

Welcome to EMUG 2015

Coming Soon! Versions 12.2 & 13.0

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bit.ly/EMUG15-RoadAhead



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: 

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

Flag Type
 Editorial
 Production

Associate with AMD Field



- Display in History** When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.
- Hide** When you hide a flag, the flag cannot be turned on for new submissions, but will continue to display on existing submissions (until it is turned off by a user with appropriate permission).
- Turn off flag throughout the system** When you turn off a flag throughout the system, the flag will be removed from all submissions to which it was attached.



Flag History

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

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Setting Final Disposition to “Withdrawn” is a manual process often forgotten.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 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	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Editor Assignment	Invite/Assign/Unassign Editor	Associate Editor – Editor Assigned (Not Invited) Editor-in-Chief – Editor Assigned (Not Invited)	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Editor Assignment Undone	Invite/Assign/Unassign Editor	Associate Editor – Editor Unassigned Section Editor – Editor Unassigned	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Editor Decision - Accept	Decision		<input checked="" type="radio"/> Edit	<input type="radio"/> 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	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Editor Initiate Author Rebuttal	General	Editor-in-Chief – Initiate Rebuttal Journal Office – Initiate Rebuttal	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

Letter Improvements

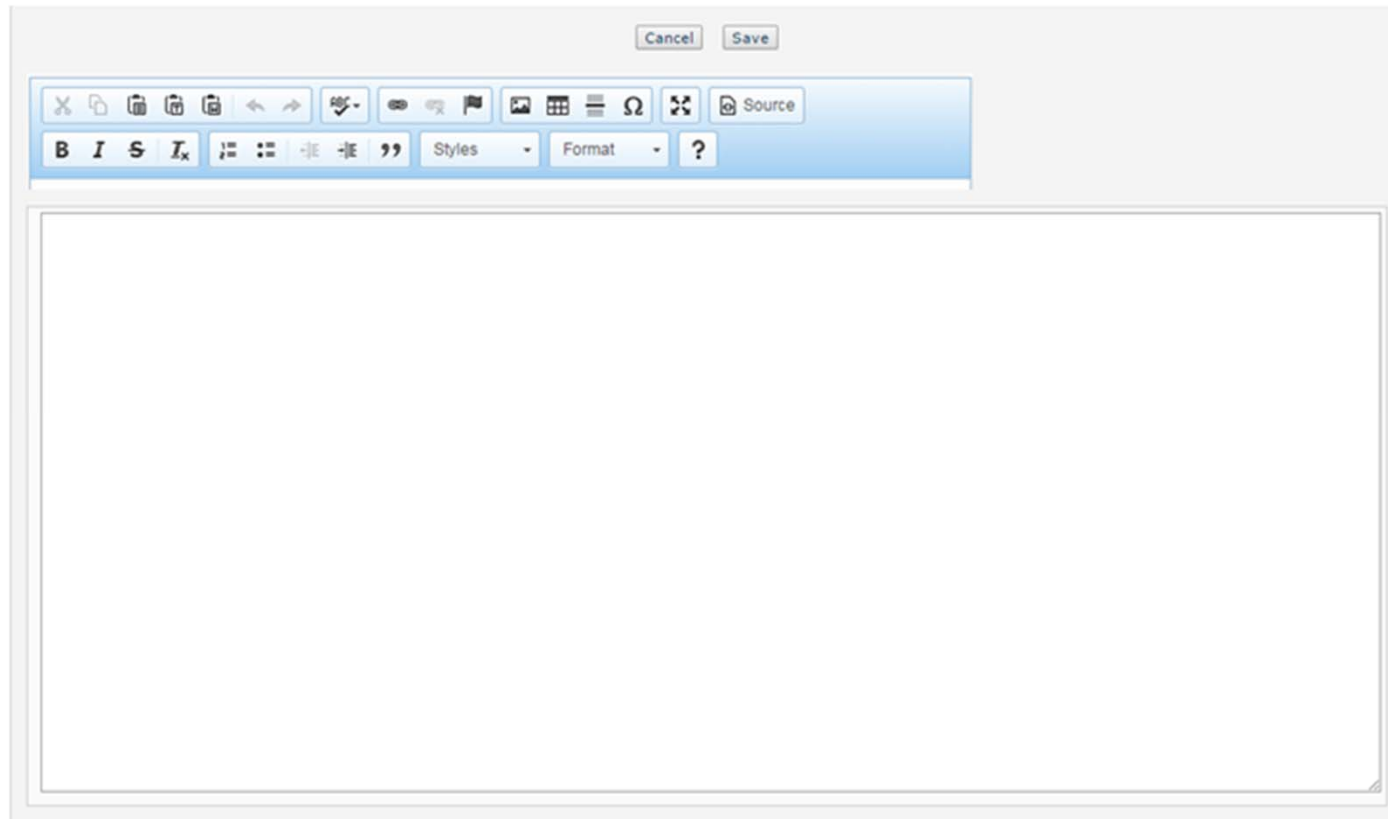
Email correspondence is a major element of EM/PM and sending compelling and visually appealing letters can assist in getting attention and increasing compliance.

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.

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

To: Corresponding Editor;

Multiple addresses may be entered, separated by a semicolon

Letter Subject:

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:

Letter Body:

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, bulleted list, numbered list, link, unlink, text color, background color, indent, outdent, source code, and a help icon.

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.

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

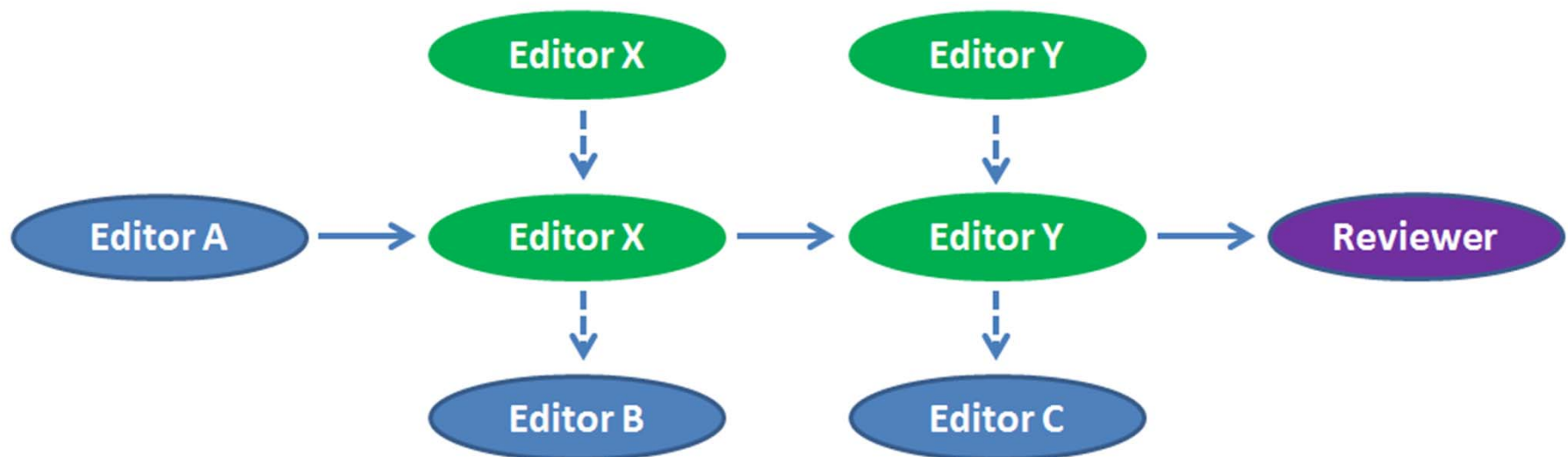
Editor Substitution

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 <input type="text"/>	None Selected <input type="text"/>
	Editor 2	David Editor Section Editor	Section Editor <input type="text"/>	None Selected <input type="text"/>
	Editor 3	Michael Editor Associate Editor	Associate Editor <input type="text"/>	Editor Search

Editor Substitution

Switch an Editor anywhere in the chain at anytime

Editor Being Unassigned

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

Others Notified of Editor Unassignment

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

Editor Being Assigned (Switched To)

Name	Letter		Do Not Send Letter
David Editor (Section Editor)	Editor Assignment ▾	Customize	<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	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

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

Current Editor Assignment Chain

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

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

Register and Select New Reviewer

Please enter key information about the person you are registering as a Reviewer.

[Insert Special Character](#)

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.](#)

Given/First Name *

Family/Last Name *

[Insert Special Character](#)

Required Information

Reviewer Role * ▼

Default Login Role: Reviewer

Country * ▼

+ Additional (Optional) Information

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

Configure Automatic Discussion Initiation

In the grid below, for each Article Type, you may specify the types of discussions to be initiated automatically for a submission based on a Discussion Trigger. (more...)

Cancel Submit

Discussion Trigger	Editor Agrees to Assignment	First Editor Confirmed
Article Type		
Original Study	<input type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: Select All Clear All Associate Editor Editor-In-Chief Everything Editor Guest Editor Editor Consultation Topic Templates: Please Choose a Topic Template	<input type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: Please Choose a Topic Template
Special Issue	<input type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: Select All Clear All Associate Editor Editor-In-Chief Everything Editor Guest Editor Editor Consultation Topic Templates: Please Choose a Topic Template	<input type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: Please Choose a Topic Template
Rapid Communication	<input type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: Select All Clear All Associate Editor Editor-In-Chief Everything Editor Guest Editor Editor Consultation Topic Templates: Please Choose a Topic Template	<input type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: Please Choose a Topic Template

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.

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

[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 (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](#)

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

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:



Authorship and Attribution

Enter Author Details Open Special Character Palette

Given/First Name*
Middle Name

Family/Last Name*
Academic Degree(s)

Affiliation

E-mail Address*
ORCID [Fetch](#)
[What is ORCID?](#)

Institution

Department

City

State

Zip or Postal Code

Country*

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 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 Role 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 the Contributor Roles for an Author.

Area	Instructions
Contributor Roles Instructions	<p>Insert Special Character</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 http://credit.casrai.org for more information.</p> <p>You may select one or more Contributor Roles for each Author of a submission.</p> <p>View Default Instructions Revert to Default Instructions</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: Hidden

Given/First Name Required

Part of page omitted

Set "Country" Text Entry Box Preference: Required

Set "Contributor Roles" Preference: Hidden

Set "Deceased Status" Text Entry Box Preference: Display

Set "Equal Contribution Status" Text Entry Box Preference: Display

Set "Post-Publication Corresponding Author" Text Entry Box Preference: Display

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: ▼

PDF Handling: ▼

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
<p><input checked="" type="radio"/> Allow all file types except (exclusive list):</p> <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"><p>Archive (ZIP GZ TGZ TAR) ▲</p><p>Compiled LaTeX File (DVI) ☰</p><p>Excel 2007 (XLSB XLSM XLSX)</p><p>Excel 97-2003 (XLS)</p><p>General Image (JPG JPEG FIG BMP PSD PNG)</p><p>MacDraw (PCT PICT)</p><p>Open Office Excel (ODS) ▼</p></div>	<p><input checked="" type="radio"/> Allow all file types except (exclusive list):</p> <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"><p>Archive (ZIP GZ TGZ TAR) ▲</p><p>Compiled LaTeX File (DVI) ☰</p><p>Excel 2007 (XLSB XLSM XLSX)</p><p>Excel 97-2003 (XLS)</p><p>General Image (JPG JPEG FIG BMP PSD PNG)</p><p>MacDraw (PCT PICT)</p><p>Open Office Excel (ODS) ▼</p></div>
<p><input type="radio"/> Allow only these file types (inclusive list):</p> <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"><p>Archive (ZIP GZ TGZ TAR) ▲</p><p>Compiled LaTeX File (DVI) ☰</p><p>Excel 2007 (XLSB XLSM XLSX)</p><p>Excel 97-2003 (XLS)</p><p>General Image (JPG JPEG FIG BMP PSD PNG)</p><p>MacDraw (PCT PICT)</p><p>Open Office Excel (ODS) ▼</p></div>	<p><input type="radio"/> Allow only these file types (inclusive list):</p> <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"><p>Archive (ZIP GZ TGZ TAR) ▲</p><p>Compiled LaTeX File (DVI) ☰</p><p>Excel 2007 (XLSB XLSM XLSX)</p><p>Excel 97-2003 (XLS)</p><p>General Image (JPG JPEG FIG BMP PSD PNG)</p><p>MacDraw (PCT PICT)</p><p>Open Office Excel (ODS) ▼</p></div>

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!

Revised Submissions Requiring Assignment - Maney Jones, PhD

Contents: These are the revised submissions that require an Editor Assignment/Reassignment. Use the up/down arrow

Page: 1 of 1 (6 total submissions) Display 1

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name
View Submission Duplicate Submission Check Results (72%) Details Initiate Discussion History File Inventory Edit Submission Send Back to Author Classifications Assign Editor Set Final Disposition Initiate Production View Reviews and Comments Send E-mail Linked Submissions	JANETDEV111-D-14-00075R1	Original Study		11.0-36 Use Case 4 testing - multi-level questions - TYPHOON	Maney M. Alexander, xyz PhD 👤 📄 😊 # ♣️ ☀️

Author List was modified

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).

Configure PDF Watermarks

To use watermarks on your PDFs, select the image you wish to use and drag it into place on the page. Once you have done so, you may resize the image relative to the page using the drag handle. You may also adjust the desired transparency.

The interface features a row of watermark image options: CONFIDENTIAL, DO NOT DISTRIBUTE, REVISION PDF, em (blue circle), pm (red circle), and four generic image icons. An "Upload Image" button is located to the right of these options.

Below the image selection row are two main configuration panels:

- Author/Editor PDF**: Contains a "Cover page" preview area with a document thumbnail and navigation arrows. Below the preview is a "Transparency:" slider and a "Preview" button.
- Reviewer PDF**: Contains a "Cover page" preview area with a document thumbnail and navigation arrows. Below the preview is a "Transparency:" slider and a "Preview" button.

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

Watermarks and Branding on PDFs

The screenshot displays the Editorial Manager Administration interface in Google Chrome. The browser address bar shows the URL: `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 options, each represented by a small icon: 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:** This panel is titled "Body pages - portrait" and shows a preview of a document page with a large, semi-transparent watermark. Below the preview is a "Transparency:" slider and a "Preview" button.
- Reviewer PDF:** This panel is titled "Cover page" and shows a preview of a document cover page with a large, semi-transparent watermark. 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:

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.

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 Reference Checking
 - This Item Type will contain reference annotations. [Example](#)

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

- View Notes on Manuscript Details
- Edit Notes on Manuscript Details
- Turn On Manuscript Notes Flag
- Turn Off Manuscript Notes Flag
- View Production Notes
- Edit Production Notes
- View Reviewer PDF
- View Reviewer PDF After PDF Build
 - Force View Reviewer PDF After PDF Build

Submissions Needing Approval by Editor - Michael Di N...

If no Actions appear for your submission, please wait a few mi
refresh button on your browser.

Page: 1 of 1 (1 total submi

Action	Manuscript Number	Article Type	Section Category
View Submission View Reviewer PDF File Inventory Edit Submission Approve Submission Send Back to Author Revert Submission Send E-mail Linked Submissions	DEMOMD112-D-15-00009	Original Study	

Page: 1 of 1 (1 total submi

Select a PDF Version

[View Revision 2](#) | [Reviewer PDF - Revision 2](#)

[View Revision 1](#) | [Reviewer PDF - Revision 2](#)

[View Original Submission](#) | [Reviewer PDF - Original Submission](#)

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"/>	Download	Author/Editor PDF	1	3.3 MB	Apr 24 2015 2:16:51:26 PM
<input type="checkbox"/>	Download	Reviewer PDF	1	3.3 MB	Apr 24 2015 2:16:51:26 PM
<input type="checkbox"/>	Download	Author/Editor PDF	0	3.3 MB	Apr 24 2015 2:16:51:26 PM
<input type="checkbox"/>	Download	Reviewer PDF	0	3.3 MB	Apr 24 2015 2:16:51:26 PM

Select a PDF Version

[View Revision 2](#) | [Reviewer PDF - Revision 2](#)

[View Revision 1](#) | [Reviewer PDF - Revision 2](#)

[View Original Submission](#) | [Reviewer PDF - Original Submission](#)

[Cancel](#)

Submission Files

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

7PM

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"/>	Download Replace Hide	Companion File		Document	Author_Tutorial.doc	5.2 MB	Apr 24 2015 2:16:51:26 PM	Michael Di Natale Editor

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

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

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



The screenshot shows a confirmation message within a system interface. On the left, the text 'Proxy Registration Complete Confirmation' is displayed. A pink arrow points from this text to a grey message box. The message box contains the text: 'You have successfully registered Teddy Tester [user@domain.com]. Proxy as: [Author] [Reviewer]'. Below the message box, there is a link labeled 'Editor Main Menu'.

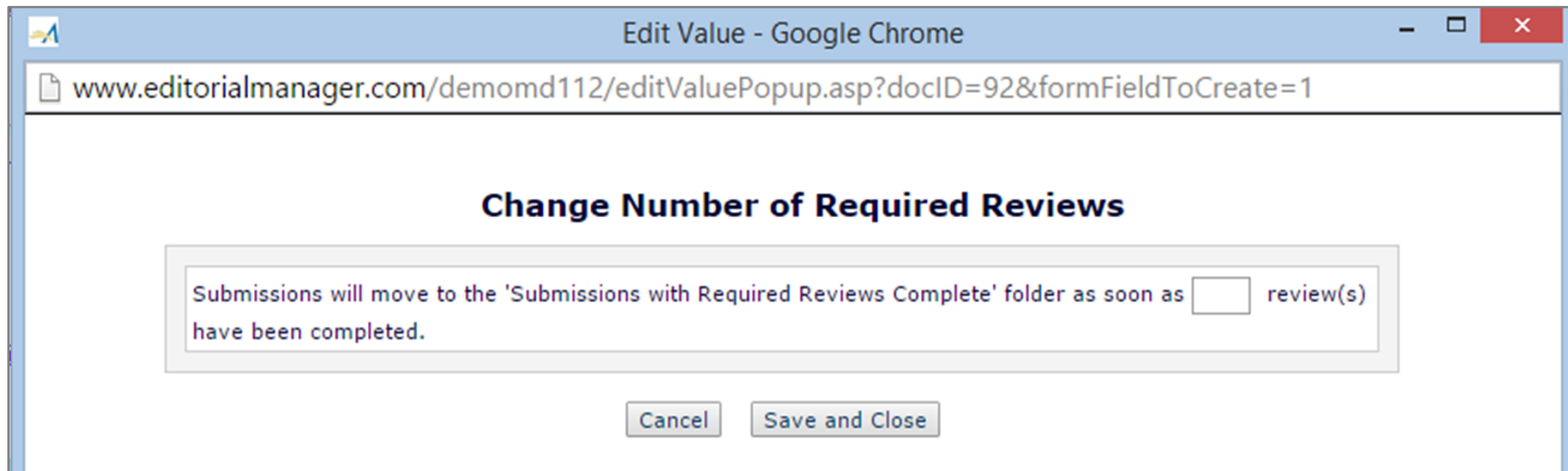
Restriction: Not available following Author or Reviewer proxy registration, as this would interrupt the invitation/assignment workflow.

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



The screenshot shows a Google Chrome browser window titled "Edit Value - Google Chrome". The address bar contains the URL: www.editorialmanager.com/demomd112/editValuePopup.asp?docID=92&formFieldToCreate=1. The main content area displays a dialog box with the following text:

Change Number of Required Reviews

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

At the bottom of the dialog box, there are two buttons: "Cancel" and "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		
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 8:08:36:110PM	Needs Approval	----	AUTHOR	0	Joe Reaves	
Oct 1 2014 8:08:11:17PM	Building PDF	----	AUTHOR	0	Joe Reaves	
Oct 1 2014 8:07:51:470PM	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 Notification	Michael Di Natale, M.D.	Under Review	0	Joe REaves
Apr 15 2015 1:40:507PM	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

Selected Authors

Invited Authors
There are no Authors Invited for this submission

Alternate Authors
There are currently no Alternate Authors selected for this submission

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.

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 results per page.

[Select All](#) / [Clear All](#)

Select	Number of Invitation Letters	Author Name	Board Member	Submissions Being Processed		Author Statistics	Invitation
				Invited	Unsolicited		
<input checked="" type="checkbox"/>	<input type="text" value="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-invide Total Inv
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	No Match: Information from File: Buzz Aldrin buzzv@nasa.gov Component: Beyond the Basics					
<input checked="" type="checkbox"/>	<input type="text" value="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: 0 Invited Submissions Received: 0 Un-invited Before Agreeing: 9 Un-invited After Agreeing: 1 Last Invited Submission Agreed: Apr 18 2013 11:46AM Last Invited Submission Received: - Last Invited Submission Declined: - Avg Days to Submit: 0	Date Last Outstand Agreed: Declined: Un-invide Total Inv

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:	<input checked="" type="radio"/> 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 <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"/> Reminder Before Invitation Response Due Date: 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"/> Reminder Past Invitation Response Due Date: 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"/> 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 <input type="text" value="10"/> days ago. If Authors have already submitted their manuscript, they will not receive a reminder.
	<input type="radio"/> Reminder Before Submission Due Date: 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"/> Reminder Past Submission Due Date: 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.
Invitation Type:	<input type="text" value="Invitations to Respond to a Proposal"/>
Handling Editor:	<input type="text" value="(All Editors)"/>
Reminder Name:	Insert Special Character <input type="text"/> <small>Maximum 200 characters</small>
Reminder Letter:	<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>	
Proposal Article Type:	<input type="text" value="Proposal for Editorial
Proposal for Perspective"/> Clear All Select All
Submission Article Type:	<input type="text" value="Editorial
Perspective
Correspondence
Reply to Correspondence"/> Clear All Select All
Section/Category:	<input type="text" value="Main Section
Letters to the Editor
Test Section
Hidden Section (hidden)"/> Clear All Select All
<input type="button" value="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: **ORCiD**

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”

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

PDF Handling:

Important Note: If 'Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)' is no restriction on the uploaded file's extension or content. All uploaded files are checked.

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 Reference Checking
- This Item Type will contain reference annotations [Example](#)
- Include this Item Type for checkCIF**

[Click here to access/download](#)
Crystallographic file
structure1.cif

Crystallography file QA tool “checkCIF”

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.

Select the workflow points that will trigger checkCIF:

<input type="checkbox"/>	
<input 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

Page	Instructions
View checkCIF Results	<p>Insert Special Character</p> <p>The results from each file sent to the checkCIF tool from this submission are available below. Click on the 'Completed' link to view the full report from checkCIF.</p> <p>View Default Instructions Revert to Default Instructions</p>

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"/>	Download	Manuscript	Manuscript	Document	My reserarch paper.docx	546.5 KB	Sept 13 2015 8:47AM		✓
<input type="checkbox"/>	Download	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
View Reference Checking Results CrossCheck/iThenticate Results (X) checkCIF Results Details Initiate Discussion	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"

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
Crystallographic File	structure1	structure1.cif	16.8 KB	Jun 21, 2015	Download	checkCIF Error
Crystallographic File	structure2	structure2.cif	20.3 KB	Jun 21, 2015	Download	Testing in progress
Crystallographic File	structure3	structure3.cif	20.5 KB	Jun 21, 2015	Download	Not yet tested
Crystallographic 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
Crystallographic File	structure4	structure4.cif	18.2 KMB	Jun 21, 2015	Download	checkCIF Error
Crystallographic File	structure5	structure5.cif	26.5 KB	Jun 21, 2015	Download	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 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

[Insert Special Character](#)

New Production Task Name:

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 letter to the Corresponding Author only

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: All Submission Production Tasks

Order	Task Type (◆=Milestone)	Assign if First Task	Trigger Publication Charges	Trigger Task(s)	Allow Repeats
1	Copy Edit [Edit]	✓			
2	Edit Graphics [Edit]		✓	Copy Edit	✓
3	Composition [Edit]				
4	Author Proof [Edit]	(✓)	✓	Composition	
5	Final Files to Print [Edit]		✓		
6	Final Files to Online Posting [Edit]		✓		
🗑 7	◆Trigger Publication Charges Due [Edit]	(✓)	✓	Final Files to Online Posting	✓

Update Insert Special Character [+ Add New Task Type](#)

Maximum Production Task Name is 100 characters

[Return to Configure Workflows and Tasks](#)

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

Edit 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.

[Open Special Character Palette](#)

Initial Question

Question text:
Do you have color figures?

Instructions for Author Response:

Part of page omitted

Integration Options

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Include in APC API Call

Custom Metadata ID ⓘ

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

<p>PDF Cover Page ⓘ</p> <p><input type="checkbox"/> Display</p>	<p>Manuscript Details</p> <p><input checked="" type="checkbox"/> Display</p> <p>Help Text: <input type="text"/></p>	<p>Transmittal Form ⓘ</p> <p><input checked="" type="checkbox"/> Display</p> <p><input type="checkbox"/> Editable</p> <p><input type="checkbox"/> Required</p> <p>Help Text: <input type="text"/></p>
--	--	--



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