

# Welcome to EEMUG 2016



**em** Editorial Manager®  
[www.ariessys.com](http://www.ariessys.com)

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

# Version 12.2 & 13.0

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# Version 12.2

**General Release Begins February 2016**

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# Flag History

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

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'.
- 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

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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# Automated Submission Withdrawal

Setting Final Disposition to “Withdrawn” is a manual process often forgotten. Submissions then build up in the Editor’s *Submissions Out for Revision* folder.

**SOLUTION:** When an Author declines to revise a submission, the system will automatically set the Final Disposition to “Withdrawn”.

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# Automated Submission Withdrawal

PolicyManager setting to configure number of days after which a submission is automatically “Withdrawn”.

## Configure Automatic Withdrawal of Declined Revisions

Use the option below to automatically set the Final Disposition to 'Withdrawn' one or more days after the Author declines to revise the submission. When this feature is enabled, the Final Disposition is automatically set to 'Withdrawn' during the nightly batch process the specified number of days after the Author declines to revise. If there is a very large number of submissions to be withdrawn in a single batch cycle, the process may be spread over two or more batch cycles to ensure optimal performance. If this option is not enabled, submissions remain in the Editor's 'Submissions Out for Revision' folder until the final disposition is manually set to Withdrawn.

Note: If the Editor rescinds the decision or the Author reinstates the submission (after declining to revise), the Final Disposition will not automatically be set to Withdrawn.

Automatically set the Final Disposition to Withdrawn  days after the Author declines to revise



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# Letter Improvements

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

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



**Editor**

**Name:**  Edward Editor, MD  [Proxy]

**Role:** Editor-in-Chief

**Date Assigned:** Nov 4 2015 10:53AM


**Date Completed:**

**Elapsed Days:** 37

**Recommendation:**


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**Reviewers**

**Name:**  Barry Author (Reviewer)  [Proxy]



**Review Status:** Reviewer Invited

**Date Reviewer Invited:** Dec 01 2015 01:13PM

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

**Elapsed Days:** 17

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**Name:**  Dianne Author (Reviewer)  [Proxy]

**Review Status:** Reviewer Invited

**Date Reviewer Invited:** Dec 01 2015 01:13PM

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# Letter Improvements

Managing Letters can be a hassle. Recent updates have included “Letter Hiding” and “Letter Sorting”.

Understanding how and where letters are being used would also be helpful!

**SOLUTION:** New ActionManager Roles and Events column is added to the *Edit Letters* page. This lists all combinations of Role and ActionManager Events for which the associated Letter Template has been selected.

# Letter Improvements

Add New Letter

Save Changes

Edit Image Files for Letters

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		
			Text	Rich Text (HTML)	All Formats
Publisher Notification of Accepted Manuscript	General	<a href="#">Production Manager - Final Disposition - Accept</a> <a href="#">Production Team - Final Disposition - Accept</a> <a href="#">Production Team - Final Disposition - Accept and Transmit Conference Submission</a>	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
Removed Submission	General	<a href="#">Editor-in-Chief - Editor - Remove Submission</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
Rescind Decision	General	<a href="#">Ann - Editor - Rescind Decision</a> <a href="#">Editor-in-Chief - Rescind Decision</a> <a href="#">Managing Editor - Rescind Decision</a> <a href="#">Associate Editor - Rescind Decision</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
Reviewer - Decline Thank you Letter	General	<a href="#">Reviewer - Reviewer Decline</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
Reviewer Instructions and Due Date	General	<a href="#">Reviewer - Reviewer Agree</a> <a href="#">Statistical Reviewer - Reviewer Agree</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
Reviewer Thank You	General	<a href="#">Reviewer - Review Assignment Completed</a> <a href="#">Statistical Reviewer - Review Assignment Completed</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
Reviewer Thank You					

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# Letter Improvements

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

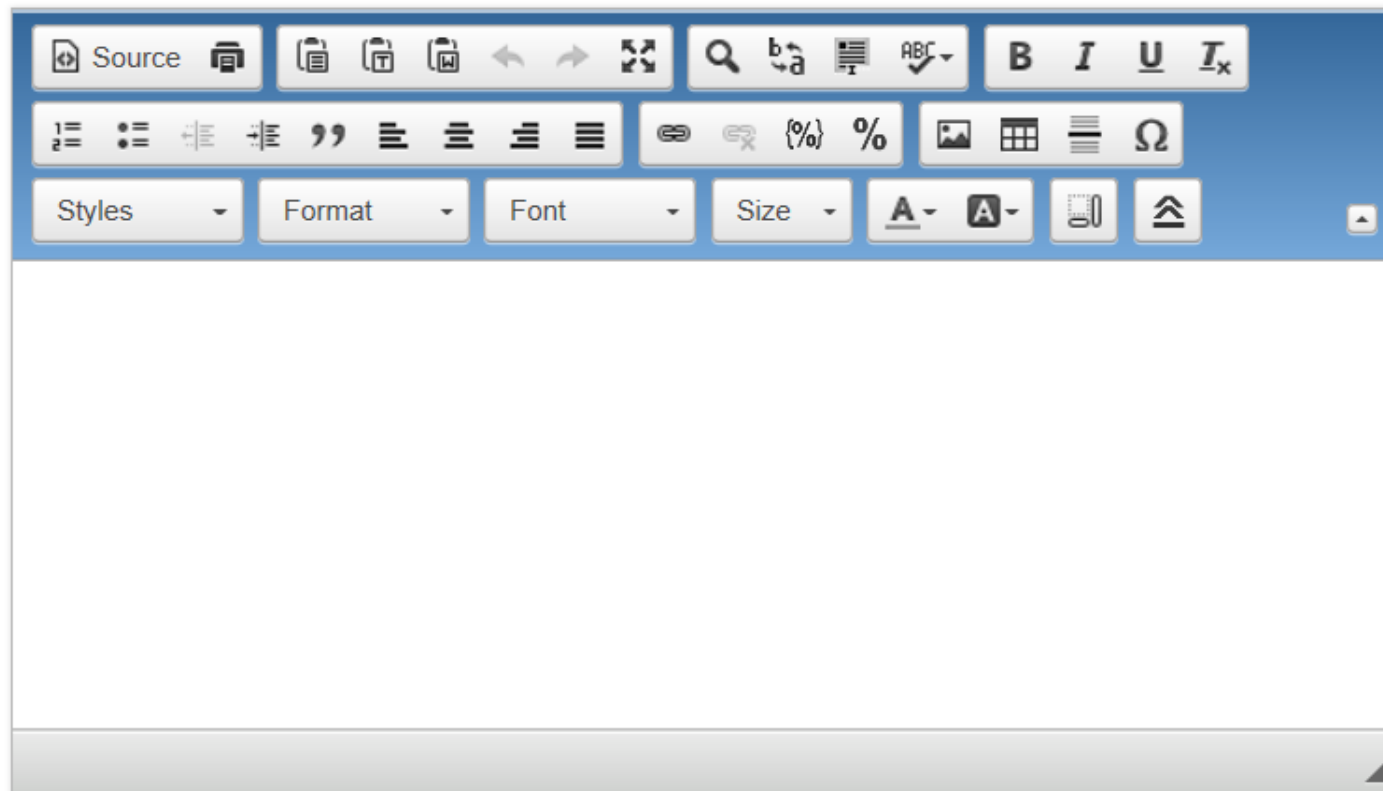
Current HTML letter configuration required knowledge of HTML mark up.

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

# Letter Improvements

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

Letter Body:



Cancel

Preview Letter

Save

# Letter Improvements

Letter Purpose:

Subject:

Letter Family:

Sender's E-mail Address:  "DEMO 11.0 Editorial" <trash1@ariescc.com>  
 Use Corresponding Editor's E-mail address  
 Use Corresponding Production Editor's E-mail address

### Additional Recipients

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

### Automatically cc: bcc:

- Corresponding Editor  
  Corresponding Production Editor

Send copies to the following addresses:  
(Multiple addresses may be entered, separated by a semicolon)

cc:

bcc:

Allow attachments

Letter Body:

Source

Rich Text Editor

Styles - Format - Font - Size - A - A - [Icons]

Ref.: Ms. No. %MS\_NUMBER%  
%ARTICLE\_TITLE%  
%CORRAUTHOR%  
%JOURNALFULLTITLE%

Dear %TITLE% %LAST\_NAME%,

I am passing the above article to you for handling. Please log onto Editorial Manager as an editor to view the details and PDF. <http://demo.edmgr.com> username: %USERNAME% password: %PASSWORD%

Regards

%EDITOR\_NAME%  
%EDITOR\_ROLE%

# Letter Improvements


From:	"DEMO 11.0 Production" <trash2@ariessc.com>
To:	Edward Editor, MD
Letter Purpose:	Editor Assignment
Letter Subject:	<input type="text" value="You have a new Editor Assignment"/>





The Editors assigned to the current version of the submission are shown below. 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: [Open in New Window](#)



Styles   Format   Font   Size      

Ref.: Ms. No. %MS\_NUMBER%  
%ARTICLE\_TITLE%  
%CORRAUTHOR%  
%JOURNALFULLTITLE%

Dear %TITLE% %LAST\_NAME%,

I am passing the above article to you for handling. Please log onto Editorial Manager as an editor to view the details and PDF. <http://demo.edmgr.com> username: %USERNAME% password: %PASSWORD%



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# Customizable Grids

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.

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# Power Grid Expansion

The new customizable grid will be expanded to additional pages

- *New Submissions*
- *Revised Submissions*
- *New Submissions Requiring Assignment*
- *View All Assigned Submissions*
- *View All Submissions with Editors Invited-None Yet Assigned*

# Power Grid Expansion

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

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

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 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

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## Editor Substitution

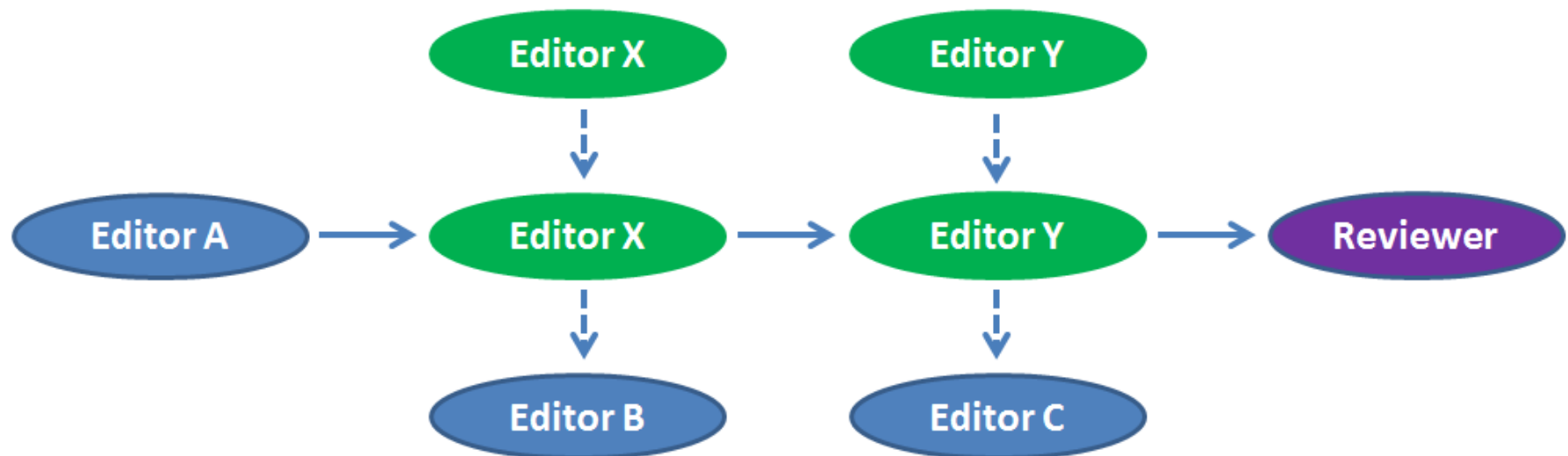
Currently – only the lowest level Editor can be unassigned or switched. Sometimes it is necessary to change an Editor who appears earlier in the editor chain because of retirement or...

**SOLUTION: Switch an Editor anywhere in the chain at anytime.**

- New – any Editor in the chain can be swapped with another Editor with the same permissions and configurations
- New Editor will inherit the status and performance of the old Editor

# Editor Substitution

Switch an Editor anywhere in the chain at anytime



# Editor Substitution

Switch an Editor anywhere in the chain at anytime.

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor <input type="text"/>	None Selected <input type="text"/>
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor <input type="text"/>	None Selected <input type="text"/>
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor <input type="text"/>	<a href="#">Editor Search</a>



# Editor Substitution

Letters can be sent to the affected Editors and admin.

**Editor Being Unassigned**

Name	Letter		Do Not Send Letter
<a href="#">John Editor (Section Editor)</a>	Editor Assignment Undone ▼	<a href="#">Customize</a>	<input type="checkbox"/>

**Others Notified of Editor Unassignment**

Name	Letter		Do Not Send Letter
<a href="#">Sally Editor, PhD (Managing Editor)</a>	Editor Notice an Assignment was Undone ▼	<a href="#">Customize</a>	<input type="checkbox"/>

**Editor Being Assigned (Switched To)**

Name	Letter		Do Not Send Letter
<a href="#">David Editor (Section Editor)</a>	Editor Assignment ▼	<a href="#">Customize</a>	<input type="checkbox"/>

# Editor Substitution

Lots of warnings prevent bad chains!

## Modify Editor Chain

[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor  
Assignment Chain

The current Editor Assignment Chain is displayed. You may

### Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Managing Editor	None Selected
	Editor 2	<a href="#">David Editor</a> Section Editor	Section Editor	None Selected
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	<a href="#">Editor Search</a>
	Cannot Assign a person twice		<a href="#">enley</a> Associate Editor	Associate Editor

### Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Guest Editor	John Lennon
	Cannot Assign On		<a href="#">David Editor</a> Section Editor	Section Editor
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	<a href="#">Editor Search</a>

## Modify Editor Chain

[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor

### Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	<a href="#">Sally Editor</a> Managing Editor	Guest Editor	John Lennon
		Cannot Submit a Decision		<a href="#">David Editor</a> Section Editor
		<i>(Major Revision)</i>		Section Editor
	Editor 3	<a href="#">Michael Editor</a> Associate Editor	Associate Editor	<a href="#">Editor Search</a>
		<i>(Minor Revision)</i>		

## Modify Editor Chain

[View Reviews and Comments](#)

**Manuscript Number:**  
SALLYDEV120-D-15-00015

**Title:** Testing Editor  
Assignment Chain

The current Editor Assignment

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# Proxy Register Changes

Currently in EM/PM Editors are only forced to enter minimal data. This is because Editors need a hassle-free way to Proxy Register other users, especially Reviewers. However, there is often a need to force Editors to enter specific data, like an email or an institution.

**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

## Tightened controls and unique requirements for Proxy Registration of users by Editors

### 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

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. [Read More.](#)

**Required Information**

**Personal Information**

Given/First Name \*

Family/Last Name \*

Preferred Method of Contact \*  E-mail  Fax  Postal Mail  Telephone

Telephone Number \*  (including country code)

**Institution Related Information**

Institution \*  max 450 characters

Department \*  max 450 characters

Country \*  Please choose a country

Address is for (Work, Home, Other) \*  Work  Home  Other

**+ User Information**

**+ Enter More Contact Information**

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# Reviewer Discussion Forum

The popularity of Open Peer Review is growing, publications are experimenting with review models, including openness during actual review.

## **SOLUTION: Reviewer participation in Discussion Forums.**

- Reviewer must be assigned to the submission
- Reviewers and Editors can discuss a manuscript
- Reviewers do not gain access to information they would not normally have access to

# Reviewer Discussion Forum

Discussion Trigger	Editor Agrees to Assignment	First Editor Confirmed
<p><b>Article Type</b></p> <p><b>Original Research</b></p>	<p><input type="checkbox"/> Initiate Editor Consultation Discussion Automatically</p> <p>Editor Roles: <a href="#">Select All</a> <a href="#">Clear All</a></p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Ann - Editor</p> <p>Associate Editor</p> <p>Deputy Editor</p> <p>Editor-in-Chief</p> </div> <p>Editor Consultation Topic Templates:</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Please Choose a Topic Template</p> </div>	<p><input type="checkbox"/> <i>Initiate Reviewer Consultation Discussion Automatically</i></p> <p><i>Reviewer Consultation Topic Templates:</i></p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Please Choose a Topic Template</p> </div>
<p><b>Commentary</b></p>	<p><input type="checkbox"/> Initiate Editor Consultation Discussion Automatically</p> <p>Editor Roles: <a href="#">Select All</a> <a href="#">Clear All</a></p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Ann - Editor</p> <p>Associate Editor</p> <p>Deputy Editor</p> <p>Editor-in-Chief</p> </div> <p>Editor Consultation Topic Templates:</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Please Choose a Topic Template</p> </div>	<p><input type="checkbox"/> <i>Initiate Reviewer Consultation Discussion Automatically</i></p> <p><i>Reviewer Consultation Topic Templates:</i></p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Please Choose a Topic Template</p> </div>
<p><b>Letter to the Editor</b></p>	<p><input type="checkbox"/> Initiate Editor Consultation Discussion Automatically</p> <p>Editor Roles: <a href="#">Select All</a> <a href="#">Clear All</a></p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Ann - Editor</p> <p>Associate Editor</p> <p>Deputy Editor</p> <p>Editor-in-Chief</p> </div>	<p><input type="checkbox"/> <i>Initiate Reviewer Consultation Discussion Automatically</i></p> <p><i>Reviewer Consultation Topic Templates:</i></p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Please Choose a Topic Template</p> </div>

# Reviewer Discussion Forum

## Add Discussion Topic Template

There are two types of discussions: Editor Consultation and Reviewer Consultation. The set of configuration options differs slightly for the two types. (more...)

Discussion Topic Template Type

Discussion Topic Template Name	Find Qualified Reviewers
'Initiate Discussion' Page Custom Instructions	
Topic	Suggestions for Good Reviewers <input checked="" type="checkbox"/> Allow user to modify Topic name when initiated
Initial Comments	This discussion allows all Editors to discuss a submission to a submission to discuss it over a submission. <input type="checkbox"/> Allow user to modify Initial Comments when initiated
Default Editor Participant Permissions	<input checked="" type="checkbox"/> View Reviews and Comments <input type="checkbox"/> Download Files (source and companion) <input type="checkbox"/> View Draft Decision Letter
Editor Access to 'Details' Link	<input checked="" type="checkbox"/> Display 'Details' link in Submissions with Approval page. Select the Details Page Layout that participants in the chain and do not have RoleManager permission to view Manuscripts. <input type="text" value="Editorial Kitchen Sink"/>
Editor Discussion Letters	Select the Letter to send asking Editors to participate: <input type="text" value="Editor - You have been added to a discussion"/> Select the notification letter to send to Editors: <input type="text" value="Editor - New Comment Posted to Discussion"/> <input type="radio"/> Notify discussion initiator only <input checked="" type="radio"/> Notify all active Editor participants
Reviewer Discussion Letters	Select the Letter to send asking Reviewers to participate: <input type="text" value="Reviewer - You have been added to a discussion"/> Select the notification letter to send to Reviewers when comments are posted: <input type="text" value="Reviewer - New Comment Posted to Discussion"/>

Hide When you Hide a Discussion Topic Template, it will no longer be available for selection on the Initiate Discussion page.

## Configure Discussion Topic Templates

Listed below are the Discussion Topic Templates configured for your publication. To create a new topic template, click the 'Add' button.

There are two types of topic templates: 'Editor Consultation' and 'Reviewer Consultation'. You may define any number of topic templates for each type. Any number of Editor Consultation discussions may be open at the same time for a submission, but only one Reviewer Consultation discussion may be opened for a submission.

Add

Order	Type	Description	Actions
<input type="text" value="1"/>	Editor Consultation	Default Topic Template	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="2"/>	Editor Consultation	Decision Letter Review	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="3"/>	Editor Consultation	Master Topic Template	<a href="#">Edit</a> (Master)
<input type="text" value="4"/>	Reviewer Consultation	Editors and Reviewers - Auto Initiate	<a href="#">Remove</a> <a href="#">Edit</a>

Update Order

Editor Consultation

Reviewer Criteria (Hidden)

[Remove](#) [Edit](#)

# Reviewer Discussion Forum

Topic: Reviewers du Jour

Comments:

Post

View/Print All

Participant ▲▼	Comments	Date ▲▼
Mary Jones, PhD	Hey, I am Mary Jones and I'm testing what happens when a discussion is <a href="#">(more...)</a>	Jan 13 2015 12:54PM
Ginger Rabelais (Reviewer 1)	Take it to the mountain.	Jan 12 2015 03:39PM
Twink E. Jonesey, PhD	Hey, I'm an EIC.	Jan 06 2015 03:37PM
Edward M. Browdy	Take the A-Train	Jan 05 2015 02:36PM
Mary Jones, PhD	Let's roll!	Jan 04 2015 01:35PM

View/Print All

Date ▲▼
Dec 12 2014 04:45PM
Dec 04 2014 12:55PM
Dec 03 2014 11:05AM
Dec 03 2014 11:04AM
Dec 01 2014 03:03PM

## Editor Participants

Editor Participant ▲▼	Role ▲▼	# Posts	Latest Post	Participant Status ▲▼	View Reviews and Comments	Download Files	View Draft Decision Letter
Mary Jones, PhD 🏆	Managing Editor	1	Jan 13 2015 12:54PM	Active	✓	✓	✓
Twink E. Jonesey, PhD 📊♣	Editor-in-Chief	1	Jan 06 2015 03:37PM	Active	✓	✓	✓
Edward M. Browdy 📊♣	Associate Editor	2	Jan 05 2015 02:36PM	Inactive	✓		

## Reviewer Participants

Reviewer Participant ▲▼	Role ▲▼	# Posts	Latest Post	Participant Status ▲▼	Reviewer Number ▲▼	Complete Review Submitted for Versions ▲▼	Status of Most Recent Review Assignment ▲▼
Ginger Rabelais ❤️	Reviewer	1	Jan 12 2015 03:39PM	Active	Reviewer 1	R0, R1, R2	R2: Review Complete
Ron Raptor 🏆	Reviewer	0		Active	Reviewer 2	R0	R1: Declined
Vanessa Wright 📊	Reviewer	0		Active	Reviewer 4	R1	R2: Partial Review Saved
George Bortnichak 📊	Statistical Reviewer	0		Inactive	Reviewer 5		R2: Reviewer Invited
Melissa Humphrey 📊	Analytical Reviewer	0		Inactive	Reviewer 3		R0: Terminated After Agreeing to Review



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# Version 13.0

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

**Upgrades July/August 2016**

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# Authorship and Attribution

The order of authorship in the case of multi-authored works has no generally agreed upon truth or meaning, and typically does not clarify the contribution to the research in question.

Multi-authorship, especially in the sciences, is increasingly the norm, and the number of authors per paper is growing.

**SOLUTION:**



# Authorship and Attribution

**Enter Author Details** Open Special Character Palette

Given/First Name\* June  
Middle Name  
Family/Last Name\* Austen  
Academic Degree(s)  
Affiliation  
E-mail Address\* jausten@jausten.com  
ORCID  [Fetch](#)  
[What is ORCID?](#)  
Institution   
Department   
City   
State   
Zip or Postal Code   
Country\* UNITED STATES

**Contributor Roles\*** Instructions

- Conceptualization
- Data curation
- Formal analysis
- Funding acquisition
- Investigation
- Methodology
- Project administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing - original draft
- Writing - review & editing

**Contributor Roles\*** Instructions

- Conceptualization
- Data curation
- Formal analysis
- Funding acquisition
- Investigation
- Methodology
- Project administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing - original draft
- Writing - review & editing

Select degree   
Select degree  
Lead  
Supporting  
Equal

# Authorship and Attribution

## Configure Contributor Roles

Contributor Roles can be attributed to each Author of a submission. On this page, you select the taxonomy, specify the metadata to be collected, and define the custom instruction when attributing roles. Then on the *Set Other Author Parameters* page, you can specify Contributor Roles for your publication (along with the other parameters for Authors). On this page, you can specify whether Contributor Roles are Required or Optional for an Article Type.

For more information on Contributor Roles and Project CRediT, click here: <http://cred>

### Set Taxonomy Version

Select a version of the CRediT Taxonomy's Contributor Roles from the dropdown menu.

Choose Taxonomy:   [View Taxonomy](#)

### Select Additional Metadata to be Collected

The following options allow you to specify whether to collect a Degree of Contribution assigned to an Author, and whether to display a text box to allow the Corresponding Author to provide a description of a role that is not in the taxonomy.

- Collect 'Degrees of Contribution'
- Display 'Other' field for free-text entry of a role name

### Edit Instructions

Enter any instructions that you would like to appear when a user clicks the 'Instructions' link for Contributor Roles for an Author.

Area	Instructions
Contributor Roles Instructions	<p><a href="#">Insert Special Character</a></p> <p>The roles listed are from the CRediT Taxonomy, a classification standard used to ensure that Authors are credited for their contributions toward published scholarly works. Please visit <a href="#">CRediT</a> for more information.</p>

### Set Other Author Parameters

You may request additional information about Other Authors entered on the **Add/Edit/Remove Authors** manuscript submission step. Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'. If your Publication chooses to require Other Author verification or registration for any Article Type, you may want to select E-mail or other address fields as required for all Other Authors so that you will have a means of contacting Other Authors. ([more...](#))

#### Other Author Parameters

#### Include in Merge Field?

- Set "Title" Text Entry Box Preference:
- Given/First Name:
- Part of page omitted*
- Set "Country" Text Entry Box Preference:
- Set "Contributor Roles" Preference:
- Set "Deceased Status" Text Entry Box Preference:
- Set "Post-Publication Corresponding Author" Text Entry Box Preference:

- Concise
- Data
- Form
- Fund
- Invest
- Meth
- Proj
- Reso
- Software
- Supervision
- Validation
- Visualization
- Writing – original draft
- Writing – review & editing

---

## Warning – Author List Has Been Changed!

Authors sometime add or remove contributors when submitting revisions. It is important for the publication to know about this, as it is sometimes a red flag for fraud, or there may be a need to collect information or agreements from the added authors.

**SOLUTION: Warn Editors and provide access to the author list for comparison.**

---

# Warning – Author List Has Been Changed!

Hover over  shows: “Author list has been modified”

Warning appears:

- in Revised Submissions
- in Revised Submissions Requiring Assignment
- in Search Submission Results
- on Technical Check page
- on Details
  - Under “Other Authors”

# Warning – Author List Has Been Changed!

Revised Submissions Requiring Assignment – Ed J Editor, MD

Contents: These are the revised submissions that require an Editor Assignment/Reassignment. Use the up/down arrows to change the sort order.

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

Action	Manuscript Number	Article Type	Section/Article	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Decision
<a href="#">View Submission</a> <a href="#">Details</a> ⚠ <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">Technical Information</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Send Back to Author</a> <a href="#">Classifications</a> <a href="#">Assign Editor</a> <a href="#">Set Final Disposition</a> <a href="#">View Reviews and Similar Articles</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	CAROLINEDEV92-D-12-00016R1	Original Study	Submission where list item is hidden before rev 0 and restored before rev 1	Duncan James Webber, MD	May 21 2012 2:51PM	Jul 12 2015 7:13PM	Revision Submitted	Minor Revision

**Details for Manuscript Number: CAROLINEDEV107-D-12-00016R1**  
title"

Cancel Save Save and Close Display 10 results per page.

Days to Revise/Date Revision Due Abstract Manuscript Notes Production Notes  
Reviewers Reviewers Proposed by Editors Additional Information

<b>Additional Manuscript Details:</b>	Add/Edit Additional Manuscript Detail
<b>Corresponding Author:</b>	Duncan James Webber, Aries Systems North Andover, MA UNITED STATES [Proxy]
<b>Corresponding Author E-Mail:</b>	cwebber@ariessc.com
<b>Author Comments:</b>	
<b>Other Authors:</b>	Jane Author
	Author Status ⚠
<b>Short Title:</b>	
<b>Article Type:</b>	Original Study

---

# Warning – Author List Has Been Changed!

Editors have visibility to changes made to the Author List between current revision and immediate prior revision.

*Author Details* page shows:

- Changes to Author order
- Changes to Corresponding Author
- Changes to Contributing Authors (added and removed)
- Which Revision changes took place
- Changes to CRediT
- If change was made during a proxy session



# Warning – Author List Has Been Changed!

**Author Detail**

**Corresponding Author Status**

Order	Author Name	E-mail Address
1	Maney M. Alexander <i>(New Corresponding Author)</i> <i>(Former Order: 2)</i>	trash3969@ariessc.com

**Other Author Status**

Order	Author Name	Added in Revision
2	Jason Author <i>(Former Corresponding Author)</i> <i>(Former Order: 1)</i>	R0 - Jason Author
3	June Bug <i>New</i>	R1 - Jason Author

To update the Co-Author's e-mail address that is associated with the submission, click on the e-mail address in the table above.  
To resend letters to all Other Authors with a status of 'No Response' and use the link next to that Author's name.

**Removed Authors**

Author Name	Removed in Revision
Samuel Becket	R1 - Jason Author
Annie L. Emnop	R1 - Duncan Webber, MD <i>[proxied by Editor, MD]</i>

**Corresponding Author Status**

Order	Author Name	E-mail Address
1	Maney M. Alexander <i>(New Corresponding Author)</i> <i>(Former Order: 2)</i>	trash3969@ariessc.com

**Other Author Status**

Order	Author Name	Added in Revision	E-mail Address
2	Jason Author <i>(Former Corresponding Author)</i> <i>(Former Order: 1)</i>	R0 - Jason Author	trash0@ariessc.com <a href="#">Edit</a>
3	June Bug <i>New</i>	R1 - Jason Author	trash0@ariessc.com <a href="#">Edit</a>

trash1@ariessc.com	0000-0001-9524-1592	M.D., Ph.D
trash2@ariessc.com	0000-0001-9524-1592	

# Warning – Author List Has Been Changed!

### Corresponding Author Status

Order	Author Name	Contributor Roles
1	Maney M. Alexander	Conceptualization Funding acquisition Methodology Project administration Supervision

### Other Author Status

Order	Author Name	Added in Revision
2	Jason Author	R0 - Jason Author
3	June Bug <sup>New</sup>	R1 - Jason Author

To update the Co-Author's e-mail address that is associated with t  
To resend letters to all Other Authors with a status of 'No Respon  
use the link next to that Author's name.

[Send Letters](#)

### Removed Authors

Author Name	Removed in Revision
Samuel Becket	R1 - Jason Author
Annie L. Emnop	R1 - Duncan Webber, MD [proxied by Ed. Editor, MD]

### Corresponding Author Status

Order	Author Name	Contributor Roles	E-mail Address
1	Maney M. Alexander	Conceptualization Funding acquisition <sup>New</sup> Methodology Project administration Supervision	trash3969@ariessc.com

### Other Author Status

Order	Author Name	Added in Revision	Contributor Roles	E-mail Address
2	Jason Author	R0 - Jason Author	Formal analysis Software Writing - original draft <i>Conceptualization</i>	trash1@ariessc.com <a href="#">Edit</a>
3	June Bug <sup>New</sup>	R1 - Jason Author	Data curation Writing - revise & editing	trash2@ariessc.com <a href="#">Edit</a>

			trash1@ariessc.com	0000-0001-9524-1592	M.D., Ph.D	
			trash2@ariessc.com	0000-0001-9524-1592		

[Close](#)

---

## File Type Limits on Submission

Publications want to restrict what types of files are uploaded, usually because the production process can only utilize certain file types.

**SOLUTION: Restrict file types for Authors adding/editing new or revised submissions on the *Attach Files* page. It will not apply to Editors.**

“Allow all file types except (exclusive list)” - the file type can be any type *except* one of the file types listed for this option.

“Allow only these files types (inclusive list)” - the file type must be one of the file types listed for this option.

# File Type Limits on Submission

## Edit Submission Item Type

### Restricted File Types

You can restrict the types of files that can be uploaded for a Submission Item on the Attach Files page for both New and Revised submissions, with one exception: compressed files (zip, gz, tgz, and tar) cannot be restricted.

For a file that will be built into a Reviewer PDF or Author/Editor PDF, you can allow all file types supported by the system for PDFs, or define either an exclusive list or an inclusive list which is based on the file types supported by the system for PDF handling:

- Allow all file types supported for PDFs (no publication file restrictions)
- Exclusive: Allow all file types on the list except the ones selected.
- Inclusive: Allow only the file types selected on the list.

#### New Submission

- Allow all file types
- Exclusive: Allow all file types on the list except the ones selected.

Open Office PowerPoint (OPD)	
Open Office Word (ODT)	
Open Office Excel (ODS)	
Compiled LaTeX File (DVI)	
TIFF Image (TIF TIFF)	
TeX Supporting File (STY BST BIB BBL CLS CLO PRO CFG)	
MacDraw PICT (PCT PICT)	

- Inclusive: Allow only these files types

Open Office PowerPoint (OPD)	
Open Office Word (ODT)	
Open Office Excel (ODS)	
Compiled LaTeX File (DVI)	
TIFF Image (TIF TIFF)	
TeX Supporting File (STY BST BIB BBL CLS CLO PRO CFG)	
MacDraw PICT (PCT PICT)	

#### Revised Submission

- Allow all file types
- Exclusive: Allow all file types on the list except the ones selected.

Open Office PowerPoint (OPD)	
Open Office Word (ODT)	
Open Office Excel (ODS)	
Compiled LaTeX File (DVI)	
TIFF Image (TIF TIFF)	
TeX Supporting File (STY BST BIB BBL CLS CLO PRO CFG)	
MacDraw PICT (PCT PICT)	

- Inclusive: Allow only these files types

Open Office PowerPoint (OPD)	
Open Office Word (ODT)	
Open Office Excel (ODS)	
Compiled LaTeX File (DVI)	
TIFF Image (TIF TIFF)	
TeX Supporting File (STY BST BIB BBL CLS CLO PRO CFG)	
MacDraw PICT (PCT PICT)	

Cancel

Submit

---

# File Type Limits on Submission

RoleManager permission allows Editor and Publisher Roles to bypass file restriction.

Can restrict files types for New Submission and Revised Submission separately.

Companion files uploaded on *Attach Files* page will be subject to the file type restrictions.

Files already uploaded to existing submissions are not affected by file restrictions – no prompt to change file.

The following functions ignore restrictions: Productions Tasks, Attachments, File Inventory, Transmittal Form.

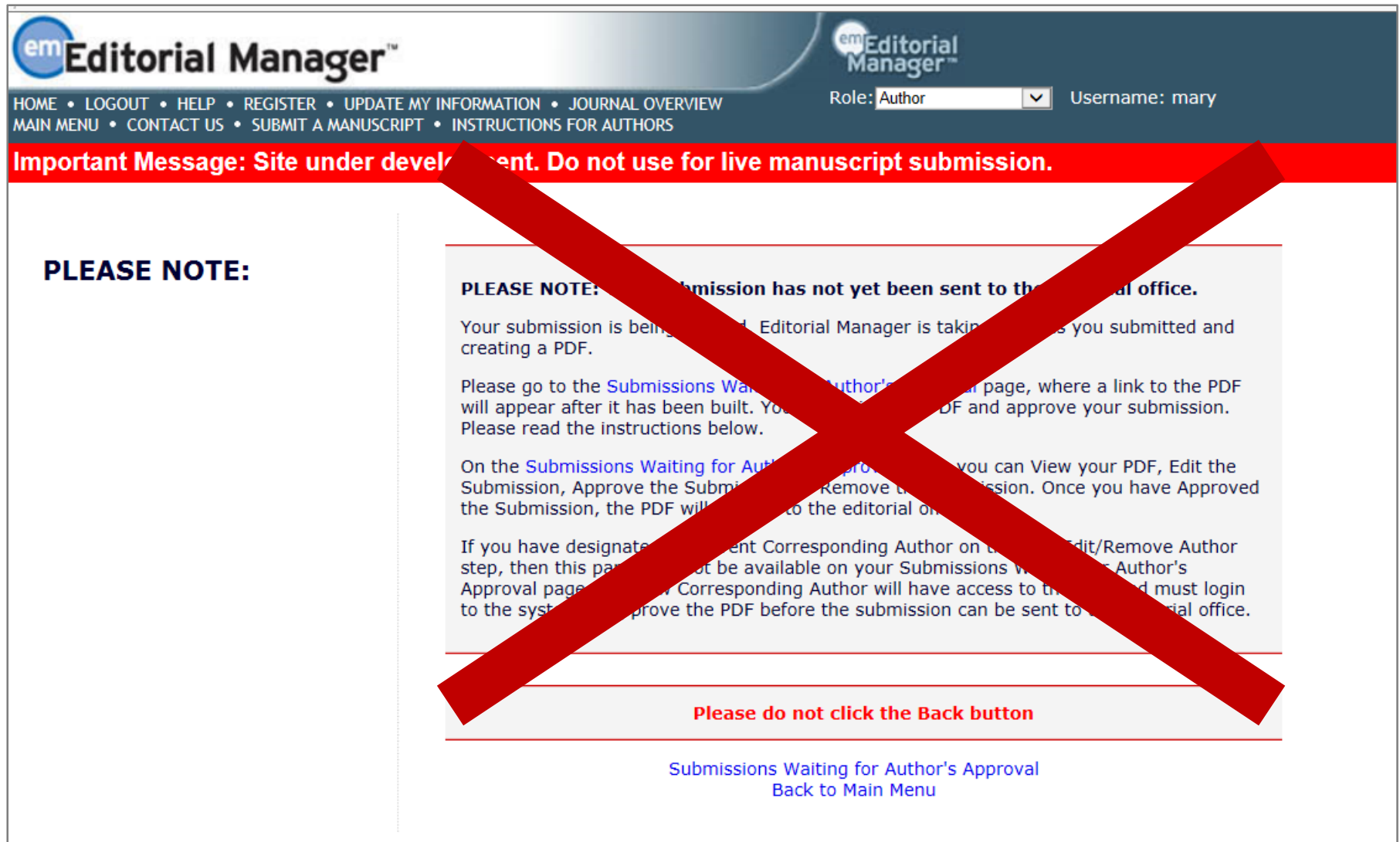
---

## Customized Text on *Build PDF* “Wait” Page

Instructions that appear on each step of the Submit Manuscript interface are customizable EXCEPT for the *Build PDF* “wait” page. This page can confuse users and publications would like to be able to craft their own message at this point in the workflow.

**SOLUTION:** The instructions on the *Build PDF* “wait” page are now customizable.

# Customized Text on PDF Build “Wait” Page



The screenshot displays the Editorial Manager interface. At the top left is the 'em Editorial Manager™' logo. A navigation bar contains links: HOME • LOGOUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW • MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS. On the top right, the user's role is 'Author' and the username is 'mary'. A red banner across the top reads: 'Important Message: Site under development. Do not use for live manuscript submission.'

On the left side, there is a section titled 'PLEASE NOTE:'. The main content area is a grey box with a red border, containing the following text:

**PLEASE NOTE:** Your submission has not yet been sent to the editorial office.

Your submission is being processed. Editorial Manager is taking the files you submitted and creating a PDF.

Please go to the [Submissions Waiting for Author's Approval](#) page, where a link to the PDF will appear after it has been built. You will need to view the PDF and approve your submission. Please read the instructions below.

On the [Submissions Waiting for Author's Approval](#) page, you can View your PDF, Edit the Submission, Approve the Submission, or Remove the Submission. Once you have Approved the Submission, the PDF will be sent to the editorial office.

If you have designated a Corresponding Author on the Edit/Remove Author step, then this page will not be available on your Submissions Waiting for Author's Approval page. The designated Corresponding Author will have access to this page and must login to the system to approve the PDF before the submission can be sent to the editorial office.

At the bottom of the grey box, there is a red text instruction: 'Please do not click the Back button'. Below the grey box are two blue links: 'Submissions Waiting for Author's Approval' and 'Back to Main Menu'.

---

## Customized Text on *Build PDF* “Wait” Page

The publication can customize the instructions that appear between the red lines for the following:

- Author submitting/editing a new or revised submission
- Editor editing a submission
- Publisher editing a submission
- Editor creating an editorial submission
- Editor creating a proposal

Default instructions still exist and can be restored.

Default instructions have been modified for consistent terminology and style.



# Customized Text on *Build PDF* “Wait” Page

Insert Special Character		
<p><b>Manuscript Submission Step</b></p> <p><b>Building PDF page</b> (For Author submitting/editing a new submission/revision)</p> <p>View Default Instructions</p>	<p><b>New Submission Instructions</b></p> <p>Your submission is being created. Editorial Manager is taking the files you submitted and creating a PDF.&lt;br /&gt;&lt;br /&gt;Please go to the &lt;i&gt;Submissions Waiting for Author's Approval&lt;/i&gt; page, where a link to the PDF will appear after it has been built. You must view the PDF and approve your submission. Please read the instructions below.&lt;br /&gt;&lt;br /&gt;On the &lt;i&gt;Submissions Waiting for Author's Approval&lt;/i&gt; page, you can View your PDF, Edit the Submission,</p> <p>Revert to Default Instructions</p>	<p><b>Revised Submission Instructions</b></p> <p>Your submission is being created. Editorial Manager is taking the files you submitted and creating a PDF.&lt;br /&gt;&lt;br /&gt;Please go to the &lt;i&gt;Revisions Waiting for Author's Approval&lt;/i&gt; page, where a link to the PDF will appear after it has been built. You must view the PDF and approve your submission. Please read the instructions below.&lt;br /&gt;&lt;br /&gt;On the &lt;i&gt;Revisions Waiting for Author's Approval&lt;/i&gt; page, you can View your PDF, Edit the Submission, Approve the</p> <p>Revert to Default Instructions</p>
<p><b>Building PDF page</b> (For Editor editing a submission)</p> <p>View Default Instructions</p>	<p>When it is complete, you must go to the &lt;i&gt;Submissions Needing Approval by Editor&lt;/i&gt; page (you can use the link below), and View the submission PDF for accuracy and completeness before taking additional action. You may then take one of the following actions:&lt;br /&gt;&lt;ol&gt;&lt;li&gt;Approve Submission - if you are satisfied with the PDF, and do not require the Author's approval. The submission will move back to the folder it was in before you chose to</p> <p>Revert to Default Instructions</p>	<p>When it is complete, you must go to the &lt;i&gt;Submissions Needing Approval by Editor&lt;/i&gt; page (you can use the link below), and View the submission PDF for accuracy and completeness before taking additional action. You may then take one of the following actions:&lt;br /&gt;&lt;ol&gt;&lt;li&gt;Approve Submission - if you are satisfied with the PDF, and do not require the Author's approval. The submission will move back to the folder it was in before you chose to</p> <p>Revert to Default Instructions</p>
<p><b>Building PDF page</b> (For Publisher editing a submission)</p> <p>View Default Instructions</p>	<p>When it is complete, you must go to the &lt;i&gt;Submissions Needing Approval by Publisher&lt;/i&gt; page (you can use the link below), and View the submission PDF for accuracy and completeness before taking additional action. You may then take one of the following actions:&lt;ol&gt;&lt;li&gt;Approve Submission - if you are satisfied with the PDF, and do not require the Author's approval. The submission will move back to the folder it was in before you chose to</p> <p>Revert to Default Instructions</p>	<p>When it is complete, you must go to the &lt;i&gt;Submissions Needing Approval by Publisher&lt;/i&gt; page (you can use the link below), and View the submission PDF for accuracy and completeness before taking additional action. You may then take one of the following actions:&lt;ol&gt;&lt;li&gt;Approve Submission - if you are satisfied with the PDF, and do not require the Author's approval. The submission will move back to the folder it was in before you chose to</p> <p>Revert to Default Instructions</p>
<p><b>Building PDF page</b> (For Editor creating an editorial submission)</p> <p>View Default Instructions</p>	<p>A PDF is being created for your Editorial Submission.&lt;br /&gt;&lt;br /&gt;Please go to the &lt;i&gt;Editorial Submission In Progress&lt;/i&gt; folder (you can use the link below) to View the PDF and Approve the Submission. Once approved, you will be able to place the submission into the regular submission workflow, or if you have sufficient permissions, may choose to immediately Accept the submission for publication, triggering release to Production if</p> <p>Revert to Default Instructions</p>	
<p><b>Building PDF page</b> (For Editor creating/editing a proposal)</p>	<p>Editorial Manager is taking the files you submitted and creating a PDF.&lt;br /&gt;&lt;br /&gt;</p>	

---

# Watermarks and Branding on PDFs

PDFs of articles are often shared and customers would like to be able to brand the PDFs with publisher, society, or publication logos or messages.

**SOLUTION: Allow for watermarks and branding on PDFs generated by the system.**

# Watermarks and Branding on PDFs

The screenshot shows the Editorial Manager Administration interface in Google Chrome. The browser address bar displays `tw4.editorialmanager.com/laureldev120/admin/default.aspx`. The page header includes the Editorial Manager logo, navigation links (ROLEMANAGER, ACTIONMANAGER, POLICYMANAGER, ADMINMANAGER, ADMINISTRATION HELP), and user information (Role: Managing Editor, Username: OTucker).

Below the header is a toolbar with several watermark and branding icons: CONFIDENTIAL, DO NOT DISTRIBUTE, REVIEWER PDF, and the Aries logo. There are also five generic image icons and an "Upload Image" button.

The main content area is divided into two panels:

- Author/Editor PDF**: Titled "Body pages - portrait", it shows a preview of a document page with a "DO NOT DISTRIBUTE" watermark. Below the preview is a "Transparency:" slider and a "Preview" button.
- Reviewer PDF**: Titled "Cover page", it shows a preview of a cover page with the Aries logo at the bottom. Below the preview is a "Transparency:" slider and a "Preview" button.

At the bottom of the interface are "Cancel" and "Save & Close" buttons.

---

## Security for Downloading Files via PDFs

Publications want to make the review process as easy as possible for Reviewers and Editors. However, this desire can come into conflict with the need to keep information and materials confidential. Especially with Authors posting their PDFs online and in repositories.

**SOLUTION: Provide an option for publications to require a successful login before downloading files from the PDF.**

**Provide an option to build the Author-accessed PDF without live links to the source files.**


# Security for Downloading Files via PDFs

## 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.

**NOTE:** Companion File setting is no longer part of the PDF Handling settings.

---

## Access to Author/Editor & Reviewer PDF

Editor roles only have access to the Editor/Author version of the PDF. Editors and staff are left wondering if the Reviewer PDF contains the rights files and has been properly anonymized.

**SOLUTION: Provide access to both versions of the PDF so they can be inspected to ensure correct contents and blinding.**

# Access to Author/Editor & Reviewer PDF

RoleManager Permission allows Editor access to Reviewer PDF.

Viewing Reviewer PDF can be required when the Editor rebuilds the PDF.

Quicklinks

## Revised Submissions - Mary François Smith, PhD

Contents: These are the revised submissions that require Technical Check. Use the up/down arrows to change the sort order.

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

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Decision
<a href="#">View Submission Details</a> <a href="#">Initiate Discussion History</a> <a href="#">Technical Check</a> <a href="#">View QC Results</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Send Back to Author Classifications</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">View Reviews and Comments</a> <a href="#">Similar Articles in MEDLINE</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-03-00092R1						006 M	Revision Received to Journal	Major Revision

### Select a PDF Version

<b>Author/Editor PDF</b>	<b>Reviewer PDF</b>
Revision 1	Revision 1
Original Submission	Original Submission

Close

# Access to Author/Editor & Reviewer PDF

**File Inventory for Manuscript Number: DEMOMD112-D-15-00005R1**  
**Michael Di Natale (UNITED STATES): "13.0-10 Mockup"** ([View Submission](#))

Listed below are the files included in the current version of the latest Revision of the submission. ([more...](#))

[Download Selections as Zip File](#) [CrossCheck](#) [Close](#)

**Submission PDFs**

Check All	Action	Description	Revision Number	Size	Modified
<input type="checkbox"/>	<a href="#">Download</a>	Author/Editor PDF	1	7.7 MB	Feb 20 2015 5:55:
<input type="checkbox"/>	<a href="#">Download</a>	Reviewer PDF	1	5.7 MB	Feb 21 2015 5:55:
<input type="checkbox"/>	<a href="#">Download</a>	Author/Editor PDF	0		
<input type="checkbox"/>	<a href="#">Download</a>	Reviewer PDF	0		

**Select a PDF Version**

**Author/Editor PDF**

Revision 1

Original Submission

**Reviewer PDF**

Revision 1

Original Submission

[Close](#)

**Submission Files**

Check All	Action	Item	Description
<input type="checkbox"/>	<a href="#">Download</a>	Manuscript	Manuscript

**Companion Files** [Upload Companion File](#)

Check All	Action	Item	Description <small>(Limit 256 characters)</small>	Item Family	File Name	Size	Modified	Open
Clear All		▲▼	▲▼ <small>Expand All Collapse All</small>	▲▼	▲▼	▲▼	▲▼	▲▼
<input type="checkbox"/>	<a href="#">Download</a> <a href="#">Replace</a> <a href="#">Hide</a>	Companion File		Document	Author_Tutorial.doc	5.2 MB	Apr 24 2015 2:16:51:26 3PM	Michael Di Natale Manuscript Editor

[Hide Selected Companion Files](#) [Upload Companion File](#)

[Download Selections as Zip File](#) [Close](#)



# Access to Author/Editor & Reviewer PDF

## Submissions Needing Approval by Editor - Mary François Smith, PhD

If no Actions appear for your submission, please wait a few minutes for your PDF to be built. The Actions appear automatically when your PDF is built. Within a few minutes, click the refresh button on your browser.

Page: 1 of 1 (4 total submissions)

Display 10 results

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
<a href="#">View Submission</a> ⚠ <a href="#">View Reviewer PDF</a> ⚠ <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Approve Submission</a> <a href="#">Send Back to Author</a> <a href="#">Revert Submission</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>		Original Study	Test Co-Author Parameters	13.0-23 Check Statuses after Transfer Complete - CAMBRIDGE	Maney M. Alexander, xyz PhD ✓	Nov 11 2015 12:05PM	Nov 11 2015 12:05PM	Rejected
<a href="#">View Submission</a> ⚠ <a href="#">View Reviewer PDF</a> ⚠ <a href="#">View Reference Check</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Approve Submission</a> <a href="#">Send Back to Author</a>		Original Study		and verified on Site A - is confirmation transferred to Site	Maney M. Alexander, xyz PhD ✓	Oct 21 2015 10:08AM	Oct 21 2015 10:08AM	Transfer Submitted Rejected

**Warning** ✕

This version of the PDF must be viewed prior to approval. (more...)

---

# Power Grid Expansion

The new customizable grid will be expanded to additional pages

- *Search Proposals*
- *View All Submissions in Production*
- *Production Status Grid*
- *Submissions out for Revision*
- *All Submissions with Editors Decision*

---

## Proxy as User after Proxy Registering Them

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.

# Proxy as User after Proxy Registering Them



**Proxy Registration Complete Confirmation**

You have successfully registered Teddy Tester [user@domain.com].

Proxy as: **[Author]** **[Reviewer]**

[Editor Main Menu](#)

Restriction: Not available following Author or Reviewer proxy registration, as this would interrupt the invitation/assignment workflow.

---

# Change Status when Changing Required Reviewers Count

When the Required Number of Reviews setting is increased, the status of the submission does not revert back to “Under Review”, which can be confusing to Editors.

**SOLUTION:** This new feature allows the user to increase the number of required reviews via the *Reviewer Selection Summary* page and have the Editorial Status change immediately without having to take any additional actions.

---

# Change Status when Changing Required Reviewers Count

## Change Number of Required Reviews

Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as  review(s) have been completed.

Cancel

Save and Close

# Change Status when Changing Required Reviewers Count

## Reviewer Assigned

Event	New Document Status	Warnings	Alternative Text for Authors																																																																																																		
Request Unregistered Reviewer	No Change																																																																																																				
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Required Reviews Complete	Required Reviews Completed																																																																																																				
Required Reviews Reset	Under Review																																																																																																				

# Change Status when Changing Required Reviewers Count

## Reviewer Assigned

Event	Editor Letters
Request Unregistered Reviewer	NONE

### CORRESPONDENCE HISTORY

Add Editorial Correspondence

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Apr 16 2015 10:22:46:466AM	<a href="#">Editor Notice: Required Reviews Complete</a>	Michael Di Natale, M.D.	Required Reviews Completed	0	Michael Di Natale, M.D.
Apr 15 2015 1:46:567PM	<a href="#">Reviewer Agree Notification</a>	Michael Di Natale, M.D.	Under Review	0	Joe REaves
Apr 15 2015 1:40:507PM	<a href="#">Reviewer Invitation</a>	Joe REaves	Under Review	0	Michael Di Natale, M.D.
Mar 10 2015 1:33:20:690AM	<a href="#">Editor Invitation</a>	Michael Di Natale, M.D.	Editor Invited	0	Michael Di Natale, M.D.

Un-invite Reviewers Before Agreeing to Review	NONE
Un-assign Reviewers After Agreeing to Review	NONE
Promote Alternate Reviewers	NONE
Re-open Review	NONE
Review Assignment Completed	NONE
Required Reviews Complete	Editor Notice All Reviews Complete
<b>Required Reviews Reset</b>	Editor Notice More Reviews Needed



---

# Invited Submissions Assigned to Schedule Groups

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

Article Type:

*Maximum Article Type name is 75 characters.*

Family: Proposal    Invited:     Editor Use Only:     Book-related:

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

## Edit Schedule Group Details/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
+Additional Manuscript Details								
<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
+Additional Manuscript Details								

### 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 Wippert

---

# Predefine Title for Invited Submissions

When Authors are asked to submit manuscripts for things like special issues, review articles and book-type publications they are asked to enter a title when they submit their files. The title is often predetermined by the publication, and leaving it up to the Author can sometimes result in misnamed submissions that must be edited by the editorial office.

**SOLUTION:** When inviting an Author to submit an article, Editors can now provide titles that the Author may or may not change at time of submission.

**NOTE:** This is already possible for Article Type!

---

# Predefine Title for Invited Submissions

Configuration allowing the Editor to predefine Title:

Article Type setting determines if predefined titles are allowed by default.

Allow Editor to predefine submission title values:

- Provided titles are initially unlocked (Author can change)
- Provided titles are initially locked (Author cannot change)

---

# Predefine Title for Invited Submissions

Configuration allowing the Editor to predefine Title:

RoleManager setting determines if an Editor can change the Article Type setting on-the-fly when inviting Authors.

## Proposals/Commentaries

Use Proposals Details Layout

- Search All Proposals
- Initiate Proposals
- Invite Authors/Solicit Commentaries
  - Select Alternate Authors
  - Promote Alternate Authors
  - Remove Alternate Authors
- Lock/Unlock Predefined Article Title
- Override Author Invited Submission Due Dates
- View All Proposals and Submissions with Commentaries

# Predefine Title for Invited Submission

## Select Authors - Confirm Selection and Customize Letters

You have selected the following people as potential Authors. [\(more...\)](#)

Authors to Invite					
Name	Letter / Invitation Notes To Author	Article Title	Invited Author Response Due Date	Author Submission Due	Do Not Invite
Thomas Marshall Aaberg, Jr, MD	Author Invited to Submit <span>Customize</span>	Full Title (Limit 200 Characters): Secondary Full Title: Short Title (Limit 50 Characters): Secondary Short Title: <input type="checkbox"/> Lock title(s) for Author	09/12/2015	45 45 Days After Author Accepts	<input type="checkbox"/>
Thomas Marshall Aaberg, Sr., M.D.,M.S.P.H.	Editorial/perspective invite <span>Customize</span>	Full Title (Limit 200 Characters): Secondary Full Title: Short Title (Limit 50 Characters): Secondary Short Title: <input type="checkbox"/> Lock title(s) for Author	09/12/2015	60 60 Days After Author Accepts	<input type="checkbox"/>

---

# Upload Author List File to Launch Invitation Process

Review journals, multi-authored works and other publications that invite lots of authors have to proxy register each potential new author one at a time. This is a long and arduous process!

**SOLUTION:** A new mechanism to upload a file containing the names and contact details of all of the potential authors. Once uploaded, the system creates People Records and Invitations so that the publication can invite those people to participate in the project.



# Upload Author List File to Launch Invitation Process

## Author Selection Summary - Manuscript TONYTEST40-D-05-00012 Prop example

Manuscript Details

### Author Search



Search My Publication

Go

- Search for Authors
- Search by Personal Classifications
- Upload Author List
- Search for Alternate Authors
- Search for Alternate Authors by Personal Classifications

### Selected Authors

#### Invited Authors

Becky Haines 	Author Invited - May 27 2008 11:50AM	<a href="#">View Letter</a>	<a href="#">Un-invite</a>
Lon Hildreth, MD 	Author Invited - May 27 2008 11:50AM	<a href="#">View Letter</a>	<a href="#">Un-invite</a>
Lyndon Holmes, DLE	Author Invited - May 27 2008 11:50AM	<a href="#">View Letter</a>	<a href="#">Un-invite</a>

# Upload Author List File to Launch Invitation Process

Author List File (ALF) must be in the following formats:

- Comma Separated Value (\*.csv, \*.txt)
- Tab Delimited File (\*.tab, \*.txt)

**Author List File - Manuscript TONYTEST40-D-05-00012**  
**Prop example**

## Upload Author List

Use this option to upload a list of potential Authors from a file which includes their First Name, Last Name, Email Address, and optionally, a description of the material they will be asked to author and an ORCID iD. ([more...](#))

Browse your computer:

Choose File


Or Drag & Drop a File Here



**No Author List File has been uploaded for this submission.**

# Upload Author List File




## Author Candidates

The Author Candidates found in the uploaded file are displayed below. If any errors exist within the provided data they are highlighted with a warning icon. Depending on the issue with the data, the offending record may not be imported. Rolling over the  icon where an issue has been discovered will provide information about the issue. The 'Ignore' option can be used to exclude Authors before importing the list.

To load the approved records into the 'Author Candidates' grid chose 'Import'. Choose the 'Remove' option to remove your file so that you may correct any issues and upload the file again.

Remove

Import

Invitation	FIRSTNAME	LASTNAME	EMAIL	ORCID	TITLE	NOTE	Ignore
True	Mike	Di Natale	mdinatale@ariessys.com;mdinatale@gmail.com	0000-0002-0136-5875	Chapter 4	Completing chapter 1 should be your first priority	<input type="checkbox"/>
True	Terry	Badman	tbadman[at]ariessys[dot]com 		Chapter 10		<input checked="" type="checkbox"/>
True	Kate	Horgan	khorgan@ariessys.com		Chapter 21		<input type="checkbox"/>
			bookauthor@books.org				<input checked="" type="checkbox"/>
True		Badman	tbadman@ariessys.com		Chapter 11		<input checked="" type="checkbox"/>

Editor will see an analysis of the data and can either “Remove” or “Import” the file







# Upload Author List File

## Author Candidates

Check the box for each person you want to invite to submit, and then proceed

Page: 1 of 1 (3 total Author Candidates)

Select All / Clear All

Select	Number of Invitation Letters	Author Name	Board Member	Submissions Being Processed		Author Statistics
				Invited	Unsolicited	
<input checked="" type="checkbox"/>	3	<b>Confirmed EM Match:</b> <a href="#">Abe J. Abelard</a>  <b>Information from File:</b> Abe Abelard <a href="mailto:aabelard@abelard.com">aabelard@abelard.com</a> Component: The Basics Component: Delving Deeper	No			<b>Agreed and Awaiting Submission:</b> <b>Invited Submissions Received:</b> <b>Un-invited Before Agreeing:</b> <b>Un-invited After Agreeing:</b> <b>Last Invited Submission Agreed:</b> - <b>Last Invited Submission Received:</b> - <b>Last Invited Submission Declined:</b> - <b>Avg Days to Submit:</b>
<input checked="" type="checkbox"/>	1	<b>No Match:</b>  <b>Information from File:</b> Buzz Aldrin <a href="mailto:buzzy@nasa.gov">buzzy@nasa.gov</a> Component: Beyond the Basics				
<input checked="" type="checkbox"/>	1	<b>Confirmed EM Match:</b> <a href="#">Maney M. Alexander, xyz PhD</a>       <b>Information from File:</b> Maney Alexander <a href="mailto:maney_alexander@bc.edu">maney_alexander@bc.edu</a> Component: Higher and Drier  Author Invited - Dec 8 2014 2:19PM  Author Invited - Dec 8 2014 2:19PM	No	0	170	<b>Agreed and Awaiting Submission:</b> 0 <b>Invited Submissions Received:</b> 0 <b>Un-invited Before Agreeing:</b> 9 <b>Un-invited After Agreeing:</b> 1 <b>Last Invited Submission Agreed:</b> Apr <b>Last Invited Submission Received:</b> - <b>Last Invited Submission Declined:</b> - <b>Avg Days to Submit:</b> 0

# Upload Author List File

## Select Authors - Confirm Selection and Customize Letters

You have selected the following people as potential Authors. ([more...](#))

### Authors to Invite

Name	Letter / Invitation Notes To Author	Article Title	Invited Author Response Due Date	Author Submission Due	Do Not Invite
<a href="#">Thomas Marshall Aaberg, Jr, MD</a>	Author Invited to Submit <a href="#">Customize</a> <input type="text"/>	Full Title: <input type="text"/> <input type="checkbox"/> Lock title(s) for Author	09/12/2015 <input type="text"/>	45 45 Days After Author Accepts	<input type="checkbox"/>
<a href="#">Thomas Marshall Aaberg, Sr., M.D.,M.S.P.H.</a>	Editorial/perspective invite <a href="#">Customize</a> <input type="text"/>	Full Title: <input type="text"/> <input type="checkbox"/> Lock title(s) for Author	09/12/2015 <input type="text"/>	60 60 Days After Author Accepts	<input type="checkbox"/>

---

## Automated Reminders for Invited Authors

Reminding Invited Authors is a manual process. As with any manual process, it is highly flexible, but it is also fraught with opportunities for error.

**SOLUTION:** A new automated reminder function has been added to the Proposals and Commentaries feature, similar to what already exists for Reviewer Invites and Assignments, Author Revisions and Production Tasks.

- Have been invited to submit a paper, but have not accepted
- Have agreed, but have not submitted their manuscripts yet

# Automated Reminders for Invited Authors

## Automated Author Invitation Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Author Invitation reminder e-mails will be sent once every 24 hours to each recipient.

<b>Reminder Type:</b>	<input checked="" type="radio"/> <b>Outstanding Invitations:</b> Send an automated reminder e-mail to Authors who were invited to submit for a Proposal or for a Commentary on another submission exactly <input type="text" value="10"/> days ago. If Authors have already agreed to or declined the invitation, they will not receive a reminder.
	<input type="radio"/> <b>Reminder Before Invitation Response Due Date:</b> Send an automated reminder e-mail for invitations that are exactly <input type="text" value="7"/> days before their Invitation Response Due Date. Reminders will be sent to Authors who have not agreed to or declined their invitation yet.
	<input type="radio"/> <b>Reminder Past Invitation Response Due Date:</b> Send an automated reminder e-mail for invitations that are exactly <input type="text" value="7"/> days past their Invitation Response Due Date. To send reminders for invitation responses that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who have not agreed to or declined their invitation yet.
	<input type="radio"/> <b>Outstanding Submissions:</b> Send an automated reminder e-mail to Authors who agreed to submit for a Proposal or for a Commentary on another submission exactly <input type="text" value="10"/> days ago. If Authors have already submitted their manuscript, they will not receive a reminder.
	<input type="radio"/> <b>Reminder Before Submission Due Date:</b> Send an automated reminder e-mail for invited submissions that are exactly <input type="text" value="7"/> days before their submission due date. Reminders will be sent to Authors who have agreed to their invitation, but have not submitted their manuscript yet.
	<input type="radio"/> <b>Reminder Past Submission Due Date:</b> Send an automated reminder e-mail for invited submissions that are exactly <input type="text" value="7"/> days past their submission due date. To send reminders for invited submissions that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who have agreed to their invitation, but have not submitted their manuscript yet.
<b>Invitation Type:</b>	<input type="text" value="Invitations to Respond to a Proposal"/>
<b>Handling Editor:</b>	<input type="text" value="(All Editors)"/>
<b>Reminder Name:</b>	<a href="#">Insert Special Character</a> <input type="text"/> <small>Maximum 200 characters</small>
<b>Reminder Letter:</b>	<input type="text" value="Please Choose an Automated Reminder Letter"/>
<p>You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.</p>	
<b>Proposal Article Type:</b>	<input type="text" value="Proposal for Editorial&lt;br/&gt;Proposal for Perspective"/> <a href="#">Clear All</a> <a href="#">Select All</a>
<b>Submission Article Type:</b>	<input type="text" value="Editorial&lt;br/&gt;Perspective&lt;br/&gt;Correspondence&lt;br/&gt;Reply to Correspondence"/> <a href="#">Clear All</a> <a href="#">Select All</a>
<b>Section/Category:</b>	<input type="text" value="Main Section&lt;br/&gt;Letters to the Editor&lt;br/&gt;Text Section&lt;br/&gt;Hidden Section (hidden)"/> <a href="#">Clear All</a> <a href="#">Select All</a>
<input type="button" value="Save as Automated Reminder"/>	

---

## ORCID iD Authenticate Deep Link

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.**



---

# Crystallography file QA tool “checkCIF”

There is a tool from the International Union of Crystallography called “checkCIF”. The checkCIF tool reports on the consistency and integrity of crystal structure determinations contained in the .cif file.

.cif was adopted in 1990 as a standard file structure for the archiving and distribution of crystallographic information.

- A user uploads a file with the extension .cif [Crystallographic Information Format], which is then examined by the tool
- A report on the file is generated in PDF format

# Crystallography file QA tool “checkCIF”

## 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 a file extension and content restriction on the uploaded file's extension or content. All uploaded files are checked for v

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

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](#)



# Crystallography file QA tool “checkCIF”

The .cif files are sent to the QA tool at key workflow points.

## Configure checkCIF

Configure the options below. Submit this page, then click the 'Edit Submission Item Types' link to select at least one Submission Item to be sent to the checkCIF tool. If you need to disable checkCIF, please unselect the checkbox labelled 'Enable checkCIF'.

Cancel

Submit

Enable checkCIF

Select the workflow points that will trigger checkCIF:

<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Original PDF Building By Author
<input type="checkbox"/>	Original PDF Building By Editor
<input type="checkbox"/>	First Reviewer Invited/Assigned for Original Submission
<input type="checkbox"/>	Revised PDF Building By Author
<input type="checkbox"/>	Revised PDF Building By Editor
<input type="checkbox"/>	Author Notified of Editor Decision in the 'Accept' Decision Family
<input type="checkbox"/>	Author Notified of Editor Decision in the 'Revise' Decision Family
<input type="checkbox"/>	Create Submission

# Crystallography file QA tool “checkCIF”

File Inventory Manuscript Number: DEMO-D-12-00001, DOI: 10.1234/DEMO-00001  
"Test full title" [\(View Submission\)](#)

Listed below are the files included in the current version of the latest Revision of the submission. [\(more...\)](#)

[Download Selections as Zip File](#) [CrossCheck: Selected Files](#) [CrossCheck: Reviewer PDF](#) [Close](#) [Save and Close](#)

[CrossCheck/iThenticate Results \(14%\)](#)  
[checkCIF Results](#)

Check All	Action	Item	Description	Item Family	File Name	Size	Modified	QC	Display On TF
<input type="checkbox"/>	<a href="#">Download</a>	Manuscript	Manuscript	Document	My resesarch paper.docx	546.5 KB	Sept 13 2015 8:47AM		✓
<input type="checkbox"/>	<a href="#">Download</a>	cif File	Structure	Supplemental	structure.cif	16.5 KB	May 26 2015 10:34AM	Testing in Progress	✓

### Search Submissions - Search Results

Manuscript Number is containing 'd'

[Save Search](#) [Download Search Results](#) [Search Again](#)

[Switch to Production View](#)

Page: 1 of 2 (148 total submissions) 1 2 >> >|

Action	Manuscript Number	DOI	Article Title	Article Type
<a href="#">View Reference Checking Results</a> <a href="#">CrossCheck/iThenticate Results (X)</a> <a href="#">checkCIF Results</a> <a href="#">Details</a> <a href="#">Initiate Discussion</a>	CAROLINETEST50-D-06-00002		Bug 12121 - totally new file	Original Stu

# Crystallography file QA tool “checkCIF”

## checkCIF Results - Submission CAROLINETEST120-D-06-00008 "This is my test article title"

Close

Re-Send Files to checkCIF

### Submission Files

Item Type	Item Description	File Name	Size	Date Tested	Actions	checkCIF Results
Crystallographic File	structure1	structure1.cif	16.8 KB	Jun 21, 2015	<a href="#">Download</a>	checkCIF Error
Crystallographic File	structure2	structure2.cif	20.3 KB	Jun 21, 2015	<a href="#">Download</a>	Testing in progress
Crystallographic File	structure3	structure3.cif	20.5 KB	Jun 21, 2015	<a href="#">Download</a>	Not yet tested
Crystallographic File	ministructure1	ministructure1.cif	138.5 KB	Jun 21, 2015	<a href="#">Download</a>	Completed

### Companion Files (not built into the PDF)

Item Type	Item Description	File Name	Size	Date Tested	Actions	checkCIF Results
Crystallographic File	structure4	structure4.cif	18.2 KMB	Jun 21, 2015	<a href="#">Download</a>	checkCIF Error
Crystallographic File	structure5	structure5.cif	26.5 KB	Jun 21, 2015	<a href="#">Download</a>	Completed

---

## Trigger APC API – Payment Due in Production Tracking

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

## 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

## 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="checkbox"/>		
<input type="text" value="2"/>	Edit Graphics <a href="#">[Edit]</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Copy Edit	<input checked="" type="checkbox"/>
<input type="text" value="3"/>	Composition <a href="#">[Edit]</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="text" value="4"/>	Author Proof <a href="#">[Edit]</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Composition	
<input type="text" value="5"/>	Final Files to Print <a href="#">[Edit]</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="text" value="6"/>	Final Files to Online Posting <a href="#">[Edit]</a>	<input type="checkbox"/>	<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.

---

## APC API Can Include Data from Custom Questions and 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 in the Submission Questionnaire feature or via AMDs. This allows for the collection on non-standard data to be passed to third party payment systems.

---

# APC API Can Include Data from Custom Questions and Additional MS Details Fields

Custom Questions can be associated with a Submission Questionnaire or an Author/Co-Author Questionnaire:

- Submission Questionnaire – response is passed as a single “key:value” pair
- Author/Co-Author Questionnaire –each Author’s response is passed as a single “key:value” pair , but Author’s First Name + Last Name and ORCID (if available) are used to differentiate the responses

Additional Manuscript Details fields are not associated with an Author, and the “key:value” pair will not include the First Name, Last Name or ORCID ID

# APC API Can Include Data from Custom Questions

## Add Custom Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented as part of submission, author verification or production task completion.

Cancel

Save and Close

Save and Add Another Question

[Open Special Character Palette](#)

**Question text:**  
What is your membership number?

*Part of page omitted*

### Integration Options i

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote
- Include in Publication Charges Metadata *(Please enter a Custom Metadata ID below)*

Custom Metadata ID: i

A9876-5678\_abcd



# 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	

---

# Import from S1 to EM/PM

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

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

- For transfer to EM, submission can be found in the Transferred Submissions folder
- 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

---

# New Schedule Group Family to Facilitate Book Processing

Today EM/PM is used to manage various types of book products. Some of the challenges users have faced include:

- Journal-centric terminology
- The need for multiple levels of nested content (book, units, sections, chapters, etc.)
- Capture and storage of metadata specific to books (e.g. Book Title, ISBN, Edition)
- Association of book metadata with all of the records of the components (units, sections, chapters, etc.)
- Assignment of chapters to units/sections (and books) prior to submission of the chapter
- Assignment of the chapter to authors



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# New Schedule Group Family to Facilitate Book Processing

In journal publishing, there is generally two levels, the “Issue” and the “Article”.

For book processing there are multiple levels.

For example, a standard multi-authored text book has at least 3 levels (eventually the functionality will support N-levels):

- The “Book” (a set of units/sections and chapters)
- The “Unit” or “Section” (a set of chapters or a set of invited material)
- The “Chapter” (or invited material).

Quick key to understanding the new book structure:

- The Book roughly equates to a Schedule Group in EM/PM
- The Unit/Section/Component roughly equates to a Proposal in EM – a container for invited submissions.
- The Chapter equates to an invited submission related to a Proposal

---

# New Schedule Group Family to Facilitate Book Processing

EM/PM is enhanced:

- Book-centric terminology
- Schedule Group “families” allow the creation of a “Book” entity at the beginning of the workflow, with associated metadata such as book title, ISBN and Edition number
- Associate a Proposal with a Schedule Group when the Proposal is initiated – SG metadata is then associated with the Proposal
- Associates a submission invitation with a Proposal and Schedule Group
- Books Details page

# THANK YOU!

Tony Alves, Director of Product Management



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# SHAPES



Submission Items can be configured to:

- Display
- Display
- Not display