**CONFIDENTIAL AND PROPRIETARY**

# Release Notification

Editorial Manager®

ProduXion Manager®

Commerce Manager™

**Editorial Manager/ProduXion Manager**
**12.2 General Release Notification**
**02/15/2016**
**Draft – Subject to Change**

**Document Change Log**

| Date | Version | Change |
|---|---|---|
| 10/16/15 | Beta Release | Beta version |
| 11/23/2015<br>12/8/2015 | Gamma Release | Gamma Version<br>*Updates to screenshots<br>*Clarified text |
| 12/29/2015 | General Release | *Added 'View Publication Charges Permissions' feature information |
| 2/8/2016 | General Release | Formatting issues |

**Editorial Manager/ProduXion Manager 12.2 General Release Notification**

# GENERAL ENHANCEMENTS

## Replace Editor in the Chain

In EM version 12.1, a submission may be passed through several Editors in a 'chain'. The Editor Chain is created when a submission is assigned to an Editor who in turn, assigns the submission to a lower-level Editor. If an error is made during the assignment, each Editor may be unassigned individually in the reverse order in which they were assigned. If there are several Editors assigned below the erroneous Editor, each lower Editor assignment must be unassigned before an Administrator can correct the chain.

New in EM version 12.2, Editors and Administrators with appropriate permissions may replace or remove an Editor located in any position in the current Editor Assignment Chain for the current version of a submission, subject to conditions related to the state of the submission.

Depending on the logged-in user's *RoleManager* permissions, an Editor assignment can be removed from the chain or replaced by an Editor with a different Editor Role where:

The Editor being modified has NOT made or saved a decision AND one of the following applies:

- There are no unprocessed reviews (invitations, open reviews, or reviews that were submitted after the last complete decision was made) and:
  - One "Good Decision" (a complete decision that has not been skipped or terminated) has already been submitted
  - Another Editor in the chain has "Make a Decision" permission
- OR all Reviewer assignments have been processed
- OR there are unprocessed Reviewer Assignments AND there is at least one open Editor Assignment with "Make a Decision" permission.

NOTE: Replacing an Editor in the chain is not dependent on the method by which the Editor was assigned. Publications using Suggest Editor, Assign Editor Chain, individual assignment, individual invitation, and Direct-to-Editor assignments may use this feature.

To achieve this functionality, two new sub-permissions are added to the 'Unassign Myself' permission in Editor *RoleManager*: 'Unassign Subordinate Editors' and 'Replace Editor'.

- The 'Unassign Subordinate Editors' permission allows an Editor to remove his/her Editor Assignment or the Assignment(s) of lower level Editor(s).
- The 'Replace Editor' permission allows an Editor to switch his/her own assignment (or that of a lower level Editor if the user also has "Unassign Subordinate Editors" permission) to another Editor.

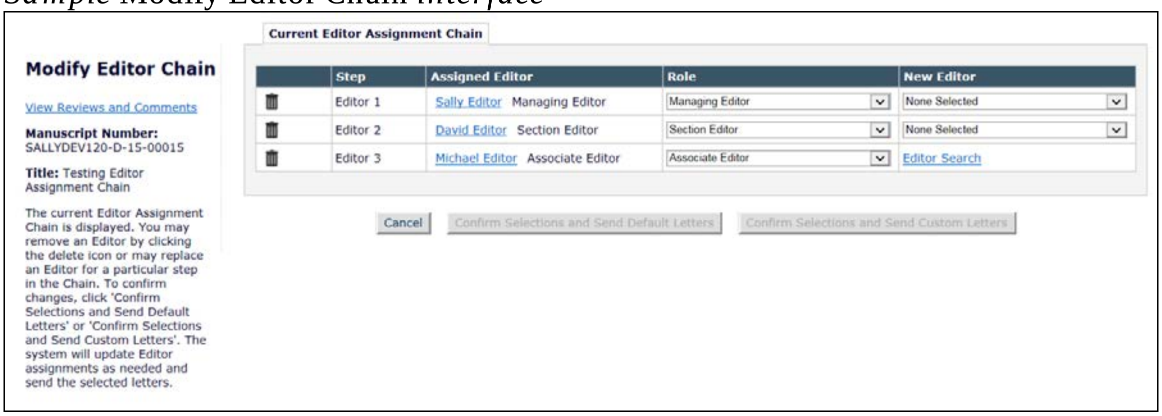
The existing permissions of 'Unassign Other Editors' in conjunction with the 'Assign Editor' permission will allow users to remove or replace Editors anywhere in the chain (provided the submission is in a state that allows this).

Additionally, the 'Unassign Editor' action link will now be more widely available for Editors with 'Unassign Other Editors' and/or 'Unassign Myself' permission. The link will now display consistently for a submission when the Final Disposition has not been set so long as the logged-in Editor has 'Unassign Other Editors' permission or has 'Unassign Myself' permission and is in the Editor Chain.

NOTE: If the logged-in user meets the above requirements but the submission is being edited, the 'Unassign Editor' action link will not be available.

To replace or remove an Editor from the Editor Chain, the Editor clicks the 'Unassign Editor' Action Link. The Editor is presented with the current Editor Chain and the actions available depend on the logged in user's permissions and the condition of the submission. The instructions on the left sidebar of this page may be customized in *PolicyManager*.

*Sample* Modify Editor Chain *interface*




From this page, Editors may click the trashcan icon to simply remove an Editor or use the 'Role' and 'New Editor' drop down lists to select a replacement for one or more Editors. Once a valid change to the Editor Chain has been made, the Editor may proceed to send the notification letters. The 'Details' page will show the Editor replacement information:

*Partial* Details *page, showing Editor replacement information – highlighted in pink text for reference only*

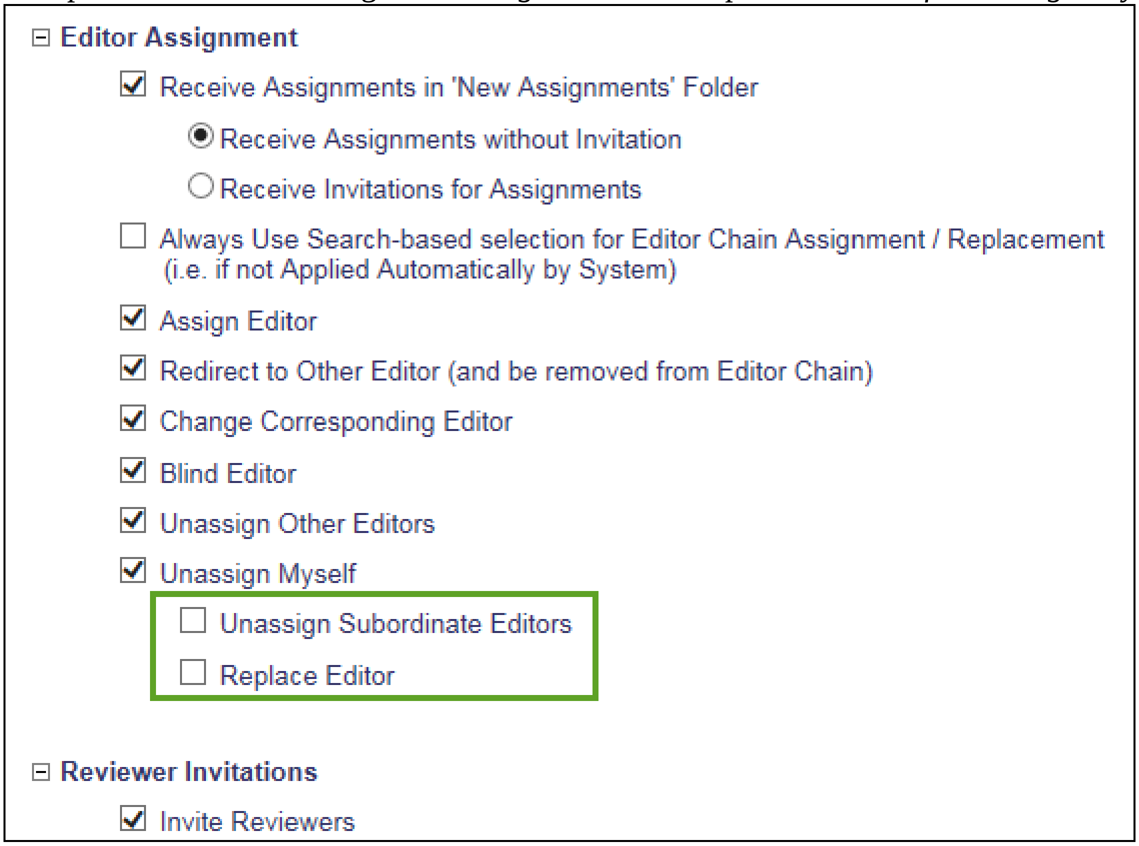

A new merge field **- %EDITOR_REPLACEMENT% -** is added for use in Unassign Editor workflows that will insert the name of the Editor being replaced as well as his/her replacement into letters in the 'Invite/Assign/Unassign Editor' letter family.

**TO CONFIGURE**:
Publications that wish to allow Editors to use the new Editor replacement functionality must enable any of the following permission combinations:

- 'Unassign Other Editors' + 'Assign Editor' – This combination will allow users to unassign and replace unassigned Editors with new selections. Editors with this permission do not need to be in the Editor Chain.
- 'Unassign Myself' + 'Replace Editor' – This combination will allow users to remove their own assignment and replace themselves with another Editor.
- 'Unassign Myself' + 'Unassign Subordinate Editors' + 'Replace Editor' – This combination allows the logged-in user to remove their own assignment and assignments in the chain below him/her and replace the unassigned Editors with new selections.

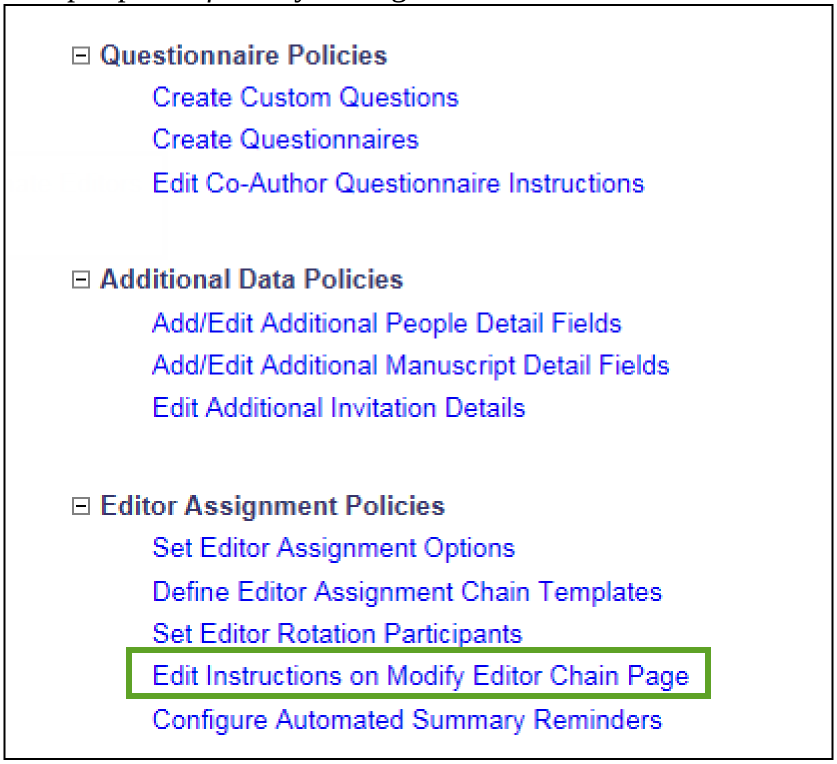
NOTE: Editors with permission to 'Unassign Myself' and 'Unassign Subordinate Editors' without the 'Replace Editor' permission will only be able to remove their own assignment and assignments below them in the Editor Chain.

*Sample* Editor RoleManager *showing the new sub-permissions of 'Unassign Myself'*

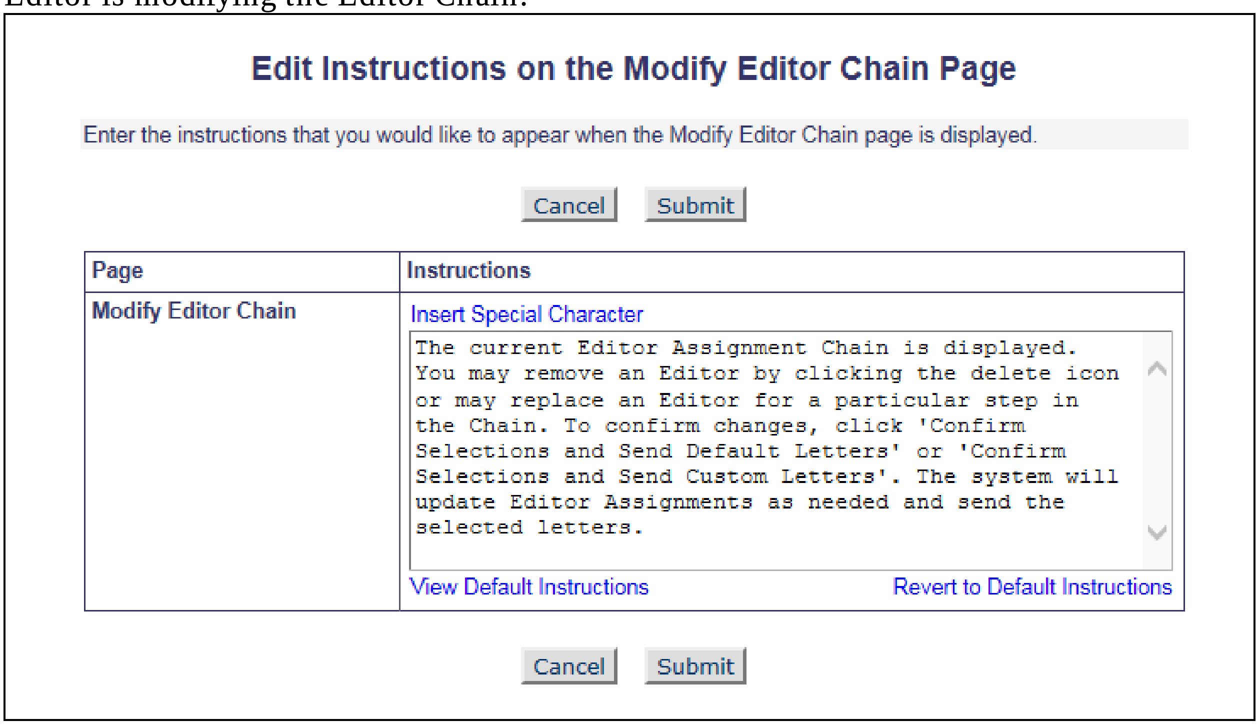



To configure the instructions shown on the left sidebar of the 'Modify Editor Chain' page, go to 'Edit Instructions on the Modify Editor Chain Page' link in *PolicyManager*.

*Sample part of* PolicyManager




After clicking the link, the user will be able to enter custom text to be displayed when an Editor is modifying the Editor Chain:



## Proxy Registration Enhancements

In EM/PM version 12.1, the fields presented to Editors when proxy registering a new user are based on the fields configured for self-registration – for example, if a field is configured as "Hidden" for self-registration, it is not displayed to Editors when proxy registering a new user. Also, if a field is defined as "Required" for self-registration, it is displayed during the proxy registration process in red text with an asterisk as if it were required; however, the requirement is not enforced for Editors and they can successfully proxy register a new user without supplying complete information.

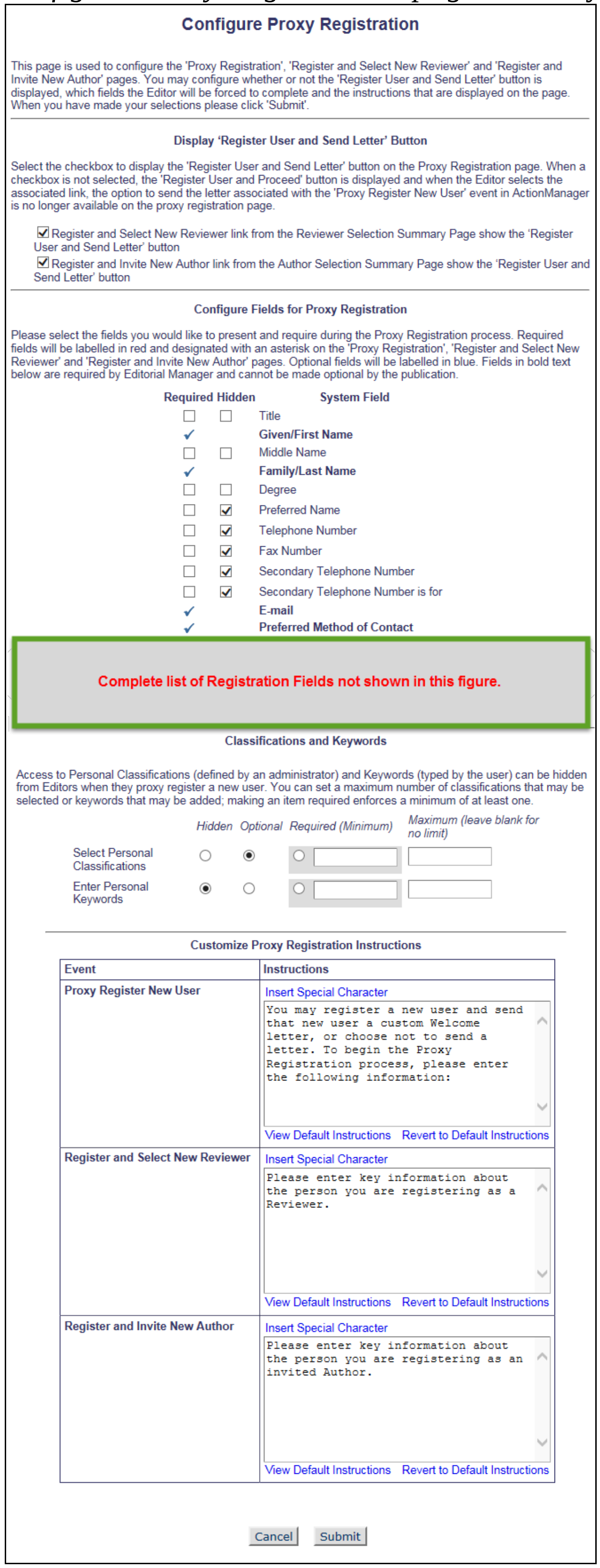
New in EM/PM version 12.2, a new 'Configure Proxy Registration' page is added to *PolicyManager* so publications can create a separate set of criteria collected during proxy registration. Additionally, the selected fields configured for proxy registration may be configured to be required so proxy registered users aren't entered into the system with incomplete information.

NOTE: The new 'Configure Proxy Registration' page may not be available for publications that have some of the existing "behind-the-scenes" proxy registration security features in place. Your Aries Account Coordinator will be able to let you know if this feature is applicable.

Additionally, publications can now configure the suppression of the Register and Send Letter button so the Editor does not have the option to send a notification letter to the proxy registered user.

**TO CONFIGURE**:
Access the new 'Configure Proxy Registration' page in *PolicyManager* under the 'Registration and Login Policies' subheading. Similar to the existing 'Edit Registration Fields', an Administrator may choose which registration fields to require or hide during proxy registration. From this page, the proxy registration instructions may also be customized and the publication can choose whether the 'Register User and Send Letter' button is displayed for 'Register and Select New Reviewer' and 'Register and Invite Author'.

*Sample 'Configure Proxy Registration' page in* PolicyManager



Configure Proxy Registration

This page is used to configure the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. You may configure whether or not the 'Register User and Send Letter' button is displayed, which fields the Editor will be forced to complete and the instructions that are displayed on the page. When you have made your selections please click 'Submit'.

**Display 'Register User and Send Letter' Button**

Select the checkbox to display the 'Register User and Send Letter' button on the Proxy Registration page. When a checkbox is not selected, the 'Register User and Proceed' button is displayed and when the Editor selects the associated link, the option to send the letter associated with the 'Proxy Register New User' event in ActionManager is no longer available on the proxy registration page.

☑ Register and Select New Reviewer link from the Reviewer Selection Summary Page show the 'Register User and Send Letter' button

☑ Register and Invite New Author link from the Author Selection Summary Page show the 'Register User and Send Letter' button

**Configure Fields for Proxy Registration**

Please select the fields you would like to present and require during the Proxy Registration process. Required fields will be labelled in red and designated with an asterisk on the 'Proxy Registration', 'Register and Select New Reviewer' and 'Register and Invite New Author' pages. Optional fields will be labelled in blue. Fields in bold text below are required by Editorial Manager and cannot be made optional by the publication.

| Required | Hidden | System Field |
|---|---|---|
| ☐ | ☐ | Title |
| ✓ | | **Given/First Name** |
| ☐ | ☐ | Middle Name |
| ✓ | | **Family/Last Name** |
| ☐ | ☐ | Degree |
| ☐ | ☑ | Preferred Name |
| ☐ | ☑ | Telephone Number |
| ☐ | ☑ | Fax Number |
| ☐ | ☑ | Secondary Telephone Number |
| ☐ | ☑ | Secondary Telephone Number is for |
| ✓ | | **E-mail** |
| ✓ | | **Preferred Method of Contact** |

Complete list of Registration Fields not shown in this figure.

**Classifications and Keywords**

Access to Personal Classifications (defined by an administrator) and Keywords (typed by the user) can be hidden from Editors when they proxy register a new user. You can set a maximum number of classifications that may be selected or keywords that may be added; making an item required enforces a minimum of at least one.

| | *Hidden* | *Optional* | *Required (Minimum)* | *Maximum (leave blank for no limit)* |
|---|---|---|---|---|
| Select Personal Classifications | ○ | ◉ | ○ | |
| Enter Personal Keywords | ◉ | ○ | ○ | |

**Customize Proxy Registration Instructions**

| **Event** | **Instructions** |
|---|---|
| **Proxy Register New User** | Insert Special Character<br>You may register a new user and send that new user a custom Welcome letter, or choose not to send a letter. To begin the Proxy Registration process, please enter the following information:<br>View Default Instructions Revert to Default Instructions |
| **Register and Select New Reviewer** | Insert Special Character<br>Please enter key information about the person you are registering as a Reviewer.<br>View Default Instructions Revert to Default Instructions |
| **Register and Invite New Author** | Insert Special Character<br>Please enter key information about the person you are registering as an invited Author.<br>View Default Instructions Revert to Default Instructions |

Cancel Submit

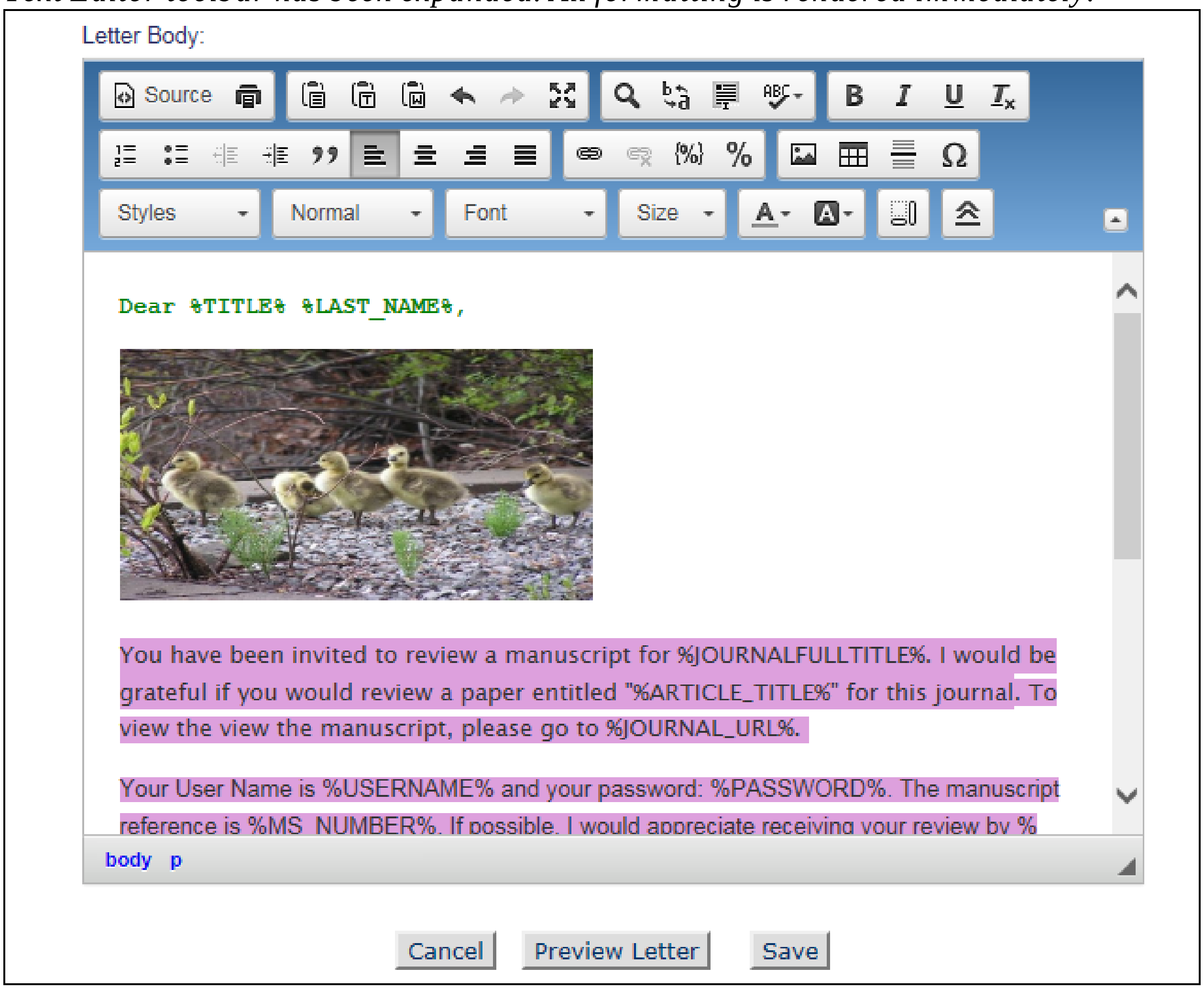
## Rich Text Management for Letters

In EM/PM version 12.1, letters may be configured to support HTML on the 'Edit Letters' page of *PolicyManager*. HTML tags may be added manually to letter templates and users may see how the markup is rendered by clicking the 'Preview Letter' button. Additionally, previously uploaded images may be entered into HTML letters by clicking the 'Insert Image' link.

In EM/PM version 12.2, publications using HTML letters will now have access to a Rich Text Editor that will aid in letter formatting and will render HTML and images as a user is editing the letter. The Rich Text Editor is added to the Add/Edit HTML letter template interface in *PolicyManager* as well as on the 'Customize Letter' interface throughout the EM/PM system.

NOTE: After upgrade, it would be beneficial to examine any existing Rich Text (HTML) letters that are configured in *PolicyManager* to ensure proper formatting.

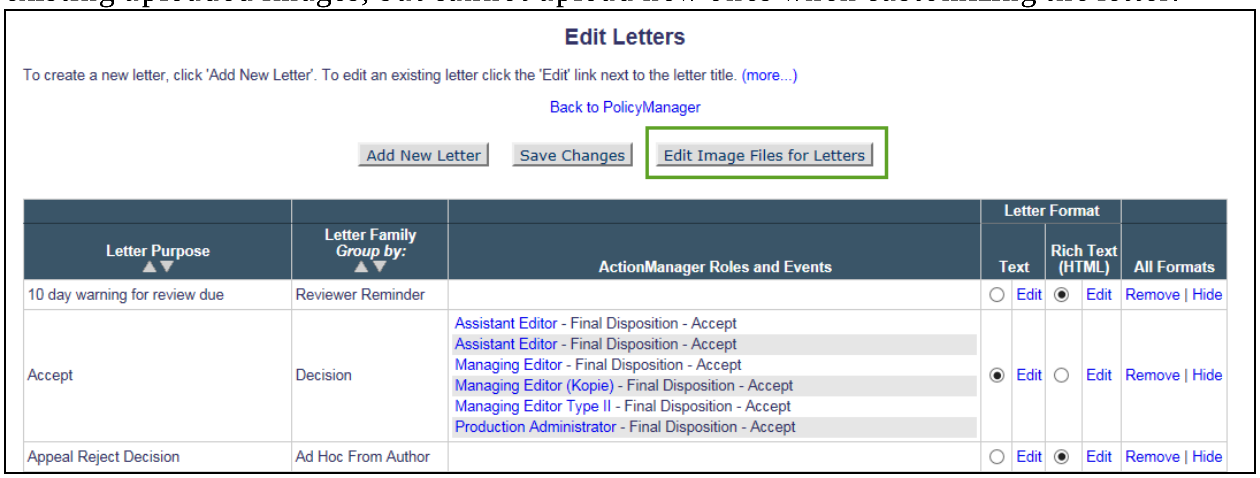
*Sample* Rich Text Editor *interface on the* Edit Letter *template in* PolicyManager, *Rich Text Editor toolbar has been expanded. All formatting is rendered immediately.*



The toolbar uses common icons to show formatting options. Each icon displays hover-over text that provides a short description of what the button does.
Some of the standard EM/PM letter functions have also been added to the Rich Text editor toolbar, replacing the links that appear above the letter body field:

- ‘Insert Custom Merge Fields’
- ‘Insert System Merge Fields’
- ‘Insert Image’

As in existing functionality, the user customizing the letter can select from the list of existing uploaded images, but cannot upload new ones when customizing the letter.



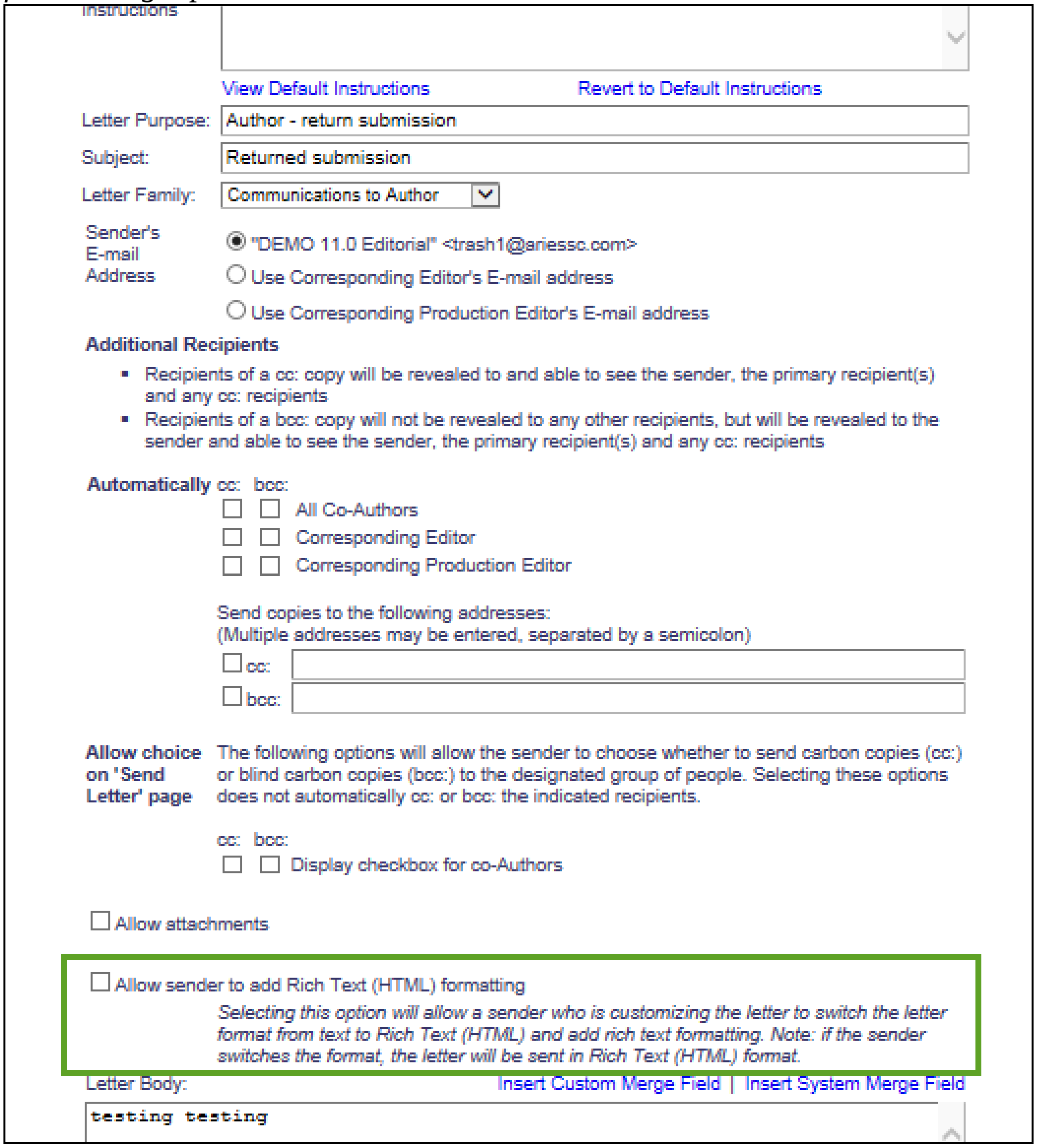

| Letter Purpose | Letter Family Group by: | ActionManager Roles and Events | Letter Format: Text | | Letter Format: Rich Text (HTML) | | All Formats |
|---|---|---|---|---|---|---|---|
| 10 day warning for review due | Reviewer Reminder | | ○ | Edit | ◉ | Edit | Remove \| Hide |
| Accept | Decision | Assistant Editor - Final Disposition - Accept<br>Assistant Editor - Final Disposition - Accept<br>Managing Editor - Final Disposition - Accept<br>Managing Editor (Kopie) - Final Disposition - Accept<br>Managing Editor Type II - Final Disposition - Accept<br>Production Administrator - Final Disposition - Accept | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Appeal Reject Decision | Ad Hoc From Author | | ○ | Edit | ◉ | Edit | Remove \| Hide |

To edit a letter template using the Rich Text Editor, click the ‘Edit’ link in the ‘Rich Text (HTML)’ column of the ‘Edit Letters’ page. The Rich Text Editor toolbar will also be available on the ‘Customize Letter’ interface for Rich Text (HTML) letters. The ‘maximize’ icon in the upper right corner of the toolbar - - will expand the display of the letter body to fill the size of the System Administrator window.
The Rich Text toolbar can be expanded to reveal more formatting options or collapsed to show a smaller selection of popular letter formatting tools. The icon will expand the toolbar and the icon will collapse an expanded toolbar.

*Sample* Customize Letter *interface for a Rich Text-configured letter. Rich Text Editor toolbar is collapsed.*


There is a new option to allow Rich Text Editing of letters currently configured as 'Text' on the 'Edit Letters' page. Selecting this option will allow users customizing the text letter prior to sending to use the Rich Text Editor toolbar in the 'Customize Letter' interface by clicking the 'Add Formatting' link above the letter body.

*Sample 'Text' letter template showing the new 'Allow sender to add Rich Text (HTML) formatting' option*



*Sample* Customize Reviewer Invitation Letter *interface: This is a Text letter, but the 'Allow sender to add Rich Text (HTML) formatting' option has been selected for the letter template. Clicking 'Add Formatting' will enable the Rich Text toolbar on the page. and sends the letter as an HTML-formatted letter instead of a plain text letter.*


**TO CONFIGURE:**

The Rich Text Editor toolbar is automatically available for any existing and newly added HTML letter.

To allow the option of using the Rich Text toolbar during letter customization, select the 'Allow sender to add Rich Text (HTML) formatting' checkbox on the Text letter template page in *PolicyManager* > 'Edit Letters'.

## Discussion Forum for Reviewers

In EM version 12.1, Editors may be invited to participate in conversations with other invited Editors regarding a submission using EM's Discussion Forum feature.

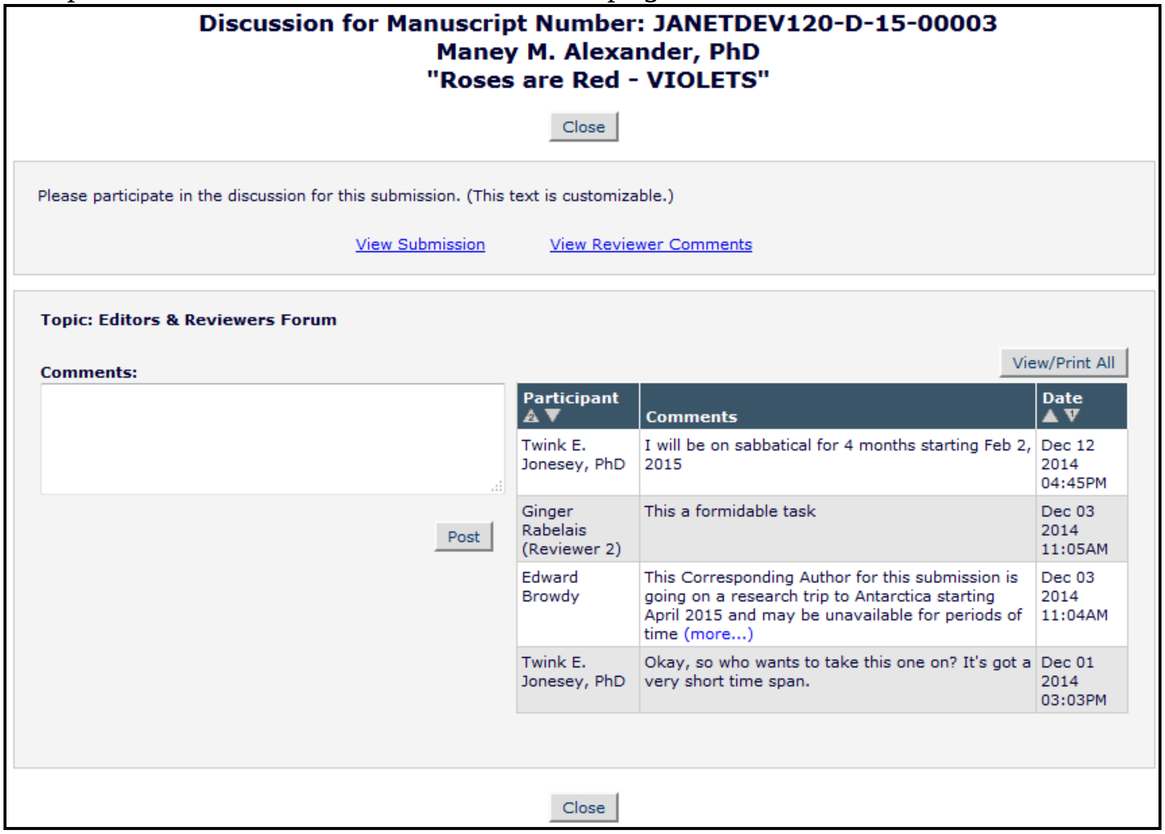
New in EM version 12.2, Reviewers who have completed a Review for a submission will be able to participate in a Discussion Forum created just for Reviewers and Editors assigned to the submission. This is done by using a new 'Discussion Type' called 'Reviewer Consultation'.
The new Reviewer Discussion Forum feature essentially is just creating a new Discussion Type – the existing Discussion Forum functionality is retained. However, many Editorial Manager configuration pages have been modified to accommodate the new changes.

NOTE: Unlike discussions using the 'Editor Consultation' (existing Discussion Forum functionality), only one 'Reviewer Consultation' may be opened per submission.

Although Editors with 'Initiate and Manage Discussions' permission may manage a 'Reviewer Consultation' discussion, most of the handling of this type of discussion is automated to reduce the workload of Editors. Initiation of a 'Reviewer Consultation' discussion is configured in *PolicyManager* per Article Type on the 'Configure Automatic Discussion Initiation' page. The automated functionality of the 'Reviewer Consultation is as follows:

- The 'Reviewer Consultation' is opened automatically when the first Editor for a new submission (Revision 0 only) is either assigned or agrees to handle a submission.
- All Editors and Reviewers assigned to the submission for all versions/revisions are added automatically to the discussion.
- The 'Reviewer Consultation' discussion remains open throughout all revisions unless an Editor with permission to manage discussions closes it.
- The 'Reviewer Consultation' discussion is concluded automatically when the Final Disposition is set for the submission.

*Sample* Reviewer Consultation *Discussion page – Reviewer's view*



**Discussion for Manuscript Number: JANETDEV120-D-15-00003**
**Maney M. Alexander, PhD**
**"Roses are Red - VIOLETS"**

Close

Please participate in the discussion for this submission. (This text is customizable.)

View Submission    View Reviewer Comments

**Topic: Editors & Reviewers Forum**

**Comments:**

Post

View/Print All

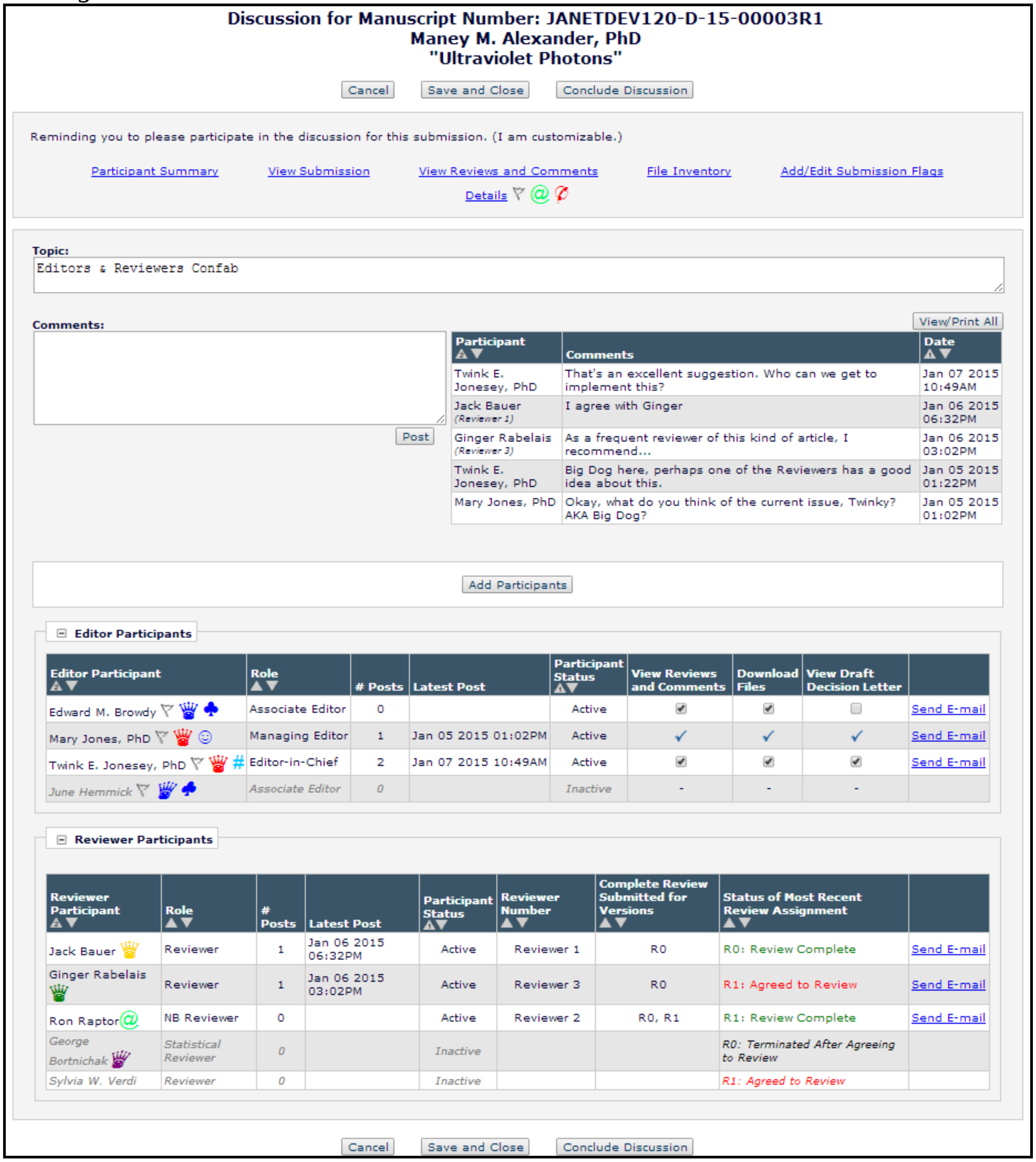
| Participant | Comments | Date |
|---|---|---|
| Twink E. Jonesey, PhD | I will be on sabbatical for 4 months starting Feb 2, 2015 | Dec 12 2014 04:45PM |
| Ginger Rabelais (Reviewer 2) | This a formidable task | Dec 03 2014 11:05AM |
| Edward Browdy | This Corresponding Author for this submission is going on a research trip to Antarctica starting April 2015 and may be unavailable for periods of time (more...) | Dec 03 2014 11:04AM |
| Twink E. Jonesey, PhD | Okay, so who wants to take this one on? It's got a very short time span. | Dec 01 2014 03:03PM |

Close

NOTE: Editors with permission to manage discussions may invite other Editors to the 'Reviewer Consultation' discussion, even if they are not attached to the submission in any way. Outside Reviewers (not attached to the submission) may not be added to the discussion.

NOTE: If an Editor is unassigned or replaced in the Editor Chain, the unassigned or replaced Editor still remains an active participant in the 'Reviewer Consultation' discussion.

*Sample* Reviewer Consultation *Discussion – Editor's view. Editor has permission to manage discussions*



**Discussion for Manuscript Number: JANETDEV120-D-15-00003R1**
**Maney M. Alexander, PhD**
**"Ultraviolet Photons"**

Cancel | Save and Close | Conclude Discussion

Reminding you to please participate in the discussion for this submission. (I am customizable.)

Participant Summary | View Submission | View Reviews and Comments | File Inventory | Add/Edit Submission Flags
Details

**Topic:**
Editors & Reviewers Confab

**Comments:**

Post

View/Print All

| Participant | Comments | Date |
|---|---|---|
| Twink E. Jonesey, PhD | That's an excellent suggestion. Who can we get to implement this? | Jan 07 2015 10:49AM |
| Jack Bauer *(Reviewer 1)* | I agree with Ginger | Jan 06 2015 06:32PM |
| Ginger Rabelais *(Reviewer 3)* | As a frequent reviewer of this kind of article, I recommend... | Jan 06 2015 03:02PM |
| Twink E. Jonesey, PhD | Big Dog here, perhaps one of the Reviewers has a good idea about this. | Jan 05 2015 01:22PM |
| Mary Jones, PhD | Okay, what do you think of the current issue, Twinky? AKA Big Dog? | Jan 05 2015 01:02PM |

Add Participants

**Editor Participants**

| Editor Participant | Role | # Posts | Latest Post | Participant Status | View Reviews and Comments | Download Files | View Draft Decision Letter | |
|---|---|---|---|---|---|---|---|---|
| Edward M. Browdy | Associate Editor | 0 | | Active | ☑ | ☑ | ☐ | Send E-mail |
| Mary Jones, PhD | Managing Editor | 1 | Jan 05 2015 01:02PM | Active | ✓ | ✓ | ✓ | Send E-mail |
| Twink E. Jonesey, PhD # | Editor-in-Chief | 2 | Jan 07 2015 10:49AM | Active | ☑ | ☑ | ☑ | Send E-mail |
| *June Hemmick* | *Associate Editor* | *0* | | *Inactive* | - | - | - | |

**Reviewer Participants**

| Reviewer Participant | Role | # Posts | Latest Post | Participant Status | Reviewer Number | Complete Review Submitted for Versions | Status of Most Recent Review Assignment | |
|---|---|---|---|---|---|---|---|---|
| Jack Bauer | Reviewer | 1 | Jan 06 2015 06:32PM | Active | Reviewer 1 | R0 | R0: Review Complete | Send E-mail |
| Ginger Rabelais | Reviewer | 1 | Jan 06 2015 03:02PM | Active | Reviewer 3 | R0 | R1: Agreed to Review | Send E-mail |
| Ron Raptor | NB Reviewer | 0 | | Active | Reviewer 2 | R0, R1 | R1: Review Complete | Send E-mail |
| *George Bortnichak* | *Statistical Reviewer* | *0* | | *Inactive* | | | *R0: Terminated After Agreeing to Review* | |
| *Sylvia W. Verdi* | *Reviewer* | *0* | | *Inactive* | | | *R1: Agreed to Review* | |

Cancel | Save and Close | Conclude Discussion

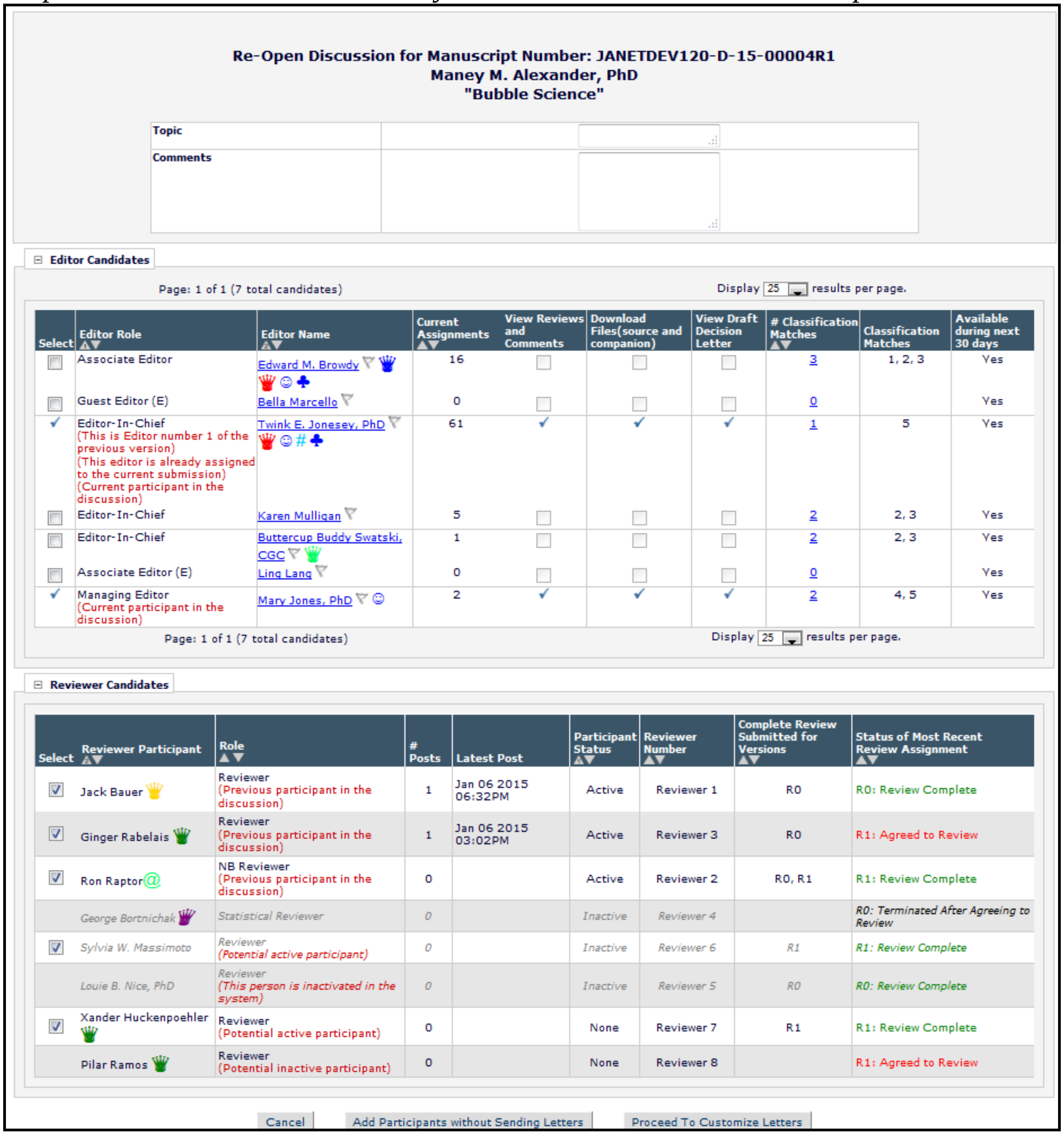
On the Editor's view of the 'Reviewer Consultation' discussion page two grids organize the Editor and Reviewer participants. The Editor participant grid contains actions – submission visibility, participant status, Editor Role, ad hoc e-mail - as the Editor Consultation. The Reviewer Status grid depicts a summary of each Reviewer's status with the submission. Editors with permission to manage discussions may add Editor participants or conclude the discussion before Final Disposition is set.

Any Reviewer who agrees to submit a Review for a submission is automatically added to the 'Reviewer Consultation' discussion, but remains an inactive participant until he or she submits a completed Review. As an inactive participant, a Reviewer who has only agreed or completed part of a Review will not receive notifications of new comments in the discussion.

Once a Reviewer becomes an active participant in a 'Reviewer Consultation' discussion, he or she remains an active participant throughout the life of the submission within EM. Reviewers who are unassigned or terminated from assignment for later Revisions remain included in the Discussion. Similarly, if a Reviewer is not invited to Review the current version of the submission but completed a Review for a previous Revision, that Reviewer remains an active participant in the Discussion.

As noted above, Editors with permission to manage discussions may manually conclude a 'Reviewer Consultation' any time during the life of a submission. Re-opening a concluded 'Reviewer Consultation' discussion will allow an Editor to add Reviewers to the discussion who may have completed Reviews while the discussion was closed. When re-opening a discussion, an Editor may convert the Reviewer Participants from 'Inactive' to 'Active' by ticking the appropriate box in the Reviewer Participants grid.

*Sample* Re-Open Discussion *interface – red help text under the Reviewer Role emphasizes which Reviewers may be best suited as Active Participants*



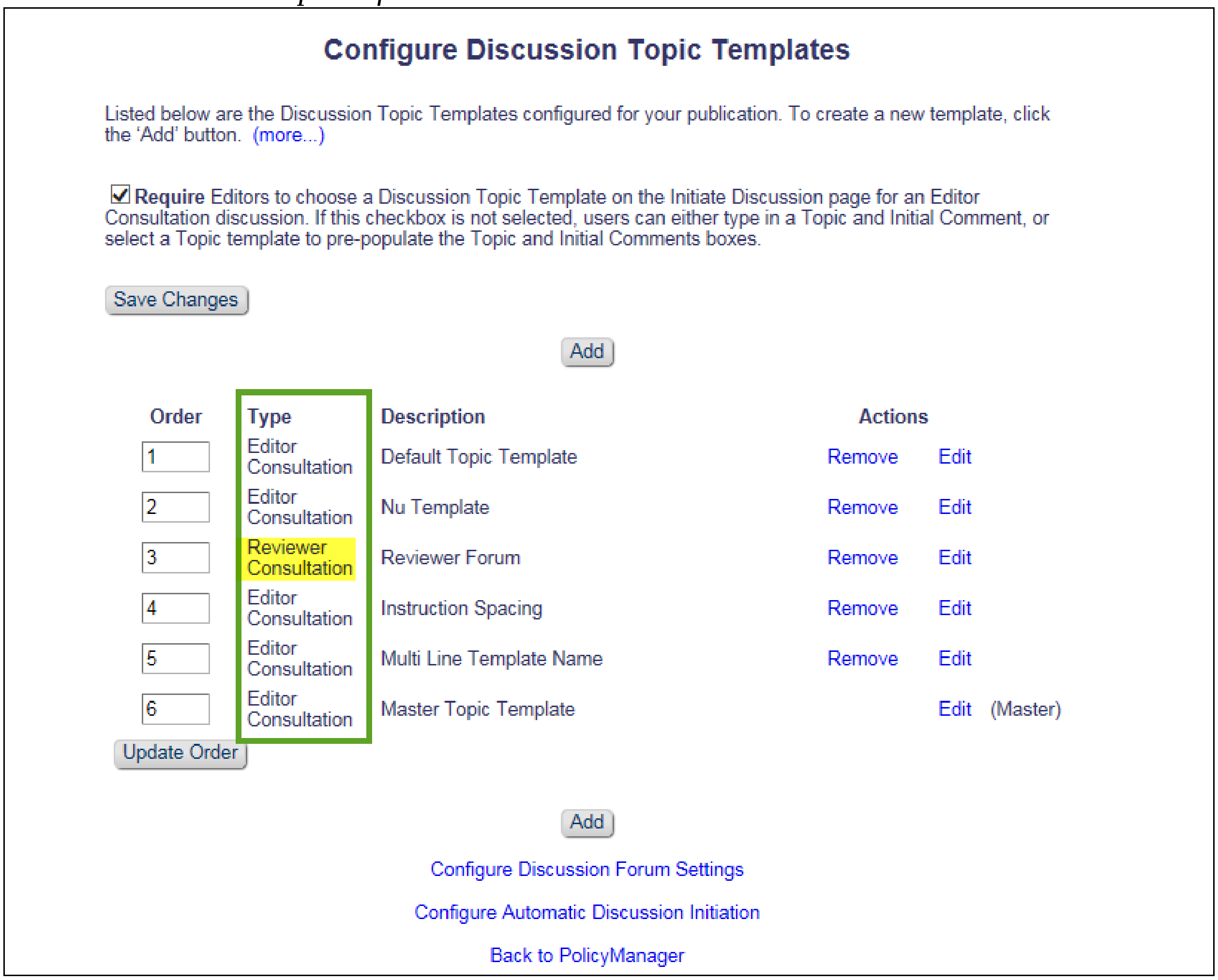

A new deep link - **%REVIEWER_DISCUSSION_DEEP_LINK%** - may be added to the 'Reviewer Thank You' letter that is sent to Reviewers after completing a Review. Clicking the deep link from the letter will log the Reviewer into EM completely and automatically navigate the user to the 'Completed Assignments' folder. If the 'Reviewer Consultation' discussion has not been concluded for the submission, the 'Discussion' page will automatically open in a pop-up. If the discussion has been concluded, the Reviewer may access the closed discussion from the 'Discussions' link.

As with the Editor discussions (existing functionality), active participants may receive notifications about new posts that have been contributed to a discussion. The existing

**%DISCUSSION_POST%** merge field may now be used in Discussion Forum letter family notifications sent to Reviewers.

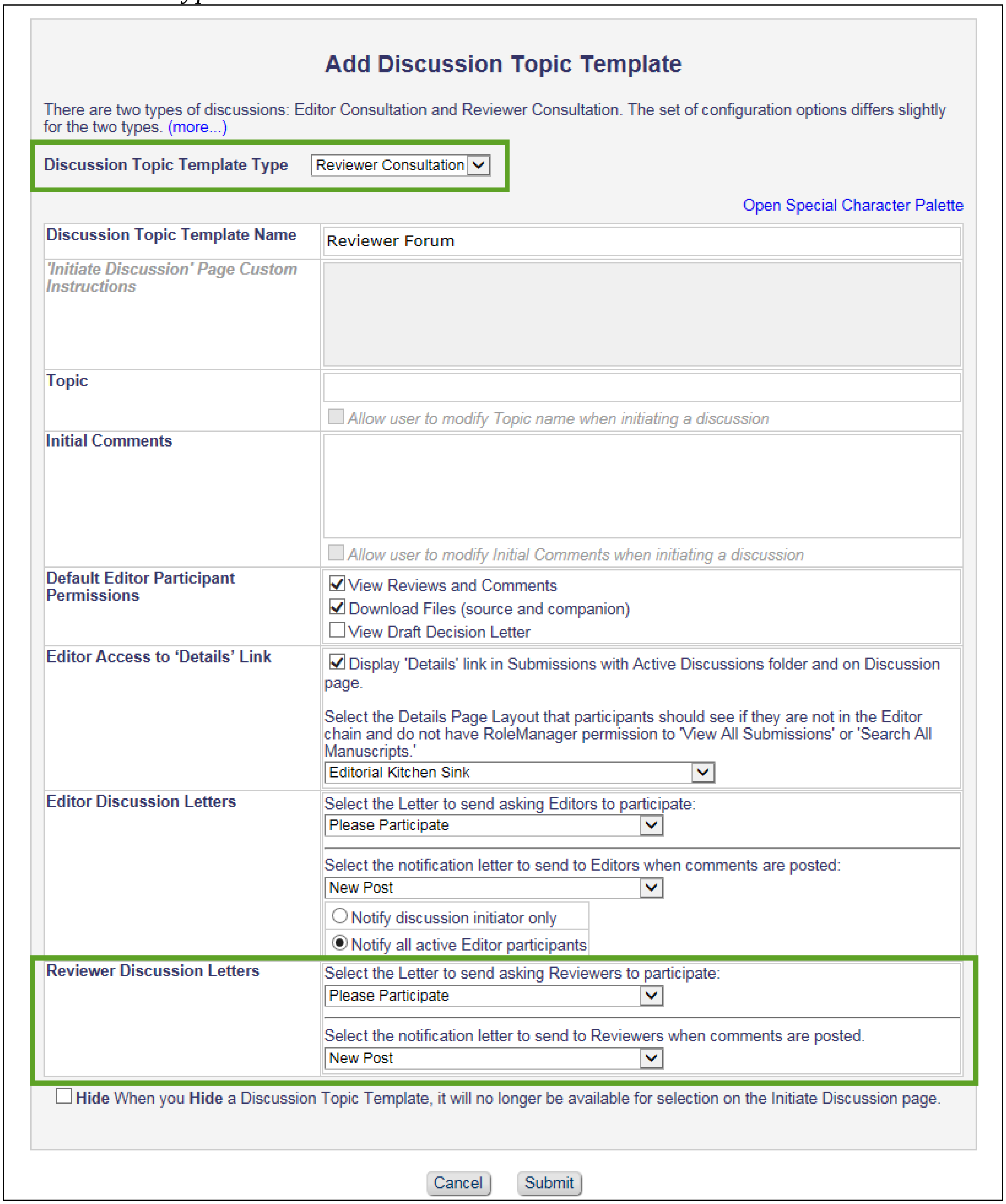
**TO CONFIGURE**:
First, a 'Reviewer Consultation' Topic Template must be configured. In the 'Discussion Forums' section of *PolicyManager*, click the 'Configure Discussion Topic Templates' link. On the 'Configure Discussion Topic Templates' page, click the 'Add' button to add a new template.

*Sample* Configure Discussion Topic Templates *page – a new 'Type' column is added to indicate whether a topic is for Editor or Reviewer discussions*




On the 'Add Discussion Topic Template' page, select 'Reviewer Consultation' from the Discussion Topic Template Type drop down list. Once 'Reviewer Consultation' is selected as the Topic Type, some options that are usually available for Editor Discussions (existing functionality) will be disabled – the initial comments and topic will not be able to be edited when initiating the discussion.

*Sample* Add Discussion Topic Template *page when 'Reviewer Consultation' has been selected as the type*



## Add Discussion Topic Template

There are two types of discussions: Editor Consultation and Reviewer Consultation. The set of configuration options differs slightly for the two types. (more...)

**Discussion Topic Template Type** Reviewer Consultation

Open Special Character Palette

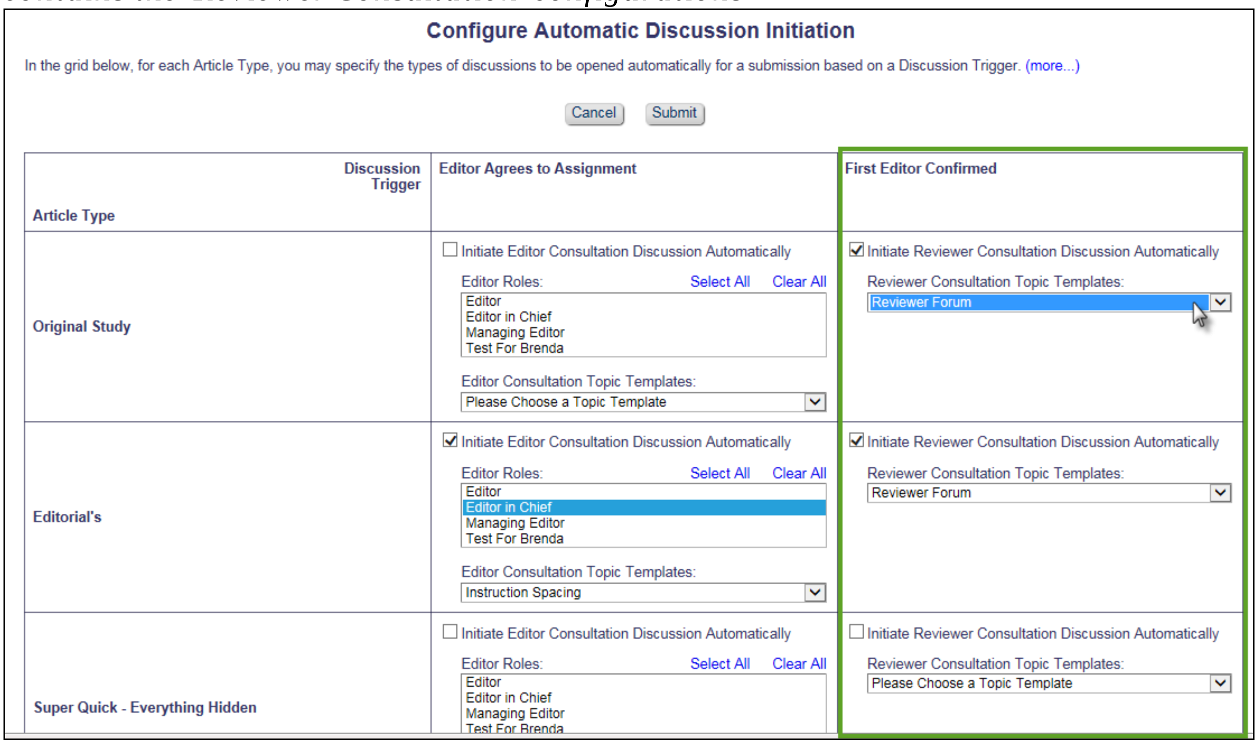
| | |
|---|---|
| **Discussion Topic Template Name** | Reviewer Forum |
| *'Initiate Discussion' Page Custom Instructions* | |
| **Topic** | ☐ *Allow user to modify Topic name when initiating a discussion* |
| **Initial Comments** | ☐ *Allow user to modify Initial Comments when initiating a discussion* |
| **Default Editor Participant Permissions** | ☑ View Reviews and Comments<br>☑ Download Files (source and companion)<br>☐ View Draft Decision Letter |
| **Editor Access to 'Details' Link** | ☑ Display 'Details' link in Submissions with Active Discussions folder and on Discussion page.<br>Select the Details Page Layout that participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts.'<br>Editorial Kitchen Sink |
| **Editor Discussion Letters** | Select the Letter to send asking Editors to participate:<br>Please Participate<br>Select the notification letter to send to Editors when comments are posted:<br>New Post<br>○ Notify discussion initiator only<br>◉ Notify all active Editor participants |
| **Reviewer Discussion Letters** | Select the Letter to send asking Reviewers to participate:<br>Please Participate<br>Select the notification letter to send to Reviewers when comments are posted.<br>New Post |

☐ **Hide** When you **Hide** a Discussion Topic Template, it will no longer be available for selection on the Initiate Discussion page.

Cancel Submit

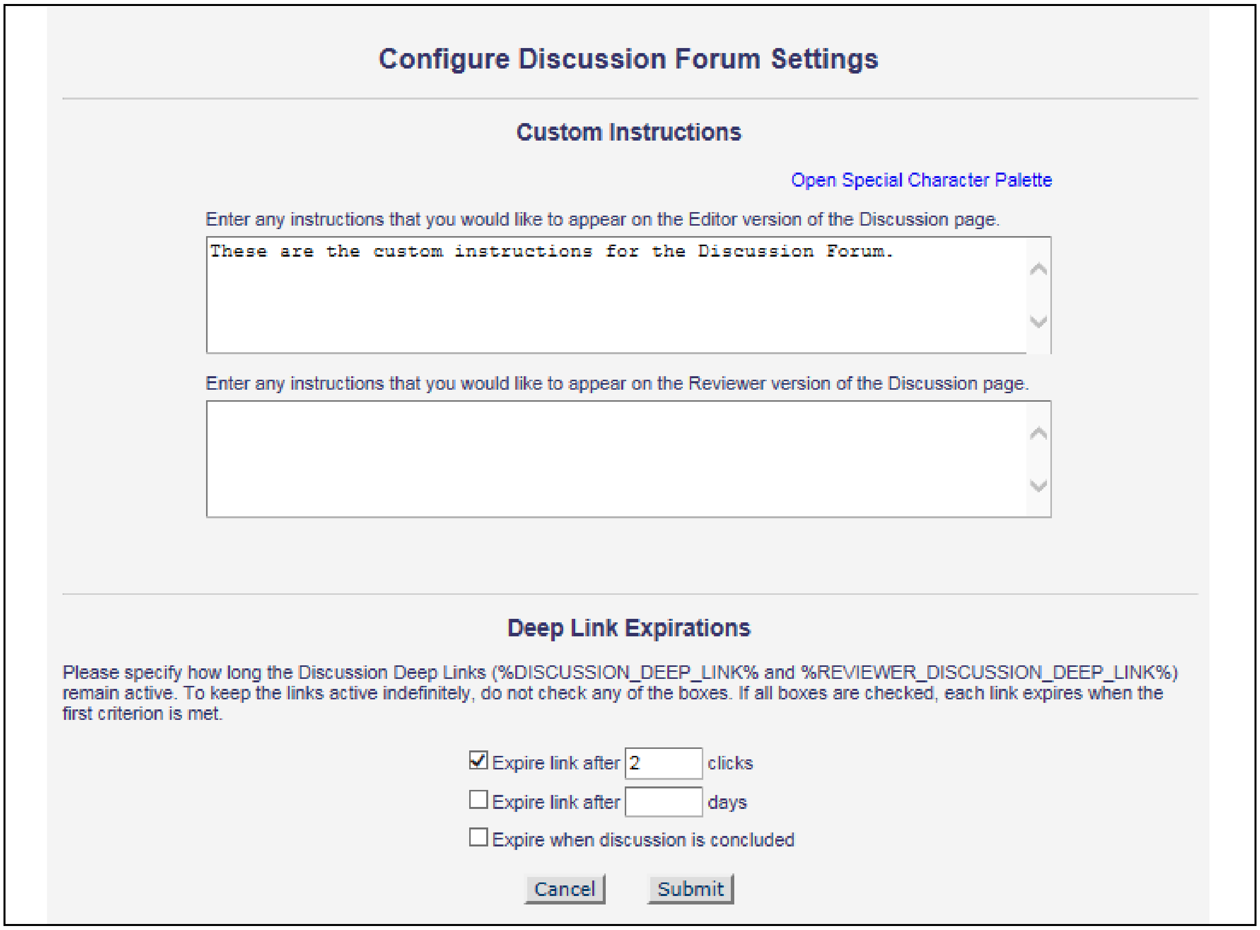
When creating the 'Reviewer Consultation' topic template, users will still be able to select the type of submission access permissions ('View Reviews and Comments', ‘Download Files’, ‘View Draft Decision Letter’, and ‘Details’ page layouts) for Editors who are part of the ‘Reviewer Consultation’ discussion. As with the Editor Discussions, Administrators will also be able to select the letters and notifications sent to Reviewers. After the ‘Reviewer Consultation’ template has been created, Administrators will be able to associate the Reviewer template with Article Types on the ‘Configure Automatic Discussion’ page in *PolicyManager*. From here, Administrators may decide which Article Types use ‘Reviewer Consultation’ and select which ‘Reviewer Consultation’ topic template is used.

*Sample* Configure Automatic Discussion *page – the ‘First Editor Confirmed’ column contains the ‘Reviewer Consultation’ configurations*



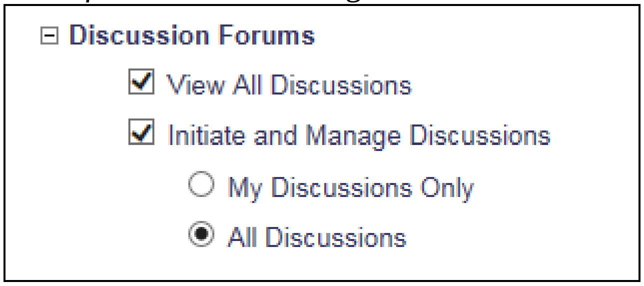

After the ‘Reviewer Consultation’ discussion template has been configured for use with the desired Article Type, the discussion will be automatically initiated when the first Editor is confirmed (assigned or agreed to take the assignment).

Further configuration may be done on the 'Configure Discussion Forum Settings' page in *PolicyManager*. Custom instructions may be entered and Administrators may decide the expiration policy on the existing **%DISCUSSION_DEEP_LINK%** and the new **%REVIEWER_DISCUSSION_DEEP_LINK%**.




To grant Editors permission to manage discussions (add Editor participants, conclude discussion), the select the 'Initiate and Manage Discussions' option in Editor *RoleManager*.

*Part of* Editor RoleManager:



## The PowerGrid

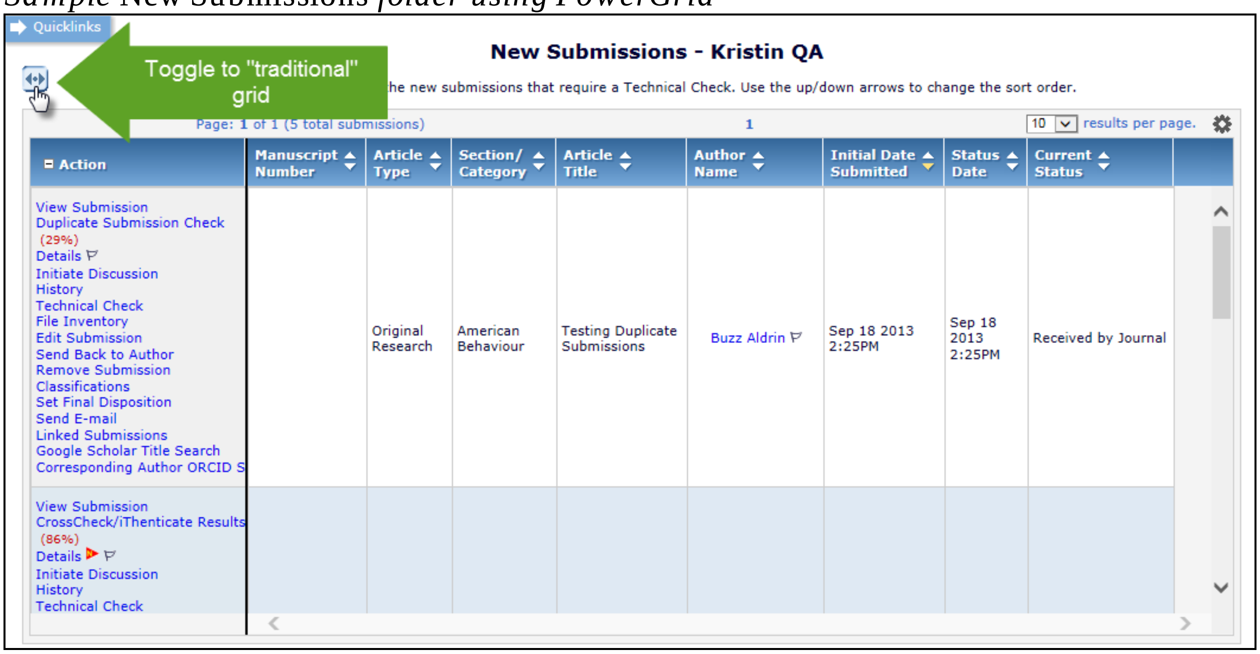
In EM/PM version 12.0 a ‘Beta Grid’ option was added to the ‘Search Submissions Selection Criteria’ page. This feature was selected by default for all publications and applies an updated, interactive grid interface to Search Submissions Results. Users have the option to hide columns they do not want to use, resize the columns, reorder the columns in the grid, and freeze columns so the information stays in place during horizontal scrolling. Additionally, the column headers are fixed so column information is available during vertical scrolling.

New in EM/PM version 12.2, the ‘Beta Grid’ is now a formal feature referred to as the ‘PowerGrid’ and is applied to the following folders on the Editor Main Menu:

- ‘New Submissions’
- ‘Revised Submissions’
- ‘New Submissions Requiring Assignment’
- ‘Revised Submissions Requiring Assignment’
- ‘View All Assigned Submissions’
- ‘View All Assigned Submissions with Editors Invited – None Yet Assigned’

The PowerGrid is turned on by default for all of the folders listed above. An button underneath the ‘Quicklinks’ menu in the upper left corner of the PowerGrid toggles the user back to the “traditional” EM grid.

*Sample* New Submissions *folder using PowerGrid*




Also new for the PowerGrid in 12.2 is the ability for a Saved Search to also save the user’s layout preference (PowerGrid only). Users accessing a shared search for the first time will have the results loaded into the search creator’s layout preference. Users who opt out of the PowerGrid on the ‘Search Submissions Selection Criteria’ page, however, will see the results in the traditional grid, per their preference.

### TO CONFIGURE:

No configuration necessary. The PowerGrid is turned on upon upgrade for the specified folders on the Editor Main Menu.

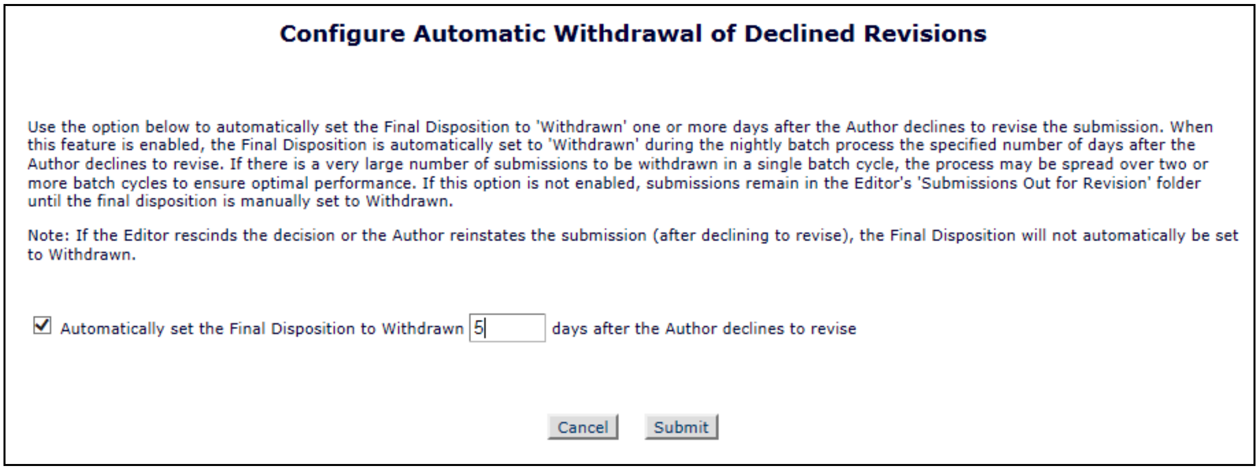
## Automatic Withdrawal of Declined Revisions

In EM version 12.1, an Author may choose to decline to revise a submission. If the Author declines to revise, the submission will remain in the Editor's 'Submissions Out for Revision' folder indefinitely until an Editor either rescinds the decision or manually sets a Final Disposition to 'Withdrawn'. This creates a potentially inefficient and confusing folder, since both declined revisions and legitimate revisions-in-progress are displayed here.

New in EM version 12.2, publications may have the Final Disposition automatically set to 'Withdrawn' after a set number of days on submissions where an Author has declined to revise. When the Final Disposition is set automatically set to 'Withdrawn', the submission moves out of the 'Submissions Out for Revision' folder and into the 'All Submissions with Final Disposition (Withdrawn)' folder, just like when the Final Disposition is set to 'Withdrawn' manually. This is done through a new page in *PolicyManager*: 'Configure Automatic Withdrawal of Declined Revisions'.

**TO CONFIGURE**:
Go to the new 'Configure Automatic Withdrawal of Declined Revisions' page in *PolicyManager* under the 'Editor Decision Policies' subheading:

Once on the page, select the checkbox and enter the desired amount of time after an Author has declined to revise that the Final Disposition will be automatically set to 'Withdrawn'.



## Submission Flag History

In EM version 12.1, publications may use Submission Flags to supplement their Editorial and Production workflows. Some publications might use the Submission Flags to mark important milestones in the submission workflow or indicate that a submission may need attention.

In EM version 12.2, Submission Flag History is recorded for each submission (depending on the individual flag configuration). The Flag History will record and show when each flag was turned on and off for the submission. A new *RoleManager* permission – 'View Submission Flag History' – is required to view historical flag information in the interface.

Once enabled, a Submission Flag History section is added to the following pages:

- Correspondence History
- Submission Flags pop-up
- Flag legend pop-up

The Submission Flag History shows each flag icon (and flag description) that has ever been turned on for the manuscript. The following additional information is also shown:

- The revision number of the submission when flag was turned on.
- The date the flag was turned on and the operator who turned it on.
- The date the flag was turned off (if it has been turned off) and the operator name who turned it off.
- The number of days the flag was turned on. If the flag is still being used, the number is displayed in parentheses and in red text to indicate the elapsed number of days.
- Additionally:
  - Only flags configured to 'Display in History' are shown in the interface. However, the flag history is captured in the database for all submission flags once the journal upgrades to version 12.2.
  - If the flag is turned on/off multiple times, each occurrence is captured and displayed in a separate row.
  - Flags that have never been associated with the manuscript are not shown, to avoid cluttering the page.
  - The flag description is written into the Flag History as text, in case the flag description is ever changed in the future.
  - If a user was proxying for another user when turning the flag on or off, it is designated as such in the grid.

*Sample Correspondence History page – Submission Flag History has been enabled in* PolicyManager *and the user has permission to view the flag history*

**History for Manuscript Number: ARIES-D-14-57316**
**"Super Cool Article"**

Status History  Correspondence History  Submission Flag History

Switch to Status Type View

Close

**STATUS HISTORY**

| Status Date | Document Status | Edit Submission Status | Production Status | Status Days | Role Family | Revision | Operator |
|---|---|---|---|---|---|---|---|
| Jan 15 2015 2:18PM | Under Review | | | ---- | REVIEWER | 0 | Stacey Lavelle |
| Jan 15 2015 2:18PM | Decision Rescinded | | | ---- | EDITOR | 0 | Stacey Lavelle |
| Jan 14 2015 6:26AM | Completed Reject | | | 1 | EDITOR | 0 | Rebecca Klahm |
| Jan 14 2015 6:26AM | Reject | | | ---- | REVIEWER | 0 | Rebecca Klahm |
| Jan 14 2015 2:52AM | Under Review | | | ---- | REVIEWER | 0 | Joe Carrino |
| Jan 14 2015 2:35AM | Decision in Process | | | ---- | REVIEWER | 0 | Joe Carrino |
| Jan 5 2015 5:19PM | Under Review | | | 8 | REVIEWER | 0 | Joe Carrino |
| Dec 29 2014 7:35PM | Editor Assigned | | | 6 | EDITOR | 0 | Joe Carrino |
| Dec 29 2014 7:38AM | | Incomplete with Editor | | ---- | EDITOR | 0 | Ed Office |
| Dec 22 2014 1:57AM | Manuscript Submitted | | | 7 | EDITOR | 0 | Macy Jackson |
| Dec 22 2014 1:48AM | Needs Approval | | | ---- | AUTHOR | 0 | Macy Jackson |
| Dec 22 2014 1:47AM | Building PDF | | | ---- | AUTHOR | 0 | Macy Jackson |
| Dec 22 2014 1:24AM | Incomplete | | | ---- | AUTHOR | 0 | Macy Jackson |

**CORRESPONDENCE HISTORY**

| Correspondence Date | Letter | Recipient | Status | Revision | Operator |
|---|---|---|---|---|---|
| Jan 21 2015 12:05AM | Reviewer Reminder - (2) Before Due Date | Viggo Dunst, Ph.D. | Under Review | 0 | Tara Barcello |
| Jan 15 2015 2:18PM | Author Notice Decision Rescinded | Macy Jackson | Under Review | 0 | Stacey Lavelle |
| Jan 14 2015 6:26AM | Reviewer Notification of Reject Decision | Brian K Hammer, PhD | Completed Reject | 0 | Rebecca Klahm |
| Jan 14 2015 6:26AM | Editor Decision - Reject | Macy Jackson | Reject | 0 | Klahm |

**SUBMISSION FLAG HISTORY**

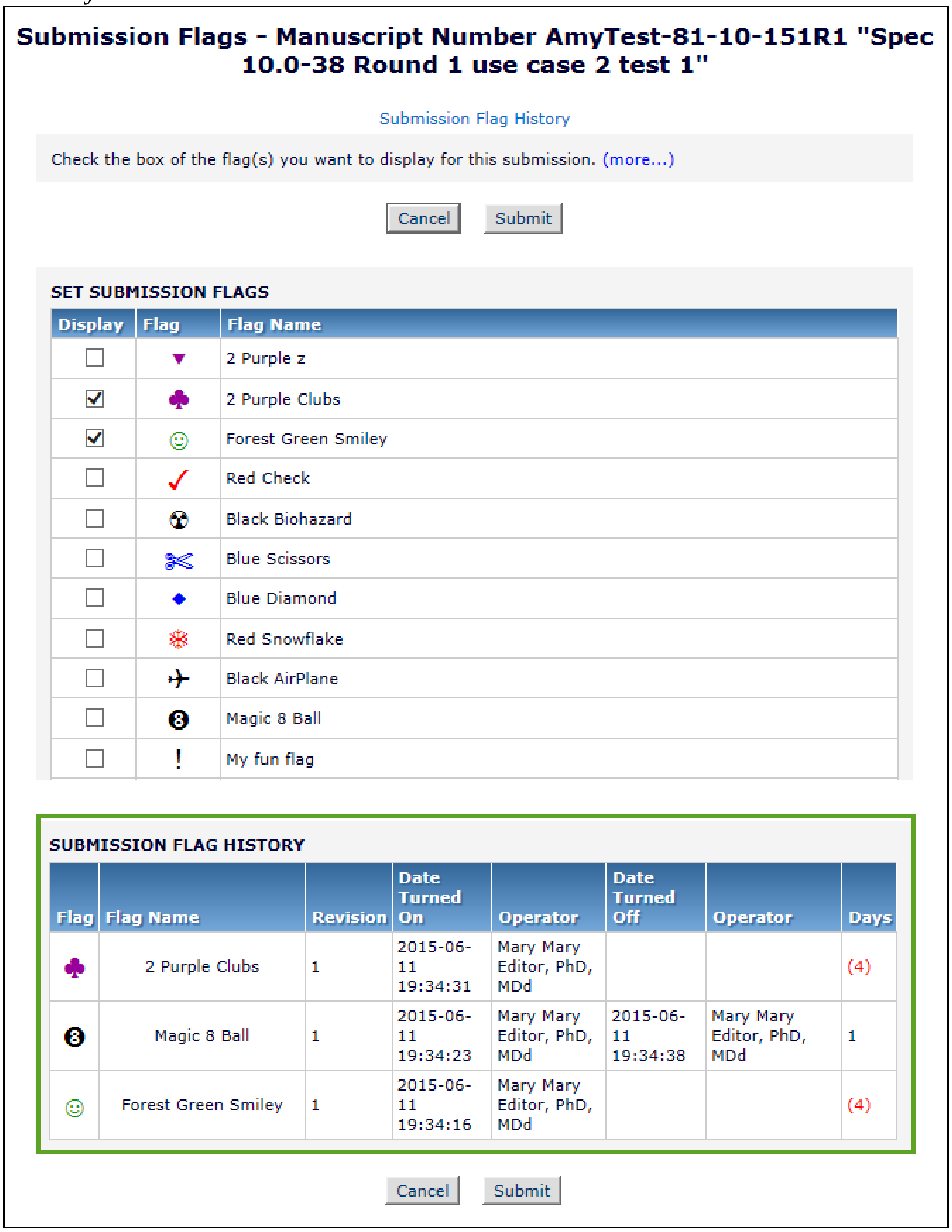
| Flag | Flag Name | Revision | Date Turned On | Operator | Date Turned Off | Operator | Days |
|---|---|---|---|---|---|---|---|
| X | Subscan Complete | 1 | Jan 28, 2015 3:35 PM | James Miller, PhD | | | (6) |
| ! | Potential Subscan Issue | 1 | Jan 25, 2015 2:00 PM | James Miller, PhD | Jan 28, 2015 11:12 AM | Stacey Lavelle | 3 |
| 2 | Ed Office, Rebecca Bye | 1 | Jan 25, 2015 11:40 AM | Rebecca Bye | | | (9) |
| | Open subscan discussion | 1 | Jan 16, 2015 8:29 AM | Xianchun Wang, PhD | Feb 3, 2015 12:00 PM | Xianchun Wang PhD | 18 |
| ! | Potential Subscan Issue | 0 | Dec 17, 2014 2:00 PM | James Miller, PhD | Dec 23, 2015 11:12 AM | James Miller, PhD | 6 |
| | Sent Back to Authors | 0 | Nov 13, 2014 10:13 AM | Rebecca Bye | Nov 18, 2014 11:00 AM | Rebecca Bye | 5 |

Close

Status History  Correspondence History  Submission Flag History

Switch to Status Type View

*Sample Submission Flags pop-up – user has permission to view Submission Flag History*



**Submission Flags - Manuscript Number AmyTest-81-10-151R1 "Spec 10.0-38 Round 1 use case 2 test 1"**

Submission Flag History

Check the box of the flag(s) you want to display for this submission. (more...)

Cancel Submit

SET SUBMISSION FLAGS

| Display | Flag | Flag Name |
|---|---|---|
| ☐ | | 2 Purple z |
| ☑ | | 2 Purple Clubs |
| ☑ | | Forest Green Smiley |
| ☐ | | Red Check |
| ☐ | | Black Biohazard |
| ☐ | | Blue Scissors |
| ☐ | | Blue Diamond |
| ☐ | | Red Snowflake |
| ☐ | | Black AirPlane |
| ☐ | | Magic 8 Ball |
| ☐ | ! | My fun flag |

SUBMISSION FLAG HISTORY

| Flag | Flag Name | Revision | Date Turned On | Operator | Date Turned Off | Operator | Days |
|---|---|---|---|---|---|---|---|
| | 2 Purple Clubs | 1 | 2015-06-11 19:34:31 | Mary Mary Editor, PhD, MDd | | | (4) |
| | Magic 8 Ball | 1 | 2015-06-11 19:34:23 | Mary Mary Editor, PhD, MDd | 2015-06-11 19:34:38 | Mary Mary Editor, PhD, MDd | 1 |
| | Forest Green Smiley | 1 | 2015-06-11 19:34:16 | Mary Mary Editor, PhD, MDd | | | (4) |

Cancel Submit

The 'Submission Flags' pop up interface is accessed by a user with appropriate permission clicking the 'Set Flag' icon ( ), any flag currently associated with a submission on the 'Details' page, or the 'Add/Edit Submission Flags' link on the 'Details' page.

The 'Flag Legend' page is available for users who are able to view flags, but do not have permission to turn Submission Flags on or off. If the user also has the new 'View Submission Flag History' permission, they will be able to see historical flag data on the 'Flag Legend' page.

*Sample 'Flag Legend' page for user with permission to View Submission Flags and Submission Flag History*

## Flag Legend

Submission Flag History

Close

**SEELCTED SUBMISSION FLAGS**

| Flag | Flag Name |
|---|---|
| | 2 Purple Clubs |
| | Forest Green Smiley |

**SUBMISSION FLAG HISTORY**

| Flag | Flag Name | Revision | Date Turned On | Operator | Date Turned Off | Operator | Days |
|---|---|---|---|---|---|---|---|
| | 2 Purple Clubs | 1 | 06/11/2015 19:34:31 | Mary Mary Editor, PhD, MDd | | | (4) |
| | Magic 8 Ball | 1 | 06/11/2015 19:34:23 | Mary Mary Editor, PhD, MDd | 2015-06-11 19:34:38 | Mary Mary Editor, PhD, MDd | 1 |
| | Forest Green Smiley | 1 | 06/11/2015 19:34:16 | Mary Mary Editor, PhD, MDd | | | (4) |

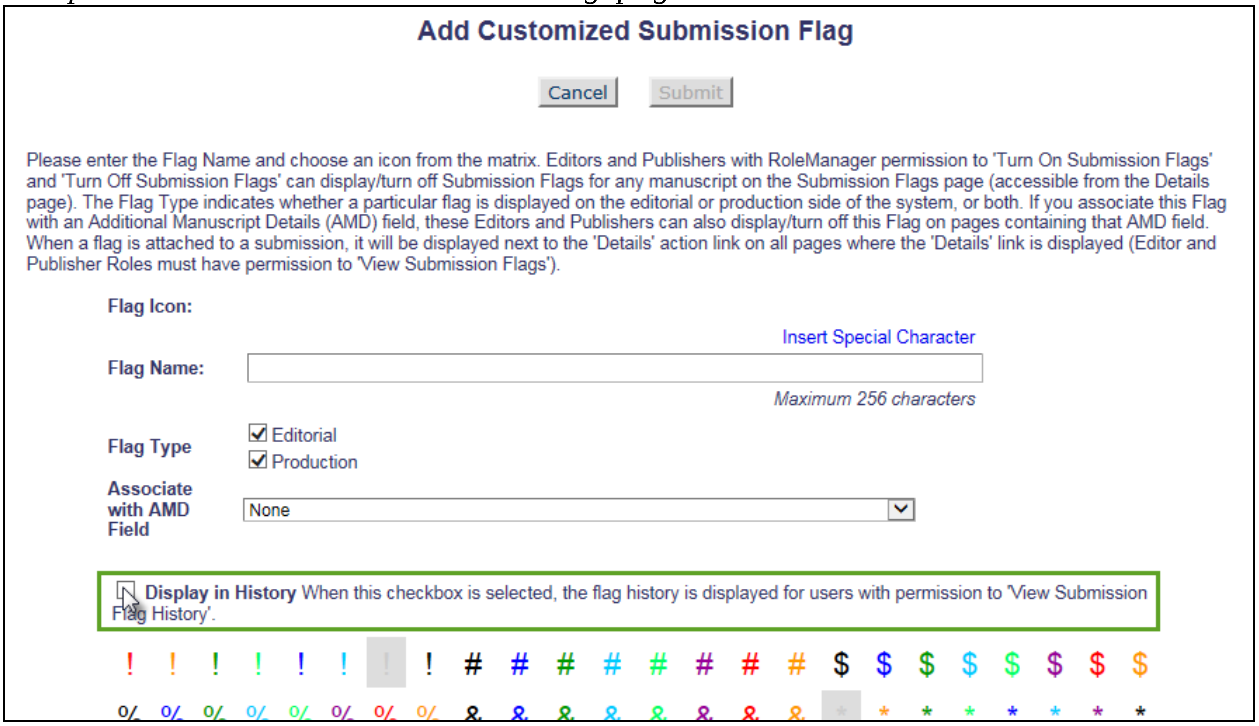
Close

The 'Assigned Custom Flags' table (CUSTOM_FLAG_ASSIGNMENT) will record when a flag is turned on or off for reporting purposes.

**TO CONFIGURE**:
To turn on the Submission Flag History display, each desired Submission Flag must be individually selected to be included. On the 'Add/Edit Customized Submission Flag' page (accessed by clicking the 'Add' button or editing an existing flag on the 'Create

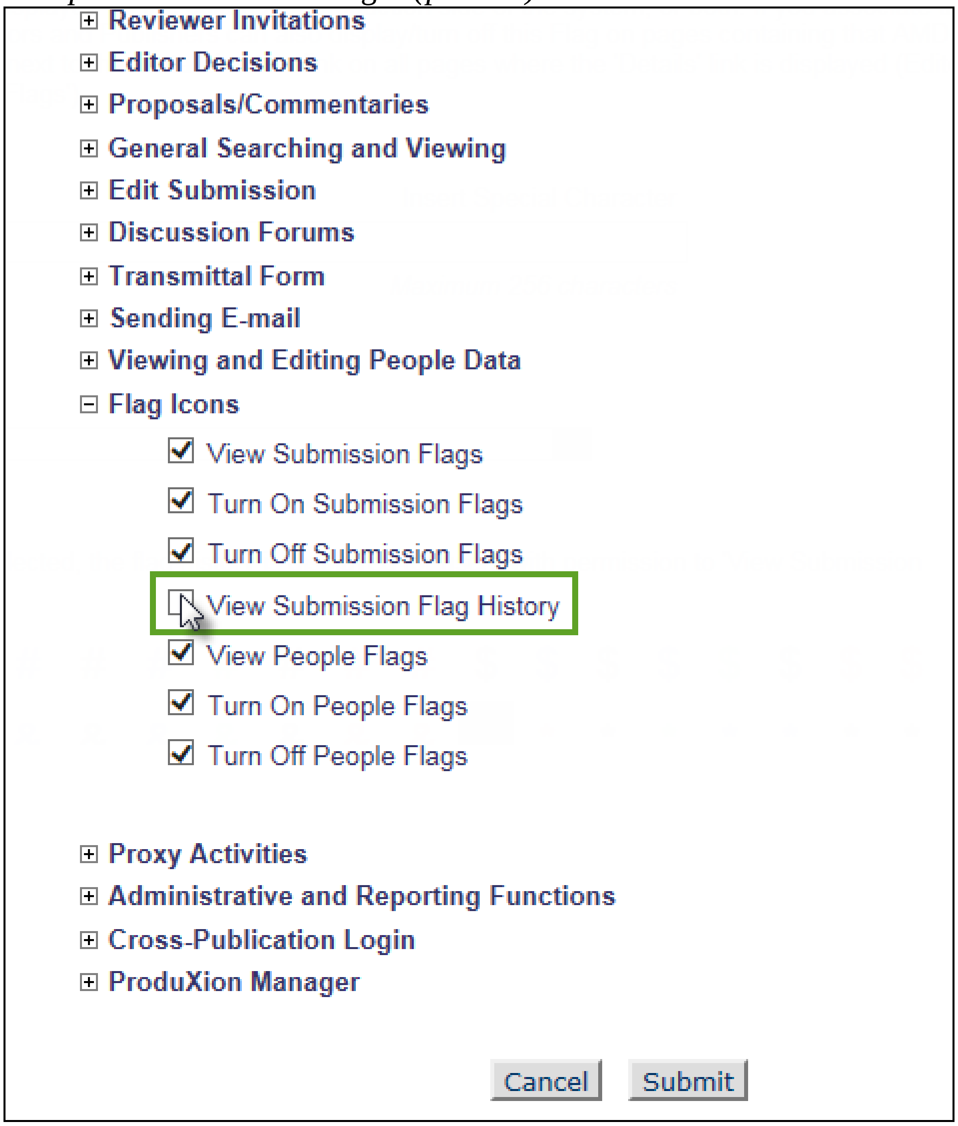
Customized Submission Flags’ page in *PolicyManager*), select the ‘Display in History’ checkbox for the flags you wish to display in the interface.

*Sample ‘Add Customized Submission Flag’ page*

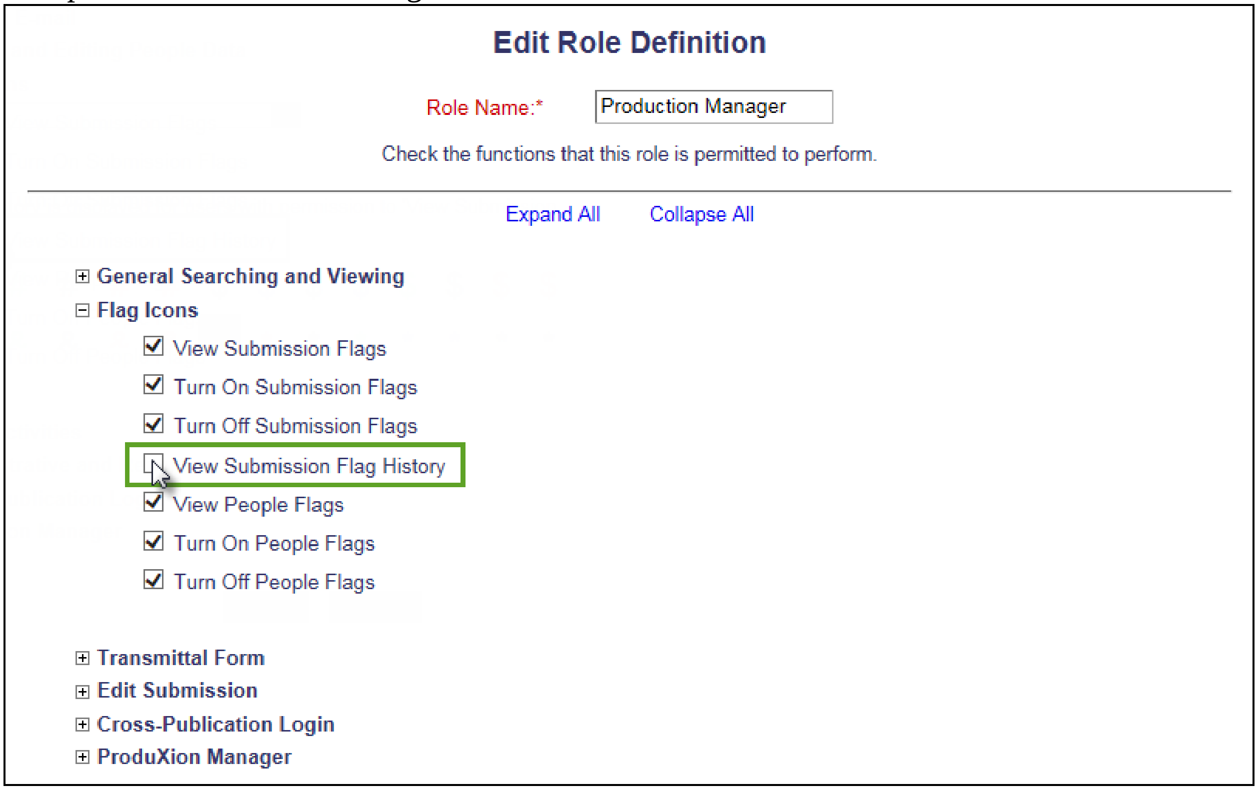



To view the Submission Flag History, the user must have the new ‘View Submission Flag History’ permission enabled in Editor or Publisher *RoleManager*.

*Sample* Editor RoleManager *(partial)*



*Sample* Publisher RoleManager



## Ad Hoc E-mail Enhancements

In EM/PM version 12.1, users may send ad hoc e-mails to users associated with a submission. The ad hoc e-mails must be configured as templates in 'Edit Letters' prior to sending with defined recipients and senders. To send an ad hoc e-mail, users must click the 'Send E-mail' link and select from a list of the pre-configured letters.

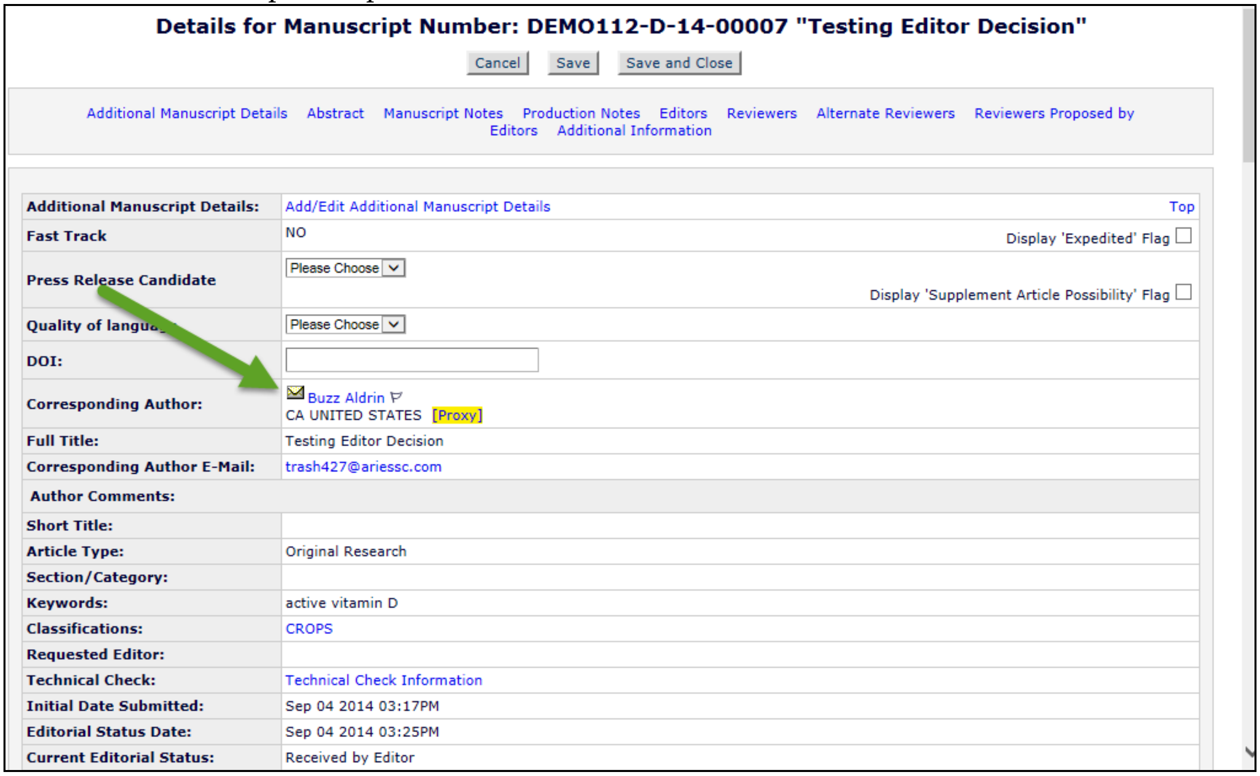
New in EM/PM version 12.2, an envelope icon () is added next to people names on the 'Details' page for Editors & Publishers to give users a more convenient way to send ad hoc letters to people associated with a submission.

After clicking the envelope icon on the 'Details' page, the user will be presented with all letters in the appropriate ad hoc family that have been configured to use the new Recipient option on the 'Edit Letters' page in *PolicyManager*: 'User Selects Recipient using icon'. If there is only one letter configured for use with this option, the user will be brought to the 'Customize Letter' interface.

NOTE: Letters configured with the 'User Selects Recipient using icon' may also show in the ad hoc letter drop down list when the 'Send E-mail' action link is clicked in folders. This only applies when there are one or more Recipients options selected in addition to 'User Selects Recipient using icon'.

NOTE: If 'User Selects Recipient using icon ' is the only Recipient option selected for a letter, the letter is available via the new icon, but is not available via the 'Send E-mail' link.

*Sample 'Details' page – a letter in the Ad Hoc From Editor family has been configured to use the new recipient option*



**Details for Manuscript Number: DEMO112-D-14-00007 "Testing Editor Decision"**

Cancel | Save | Save and Close

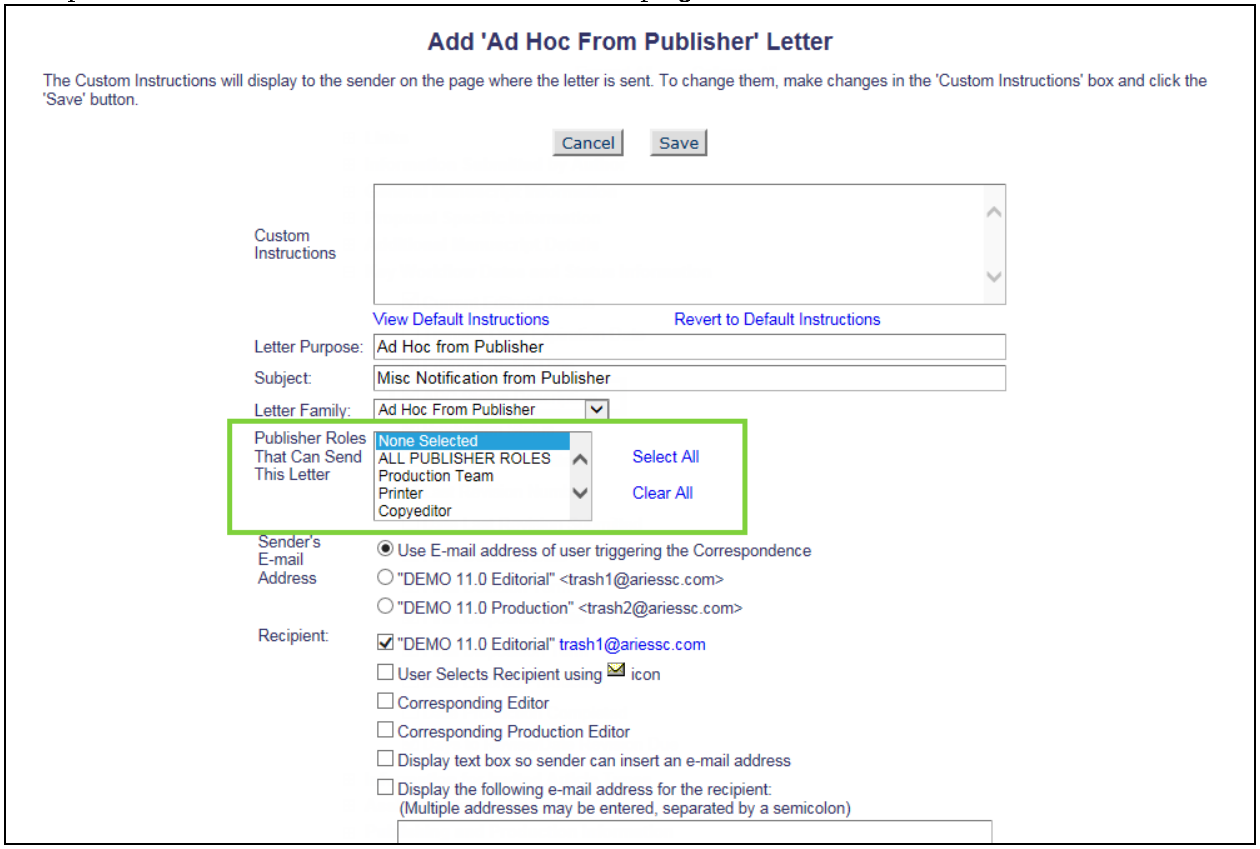
Additional Manuscript Details | Abstract | Manuscript Notes | Production Notes | Editors | Reviewers | Alternate Reviewers | Reviewers Proposed by Editors | Additional Information

| | |
|---|---|
| **Additional Manuscript Details:** | Add/Edit Additional Manuscript Details Top |
| **Fast Track** | NO Display 'Expedited' Flag |
| **Press Release Candidate** | Please Choose Display 'Supplement Article Possibility' Flag |
| **Quality of langu…** | Please Choose |
| **DOI:** | |
| **Corresponding Author:** | Buzz Aldrin CA UNITED STATES [Proxy] |
| **Full Title:** | Testing Editor Decision |
| **Corresponding Author E-Mail:** | trash427@ariessc.com |
| **Author Comments:** | |
| **Short Title:** | |
| **Article Type:** | Original Research |
| **Section/Category:** | |
| **Keywords:** | active vitamin D |
| **Classifications:** | CROPS |
| **Requested Editor:** | |
| **Technical Check:** | Technical Check Information |
| **Initial Date Submitted:** | Sep 04 2014 03:17PM |
| **Editorial Status Date:** | Sep 04 2014 03:25PM |
| **Current Editorial Status:** | Received by Editor |

To allow publications to set up a 'blank' letter template (no Subject, empty body) for 'User Selects Recipient using icon' letters, users are now able to save templates with an empty subject line. The ability to save a letter template without a subject line has been extended to all Letter Families.

Additionally, the 'Ad Hoc from Publisher' letter template page has been enhanced to display a 'Publisher Roles That Can Send This Letter' option. This is a multi-selector box containing all Publisher Roles and similar to the existing 'Editor Roles That Can Send This Letter' selector box available for 'Ad Hoc from Editor' letters. The default at upgrade for existing letters is 'ALL PUBLISHER ROLES', and defaults to 'None Selected' when adding a new letter.

*Sample* Add 'Ad Hoc From Publisher' Letter' *page*




**TO CONFIGURE**:

Ad hoc letters must either be in the 'Ad Hoc from Editor' or 'Ad Hoc from Publisher' family to be eligible for use with this feature. Each letter to be used with the icon must be configured in 'Edit Letters' to use the recipient option 'User Selects Recipient using icon'. Also, the Editor or Publisher Role must have (existing) permission to 'Send Ad Hoc E-mail'.

*Sample 'Ad Hoc from Editor' letter template in* PolicyManager>'*Edit Letters*'

Edit 'Ad Hoc From Editor' Letter

HTML formatting tags may be used. It is not necessary to use the <HTML> or <BODY> tags.

Cancel | Preview Letter | Save

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

View Default Instructions | Revert to Default Instructions

Letter Purpose: Copyright Transfer Request

Subject: Copyright Transfer Request

Letter Family: Ad Hoc From Editor

Editor Roles That Can Send This Letter: None Selected / ALL EDITOR ROLES / Managing Editor / Editor-in-Chief / Associate Editor

Select All

Clear All

Sender's E-mail Address:
- Use E-mail address of user triggering the Correspondence
- "DEMO 11.0 Editorial" <trash1@ariessc.com>
- "DEMO 11.0 Production" <trash2@ariessc.com>

Recipient:
- "DEMO 11.0 Editorial" trash1@ariessc.com
- User Selects Recipient using icon
- Corresponding Editor
- Corresponding Production Editor

## *ActionManager* Events Column for Edit Letters

In EM/PM version 12.1, Administrators cannot quickly review how letters have been configured for use with different Roles under *ActionManager;* either they must review the *ActionManager* configuration for each Role in turn, or click the 'Remove' or 'Hide' links in the 'Edit Letters' grid to trigger a warning that lists all *ActionManager* associations.

New in EM/PM version 12.2, a new 'ActionManager Roles and Events' column is added to the 'Edit Letters' grid in *PolicyManager*. The column will list the Roles in *ActionManager* currently using the letter template as well as the event for which the letter is configured. Each Role is displayed as a link to the respective *ActionManager* table. Clicking the link will navigate the user away from the 'Edit Letters' grid and into that Role's *ActionManager* event table.

In this release, only ActionManager Events are listed – the page does not list any Decision Terms that are linked to letters; those can be reviewed in one place under *PolicyManager>Edit Editor Decision Terms.*

*Sample 'Edit Letters' grid in* PolicyManager

## Edit Letters

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

Back to PolicyManager

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

| Letter Purpose | Letter Family Group by: | ActionManager Roles and Events | Letter Format: Text | | Letter Format: Rich Text (HTML) | | All Formats |
|---|---|---|---|---|---|---|---|
| Editor Declines to Handle Assignment | General | Editor - Editor Declines Invitation from an Editor<br>Editor in Chief - Editor Declines Invitation from an Editor<br>Managing Editor - Editor Declines Invitation of New Submission<br>Managing Editor - Editor Declines Invitation from an Editor | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Initiate Author Rebuttal | General | Author - Rescind Decision<br>Author - Initiate Rebuttal<br>Managing Editor - Rescind Decision | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Invitation | Invite/Assign/Unassign Editor | Editor - Editor Invited for Assignment | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Notice All Reviews Complete | General | Editor - Required Reviews Complete<br>Editor in Chief - Required Reviews Complete | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Notice an Assignment was Undone | Invite/Assign/Unassign Editor | Editor - Editor Unassigned Notification<br>Editor in Chief - Editor Unassigned Notification<br>Managing Editor - Editor Unassigned Notification | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Notice Author Agrees to Assignment | General | Editor - Author Agrees to Invitation<br>Editor in Chief - Author Agrees to Invitation<br>Managing Editor - Author Agrees to Invitation | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Notice Author Approve Changes | General | Editor - Author Returns Submission to Publication<br>Editor in Chief - Author Returns Submission to Publication<br>Managing Editor - Author Returns Submission to Publication | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Notice Author Declines Assignment | General | Editor - Author Declines Invitation<br>Editor in Chief - Author Declines Invitation<br>Managing Editor - Author Declines Invitation | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Notice Completed Review | General | Editor - Late Review | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Notice Reviewer Agrees to Review | General | Editor - Reviewer Agree<br>Editor in Chief - Reviewer Agree | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor Notice Reviewer Declines to Review | General | Editor - Reviewer Decline<br>Editor in Chief - Reviewer Decline | ◉ | Edit | ○ | Edit | Remove \| Hide |
| Editor PDF Build Error | General | Editor - Editor PDF Build Error<br>Editor in Chief - Editor PDF Build Error<br>Managing Editor - Editor PDF Build Error | ◉ | Edit | ○ | Edit | Remove \| Hide |

**TO CONFIGURE:**

No configuration necessary.

## View Publication Charges Data Permissions

In EM/PM version 12.1 publications may present Corresponding Authors with a processing or publication charge at the time of submission. With Editorial Manager, these charges may be handled by an external payment system that has been fully integrated into the submission process. A letter may be sent to the Author when the 'Payment Due' event is triggered. It can include a deep linking merge field **(%APC_EXTERNAL_LINK%)** that displays a link to the URL used to access the Payment page in the external Payment System. If an Editor, Publisher, or Reviewer who has access to the History page goes to the Correspondence History grid on that page, and can view this letter, they can copy and paste this link into a browser's address bar, which allows them to see sensitive information about the amount the Author is being charged for the submission.

Additionally, if the Payment Due API is triggered for a submission that an Author chose to submit as 'Open Access' (publication charges will be collected), the system displays Publication Charges status icons and descriptions in various folders and pages. Currently, all Editors/Publishers with permission to access those folders and pages can view these status icons and descriptions.

New in EM/PM version 12.2, two new *RoleManager* permissions are added for Editors and Publishers: "**View Publication Charges Status**" & "**View Publication Charges Correspondence and Links**". These permissions allow publications to control Publication Charges information visibility within Editorial Manager. Additionally, a new "Publication Charges" Letter Family is added to *PolicyManager*.

NOTE: Upon upgrade, all existing letter templates that are currently configured to be sent for the two ActionManager events related to Publication Charges ('Publication Charges Payment Requested' & 'Publication Charges Payment Complete') are converted from their current letter family (most likely the 'General' letter family) to the new 'Publication Charges' letter family.

NOTE: After upgrade, the Reviewer version of the Correspondence History will suppress all letters in the Publication Charges family at all times.

The "**View Publication Charges Status**" permission enables the display of the Publications Charges status icons and/or the Publication Charges Status section of various folders and pages. When this permission is turned on for an Editor or Publisher (and they have access to a Publication Charges Submission), the Publication Charges Status will be displayed in the following places:

- Custom Details
- Transmittal Form
- All Submissions with Editor's Decision
- My Assignments with Decision
- All Submissions with Final Disposition Accept
- All Completed Conference Submissions

- Accepted Submissions
- Search Submissions – Search Results
- Submission Tasks Assigned to Me
- Submission Tasks I Have Assigned
- View All Submissions in Production
- Production Status Grid
- Production Initiated – No Tasks Assigned
- View All Production Tasks with Authors
- View All Submissions with Production Completed

The "**View Publication Charges Correspondence and Links**" permission enables the display of letters in the 'Publication Charges' letter family on the Correspondence History page. Additionally, Editors and Publishers with this permission will be able to access relevant Publication Charges links and correspondence while proxying as an Author.

NOTE: If the user does not have the 'View Publications Charges Correspondence and Links' permission, they will still be able to receive letters and view  in the Publication Charges family if they are the primary recipient.

The **%APC_EXTERNAL_LINK%** deep-linking merge field is enhanced in version 12.2 to accommodate the new permissions: Only the original recipients of letters can view the deep link in the sent letter and the plain text of the URL when viewed from the Correspondence History.

TO CONFIGURE:
Editorial Manager's integration with Publication Charges processing must already be enabled by your Account Coordinator to use these new permissions.

The two new permissions are located in the 'General Searching and Viewing' sections of the Editor and Publisher *RoleManager* pages.

*Sample Editor* RoleManager *page*

## Edit Role Definition

Role Name:* Managing Editor

*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**
⊞ **Editor Assignment**
⊞ **Reviewer Invitations**
⊞ **Editor Decisions**
⊞ **Proposals/Commentaries**
⊟ **General Searching and Viewing**

Use Editorial Details Layout: Editorial Details for Managing Editor

- [x] Search All Manuscripts
- [ ] Search Only Assigned Manuscripts
- [x] Share Saved Searches
- [x] View Linked Submission Groups
  - [x] Create/Edit Linked Submission Groups
    - [x] Set Active/Inactive Status on Linked Submission Groups
    - [ ] Enable Review Sharing for Linked Submission Groups
- [ ] View COS Scholar Universe Author Profiles
- [ ] Search Similar Articles in MEDLINE
- [ ] Search Author Publications in MEDLINE
- [x] Initiate Similarity Check
- [x] View Similarity Check Results
- [x] View Duplicate Submission Check Results
- [x] View Publication Charges Status

Bibliographic Search

- [ ] Google Scholar
- [ ] ScholarUniverse - Author Search (MaxPrecise)
- [ ] ScholarUniverse - Author Search

- [x] View Editorial Status History
- [x] View Submission Production Status History
- [x] View Submission Production Task Assignment History
- [x] View Schedule Group Production Task Assignment History
- [x] View Editorial Correspondence History
  - [x] Edit Letter when Resending
- [x] View Publication Charges Correspondence and Links
- [x] View Submission Production Correspondence History
- [x] View Schedule Group Production Correspondence History
- [x] Add/Edit External Correspondence
  - [x] Add Attachments to External Correspondence
- [x] View All Submissions

**Rest of page unchanged**

Cancel    Submit

Upon upgrade, all existing letters associated with the two ActionManager events related to Publication Charges (‘Publication Charges Payment Requested’ & ‘Publication Charges Payment Complete’) will be converted to the new ‘Publication Charges’ letter family. To ensure the proper display/restriction of access to Publications Charges-related correspondence, all new letters for this feature should be configured in the ‘Publication Charges’ letter family.

*Sample* Add Letter *page*