Welcome to EMUG 2015

Coming Soon! Versions 12.2 & 13.0

Tony Alves, Director of Product Management

bit.ly/EMUG15-RoadAhead

em Editorial Manager®
www.editorialmanager.com

Aries systems
Publish Faster. Publish Smarter.

Version 12.2

With Engineering

Beta scheduled to begin October/November

Upgrades February/March 2016

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: ■

Insert Special Character

Flag Name: Subscan Start ×

Maximum 256 characters

Flag Type ☑ Editorial
☑ Production

Associate with AMD Field None ▾

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

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

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

Flag History

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
X	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

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Setting Final Disposition to "Withdrawn" is a manual process often forgotten.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".

PolicyManager setting to configure number of days after which a submission is automatically "Withdrawn".

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 14 days after the Author declines to revise

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 name 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

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

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. (more...)

Back to PolicyManager

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

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Text Format		HTML Format		All Formats
Editor Agrees to Handle Assignment	General	Section Ed – Editor Agree to Assignment	⦿	Edit	○	Edit	Remove | Hide
Editor Assignment	Invite/Assign/Unassign Editor	Associate Editor – Editor Assigned (Not Invited) Editor-in-Chief – Editor Assigned (Not Invited)	⦿	Edit	○	Edit	Remove | Hide
Editor Assignment Undone	Invite/Assign/Unassign Editor	Associate Editor – Editor Unassigned Section Editor – Editor Unassigned	⦿	Edit	○	Edit	Remove | Hide
Editor Decision - Accept	Decision		⦿	Edit	○	Edit	Remove | Hide
Editor - Notice of Withdrawn submission	General	Associate Editor – Final Disposition - Withdrawn Editor-in-Chief – Final Disposition - Withdrawn Journal Office – Final Disposition - Withdrawn Section Ed – Final Disposition - Withdrawn	⦿	Edit	○	Edit	Remove | Hide
Editor Initiate Author Rebuttal	General	Editor-in-Chief – Initiate Rebuttal Journal Office – Initiate Rebuttal	⦿	Edit	○	Edit	Remove | Hide

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.
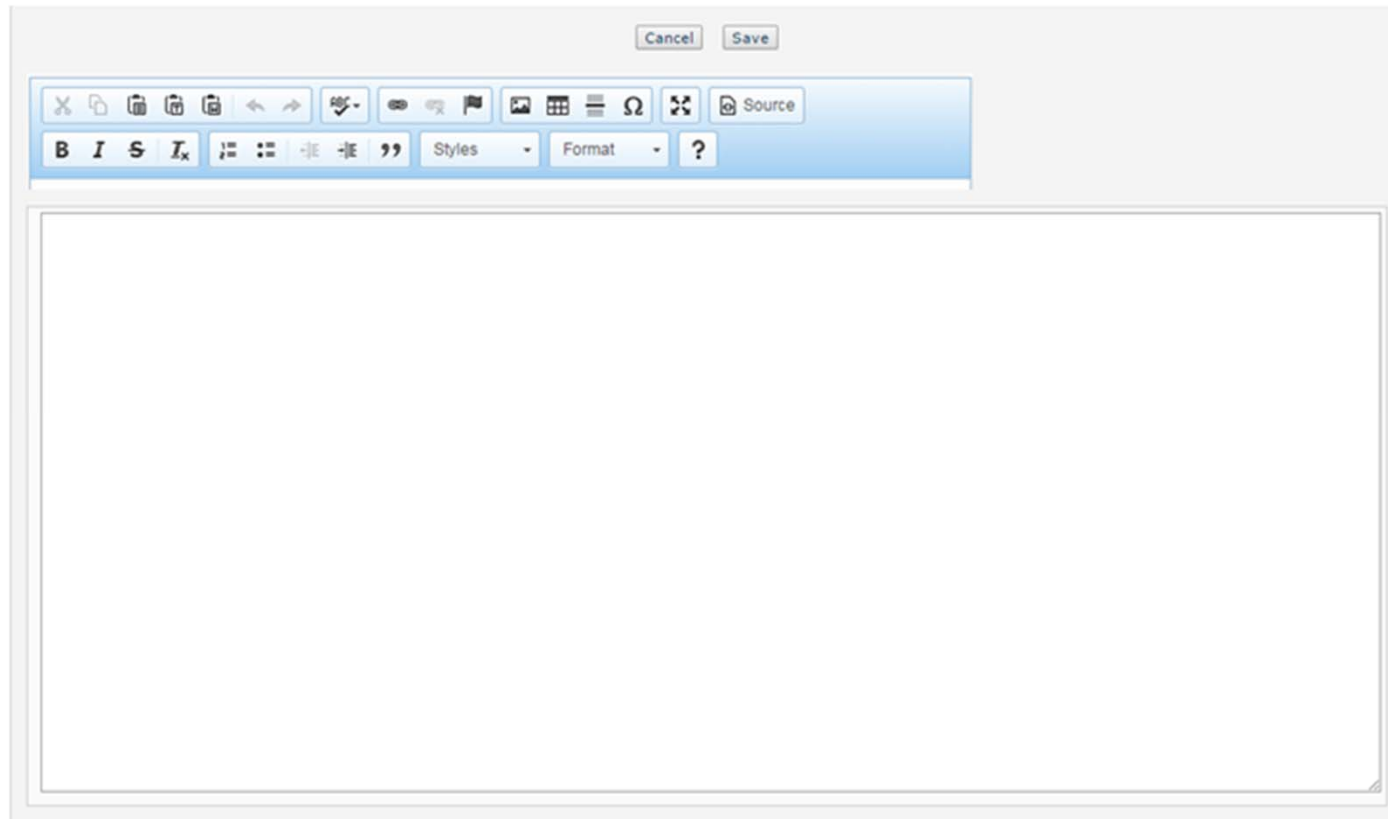
Letter Improvements

Customize Letter - Ad hoc letter from editor to author

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Cancel   Preview and Send

From: "Ed Editor" <cwebber@ariessc.com>

To: Corresponding Editor;

Multiple addresses may be entered, separated by a semicolon

Letter Subject: Sending Inquiry to Author

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

cc:

Attachments: Add/Change Attachments

Letter Body:

B I S I_x   Styles   Format   ?   Open in New Window

```
# here is some comment text

Dear %GREETING%,
Here are some merge fields:
•       %AUTHOR_QUESTIONNAIRE% - This merge field includes any question presented to the Corresponding Author on the 'Additional Information' step of
the Submission process.  These questions may be Submission Questions or Author Questions.
•       %OTHERAUTH_VERIFY_DEEP_LINK% - when Co-Author Questionnaires are being used, expiration depends on the level of verification configured for the
Article Type:
o       Verify only -the deep link expires after the Co-Author clicks on the [Submit to Publication] button on the Contributing Authorship Questionnaire
page.
o       Register and Verify - the deep link expires after the Co-Author successfully logs in to the system from the login page presented after clicking
on the deep link AND submits the questionnaire.
•       %OTHERAUTH_DECLINE_DEEP_LINK% - the decline deep link expires after it is clicked.
o       NOTE:  If a Co-Author clicks the deep link generated by the %OTHERAUTH_DECLINE_DEEP_LINK% merge field, and has previously saved responses to a
Questionnaire, any saved responses are deleted.
```

Cancel   Preview and Send

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*

What grids would you like to see enhanced NEXT?!

Power Grid Expansion

Grid configuration will be saved the 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

Editor Substitution

Switch an Editor anywhere in the chain at anytime

- Currently – only the lowest level Editor can be unassigned or switched

- 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
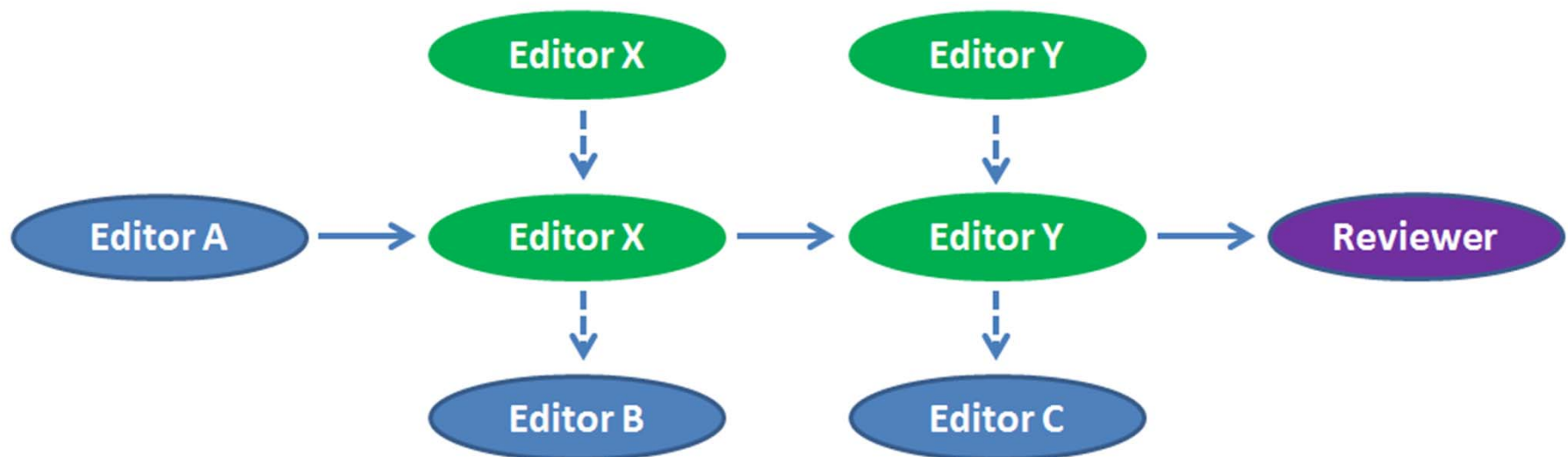
Editor Substitution

Switch an Editor anywhere in the chain at anytime

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
🗑	Editor 1	Sally Editor Managing Editor	Managing Editor ▾	None Selected ▾
🗑	Editor 2	David Editor Section Editor	Section Editor ▾	None Selected ▾
🗑	Editor 3	Michael Editor Associate Editor	Associate Editor ▾	Editor Search

Editor Substitution

Switch an Editor anywhere in the chain at anytime

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	Sally Editor Managing Editor	Managing Editor	None Selected ▾
🗑	Editor 2	David Editor Section Editor	Section Editor	None Selected ▾
🗑 ⚠	Editor 3	Michael Editor Associate Editor	Associate Editor	Editor Search
🗑	Cannot Assign a person twice enley Associate Editor		Associate Editor ▾	Michael Editor ▾

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	Sally Editor Managing Editor	Guest Editor ▾	John Lennon ▾
🗑	Cannot Assign On	David Editor Section Editor	Section Editor ▾	Jackson Browne ▾
🗑	Editor 3	Michael Editor Associate Editor	Associate Editor ▾	Editor Search

Modify Editor Chain

View Reviews and Comments

Manuscript Number:
SALLYDEV120-D-15-00015

Title: Testing Editor
Assignment Chain

The current Editor Assignment

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
🗑 ⚠	Editor 1	Sally Editor Managing Editor	Guest Editor ▾	John Lennon ▾
	Cannot Submit a Decision id Editor Section Editor (Major Revision)	Section Editor	None Selected ▾
	Editor 3	Michael Editor Associate Editor (Minor Revision)	Associate Editor	Editor Search

Proxy Register Changes

Tightened controls and unique 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 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

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

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   `Reviewer Consultation ▾`

Discussion Topic Template Name	Find Qualified Reviewers
'Initiate Discussion' Page Custom Instructions	
Topic	Suggestions for Good Reviewers
	☑ Allow user to modify Topic name when init
Initial Comments	This discussion allows all Edito to a submission to discuss it ov submission. ☐ Allow user to modify Initial Comments whe
Default Editor Participant Permissions	☑ View Reviews and Comments ☐ Download Files (source and companion) ☐ View Draft Decision Letter
Editor Access to 'Details' Link	☑ Display 'Details' link in Submissions with A page. Select the Details Page Layout that participant chain and do not have RoleManager permissio Manuscripts.' Editorial Kitchen Sink

Editor Discussion Letters	Select the Letter to send asking Editors to par
	`Editor - You have been added to a discussion ▾`
	Select the notification letter to send to Editors
	`Editor - New Comment Posted to Discussion ▾`
	○ Notify discussion initiator only
	◉ Notify all active Editor participants

Reviewer Discussion Letters	Select the Letter to send asking Reviewers to participate:
	`Reviewer - You have been added to a discussion ▾`
	Select the notification letter to send to Reviewers when comments are posted:
	`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	
1	Editor Consultation	Default Topic Template	Remove	Edit
2	Editor Consultation	Decision Letter Review	Remove	Edit
3	Editor Consultation	Master Topic Template	Edit	(Master)
4	Reviewer Consultation	Editors and Reviewers - Auto Initiate	Remove	Edit

`Update Order`

	Editor Consultation	Reviewer Criteria (Hidden)	Remove	Edit

`Add`

Reviewer Discussion Forum

Topic: Reviewers du Jour

Comments:

Participant ▲▼	Comments	Date ▲▼
Mary Jones, PhD	Hey, I am Mary Jones and I'm testing what happens when a discussion is (more...)	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] [Post]

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

[View/Print All]

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

Version 13.0

Specification are being written

Beta scheduled to begin March/April 2016

Upgrades July/August 2016

Version 13.0 – Planned Enhancements

Submit Manuscript
- CRediT selection
- Limit file types at submission
- Warning if Author list changed at Revision

PDF Enhancements
- Watermarks on PDFs
- Login to download PDF files
- Select Editor/Author PDF and/or Reviewer PDF for download, attaching, etc.

APC API Expansion and Additions
- Trigger Payments (APC, etc.) from a Production Task
- Custom Questions included in APC API

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:

CRediT
An open standard for expressing roles intrinsic to research

Authorship and Attribution

Authorship and Attribution

Configure Contributor Roles

Contributor Roles can be attributed to each Author of a submission. On this page, you may choose your version of the taxonomy, specify the metadata to be collected, and define the custom instructions to be displayed to users when attributing roles. Then on the *Set Other Author Parameters* page, you can specify whether to collect Contributor Roles for your publication (along with the other parameters for Authors). Then on the *Edit Article Type* 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://credit.casrai.org

Set Taxonomy Version

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

Choose Taxonomy: [None ▾] View Taxonomy

Select Additional Metadata to be Collected

The following options allow you to specify whether to collect a Degree of Contribution for each Contributor R[...] assigned to an Author, and whether to display a text box to allow the Corresponding Author to enter a name[...] 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 while editing th[...] Contributor Roles for an Author.

Area	Instructions
Contributor Roles Instructions	Insert Special Character
	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 http://credit.casrai.org for more information. You may select one or more Contributor Roles for each Author of a submission.

View Default Instructions   Revert to Default Instructions

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...)

[Cancel]   [Submit]

Other Author Parameters		**Include in Merge Field?**
Set "Title" Text Entry Box Preference:	Hidden ▾	☐
Given/First Name	Required	☑

Part of page omitted

Set "Country" Text Entry Box Preference:	Required ▾	☑
Set "Contributor Roles" Preference:	Hidden ▾	☐
	Display	
	Hidden	
Set "Deceased Status" Text Entry Box Preference:		☑
Set "Equal Contribution Status" Text Entry Box Preference:	Display ▾	☑
Set "Post-Publication Corresponding Author" Text Entry Box Preference:	Display ▾	☑

Aries systems
Publish Faster. Publish Smarter.

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 only 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

Insert Special Character

Item Type: [   ]

Maximum 256 characters

Item Type Family: [Default ▾]

PDF Handling: [Create Link for Image Files only (TIF, GIF, JPEG, JPG, PICT, BMP, PSD, WPG, PNG) ▾]

Part of page omitted

In addition to the system limitations for the types of files that can be built into a PDF, your publication may further restrict the types of files that Authors can associate with this submission item type on the *Attach Files* page for both New and Revised submissions. For example, you can specify that PDF files cannot be associated with this submission item type.

☑ Restrict file types allowed for this submission item type

New Submission	**Revised Submission**
● Allow all file types except (exclusive list):	● Allow all file types except (exclusive list):
Archive (ZIP GZ TGZ TAR) Compiled LaTeX File (DVI Excel 2007 (XLSB XLSM XLSX) Excel 97-2003 (XLS) General Image (JPG JPEG FIG BMP PSD PNG) MacDraw (PCT PICT) Open Office Excel (ODS)	Archive (ZIP GZ TGZ TAR) Compiled LaTeX File (DVI Excel 2007 (XLSB XLSM XLSX) Excel 97-2003 (XLS) General Image (JPG JPEG FIG BMP PSD PNG) MacDraw (PCT PICT) Open Office Excel (ODS)
○ Allow only these file types (inclusive list):	○ Allow only these file types (inclusive list):
Archive (ZIP GZ TGZ TAR) Compiled LaTeX File (DVI Excel 2007 (XLSB XLSM XLSX) Excel 97-2003 (XLS) General Image (JPG JPEG FIG BMP PSD PNG) MacDraw (PCT PICT) Open Office Excel (ODS)	Archive (ZIP GZ TGZ TAR) Compiled LaTeX File (DVI Excel 2007 (XLSB XLSM XLSX) Excel 97-2003 (XLS) General Image (JPG JPEG FIG BMP PSD PNG) MacDraw (PCT PICT) Open Office Excel (ODS)

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!

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

Watermarks and Branding on PDFs

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

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.

This can even be required when the Editor rebuilds the PDF.

Access to Author/Editor & Reviewer PDF

Access to Author/Editor & Reviewer PDF

Version 13.0 – Planned Enhancements

Editor Workflow and Convenience
- Power Grid continued roll out
- Login as newly-proxied user
- Status change when "Required Reviewers" count altered

Invited Author Improvements
- Upload Excel file of Author list to launch invite process
- Automated Reminders for Invited Authors

QC Tools for Data and Images
- ORCID Authenticate Deeplink
- Crystallography QA tool

Version 13.0 – Planned Enhancements

Power Grid continued roll out

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].

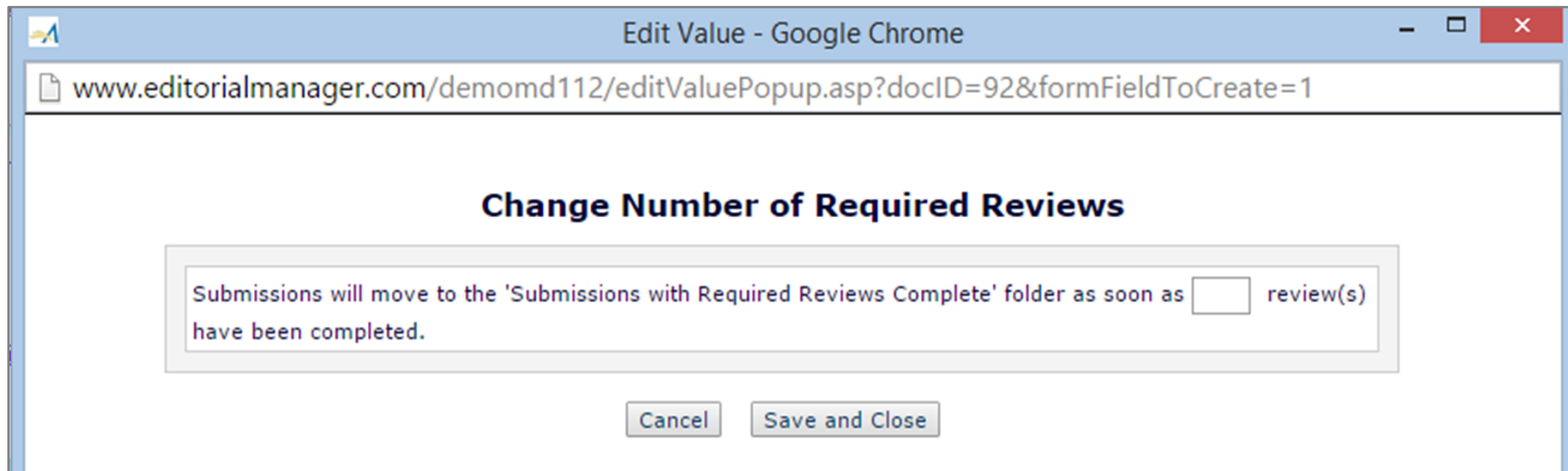Proxy as: [Author] [Reviewer]

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 Status when Changing Required Reviewers Count

Reviewer Assigned

Event	New Document Status	Warnings	Alternative Text for Authors
Request Unregistered Reviewer	No Change		
Reviewer Invited			
Reviewer Assigned (Not Invited)			
Reviewer Agree			
Reviewer Decline			
Review Due Date Change			
Un-invite Reviewers Before Agreeing to Review			
Un-assign Reviewers After Agreeing to Review			
Promote Alternate Reviewers	Under Review ▼		
Re-open Review	No Change		
Review Assignment Completed	No Change		
Required Reviews Complete	Required Reviews Completed ▼		
Required Reviews Reset	Under Review ▼		

STATUS HISTORY

Status Date	Document Status	Status Days	Role Family	Revision	Operator
Apr 16 2015 1:23:45:401PM	Under Review	----	EDITOR	0	Michael Di Natale, M.D.
Apr 16 2015 12:22:46:466PM	Decision in Process	----	EDITOR	0	Michael Di Natale, M.D.
Apr 16 2015 11:32:46:466AM	Required Reviews Completed	----	EDITOR	0	Cassie Berman
Apr 16 2015 10:22:46:466AM	Under Review	----	EDITOR	0	Michael Di Natale, M.D.
Apr 16 2015 9:12:46:567AM	Required Reviews Completed	----	EDITOR	0	Rex Manning, DDS
Apr 15 2015 1:46:567PM	Under Review	1	EDITOR	0	Michael Di Natale, M.D.
Apr 6 2015 4:22:46:567PM	With Editor	----	EDITOR	0	Michael Di Natale, M.D.
Mar 3 2015 2:11:03:260PM	Editor Invited	34	EDITOR	0	Michael Di Natale, M.D.
Oct 1 2014 8:13:07:450PM	Manuscript Submitted	153	EDITOR	0	Joe Reaves
Oct 1 2014 8:08:36:1?0PM	Needs Approval	----	AUTHOR	0	Joe Reaves
Oct 1 2014 8:08:?:?7PM	Building PDF	----	AUTHOR	0	Joe Reaves
Oct 1 2014 8:07:5?470PM	Incomplete	----	AUTHOR	0	Joe Reaves

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	Editor Notice: Required Reviews Complete	Michael Di Natale, M.D.	Required Reviews Completed	0	Michael Di Natale, M.D.
Apr 15 2015 1:46:567PM	Reviewer Agree Notificiation	Michael Di Natale, M.D.	Under Review	0	Joe REaves
Apr 15 2015 1:46:567PM	Reviewer Invitation	Joe Reaves	Under Review	0	Michael Di Natale, M.D.
Mar 10 2015 1:33:20:690AM	Editor Invitation	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 ▼
Required Reviews Reset	Editor Notice More Reviews Needed ▼

Upload Excel File for Author List 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 Excel File for Author List to Launch Invitation Process

Author Selection Summary - Manuscript JANETDEV121-D-15-00011
LWW Books - Test 1

Manuscript Details

Author Search

Search My Publication | Search for Authors ▼ | Go

Select from File

Click here to pull the set of potential Authors from an Excel file that lists people by First Name, Last Name, Email Address, and optionally, a description of the material they will be asked to author. If a person is not a registered EM user and you invite him or her, he or she will be proxy-registered.

Selected Authors

Invited Authors

There are no Authors Invited for this submission

Alternate Authors

There are currently no Alternate Authors selected for this submission

Upload Excel File for Author List to Launch Invitation Process

Select a File

To upload a file of people to invite as Authors for a proposal, you can either click the 'Choose File' button to browse your computer, or drag and drop a file onto the folder image below.

Caution: It must be an Excel file that contains the following information in a separate row for each person you wish to invite:

- First Name
- Last Name
- Email Address
- Component (optional)

The system will attempt to match up each person with a registered user in the system. If the person is not registered, and you invite the person to the proposal, the system will proxy-register the person before sending them the invitation.

Browse your computer:

Choose File

Or drag and drop a file here:

Upload Excel File for Author List to Launch Invitation Process

Author Candidates

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

Page: 1 of 1 (3 total Authors)   Display 10 ▼ results per page.

Select All / Clear All

Select	Number of Invitation Letters	Author Name	Board Member	Submissions Being Processed		Author Statistics		Invitatio
				Invited	Unsolicited			
☑	3	**Confirmed EM Match:** Abe J. Abelard ▽ **Information from File:** Abe Abelard aabelard@abelard.com Component: The Basics Component: Delving Deeper	No			Agreed and Awaiting Submission: Invited Submissions Received: Un-invited Before Agreeing: Un-invited After Agreeing: Last Invited Submission Agreed: Last Invited Submission Received: Last Invited Submission Declined: Avg Days to Submit:	- - -	Date Last Outstand Agreed: Declined: Un-invite Total Inv
☑	1	**No Match:** **Information from File:** Buzz Aldrin buzzy@nasa.gov Component: Beyond the Basics						
☑	1	**Confirmed EM Match:** Maney M. Alexander, xyz PhD ▽ 👑 🚩 ☺ # ♣ ☀ **Information from File:** Maney Alexander maney_alexander@bc.edu Component: Higher and Drier Author Invited - Dec 8 2014 2:19PM Author Invited - Dec 8 2014 2:19PM	No	0	170	Agreed and Awaiting Submission: Invited Submissions Received: Un-invited Before Agreeing: Un-invited After Agreeing: Last Invited Submission Agreed: Last Invited Submission Received: Last Invited Submission Declined: Avg Days to Submit:	0 0 9 1 Apr 18 2013 11:46AM - - 0	Date Last Outstand Agreed: Declined: Un-invite Total Inv

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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.

Reminder Type:

○ **Outstanding Invitations:** Send an automated reminder e-mail to Authors who were invited to submit for a Proposal or for a Commentary on another submission exactly `10` days ago. If Authors have already agreed to or declined the invitation, they will not receive a reminder.

○ **Reminder Before Invitation Response Due Date:** Send an automated reminder e-mail for invitations that are exactly `7` days before their Invitation Response Due Date. Reminders will be sent to Authors who have not agreed to or declined their invitation yet.

○ **Reminder Past Invitation Response Due Date:** Send an automated reminder e-mail for invitations that are exactly `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.

○ **Outstanding Submissions:** Send an automated reminder e-mail to Authors who agreed to submit for a Proposal or for a Commentary on another submission exactly `10` days ago. If Authors have already submitted their manuscript, they will not receive a reminder.

○ **Reminder Before Submission Due Date:** Send an automated reminder e-mail for invited submissions that are exactly `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.

○ **Reminder Past Submission Due Date:** Send an automated reminder e-mail for invited submissions that are exactly `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.

Invitation Type:	Invitations to Respond to a Proposal ▼
Handling Editor:	(All Editors) ▼
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.

Proposal Article Type:	Proposal for Editorial Proposal for Perspective	Clear All Select All
Submission Article Type:	Editorial Perspective Correspondence Reply to Correspondence	Clear All Select All
Section/Category:	Main Section Letters to the Editor Test Section Hidden Section (hidden)	Clear All Select All

Save as Automated Reminder

ORCiD 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:

A new deeplink will allow users to check that their ORCiD is authenticated, and allow them to get an authenticated ORCiD 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"

Crystallography file QA tool "checkCIF"

Crystallography file QA tool "checkCIF"

Crystallography file QA tool "checkCIF"

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

Items associated with the current revision of the Submission, and configured to be sent to the checkCIF tool, are listed below. Click the 'Completed' link to see a PDF of the results.

Items that have not yet been sent to the tool are marked as 'Not yet tested'. Items that are currently being tested are marked as 'In Progress'. If an Item has errored out, the error message can be seen by clicking the checkCIF error hyperlink.

Close   Re-Send Files to checkCIF

Submission Files

Item Type	Item Description	File Name	Size	Date Tested	Actions	checkCIF Results
Crystallograophic File	structure1	structure1.cif	16.8 KB	Jun 21, 2015	Download	checkCIF Error
Crystallograophic File	structure2	structure2.cif	20.3 KB	Jun 21, 2015	Download	Testing in progress
Crystallograophic File	structure3	structure3.cif	20.5 KB	Jun 21, 2015	Download	Not yet tested
Crystallograophic File	ministructure1	ministructure1.cif	138.5 KB	Jun 21, 2015	Download	Completed

Companion Files (not built into the PDF)

Item Type	Item Description	File Name	Size	Date Tested	Actions	checkCIF Results
Crystallograophic File	structure4	structure4.cif	18.2 KMB	Jun 21, 2015	Download	checkCIF Error
Crystallograophic File	structure5	structure5.cif	26.5 KB	Jun 21, 2015	Download	Completed

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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 the event that will trigger a Payment Request for Publication Charges.

If 'None' is selected, a Submission Production Task must be configured to trigger the 'Payment Due' call. If an Editorial event is selected to trigger the initial call, subsequent Payment Due calls may be triggered as Submission Production Tasks. The task may be assigned manually or automatically.

The instructions to Authors that is displayed on the optional and required 'Publication Charges' pages may be customized.

Either 'Optional' or 'Required' must be selected in the 'Apply Publication Charges' dropdown menu on the 'Edit Article Type' page in order for the Author to see either the optional or required 'Publication Charges' page.

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)

Prevent Submission if the Author does not view the Publication Charges

Select this checkbox to prevent Authors from submitting a manuscript if the Payment System is unavailable or the Author does not view the Publication Charges. Authors will be able to continue editing the submission, but will not be able to submit the manuscript to the Editorial Office.

☐ Prevent submission if the Payment System is unavailable

Customize Publication Charges Instructions for the Author

Area	Instructions

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'
   ☐ Do not trigger if APC Status is already 'In Process' or 'Complete'
   ☐ Do not trigger on Repeated Assignment of this Task
Letter Options:
   ○ Trigger all ActionManager 'Publication Charges Payment Requested' letters
   ○ Send [Please Choose a Letter ▾] letter to the Corresponding Author only

Trigger APC API – Payment Due in Production Tracking

APC API Can Include Data from Custom Questions

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 is enhanced to include the data collected in the Submission Questionnaire feature, which is part of the manuscript submission process. 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

THANK YOU!

Tony Alves

Director, Product Management

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Product Management

Tony Alves

Director, Product Management

SHAPES

Submission Items can be configured to:

- Display
- Display
- Not display