Submissions Grid

- For customers using both EM and PM
- For customers using Proposals to invite submissions, e.g. for a special issue
- Proposals can now appear on Schedule Group TOC as Schedule Group Headers
- Invited Submissions from a Proposal can now be automatically associated with a Schedule Group/Issue
- Invited Submission manuscript numbers can be customized when a Proposal is initiated

Pre-assign Proposal and invited submissions to Schedule Group

- Proposals (and their children) can be automatically assigned to a Schedule Group
- New "Assign to Schedule Group" configuration option on 'Edit Article Type' page, for Article Types in the 'Proposal' family.
  - Can configure as "Hidden", "Optional", or "Required"
- For EM/PM sites

Pre-assign Proposal and invited submissions to Schedule Group

- When Proposal Initiated, drop-down of Schedule Groups available
  - Selection of Schedule Group can be Optional or Required
  - Editors with "Manage Schedule Groups" permission can also 'Add Schedule Group' directly from the Initiate Proposal workflow
- Proposal automatically listed as a 'header' in Schedule Group Table of Contents grid

Predefine Invited Submission Manuscript Numbers (version 13.1)

- Each Proposal can have its own set of predefined Invited Manuscript Numbers for its child submissions
  - Example:
    - SPECIALISSUE1-D-00001
    - SPECIALISSUE1-D-00002
  - Consists of "Prefix", "Starting Number", and "Minimum Number of Digits in Starting Number"
    - Prefix= SPECIALISSUE1-D-
    - Starting Number = 1
    - Minimum Number of Digits in Starting Number = 5

Pre-assign Proposal and invited submissions to Schedule Group

- When invited submissions received, automatically listed in new "Pre-selected Submissions Grid" on the Edit Schedule Group Details/Schedule Group Details pages
- When production initiated on each invited submission, it automatically "jumps up" into the Schedule Group TOC under its associated Proposal header

Pre-assign Proposal and invited submissions to Schedule Group

Table of Contents

Actions		Target TOC Position	Manuscript Number	Article Type	Editor Originating Proposal	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Black and White Image Count	Color Image Count
Details ⚑ Remove Header	Proposal Header	1	CAROLINEDEV130-D-16-00019	Issue Proposal - EMUG 2016	Ed J Editor	0					This is my Issue Proposal for EMUG 2016		0
Production Details ⚑ Transmittal Form Remove from Group Linked Submissions		2	CAROLINEDEV130-D-16-00020	Perspective		Sharon Webster, MD	0	0	0	Custom Status -copy edit started	10.11260150031	This is my invited submission for a proposal	0	0
⊞ Additional Manuscript Details														

[Update TOC] [Insert Header]

Pre-selected Submissions

Actions		Target TOC Position	Manuscript Number ▲▼	Article Type ▲▼	Article Title ▲▼	Editor Originating Proposal	Author Name	Target Number of Pages	Editorial Status	DOI	Black and White Image Count	Color Image Count	Submission Target Online Date	Submission Actual Online Date
		1	CAROLINEDEV130-D-16-00019	Issue Proposal - EMUG 2016	This is my Issue Proposal for EMUG 2016	Ed J Editor		0	Authors Invited for Proposal			0		
Details ⚑ Transmittal Form View Reviews and Comments			CAROLINEDEV130-D-16-00021	Perspective	Caroline's invited submission		Caroline Webber	0	Submitted to Journal		0	0		

[Submit] [Cancel] [Add Submissions]

Pre-assign Proposal and invited submissions to Schedule Group

Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Editor Originating Proposal	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Black and White Image Count	Color Image Count
Details 🏳 Remove Header	1	CAROLINEDEV130-D-16-00019	Issue Proposal - EMUG 2016	Ed J Editor		0					This is my Issue Proposal for EMUG 2016		0
Production Details 🏳 Transmittal Form Remove from Group Linked Submissions	2	CAROLINEDEV130-D-16-00020	Perspective		Sharon Webster, MD	0	0	0	Custom Status -copy edit started	10.11260150031	This is my invited submission for a proposal	0	0

➕ Additional Manuscript Details

[Update TOC] [Insert Header]

Pre-selected Submissions Grid

Pre-selected Submissions

Actions	Target TOC Position	Manuscript Number ▲▼	Article Type ▲▼	Article Title ▲▼	Editor Originating Proposal	Author Name	Target Number of Pages	Editorial Status	DOI	Black and White Image Count	Color Image Count	Submission Target Online Date	Submission Actual Online Date
	1	CAROLINEDEV130-D-16-00019	Issue Proposal - EMUG 2016	This is my Issue Proposal for EMUG 2016	Ed J Editor		0	Authors Invited for Proposal			0		
Details 🏳 Transmittal Form View Reviews and Comments		CAROLINEDEV130-D-16-00021	Perspective	Caroline's invited submission		Caroline Webber	0	Submitted to Journal		0	0		

[Submit] [Cancel] [Add Submissions]

Questions ?

Thank You!