Welcome to EMUG 2015

What's New! Versions 12.0 & 12.1

Tony Alves, Director of Product Management

bit.ly/EMUG15-Overview

em Editorial Manager®
www.editorialmanager.com

Aries systems
Publish Faster. Publish Smarter.

Version 12.0

Upgrades are underway!

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

Customizable Grids

Search Submission: Editorial, Proposals, Production, Linked

Optional - checkbox to enable "Beta Grid"

Customizable Grids

Customizable Grids

Customizable Grids

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	☑	☑
Manuscript Number	☐	☑
Author Name	☐	☑
Article Title	☐	☑
Article Type	☐	☑
Reviewers	☐	☑
Classifications	☐	☑
Current Status	☐	☑
Status Date	☐	☑
Initial Date Submitted	☐	☑
Handling Editor	☐	☑
Assigned Editors	☐	☑
Section Category	☐	☑
DOI	▣	☐
Short Title	▣	☐
Keywords	▣	☐

Cancel   Submit

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Submission Check for Revised and Invited Submissions

Authors sometimes mistakenly clicks <u>Submit New Manuscript</u> when they intend to submit a Revision or an Invited Manuscript

SOLUTION: When Author clicks <u>Submit New Manuscript</u>, the system checks if that author has any:

- Revisions in *Submissions Needing Revision* folder
- Invitations in *New Author Invitations* folder
- Accepted invites in *Accepted Invitations* folder

If "yes", an informational warning is displayed to Author, with a redirect to appropriate location

Submission Check for Revised and Invited Submissions

Are you submitting in response to the invitation below?   Yes   No

Commentary Invitation
"Ontological Consequences of Post-Creation Deletion of Critical Data Structures"

Response Due:
Jan 10 2015 12:00AM

Are you submitting one of the following?

Revision of:
"Lorem ipsum dolor sit amet, consectetur adipiscing elit morbi sed erat ac est pretium pulvinar non sit amet dui: cras sit amet lacus eu ante volutpat pharetra"

Due:
Jan 10 2015 12:00AM

Select & Continue

Response to:
"Ontological Consequences of Post-Creation Deletion of Critical Data Structures"

Due:
Jan 10 2015 12:00AM

Select & Continue

Response to:
"A new GPU-Accelerated Sparse Matrix-Vector Multiplication Algorithm"

Due:
Jan 10 2017 12:00AM

Select & Continue

Incomplete Submission:
"A new GPU-Accelerated Sparse Matrix-Vector Multiplication Algorithm"

Due:
Jan 17 2015 12:00AM

Select & Continue

Incomplete Revision:
"A new GPU-Accelerated Sparse Matrix-Vector Multiplication Algorithm"

Due:
2014 12:00AM

Select & Continue

Edit of:
"A new GPU-Accelerated Sparse Matrix-Vector Multiplication Algorithm"

Select & Continue

No, Start New Manuscript

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New Fields for Co-Authors on Submit Manuscript

Deceased Status: An Author may have passed away since the submission process began

Equal Contributor Status: Some published articles indicate that two or more contributing Authors were equal contributors and are recognized accordingly on the published article

Post-Publication Corresponding Author: When an article is published, the 'Post-Publication Corresponding Author' would be the person who should receive any correspondence (may be a different Author than the EM Corresponding Author)

New Fields for Co-Authors on Submit Manuscript

New Fields for Co-Authors on Submit Manuscript

Deceased Status: An Author may have passed away since the submission process began

New Fields for Co-Authors on Submit Manuscript

Equal Contributor Status: Either zero or two or more Authors share "equal contributor status". If only one Author has this designation, then the system prompts the user to identify at least one more before the submission can be completed.

New Fields for Co-Authors on Submit Manuscript

The Deceased Status, Equal Contributor Status, and Post-Publication Corresponding Author designation are available:

- In Custom Reports and EAR
- On *View Author Details* page
- On the Transmittal Form

The Corresponding Author can also be designated with Equal Contributor Status, and as a Post-Publication Corresponding Author

Multi-level FundRef Taxonomy

Current EM FundRef implementation allows the Author to identify all of the institutions that funded the research being presented

Grant numbers and the associated co-authors can also be identified

The FundRef ID, along with the other data, can be transmitted to downstream systems, like CrossRef and PubMed

Multi-level FundRef Taxonomy

Currently the Author can select any agency, whether or not it is a sub-agency of a larger organization

For example:

The Author selects "National Institutes of Health" from the dropdown, enters a Grant Number and associated Author, and then saves the record to the journal database

HOWEVER - the actual funding source is "National Eye Institute" which is a sub-agency of the "National Institutes of Health"

Multi-level FundRef Taxonomy

Multi-level FundRef Taxonomy

Multi-level FundRef Taxonomy

Multi-level FundRef Taxonomy

Multi-level FundRef Taxonomy

New Merge Field for Author Questionnaire

Sometimes a publication wants to include just a portion of the Author Questionnaire in letters – for example, to allow an Author to review Co-Author answers

SOLUTION: **%AUTHOR_QUESTIONNAIRE_SUBSET%** - Inserts a subset of questions and responses from the Author Questionnaire into letters

Existing **%AUTHOR_QUESTIONNAIRE%** merge field pulls questions and responses from the entire Author Questionnaire into letters

New Merge Field for Author Questionnaire

Configure Questionnaire

Enter a name for the Questionnaire in the 'Questionnaire Name' field. Custom Questions may be added to the Questionnaire by clicking the 'Add Custom Questions' button, selecting Custom Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save the Questionnaire and return to the Create Questionnaire page.

The %AUTHOR_QUESTIONNAIRE_SUBSET% merge field pulls in all of the selected Questions and Responses for all Authors on the submission (including the Corresponding Author). To specify questions/responses for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all questions you want to include. Note the %AUTHOR_QUESTIONNAIRE% merge field continues to pull in all questions and responses for the questionnaire.

Questionnaire Name: Stacey's Questionnaire 2 (50 characters maximum)

☐ Hide   When you **Hide** a Questionnaire, it will not be available for use with any Article Type.

Question Display Order:

Order	Question	Required for Submission	Include in Merge Field	Actions
1	T&F submission question....	☐	☐	Remove
2	Have you previously submitted your talk to a journal for publication?	☐	☐	Remove
3	What is the name of your cat?	☐	☐	Remove

Update Item Order

Add Custom Questions

Cancel   Save

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New Merge Field for Author Questionnaire

When using these Merge Fields in letters, the questions and responses are grouped by Author

When the same question is asked on multiple revisions, the most recent response is displayed

New Merge Field for Author Information

%ALL_AUTHORS_WITH_SELECTED_METADATA% - Inserts a subset of data related to the Corresponding Author and all Co-Authors

Contents of merge field is configured on the *Set Other Author Parameters* page in PolicyManager

Co-Author data is pulled from the Submission record, not from a People record

May be used in any editorial or production letter

New Merge Field for Author Information

Other Author Parameters

Include in Merge Field?

Parameter	Setting	Include
Set "Title" Text Entry Box Preference:	Hidden	☐
First Name	Require	☑
Set "Secondary First Name" Text Entry Box Preference:	Hidden	☐
Set "Middle Name" Text Entry Box Preference:	Optional	☑
Last Name	Require	☑
Set "Secondary Last Name" Text Entry Box Preference:	Hidden	☐
Set "Academic Degree(s)" Text Entry Box Preference:	Optional	☑
Set "Secondary Academic Degree(s)" Text Entry Box Preference:	Hidden	☐
Set "Affiliation " Text Entry Box Preference:	Optional	☐
Set "E-mail Address" Text Entry Box Preference:	Optional	☑
☐ Require unique e-mail addresses for all authors of a submission		
Set "ISNI" Text Entry Box Preference:	Hidden	☐
Set "ORCID" Text Entry Box Preference:	Hidden	☑
Set "PubMed Author ID" Text Entry Box Preference:	Hidden	☐
Set "ResearcherID" Text Entry Box Preference:	Hidden	☐
Set "Scopus Author ID" Text Entry Box Preference:	Hidden	☐
Set "Position" Text Entry Box Preference:	Hidden	☑
Set "Secondary Position" Text Entry Box Preference:	Hidden	☐
Set "Institution" Text Entry BoxPreference:	Hidden	☑
Set "Department" Text Entry Box Preference:	Hidden	☐
Set "Secondary Institution" Text Entry Box Preference:	Hidden	☐
Set "Secondary Department" Text Entry Box Preference:	Hidden	☐
Set "Street Address" Text Entry Box Preference:	Hidden	☑

New Merge Field for Author Information

Preview Letter - Verify Co-Author Metadata

Cancel   Print   Send E-Mail

Dear Dr. Decker,

Please confirm the information entered for each Co-Author.

1. Dr. Charlie Hansen, MD, PhD
E-mail Address: charlie@childrens.org
ORCID: 0000-0001-5882-6823
Position: Director of Laboratories
Institution: Boston Children's Hospital
Street Address: 300 Longwood Avenue
City: Boston,
State: MA
Country: USA
Equal Contribition Status: This Author is an equal contributor
Post-Publication Corresponding Author: No

2. Mr. Ronald Decker, MD
E-mail Address: ron@childrens.org
ORCID:
Position:
Institution: Boston Children's Hospital
Street Address: 300 Longwood Avenue, Fegan 11th Floor
City: Boston
State: Massachusetts 02115
Country: USA
Equal Contribition Status:
Post-Publication Corresponding Author:
Deceased Status: This Author is deceased

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Insert Letter Template Merge Fields

For convenience, a Merge Field palette can be used to click and insert merge fields into letter templates in Policy Manager

Each merge field will include an in-line description with usage hints

Insert Letter Template Merge Fields

Allow attachments

Letter Body: Insert Image | Insert Custom Merge Field | Insert System Merge Field

```
Ref.:  Ms. No. %MS_NUMBER%
%ARTICLE_TITLE%
%JOURNALFULLTITLE%

Dear %TITLE% %LAST_NAME%,

I am pleased to tell you that your work has now been accepted for publication
in %JOURNALFULLTITLE%.

It was accepted on %FINAL_EDITOR_DECISION_DATE%klklio/.

Comments from the Editor and Reviewers can be found below.

Thank you for submitting your work to this journal.

With kind regards

%EDITOR_NAME%
%EDITOR_ROLE%
%JOURNALFULLTITLE%
```

Insert Letter Template Merge Fields

Hide Letter Templates

Some Letter Templates become outdated, or are just for temporary use – however, once created and used, they persist forever.

SOLUTION: Letter Templates can be hidden

- Hidden Letter Templates are no longer included in letter selection dropdowns

- Hidden Letter Templates can be reinstated

- Letter Purpose and Letter Family columns can be sorted

Hide Letter Templates

Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title To create a new letter, click 'Add New Letter'. (more...)

Back to PolicyManager

| Add New Letter | Save Changes | Edit Image Files for HTML Letters |

Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format		HTML Format		All Formats
.01-Cancel Fee Letter to Author	Fees And Payments	⦿	Edit	○	Edit	Remove | Hide
.01-Correspondence about Fee To Author	Invite/Assign/Unassign Editor	○	Edit	⦿	Edit	Remove | Hide
.01-Deny Waiver to Author	Fees And Payments	○	Edit	⦿	Edit	Remove | Hide
.01-Grant Waiver Letter to Author	Fees And Payments	⦿	Edit	○	Edit	Remove | Hide
.01-Non-Submission Fees	Fees And Payments	⦿	Edit	○	Edit	Remove | Hide
.01-Payment Due Letter to Author	Fees And Payments	⦿	Edit	○	Edit	Remove | Hide
.01-Payment/Bill me Letter from Author	Enterprise Analytics Reporting	⦿	Edit	○	Edit	Remove | Hide
00-Editor Notice of Alt. Reviewer Promotion	General	⦿	Edit	○	Edit	Remove | Hide
0-Artwork Cancellation	Production	○	Edit	⦿	Edit	Remove | Hide
0-Artwork Completion	Production	⦿	Edit	○	Edit	Remove | Hide
0-Assign Artwork Task	Production	○	Edit	⦿	Edit	Remove | Hide
0-Assign Task-Text Markup	Production	○	Edit	⦿	Edit	Remove | Hide
0-Copy Editing Completed	Production	⦿	Edit	○	Edit	Remove | Hide

Hide Letter Templates

Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title To create a new letter, cli

Back to PolicyManager

| Add New Letter | Save Changes | Edit Image Files for HTML Letters |

Letter Purpose ⚠ ▼	Letter Family Group by: ⚠ ▼	Tex
.01-Cancel Fee Letter to Author	Fees And Payments	◉
.01-Correspondence about Fee To Author	Invite/Assign/Unassign Editor	○
.01-Deny Waiver to Author	Fees And Payments	○
.01-Grant Waiver Letter to Author	Fees And Payments	◉
.01-Non-Submission Fees	Fees And Payments	◉
.01-Payment Due Letter to Author	Fees And Payments	◉
.01-Payment/Bill me Letter from Author	Enterprise Analytics Reporting	◉
00-Editor Notice of Alt. Reviewer Promotion	General	◉

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Search Manuscript Notes in Search Submissions

Manuscript Notes will be added to the Criterion drop-down list on the *Search Submissions Selection Criteria* page.

(Similar to existing search Production Notes functionality)

Suppress Notify Editor Link

There is a (vestigial) Action Link called <u>Notify Editor</u>. It serves a very simple purpose, to send an e-mail to the current Handling Editor.

<u>Send E-mail</u> Action Link (also known as Send *Ad Hoc* Letters) provides superior functionality.

New configuration option to hide the <u>Notify Editor</u> Action Link.

Manuscript Ingest – ProduXion Manager

Some ProduXion Manager customers use non-EM peer review systems (believe it or not)

Today there are some proprietary import methods used to get papers from these other systems in to PM – but again – these are proprietary

SOLUTION: Aries has developed a "generic" method that anyone can use

Manuscript Ingest

Peer Review
System
FTP's Files
and JATS
metadata

PM
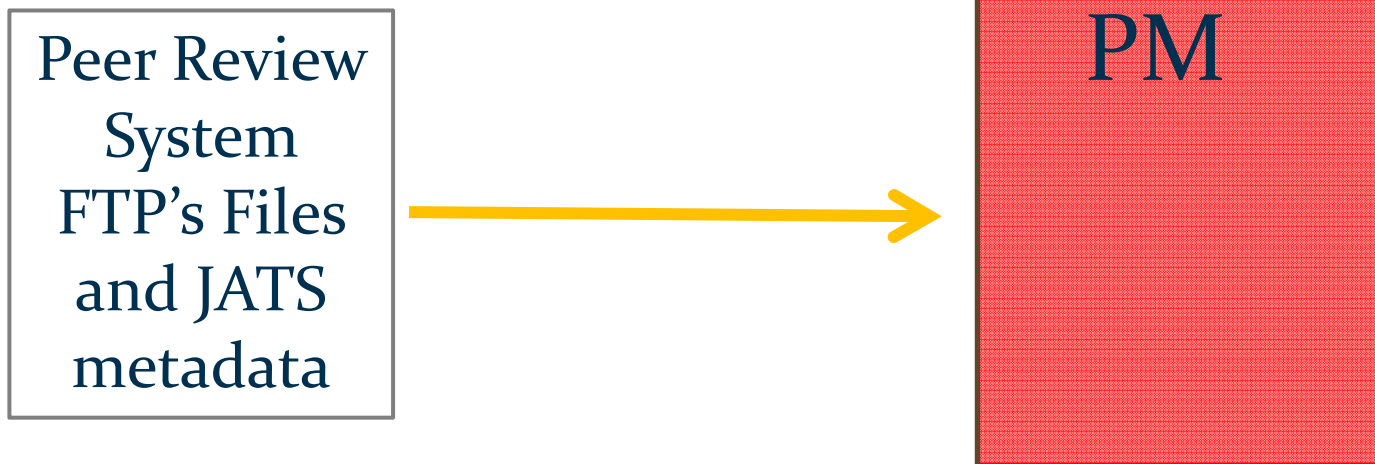
Manuscript Ingest – ProduXion Manager

Submissions can be imported into ProduXion Manager from non-EM peer review systems

Data must be in XML, formatted to JATS 1.1 DTD

Data and files are FTP'd to PM

Submission is found in the *Production Initiated – No Tasks Assigned* OR, if a task is configured to be automatically assigned when production is initiated, *Production Tasks Assigned to Me/Submission Production Tasks I have Assigned* folders

In all cases the submission appears in the *View All Submissions in Production* folder

Additional Production Automation

Task A	Automatically triggers →	Task B

Existing Functionality

Task A	Automatically triggers →	Task B
	↘	Task X
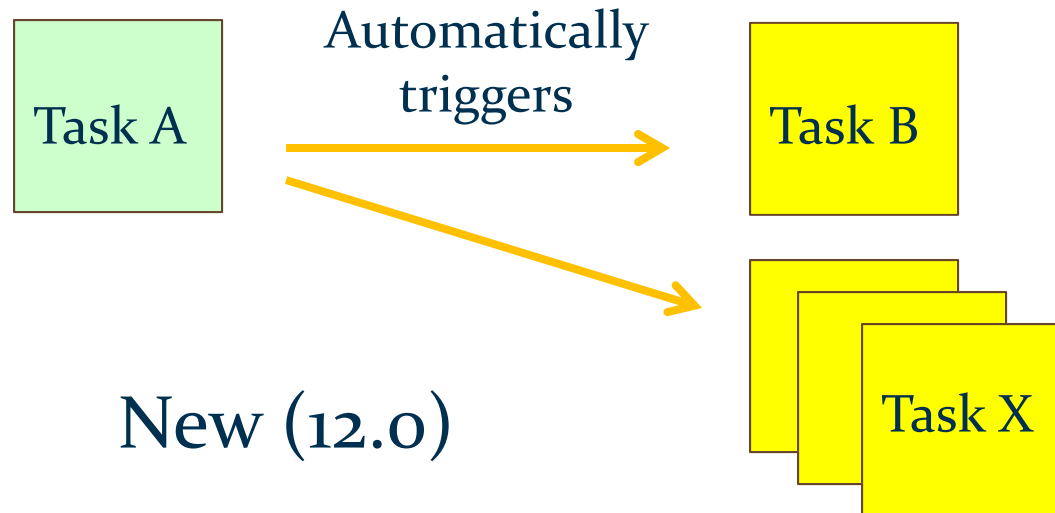
New (12.0)

Additional Task Automation

Example automation:
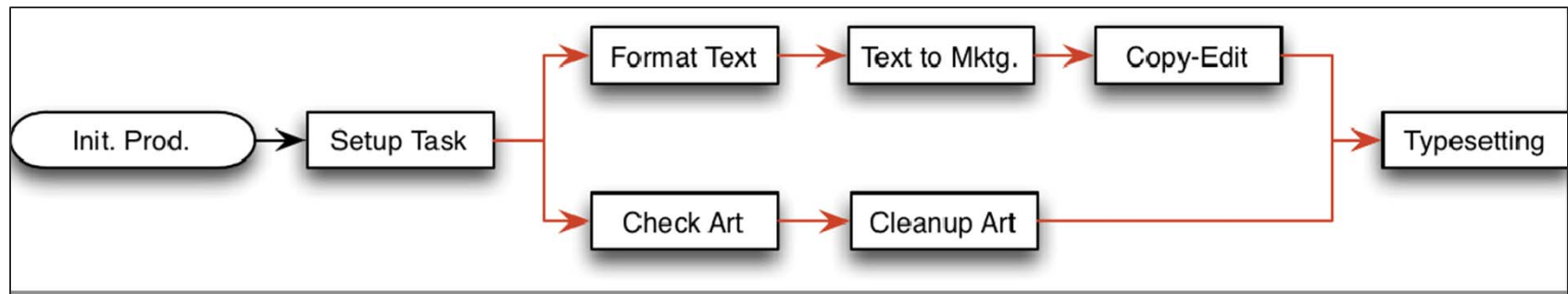
Automated Production Reminders

Automated Submission Tasks Reminder (for production tasks related to submissions)

Automated Schedule Group Tasks Reminder (for production tasks related to Issues)

RoleManager permission for Editor and Publisher roles

Saved reports can be edited and deleted (by creator)

Automated Production Reminders

Automated Submission Tasks Reminder Reports

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

|	
Reminder Type:	⦿ **Outstanding Submission Production Tasks:** Send an automated reminder e-mail to users who were assigned a Submission Production Task `7` days ago. If users have already completed their task, they will not receive a reminder. ◯ **Reminder Before Selected Date Type:** Send an automated reminder e-mail to users whose open, assigned Submission Production Task is exactly `10` days before the selected Date Type. ◯ **Reminder Past Selected Date Type:** Send an automated reminder e-mail to all users whose open, assigned Submission Production Task is exactly `7` days past the selected Date Type. To send reminders for tasks that are due on the day the reminder report is run, enter 0 days.
Production Task:	(All Production Tasks) ▾
Schedule Group:	(All Schedule Groups) ▾
Reminder Name:	Insert Special Character [ ] *Maximum 200 characters*
Reminder Letter:	Please Choose an Automated Reminder Letter ▾

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.

Assigned To:	Author Copy Editor Production Team Associate Editor	Select All Clear All
Article Type:	Original Study Brief Report Editorial Perspective	Select All Clear All
Section/Category:	Main Section Letters to the Editor Test Section Hidden Section (hidden)	Select All Clear All

Save as Automated Reminder

Automated Production Reminders

Automated Schedule Group Tasks Reminder Reports

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

Reminder Type:	○ **Outstanding Schedule Group Production Tasks:** Send an automated reminder e-mail to users who were assigned a Schedule Group Production Task `7` days ago. If users have already completed their task, they will not receive a reminder. ⦿ **Reminder Before Selected Date Type:** Send an automated reminder e-mail to users whose open, assigned Schedule Group Production Task is exactly `10` days before the selected Date Type. ○ **Reminder Past Selected Date Type:** Send an automated reminder e-mail to all users whose open, assigned Schedule Group Production Task is exactly `7` days past the selected Date Type. To send reminders for tasks that are due on the day the reminder report is run, enter 0 days.
Date Type:	Schedule Group Production Task Due Date ▾
Production Task:	(All Production Tasks) ▾
Schedule Group:	(All Schedule Groups) ▾
Reminder Name:	Insert Special Character [ ] *Maximum 200 characters*
Reminder Letter:	Please Choose an Automated Reminder Letter ▾

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.

|	
Assigned To:	Author Copy Editor Production Team Associate Editor Select All Clear All

Save as Automated Reminder

Automated Production Reminders

Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them.

Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the 'Drag & Drop' tool.

	Reminder Name	Reminder Type	Number of Days	Reminder Creator
🗑 ✏	Open Production Tasks Assigned 10 days ago	Outstanding Submission Production Tasks	10	Mary Smith, MD
	Submission Task Due in 10 days from SG Target Online Pub Date	Reminder Before Schedule Group Target Online Publication Date	10	Joe Sample, MD

Cancel Tasks – Closing Schedule Groups

Completing the production process can be burdensome because all Submission Production Tasks must first be closed manually

SOLUTION: When closing an Issue (schedule group) the user can automatically close all open Submission Production Tasks

RoleManager permission for Editor and Publisher roles

Cancel Tasks – Closing Schedule Groups

The "Seahorses English Issue" Schedule Group has open production tasks associated with it:

- 3 Submissions have open submission production tasks.
    - Click this Production Status Grid link to cancel the Close Group process and switch to a list of the production tasks associated with this Schedule Group.

- 2 Schedule Group Production Tasks are still in progress.
    - Click this History link to display information for this Schedule Group.

To cancel these tasks automatically and close the group, click one of the following buttons depending on whether you want to send cancellation letters. Submissions that have no open tasks but are still in production will have production ended on them.

[Close Group and Send Letters]

[Close Group without Sending Letters]

To leave the group open without cancelling any tasks, click 'Do Not Close Group'.

[Do Not Close Group]

Search Submission – Publisher Role

Users with a Publisher Role can Search Submissions, with the following restrictions:

- Submission Final Disposition is Accept and/or the Submission is "In Production"

- Publisher has appropriate RoleManager permissions controlling which Criteria and Action Links are displayed

Search Submission – Publisher Role

Publisher Roles can Save Searches with the following restrictions:

- Only able to view searches saved from their Publisher Role when logged in as Publisher

- Able to publish Searches as links on their own Publisher main menu

- Publisher Roles cannot Share their Saved Searches at all

- Editors cannot share their Saved Searches with Publisher Roles

Version 12.1

Beta begins next week!

Upgrades September/October

Password Security Improvements

Aries Systems will impose certain password security settings unless a publisher/publication signs a waiver to "opt out"

HIGH SECURITY:
- Password is always reset for password recovery (temporary password)
- Temporary password generated for password recovery expires after 4 hours
- %PASSWORD% merge field is link to password recovery function, except in letters where system generated password is sent for new/proxy registrations and password recovery
- System-generated password for new and proxy registrations expire after 5 days
- Password Encryption enabled – passwords displayed as asterisks throughout EM/PM

Most of these settings cannot be altered by users

Password Security Improvements

Aries Systems will impose certain password security settings unless a publisher/publication signs a waiver to "opt out"

LOW SECURITY:
- 'Reset Password Before Sending' setting is optional
- Temporary password generated for password recovery expiration is configurable
- %PASSWORD% merge field continues to send passwords in emails
- System-generated password for new and proxy registrations expire after 5 days – but can be changed or disabled
- Password Encryption is optional

Everything but Password Encryption is configurable by users

Password Security Improvements

'Reset Password Before Sending' setting is optional

Temporary password generated for password recovery expiration is configurable

System-generated password for new and proxy registrations expire after 5 days – but can be changed or disabled

Use the option below to reset the user's password to a temporary system-generated password before sending the E-mail for password recovery. This setting applies to both 'Send Username/Password' and 'Send Password Only'. The user will then be forced to set a new password the first time they log in using the temporary password.

☑ Reset password before sending

If the password is reset before sending, you may also configure an expiration policy. If the login attempt is pre-expiration, the user is required to change her password the first time she logs in successfully using the temporary password. If the login attempt is post-expiration, the user must initiate the password recovery function (click Send Username/Password or Send Password).

☑ Password generated for password recovery expires after [4] hours

Below you may configure the number of hours after which the system-generated temporary password will expire for new user registrations and proxy registrations. If the login attempt is pre-expiration, the user is required to change her password the first time she logs in successfully using the temporary password. If the login attempt is post-expiration, the user must initiate the password recovery function (click Send Username/Password or Send Password).

☑ Password generated for new user registrations and proxy registrations expires after [120] hours

CrossCheck Results for Authors

CrossCheck allows the upload of a manuscript to the iThenticate system where it is compared to a database of published papers

RoleManager permission allows Author access to the similarity report

CrossCheck Results link and associated Similarity Score is extended to the Author's *Submissions with a Decision* folder

Detailed People Notes

New People Notes feature – "Detailed People Notes" (existing People Notes field is still available)

- Each note identifies the user who entered the note, and the date and time of entry – 4000 character limit

- RoleManager permissions allows Editor to view, add and remove notes

- Notes are automatically saved; deleted notes cannot be restored

- Notes can be searched in Search People, Search Authors, and Search Reviewers

- Notes are available in Reports

Detailed People Notes

Detailed People Notes – Portal-Shared

Detailed People Notes can be made available across a "sharing group"

Each note identifies the user who entered the note, the date and time of entry, AND the publication on which the note was made

RoleManager permissions allows Editor to view, add and remove notes across publications

Detailed People Notes – Portal-Shared

Detailed People Notes are synchronized when sharing is established

Not all publications in the group have to share – it is a 2-way agreement

When sharing stops, all existing notes from other publications persist, but no new notes are propagated

Detailed People Notes – Portal-Shared

Shared Letters

Publishers with more than one publication using Editorial Manager or ProduXion Manager have to add or edit each letter template on each EM/PM site

- Standard wording required across all publications
- Change to signature, address, etc.
- New process that requires a new letter

It would be more convenient if letter templates could be added/edited in one place

Shared Letters

Master site can push letters to Subscriber sites

Master site controls:
- Body
- Subject
- Format (text/HTML)
- To/From
- Purpose
- Allow Attachments

Subscribers can edit:
- To/From
- Purpose
- Allow Attachments

All letters are initially set to "Hidden"

Shared Letters

Master site can add or remove subscriber sites

Shared Letters
Master site designates shared letters to push

Share Letter ▲▼	Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format		HTML Format		All Formats	
☐	Welcome1	General	○	Edit	⦿	Edit	Remove	Hide
☐	Welcome 2	General	○	Edit	○	Edit	Remove	Hide
☐	Appeal Reject Decision	Ad Hoc from Author	○	Edit	○	Edit	Remove	Hide
☐	Assign Production Task	Production	○	Edit	○	Edit	Remove	Hide
☐	Attachments to Author	Ad Hoc From Editor	○	Edit	○	Edit	Remove	Hide
☐	AU - Notice that Associate Editor was assigned	Invite/Assign/Unassign Editor	○	Edit	○	Edit	Remove	Hide
☐	Author - return submission	Communications to Author	○	Edit	○	Edit	Remove	Hide
☐	Author Approve Changes	General	○	Edit	○	Edit	Remove	Hide
☐	Author Corrections	Production	○	Edit	○	Edit	Remove	Hide
☐	Author Instructions and Due Date	General	○	Edit	○	Edit	Remove	Hide
☐	Author Invitation	Communications to Author	○	Edit	○	Edit	Remove	Hide
☐	Author Invitation for Commentary	Author Invitation	⦿	Edit	○	Edit	Remove	Hide
☐	Author Invitation for Proposal	Author Invitation	⦿	Edit	○	Edit	Remove	Hide

Hidden Letters								
Letter Purpose ▲ ▼		Letter Family Group by: ▲ ▼		Text Format		HTML Format		All Formats
Welcome letter to be hidden		General		⦿	Edit	○	Edit	Remove	Restore
None		General		○	Edit	⦿	Edit	Remove	Restore

[Add New Letter] [Save Changes] [Save Changes and Push Shared Letters] [Edit Image Files for HTML Letters]

Shared Letters

Subscriber site "un-hides" shared letters and can replace existing configured letters with shared letters

| Add New Letter | Save Changes | Edit Image Files for HTML Letters | Manage Letter Subscriptions | Replace Selected Letters with Shared Letters |

Replace with Shared Letter	Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format		HTML Format		All Formats
☐	Welcome 1	General	○	Edit	⦿	Edit	Remove
	Welcome 2 Ⓢ	General	○	Edit	⦿	Edit	Remove
☐	Appeal Reject Decision	Ad Hoc from Author	○	Edit	⦿	Edit	Remove
	Author Invitation Ⓢ	Communications to Author	○	Edit	⦿	Edit	Remove
	Author Invitation for Proposal II Ⓢ	Author Invitation	○	Edit	⦿	Edit	Remove
☐	Author Notice Editor Made Changes to Submission	Communications to Author	○	Edit	⦿	Edit	Remove
☐	Author Notice Journal Office Removes Submission	General	○	Edit	⦿	Edit	Remove
					⦿	Edit	Remove
					⦿	Edit	Remove

Letter Purpose	Letter Family	Replace with:
Welcome 1	General	Please Choose ▼
Appeal Reject Decision	Ad Hoc from Author	Please Choose ▼
Assign Production Task	Production	Please Choose ▼
Attachments to Author	Ad Hoc From Editor	Please Choose ▼
AU - Notice that Associate Editor was assigned	Invite/Assign/Unassign Editor	Please Choose ▼
Author - return submission	Communications to Author	Please Choose ▼
Author Approve Changes	General	Please Choose ▼
author corrections	Production	Please Choose ▼

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Links in PDF's

Submission Items can be configured to:

- Display in the PDF
- Display in PDF with a hyperlink to the file for download
- Not display in the PDF, but include a hyperlink (for file download or to a website)
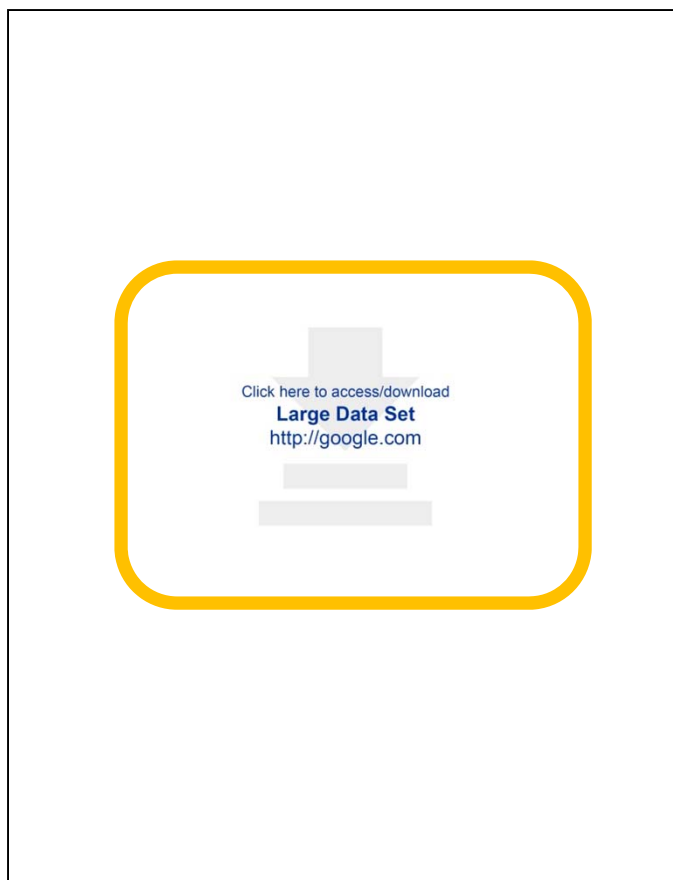
Links in PDF's

Submission Item: don't display in the PDF, but include a hyperlink (for file download or to a website)

Revision Number in PDF File Names

View Submission action link allows user to download PDF

When there are revisions, the action link will give the user an option to download the PDF of the initial submission, or any of the revised versions

PROBLEM – all files have the same file name

SOLUTION – files names will now contain revision number

Revision Number in PDF File Names
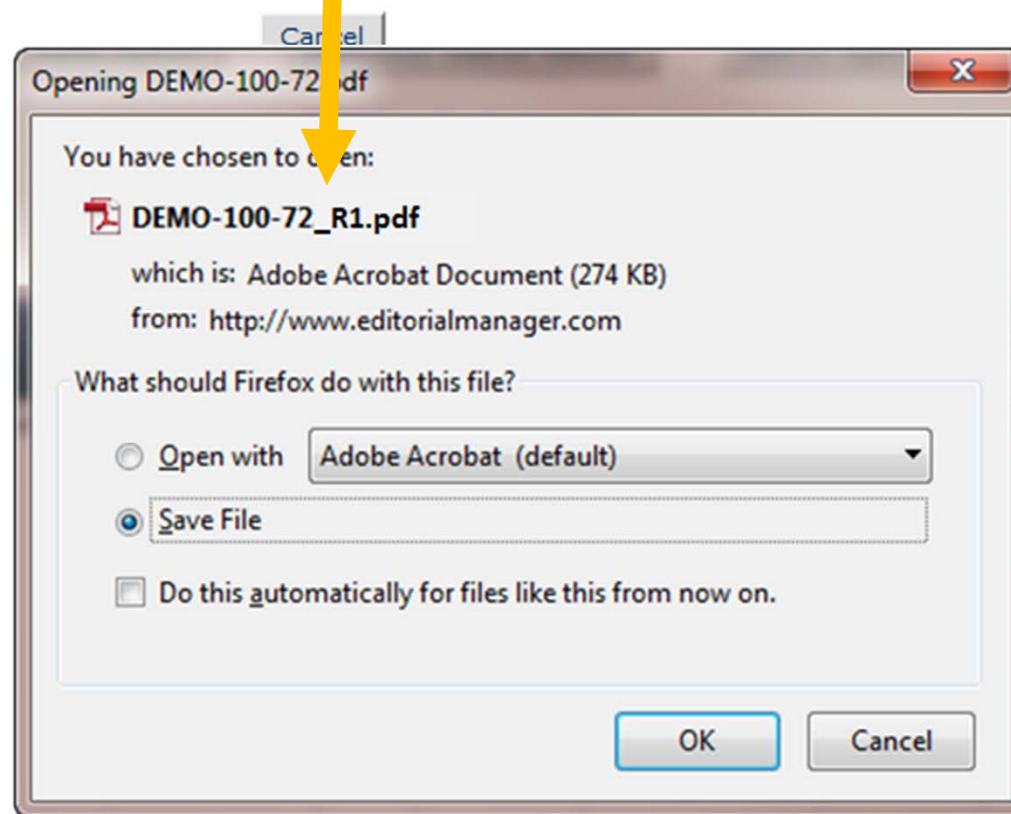
Create Editor Chain

Editors who process incoming submissions can build the Editor Chain in one step – no proxy or relying on editors

- The system builds the Editor Chain as if each editor was assigned individually by the previous Editor in the Chain

- The Editor Chain can be altered (add or remove Editors) and letters can be customized on the fly

- Editors can ignore the chain and revert to traditional methods

- Not for use with Suggest or Invite Editor (though last Editor in chain can be invited)
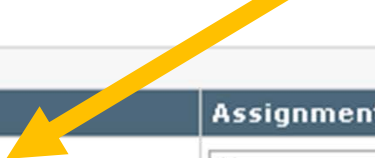
Create Editor Chain

Create Editor Chain

Create Editor Chain – Revisions

Create Editor Chain

Editor Chain Assignment Confirmation	The following Editors have been sequentially assigned to manuscript number Test_90-55_0013: Arnold Smith (Editor-in-Chief) Jack Edman (Section Editor) Jane D'itor (Flow 2 Associate Editor) The submission is now with Dr Jane Ed D'itor for handling. Assignment E-Mails were sent to the following Editors: Dr Jack Edman Dr Jane D'itor

Editor Chain Assignment Confirmation	The following Editors have been sequentially assigned to manuscript number Test_90-55_0013: Arnold Smith (Editor-in-Chief) Jack Edman (Section Editor) Jane Ed D'itor (Flow 2 Associate Editor) The submission is now with Dr Jane Ed D'itor for handling. No Assignment E-Mails were sent.

Create Editor Chain

Templates are created in PolicyManager

Templates are associated with Article Type in *Edit Article Type*

Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor Assignment Chain Template List   + Add Editor Assignment Chain Template

- Standard Three Editor Chain
- Two Editor Chain for Rapid Communications
- Three Editor Chain for Translations
- Three Editor Chain for Clinical Studies

+ Add Editor Assignment Chain Template

Create Editor Chain

Edit Editor Assignment Chain Template Details

Standard Three Editor Chain

Insert Special Character

Description* Standard Three Editor Chain

		Role	Assignment Letter
	🗑	Editor-in-Chief	None
	🗑	Associate Editor	None
	🗑	Associate Editor	Editor Assignment

Translation Editor | Add to Chain

Reviewer Numbering Options

Reviewer Numbers are assigned:

- When the Editor assigns the review, or...
- When the Reviewer agrees to do the review

If the Reviewer does not deliver:

- There is a missing Reviewer Number
- And a suspicious Author

SOLUTION: A new option allows publications to assign the Reviewer Number **when the review is submitted**

Publication-wide setting in PolicyManager, *Set Reviewer Preferences*

Merge Field – Agree to Review and Download PDF

New Merge Field allows Reviewer to agree to do the review assignment AND download the PDF for the current version of the submission

%ACCEPT_REVIEW_INVITATION_AND_VIEW_REVIEWER_PDF%

If Reviewer has already agreed – merge field will just download the PDF

Will NOT work if Reviewer has:
- Declined
- Been univited/unassigned/terminated
- Already submitted

Reviewer Numbering Options

Set Reviewer Preferences

Reviewer Due Date Calculation

Please choose the method for setting the default Reviewer Due Date and calculating Reviewer performance statistics. If you choose 'Invitation Mode', all Reviewer calculations (e.g. Days Until Review Due, Days Taken, Elapsed Days, Average Days Outstanding, etc.) are based on the date the Reviewer was invited to review the submission. If you choose 'Agreed Mode', all calculations are based on the date the Reviewer agreed to do the review.

○ Invitation Mode - Reviewer deadlines and statistics are calculated from the time the Reviewer is invited to review.

◉ Agreed Mode - Reviewer deadlines and statistics are calculated from the time the Reviewer agrees to do the review.

Reviewer Number Assignment

Please choose the point at which the system should generate the Reviewer Number used to refer to the identity of Reviewers in anonymous communications with Authors. Choose 'On Agreement/Assignment' to set it when the Reviewer first agrees to an Invitation to Review or is first Assigned. Choose 'On Submission of Completed Review' to set this when a Reviewer submits his first complete (not partial) review for a submission. If a Reviewer reviews any subsequent revisions of a submission, he retains the same Reviewer Number. Once assigned to a person, the Reviewer Number cannot be reassigned for use with any other person on that submission.

○ On Agreement/Assignment - The Reviewer Number is assigned when the Reviewer first agrees to review a submission (or is assigned).

◉ On Submission of Completed Review - The Reviewer Number is assigned when the Reviewer submits his first complete review for a submission.

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Reviewer Numbering Options

No affect on existing Reviewer Numbers

You are about to change the point at which Reviewer Numbers are assigned. A Reviewer's Reviewer Number for a submission will now be set when the Reviewer submits his first complete review for a submission.

WARNING: This will NOT affect any existing Reviewers who have already Agreed to review or been Assigned; their Reviewer Numbers have already been assigned and will not be removed or changed.

Cancel   OK

Reviewer Status Column Improvements

Editors appreciate access to useful information directly in key workflow folders without having to drill down or navigate away

SOLUTION: Add essential Reviewer data to key grids

- Reviewer Status column on some Editor pages

- Reviewers column on the *Search Submissions – Search Results* page

Reviewer Status Column Improvements

Reviewer Status Column Improvements

Review Status

3 Complete
Betsy Boxx Ross - Really Long Recommen...
John Chadwick - Accept
Jack Bauer - Revise
4 Total Required

2 Partial Review Saved
Richard Has A Really Long...
Late: 3 days overdue
Wesley Rob Roberts
Due: Jul 20 2014 4:45 PM

2 Agreed
Ricky Rack Racoon
Late: 3 days overdue
John E Ross
Due: Jul 28 2014 2:05 PM

2 Invited - No Response
Merry O'Toole
Invited 34 days ago
Rick Ranger
(Suggested)
Invited 20 days ago

2 Declined
Charlie Hansen - Try my colleague Joe Smith. He is better suited to review this paper and can be reached at jsmith@harvard.edu.
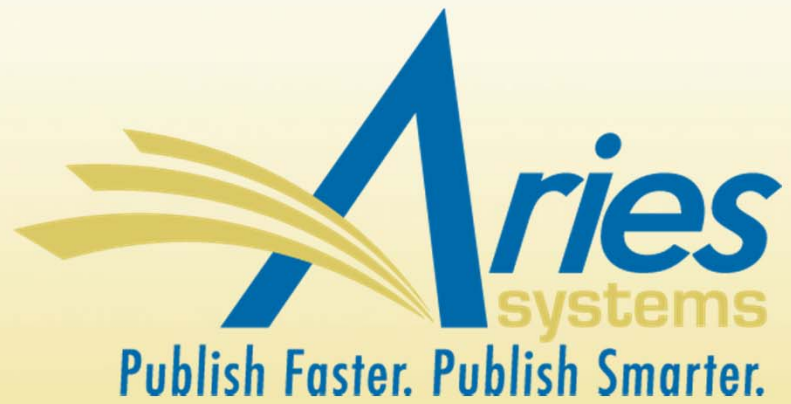Susie Haddick

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THANK YOU!

Tony Alves

Director, Product Management

talves@ariessys.com

Product Management

Tony Alves

Director, Product Management

SHAPES

Submission Items can be configured to:

- Display
- Display
- Not display