

**CONFIDENTIAL AND PROPRIETARY**

# Release Notification

 **Editorial Manager<sup>®</sup>**

 **ProduXion Manager<sup>®</sup>**

 **Commerce Manager<sup>™</sup>**

**Editorial Manager/ProduXion Manager**

**12.1 General Release Notification**

**09/15/15**

**Draft – Subject to Change**

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## Document Change Log

Date	Version	Change
06/25/2015	Beta Release	Beta version
07/17/2015	Gamma Release	Gamma version *Corrected 'Assign Editor Chain' RoleManager description
09/15/2015	General Release	General Release version

## Editorial Manager/ProduXion Manager 12.1 General Release Notification

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# GENERAL ENHANCEMENTS

## Increased Password Security

In EM/PM version 12.0, a variety of password security options are available to publications that wish to safeguard against fraudulent activities. Password Profiles may be configured to impose minimum password length, require alpha-numeric characters, lock the user account after failed login attempts, and more. Proxy restrictions may be enabled to create limitations on what administrators can view and edit on other user's accounts. Passwords can be encrypted within EM (blinded to users) and an additional setting may require users to select a security question. A user may be forced to reset their password after requesting forgotten access credentials. Most of these security options are managed by Aries Account Coordinators.

New in EM/PM version 12.1, a new supplemental 'High Security' password policy will be automatically enabled upon upgrade. Publications that wish to opt out of the new policy must sign a waiver to continue using less stringent password security settings ('Low Security').

With the new High Security password policy:

- ✚ 'Reset Password Before Sending' is enabled on the 'Configure Send Username or Password Options' page in *PolicyManager* and cannot be changed by the System Administrator. This means that a user's password is always reset for password recovery.
- ✚ The temporary password generated for password recovery expires after 4 hours. The expiration time cannot be changed by the System Administrator.
- ✚ The password generated for new/proxy registrations has a default expiration of 120 hours (5 days). The System Administrator may change the expiration period, or disable this setting entirely.
- ✚ For new or proxy registrations, plain text passwords are shown in letters using the %PASSWORD% and %BLINDED\_PASSWORD% merge fields.
- ✚ All other letters using the %PASSWORD% and %BLINDED\_PASSWORD% merge fields will display a hyperlink that will direct the user to 'Account Finder' page. From there, the user may either login or request a temporary password.
- ✚ All other letters using the %BLINDED\_PASSWORD% merge field will display the text "Your pass word is:" before displaying the hyperlink to the 'Account Finder' page.
- ✚ Password encryption is enabled that masks all passwords within the EM interface.

All publications are able to edit the new expiration setting for passwords generated for new user registrations and proxy registrations on the 'Configure Send Username or Password Option' page regardless of the security setting. Only publications opting for the Low Security policy will be able to edit the expiration time for temporary passwords generated for password recovery if 'Reset password before sending' is enabled.

*Sample Configure Send Username or Password Options page – security policy enabled*

## Configure Send Username or Password Options

Users attempting to login to the system may forget their Username and/or Password.

- If 'Send Access Credentials' is selected, there is an action link displayed on the Login page entitled 'Send Access Credentials'. If the user forgot their Username and/or Password, they would click this link, and enter First Name, Last Name, and E-mail Address. If the system finds a match, the person's Username and Password will be e-mailed to the E-mail Address in the system.
- If 'Send Password Only' is enabled the user will be provided with only their Password when clicking the 'Send Access Credentials' link on the Login page. If the user forgot their Password, he would click this link, and enter Username and E-mail Address. If the system finds a match, the person's Password will be e-mailed to the E-mail Address in the system. If the user forgot both the Username and Password, they must contact customer support outside of the system.

- Send Access Credentials  
 Send Password Only

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

Reset password before sending

If the password is reset before sending, you may also configure an expiration policy. If the login attempt is pre-expiration, the user is required to change his password the first time he logs in successfully using the temporary password. If the login attempt is post-expiration, the user must initiate the password recovery function (click [Send Access Credentials](#) or [Send password](#))

Password generated for password recovery expires after  hours

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

Password generated for new user registrations and proxy registrations expires after  hours

Cancel

Submit

TO CONFIGURE:

Please contact your Aries Account Coordinator to get more information about the new security policies, or if your publication wishes to opt out of High Security settings.

## Assign Editor Chain

In EM version 12.0, Editors are assigned on an individual basis. One Editor assigns responsibility for the submission on to another Editor; that Editor may in turn assign responsibility on to another Editor, and in this manner an Editor ‘Decision Chain’ is built up. Once Editors begin to submit their recommendations, the submission automatically moves back up the ‘Decision Chain’ of Editors in the reverse order of assignment. Many publications would instead like one person to be responsible for setting up the decision chain, and having to proxy in for each Editor in turn to move the submission on to the next Editor can be time consuming under current functionality.

New in EM version 12.1, publication staff may assign an entire Editor chain in one action. Administrators can create Editor chain templates that define the default number of assignments in the chain, the default Editor Roles that are eligible for each place in the chain, and the default Assignment Letter for each Editor in the chain. Article types can then be configured to use specific Assignment Chain Templates. When it comes to the point where an Editor assigns the first Editor on a newly received submission (or Revision), the user is presented with the proposed chain for the submission’s Article Type. From there, the Editor may select individual Editors to receive the Assignment, add steps to the chain, remove steps from the chain, change the Editor Role and Assignment letter for each step in the chain, and customize or preview the Assignment Letter.

NOTE: The Assign Editor Chain feature will only generate an Invitation for the last Editor in the Chain, where that Editor’s Role configured to receive assignments as invitations; all mid-chain Editors are Assigned without an Invitation step. Additionally, publications using the Suggest Editor feature (i.e. invited Editor Queues) will not be presented with the Assign Editor Chain page.

NOTE: Assign Editor Chain is only available for New Submissions or New Revisions. An Editor Chain may not be assigned if the submission has already been assigned to a single Editor.

NOTE: Assign Editor Chain does not affect Direct-to-Editor workflows.

### Sample initial Assign Editor Chain page

**Assign Editor Chain**

Title: APC GO

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

Assign Individual Editor

Step	Role	Editor	Assignment Letter
Editor 1	Managing Editor		Editor Assignment
Editor 2	Editor		Editor Assignment
Editor 3	Editor		Editor Assignment
Editor 4	Editor		None

Cancel Create Chain and Send Letters

After Editor Chain templates are created and linked to the desired Article Types, the user will be presented with the Assign Editor Chain when the ‘Assign Editor’ action link is clicked from

either the ‘New Submissions Requiring Assignment’ or ‘Revised Submissions Requiring Assignment’ folders. At this point, the user will need to select specific Editors within the Editor Roles suggested for each step of the chain. Selecting the individual Editors for each step of the chain may be done by selecting the intended Editor from a drop down list. Users may also start typing an Editor’s name into the Editor field and the drop down list will narrow the results to matching names within the Editor Role.

NOTE: If there is only one appropriate editor for a specific step – for example, if there is only one Editor-in-Chief – then that person will be selected automatically.

At this stage, Editors may also add steps to the Editor Chain using the ‘Add to Chain’ button with the selected Editor Role, remove a step from the chain using the trash can icon, switch the Assignment Letter, customize the Assignment Letter, change the Editor Role for any step in the chain, or forgo the Editor Chain assignment to assign or Invite a single Editor via the ‘Assign Individual Editor’ button.

*Sample Assign Editor Chain page displaying matches to text entered into the Editor field*

Publications can switch from using a drop-down to select an Editor for a particular Role to using a standard EM Search Editor UI instead – this is done by enabling the ‘Use Search-based selection for Editor Chain Assignment’ for the Role that appears in the Assign Editor Chain page.

NOTE: Users for publications with a large number of users assigned to a specific Editor Role may see the ‘Editor Search’ link in lieu of the text entry box and drop down list even without the new *RoleManager* ‘Always Use Search-based selection for Editor Chain Assignment (i.e. if not Applied Automatically by System)’ setting enabled for that Role.

NOTE: This setting is therefore not a ‘permission’ allowing that Role to do something in Editorial Manager; it is a new type of setting that controls how that Role is searched *for* in this part of the system.

*Sample Assign Editor Chain page with ‘Editor Search’ link*

### Assign Editor Chain

**Title:** APC 123

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

[Assign Individual Editor](#)

**Define Initial Editor Assignment Chain**

	Step	Role	Editor	Assignment Letter
🗑	Editor 1	Managing Editor ▼	Editor Search	Editor Assignment ▼ <a href="#">Customize</a>
🗑	Editor 2	Editor ▼		Editor Assignment ▼ <a href="#">Customize</a>
🗑	Editor 3	Editor ▼		Editor Assignment ▼ <a href="#">Customize</a>
🗑	Editor 4	Editor ▼		None ▼ <a href="#">Customize</a>

Editor ▼ [Add to Chain](#)

[Cancel](#) [Create Chain and Send Letters](#)

### Sample Assign Editor Chain: Search page

### Assign Editor Chain: Search

**Title:** APC 123

Use the search tool to identify the most appropriate person for this step in the chain.

**Editor 1:** Managing Editor

Click the Blind Editors link to block access to this submission for one or more Editors.  
[Blind Editors](#)

[Insert Special Character](#) [Cancel](#) [Value Options](#)

(	Criterion	Is/Is not	Selector	Value	)		
▼	Editor Role ▼	is ▼	Equal To ▼	Managing Editor ▼	▼	AND ▼	<a href="#">Remove</a>
▼	Last Name ▼	is ▼	Begins With ▼	<input style="width: 100%;" type="text"/>	▼		<a href="#">Remove</a>
							<a href="#">Add</a>

[Clear](#) [Search](#)

Publications that allow reassignment of previous Editors for Revisions will still display the existing Reassign Editor Chain interface for incoming Revisions, as a default. Editors will now also have the option to edit the previously assigned chain using the Assign Editor Chain interface ('Edit Chain' button) or create an entirely new one ('Create a New Chain' button) from the applicable Template. Additionally, Editors may still elect to use the traditional single Assign Editor functionality for Revisions with the existing 'Assign Individual Editor' button.

### Sample Reassign Editor page with new Editor Chain options

Editorial Manager
 Produxion Manager
 Commerce Manager

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**Reassign Editors**

**Manuscript Number:**  
Kristin59R1

**Title:** Pub Med Merge Only 1a

The Editors listed were assigned to the previous version of this submission in the order indicated. To reassign the previous Editors in the same order, use one of the 'Reassign...' buttons. The submission will be automatically assigned to each editor in succession, and the last assigned Editor of the previous version will then be responsible for the submission.

Use 'Edit this/selected Chain' to first change these assignments; use 'Create a New Chain' for a new Chain as configured for this Article Type; use 'Assign Individual Editor' to set up just the first assignment.

Assignment Order	Editor Name	Editor Role	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
Editor 1	Thurston Moore, Ph.F	Editor	31	0		Yes

NOTE: Publications configured to directly assign Revisions to the first assigned Editor will not see the 'Assign Editor Chain' interface for incoming Revisions. After the Editor Chain has been finalized, clicking the 'Create Chain and Send Letters' button assigns the submission to all Editors in the chain along with the selected Assignment Letters.

**TO CONFIGURE:**


Publications must first create Editor Chain templates to use the 'Assign Editor Chain' functionality with new or revised submissions. In *PolicyManager*, clicking the 'Define Editor Assignment Chain Templates' link will bring the user to the new Define Editor Assignment Chain Templates page.

## PolicyManager Main Menu

---

[Expand All](#)

[Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊕ **Submission Policies**
- ⊕ **Questionnaire Policies**
- ⊕ **Additional Data Policies**
- ⊖ **Editor Assignment Policies**
  - [Set Editor Assignment Options](#)
  - [Define Editor Assignment Chain Templates](#)
  - [Set Editor Rotation Participants](#)
  - [Configure Automated Summary Reminders](#)
  
- ⊕ **Reviewer and Editor Form Policies**
- ⊕ **E-mail and Letter Policies**
- ⊕ **General Policies**
- ⊕ **Discussion Forums**
- ⊕ **Linked Submissions Policies**
- ⊕ **Conference Submission Policies**
- ⊕ **Transmittal Policies**
- ⊕  **ProduXion Manager**

*Sample Define Editor Assignment Chain Templates page*

## Define Editor Assignment Chain Templates

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

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

⋮	🔗	<b>Original Study Temp</b>
⋮	🔗 🗑️	<b>Letter to Editor Chain</b>

+ Add Another Editor Assignment Chain Template

Close

[Edit Article Types](#)

To create a new template, click ‘+ Add Another Editor Assignment Chain Template’:

### Define Editor Assignment Chain Templates

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

**Current Editor Assignment Chain Template List**

- Original Study Temp
- Letter to Editor Chain

+ Add Another Editor Assignment Chain Template

#### Enter Editor Assignment Chain Template Details

Open Special Character Palette

**Description\***

Role	Assignment Letter
⋮ 🗑️ Editor in Chief	<input type="text" value="Editor Assignment"/>

Each template is a sequence of Editor Roles, with associated Assignment letter template. Only Editor Roles with the ‘Receive Assignments’ permission can be selected for inclusion in a Template.

In the ‘Enter Editor Assignment Chain Template Details’ window, enter a template description. Select an Editor Role from the drop down list at the bottom of the window and click the ‘Add to Chain’ button to create a new step in the Editor Chain. Select a default Assignment Letter at this point, or leave blank if notification of editors is not necessary, for example when they are in the

middle of the chain and can currently do nothing until later editors submit a decision. When multiple steps have been added to the chain, the order may be rearranged by dragging and dropping the step to the desired location within the chain. Note that the system will warn you if you put an Editor Role in the wrong position – an editor in the middle of the chain must have the ‘Assign Editor’ permission.

TIP: You can complete partial assignment chains – for example, if your chain is normally Editor-in-Chief→Section Editor→Associate Editor, you can create a template to get the submission to the Section Editor; the Section Editor then sees this as any other assignment and then chooses the AE they want.

TIP: Or, if you have only one Editor-in-Chief, creating a template consisting of just that Role will automatically select them for assignment; this simplifies assigning that first Editor in the chain.

After an Editor Assignment Chain Template has been created, it will need to be linked to an Article Type. In ‘Edit Article Types’, Edit the desired Article Type and scroll to the ‘Editor Parameters’ section of the page:

Automatically Promote Alternate Authors:	<input type="checkbox"/>	<i>If this box is selected, Alternate invited Authors will automatically be promoted to invited Authors by the system when the primary invited Author(s) are un-invited or decline the invitation</i>
<b>Editor Parameters</b>	<b>New and Revised Submissions</b>	
Editor Assignment Chain Template:	Original Study Temp ▼	<i>Select an Assignment Chain Template to allow the entire Editor Chain to be assigned in one action, not just the first Editor.</i>
<b>Reviewer Parameters:</b>	<b>New and Revised Submissions</b>	
Submissions will move to the ‘Submissions with Required Reviews Complete’ folder as soon as this number of reviews have been completed.	<input type="text" value="2"/>	<i>Must be 0 or greater.</i>
Number of Days Reviewer has to Respond to Invitation:	<input type="text" value="0"/>	<i>Set this value to zero to turn off the automatic un-invitation process for all Reviewers who have not responded to an invitation.</i>
Automatically Un-assign Reviewers n days after ‘Date Review Due’	<input type="text" value="0"/>	<i>Set this value to zero to turn off the automatic un-assign process for all Reviewers who have accepted an invitation but not submitted a review on time.</i>
Automatically Un-assign late Reviewers with partial review saved.	<input type="checkbox"/>	<i>Select this box to automatically un-assign late Reviewers even if they have a partial review saved.</i>
Automatically Promote Alternate Reviewers:	<input checked="" type="checkbox"/>	<i>Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines, is un-invited, or un-assigned.</i>
<input checked="" type="radio"/> Continue promoting Alternates until there are no more		

NOTE: Once an Editor Assignment Chain Template has been associated with an Article Type, it cannot be removed on the ‘Define Editor Assignment Chain Templates’ page.

The user will be able to select the appropriate template from the drop down list containing all configured templates.

A new Editor *RoleManager* setting is available that controls whether the ‘Editor Search’ link will be used for selecting such Editors on the Assign Editor Chain page. When ‘Always Use Search-based selection for Editor Chain Assignment (i.e. if not Applied Automatically by System)’, the user will be directed to the ‘Assign Editor: Search’ interface to search and select individual Editors with this Role.

NOTE: If the publication has a Role with a lot of Editors assigned to it, this setting may be imposed by the system automatically for that Role on the Assign Editor Chain page.

*Partial Editor RoleManager page*

## Edit Role Definition

Role Name:\*

*Maximum Role name is 40 characters.*

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

[Expand All](#)   [Collapse All](#)

### New Submissions

- Receive New Submissions in 'New Submissions Requiring Assignment' Folder
  - Perform Technical Check (submission received in 'New Submissions' Folder)
- Receive New Transferred Submissions in 'Transferred Submissions' Folder
- Submit Manuscript as an Editor
  - Restrict to 'Editor/Publisher Use Only' Article Types
  - Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types

### Editor Assignment

- Receive Assignments in 'New Assignments' Folder
  - Receive Assignments without Invitation
  - Receive Invitations for Assignments
- Always Use Search-based selection for Editor Chain Assignment (i.e. if not Applied Automatically by System)
- Assign Editor
- Redirect to Other Editor (and be removed from Editor Chain)
- Change Corresponding Editor

## Detailed People Notes

In EM/PM version 12.0 each People record has a text field called People Notes, in which users can enter additional information and details about that person. Editors with the appropriate permissions may view/edit the text in this field.

New in EM/PM version 12.1, a new Detailed People Notes field is added that timestamps each note as well as records the user who added the note and the publication on which the note is saved. A publication in a Portal-Shared group may elect to share these new Detailed People Notes with one or more other publications within the group. The Detailed People Notes field may be managed on the 'Search People – Update Information' page and notes may also be added during Proxy Registration.

For reporting, Detailed People Notes are added to all Custom Report views, Enterprise Analytics Reporting Views, and Cross-Publication Enterprise Analytics Reporting views that currently contain the existing People Notes field.

NOTE: The new Detailed People Notes field is completely separate from the existing People Notes field.

Sample Detailed People Notes section of the Search People – Update Information page (partial)

**Detailed People Notes**

**Add New Note:** 

Character Count: 0 / 4000

Operator ▲▼	Note	Date ▲▼	Action
Thurston Moore, Ph.F	I knew it looked familiar!	Jun 25 2015 05:40:52:463AM	
Mary Shelby Roman	Hey, the Detailed People Notes display much like the EM Discussion interface.	Jun 25 2015 05:39:47:620AM	

Display this section at the top of this page

**People Notes**

Editors with ‘View Detailed People Notes’ permission in *RoleManager* can view the Detailed People Notes created by other users on their publication.

Editors with ‘Manage Detailed People Notes’ permission in *RoleManager* can view, add, or remove notes created by other users on their publication.

NOTE: Detailed People Notes cannot be edited. Users with ‘Manage Detailed People Notes’ will be able to make corrections by removing and adding notes.

Portal-linked publications sharing Detailed People Notes require separate *RoleManager* permissions: ‘View Portal-Shared Detailed People Notes’ permission allows an Editor to view Detailed People Notes created by users on their local publication, and also any notes created by users on other publications and shared with their local publication. ‘Manage Portal-Shared Detailed People Notes’ permission allows an Editor to view, add, and remove Detailed People Notes created by users on their local publication, and also any notes created by users on other publications and shared with their local publication.

Detailed People Notes displayed on Portal-linked publications provide information about the publication on which the note was created and the option to filter the display of the notes by the originating publication.

*Sample Detailed People Notes section of the Search People – Update Information page on a Portal-linked publication*

**Detailed People Notes**

**Add New Note:** i

Character Count: 0 / 4000

Filter By: All Publications ▼

Publication ▲ ▼	Operator ▲ ▼	Note	Date ▲ ▼	Action ▲
IJRSDEV121c	Suzie Snowflake	As President of the Jeff Fan Club (Official), I offer a counterpoint: JEFF IS <a href="#">(more...)</a>	Jun 25 2015 05:38AM	🗑
IJRSDEV121b	Luke G. Shepherd, MD	He's just a mediocre guy, living his life.	Jun 25 2015 05:33AM	🗑
IJRSDEV121a	Mary A. Managing	Jeff kind of knows what he's doing.	Jun 25 2015 05:29AM	🗑

Display this section at the top of this page

Detailed People Notes can be used as a search criterion from the Search People, Search for Authors, and Search for Reviewers interfaces.



## Sample Search People page

### Search People

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
Detailed People Notes ▼	Begins With ▼	<input type="text"/>	ALL ▼ END ▼
Last Name	Begins With ▼	<input type="text"/>	END ▼
First Name	Begins With ▼	<input type="text"/>	
Institution	Begins With ▼	<input type="text"/>	
City			
State			
Country			
E-mail Address			
Phone Number			
Personal Classifications			
Personal Keywords			
People Notes			
Detailed People Notes			
Registration Date			
Proxy Registration			

[Editor Main Menu](#)  
[Production Tasks Menu](#)

NOTE: Performing a Search for Reviewers using the Detailed People Notes criterion requires additional permission in the 'Reviewer Search Criterion' section of Editor *RoleManger*.

### TO CONFIGURE (SINGLE PUBLICATION):

For single publications, configuring access to Detailed People Notes is done in Editor *RoleManger*.

'View Detailed People Notes' allows the user to see the Detailed People Notes on the *Search People – Update Information* and *People Information/Activity Details* pages.

'Manage Detailed People Notes' allows the user to view, add, and remove notes on the *Search People – Update Information* and *People Information/Activity Details* pages. Editors with this permission will also be able to add Detailed People Notes during Proxy Registration.

Sample Editor RoleManager

- Viewing and Editing People Data
  - Search People
    - View/Change Username and Password
    - Send Username and Password
    - Change E-mail Address
    - Change Preferred Method of Contact
    - Change Editor Role Designation to/from : 

Editor	▲
Editor in Chief	
New Editor of Course	
Test For Brenda	
XO	▼
  - Inactivate Users
  - Merge Duplicate Users
  - View People Activity Details
  - View Additional People Details
    - Edit Additional People Details
  - View People Notes
  - Edit People Notes
  - View Detailed People Notes
  - Manage Detailed People Notes
  - View Portal-Shared Detailed People Notes
  - Manage Portal-Shared Detailed People Notes
  - View People URLs
  - Edit People URLs

## TO CONFIGURE (PORTAL-LINKED PUBLICATIONS):

Portal-linked publication policies are configured in the ‘Share People’ section of *AdminManager*:

### Share People

- [Define People Sharing Group](#)
- [Define Reviewer Sharing Partners](#)
- [Set Inactivation and Merging Policies](#)
- [View Duplicate E-mail Policies](#)
- [Set Detailed People Notes Sharing Policy](#)
- [Configure Group Notifications](#)

---

Journals within the same publishing organization can establish cooperative relationships with other journals for the purposes of establishing a single login across all journals in the group. This is configured on the [Define People Sharing Group](#) page.

Once the sharing relationship(s) is confirmed, journals then have the option of sharing their Reviewer data with one or more of those journals, on the [Define Reviewer Sharing Partners](#) page. Journals are not required to participate in Reviewer Data sharing, even if a confirmed people sharing relationship exists.

Journals in the group must then agree on a policy for making users inactive and merging duplicate people records. Specifically, journals must determine whether people records made inactive/merged on one journal should also be made inactive/merged on all the other journals in the group, or whether the action should take place on that journal only. This configuration is performed on the [Set Inactivation and Merging Policies](#) page.

Journals in the group should agree on a policy for allowing duplicate e-mails to be used when existing records are edited, as such changes normally propagate throughout the group. Each journal has its own Duplicate E-Mail Policy set in PolicyManager but the checks carried out for duplicate e-mails also take into consideration people records and settings from other publications in the group.

To share Detailed People Notes with other publications in a Portal-linked group, the ‘Share Detailed People Notes with other journals’ checkbox must be selected on the ‘Set Detailed People Notes Sharing Policy’.

### Set Detailed People Notes Sharing Policy

To share Detailed People Notes with other journals that have also selected to share Detailed People Notes, click the checkbox for ‘Share Detailed People Notes with other journals’. You may select this option at any time. Your journal will synchronize your Detailed People Notes with all the other journals that are sharing notes.

You may deselect this option at any time to stop sharing Detailed People Notes. If you do, your journal will retain all the previously shared Detailed People Notes, but will not share any further changes to Detailed People Notes with other journals from that point on. If you do not wish to retain the notes shared from other journals, you may manually remove them from each user’s personal record.

Share Detailed People Notes with other journals

- [Define People Sharing Group](#)
- [Define Reviewer Sharing Partners](#)
- [Set Inactivation and Merging Policies](#)
- [View Duplicate E-mail Policies](#)
- [Configure Group Notifications](#)
- [AdminManager Menu](#)

New permissions are added in Editor *RoleManager* to allow viewing and managing of Detailed People Notes:

‘View Portal-Shared Detailed People Notes’ permission allows the Editor to view Detailed People Notes on their local publication as well as any notes created by users on other publications and shared with their local publication.

‘Manage Portal-Shared Detailed People Notes’ permission allows the Editor to view, add, and remove Detailed People Notes created by users on their local publication, and also any notes created by users on other publications and shared with their local publication.

Sample Editor RoleManager page (partial)

Viewing and Editing People Data

- Search People
  - View/Change Username and Password
  - Send Username and Password
  - Change E-mail Address
  - Change Preferred Method of Contact
  - Change Editor Role Designation to/from : 

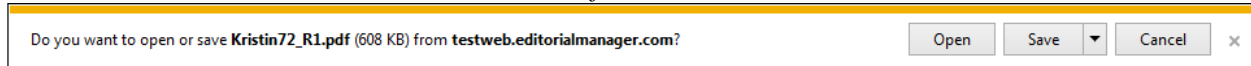
Editor	▲
Editor in Chief	
New Editor of Course	
Test For Brenda	
XO	▼
- Inactivate Users
- Merge Duplicate Users
- View People Activity Details
- View Additional People Details
  - Edit Additional People Details
- View People Notes
- Edit People Notes
- View Detailed People Notes
- Manage Detailed People Notes
- View Portal-Shared Detailed People Notes
- Manage Portal-Shared Detailed People Notes
- View People URLs
- Edit People URLs

## Include Revision Number in PDF Filenames

In EM version 12.0, clicking the 'View Submission' link brings the user to a page where they can select a version of the submission to download. The filename is the same regardless of the revision number.

New in EM version 12.1, the revision number is appended to submission PDF filenames so it is easier to distinguish between the revisions.

*Sample Internet Explorer browser download prompt showing the revision number appended to the file name*



The revision number will be appended to all system PDF filenames wherever they are available for download in EM.

TO CONFIGURE:

No configuration necessary.

## **Assign Reviewer Number at Review Completion**

In EM version 12.0, EM Publications that use ‘single-blind’ or ‘double-blind’ workflows need to hide sensitive Reviewer information from the Author of the submission. Blind workflows are supported by assigning ‘Reviewer Numbers’ in lieu of displaying the name of the Reviewers. Reviewer numbers are assigned when a Reviewer agrees to review a submission (or is assigned to review) and persist throughout subsequent revisions if the Reviewer reviews other versions of the submission. Even though a Reviewer may be the first to agree to review the submission, they might later be uninvited or terminated before completing the Review. If that Reviewer isn’t invited to review later revisions of the submission, the Author will not see any comments from ‘Reviewer 1’.

New in EM version 12.1, publications will have the option to have the Reviewer number assigned when a Reviewer submits their first completed Review for the submission, rather than at the point of agreement or assignment. Just like existing Reviewer number functionality, when the new option is enabled Reviewers will still keep their originally assigned number if they are invited to review later versions of the same submission.

TO CONFIGURE:

The 'Set Reviewer Due Date Preferences' page in *PolicyManager* is renamed 'Set Reviewer Preferences'.

Sample PolicyManager Main Menu (*partial*)

**PolicyManager Main Menu**

Expand All    Collapse All

- ⊕ Registration and Login Policies
- ⊕ Status Policies
- ⊕ Submission Policies
- ⊕ Questionnaire Policies
- ⊕ Additional Data Policies
- ⊕ Editor Assignment Policies
- ⊕ Reviewer and Editor Form Policies
- ⊕ E-mail and Letter Policies
- ⊖ General Policies
  - Set Manuscript Number Type
  - Set Manuscript Number Revision Suffix
  - Set Date Format
  - Configure Unavailability Check and Instructions
  - Set Time Zone Display Policy
  - Set ISO Country Standard
  - Configure General Due Date Preferences
  - Set Reviewer Preferences**
  - Configure Electronic Calendar Due Date Preferences
  - Set Editor Deep Link Expiration
  - Set Enterprise Analytics Reporting Deep Link

On the new 'Set Reviewer Preferences' page, the Reviewer Due Date Preferences ('Invited Mode' or 'Agreed Mode') are merged onto the same page with the new Reviewer Number Assignment options. Administrators will be able to choose whether Review numbers are assigned when the Reviewer agrees to Review or is directly assigned (existing functionality) or if the numbers are assigned when a Reviewer completes their first review for the submission by selecting the desired radio button in the 'Reviewer Number Assignment section' of the page.

## Sample Set Reviewer Preferences page

### Set Reviewer Preferences

---

#### Reviewer Due Date Calculation

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

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

#### Reviewer Number Assignment

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

- On Agreement/Assignment - The Reviewer Number is assigned when the Reviewer first agrees to review a submission (or is assigned).
- On Submission of Completed Review - The Reviewer Number is assigned when the Reviewer submits his first complete review for a submission.

Cancel

Submit



## Additional Data in Review Status Columns

In EM version 12.0, the Review Status Column is displayed in eleven Editor folders. The column offers a quick view of Reviewer information without having to navigate to the Reviewer Selection Summary page.

New in EM version 12.1, the Review Status column is enhanced to include an expandable cell containing detailed information previously only available on the Reviewer Selection Summary page. Users can hover their cursor over the collapsed information to see an overlay with the detailed information such as:

- ✚ Each section of the detailed cell (Complete, Partial Review Saved, Agreed, Invited – No Response, Declined) displays a count of Reviewers who fall under each respective category
- ✚ Reviewer Names are listed with a hyperlink to the *People Information* page.
- ✚ If the Reviewer was suggested by the Author, it is noted.
- ✚ For completed Reviews, the Reviewer Recommendation Term is displayed with a hyperlink to view the individual reviews and comments. The minimum number of required reviews is displayed.
- ✚ For Partial Review Saved and Agreed, the due date is displayed if the due date is in the future, and the number of days late is displayed if the review due date has passed.
- ✚ For Reviewers who have been invited but have not yet responded, the number of days that have passed since the invitation was sent is displayed.
- ✚ Declined Reviewers are also displayed. If entered by the Reviewer, the decline reason is shown. If the reason for the decline is longer than 200 characters, a ‘Decline Reason’ link is available that will launch a scrollable overlay containing the full decline reason.

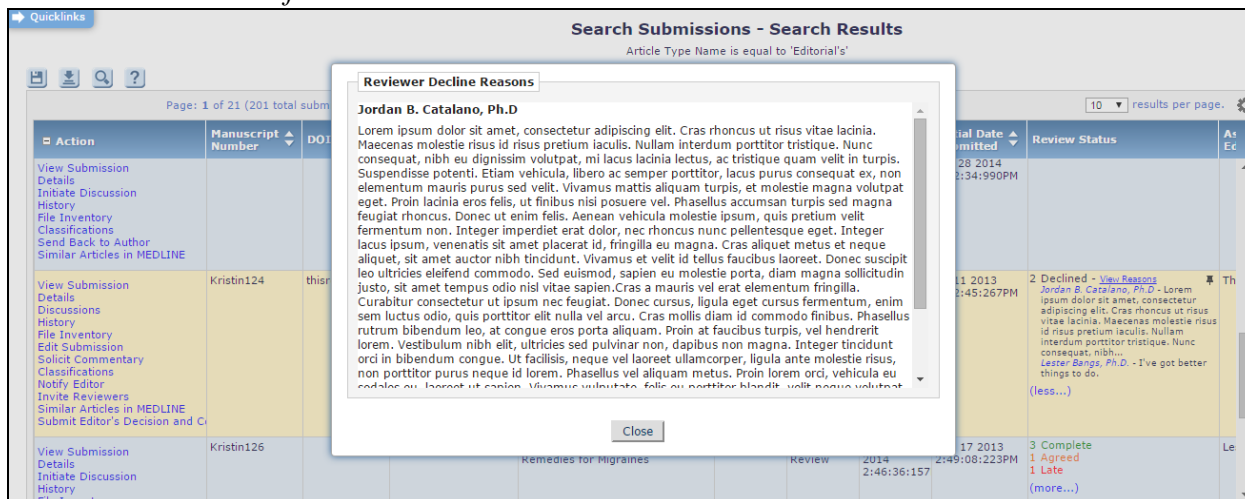
NOTE: The link to the ‘Decline Reason’ overlay is also newly implemented on the Reviewer Selection Summary page for decline reasons longer than 200 characters.

### Sample View All Assigned Submissions folder with hover overlay displayed

<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Classifications</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Invite Reviewers</a> <a href="#">Solicit Commentary</a> <a href="#">Notify Editor</a> <a href="#">Similar Articles in MEDLINE</a>	7056-4	Editorial's	Brand New Jam	Heebie Jeebies Ph.D	Jun 19 2009 12:17:22:407PM	Mar 25 2013 12:05:43:247PM	Under Review	Mary Shelby Roman	1 Agreed 13 Invited - No Response 1 Late (more...)
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Classifications</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Invite Reviewers</a> <a href="#">Solicit Commentary</a> <a href="#">Notify Editor</a> <a href="#">View Reviews and Comments</a> <a href="#">Similar Articles in MEDLINE</a>	7056-3	Editorial's	Reminder Test Three - Just in Case	Heebie Jeebies Ph.D	Jun 4 2009 4:52:57:513PM	Jun 29 2009 5:41:36:410PM	Under Review	Mary Shelby Roman	1 Complete Oreo Cookie, M.D. - Accept 2 Total Required 1 Partial Review Saved Jarvis Cocker Late: 2173 days 1 Agreed Celine 'Greatest Singer...' Late: 2211 days 5 Invited - No Response asdfasdf asdfasdf Invited 2206 days ago Candy Cane, Ph.D Invited 2206 days ago Henry Rollins, M.D. Invited 2211 days ago Jordan B. Catalano, Ph.D Invited 2206 days ago Lester Bangs, Ph.D. Invited 2206 days ago
<a href="#">View Submission Details</a> <a href="#">History</a> <a href="#">Classifications</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Invite Reviewers</a> <a href="#">Solicit Commentary</a> <a href="#">Notify Editor</a> <a href="#">Similar Articles in MEDLINE</a>	7056-1	Editorial's	Reminder Test Two - Thurston Moore	Heebie Jeebies Ph.D	Jun 4 2009 4:52:50:717PM	Jun 4 2009 5:51:25:223PM	Under Review	Thurston Moore	1 Agreed

In the hover overlay, clicking the small pushpin icon in the upper right corner or the (more...) link will “pin” the cell in its expanded state to the grid. To collapse the cell back to its basic display, either click the pushpin icon again or click the ‘(...less)’ link.

*Sample Search Submissions (Beta Grid) page with pinned Reviewer Status cell and ‘View Reasons’ link clicked for a Declined Reviewer*



As in existing functionality, the ‘Reviewer Status’ column is available in the following folders:

1. Submissions with Rescinded Decision
2. Submissions with Required Reviews Complete
3. Submissions Requiring Additional Reviewers
4. Submissions with One or More Late Reviews
5. Submissions Under Review
6. Submissions with X Reviews Complete
7. View All Assigned Submissions
8. Group by Editors I Assigned
9. Group by Editor with Current Responsibility
10. Group by Manuscript Status
11. Reviewers Invited – No Response

TO CONFIGURE:

No configuration necessary.

## Extend CrossCheck Results for Authors

In EM version 12.0, the CrossCheck feature compares an uploaded submission to the iThenticate checking system where the paper is compared to a database of published papers submitted to CrossCheck by participating publishers. Users in EM may be granted access to a report that details similarities between the uploaded submission and published literature.

New in EM version 12.1, a link to CrossCheck/iThenticate results is added to the Action links in the Author's 'Submissions with a Decision' folder.

### Sample Submissions with and Editorial Office Decision *folder with new CrossCheck/iThenticate results link*

Submissions with an Editorial Office Decision for Author Brittany Beaty, Ph.D.							
Page: 1 of 4 (32 total completed submissions)		1 2 3 4 >> >			Display 10 results per page.		
Action	Manuscript Number	Title	Initial Date Submitted	Status Date	Current Status	Date Final Disposition Set	Final Disposition
View Submission View Decision Letter Correspondence Send E-mail	SMOKETEST-91-12-9	記事のタイトル	Jan 9 2012 11:01:18:883AM	Apr 4 2012 1:49:40:200PM	Completed	Apr 4 2012 1:49:40:157PM	Withdrawn
View Submission View Decision Letter CrossCheck/iThenticate Results (32%) Correspondence Send E-mail	SMOKETEST-92-12-60	New Submission #2 - Jennifer	Sep 19 2012 12:57:38:800PM	Sep 28 2012 9:42:40:023AM	Withdrawn Conference Submission	Sep 28 2012 9:42:39:973AM	Withdrawn
View Submission Author Status View Decision Letter CrossCheck/iThenticate Results (33%) Correspondence Send E-mail	SMOKETEST-92-12-44	Testing Author Institution	Sep 17 2012 11:58:28:133AM	Jan 29 2013 1:23:52:987PM	Submission Transferred	Jan 29 2013 1:23:52:930PM	Transfer

TO CONFIGURE:

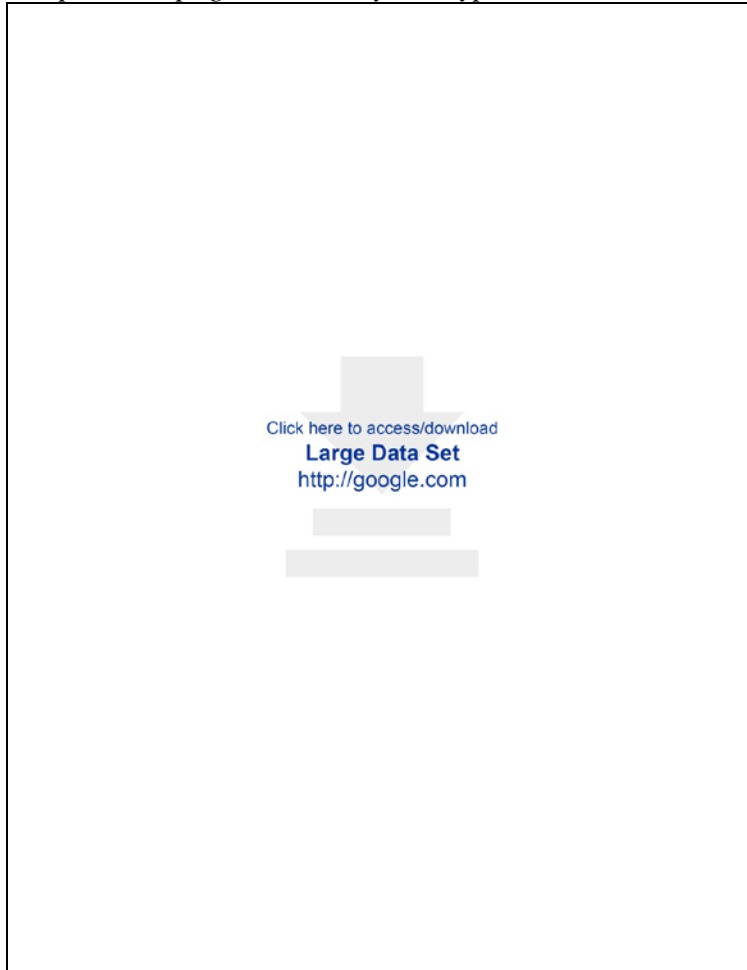
No additional configuration necessary.

## Improve Readability for Links in PDF

In EM version 12.0, submission items configured as 'Build Hyperlink to the Item in PDF (Item Not Displayed in PDF)' or in cases where the Author has supplied a URI/URL in lieu of an uploaded file, the link to the item or URI/URL appears at the very top of the page and may be easy to miss. The page containing only the link is otherwise completely blank.

In EM version 12.1, the links to items and URIs/URLs are moved to the middle of the page and the font size is increased. A download icon watermark is displayed behind the link.

*Sample PDF page where only the hyperlink to the item displays*



For other submission items that build the file into the PDF but also provide a download link, the link is moved to the right side of the PDF on the same line as the submission item description.

### TO CONFIGURE:

No configuration necessary. In existing functionality, hyperlinks in the PDF are configured on the 'Configure Submission Items' page in *PolicyManager*.

## Shared Letter Templates

In EM version 12.0, letters are managed separately on each publication within the group. If Administrators want to add the same letter to every site in the group, it must be done on an individual basis.

New in EM version 12.1, publications in the same business publisher can manage a ‘Master’ set of letter templates that may then be shared across selected publications within the group of publications. Publications that subscribe to the Master site may still add and edit their own local letter templates as well as edit some properties of shared templates.

When a shared letter template is edited on the Master site, all subscriber sites are updated with any changes to the letter body, letter subject, and letter format (Text or HTML). The letter purpose, to’s & from’s, and ‘Allow attachments’ setting are copied initially from the Master site’s template to subscriber site but are thereafter managed only by the Subscriber site.

A Master site may share its letter templates with subscriber sites by selecting the ‘Share Letter’ checkbox next to the desired letter on the ‘Edit Letters’ page in *PolicyManager* and clicking the ‘Save Changes and Update Subscriber Sites’ button. A Master site may view all current Subscriber sites by clicking the ‘View Subscriber Sites’ link. A Master site may designate subscriber sites in *AdminManager*.

### Sample Edit Letters page for a Master site

### Edit Letters

This site is a master site for the Shared Letters feature. To share letters across all publications in a Shared Letters group, first add Subscriber Sites in AdminManager. Then, select the Share Letter checkbox for each letter template that you want to be available to subscriber sites, then click the ‘Save Changes and Update Subscriber Sites’ button. [\(more...\)](#)

[View Subscriber Sites](#)  
[Back to PolicyManager](#)

Share Letter	Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format		HTML Format
<input type="checkbox"/>	12.0-10 IJRS Test	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Approve Changes	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Instructions and Due Date	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Invitation for Commentary	Author Invitation	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Invitation for Proposal	Author Invitation	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Notice - Rebuttal Initiated	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Notice Editor Made Changes to Submission	Communications to Author	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Notice of Manuscript Number	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author PDF Build Error	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Reinstates Revision	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Revision First Reminder	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Revision Subsequent Reminder	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>

When a letter is shared to a Subscriber site, it is initially displayed at the bottom of the 'Edit Letters' page in the Hidden Letters section on the Subscriber site. Letters shared from a Master site are marked with a green 'S' icon. To use a shared letter, Administrators on a subscriber site may click 'Restore' in the Hidden Letters section of the page or replace an existing local copy of the letter with the shared letter by using the 'Replace with Shared Letter' checkbox in the local letter grid.

Sample Edit Letters page on a Subscriber site displaying Hidden Letters (partial)

<input type="checkbox"/>	Transfer Letter	Transfer Letter	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	
<input type="checkbox"/>	Welcome	General	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>

Hidden Letters							
Letter Purpose ▲▼	Letter Family Group by: ▲▼		Text Format	HTML Format	All Formats		
Reviewer Invitation	Reviewer Invitation	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>	<a href="#">Restore</a>
Text example sharing letter <span style="color: green;">S</span>	General	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>	<a href="#">Restore</a>

[Back to PolicyManager](#)

Sample Edit Letters page displaying restored shared letters on a Subscriber site. Note that the red text informs the Administrator if the site is a Subscriber site and which site is the Master site.

**Edit Letters**

This site is a subscriber site for the Shared Letters feature. Its master site is IJRSDEV121a.

The master site may have already subscribed this site to shared letter templates. If so, these are designated with a S symbol. [\(more...\)](#)

[Back to PolicyManager](#)

Replace with Shared Letter	Letter Purpose ▲▼	Letter Family Group by: ▲▼		Text Format	HTML Format		
<input type="checkbox"/>	Author Approve Changes	General	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
	Author Approve Changes <span style="color: green;">S</span>	General	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
	Author Instructions and Due Date <span style="color: green;">S</span>	General	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Instructions and Due Date	General	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Invitation for Commentary	Author Invitation	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
	Author Invitation for Commentary <span style="color: green;">S</span>	Author Invitation	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>

The SysAdmin on a subscriber site can elect to replace an existing letter with a Shared Letter. If the original letter is tied to an ActionManager event, when the letter is replaced, the Shared letter is automatically associated with the ActionManager event. When the SysAdmin does this, the shared letter is automatically un-hidden, so they don't have to click the Restore link first.

Selecting the 'Replace with Shared Letter' checkbox next to the local version of the letter template and clicking the 'Replace Selected Letters with Shared Letters' button will bring the user to the 'Replace with Shared Letter' page where they can select the corresponding shared letter to take the place of the locally-created template. Replacing a locally-created template with a shared template from a Master site ensures that the Subscriber site has access to the most up-to-date letter content from the Master site.

*Sample Replace with Shared Letter page*

### Replace with Shared Letter

Listed below are all the letter templates that you have selected to be replaced by a Shared Letter template. Replacing an existing letter template with a shared letter template will hide the existing letter template. If the existing letter template is associated with an ActionManager event or Editor Decision Term, the replacement letter will automatically be associated with the same ActionManager event or Editor Decision Term, and the existing letter template will no longer be associated with it.

To replace an existing letter template with a shared letter template, select the appropriate shared letter template from the drop-down list. When you have finished making all selections, click the Submit button.

Letter Purpose	Letter Family	Replace with:
Author Instructions and Due Date	General	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #2c3e50; color: white; padding: 2px;">Author Instructions and Due Date ▾</div> <div style="padding: 2px;">Please Choose</div> <div style="padding: 2px;">Author Approve Changes</div> <div style="padding: 2px; background-color: #3498db;">Author Instructions and Due Date</div> <div style="padding: 2px;">Example HTML Letter</div> <div style="padding: 2px;">HTML Letter Testing Share</div> <div style="padding: 2px;">Text example sharing letter</div> </div>

**TO CONFIGURE:**

A Master site must be established. In *AdminManager*, a new 'Configure Shared Letters Management' section is added.

## AdminManager Main Menu

- [Set Live Journal Flag](#)
- [Manage Publication Groups](#)
- [Set Default Target FTP Site for Extract of Conference Submissions](#)
- [Share People](#)
- [Configure Shared Letters Management](#)
- [Configure Cross-Publication Submission Transfer](#)
- [View File Transfer Statistics](#)
- [Configure Restricted System Administration Access Rights](#)

The 'Configured Shared Letters Management' page initiates the Shared Letters feature and designates the site as a 'Master' site. To begin sharing letters and designate a site as a Master site, the 'Enable Shared Letters and designate this site as a master site' setting must be enabled.

Sample initial Configure Shared Letters Management page

### Configure Shared Letters Management

Confirming the letter sharing relationship and establishing a shared letters group is the responsibility of the publications involved.

The Shared Letters feature enables one site (known as a "master site"), to designate specific letter templates as "shared" and then push those shared letter templates to selected sites, known as "subscriber sites".

To configure this site as a master site for the Shared Letters feature, select the checkbox 'Enable Shared Letters and designate this site as a master site', then click the Submit button. The confirmation page will contain a "Manage Subscriber Sites" link, allowing you to add subscriber sites.

To designate letter templates as "shared" and push them to subscriber sites:  
First configure this site as a master site on this page and add subscriber sites using the "Manage Subscriber Sites" link. Then go to PolicyManager, Edit Letters for letter configuration.

Enable Shared Letters and designate this site as a master site

After the Master site is established, an Administrator may add or remove Subscriber sites by clicking the 'Manage Subscriber Sites' link on the Configure Shared Letters Management page. Multiple sites may be entered at a time by entering the sites' 'Aries' Publication code, separated by semicolons.

Sample Configure Shared Letters Management page – Master site

### Configure Shared Letters Management

Confirming the letter sharing relationship and establishing a shared letters group is the responsibility of the publications involved.

This site is the master site for the Shared Letters Group. To select or unselect subscriber sites, click the Manage Subscriber Sites link.

To disable the Shared Letters feature for all sites in the group, select the 'Disable Shared Letters' checkbox and click the Submit button. This will break the sharing relationship between the master site and all subscriber sites. Any shared letters will remain on this site and the subscriber sites and will become editable on the subscriber sites, but will no longer be designated as 'shared'.

*Note: There can only be one publication site designated as the master site for each set of subscriber sites (Shared Letters Group).*

The shared letters feature has been enabled and this site is a master site. [Manage Subscriber Sites](#)

Disable Shared Letters (on this site and all subscriber sites)



Sample Manage Subscriber Sites page

### Manage Subscriber Sites

Listed below are all the publications that are subscribers to this master site. The publications listed below, plus the current publication, are considered to be in the same 'Shared Letters Group'.

To add a new publication to the Shared Letters group, type that publication's code into the 'Additional Subscriber Sites' box (or a list of publication codes separated by semi-colons), and click the 'Add New Subscriber Sites' button. After all desired sites have been added using the 'Add New Subscriber Sites' button, click the Close button.

To unsubscribe a site, select the checkbox in the 'Terminate Subscriber Relationship' column and click the 'Terminate Selected Sites' button.

Publication Code	Full Publication Title	Terminate Subscriber Relationship
IJRSDEV121b	IJRS TEST B 12.1	<input type="checkbox"/> <a href="#">Select All/ Clear All</a>
IJRSDEV121c	Test IJRS 12.1 c	<input type="checkbox"/>

Additional Subscriber Sites (Enter Publication Codes):

*Enter one publication code or a list of publication codes separated by semi-colons.*

# PRODUCTION TRACKING ENHANCEMENTS

## Use Manuscript Number in Production Task Export File Names

In PM version 12.0, Submission Production Tasks may be configured to ftp a [prefix].zip file and corresponding [prefix].go.xml file as part of a Submission Production Task assignment. In most of PM's standard Submission Production Task Export methods, the [prefix] in the exported file names is the Submission Production Task's Globally Unique Identifier (GUID).

In PM version 12.1, publications have the option of using the Manuscript Number in the .zip and go.xml prefixes instead of the Submission Production Task's GUID. Selecting this option on the 'Add/Edit Submission Production Task' page will change the prefix of the .zip and go.xml file to be a combination of the Manuscript Number (without the revision number) and the Submission Production Task Assignment's 'Unique Identifier' (different from the Task's GUID), separated by an underscore: [ManuscriptNumber]\_[Identifier].zip and [ManuscriptNumber]\_[Identifier].go.xml.

### TO CONFIGURE:

Add or Edit any Submission Production Export Task by clicking the 'Configure Submission Workflows and Production Tasks' link in the ProduXionManager section of *PolicyManager*. Click 'Edit' for the 'All Submission Production Tasks' workflow. Either add a new task or click the '[Edit]' link next to the intended task name. On the 'Add/Edit Submission Production Task' page, scroll to the FTP Options section of the page. Select the 'Use Manuscript Number for file names' checkbox and submit the page.

### Sample Add/Edit Submission Production Task page (partial)

editor role (corresponding authors may not reassign tasks), but it does not need to be one of the Can be Assigned by roles for this task.

Allow Recipient to Reassign

**Questionnaire Options**

Use Custom Questionnaire:

**FTP Options**

Submission Production Task Transmittal Method:

Allow task assignment and FTP without Assignment Files

Include Aries Import XML file in transmittal

FTP task without go.xml file

Use Manuscript Number for file names

FTP Server address (e.g. ftp.ariessys.com):

Username:

Password:

Subdirectory:

E-mail Address (for transmittal notification):

Submission Production Task Import Profile:

E-mail Address (for import notification):

XML file is required

Select Fields for Import

**Companion File Options**

Show Warning if File not uploaded when Task is Submitted

## MERGE FIELD ENHANCEMENTS

### Accept Reviewer Invite and Download PDF

In EM version 12.0, Reviewers can manage a new Reviewer Invitation from their inbox. The **%ACCEPT\_REVIEW\_INVITATION%** merge field performs a full login to EM and moves the invitation to the Reviewer's Pending Reviews folder. The **%VIEW\_REVIEWER\_PDF%** presents the user with a link to download the Reviewer version of the submission.

New in EM version 12.1, a merge field combines both an acceptance of a Reviewer Invitation and the option to download the Reviewer version of the submission. Clicking the deep link created by the **%ACCEPT\_REVIEW\_INVITATION\_AND\_VIEW\_REVIEWER\_PDF%** merge field will trigger an 'Accept' of the invitation behind the scenes (i.e. the user is not presented with a full login or confirmation page) and will prompt a browser dialog box to download the Reviewer's PDF. The deep link expires when the Reviewer 1) declines the invitation, 2) submits a Review, or 3) has been uninvited or terminated. If a Reviewer clicks the **%ACCEPT\_REVIEW\_INVITATION\_AND\_VIEW\_REVIEWER\_PDF%** merge field after accepting the invitation and hasn't already submitted a Review or been terminated, the link simply triggers the browser's download dialog box.