



*Welcome to*  
**EMUG 2016**

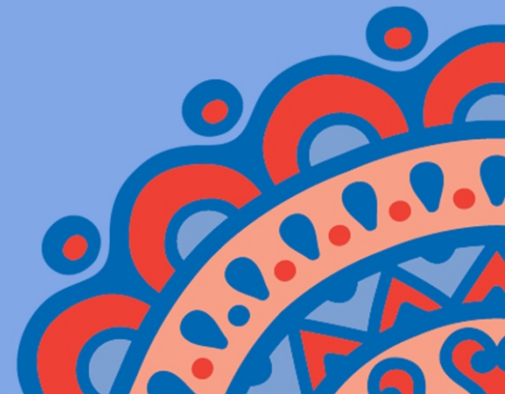
 Editorial Manager®  ProduXion Manager®

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Publish Faster. Publish Smarter.

# Overview: 13.0, 13.1 & 14.0

**Tony Alves**, Director of Product Management  
Talves@AriesSys.com



Version 13.0

...

**Upgrades begin June 2016**

# Authorship and Attribution

The order of authorship in the case of multi-authored works has no generally agreed upon truth or meaning.

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

**SOLUTION:**



CRedit “provides transparency to the contributions of researchers to scholarly published work, to enable discoverability and to improve attribution, credit, and accountability”

<http://casrai.org/credit>

# 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 select the taxonomy, specify the metadata to be collected, and define the custom instructions when attributing roles. Then on the *Set Other Author Parameters* page, you can specify Contributor Roles for your publication (along with the other parameters for Authors). On the *Set Other Author Parameters* 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.org>

### Set Taxonomy Version

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

Choose Taxonomy:   [View Taxonomy](#)

### Select Additional Metadata to be Collected

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

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

### Edit Instructions

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

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

## Set Other Author Parameters

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

### Other Author Parameters

### Include in Merge Field?

Set "Title" Text Entry Box Preference:

Given/First Name

*Part of page omitted*

Set "Country" Text Entry Box Preference:

Set "Contributor Roles" Preference:

Set "Deceased Status" Text Entry Box Preference:

Set "Other" Text Entry Box Preference:

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

- Conduct
- Data Management
- Formulation
- Funding
- Investigation
- Methodology
- Project Administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing – original draft
- Writing – review & editing

# Warning – Author List Has Been Changed!

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

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

# Warning – Author List Has Been Changed!

Hover over  shows: “Author list has been modified”

Warning appears:

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



# Warning – Author List Has Been Changed!

Revised Submissions Requiring Assignment - Ed J Editor, MD

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

Page: 1 of 1 (1 total submissions)

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

Display 10 results per page.

### Details for Manuscript Number: CAROLINEDEV1016R1 "title"

Cancel Save Save and Close

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

**Additional Manuscript Details:** Add/Edit Additional Manuscript Details

**Corresponding Author:** Duncan James Webber, Aries Systems North Andover, MA UNITED STATES [Proxy]

**Corresponding Author E-Mail:** cwebber@ariessc.com

**Author Comments:**

**Other Authors:** Jane Author  
Author Status ⚠

**Short Title:**

**Article Type:** Original Study

# Warning – Author List Has Been Changed!

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

*Author Details* page shows:

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

# Warning – Author List Has Been Changed!

### Author Detail

Corresponding Author Status

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

Other Author Status

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

To update the Co-Author's e-mail address that is associated with the submission, click on the link next to that Author's name.

To resend letters to all Other Authors with a status of 'No Response' and use the link next to that Author's name.

Corresponding Author Status

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

Other Author Status

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

Removed Authors

Author Name	Removed in Revision	E-mail Address	Phone Number	Education
Samuel Becket	R1 - Jason Author	trash1@ariessc.com	0000-0001-9524-1592	M.D., Ph.D
Annie L. Emnop	R1- Duncan Webber, MD <small>proxied by Editor, MD</small>	trash2@ariessc.com	0000-0001-9524-1592	

# File Type Limits on Submission

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

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

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

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

# File Type Limits on Submission

## Edit Submission Item Type

### Restricted File Types

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

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

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

#### New Submission

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

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

- Inclusive: Allow only these files types

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

#### Revised Submission

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

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

- Inclusive: Allow only these files types

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

Cancel

Submit

# File Type Limits on Submission

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

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

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

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

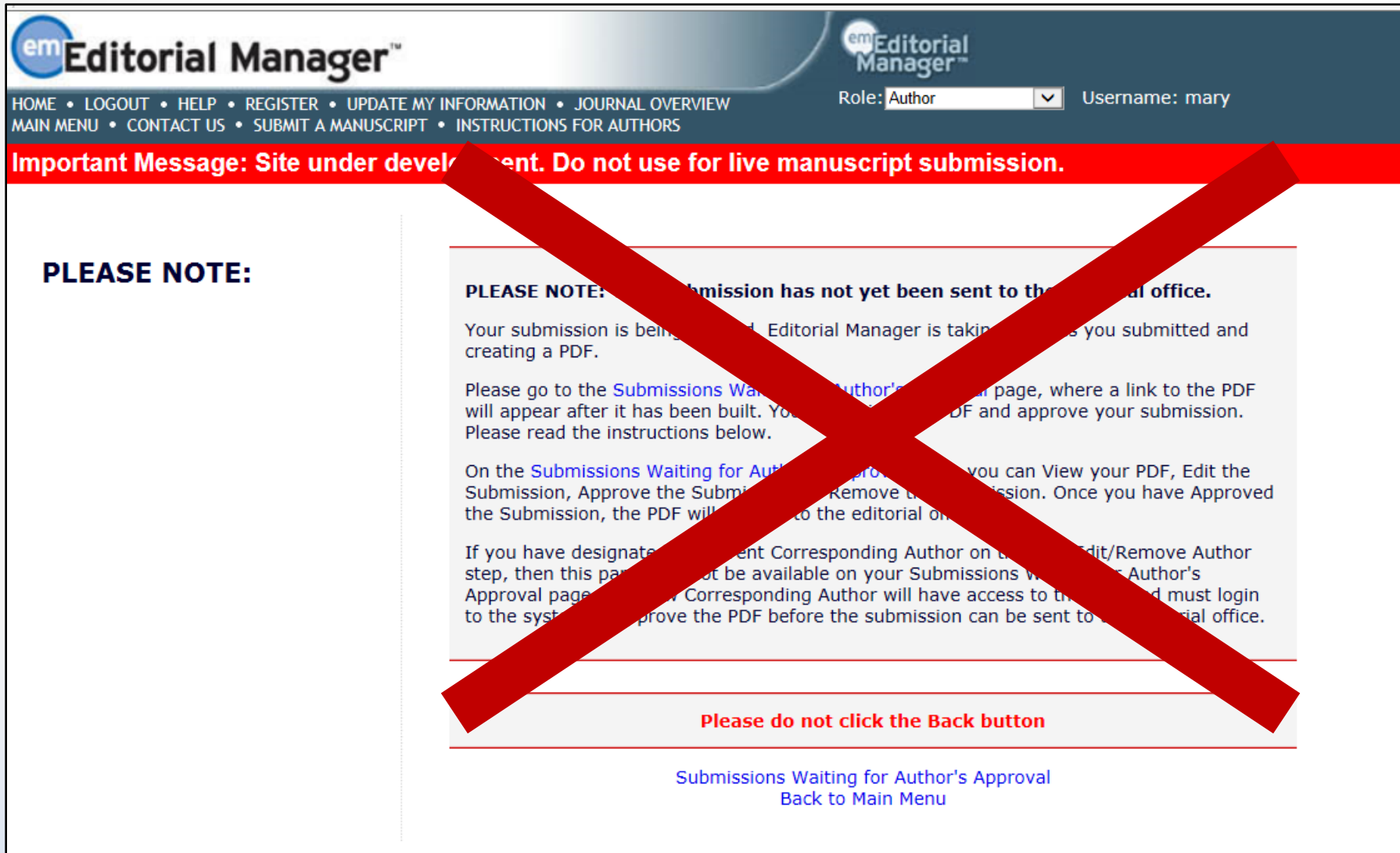
The following functions ignore restrictions: Productions Tasks, Attachments, File Inventory, Transmittal Form.

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

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

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

# Customized Text on PDF Build “Wait” Page



The screenshot shows the Editorial Manager interface. At the top left is the logo "em Editorial Manager™". To the right of the logo is a navigation menu with links: HOME • LOGOUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW • MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS. Further right, there is a "Role:" dropdown menu set to "Author" and a "Username:" field containing "mary".

A prominent red banner across the top of the main content area contains the text: "Important Message: Site under development. Do not use for live manuscript submission." Below this banner, on the left side, is a section titled "PLEASE NOTE:". The main content area is a light gray box with a red border, containing the following text:

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

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

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

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

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

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



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

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

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

Default instructions still exist and can be restored.

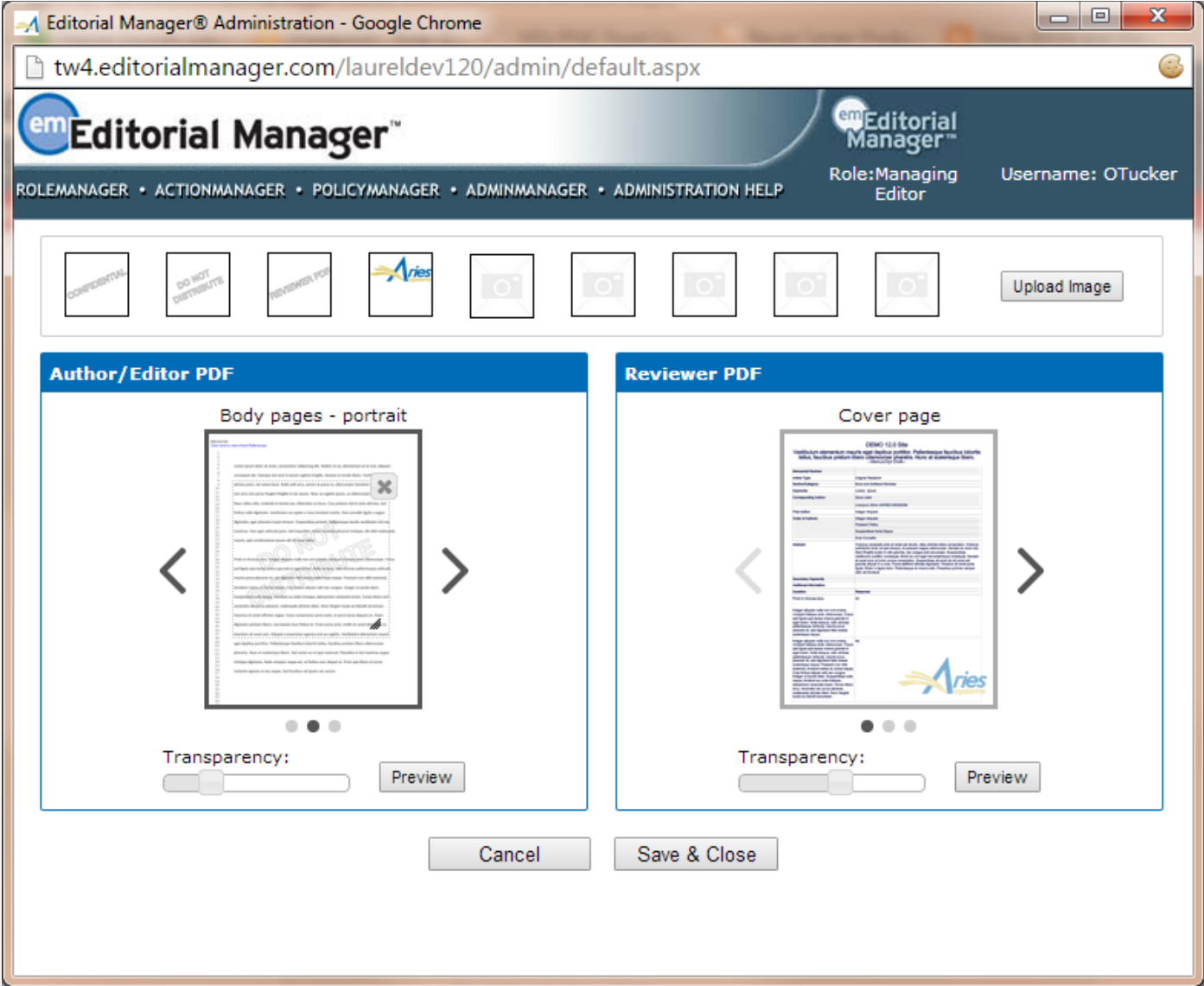
Default instructions have been modified for consistent terminology and style.

# 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



# Security for Downloading Files via PDFs

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

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

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

# Security for Downloading Files via PDFs

**Edit Submission Item Type**

[Insert Special Character](#)

Item Type:   
*Maximum 256 characters*

Item Type Family:  ▼

This Submission Item Type is a Companion File (not built into PDF)

Reviewer PDF Handling  ▼

Author/Editor PDF Handling  ▼

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

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

# Access to Author/Editor & Reviewer PDF

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

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

# Access to Author/Editor & Reviewer PDF

RoleManager Permission allows Editor access to Reviewer PDF.

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

Quicklinks

## Revised Submissions - Mary François Smith, PhD

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

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

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

**Select a PDF Version**

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

Close

# Access to Author/Editor & Reviewer PDF

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

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

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

**Submission PDFs**

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

**Select a PDF Version**

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

[Close](#)

**Submission Files**

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

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

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

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

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



# Access to Author/Editor & Reviewer PDF

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

If no Actions appear for your submission, please wait a few minutes for your PDF to be built. The Actions appear automatically when your PDF is built. If you do not see your PDF within a few minutes, click the refresh button on your browser.

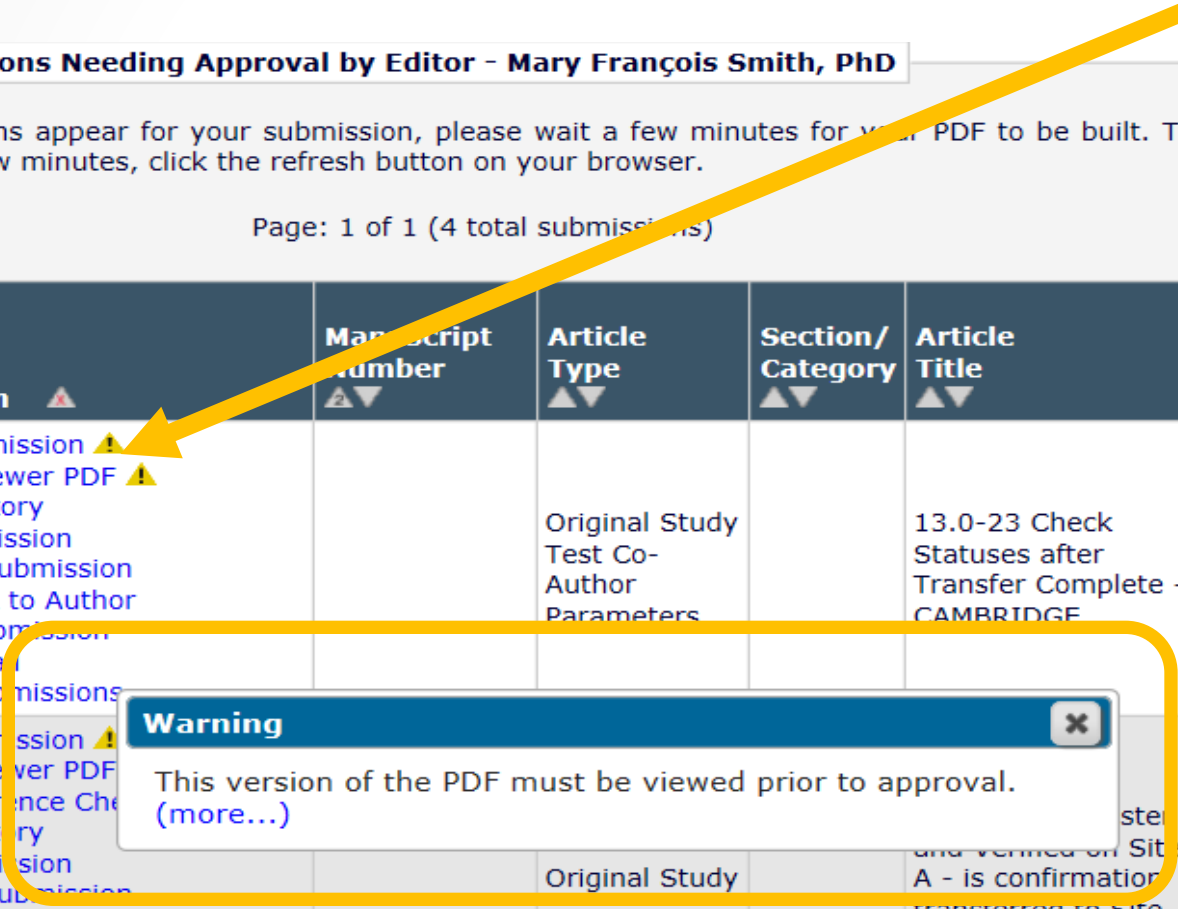
Page: 1 of 1 (4 total submissions)

Display 10 results

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

**Warning** ✕

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



# Power Grid Expansion

The new customizable grid will be expanded to additional pages

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

# Power Grid Expansion

Quicklinks

## View All Assigned Submissions - Mary François Smith, PhD

**Contents:** This page lists all submissions that have been assigned to an Editor, for which the Editor's decision has not yet been made. This includes submissions with invited Reviewers, submissions out for review, submissions requiring a decision, and submissions which have a subordinate Editor's decision but not a decision from the top Editor in the decision-making chain.

Page: 1 of 2 (179 total submissions)

1 2

100 results per page

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor with Current Responsibility	Review Status	Editor Decision
<a href="#">Action Links</a> (30%)	DEMO121-D-15-00003	Original Research	Testing Optional URI	Mary François Smith PhD	Sep 14 2015 1:56PM	Sep 16 2015 10:06AM	Received by Editor	Dave Lister		
<a href="#">Action Links</a> (63%)	DEMO-D-05-00025R1	Original Research	Demonstration of Edit Submission	Anthony Author MD	Jun 17 2005 11:00AM	Sep 16 2015 9:58AM	Received by Editor			
<a href="#">Action Links</a> (64%) (60%)	DEMO120-D-15-00002	Original Research	Reference checking example 6-17-2015	Mary François Smith PhD	Jun 17 2015 4:47PM	Jun 17 2015 4:51PM	Reviewers Assigned			
<a href="#">Action Links</a> (12%)	DEMO-100-76	Original Research	Potential food production from forage legume-based-systems in Europe: an overview	Tony Kelleher	Feb 26 2014 10:25AM	Jun 17 2015 4:16PM	Reviewers Assigned			
<a href="#">Action Links</a> (32%)	DEMO-100-75	Original Research	Educational initiatives in southern Norway	Tony Alves	Feb 19 2014 6:14AM	Jun 17 2015 4:12PM	Reviewers Assigned			
<a href="#">Action Links</a>	DEMO112-D-	Original		Alpha	Nov 4 2014	Dec 3 2014	Reviewers			

### Grid Options

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

Column Header	Fixed	Show
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manuscript Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Article Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Author Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Initial Date Submitted	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Status Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Current Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Editor with Current Responsibility	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Review Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Editor Decision	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Section/ Category	<input type="checkbox"/>	<input type="checkbox"/>

Cancel

Submit

# 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 bordered box. 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].'. Below this, it says 'Proxy as: [Author] [Reviewer]', where 'Author' and 'Reviewer' are highlighted in yellow. At the bottom of the message box, there is a link labeled 'Editor Main Menu'.

**Proxy Registration Complete Confirmation**

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

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

[Editor Main Menu](#)

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

# Change Status when Changing Required Reviewers Count

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

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

# Change Status when Changing Required Reviewers Count

## Change Number of Required Reviews

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

Cancel

Save and Close

# Change Status when Changing Required Reviewers Count

## Reviewer Assigned

Event	New Document Status	Warnings	Alternative Text for Authors
Request Unregistered Reviewer	No Change		
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 8:08:07:07PM	Building PDF	----	AUTHOR	0	Joe Reaves
Oct 1 2014 8:07:54:470PM	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	<a href="#">Editor Notice: Required Reviews Complete</a>	Michael Di Natale, M.D.	Required Reviews Completed	0	Michael Di Natale, M.D.
Apr 15 2015 1:46:567PM	<a href="#">Reviewer Agree Notification</a>	Michael Di Natale, M.D.	Under Review	0	Joe REaves
Apr 15 2015 2:48:587PM	<a href="#">Reviewer Invitation</a>	Joe REaves	Under Review	0	Michael Di Natale, M.D.
Mar 10 2015 1:33:20:690AM	<a href="#">Editor Invitation</a>	Michael Di Natale, M.D.	Editor Invited	0	Michael Di Natale, M.D.

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

# Invited Submissions Assigned to Schedule Groups

When a Proposal is initiated the editor can assign it to a Schedule Group.

This means that when related invited submissions are received, they will automatically be associated with that Schedule Group.

This assists in the management of Special Issues, Review Journals, and other publications that consist of mostly solicited articles.

# Invited Submissions Assigned to Schedule Groups

Article Type:   
*Maximum Article Type name is 75 characters.*

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

Assign to Schedule Group:  ▼  
Hidden  
Optional  
Required

**Hide** When you **Hide** an article, the Article Type will be deactivated (not available for new or revised manuscripts).

Allow file uploads from arXiv.org server

Allow file uploads from

### Initiate Proposal

Selecting a Schedule Group is required. Once a Schedule Group has been selected, information from that Schedule Group will be displayed automatically, and Proposal creation can continue. A Schedule Group can be added to the list by clicking the 'Add Schedule Group' link.

* <b>Article Type</b>	<input type="text" value="Proposal for Editorial"/> ▼
* <b>Schedule Group</b>	<input type="text" value="Please Choose a Schedule Group"/> ▼ <a href="#">Add Schedule Group</a>

# Invited Submissions Assigned to Schedule Groups

## Edit Schedule Group Details/Add Submissions




[additional content removed]

### Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Author Name	Target Number of Pages	Target Start Page	Target End Page
<a href="#">Production Details</a> <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	2	DEMO-15-I-00001	Chapter	Health Maintenance Overview	Richard E. Lyons	11	1	11
+Additional Manuscript Details								
<a href="#">Production Details</a> <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	3	DEMO-15-I-00002	Chapter	Health Maintenance for Infants and Children	Stacey Lacey	15	12	27
+Additional Manuscript Details								



### Pre-selected Submissions

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Author Name
<a href="#">Details</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a>		DEMO-15-I-00003	Brief Report	Health Maintenance	Arthur L. Sides
<a href="#">Details</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a>		DEMO-15-I-00004	Original Study	Weight Management	Ebeniezer N. Gr
<a href="#">Details</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a>		DEMO-15-I-00005	Original Study	Fatigue	Janet Swatski
<a href="#">Details</a> <a href="#">Transmittal Form</a>		DEMO-15-I-00006	Original Study	Dizziness	Jocelyn Wipper

# Predefine Title for Invited Submissions

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

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

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

# Predefine Title for Invited Submissions

Configuration allowing the Editor to predefine Title:

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

Allow Editor to predefine submission title values:

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

# Predefine Title for Invited Submissions

Configuration allowing the Editor to predefine Title:

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

## Proposals/Commentaries

Use Proposals Details Layout

Search All Proposals

Initiate Proposals

Invite Authors/Solicit Commentaries

Select Alternate Authors

Promote Alternate Authors

Remove Alternate Authors

Lock/Unlock Predefined Article Title

Override Author Invited Submission Due Dates

View All Proposals and Submissions with Commentaries

# Upload Author List File to Launch Invitation Process

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

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



# Upload Author List File to Launch Invitation Process

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

[Manuscript Details](#)

**Author Search**

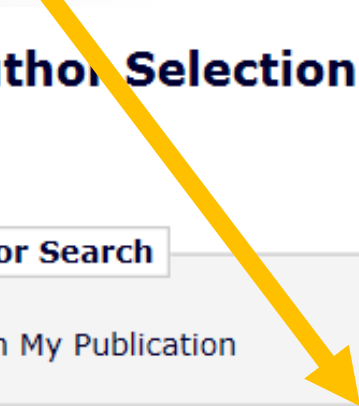
Search My Publication

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

**Selected Authors**

**Invited Authors**

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



# Upload Author List File to Launch Invitation Process

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

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

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

### Upload Author List

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

Browse your computer:

Choose File

Or Drag & Drop a File Here



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

# Upload Author List File

## Author Candidates

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

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

Remove Import

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

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

# 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"/> <b>Outstanding Invitations:</b> Send an automated reminder e-mail to Authors who were invited to submit for a Proposal or for a Commentary on another submission exactly <input type="text" value="10"/> days ago. If Authors have already agreed to or declined the invitation, they will not receive a reminder.
	<input type="radio"/> <b>Reminder Before Invitation Response Due Date:</b> Send an automated reminder e-mail for invitations that are exactly <input type="text" value="7"/> days before their Invitation Response Due Date. Reminders will be sent to Authors who have not agreed to or declined their invitation yet.
	<input type="radio"/> <b>Reminder Past Invitation Response Due Date:</b> Send an automated reminder e-mail for invitations that are exactly <input type="text" value="7"/> days past their Invitation Response Due Date. To send reminders for invitation responses that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who have not agreed to or declined their invitation yet.
	<input type="radio"/> <b>Outstanding Submissions:</b> Send an automated reminder e-mail to Authors who agreed to submit for a Proposal or for a Commentary on another submission exactly <input type="text" value="10"/> days ago. If Authors have already submitted their manuscript, they will not receive a reminder.
	<input type="radio"/> <b>Reminder Before Submission Due Date:</b> Send an automated reminder e-mail for invited submissions that are exactly <input type="text" value="7"/> days before their submission due date. Reminders will be sent to Authors who have agreed to their invitation, but have not submitted their manuscript yet.
	<input type="radio"/> <b>Reminder Past Submission Due Date:</b> Send an automated reminder e-mail for invited submissions that are exactly <input type="text" value="7"/> days past their submission due date. To send reminders for invited submissions that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who have agreed to their invitation, but have not submitted their manuscript yet.
Invitation Type:	<input type="text" value="Invitations to Respond to a Proposal"/>
Handling Editor:	<input type="text" value="(All Editors)"/>
Reminder Name:	<input type="text" value="Insert Special Character"/> <small>Maximum 200 characters</small>
Reminder Letter:	<input type="text" value="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:	<input type="text" value="Proposal for Editorial&lt;br/&gt;Proposal for Perspective"/> <a href="#">Clear All</a> <a href="#">Select All</a>
Submission Article Type:	<input type="text" value="Editorial&lt;br/&gt;Perspective&lt;br/&gt;Correspondence&lt;br/&gt;Reply to Correspondence"/> <a href="#">Clear All</a> <a href="#">Select All</a>
Section/Category:	<input type="text" value="Main Section&lt;br/&gt;Letters to the Editor&lt;br/&gt;Test Section&lt;br/&gt;Hidden Section (hidden)"/> <a href="#">Clear All</a> <a href="#">Select All</a>

# ORCID iD Authenticate Deep Link

Publications need to be sure all of the people in their database are disambiguated so that effective communication can happen between various systems – like peer review, society membership, publishing platforms, granting agencies, repositories, etc.

**SOLUTION:**



**A new deeplink will allow users to check that their ORCID iD is authenticated, and allow them to get an authenticated ORCID iD if they don't have one.**

# Crystallography file QA tool “checkCIF”

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

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

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

# Crystallography file QA tool “checkCIF”

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

## Configure checkCIF

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

Cancel

Submit

Enable checkCIF

### Select the workflow points that will trigger checkCIF:

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



# Crystallography file QA tool “checkCIF”

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

Close

Re-Send Files to checkCIF

### Submission Files

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

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

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

# Trigger APC API – Payment Due in Production Tracking

Publications using the APC API to collect OA fees are also interested in using the same mechanism to collect other sorts of fees, such as page charges, color charges, reprints, etc. Relevant data for some of these items are often not available until the production process is underway.

**SOLUTION:** The APC API is enhanced to allow publications the freedom to charge multiple fees during the production process.

Production Tasks are used to trigger fee requests.

# Trigger APC API – Payment Due in Production Tracking

## Configure APC Processing

Select an **Editorial** Event to Trigger the Publication Charges Payment Due **Event**

Notify Author of selected decision(s):

Please select Decision Term(s)  
Accept  
Revise  
Revise, No Review

Set the Final Disposition to 'Accept', 'Accept and Transmit' or 'Accept for Extraction'

**None (Publication Charges Payment Due must be triggered by assigning a Submission Production Task)**

NOTE: If an Editorial event IS selected to trigger the initial call, subsequent Payment Due calls MAY be triggered as Submission Production Tasks.

# Trigger APC API – Payment Due in Production Tracking

## Edit Submission Production Task

Cancel

Submit

[Insert Special Character](#)

New Production Task Name:

Trigger Publication Charges Due

*Maximum Production Task Name is 100 characters*

- Hide** When you **Hide** a Production Task Name, the Production Task Name will be deactivated (not available for assignment).

### Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assigner and a specific user to receive the task. You should also configure

*Part of page omitted*

Production Task Assignment can be configured to also trigger a Publication Charges Payment Due letter and associated status change; this may be in addition to the initial trigger that occurs when the Author is notified of a selected decision or when the Final Disposition is set to Accept.

- Trigger 'Publication Charges Payment Due'

Letter Options:

Trigger all ActionManager 'Publication Charges Payment Requested' letters

Send following letter to the Corresponding Author only

Please Choose a Letter



Do not trigger if APC Status is already 'In Process' or 'Complete'

Do not trigger on repeated assignment of this Task

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

Publications using the APC API to collect OA fees sometimes need to pass non-standard information along to the payment system. For example, there may be a society membership number that allows for a discount.

**SOLUTION:** The APC API can include data collected in the Submission Questionnaire feature or via AMDs. This allows for the collection on non-standard data to be passed to third party payment systems.

# Import from S1 to EM/PM

Publishers use different systems for different publications and for different processes.

Some publishers wish to transfer (cascade) submissions between two publications that use different editorial systems.

Some publishers use S1 for editorial, but PM for production tracking.

**SOLUTION: Publishers can import submission data and files from a ScholarOne site to either Editorial Manager or Production Manager using XML compliant with the Cadmus DTD.**

# Import from S1 to EM/PM

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

- For transfer to EM, submission can be found in the Transferred Submissions folder
- For transfer to PM, submission is imported with a Final Disposition of “Accept” and with production initiated
- XML compliant with the Cadmus DTD version
- S1 import works alongside other imports, such as Ingest and transfer from other EM publications
- Contact your support rep to enable

# New Schedule Group Family to Facilitate Book Processing

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

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



# New Schedule Group Family to Facilitate Book Processing

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

For book processing there are multiple levels.

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

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

Quick key to understanding the new book structure:

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

# New Schedule Group Family to Facilitate Book Processing

EM/PM is enhanced:

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

# Version 13.1

...

**Beta to begin September/October 2016**

**Upgrades January/February 2017**

# Register via ORCID

Registering on any system is an arduous task, especially if a lot of information is required, and especially when you have already entered the same data in so many other places!

It is overwhelmingly accepted throughout STM publishing that ORCID iD's are a necessary standard that assists in disambiguating people and facilitates system interoperability. Everyone needs to get and use their ORCID iD!

**SOLUTION: Fetch registration data from ORCID to make registration EASIER!**

**Push users to register an ORCID iD and pull that Authenticated ORCID iD into EM/PM!**

# Register via ORCID

## Pre-registration Page

To register to use the Editorial Manager system, please enter the requested information. Upon successful registration, you will be sent an e-mail with instructions to verify your registration.

### Choose a Registration Method

 Use your ORCID

### Or type in your details:

First Name\*

Last Name\*

E-mail Address\*

---

WARNING - If you think you already have an existing registration of any type (Author, Reviewer, or Editor) in this system, please DO NOT register again. This will cause delays or prevent the processing of any review or manuscript you submit. If you are unsure if you are already registered, click the 'Forgot Your Password?' button.

If you are registering again because you want to change your current information, changes must be made to your existing information by clicking the 'Update My

NOTE: A PolicyManager configuration can force registration via ORCID upon clicking *any* 'Register' action link.

# Register via ORCID

The following EM/PM fields are populated on the *Registration* page:

Given/First Name

Family/Last Name

Email (possibly multiple)

Keywords

Position

Institution

Department

City

State or Province

Country

# ORCID Authentication for Corresponding Authors

Publications want to collect ORCID IDs from Authors so that they can push relevant data along the ecosystem.

- Disambiguation
- Access and Entitlement
- Identification of funding sources

**SOLUTION: Publications can REQUIRE ORCID iD's at submission from Corresponding Authors.**

It is already possible to request ORCID IDs at submission – but it is optional.

# ORCID Authentication for Corresponding Authors

**New Submission**

➔

**Please Select an Article Type**

---

Please select an Article Type of 'Original Article', unless you are submitting a Letter to the Editor, or have previously contacted the publication to gain agreement to submit another type.

---

Choose Article Type

---

**An Authenticated ORCID iD is required for this Article Type**

This publication requires that Authors Link to their ORCID record to Authenticate their ORCID iD before they submit. You only need to do this once in order to permanently associate your ORCID record with your user record here.

Use the button below to go to ORCID, log into your record there – or create one – and authorize the return of your ORCID Identifier. You must do this unless you intend to change the designated Corresponding Author for this submission.

ORCID iD:	None
	<input type="button" value="Link to ORCID Record"/>

---



# ORCID Authentication for Corresponding Authors

## Previous Registration Found

This ORCID iD is already linked to a different User Record.

We have found an existing User account that is already linked to the ORCID Identifier you have just authorized us to retrieve. This means that you must have already registered with this publication and linked your ORCID iD to that account.

Because only you can authorize access to your ORCID profile, you can simply click the button below to switch to the account you previously created, and submit your manuscript.

After switching, before Submitting your Manuscript, you may wish to check that your existing details are up-to-date using 'Update My Information' in the main menu bar.

ORCID iD:	<a href="#">1234-1234-1234-123X</a> 
Name:	Dr John P Smith
Institution:	University of Computology
Country:	United States
E-Mail:	jpsmith@emtesting.co.uk
Registered:	23 November 2013
	<a href="#">Switch to this Login</a>

# Hide “Preferred Method of Contact”

Some publications do not want to give users an option to select a Preferred Method of Contact other than email.

**SOLUTION:** Publications can set Preferred Method of Contact to “hidden”, thus making email the only preferred method, as well as making email a required field.

**NOTE:** Users who have already identified something other than email as their preferred method of contact, and who have not entered an email address, will continue to have their preference enforced. However, they will no longer see the Preferred Method of Contact setting when they go to update their record, and they will be forced to enter an email address when submitting that page.

# Excluding People from Reminders

Sometimes a particular user, often a valued reviewer or author, asks not to receive reminder emails. It is within the publication's interest to heed this request and exclude the user when sending reminders.

Sometimes a user will let an editorial office know that they will soon submit a review or a revision. The editorial office then wants to be sure that no reminder gets sent to that person.

This is easily handled when sending manual reminders – but not possible when automated reminders are configured.

**SOLUTION:** A new checkbox in a user record excludes a user from receiving automated reminder emails.

# Excluding People from Reminders

## Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

### John Adams

Self-Registered:  
Jun 21 2005 10:54AM

Last Modified:  
Jun 21 2005 10:54AM

Inactivate this User

Send Login Details

- Exclude this user from receiving all batch and reminder emails:
  - Always
  - When Unavailable Dates are active

*(Enabled by Mark Watney, Managing Editor, Oct 13, 2015)*

### User Information

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

User Name \*

Password \*

Password Rules

Default Login Menu

Editorial Menu ▼

Available as a Reviewer?

Yes  No

Board Member?

Yes  No

Forbidden as a Reviewer?

Yes  No

Reviewer Role \*

None ▼

Publisher Role \*

None ▼

Editorial Role \*

None ▼

Editor Description

Activity Details

### Personal Information

Title

(Mr., Mrs., Dr., etc.)

Given/First Name \*

Secondary Given/First Name

# Additional Criteria in Search Submissions

Because submission records are “actionable” from Search Submissions, this tool is one of the most used features in EM/PM. There are always new pieces of data that people would like to be able to search on.

**SOLUTION: Four new field have been added:**

- **Technical Check Complete Date**
- **Editor Decision**
- **Handling Editor Role**
- **Assigned Editor Role**

# Additional Criteria in Search Submissions

**Technical Check Complete Date:** only available if Tech Check is enabled; value is a date; only Editors with access to Tech Check will get Action Link in results.

**Editor Decision:** the most recent decision for the current revision of the submission, the Value dropdown will display the Decision Terms configured on the *Edit Editor Decision Terms* page.

**Handling Editor Role:** the Value dropdown will display the existing Editor roles configured on the *RoleManager Editor Roles* page.

**Assigned Editor Role:** the Value dropdown will display the existing Editor roles configured on the *RoleManager Editor Roles* page.

**First Receipt Date:** the first date a submission was received, as opposed to Initial Date Submitted, which reflects the date the submission actually enters the workflow; value is a date.

# Submit Manuscript User Interface Improvements

**Incomplete Submission Step Indicator** – When an author proceeds from a step without completing all required information, a red warning icon will be used in place of the checkmark for that step.

# Incomplete Submission Step Indicator

## Revised Submission

PONE-D-14-32544R1

- ✓ Select Article Type
- ✓ Enter Title
- ⚠ Add/Edit/Remove Authors
- ✓ Funding Information
- ✓ Select Section/Category
- ✓ Submit Abstract
- ✓ Enter Keywords
- ✓ Additional Information
- ✓ Enter Comments
- ✓ Suggest Reviewers
- Oppose Reviewers
- ✓ Respond to Reviewers
- ⚠ Attach Files

### Summary Following Attach Files

Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required Items are marked with \*. You can change the order by re-numbering the files.

One or more required items are missing:

	Online	Offline		Online	Offline
<b>*Cover Letter</b>	0		<b>*Manuscript</b>	0	
Figure	4		Supporting Information	1	
Supporting Information - Compressed/ZIP File Archive	0		Striking Image	0	0
Other	0		Revised Manuscript with Track Changes	0	
Response to Reviewers	0		LaTeX Source File (TEX file)	0	
LaTeX Bibliography (BIB file)	0				

You cannot complete your submission until the following requirements are met (click on the bold text to be navigated to the appropriate step):

Required information is missing for the following Authors. Please go back to the **Add/Edit/Remove Authors** step or click the Author's name below to enter the required information:

[Yang Zhao](#)



# Transfer Co-Author Questionnaires

Transferring submissions from one publication to another in a family of publications is strategically important for many publishers.

Automatically transferring submission files and data means the Author has less work to do and results in a positive experience!

Currently the Co-Author Questionnaires do not transfer – resulting in extra work for authors and contributors.

**SOLUTION: Co-Author Questionnaire responses will be transferred as part of any EM-to-EM transfer.**

# Article Type ID

Transferring submissions from one publication to another in a family of publications is strategically important for many publishers.

Different publications use different terminology for essentially the same types of articles; for example: “Original Research”, “Original Study”, “Original Article”, etc.

Today EM/PM uses a string match in transfer, import and export functions, which can lead to confusion and mistakes.

**SOLUTION: Use “Custom Metadata IDs” for Article Types.**

Note: These are already available for Custom Questions and AMDs.

# Article Type ID

## Edit Article Type

Cancel

Submit

Article Type:

Maximum Article Type name is 75 characters.

Warning: changing the Article Type name will apply the name change to all submissions of this type, including

Family: Regular      Editor Use Only:

**Hide** When you **Hide** an Article Type, the Article Type will be deactivated (not available for new or revised manuscript

Allow file uploads from arXiv.org server

Custom Metadata ID:

[Insert Custom Metadata](#)

**Similarity Check:**

**Duplicate Submission**

**Author Parameters**

Number of days Author  
Revise Submission:

Custom Metadata ID

This ID is used to uniquely identify this question within Editorial Manager and Prodxion Manager. It may also be used to identify matching questions in a separate publications (such as during submission transfer).

This field must be unique within the scope of a single Journal database. It may not be more than 128 characters and must be a valid XML name. i.e. it must begin with a letter and may only contain letters and symbols in the following sets: A-Z, a-z, 0-9

30

**Subsequent Revisions**

30

You i  
the C  
can l  
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You i  
Conf

Set t  
Date

# Custom Metadata ID Lists

EM/PM Custom Metadata ID functionality is tremendously useful for matching non-standard types of data when importing, ingesting, transferring, exporting or transmitting from one publication to another, or to a third party system.













But remembering all those ID's is a major hassle!!!

**SOLUTION: Build predefined lists of “Custom Metadata IDs” so that the user can select the ID, rather than type the ID.**

Note: there are three functions that use Custom Metadata IDs:

- Additional Manuscript Details (AMDs)
- Custom Questions
- Article Types

# Custom Metadata ID Lists

Custom Metadata ID List		+ Add Custom Metadata ID	
	 	Original_Paper   Standard article, usually presenting new results	Article Type
	 	Review_Paper   Standard article, interpreting previously published results	Article Type
	 	Color_Figures_1   Used for Custom Questions	Custom Question
	 	Quick_Review_1   Used for AMD's	AMD

+ Add Custom Metadata ID

## Enter Custom Metadata ID Details



Custom Metadata ID:

Description:

Usage:

- Additional Manuscript Details
- Article Type
- Custom Question



# Custom Metadata ID Lists – Article Type

Article Type:

Maximum Article Type name is 75 characters.

Warning: changing the Article Type name will apply the name change to all submissions of this type, including previously submitted n

Family: Regular

Editor Use Only:

- Hide When you Hide ar
- Allow file uploads from ar

Custom Metadata ID: i

[Insert Custom Metadata ID](#)

Similarity Check:

**Insert Custom Metadata ID**

You can select a Custom Metadata ID by clicking the name [\(more...\)](#)

<a href="#">Original_Paper</a>	<a href="#">View Description</a>
<a href="#">Review_Paper</a>	<a href="#">View Description</a>

Duplicate Submission Check:  Check for duplicate submissions to Editorial Manager

You must also enable the che  
Configure Duplicate Submissi

et up Automa  
milarity Chec  
ed to send file  
chnical Check  
page.

# Reviewer Invite Letter for Revisions

Publications want Reviewers to know that a review invitation or assignment is for a revision of a paper they previously reviewed.

Sometimes a new Reviewer is asked to review a revision of a paper, and there needs to be an invitation letter sent that is different than that sent to the other Reviewers who reviewed the initial submission.

**SOLUTION:** Two alternate default letters can be configured to be sent to Reviewers. The system will check to see if the Reviewer has been involved in the previous round of review, or if it is a new Reviewer reviewing a revision, and send the appropriate letter (or present it for customizing).

# Reviewer Invite Letter for Revisions

## Reviewer Assigned

Event	Scientific Reviewer Letters
Reviewer Invited	<i>Original Submission:</i> Reviewer Invited <i>Revision - Re-Invite:</i> Reviewer Invited <i>Revision - First Invite:</i> Reviewer Invited <a href="#">Select Letters</a>
Reviewer Assigned (Not Invited)	<i>Original Submission:</i> Reviewer Assigned <i>Revision - Re-Invite:</i> Reviewer Assigned <i>Revision - First Invite:</i> Reviewer Assigned <a href="#">Select Letters</a>
Reviewer Agree	<i>Original Submission:</i> Reviewer Agree - Instructions (letter name is long so it wraps) <i>Revision - Re-Invite:</i> Reviewer Agree - Instructions (letter name is long so it wraps) <i>Revision - First Invite:</i> Reviewer Agree - Instructions (letter name is long so it wraps) <a href="#">Select Letters</a>
Reviewer Decline	NONE
Review Due Date Changed	NONE
Un-invite Reviewers Before Agreeing to Review	Reviewer Uninvited Notice
Un-assign Reviewers After Agreeing to Review	Reviewer Uninvited Notice
Promote Alternate Reviewers	<i>Original Submission:</i> Reviewer Invited <i>Revision - Re-Invite:</i> Reviewer Invited <i>Revision - First Invite:</i> Reviewer Invited <a href="#">Select Letters</a>
Re-open Review	NONE
Review Assignment Completed	Reviewer Thank You



# Alternate Reviewer Promotion Option

If a Reviewer declines an invitation, an Alternate Reviewer who has the SAME Reviewer Role is automatically promoted as a replacement.

For some publications, matching Reviewer Roles is not an important criteria for promotion. However, there is no way to disable the role-matching criteria.

**SOLUTION:** A new configuration option to allow auto-promotion of Alternate Reviewers that have a *different* RoleManager role from that of the Reviewer he or she is replacing.

# Alternate Reviewer Promotion Option

## Reviewer Parameters:

Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.

Number of Days Reviewer has to Respond to Invitation:

Automatically Un-assign Reviewers n days after 'Date Review Due'

Automatically Un-assign late Reviewers with partial review saved.

## New and Revised Submissions



Automatically Promote Alternate Reviewers:



Only Promote unlinked Alternate Reviewers with MATCHING Roles



- Continue promoting Alternates until there are no more Alternates in queue
- Only promote Alternate Reviewers when the combined number of Agreed and Completed Reviews is less than the current value of the Submission's own 'Required Reviews Complete' value

# Assign an Author

Currently Editors can only INVITE Authors to submit manuscripts for things like special issues, review articles and book-type publications.

When participation in a project is already committed, responding to an invitation is an extra, unnecessary step for contributors. It would be more efficient to ASSIGN the authors.

**SOLUTION:** The Author Candidates grid is enhanced to provide separate options for 'Invite' and 'Assign' in place of the existing 'Select' option.

# Assign an Author

Ability to assign an Author is controlled by Editor RoleManager permission.

Two new ActionManager events, “Author Assigned (Not Invited)” and “Author Unassigned”, are used to send letters. They do not affect Document Status.

The “Assigned” designation can be included in the Author List File (ALF) used in the Upload Author List File function.

# Assign an Author

## Author Candidates

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

Invite All / Assign All / Clear All      Page: 1 of 2 (12 total Authors)      1 2 >> >|      Display 10 results per page.

Select As		Number of Letters	Author Name	Board Member	Submissions Being Processed		Author Statistics		Invitation Statistics		
Inv.	Asn.				Invited	Unsolicited	Agreed and Awaiting Submission:	Assigned Submissions Received:	Invited Submissions Received:	Date Last Invited:	Outstanding Invitations:
<input type="checkbox"/>	<input type="checkbox"/>		Alfonso Di Girolamo, Jr	No			2	2	0	-	0
<input type="checkbox"/>	<input type="checkbox"/>		Michael Di Natale, MD	No							
<input type="checkbox"/>	<input type="checkbox"/>		James G. Diamond, MD	No							

Agreed to Submit - Nov 5 2015

Invite All / Assign All / Clear All

Select As		Number of Letters	Author Name	Board Member
Inv.	Asn.			
<input type="checkbox"/>	<input type="checkbox"/>		Alfonso Di Girolamo, Jr	

# Persistent Invited Submission Numbering

A Proposal and the invited submissions related to the Proposal are linked in the system. However, it is not always obvious to an Editor that a submission has a parent Proposal when looking at the submission in isolation.

It would be useful to incorporate an identifier, such as the Proposal's manuscript number, into the manuscript number of the invited submission, in order to keep a persistent connection between the Proposal and the invited submissions.

**SOLUTION:** Editors can enter a prefix value, and a start position and format for an incrementing number to be included in the manuscript number for any child submissions linked to the Proposal.

# Persistent Invited Submission Numbering

## Author Invitation Parameters:

Target Publication Date:

Required ▾

Number of Days Author has to Respond to Invitation:

0

Author Submission Due:

(Select a Due Date Calculation Method):

0

- Number of days prior to Submission Target Publication Date:
- Number of days after Author has accepted invitation:

Automatically Un-Invite Authors:

Automatically Promote Alternate Authors:

Invited Submission Manuscript Number Format:

- Automatically Assign Customized Manuscript Number for Invited Submissions  
[Prefix.IncrementingNumber]
  - Include Proposal Manuscript Number [Prefix.ProposalManuscriptNumber.IncrementingNumber]

# Predictive Bibliometrics

A company called Meta<sup>α</sup> has developed a tool that takes a manuscript as input and, using a proprietary algorithm, returns the following information:

- “Predicted Eigenfactor” - likelihood of the paper being cited in the next 3 years
- “Journal Match” score – how closely the submission matches papers already published by the journal

This information allows journal editors to triage the handling of papers based on the predicated success as measured by citation rate and appropriateness of publication by the journal.

[HTTP://WWW.META.COM](http://www.meta.com)



# Predictive Bibliometrics

At configured trigger points, the Author/Editor PDF is sent to the Meta<sup>α</sup> tool. This can also be done manually from the *Technical Check* or *File Inventory* pages.

## Edit Article Type

[intervening configuration options not shown]

- Send Author/Editor PDF when Transfer Complete link is clicked
- Send Author/Editor PDF when New Submission Received
- Send Author/Editor PDF on Tech Check Complete
- Send Author/Editor PDF at First Editor Assignment
- Send Author/Editor PDF when Revised Submission Received

# Predictive Bibliometrics

The tool processes the submission and returns a results score and access to a results PDF.

## Configure Predictive Bibliometrics

You must already have a relationship with the Predictive Bibliometrics provider.

Set threshold values and colors to highlight Predictive Bibliometrics scores that fall below or exceed threshold values.

After configuring these settings, additional configuration is found under each article type for trigger points to perform automatic analysis of the submission.

---

Highlight Article Trajectory Scores that are:

*less than or equal to:*  

*greater than or equal to:*  

Highlight Publication Match Scores that are:

*less than or equal to:*  % 

*greater than or equal to:*  % 

# Predictive Bibliometrics

The results score is displayed in Editor folders and on selected pages in EM. The results PDF is downloadable.

Action	Manuscript Number	Article Type	Section/Category	Article Title
<a href="#">View Submission</a> <a href="#">CrossCheck/iThenticate Results (39%)</a> <a href="#">Predictive Bibliometrics Results (...)</a> <a href="#">Details</a> <a href="#">History</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a>	CAROLINEDEV110-D-14-00001	Original Study		sdfsdf
<a href="#">View Submission</a> <a href="#">CrossCheck/iThenticate Results (39%)</a> <a href="#">Predictive Bibliometrics Results (x)</a> <a href="#">Details</a> <a href="#">History</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a>	CAROLINEDEV110-D-13-00008R1	Original Study		Reviewer and Author view of reviewer attachments
<a href="#">View Submission</a> <a href="#">Predictive Bibliometrics Results (100/25%)</a> <a href="#">Details</a> <a href="#">History</a> <a href="#">Classifications</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Invite Reviewers</a>	CAROLINEDEV101-D-13-00007R1	Original Study		submission with ref checking and AQC

# Version 14.0

**Beta to begin March/April 2017**

**Upgrades July/August 2017**

**TENTATIVE AND SUBJECT TO CHANGE**

# Additional Navigation following Proxy Registration

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 work with that person's People Record (for example, to give them a new Role).

**SOLUTION:** New option allows person doing the proxy registering to immediately view the full user record of that new person.

An Editor or staff wants to quickly Proxy Register several new users. To do this, s/he must navigate to the Proxy Register link after registering each person.

**SOLUTION:** New option allows person to navigate directly to Proxy Register page after completing a registration.

# Additional Navigation following Proxy Registration



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

**Proxy Registration Complete Confirmation**

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

Proxy as: [Author] [Reviewer]

[Editor Main Menu](#)

Two new navigation links will be added to this page:

- View Full User Record
- Proxy Register Another User

# Submit Manuscript User Interface Improvements

**Suggest/Oppose Reviewer UI Redesign** – The *Suggest Reviewers* and *Oppose Reviewers* submission steps will have the style and behavior of the recently modernized *Add/Edit/Remove Authors* and *Funding Information* submission steps.

# Suggest/Oppose Reviewer Redesign

## New Submission

- ✓ Select Article Type
- ✓ Enter Title
- ✓ Add/Edit/Remove Authors
- Funding Information
- Select Section/Category
- Submit Abstract
- Enter Keywords
- ✓ Select Classifications
- Additional Information
- ✓ Enter Comments
- ➔ Suggest Reviewers
- Oppose Reviewers
- Request Editor
- Select Region of Origin
- Attach Files

### Suggest Reviewers

Insert Special Character

Please suggest potential reviewers for this submission.

Use the  
provide  
that the  
the sele



A \* indi

Current A



+ Add A

Open Special Character Palette

<b>Given/First Name*</b>	<input type="text" value="Suzie"/>
Middle Name	<input type="text"/>
<b>Family/Last Name*</b>	<input type="text"/> ⚠
Academic Degree(s)	<input type="text"/>
<b>E-mail Address*</b>	<input type="text"/> ⚠
<b>Institution*</b>	<input type="text"/> ⚠
Department	<input type="text"/> ▾



# Editor Signposting

Traffic lights:

- Editor Reminder Summary Report
- Editor Main Menu To-Do List

Editor Summary Reminder as of Sep 28 2015 2:00AM

**Editor 'To-Do' List**

- ■ New Invitations (2)
- New Assignments (1)
- ■ Submissions with Required Reviews Complete (7)
- ■ Submissions Requiring Additional Reviewers (4)
- ■ Submissions with One or More Late Reviews (2)
- Reviewers Invited - No Response (11)
- ■ Submissions Under Review (14)
- ■ Submissions with Rescinded Decision (14)

**Subordinate Editor's Pending Assignments**

- Group By Editors I Assigned (13)

■ ■ **New Invitations (2)**

Manuscript Number	Article Title	Status	Days since submission	Days at this Status	Accept/Decline
JANETDEV122-D-15-00037	Bubblegum and Soda Pop	Editor Invited	22	19	Accept Invitation Decline Invitation
JANETDEV122-D-15-00071	Caffeinated Soda - Good or Bad for You?	Editor Invited	2	1	Accept Invitation Decline Invitation

*(Part of report omitted)*

■ **Submissions with One or More Late Reviews (2)**

Manuscript Number	Article Title	Status	Review Status	Days since submission	Days at this Status
JANETDEV122-D-15-00043	Snowbanks	Under Peer Review	1 Agreed 1 Late (# of Req'd Reviews: 3)	39	3
JANETDEV122-D-15-00020	Autumn Structures	Required Reviews Complete	2 Complete 1 Late (# of Req'd Reviews: 3)	61	11

*(Part of report omitted)*

■ **Group By Editors I Assigned (13)**

Subordinate Editor	Manuscript Number	Article Title	Status	Review Status		Days since submission	Days at this Status
Ed Browdy	JANETDEV122-D-15-00031	Norwegian Winters	With Editor	1 Agreed 1 Late (# of Req'd Reviews: 2)	Send E-mail	30	25
Frank McDougall	JANETDEV122-D-15-00056	Aces, Deuces, Treys	Reviewers Assigned	2 Agreed (# of Req'd Reviews: 3)	Send E-mail	10	5

## Associate Editor Main Menu

### Submissions With:

0 Reviews Complete  
1

1 Review Complete  
0


2 Reviews Complete  
0

3 Reviews Complete  
0


4+ Reviews Complete  
0

### Editor 'To-Do' List

Direct-to-Editor New Submissions (0)

 Incomplete Submissions (1)

New Invitations (0)


 New Assignments (1)

Submissions with Required Reviews Complete (1)

 Mine (1)


Returned to Me (0)

 Submissions Requiring Additional Reviewers (17)

 Submissions with One or More Late Reviews (7)

Reviewers Invited - No Response (0)

All Submissions with Editor's Decision (1)

 Notified (1)

 Require Notification (8)

### Submissions in Process

Submissions with Active Discussions (12)

Submissions Under Review (9)

### View All Assigned

[View All Assigned Submissions \(12\)](#)

## Incomplete Submissions - Boulder Moapa

**Contents:** This page includes: 1) PDF build failures, 2) Submissions you have started editing, but did not finish (i.e., you did not rebuild the PDF after editing the submission).

Page: 1 of 1 (1 total submissions)

Display 10 results per page.

	Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Edit Submission Status Date	Edit Submission Status
	<a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Revert Submission</a> <a href="#">Send E-mail</a>	INFORM-2009-44	Original Study	Visual Information Design	Utilizing taxonomical structure to identify missing information	Garnet Shaw	May 20, 2014	Oct 16, 2014	With Editor	Oct 16, 2014	Incomplete with Editor

Page: 1 of 1 (1 total submissions)

Display 10 results per page.

## Warning Indicator Configuration

For each of the Editorial folders below, you may set the number of days beyond the indicated criterion that a submission in that folder should be considered in an "overdue" state, and a number of days at which the submission will enter the "warning" state. These settings will control the colored bars on the main menu for editors using a layout that includes these indicators.

### Editorial Submissions in Progress

**Warning:**  days since submission began

**Overdue:**  days since submission began

### Transferred Submissions

**Warning:**  days since initial date submitted

**Overdue:**  days since initial date submitted

### New Submissions

**Warning:**  days since initial date submitted

**Overdue:**  days since initial date submitted

### Revised Submissions

**Warning:**  days since the revision was received

**Overdue:**  days since the revision was received

# Editor's Decision Folder Improvement

In the *All Submissions with Editor's Decision* folder there are two submission states mixed together:

- Decision complete, Author has NOT been notified
- Decision complete, Author has been notified

Editors that have the permission to send Decision Letters can be confused when working in this folder.

**SOLUTION:** A new sortable column is added to the folder with a status reflecting whether or not the Author has been notified.

# Editor's Decision Folder Improvement

Quicklinks

All Submissions

Page: 1 of 1 (7 total submissions)

25 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Editor Name	Editor Decision	Author Notified Date
<ul style="list-style-type: none"> <li>View Submission Details</li> <li>History</li> <li>Unassign Editor</li> <li>File Inventory</li> <li>Edit Submission</li> <li>Solicit Commentary</li> <li>Assign Editor</li> <li>Notify Author</li> <li>Set Final Disposition</li> <li>View Reviews and Comments</li> <li>Rescind Decision</li> <li>Similar Articles in MEDLINE</li> <li>Send E-mail</li> </ul>	CAROLINEDEV10 D-13-00006	Original Study		this is my title	or, MD	Major Revision	Notify Author
<ul style="list-style-type: none"> <li>View Submission Details</li> <li>History</li> <li>File Inventory</li> <li>Edit Submission</li> <li>Solicit Commentary</li> <li>Set Final Disposition</li> <li>Initiate Production</li> <li>View Reviews and Comments</li> <li>Similar Articles in MEDLINE</li> <li>Send E-mail</li> </ul>	CAROLINETEST4 D-05-00041R1	Original Study		Submitting a new MS the editor deep link	or, MD	Accept	Jul 13 2006 8:41AM

25 results per page.

Current Status	Editor Name	Editor Decision	Author Notified Date
Exec. Editor Complete	Ed J Editor, MD	Major Revision	Notify Author
Accept	Ed J Editor, MD	Accept	Jul 13 2006 8:41AM

# Invited Authors Column

When working with invited submissions, users can see information such as the number of authors invited, accepting, and declining, but there is no information on who those authors are.

**SOLUTION:** A new “Invited Authors” column is added to each of the three folders in the Proposals with Invitations in Progress group.

Each author that has been invited will be listed, with their name serving as a link to the People Information popup for that author.

# Invited Authors Column

**Proposals with Outstanding Invitations - Ed Ed Garcia, M.D.**

**Contents:** Proposals where one or more Authors have neither accepted nor declined or Un-invite Authors by clicking Invite Authors; 2) Allow current Authors to complete t

Page: 1 of 1 (3 total proposals)

1) View the status of Authors Invited, Invite additional Authors  
e sort order.

results per page.

# of Author Submissions	Invited Authors	Initial Date Authors Invited	Status
1	Sam Jackson, MD; Jack Johnson; Donna Kenney, MD	Nov 18, 2015	Nov 18, 2015
0	Joe Bloom, MD	Apr 20, 2016	Apr 20, 2016
1	Suzy Smith, MD; Vin Harkins, MD	Oct 14, 2015	Oct 14, 2015

Action	Proposal Manuscript Number	Proposal Article Type	Proposal Title	Section Category	# of Author Submissions	Invited Authors	Initial Date Authors Invited	Status Date	Current Status
<a href="#">View Proposal Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Edit Proposal</a> <a href="#">Invite Authors</a> <a href="#">View Related Submissions</a> <a href="#">Set Final Disposition</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">AuthorMapper Author Search</a>	STACEYDEV130-D-15-00003	Proposal	caroline testing for 13.0-30		1	Sam Jackson, MD; Jack Johnson; Donna Kenney, MD	Nov 18, 2015	Nov 18, 2015	Received by Editor
<a href="#">Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Edit Proposal</a> <a href="#">Invite Authors</a> <a href="#">Set Final Disposition</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">AuthorMapper Author Search</a>	STACEYTEST73-D-09-00005	Proposal	Testing Discussion functionality for proposals		0	Joe Bloom, MD	Apr 20, 2016	Apr 20, 2016	Author Invited
<a href="#">Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Edit Proposal</a> <a href="#">Invite Authors</a> <a href="#">View Related Submissions</a> <a href="#">Set Final Disposition</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">AuthorMapper Author Search</a>	STACEYTEST70-D-08-00009	Proposal	Testing 7.0-05		1	Suzy Smith, MD; Vin Harkins, MD	Oct 14, 2015	Oct 14, 2015	Received by Editor



# BITS

Two new Production Task Export methods that use the BITS (Book Interchange Tag Suite) DTD

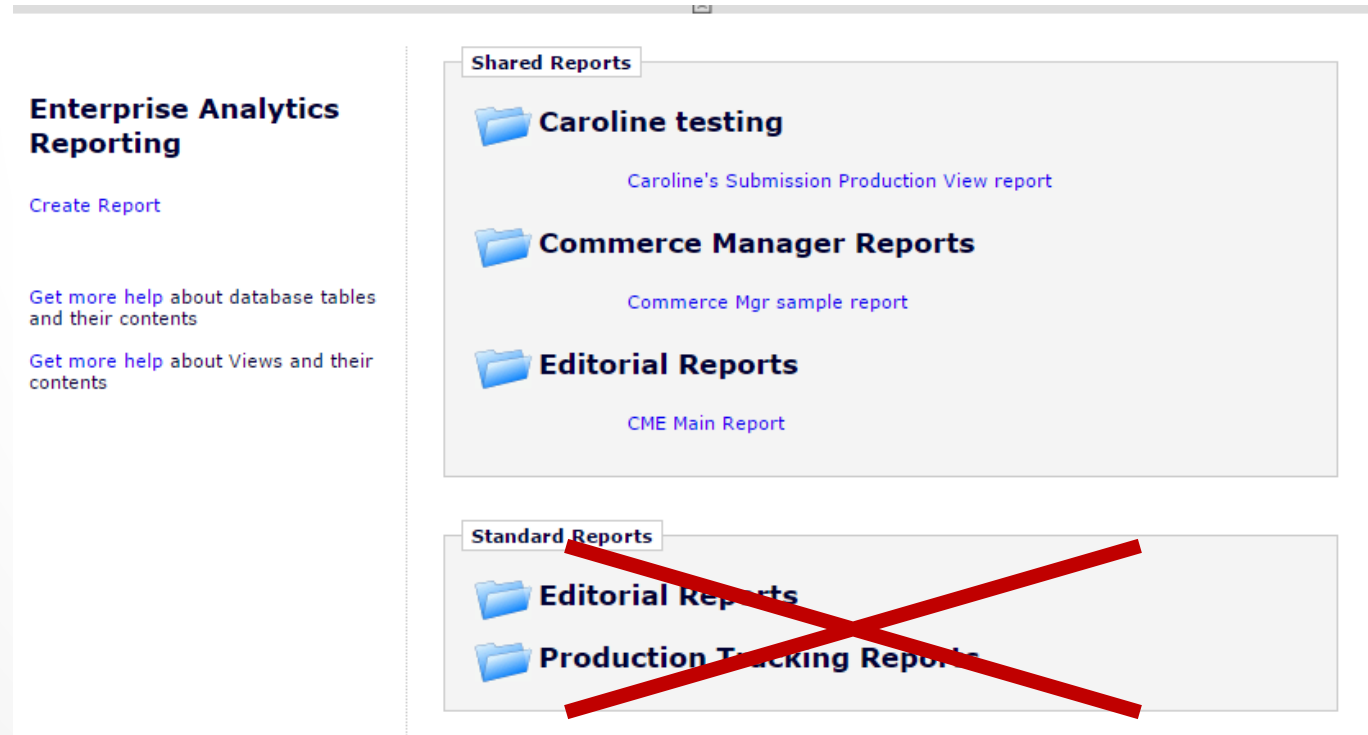
- Submission Production Task Export
- Schedule Group Production Task Export

BITS is based on the JATS Archiving DTD already available in EM/PM

# Suppress EAR Standard Reports

Some publications construct specific reports for users, and they don't want those users distracted by, or accessing, some of the EM/PM pre-constructed "Standard Reports".

**SOLUTION:** Publications will be able to suppress the "Standard Reports" in the Enterprise Analytics Report (EAR) menu.



# Global ID for Transferred Submissions

As cascading (transfer) workflows become more strategically important to publishers, there is a growing need to track and report on manuscripts as they travel from publication to publication.

**SOLUTION:** A “Global Manuscript ID” will be available so that a paper can be tracked.

The format of a Global MS ID will be “EM” + Journal Acronym + Unique Document ID

# Global ID for Transferred Submissions

## **Paper submitted by Author:**

Global MS ID assigned when the paper is submitted

## **Paper transferred from one EM site to another EM site:**

Global MS ID that was automatically assigned when paper was first submitted to the sending site is used on receiving publication

## **Paper transferred from an EM site to a non-EM site:**

Global MS ID assigned when paper was first submitted to sending site is used to populate Global MS ID in XML file sent to FTP site.

## **Paper imported from non-EM site to EM site using “JATS Manuscript Import”:**

Global MS ID automatically assigned using acronym for the site that receives paper from the non-EM site as prefix of the Global MS ID.

## **Paper manually submitted from a non-EM site to an EM site.**

Global MS ID acronym can be entered/edited manually.

## **Paper entered in PM using Create Submission Interface:**

Global MS ID automatically assigned using prefix of the site created in, but may be edited by an Editor with permission.

# Email Auto-fill

Editors have the ability to enter email addresses on some Ad Hoc letters sent from the system. It is never easy to remember everyone's email addresses. It would be useful if the system would remember the email addresses that an Editor's most frequently uses.

**SOLUTION:** A personalized email picklist will be added to Ad Hoc from Editor letters when those letter templates are configured to allow free form email entry.

# Email Auto-fill

The picklist will be Editor-specific. Each Editor will have a personalized list that is built over time.

Auto-complete technology will be used to automatically display email addresses as the Editor types into the email entry box.

The system will remember emails that are used previously and offer those emails during the auto-fill process.

Email addresses used most frequently will appear at the top of the list.

Email addresses do not have to be tied to People Records, but if they are, then the system will also add the first and last names to the entry in the picklist.

The function can be disabled.

# Closing Observation

Aries has, and will continue to, build an “operating system” for scholarly publishing. This involves:

- Extensive integration with other systems enabled by emerging standards
- Making significant financial annual investments
- Promoting an organizational culture that supports innovation
- Promoting productive and creative feedback loop with users and customers

# Thank You!

**Tony Alves, Director of Product Management**

[talves@ariessys.com](mailto:talves@ariessys.com)





# FEATURE WORKSHOP!

1. How do you think EM can be improved from the editor's perspective?
2. How do you think EM can be improved from the author's perspective?
3. How do you think EM can be improved from the reviewer's perspective?