

CONFIDENTIAL AND PROPRIETARY

Release Notification

 **Editorial Manager[®]**

 **ProduXion Manager[®]**

 **Commerce Manager[™]**

Editorial Manager/ProduXion Manager

13.0 General Release Notification

06/15/2016

Draft – Subject to Change

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Document Change Log

Date	Version	Change
03/18/16	Beta Release	Beta version
06/15/16	Gamma & GR	Proposal enhancements added Books Supplement added

Editorial Manager/ProduXion Manager 13.0 Release Notification

GENERAL ENHANCEMENTS	1
Restrict File Types for Submission Items.....	1
CRedit Taxonomy for Authors.....	7
Reporting.....	12
Transmittals.....	12
Submission Transfers.....	13
Required Reviews Reset Event.....	22
Editor Access to Reviewer PDF.....	25
Upload Author List File (ALF) for Invited Submission Workflows.....	30
Enhanced Author List Change Visibility.....	35
Enhanced Security for Files Downloaded from PDF.....	39
Customized PDF Build Page Text.....	41
Customized PDF Watermarks.....	43
PowerGrid Added to Additional Areas.....	46
Proxy as User after Proxy Registration.....	47
Customizable Funding Information Checkbox Text.....	48
checkCIF Integration.....	50
PolicyManager	53
RoleManager.....	56
IMPORT ENHANCEMENTS	61
ScholarOne Import to ProduXion Manager.....	61
ScholarOne Import to Transferred Submissions Folder.....	62
PUBLICATION CHARGES PROCESSING ENHANCEMENTS	63
Enhanced Resend Payment Request Availability.....	63
Trigger Payment Due in Production.....	65
Send Additional Metadata to Payment System via Custom Metadata ID.....	72
Custom Questions.....	73
Additional Manuscript Details.....	75
Publication Charges Processing for 'Editor Use Only' Article Types.....	77
PROPOSAL ENHANCEMENTS.....	79
Add Proposals to Schedule Groups.....	79
Predefine Invited Article Title	84
REPORTING ENHANCEMENTS	90
Automated Reminders for Invited Authors	90
MERGE FIELD ENHANCEMENTS	96
%ALL_AUTHORS_WITH_SELECTED_METADATA% Enhancement.....	96
Author Contributor Roles Merge Field.....	98
All Authors and Contributor Roles Merge Field.....	99
ORCID Authentication Deep Link.....	100
checkCIF Results Merge Field.....	102
APPENDIX: BOOKS PROCESSING	103
Book Processing.....	103
General Workflow	104
Add Regular Submissions to a Book-related Schedule Group	111
Close Book Schedule Group.....	112
Reporting.....	112
Configuration.....	113

GENERAL ENHANCEMENTS

Restrict File Types for Submission Items

In EM version 12.2, Authors may upload virtually any type of file when submitting a paper, provided that the publication has configured the Submission Item accordingly. While an Administrator may set the maximum file size of uploaded files on the 'Set Maximum Size of Uploaded File' in *PolicyManager*, there currently aren't any other restrictions that the publication can place upon incoming source files.

In EM version 13.0, publications can choose to restrict the types of files that the Author may submit on the 'Attach Files' page for New and Revised Submissions. Configuration of these restrictions takes place on the 'Add/Edit Submission Item Type' page after adding a new Submission Item or editing an existing item from the 'Edit Submission Items' page in *PolicyManager*.

NOTE: A Submission Item's file restrictions are extended to Editors & Publishers during an 'Edit Submission' session unless the Editor or Publisher has the new "Bypass 'Restricted File Types' Requirements" permission under the 'Edit Submission' section of *RoleManager*.

Sample Edit Submission Item Type page in PolicyManager. File Type restrictions have been enabled for both New Submissions (Exclusive) and Revised Submissions (inclusive)

Edit Submission Item Type

Insert Special Character

Item Type: Maximum 256 characters

Item Type Family:

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

Reviewer PDF Handling:

Author/Editor PDF Handling:

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

URL/URI/External Resource Entry (in lieu of file upload):

Display with automatic line numbering in PDF
 Include this Item Type for Artwork Quality Checking
 Include this Item Type for checkCIF
 Include this Item Type for Reference Checking
 This Item Type will contain reference annotations. [Example](#)

Restricted File Types

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

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

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

New Submission	Revised Submission
<p><input type="radio"/> Allow all file types</p> <p><input checked="" type="radio"/> Exclusive: Allow all file types on the list except the ones selected.</p> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;"> <p>Excel 97-2003 Spreadsheet (XLS)</p> <p>PICT Image (PCT PICT)</p> <p>TeX Document (TEX)</p> <p>WordPerfect Document (WPD WPG)</p> <p>Word 97-2003 Compatible Document (DOC RTF HTM HTML TXT)</p> <p>PDF Document (PDF)</p> <p>PostScript (PS EPS)</p> </div> <p><input type="radio"/> Inclusive: Allow only these files types</p> <div style="border: 1px solid gray; padding: 2px;"> <p>Open Office PowerPoint (OPD)</p> <p>Open Office Word (ODT)</p> <p>Open Office Excel (ODS)</p> <p>PowerPoint 2007 (PPTM PPTX)</p> <p>Excel 2007 (XLSB XLSM XLSX)</p> <p>Word 2007 (DOCX DOCM DOTM DOTX)</p> <p>Compiled LaTeX File (DVI)</p> </div>	<p><input type="radio"/> Allow all file types</p> <p><input type="radio"/> Exclusive: Allow all file types on the list except the ones selected.</p> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;"> <p>Open Office PowerPoint (OPD)</p> <p>Open Office Word (ODT)</p> <p>Open Office Excel (ODS)</p> <p>PowerPoint 2007 (PPTM PPTX)</p> <p>Excel 2007 (XLSB XLSM XLSX)</p> <p>Word 2007 (DOCX DOCM DOTM DOTX)</p> <p>Compiled LaTeX File (DVI)</p> </div> <p><input checked="" type="radio"/> Inclusive: Allow only these files types</p> <div style="border: 1px solid gray; padding: 2px;"> <p>PICT Image (PCT PICT)</p> <p>TeX Document (TEX)</p> <p>WordPerfect Document (WPD WPG)</p> <p>Word 97-2003 Compatible Document (DOC RTF HTM HTML TXT)</p> <p>PDF Document (PDF)</p> <p>PostScript (PS EPS)</p> <p>General image (JPG JPEG GIF BMP PSD PNG)</p> </div>

A new section is added to the 'Add/Edit Submission Item Type' below the current Item Type configurations: 'Restricted File Types.' From this section, Administrators have the option to allow all file types (current, default functionality), allow all file types with discrete exclusions ("Exclusive" multi-selector box), or allow only the selected file types ("Inclusive" multi-selector box) for the Author attaching the submission item on the 'Attach Files' page. Different restrictions may be placed on the Submission Item Type for New Submissions and Revised Submissions submitted to the publication.

NOTE: The 'Restricted File Types' section of the page is only visible when the "URL/URI/External Resource Entry (in lieu of file upload)" option is set to 'Hidden' or 'Optional.'

NOTE: Compressed files (zip, gz, tgz, and tar) cannot be restricted. If the compressed files are unpacked, each uncompressed file will be subject to the publication's file type restrictions.

Submissions Items that are configured to *not* build into the PDF may not be fully restricted with this feature. For example, if a publication excludes 'TeX Documents' by selecting it on the 'Exclusive' multi-selector box, a user would be prevented from uploading TeX files, but could upload all unselected file types as well as any file type not listed in the multi-selector box. To put more stringent constraints on uploads of files not built into the PDF, select file types from the "Inclusive" multi-selector box.

Authors (as well as Editors and Publishers who do not have "Bypass 'Restricted File Types' Requirements" permission) are restricted based on the publication's file type restriction for an item, both when uploading a file and changing the Item Type of an uploaded item.

TO CONFIGURE:

In *PolicyManager*, go to the 'Submission Policies' section and click 'Edit Submission Items'. Add or Edit any existing Submission Item.

The 'Restricted File Types' section should be displayed unless the 'URL/URI/External Resource Entry (in lieu of file upload)' option is set to 'Required.'

From this section, Administrators have the option to allow all file types (current, default functionality), allow all file types with discrete exclusions ("Exclusive" multi-selector box), or allow only the selected file types ("Inclusive" multi-selector box) for the Author attaching the submission item on the 'Attach Files' page. Different restrictions may be placed on the Submission Item Type for New Submissions and Revised Submissions submitted to the publication.

NOTE: Submissions Items that are configured to *not* build into the PDF may not be fully restricted with this feature if the 'Exclusive' setting is used.

To select more than one file from the multi-selector box, hold down the 'Control' key on your keyboard while clicking the desired file types.

Sample Edit Submission Item Type page: This Submission Item is configured to NOT build into the PDF. For New Submissions, Authors (and Editors & Publishers without 'Bypass' permission) will only be able to upload PDF files for this Submission Item ('Inclusive' box). For revisions, all file types are allowed to be uploaded for this Submission Item (including files types not on the Exclusive list) except for PCT/PICT and Word Perfect files ('Exclusive' box).

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

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

Reviewer PDF Handling:

Author/Editor PDF Handling:

URL/URI/External Resource Entry (in lieu of file upload):

Display with automatic line numbering in PDF

Do Not Unpack Archive files (.ZIP, .tar) of this Type

Include this Item Type for checkCIF

Include this Item Type for Reference Checking

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

Restricted File Types

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

For a file that will not be built into either a Reviewer PDF or an Author/Editor PDF, you can allow all file types, or define either an exclusive list or an inclusive list.

- Allow all file types supported by the system (no publication file restrictions)
- Exclusive: Do not allow the file types selected on the list. File types not on the list are allowed.
- Inclusive: Allow only the file types selected on the list.

New Submission

Allow all file types

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

Open Office PowerPoint (OPD)

Open Office Word (ODT)

Open Office Excel (ODS)

PowerPoint 2007 (PPTM PPTX)

Excel 2007 (XLSB XLSM XLSX)

Word 2007 (DOCX DOCM DOTM DOTX)

Compiled LaTeX File (DVI)

Inclusive: Allow only these file types

PICT Image (PCT PICT)

TeX Document (TEX)

WordPerfect Document (WPD WPG)

Word 97-2003 Compatible Document (DOC RTF HTM HTML TXT)

PDF Document (PDF)

PostScript (PS EPS)

General Image (JPG JPEG GIF BMP PSD PNG)

Revised Submission

Allow all file types

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

MacDraw PICT (PCT PICT)

SuperPaint PICT (PCT PICT)

PowerPoint 97-2003 File (PPT)

Excel 97-2003 Spreadsheet (XLS)

PICT Image (PCT PICT)

WordPerfect Document (WPD WPG)

Inclusive: Allow only these file types

Open Office PowerPoint (OPD)

Open Office Word (ODT)

Open Office Excel (ODS)

PowerPoint 2007 (PPTM PPTX)

Excel 2007 (XLSB XLSM XLSX)

Word 2007 (DOCX DOCM DOTM DOTX)

Compiled LaTeX File (DVI)

Color Codes for Companion Files

Choose the default color code for companion file upload:

Default	Color	Description
<input checked="" type="radio"/>		No default color
<input type="radio"/>		!!!!!!!!!!!!
<input type="radio"/>		<3
<input type="radio"/>		*****

As in existing functionality, the configured Submission Item may then be set to “Hidden,” “Optional,” or “Required” for each Article Type.

To allow an Editor or Publisher the ability to upload any and all file types for a restricted Submission Item, the new “Bypass ‘Restricted File Types’ Requirements” permission must be enabled in *RoleManager* for an Editor or Publisher Role. This new permission may be found in the “Edit Submission” section of the respective Editor and Publisher *RoleManager* pages.

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4

NOTE: Upon upgrade, no Submission Item File Type restrictions will be imposed. Therefore, this submission is selected by default upon a publication's upgrade to 13.0.

Sample 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**
- Editor Assignment**
- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**
- General Searching and Viewing**
- Edit Submission**
 - Edit Submission Before Decision
 - View Reviewer PDF After Edit Submission
 - Require View of Reviewer PDF After Edit Submission
 - Edit Submission After Decision and Final Disposition
 - Download Source Files
 - Download Companion Files
 - Upload, Hide and Restore Companion files
 - Assign Manuscript Classifications
 - Manage Other Authors
 - Edit Other Author E-mail Address
 - Bypass 'Restricted File Types' Requirements
- Discussion Forums**
- Transmittal Form**
- Sending E-mail**
- Viewing and Editing People Data**
- Flag Icons**
- Proxy Activities**
- Administrative and Reporting Functions**
- Cross-Publication Login**
- ProduXion Manager**

Sample Publisher RoleManager page

Edit Role Definition

Role Name:*

Check the functions that this role is permitted to perform.

[Expand All](#) [Collapse All](#)

- General Searching and Viewing**
- Flag Icons**
- Transmittal Form**
- Edit Submission**
 - Edit Submission Before Decision
 - Edit Submission After Decision and Final Disposition
 - Bypass 'Restricted File Types' Requirements
- Cross-Publication Login**
- ProduXion Manager**

CRedit Taxonomy for Authors

There is a new open standard emerging for expressing/classifying the diverse roles played in the work leading to a research output. The classification includes but is not limited to traditional authorship roles. *Project CRedit (Contributor Roles Taxonomy)* has created an initial taxonomy that classifies fourteen different 'Contributor Roles'. Each person contributing to a piece of research may be assigned multiple roles. For more information on *Project CRedit*, see: <http://casrai.org/CRedit>

Some publications are already using CRedit Contributor Roles terminology to capture more granular information about contributing Authors. In EM version 12.2, this is done by using Custom Submission Questions for Authors and Co-Authors.

New in EM version 13.0, CRedit Taxonomy is integrated into Editorial Manager so Corresponding Authors may select Contributor Roles and the Degrees of Contribution for themselves and co-Authors during a submission session. Similarly, Editors may select or change Contributor Roles for Authors during an Edit Submission session. Once configured for the publication, Contributor Roles may be made 'Optional' or 'Required' by Article Type.

Sample Enter Author Details window on the Add/Edit/Remove Authors submission step displaying the new Contributor Roles field

Enter Author Details Open Special Character Palette

Given/First Name*

Middle Name

Family/Last Name*

Academic Degree(s)

Affiliation

E-mail Address*

ORCID [Fetch](#)

[What is ORCID?](#)

Institution

Department

City

State

Zip or Postal Code

Country*

Contributor Roles

- This is the corresponding author
- Deceased Status
- Equal Contribution Status
- Post-Publication Corresponding Author

Sample Enter Author Details interface where the Contributor Roles section has been expanded and the publication has been configured to collect Degrees of Contribution as well as an optional 'Other' field.

Enter Author Details Open Special Character Palette

Title

Given/First Name*

Middle Name

Family/Last Name*

Academic Degree(s)

Affiliation

E-mail Address

ISNI

ORCID [Fetch](#)

[What is ORCID?](#)

Position

Institution

Department

City

State

Country

Contributor Roles Instructions

- Conceptualization
- Data curation
- Formal analysis
- Funding acquisition
- Investigation
- Methodology
- Project administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing – original draft
- Writing – review & editing
- Other:

This is the corresponding author

Deceased Status

Equal Contribution Status

Post-Publication Corresponding Author

Select degree

- Lead
- Equal
- Supporting

When a Co-Author is asked to verify their contribution to a submission, the Co-Author Verification e-mail can include the set of Contributor Roles attributed to them by means of the new merge field **%AUTHOR_CONTRIBUTOR_ROLES%**.

NOTE: A Co-Author cannot edit their own Contributor Role metadata within EM. If there is confusion about a Co-author's Contributor Role and/or Degree, they must contact either the Corresponding Author or the publication.

Contributor Roles (as well as Degrees of Contribution) can be configured to be displayed on the PDF Cover Page and the Transmittal Form (as well as the **%TRANSMITTAL_FORM%** merge field). The *Author Details* page (accessed from the main *Details* page for the submission) is enhanced to display the Contributor Roles metadata.

A Corresponding Author who has the permission 'View Other Author Status' and/or the permission 'Manage Other Authors' may access the Author Details page by clicking the Action Link 'Author Status' in various Author main menu folders. An Editor who has the permission 'Manage Other Authors' may click the 'Author Status' link on the 'Details' page to view the Author Details page, which is enhanced to display the Contributor Roles metadata. This enhancement allows the Editor to view (but not edit) all the Contributor Roles metadata for all Authors in one location.

Sample Author Details page for Editor with 'Manage Other Authors' permission

Author Details for Manuscript Number: Unassigned Contrib									
Close									
Corresponding Author Status									
Order	Author Name	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options		
1	Mary Shelby Roman	Conceptualization (Equal) Formal analysis (Supporting) Investigation (Supporting) Writing - original draft (Lead)	mmahoney@ariessys.com	0000-0003-4038-9543		Institution of Editors	View Author Details		
Other Author Status									
Order	Author Name	Added in Revision	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
2	David Jones	RO	Formal analysis (Equal) Funding acquisition (Equal) Project administration (Equal) Resources (Supporting) Supervision (Lead)			M.D.		No Response	
Removed Authors									
There are no removed authors									
Close									

The *View Author Details* page is also enhanced to display the Contributor Roles metadata. This page is available to Editors and Authors who have the appropriate permissions.

Sample View Author Detail page, accessed by an Editor with 'Manage Other Authors' permission by clicking the View Author Details link from the Author Status page, located on the Details page.

View Author Detail

Title	Dr.
Given/First Name*	Mary
Middle Name	Shelby
Family/Last Name*	Roman
Academic Degree(s)	
Affiliation	Institution of Editors
E-mail Address	kmahoney@ariessys.com
ISNI	213543
ORCID	0000-0003-4038-9543
	What is ORCID?
Position	Position
Institution	Institution of Editors
Department	Dept. of Editors
City	North Andover
State	Ma
Country	UNITED STATES
Contributor Roles	Conceptualization: Equal Formal analysis: Supporting Investigation: Supporting Writing – original draft: Lead
Equal Contribution Status	
Post-Publication Corresponding Author	Yes

Reporting

Contributor Roles are available for reporting – tables containing the publication's selected CRediT Taxonomy version and Contributor Roles/Degrees of Contribution have been added to General Data Export.

A 'Contributor Roles' field is added to the following reporting views for Custom Reports:

- Authors & Personal Identifiers View
- Submissions & All Authors Questionnaires View
- Submissions and Author Questionnaires View

Additionally, an 'All Authors and Contributor Roles' field is added to the Authors & Submissions View for Custom Reporting.

For publications using Enterprise Analytics Reporting, the 'Contributor Roles' field is available for inclusion in reports in the 'Fields' tab.

For publications using Cross-Publication Enterprise Analytics Reporting, the Contributor Roles field is added to the 'Cross-Publication Submissions & Author Questionnaires View' and the 'All Authors and Contributor Roles' field is added to the 'Cross-Publication Authors & Submissions View'.

Transmittals

Contributor Roles metadata is added to the following existing general Transmittal Methods that use JATS:

- Submission Production Task Transmittal Methods
 - JATS 1.0A Production Task Export
 - JATS 1.1A Production Task Export
 - JATS 1.1A DTD V2 Production Task Export
- Editorial Manager Transmittal Methods
 - Single Destination Transmittal: JATS 1.0A
 - Single Destination Transmittal: JATS 1.1A

The <role> element is used to transmit Author Contributor Role information:
<role content-type="Conceptualization"/>

If Degrees of Contribution are collected by the publication, the <role> element will display the Contributor Role and Degree of Contribution separated by a colon:
<role content-type="Conceptualization:Lead"/>

If the publication has used the 'Other' field to allow Authors to enter Contributor Roles not included in the configured version of the publication's taxonomy, the text string will be transmitted in the <role> element as entered by the Author.

Submission Transfers

The Contributor Roles metadata for all Authors is included in submission transfers to other EM sites (both Portal and non-Portal based) if the submission to be transferred has any Contributor Roles attributed to any of its Authors for any versions of the submission. The version of the taxonomy used to collect the roles is transferred with the submission metadata.

Once transferred to the target publication and edited, the submission must meet the configuration for Contributor Roles on the target publication before the submission PDF can be built. The Author metadata should be pre-populated with any Contributor Role information provided on the source journal, but editing the Contributor Roles on the target publication will use that publication's configured version of the taxonomy.

NOTE: Contributor Roles metadata is not transferred for submission transferred to a non-EM publication.


TO CONFIGURE:

To use CRediT Taxonomy within EM, go to the new 'Configure Contributor Roles' page in the 'Submission Policies' section of *PolicyManager*.

Sample PolicyManager main page, location of 'Configure Contributor Roles' outlined in green

PolicyManager Main Menu

[Expand All](#) [Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊖ **Submission Policies**
 - [Edit Article Types](#)
 - [Edit Submission Items](#)
 - [Configure Color Codes for Companion Files](#)
 - [Edit Sections/Categories](#)
 - [Set Classifications Display Policy](#)
 - [Edit Classifications](#)
 - [Edit Request Authenticated ORCID iD Instructions](#)
 - [Define PDF Cover Page Layouts](#)
 - [Configure PDF Watermarks](#)
 - [Select Author's Reviewer Preferences](#)
 - [Set Request Editor or Assign Editor Display Options](#)
 - [Edit Manuscript Geographic Region of Origin](#)
 - [Edit Manuscript Submission Instructions](#)
 - [Configure Instructions for New Submission Redirect](#)
 - [Configure Manuscript Services Icon](#)
 - [Set Maximum Size of Uploaded File](#)
 - [Set Other Author Parameters](#)
 - Configure Contributor Roles
 - [Set Revision File Selection Option](#)
 - [Configure Duplicate Submission Check](#)
 - [Configure Technical Check](#)
 - [Configure checkCIF](#)
 - [Configure Office 2007 and Higher Support](#)
 - [Configure Author Accept Checkbox](#)
- ⊕ **Questionnaire Policies**
- ⊕ **Additional Data Policies**
- ⊕ **Editor Assignment Policies**
- ⊕ **Reviewer and Editor Form Policies**
- ⊕ **E-mail and Letter Policies**
- ⊕ **General Policies**
- ⊕ **Discussion Forums**
- ⊕ **Linked Submissions Policies**
- ⊕ **Conference Submission Policies**
- ⊕ **Transmittal Policies**
- ⊕  **ProduXion Manager**

Once on the new 'Configure Contributor Roles' page, select a version of the CRediT Taxonomy your publication will be using to collect Author & Co-Author information. Options to collect 'Degrees of Contribution' and to provide a free text entry 'Other' box for Contributor Roles are also available.

On the Add/Edit/Authors submission step, an 'Instructions' link is located on the 'Edit/Enter Author Details' page pop up when the 'Contributor Roles' section has been expanded. These instructions may be customized in the text field at the bottom of the 'Configure Contributor Roles' page in *PolicyManager*.

Sample Configure Contributor Roles page, Taxonomy “Version 0” has been selected and the publication has opted to also collect ‘Degrees of Contribution’ and to display an ‘Other’ box for free text entry of a Contributor Role that may not be covered by the standard, selected version of CRediT Taxonomy

Configure Contributor Roles

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

For more information on Contributor Roles and Project CRediT, click here: <http://credit.casrai.org>

Set Taxonomy Version

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

Choose Taxonomy: Version 0 [View Taxonomy](#)

Select Additional Metadata to be Collected

The following options allow you to specify whether to collect a Degree of Contribution for each Contributor Role assigned to an Author, and whether to display a text box to allow the Corresponding Author to enter a name or description of a role that is not in the taxonomy.

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

Edit Instructions

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

Area	Instructions
Contributor Roles Instructions	<div style="border: 1px solid gray; padding: 5px;"> <p style="color: blue; margin: 0;">Insert Special Character</p> <p style="font-family: monospace; margin: 0;">The roles listed are from the CRediT Taxonomy, a classification standard used to ensure that Authors are credited for their contributions toward published scholarly works. Please visit http://credit.casrai.org for more information.</p> <p style="font-family: monospace; margin: 0;">

You may select one or more Contributor Roles for each Author of a</p> </div> <p style="margin-top: 5px;"> View Default Instructions Revert to Default Instructions </p>

Once a version of CRediT Taxonomy has been selected, the ‘Contributor Roles’ must be set to ‘Display’ on the ‘Set Other Author Parameters’ page in *PolicyManager*. The link to this page is located directly above the ‘Configure Contributor Roles’ link in the Submission Policies section.

Sample Set Other Author Parameters page in PolicyManager: Contributor Roles preference has been set to 'Display'

Set Other Author Parameters

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

Deceased Status, Equal Contribution Status and Post-Publication Corresponding Author can be set as 'Hidden' or 'Display'. If these fields are set to display, the Add/Edit/Remove Authors submission step will display a checkbox so that an Author(s) can be designated as deceased or an equal contributor on the paper. The Post-Publication Corresponding Author designation does not impact the editorial workflow in any way; it is a designation that is indicated on the published article.

The %ALL_AUTHORS_WITH_SELECTED_METADATA% merge field pulls in your choice of metadata elements for all Authors (including the Corresponding Author) to use in letters. To specify metadata for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all elements you want to include. ([more...](#))

Other Author Parameters		Include in Merge Field?
Set "Title" Text Entry Box Preference:	Optional ▼	<input type="checkbox"/>
Given/First Name	Required	<input type="checkbox"/>
Set "Secondary Given/First Name" Text Entry Box Preference:	Hidden ▼	<input type="checkbox"/>
Set "Middle Name" Text Entry Box Preference:	Optional ▼	<input type="checkbox"/>
Family/Last Name	Required	<input type="checkbox"/>
Set "Secondary Family/Last Name" Text Entry Box Preference:	Hidden ▼	<input type="checkbox"/>
Entire list of parameters not shown		
Set "Zip or Postal Code" Text Entry Box Preference:	Hidden ▼	<input type="checkbox"/>
Set "Country" Preference:	Optional ▼	<input type="checkbox"/>
Set "Contributor Roles" Preference:	Display ▼	<input type="checkbox"/>
Set "Deceased Status" Checkbox Preference:	Display ▼	<input type="checkbox"/>
Set "Equal Contribution Status" Checkbox Preference:	Display ▼	<input type="checkbox"/>
Set "Post-Publication Corresponding Author" Checkbox Preference:	Display ▼	<input type="checkbox"/>

Once the 'Contributor Roles' preference has been set to 'Display', this field will be available for data collection during the submission process for new submissions going forward. By default, the collection of this metadata will be optional.

NOTE: Once a version of CRediT Taxonomy has been associated with a submission, it is fixed for the lifetime of the submission, even if the publication decides to switch versions of the taxonomy midway through a submission's workflow. The only exception to this rule is when a new Revision is submitted that previously had not collected and saved any Author Contributor Roles.

Contributor Role metadata collection can be made 'Required' for a Corresponding Author submitting a new submission by configuring the Article Type.

On the 'Edit Article Types' page in *PolicyManager*, add or edit any existing Article Type. Scroll to the new 'All Authors Parameters' section of the page (located underneath the Co-Author Parameters section). From the drop down menu labeled 'Contributor Roles,' select the 'Required' option. When an Author submits a new submission using this Article Type, they will be required to enter their own Contributor Role(s) as well as the Contributor Roles of all Co-Authors.

Sample of the Edit Article Types page (partial) – new All Authors Parameters section outlined in green

The screenshot shows a portion of the 'Edit Article Types' page. At the top, there is a text input field for 'Authenticated ORCID ID Request' set to 'Hidden'. Below this is a section titled 'Co-Author Parameters' with a sub-section 'Register/Verify Other Authors' containing a dropdown menu set to 'Co-Authors register and verify on new submission'. A checkbox for 'Display Author Questionnaire to Co-Authors' is present. The 'All Authors Parameters' section is highlighted with a green border and contains a 'Contributor Roles' dropdown menu with 'Required' selected. To the right of the dropdown, there is explanatory text: 'When Contributor Roles are set to "Display" on the Set Other Author Parameters page, this option allows you to specify whether they are "Optional" or "Required" for this Article Type. These settings affect any invitations...'

To configure Author & Co-Author Contributor Role metadata on the PDF cover page, go to the 'Define PDF Page Layouts' page in the 'Submission Policies' section of *PolicyManager*. Add a new layout, copy an existing layout, or edit an existing layout to proceed. Once on the 'Add/Edit PDF Cover Page Layout' page, click the 'Select Items for Display' link.

In the 'Information Submitted by Author' section, select 'All Authors and Contributing Roles (List including Corresponding Author)'. As in existing functionality, once the data is selected to display on the PDF Cover page, an Administrator can rearrange the order when returned to the 'Add/Edit PDF Cover Page Layout' page.

Sample Select Items to Display page

Select Items to Display for Copy of Default Editor/Author Layout

Select the information to appear on the PDF Cover Page.

[Expand All](#) [Collapse All](#)

Information Submitted by Author

- Article Type
- Full Title
- Secondary Full Title
- Short Title
- Secondary Short Title
- First Author
- First Author Secondary Information
- Corresponding Author (*First, Middle and Last Name, Institute, City, State, and Country*)
- Corresponding Author Secondary Information
- Corresponding Author E-Mail
- Corresponding Author Institution
- Corresponding Author Secondary Institution
- Other Authors (*List excluding Corresponding Author*)
- All Authors (*List including Corresponding Author*)
- All Authors and Contributing Roles (*List including Corresponding Author*)
- All Authors Secondary Information (*List including Corresponding Author*)
- Funding Information
- Abstract
- Secondary Abstract
- Suggested Reviewers
- Opposed Reviewers
- Response to Reviewers

Complete metadata options not shown

General Manuscript Information

[Expand All](#) [Collapse All](#)

To configure Contributor Role metadata to display and transmit with submission transmittals and transfers, 'Contributor Roles' must be selected on the 'Select Corresponding Author Metadata Fields' page (located in the 'Transmittal Policies' section of *PolicyManager*).

Sample Select Corresponding Author Metadata Fields' page

Select Corresponding Author Metadata Fields

The following form contains the metadata information that Editorial Manager stores for the corresponding Author. Please select the information you would like transmitted to the production system. If a field is checked, it has been previously selected by your journal. If the field you are looking for is not in the list below, click the following link to [Add Author Metadata Fields](#).

[Check All](#) [Clear All](#)

Select Field	Field Name	
<input type="checkbox"/>	People Unique ID	Help
<input type="checkbox"/>	Author's Order	Help
<input checked="" type="checkbox"/>	Title	Help
<input checked="" type="checkbox"/>	First Name	Help
<input checked="" type="checkbox"/>	Middle Name	Help
<input checked="" type="checkbox"/>	Last Name	Help
<input type="checkbox"/>	Nickname	Help
Complete list of Author metadata not shown		
<input type="checkbox"/>	Scopus Author ID	Help
<input checked="" type="checkbox"/>	Alternate Address Start Date	Help
<input checked="" type="checkbox"/>	Alternate Address End Date	Help
<input checked="" type="checkbox"/>	Unavailable Start Date	Help
<input checked="" type="checkbox"/>	Unavailable End Date	Help
<input type="checkbox"/>	Deceased Status	Help
<input checked="" type="checkbox"/>	Contributor Roles	Help
<input type="checkbox"/>	Equal Contribution Status	Help
<input type="checkbox"/>	Post-Publication Corresponding Author	Help
<input type="checkbox"/>	Secondary Author First Name Field	Help
<input type="checkbox"/>	Secondary Last Name Field	Help
<input type="checkbox"/>	Secondary Degree Information Field	Help
<input type="checkbox"/>	Secondary Author Position Information Field	Help
<input type="checkbox"/>	Secondary Author Institution Information	Help
<input type="checkbox"/>	Secondary Author Department Field	Help
<input type="checkbox"/>	Secondary Author Street Address Line 1	Help
<input type="checkbox"/>	Secondary Author Street Address Line 2	Help
<input type="checkbox"/>	Secondary Author Street Address Line 3	Help
<input type="checkbox"/>	Secondary Author Street Address Line 4	Help
<input type="checkbox"/>	Secondary Author City Field	Help
<input type="checkbox"/>	Secondary Author State Field	Help

[Check All](#) [Clear All](#)

To display and transmit Contributor Role metadata on the Transmittal Form for Co-Authors, 'Contributor' Roles must be selected on the 'Select Co-Author Metadata Fields' page (also located in the 'Transmittal Policies' section of *PolicyManager*).

Sample Select Co-Author Metadata Fields' page

Select Co-Author Metadata Fields

The following form contains the metadata information that Editorial Manager stores for the Co-Authors. Please select the information you would like transmitted to the production system. If a field is checked, it has been previously selected by your journal. If the field you are looking for is not in the list below, click the following link to [Add Author Metadata Fields](#).

[Check All](#) [Clear All](#)

Select Field	Field Name	
<input checked="" type="checkbox"/>	Co-Author: People Unique ID	Help
<input checked="" type="checkbox"/>	Co-Author: Author's Order	Help
<input checked="" type="checkbox"/>	Co-Author: Title	Help
<input checked="" type="checkbox"/>	Co-Author: First Name	Help
<input checked="" type="checkbox"/>	Co-Author: Middle Name	Help
<input checked="" type="checkbox"/>	Co-Author: Last Name	Help
<input checked="" type="checkbox"/>	Co-Author: Degree	Help
<input checked="" type="checkbox"/>	Co-Author: Nickname	Help
<input checked="" type="checkbox"/>	Co-Author: E-mail Address	Help
<input checked="" type="checkbox"/>	Co-Author: Position	Help
<input checked="" type="checkbox"/>	Co-Author: Institution	Help
<input checked="" type="checkbox"/>	Co-Author: Department	Help
<input checked="" type="checkbox"/>	Co-Author: Author's Affiliation	Help
<input checked="" type="checkbox"/>	Co-Author: Address Line 1	Help
<input checked="" type="checkbox"/>	Co-Author: Address Line 2	Help
<input checked="" type="checkbox"/>	Co-Author: Address Line 3	Help
<input checked="" type="checkbox"/>	Co-Author: Address Line 4	Help
<input checked="" type="checkbox"/>	Co-Author: City	Help
<input checked="" type="checkbox"/>	Co-Author: State	Help
<input checked="" type="checkbox"/>	Co-Author: Zip	Help
<input checked="" type="checkbox"/>	Co-Author: Country	Help
<input checked="" type="checkbox"/>	Co-Author: ISNI	Help
<input checked="" type="checkbox"/>	Co-Author: ORCID	Help
<input checked="" type="checkbox"/>	Co-Author: ORCID Authenticated	Help
<input checked="" type="checkbox"/>	Co-Author: PubMed Author ID	Help
<input checked="" type="checkbox"/>	Co-Author: ResearcherID	Help
<input checked="" type="checkbox"/>	Co-Author: Scopus Author ID	Help
<input checked="" type="checkbox"/>	Co-Author: Deceased Status	Help
<input checked="" type="checkbox"/>	Co-Author: Contributor Roles	Help
<input checked="" type="checkbox"/>	Co-Author: Equal Contribution Status	Help
<input checked="" type="checkbox"/>	Co-Author: Post-Publication Corresponding Author	Help

[Check All](#) [Clear All](#)

NOTE: If the 'Contributor Roles' metadata has been configured to display on the Transmittal Form for the Corresponding Author and/or Co-Authors, the information will also be included in the existing **%TRANSMITTAL_FORM%** merge field.

Required Reviews Reset Event

In EM version 12.2, the 'Required Reviews Complete' *ActionManager* event is triggered when the number of Required Reviews Complete configured in the submission's Article Type settings is satisfied. The document status changes to 'Required Reviews Complete,' but does not take into consideration any increase of the number of Reviews Required made on the 'Reviewer Selection Summary' page. If an Editor increases the number of Required Reviews on the 'Reviewer Selection Summary' page, the document status will remain as 'Required Reviews Complete' even though that is no longer true.

New in EM version 13.0, publications have access to a new event in *ActionManager* that is triggered by an Editor increasing the number of Required Reviews when the existing number of completed reviews is less than the new value: 'Required Reviews Reset.' Triggering this event can send letters to users associated with the submission (if configured in the Role's *ActionManager* grid) as well as return the Document Status to the publication's 'Under Review' status (if configured in the Document Status Table in *ActionManager*).

NOTE: Upon upgrade to 13.0, the 'Required Reviews Reset' event has a Document Status of "NO CHANGE." System Administrators will need to go to the Document Status table in *ActionManager* and select the desired status triggered by the event.

Sample ActionManager Document Status layout

ActionManager			
Registration			
Event	New Document Status	Warnings	Alternative Text for Authors
New User Registers	No Change		
Forgot Username or Password	No Change		
Forced Username Change	No Change		
Merged Duplicate Users	No Change		
Rest of page unchanged			
Editor Requested	No Change		
Reviewer Assigned			
Event	New Document Status	Warnings	Alternative Text for Authors
Request Unregistered Reviewer	No Change		
Reviewer Invited	Under Review		
Reviewer Assigned (Not Invited)	No Change		
Reviewer Agree	No Change		
Reviewer Decline	No Change		
Review Due Date Changed	No Change		
Un-invite Reviewers Before Agreeing to Review	No Change		
Un-assign Reviewers After Agreeing to Review	No Change		
Promote Alternate Reviewers	Under Review		
Re-open Review	No Change		
Review Assignment Completed	No Change		
Required Reviews Complete	Required Reviews Completed		
Required Reviews Reset	Under Review		

This event can be triggered at any point during the submission process as long as the submission is still in a state where Reviewers can be invited.

Sample Reviewer Selection Summary page (partial)

The screenshot shows a web interface for managing reviews. At the top, there is a 'Reviewer Search' section with a search bar and a 'Go' button. Below that is the 'Review Settings' section, which includes a 'Change' link next to the number '2'. A green arrow points from this link to a dialog box titled 'Change Number of Required Reviews'. The dialog box contains the text: 'Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as 3 review(s) have been completed.' The number '3' is entered in a text input field. At the bottom of the dialog box are 'Cancel' and 'Save and Close' buttons. The background shows a sidebar with 'Selected Reviewers', 'Invited Reviewers' (including Johnny Cakes), and 'Alternate Reviewers'.

In the example above, the Article Type is configured so that the completion of two Reviews will move the submission to the 'Submissions with Required Reviews Complete' folder and trigger the respective document status change. In this case, an Editor has clicked the '[Change]' link and increased the number of Required Reviews to three. If the new 'Required Reviews' value is greater than the number of Reviews already completed for the submission, the new 'Required Reviews Reset' event is triggered upon clicking the 'Save and Close' button and the document status will change to 'Under Review.'

TO CONFIGURE:

A System Administrator must go to *ActionManager* and make Document Status and notification adjustments for the new 'Required Reviews Reset' event.

Editor Access to Reviewer PDF

In EM version 12.2, Editors have access to the Author/Editor version of the submission PDF. This is the same version that the Corresponding Author sees – everything is included in this version and available from the ‘View Submission’ links throughout EM and PM. When the Author builds the PDF, another version of the submission is created especially for Reviewers. The Reviewer PDF can be configured in *PolicyManager* to exclude certain submission items to make sure only the relevant files are displayed to the Reviewer. This is helpful for publications that operate using blind peer review or require Corresponding Authors to attach confidential files to the submission.

New in EM version 13.0, permissions are added to Editor *RoleManager* to allow access to the Reviewer version of the PDF so Editors can make sure all intended items are displayed and the PDF is blinded appropriately.

Sample overlay after clicking ‘View Submission’ action link – Editor has access to Reviewer PDF



Three new *RoleManager* permissions are added to Editor *RoleManager* that govern access to the Reviewer PDF:

- **‘View Reviewer PDF’** – This permission allows Editors to choose to view the Reviewer PDF in addition to the Author/Editor PDF when accessing the submission from a ‘View Submission’ link.
- **‘View Reviewer PDF after Edit Submission’** – This is a sub-permission of ‘Edit Submission Before Decision’. If selected, this permission allows and Editor Role to access the current revision of the Reviewer PDFs in the ‘Submissions Requiring Approval by Editor’ folder via the new ‘View Reviewer PDF’ action link.
- **‘Require View Reviewer PDF after Edit Submission’** – This is a sub-permission of the new ‘View Reviewer PDF after Edit Submission’. If selected, the Editor must view the Reviewer PDF from the ‘View Reviewer PDF’ action link before approving the submission from the ‘Submissions Requiring Approval by Editor’ folder.

Sample Submissions Needing Approval by Editor folder - 'View Reviewer PDF after Edit Submission' & 'Require View Reviewer PDF after Edit Submission' permissions have been enabled for this user

Submissions Needing Approval by Editor - Mary Shelby Roman

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

Page: 1 of 1 (6 total submissions) Display 10 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Edit Submission Status Date	Edit Submission Status
View Submission View Reviewer PDF File Inventory Edit Submission Approve Submission Revert Submission Send E-mail Linked Submissions	Kristin126	Editorial's	Basic Science Section	Effectiveness of Homeopathic Remedies for Migraines	Mary Onette	Dec 17 2013 2:49:08:223PM	Feb 18 2014 2:46:36:157PM	Under Review	Feb 18 2014 2:46:36:157PM	PDF Needs Editor Approval
View Submission View Reviewer PDF File Inventory Edit Submission Approve Submission Send Back to Author Revert Submission Send E-mail Linked Submissions		Editorial's		S	Heebie Jeebies, Ph.D	May 20 2013 10:18:25:293AM	May 20 2013 10:18:25:340AM	Submitted to Journal	May 23 2013 1:11:24:090PM	PDF Needs Editor Approval
View Submission View Reviewer PDF File Inventory Edit Submission Approve Submission Send Back to Author Revert Submission Send E-mail Linked Submissions		Editorial's		Cross Ref Add Only 2	Heebie Jeebies, Ph.D	Mar 30 2010 4:22:33:257PM	Mar 30 2010 4:22:33:337PM	Submitted to Journal	Mar 30 2010 4:39:07:023PM	PDF Needs Editor Approval
View Submission View Reviewer PDF File Inventory Edit Submission Approve Submission Revert Submission Send E-mail Linked Submissions	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	Mar 25 2013 12:05:43:247PM	PDF Needs Editor Approval
View Submission View Reviewer PDF File Inventory Edit Submission Approve Submission Revert Submission Send E-mail Linked Submissions	6003InviteReviewersAlt1	Original Study		Got	Heebie Jeebies, Ph.D	Jun 6 2008 2:00:33:370PM	Jun 17 2008 10:48:16:543AM	Under Review	Oct 17 2011 11:51:11:737AM	PDF Needs Editor Approval
View Submission View Reviewer PDF File Inventory Edit Submission Approve Submission Revert Submission Send E-mail Linked Submissions	6003Invitereviewers1	Annual Meeting Abstract		Full Metal Jacket	Heebie Jeebies, Ph.D	Jun 3 2008 3:35:33:343PM	Jun 29 2009 6:19:08:720PM	Under Review	Mar 18 2010 4:20:05:897PM	PDF Needs Editor Approval

Page: 1 of 1 (6 total submissions) Display 10 results per page.

Editor Main Menu

When an Editor downloads the Reviewer PDF, Editorial Manager appends '_reviewer' to the file name to differentiate between a downloaded version of the Author/Editor version of the PDF.

Editors can currently view the submission PDF and the Reviewer PDF (if permission is granted) from the following places in EM:

- **Direct-to-Editor New Submissions folder** – Accessed from the Editor Main Menu when an Editor receives a new submission as an assignment via the direct-to-editor functionality
- **Direct-to-Editor Revised Submissions folder** - Accessed from the Editor Main Menu when an Editor receives a revised submission as an assignment via the direct-to-editor functionality
- **Assignment Status Report Results page**– Accessed from the Editor Main Menu by clicking the Reports link and choosing the Assignment Status Report. When a report is run this page shows the results

- **File Inventory page**– Accessed by clicking the File Inventory Action Link for a submission
- **My Assignments with a Final Disposition folder**– Accessed via the Submissions with Decisions section of the Editor Main Menu
- **View All Assigned Submissions folder** - Accessed via the View All Assigned section of the Editor Main Menu
- **Assignments with a Decision folder**– Accessed via the Submissions with Decisions section of the Editor Main Menu
- **All Submissions with Editor's Decision folder** – Accessed via the Submissions with Decisions section of the Editor Main Menu
- **All Submissions with Final Disposition folder** – Accessed via the Submissions with Decisions section of the Editor Main Menu
- **New Editor Invitations folder** – Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **New Editor Assignments folder**– Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **Submissions with One or More Late Reviews folder** – Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **New Submissions Requiring Assignment folder**– Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **Submissions Out for Revision folder**– Accessed via the Submissions with Decision section of the Editor Main Menu
- **Submissions Requiring Additional Reviewers folder** – Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **Submissions with Decisions Rescinded folder**– Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **Submissions with Reviewers Invited - No Response folder** – Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **Submissions with Required Reviews Complete folder** – Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **Revised Submissions Requiring Assignment folder**– Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **Revised Submissions folder**– Accessed via the Editor 'To-Do' List section of the Editor Main Menu when Technical Check has been enabled
- **Editors Invited Not Yet Assigned folder**– Accessed via the Editor 'To-Do' List section of the Editor Main Menu when an Editor is configured in RoleManager to invite editors using Suggest Editor.
- **Subordinate Editor's Pending Assignments - Group by Editors I Assigned folder** – Accessed via the Subordinate Editor's Pending Assignments section of the Editor Main Menu
- **Subordinate Editor's Pending Assignments - Group by Editor with Current Responsibility folder** – Accessed via the Subordinate Editor's Pending Assignments section of the Editor Main Menu

- **Subordinate Editor's Pending Assignments - Group by Manuscript Status folder**– Accessed via the Subordinate Editor's Pending Assignments section of the Editor Main Menu
- **Transferred Submissions folder** – Accessed via the Editor 'To-Do' List section of the Editor Main Menu when a site has received a transferred submission
- **Submissions Under Review folder** – Accessed via the Editor 'To-Do' List section of the Editor Main Menu
- **Submissions with n Reviews Complete folder**– Accessed from the top of the Editor Main Menu through a 'Submissions With:' section that appears only when an Editor has the 'View Completed Reviews Grid in Main Menu' permission in RoleManager
- **Deep Link Landing page**– Accessed by clicking a deep link from a merge field which brings a user into the system, impacted by this spec because the page is used when a user receives a deep link to the Reviewer PDF via the %VIEW_REVIEWER_PDF% merge field.
- **Production Initiated – No Tasks Assigned folder**– Accessed via the Production Tasks Main Menu when ProduXion Manager has been enabled for a site
- **People Information page**– Accessed by clicking the View Reviewers and Comments Action Link for a submission and then clicking on the name of a reviewer who has completed a review
- **Reviewer Selection Summary page**– Accessed by clicking the Invite Reviewers Action Link for a Submission
- **Search Submission Results page** – Accessed by running a search for submissions
- **Discussion Forum page** – Accessed by clicking the Initiate Discussion link for a submission when an Editor has the RoleManager permission to initiate a discussion
- **Technical Check page**– Accessed via the Technical Check Action Link which is only present when the Technical Check functionality has been enabled for a site
- **Artwork Quality Check Results page**– Accessed by clicking the View Artwork Quality Check Action Link for a submission which is available when the AQC functionality has been enabled for a site

TO CONFIGURE:

Navigate to the desired Editor Role in *RoleManager* and enable one or more of the three new permissions:

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**
- Editor Assignment**
- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**
- General Searching and Viewing**
 - Use Editorial Details Layout: ▼
 - Search All Manuscripts
 - Search Only Assigned Manuscripts
 - Share Saved Searches
 - Rest of the page unchanged**
 - Turn Off Manuscript Notes Flag
 - View Production Notes
 - Edit Production Notes
 - View Reviewer PDF
- Edit Submission**
 - Edit Submission Before Decision
 - View Reviewer PDF After Edit Submission
 - Require View of Reviewer PDF After Edit Submission
 - Edit Submission After Decision and Final Disposition
 - Download Source Files
 - Download Companion Files
 - Upload, Hide and Restore Companion files
 - Assign Manuscript Classifications
 - Manage Other Authors
 - Edit Other Author E-mail Address
 - Bypass 'Restricted File Types' Requirements
- Discussion Forums**
- Transmittal Form**
- Sending E-mail**
- Viewing and Editing People Data**
- Flag Icons**
- Proxy Activities**
- Administrative and Reporting Functions**
- Cross-Publication Login**
- Fees and Payments**
- Produxion Manager**

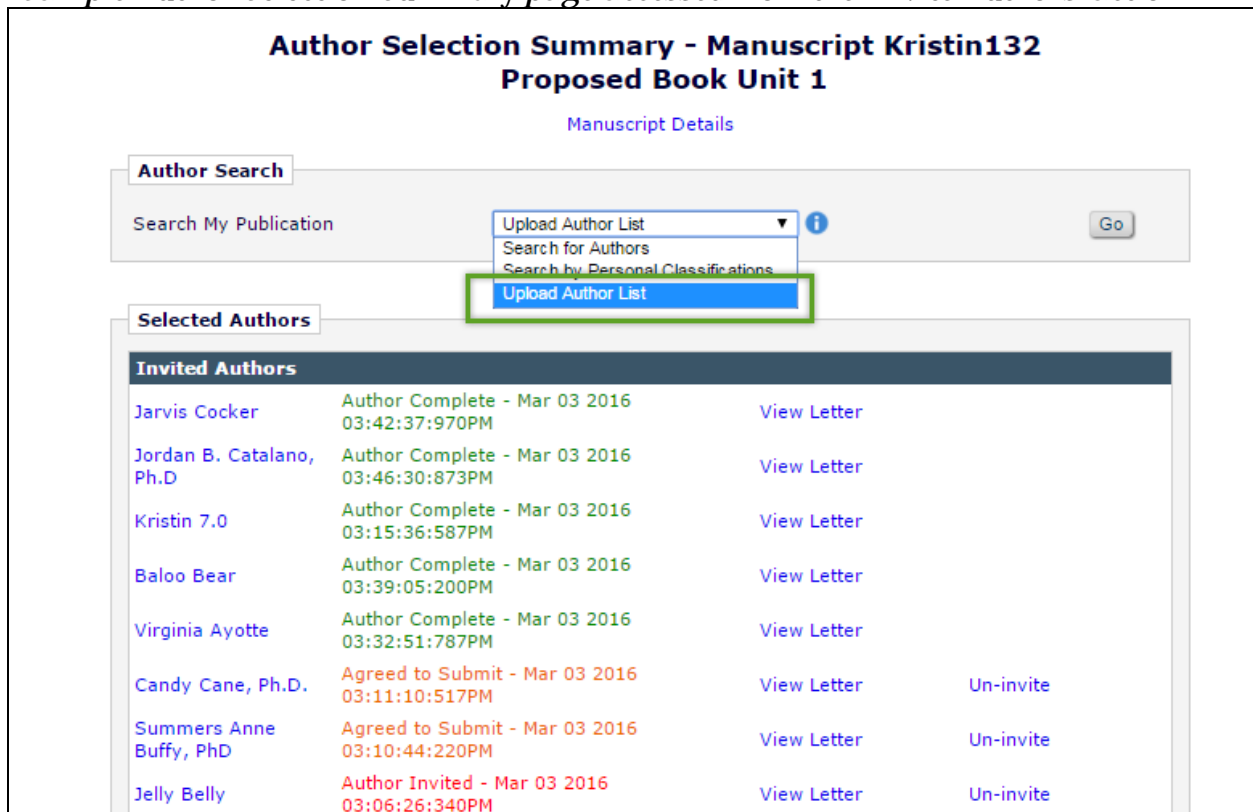
Upload Author List File (ALF) for Invited Submission Workflows

In EM version 12.2, Authors may be invited to submit to a Proposal or Commentary by an Editor via the 'Invite Authors' interface. Editors may choose to search for Authors (or Alternative Authors) by Personal Classifications or by entering other criteria (such as 'last name').

New in EM version 13.0, publications may upload an external list file (.csv, .tab, .txt) previously prepared in a standardized format. The Author List File (ALF) contains the intended Authors' names, e-mail addresses, ORCID iD (optional), and a 'Note' field (optional).

This new option – 'Upload Author List' - may be selected from the 'Search My Publication' drop down list on the Author Selection Summary page.

Sample Author Selection Summary page accessed from the 'Invite Authors' action link



**Author Selection Summary - Manuscript Kristin132
Proposed Book Unit 1**

Manuscript Details

Author Search

Search My Publication Upload Author List Search for Authors Search by Personal Classifications Go

Selected Authors

Invited Authors

Jarvis Cocker	Author Complete - Mar 03 2016 03:42:37:970PM	View Letter	
Jordan B. Catalano, Ph.D	Author Complete - Mar 03 2016 03:46:30:873PM	View Letter	
Kristin 7.0	Author Complete - Mar 03 2016 03:15:36:587PM	View Letter	
Baloo Bear	Author Complete - Mar 03 2016 03:39:05:200PM	View Letter	
Virginia Ayotte	Author Complete - Mar 03 2016 03:32:51:787PM	View Letter	
Candy Cane, Ph.D.	Agreed to Submit - Mar 03 2016 03:11:10:517PM	View Letter	Un-invite
Summers Anne Buffy, PhD	Agreed to Submit - Mar 03 2016 03:10:44:220PM	View Letter	Un-invite
Jelly Belly	Author Invited - Mar 03 2016 03:06:26:340PM	View Letter	Un-invite

After selecting the 'Upload Author List' option and clicking the 'Go' button, the user is taken to a new 'Upload Author List' interface.

Sample Upload Author List page – no file has been uploaded

Author List File - Manuscript Kristin132
Proposed Book Unit 1

Upload Author List

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

Browse your computer:

Or Drag & Drop a File Here

No Author List File has been uploaded for this submission.

When the ALF is uploaded, Editorial Manager validates the file and presents the Editor with an overlay with a grid of potential Author records culled from the ALF. If there are incomplete or incorrectly formatted records (for example, if the Author’s first name was not provided), an alert will display next to those items in the grid and the ‘Ignore’ checkbox is automatically selected. The ‘Ignore’ checkbox may also be manually selected for valid ingested Author records if the Editor decides to immediately not include them in the process.

Sample overlay after an ALF is uploaded – all records are valid

Author Candidates

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

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

Invitation	FIRSTNAME	LASTNAME	EMAIL	ORCID	Title	NOTE	Ignore
True	Mike	Di Natale	mdinatale@ariessys.com;mdinatale@gmail.com	0000-0002-0136-5875		Chapter 1	<input type="checkbox"/>
True	Mike	Di Natale	mdinatale@ariessys.com;mdinatale@gmail.com	0000-0002-0136-5875		Chapter 1 again!	<input type="checkbox"/>
True	Caroline	Webber	cwebber@ariessys.com	0000-0002-6783-1234		Chapter 3	<input type="checkbox"/>
True	Janet	Swatski	jsawtski@ariessys.com	0000-0003-6310-5785			<input type="checkbox"/>
False	Sally	Ubnoske	subnoske@ariessys.com;subnoske@ariessc.com			Chapter 2	<input type="checkbox"/>
True	Mike	Di Natale	mdinatale@ariessys.com;mdinatale@gmail.com	0000-0002-0136-5875		Chapter 4	<input type="checkbox"/>
False	Dumby	Donnie	1@1.com			AHAHA	<input type="checkbox"/>
False	Dumby	Donnie	1@1.com			AHAHA2	<input type="checkbox"/>
True	Dumby	Donnie	1@1.com			32323232	<input type="checkbox"/>

Clicking the 'Import' button ingests the valid Author records to the new "Author Candidates' Results" page. During ingest, Editorial Manager attempts to match the e-mail address and/or ORCID iD of the ALF Author records to existing users in the publication's EM database.

Sample 'Author Candidates' Results' page – no matches were found in the publication database

**'Author Candidates' Results - Manuscript Kristin132
Proposed Book Unit 1**

Author List File

File Name	File Size	Last Modified	Actions
out of order ALF.txt	653 Bytes	Mar 15 2016 12:56:00:809PM	Remove

Author Candidates

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

Page: 1 of 1 (5 total Authors) Display 10 results per page.

Select	Number of Invitation Letters	Author Name	Board Member	Submissions Being Processed		Author Statistics	Invitation Statistics
				Invited	Unsolicited		
<input checked="" type="checkbox"/>	3	No Match Found; Account will be proxy-registered Information from File: Mike Di Natale mdinatale@ariessys.com;mdinatale@gmail.com 0000-0002-0136-5875 Note: Chapter 1 Note: Chapter 1 again! Note: Chapter 4	No	0	0		
<input checked="" type="checkbox"/>	1	No Match Found; Account will be proxy-registered Information from File: Caroline Webber cwebber@ariessys.com 0000-0002-6783-1234 Note: Chapter 3	No	0	0		
<input checked="" type="checkbox"/>	1	No Match Found; Account will be proxy-registered Information from File: Janet Swatski jswatski@ariessys.com 0000-0003-6310-5785	No	0	0		
<input type="checkbox"/>		No Match Found; Account will be proxy-registered Information from File: Sally Ubnoske subnoske@ariessys.com;subnoske@ariessc.com Note: Chapter 2	No	0	0		
<input type="checkbox"/>		No Match Found; Account will be proxy-registered Information from File: Dumby Donnie 1@1.com Note: AHAHA Note: AHAHA2 Note: 32323232	No	0	0		

Page: 1 of 1 (5 total Authors) Display 10 results per page.

[Cancel](#) [Proceed](#)

If the value in the 'Invitation' column of the ALF is 'True', the record will be automatically selected on the "Author Candidates' Results" page. Also, if there are multiple records for the same user ("Mike Di Natale" in the examples above), Editorial Manager translates the multiple instances of the same author into multiple invitations sent for the user.

Proceeding from the page with selected Authors matched to EM user accounts will take the user to the Select Authors – Confirm Selections and Customize Letters page. Proceeding from the page with selected Authors currently not matched with an existing EM user account will perform proxy registration “behind the scenes” and the user is taken directly to the Select Authors – Confirm Selections and Customize Letters page. Any text entered into the ‘NOTE’ field in the ALF will be imported to the ‘Invitation Notes’ field.

Sample Select Authors – Confirm Selections and Customize Letters page after proceeding from the “Author Candidates’ Results” page

Select Authors - Confirm Selection and Customize Letters

You have selected the following people as potential Authors. [\(more...\)](#)

Target Publication Information: Date: Mar 10 2020 12:00:00:000AM Volume: 1 Issue: Unspecified

Authors to Invite [Open Special Character Palette](#)

Name	Letter / Invitation Notes To Author	Article Title	Invited Author Response Due Date	Author Submission Due Date	Do Not Invite
Mike Di Natale	<div style="border: 1px solid gray; padding: 2px;"> Author Questionnaire Author Invitation HTML Customize </div> Chapter 1	Full Title: Bourne! <input type="checkbox"/> Lock title(s) for Author	03/25/2016 <small>(mm/dd/yyyy)</small>	12/23/2019 <small>(mm/dd/yyyy)</small>	<input type="checkbox"/>
Mike Di Natale	<div style="border: 1px solid gray; padding: 2px;"> Author Questionnaire Author Invitation HTML Customize </div> Chapter 1 again!	Full Title: <input type="checkbox"/> Lock title(s) for Author	03/25/2016 <small>(mm/dd/yyyy)</small>	12/23/2019 <small>(mm/dd/yyyy)</small>	<input type="checkbox"/>
Mike Di Natale	<div style="border: 1px solid gray; padding: 2px;"> Author Questionnaire Author Invitation HTML Customize </div> Chapter 4	Full Title: <input type="checkbox"/> Lock title(s) for Author	03/25/2016 <small>(mm/dd/yyyy)</small>	12/23/2019 <small>(mm/dd/yyyy)</small>	<input type="checkbox"/>
Caroline Webber	<div style="border: 1px solid gray; padding: 2px;"> Author Questionnaire Author Invitation HTML Customize </div> Chapter 3	Full Title: <input type="checkbox"/> Lock title(s) for Author	03/25/2016 <small>(mm/dd/yyyy)</small>	12/23/2019 <small>(mm/dd/yyyy)</small>	<input type="checkbox"/>
Janet Swatski	<div style="border: 1px solid gray; padding: 2px;"> Author Questionnaire Author Invitation HTML Customize </div> 	Full Title: <input type="checkbox"/> Lock title(s) for Author	03/25/2016 <small>(mm/dd/yyyy)</small>	12/23/2019 <small>(mm/dd/yyyy)</small>	<input type="checkbox"/>

Others Notified of Author Invitation

Name	Letter	Customize	Do Not Send
Mary Shelby Roman (MANAGING EDITOR)	Ad Hoc 3 Test	Customize	<input type="checkbox"/>
Mary Shelby Roman (MANAGING EDITOR)	Ad Hoc 3 Test	Customize	<input type="checkbox"/>
Mary Shelby Roman (MANAGING EDITOR)	Ad Hoc 3 Test	Customize	<input type="checkbox"/>
Mary Shelby Roman (MANAGING EDITOR)	Ad Hoc 3 Test	Customize	<input type="checkbox"/>
Mary Shelby Roman (MANAGING EDITOR)	Ad Hoc 3 Test	Customize	<input type="checkbox"/>

Submitting the page will perform the invitations as it does in existing functionality.

TO CONFIGURE:

An ALF file must be created. The file can either be tab delimited (.tab, .txt) or comma separated value (.csv, .txt). Seven fields (headers) are used to create the file:

- Three required fields must be present in the ALF and have associated values:
 - FIRSTNAME
 - LASTNAME
 - EMAIL
- Four optional fields can be included in the ALF, but are not needed to proceed with ALF import:
 - NOTE
 - Any comments or invitation notes
 - ORCID
 - INVITE
 - 'True' = automatically selected for invitation
 - 'False' = not selected for invitation
 - TITLE
 - Predefined Article Title

NOTE: The order of the headers is irrelevant so long as the information on the lines below match up with the headers.

Sample screenshot of a sample ALF

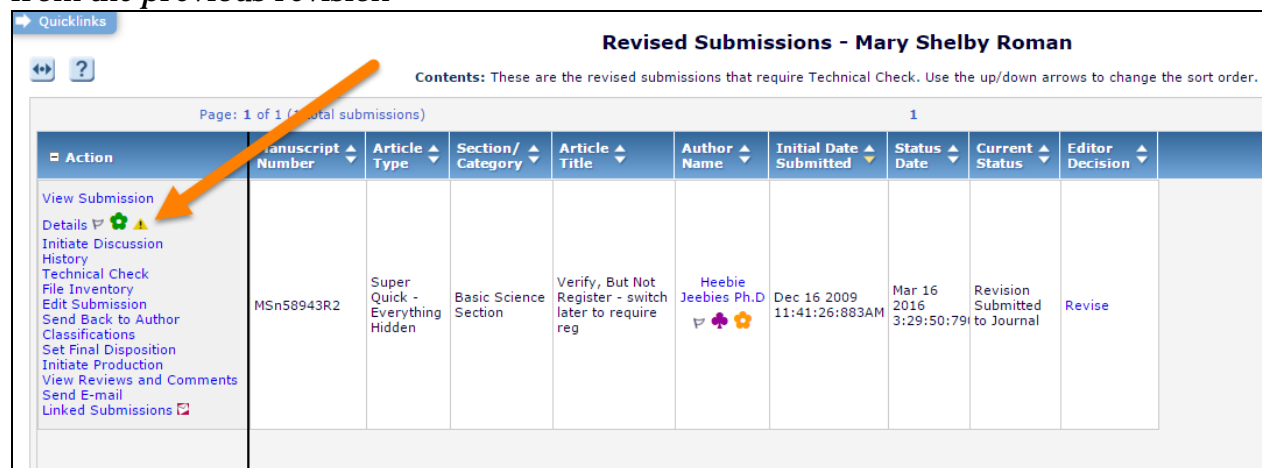
	A	B	C	D	E	F	G
1	LASTNAME	INVITE	ORCID	FIRSTNAME	EMAIL	NOTE	TITLE
2	Di Natale	TRUE	0000-0002-0136-5875	Mike	mdinatale@ariesss.com;mdinatale@gmal.com	Chapter 1	Bourne!
3	Di Natale	TRUE	0000-0002-0136-5875	Mike	mdinatale@ariesss.com;mdinatale@gmal.com	Chapter 1 again!	
4	Webber	TRUE	0000-0002-6783-1234	Caroline	cwebber@ariesss.com	Chapter 3	
5	Swatski	TRUE	0000-0003-6310-5785	Janet	jsawtski@ariesss.com		
6	Ubnoske	FALSE		Sally	subnoske@ariesssys.com;subnoske@ariessc.com	Chapter 2	Bored
7	Di Natale	TRUE	0000-0002-0136-5875	Mike	mdinatale@ariesss.com;mdinatale@gmal.com	Chapter 4	
8	Donnie	FALSE		Dumby	1@1.com	AHAHA	
9	Donnie	FALSE		Dumby	1@1.com	AHAHA2	booed
10	Donnie	TRUE		Dumby	1@1.com	32323232	
11							
12							

Enhanced Author List Change Visibility

In EM version 12.2, a Corresponding Author is allowed to change the list of Authors associated with a submission as part of the process of submitting a revision (at the *Add/Edit/Remove Authors* step). They can add or remove Co-Authors, change the Corresponding Author designation and/or update information relating to any author. An Editor is also allowed to edit the Author list at any other time, via the Edit Submission link and using either the short submission (metadata only) or full Edit Submission interface (with PDF rebuild).

New in EM version 13.0, Editors and Corresponding Authors will have visibility to changes made to the Author list between the current revision and the previous version by an EM warning triangle indicator (⚠) displayed in select Editor folders, the *Details* page and Technical Check page and change warning messages indicating the qualified change are added to the *Author Details* page. Additionally, the 'Author Status' link is now available to Editors whenever there is a co-author associated with the submission, regardless of the way the 'Register/Verify Other Authors' parameter is configured for the Article Type.

Sample Revised Submissions folder with new indicator of a change to the Author List from the previous revision



Quicklinks

Revised Submissions - Mary Shelby Roman

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

Page: 1 of 1 (1 total submissions)

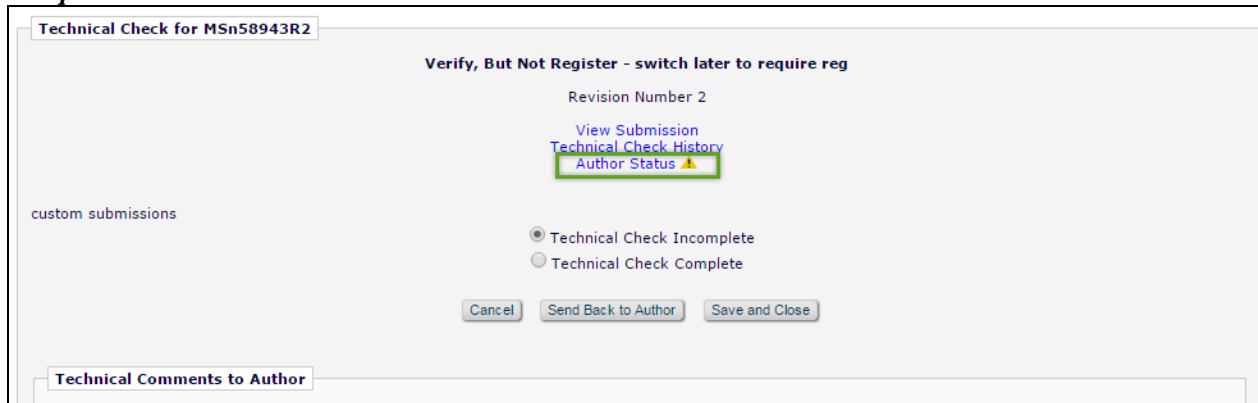
Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Decision
View Submission Details ⚠ Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Classifications Set Final Disposition Initiate Production View Reviews and Comments Send E-mail Linked Submissions	MSn58943R2	Super Quick - Everything Hidden	Basic Science Section	Verify, But Not Register - switch later to require reg	Heebie Jeebies Ph.D	Dec 16 2009 11:41:26:883AM	Mar 16 2016 3:29:50:79	Revision Submitted to Journal	Revise

The Author List Change warning icon is displayed next to the Details page action link in the following Editor folders:

- **Revised Submissions** (for publications using Technical Check)
- **Revised Submissions Requiring Assignment**
- **Search Submissions Results** (if the submission can also currently be located in the 'Revised Submissions or 'Revised Submissions Requiring Assignment' folders)

The warning icon will appear next to the 'Author Status' link on the Technical Check (if enabled) and *Details* pages.

Sample Technical Check page with new indicator of a change to the Author List from the previous Revision



Clicking the 'Author Status' link from either the *Details* page or the 'Technical Check' page will bring the user to an updated version of the 'Author Details' page. Red text next to the Author records will indicate what kind of change was made between the previous version of the revision and the current revision. The red informational text persists until a new revision is submitted.

A new 'Added in Revision' column is displayed in the Co-Author grid, indicating during which revision the Co-Author was added and by whom. A new 'Removed Authors' section displays Authors that have been removed from the submission and information about when they were removed, by whom, and if they had previously verified co-authorship on the submission ('Confirmed?' column).

Sample Author Details page (Editor version) – a new author has been added and a new Contributor Role has been added.

Author Details for Manuscript Number: MSn58943
Verify, But Not Register - switch later to require reg

Corresponding Author Status

Order	Author Name	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	Heebie Jeebies		trash25@ariessc.com				View Author Details

Other Author Status

Order	Author Name	Added in Revision	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
2	Tony Stark New	R2-Heebie Jeebies	Conceptualization New (Lead)	Edit				No Response	Resend Letter View Author Details
3	Big Al New	R2-Mary Shelby Roman	Formal analysis New (Lead)	Edit		Ph.D		No Response	Resend Letter View Author Details

To update the Co-Author's e-mail address that is associated with the submission, please click on the 'Edit' link. To save your changes please click on the 'Save' link.

To resend letters to all Other Authors with a status of 'No Response' and send letters requesting verification to Other Authors who have never been notified, click the 'Send Letters' button. To send an individual letter, please use the link next to that Author's name.

Removed Authors

Author Name	Removed in Revision	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?
Hot Toddy	R2-Mary Shelby Roman		trash0@ariessc.com				No Response

Sample Author Details page (Author version – read only view)

Author Details for Manuscript Number: MSn58943
Verify, But Not Register - switch later to require reg

Corresponding Author Status

Order	Author Name	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Options
1	Heebie Jeebies		trash25@ariessc.com				

Other Author Status

Order	Author Name	Added in Revision	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
2	Tony Stark <i>New</i>	R2	Conceptualization <i>New (Lead)</i>					No Response	
3	Big Al <i>New</i>	R2	Formal analysis <i>New (Lead)</i>			Ph.D		No Response	

Removed Authors

Author Name	Removed in Revision	Contributor Roles	E-mail Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?
Hot Toddy	R2		trash0@ariessc.com				No Response

Note that the Author version of the Author Details page omits information about who added or removed Co-Authors.

The warning icon about an Author List change will display if one or more of the following changes are made to the Author list between the current version of the revision and the previous version:

- Order of the Author(s) changed
- Corresponding Author Changed
- Co-Author Added or Removed
- Co-Author Added or Removed via Proxy
- Contributor Roles Added/Removed (for publications using CRediT Taxonomy)
- Change to existing author record (first name, last name, e-mail, address, institution)

TO CONFIGURE:

No configuration is necessary.

Enhanced Security for Files Downloaded from PDF

In EM version 12.2, submission items can be configured to provide a link to the source file in the system PDF. This setting for a submission item is applied to both the Author/Editor PDF and the Reviewer PDF.

New in EM version 13.0, the submission item PDF handling is split into two options so publications can choose to have the submission item handled differently in the Author/Editor PDF or Reviewer PDF. This offers the publications more control over the visibility of hyperlinks in PDFs built by Editorial Manager.

Additionally, a “behind-the-scenes” setting is added (enabled by Aries Account Coordinators) that requires users to login to Editorial Manager to download a source file from a PDF. If a link to a source file in the system PDF is clicked, the user is delivered to the EM login page. After a successful login, the source file download will commence.

NOTE: If the publication requires a user to login to download source files from hyperlinks in PDFs and the user is already logged into an EM session, they do not need to re-enter their login credentials to download the file.

TO CONFIGURE:

To enable the setting that requires an EM login prior to downloading a source file from a hyperlink in submission PDF, contact your Aries Account Coordinator.

To configure different PDF handling settings for the Author/Editor PDF and the Reviewer PDF, go to the ‘Edit Submission Items’ page in *PolicyManager*. Add or edit an existing submission item. Under the ‘This Submission Item Type is a Companion File (not built into PDF)’ option, the PDF handling is split into two drop down menus: Reviewer PDF and Author/Editor PDF. System Administrators can choose to handle the submission item differently for both PDFs.

Sample Edit Submission Item page

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

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

Reviewer PDF Handling:

Author/Editor PDF Handling:

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

URL/URI/External Resource Entry (in lieu of file upload) :

- Display with automatic line numbering in PDF
- Include this Item Type for Artwork Quality Checking
- Include this Item Type for checkCIF
- Include this Item Type for Reference Checking
- This Item Type will contain reference annotations. [Example](#)

Customized PDF Build Page Text

In EM/PM version 12.2, a user is presented with a standard 'Building PDF' page after clicking 'Build PDF for My Approval' at the end of the submission or edit submission process. This page is meant to instruct the user about the next steps to take in the submission process. There are six different versions of this page, depending on whether the user is acting as an Author, Editor, or Publisher, and depending on whether the user is working on a new submission, revised submission, or proposal.

In EM/PM version 13.0, the instructions displayed on the 'Building PDF' page may be customized. Like other custom instructions interfaces within Editorial Manager *PolicyManager*, the current, EM-provided instructions are designated as the 'Default' instructions.

Sample Building PDF page for an Author submitting a new submission – “instructional” text has been customized

PLEASE NOTE:

HEY LOOK EVERYONE! THIS PAGE HAS BEEN CUSTOMIZED!

Not only do I love cats, but I also love submitting manuscripts for peer review!

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

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

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

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

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

Please do not click the Back button

[Submissions Waiting for Author's Approval](#)
[Back to Main Menu](#)

TO CONFIGURE:

To create customized text to display on the 'Building PDF' page, go to the 'Edit Manuscript Submission Instructions' page in *PolicyManager* (located in the 'Submission Policies' section). New text boxes have been added to this page to allow custom instructions for all versions of the 'Building PDF' page. Edit the text as desired and click the 'Update' button.

Sample Edit Manuscript Submission Instructions page – new customized instructions options outlined in green

Edit Manuscript Submission Instructions

Edit the text to appear at each step of the manuscript submission process and click "Update". Click "View Default Instructions" to see default instructions. Click "Revert to Default Instructions" to revert the manuscript to the default. HTML tags and special characters may be used.

If you have configured one or more steps to be "Required" for an Article Type, the following text will display (as the first instruction on the page) when the Author reaches this step of the Manuscript Submission process: **[STEP] is Required for Submission.**

Manuscript Submission Step	New Submission Instructions	Revised Submission Instructions
Omitted parts of page unchanged		
Select Article Type	Choose the article type of your submission from the pull-down menu.	Change the article type of your submission from the pull-down menu if necessary.
Attach Files Summary Page	Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required items are marked with *. You can change the order by re-numbering the files.	Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required items are marked with *. You can change the order by re-numbering the files.
Building PDF Page (For Author submitting/editing a new submission/revision)	<pre><center>HEY LOOK EVERYONE! THIS PAGE HAS BEEN CUSTOMIZED!</center>
<font="Shonard Gothic" color="green">Not only do I love cats, but I also love submitting manuscripts for peer review!
<p>PLEASE NOTE: Your submission has not yet been sent to the editorial office.</p><p>Your submission is being created. Editorial Manager is taking the files you</pre>	<pre><p>PLEASE NOTE: Your submission has not yet been sent to the editorial office.</p><p>Your submission is being created. Editorial Manager is taking the files you submitted and creating a PDF.</p>Please go to the <i>Revisions Waiting for Author's Approval</i> page, where a link to the PDF will appear after it has been built. You must view the PDF and approve your submission. Please read the</pre>
Building PDF page (For Editor editing a submission)	<pre><p>PLEASE NOTE: The PDF for the edited submission is currently being rebuilt.</p><p>When it is complete, you must go to the <i>Submissions Needing Approval by Editor</i> page, and View the submission PDF for accuracy and completeness before taking additional action. You may then take one of the following actions:
<i>Approve Submission - if you are satisfied with the PDF, and do not require</pre>	<pre><p>PLEASE NOTE: The PDF for the edited submission is currently being rebuilt.</p><p>When it is complete, you must go to the <i>Submissions Needing Approval by Editor</i> page, and View the submission PDF for accuracy and completeness before taking additional action. You may then take one of the following actions:
<i>Approve Submission - if you</pre>
Building PDF page (For Publisher editing a submission)	<pre><p>PLEASE NOTE: The PDF for the edited submission is currently being rebuilt.</p><p>When it is complete, you must go to the <i>Submissions Needing Approval by Publisher</i> page, and View the submission PDF for accuracy and completeness before taking additional action. You may then take one of the following actions:
<i>Approve Submission - if you are</pre>	<pre><p>PLEASE NOTE: The PDF for the edited submission is currently being rebuilt.</p><p>When it is complete, you must go to the <i>Submissions Needing Approval by Publisher</i> page, and View the submission PDF for accuracy and completeness before taking additional action. You may then take one of the following actions:
<i>Approve Submission - if you are</pre>
Building PDF page (For Editor creating an editorial submission)	<pre><p>PLEASE NOTE: The Editorial submission process has not yet been completed.</p><p>A PDF is being created for your Editorial Submission.</p>Please go to the <i>Editorial Submissions In Progress</i> folder to View the PDF and Approve the Submission. Once approved, you will be able to place the submission into the regular submission workflow, or if you have sufficient</pre>	<pre><p>PLEASE NOTE: The Editorial submission process has not yet been completed.</p><p>A PDF is being created for your Editorial Submission.</p>Please go to the <i>Editorial Submissions In Progress</i> folder to View the PDF and Approve the Submission. Once approved, you will be able to place the submission into the regular submission workflow, or if you have sufficient</pre>
Building PDF page (For Editor creating/editing a proposal)	<pre><p>PLEASE NOTE: Your proposal is being created.</p><p>Editorial Manager is taking the files you submitted and creating a PDF.</p>You must view the PDF and approve your proposal. Please Read the instructions below.</p><p>The PDF for your proposal is currently being built. When it is complete, it will appear in <i>Proposals Needing Approval</i> folder. Please go to this page. You can then View</pre>	<pre><p>PLEASE NOTE: Your proposal is being created.</p><p>Editorial Manager is taking the files you submitted and creating a PDF.</p>You must view the PDF and approve your proposal. Please Read the instructions below.</p><p>The PDF for your proposal is currently being built. When it is complete, it will appear in <i>Proposals Needing Approval</i> folder. Please go to this page. You can then View</pre>
Select Document Classification popup window	Please identify your submission's areas of interest and specialization by selecting one or more classifications from the list below. Click 'Submit' at the bottom of the page when you are done.	Please identify your submission's areas of interest and specialization by selecting one or more classifications from the list below. Click 'Submit' at the bottom of the page when you are done.

Customized PDF Watermarks

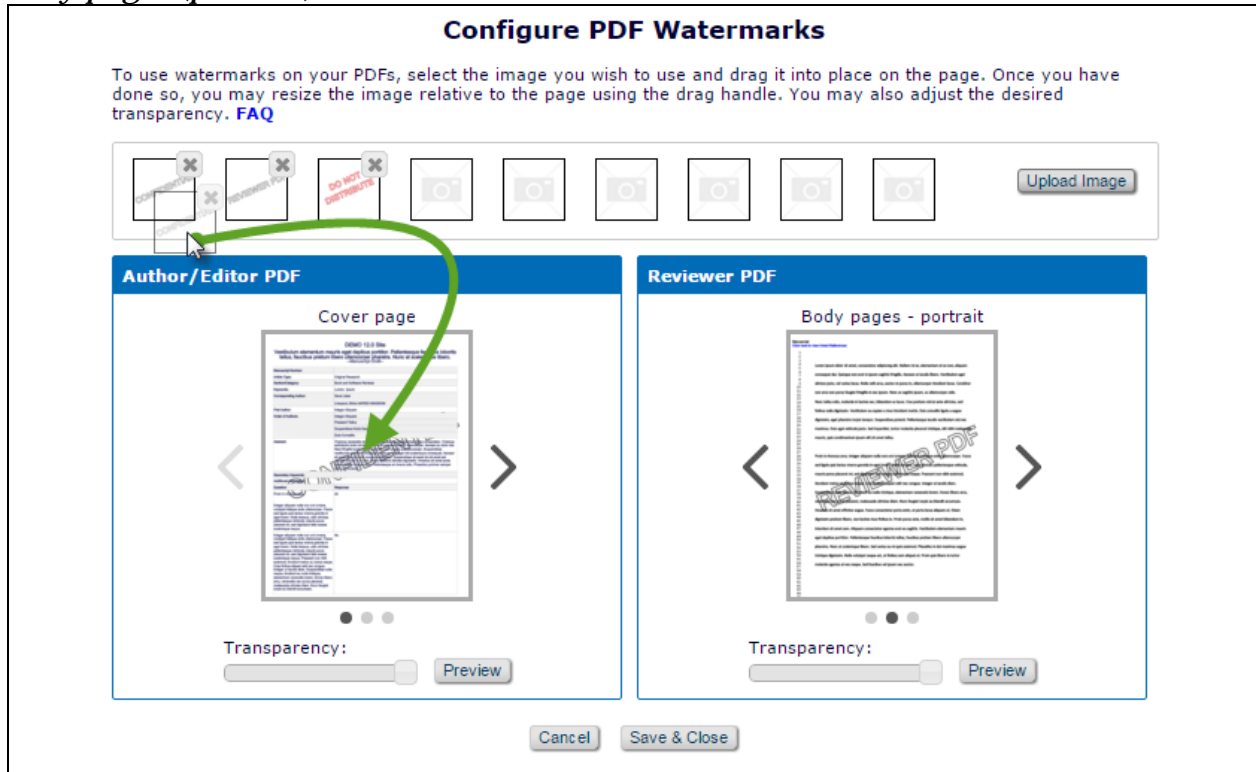
New in version 13.0, administrators may add “watermark” graphics to the PDFs that are built by the Editorial Manager system. This feature is great for publications that wish to brand their PDFs with publisher, society, or publication logos and messages.

A new ‘Configure PDF Watermarks’ page in *PolicyManager* allows publication administrators to:

1. Upload images (up to 9 images may be in the image library at one time, and there is a 500KB size limit on the images)
2. Choose one of the uploaded images to use for each of the following (if desired):
 - a. Author/Editor PDFs
 - i. Cover Page
 - ii. Body pages (portrait orientation)
 - iii. Body pages (landscape orientation)
 - b. Reviewer PDFs
 - i. Cover Page
 - ii. Body pages (portrait orientation)
 - iii. Body pages (landscape orientation)
3. Preview/print a sample PDF page for each variation
4. Save the configuration for use in all PDFs built from that point

Upon upgrade, three watermark images are available for convenience: “Confidential,” “Reviewer PDF,” and “Do Not Distribute.”

Sample Configure PDF Watermarks page with two of the pre-loaded watermark images added to the Author/Editor PDF cover page and the Reviewer PDF body pages (portrait)

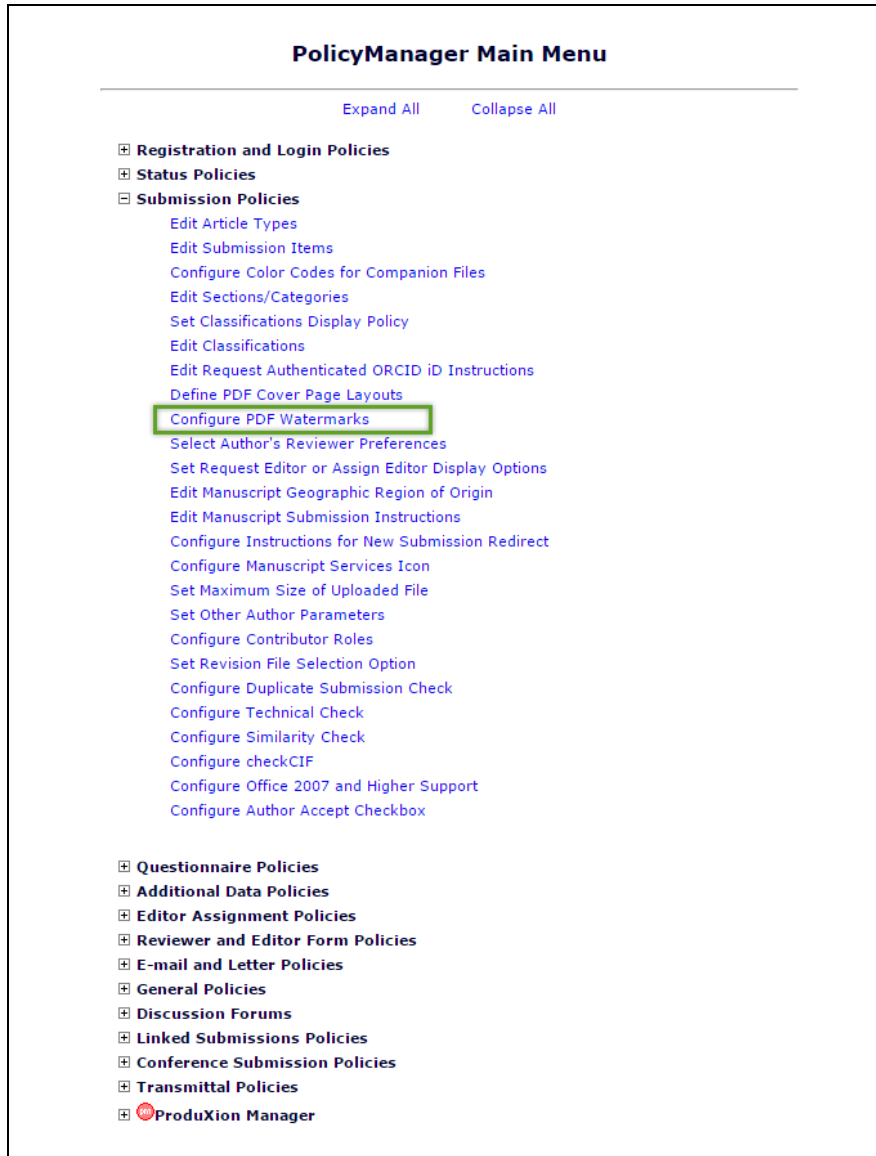


Custom images can be uploaded by clicking the 'Upload Image' button.

To use the tool, drag an image square from the gallery on the top of the page to desired PDF. Dragging the lower right corner of the image on the PDF thumbnail will scale the image larger (or smaller) and the image can be moved around as necessary by dragging and dropping the square within the PDF preview layout. Clicking the 'X' button on the corner of the image will remove it from the PDF thumbnail preview. Clicking the arrows on either side of the preview thumbnails for the PDF will display small-scale mockups of the cover page, the body pages (portrait orientation), and the landscape orientation body pages. The 'Transparency' slider along the bottom of each thumbnail PDF preview allows for adjustment of the opacity of the watermark. Clicking the 'Preview' button will open the layout in a new browser tab and display the watermark at full-size.

TO CONFIGURE:

Go to the new 'Configure PDF Watermarks' page in *PolicyManager* in the 'Submission Policies' section:



Once on the new 'Configure PDF Watermarks' page, you can upload custom images, drag and drop images from the gallery onto sample PDF layouts, experiment with transparency, preview the full-size results, and save your new PDF watermark to use this feature for all newly-built PDFs!

PowerGrid Added to Additional Areas

In EM/PM version 12.2, the PowerGrid was 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'

New in EM/PM version 13.0, the PowerGrid continues replace the traditional EM grids in additional places:

- Search Proposals
- Production Status Grid (Interactive View Replaced, Traditional View still available)
- View All Submissions in Production
- Submissions Out for Revision
- All Submissions with Editor's Decision

Any icon buttons added to the top of the PowerGrid feature hover-text that explains the purpose of each button.

Sample Production Status Grid using the PowerGrid

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Production Started	Submission Target Online Date	PAPI	Task Track	Copy Editing	G
Production Details History Transmittal Form Assign Production Task Assign to Schedule Group File Inventory Send E-mail Linked Submissions	MSNjfs8		Mary Shelby Roman	Testing Custom Submission Flags with AMD		10/28/2009 12:40:29	11/01/2018 00:00:00				
Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory Send E-mail Linked Submissions	MSN998		Heebie Jeebies Ph.D.	Testing Solicit Commentary.		10/01/2009 15:29:19	Submitted Nov 08 2009 12:00:00:00AM Lester Bangs				

TO CONFIGURE:

No configuration necessary.

Proxy as User after Proxy Registration

In EM version 12.2, users with 'Proxy Register' permission can create user accounts on behalf of other people. Proxy registering a user during a workflow, such as 'Invite Reviewer' or 'Invite Author,' conveniently takes the Editor immediately to the next step in the workflow (i.e. sending the invitation). However, Proxy Registering a user from the *Editor Main Menu* and *Search People* interfaces requires multiple actions to be taken before the Editor can proxy as the newly registered user.

New in EM version 13.0, the standard yellow-highlighted proxy links are available on the confirmation screen immediately following a successful proxy registration of a new user for Editors with 'Proxy for Authors' and/or 'Proxy for Reviewers' permission(s).

NOTE: This applies to proxy registrations initiated via the 'Register New User' link on the *Editor Main Menu* and *Search People – Search Results*. There are no changes to proxy registrations initiated via the Invite Reviewer or Invite Author workflows.

Sample Proxy Registration Complete Confirmation page – Editor has 'Proxy for Authors' and 'Proxy for Reviewers' permissions and the newly registered user was given a Reviewer Role



TO CONFIGURE:

No configuration necessary. This feature is automatically available to Editors with the following permissions enabled in Editor *RoleManager*:

- 'Proxy Register New User'
- 'Proxy for Authors' and/or 'Proxy for Reviewers'
- OPTIONAL: 'Search People'

Customizable Funding Information Checkbox Text

In EM version 12.2, a Funding Information step can be added to the Author Submission workflow that can require the Author to fill out information about funders and grants related to the submission. A 'Funding Information is not available' checkbox is displayed on this page to allow Authors who may not have complete information about funding at the time to continue moving the submission in the workflow.

New in EM version 13.0, the text 'Funding Information is not available' may be modified or customized for the checkbox displayed Funding Information step in the submission workflow for original submissions and revisions. If the text is not customized, the standard 'Funding Information is not available' message will display.

Sample Funding Information submission step – checkbox text has been customized

New Submission

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

Funding Information

Funding Information is Required for Submission.

Please enter the funder name, grant number and the grant recipient. Authors listed in the dropdown menu were added during the Add/Edit/Remove Authors submission step. Click the '+' icon to add another funder. When you are finished, click the 'Next' button.

I have customized this text to meet my needs. Check this box if you love cats!

Current Funding Sources List + Add a Funding Source

There are currently no Funding Sources in the list

+ Add a Funding Source

Previous Next

TO CONFIGURE:

In the 'Submission Policies' section of *PolicyManager*, click the 'Edit Manuscript Submission Instructions' link. Once on the page, scroll to the 'Checkbox displayed when Funding Information is Required' row. Enter desired customized text or revert back to the default instructions.

Sample Edit Manuscript Submission Instructions page

Edit Manuscript Submission Instructions

Edit the text to appear at each step of the manuscript submission process and click "Update". Click "View Default Instructions" to see default instructions. Click "Revert to Default Instructions" to revert the manuscript to the default. HTML tags and special characters may be used.

*If you have configured one or more steps to be 'Required' for an Article Type, the following text will display (as the first instruction on the page) when the Author reaches this step of the Manuscript Submission process: **[STEP] is Required for Submission.***

Manuscript Submission Step	New Submission Instructions	Revised Submission Instructions
	Insert Special Character	
Select Article Type	Choose the article type of your submission from the pull-down menu.	Change the article type of your submission from the pull-down menu if necessary.
Enter Article Title	Enter the title of your submission. You cannot enter a submission without a title.	Revise the title of your submission if necessary. You cannot enter a submission without a title.
Add/Edit/Remove Authors	<p>Edited for fun! Enter the names of anyone who contributed to your submission by clicking 'Add Author'. The order of the authors may be changed by clicking the arrows. The first author of the submission may be indicated. Multiple Academic Degrees may be entered, separated by commas (M.D., PhD, JD). To change the corresponding author, enter the new corresponding author's name in the text</p> <p style="text-align: right;">↑ ↓</p>	<p>This is for a revision. Add the names of anyone who contributed to your manuscript and click 'Add Author'. To Edit or Remove a name click the appropriate link next to the name. The order of the authors may be changed by clicking the arrows. The first author of the manuscript may be indicated. Multiple Academic Degrees may be entered, separated by commas (M.D., PhD, JD). To change the corresponding author, enter the</p> <p style="text-align: right;">↑ ↓</p>
View Default Instructions	Revert to Default Instructions	Revert to Default Instructions
Funding Information	Please enter the funder name, grant number and the grant recipient. Authors listed in the dropdown menu were added during the Add/Edit/Remove Authors submission step. Click the '+' icon to add another funder. When you are finished, click the 'Next' button.	Please enter the funder name, grant number and the grant recipient. Authors listed in the dropdown menu were added during the Add/Edit/Remove Authors submission step. Click the '+' icon to add another funder. When you are finished, click the 'Next' button.
View Default Instructions	Revert to Default Instructions	Revert to Default Instructions
Checkbox Displayed when Funding Information is Required	I have customized this text to meet my needs. Check this box if you love cats!	Funding Information is not available.
View Default Instructions	Revert to Default Instructions	
Select Section/Category	Select the Section or Category related to your submission from the drop-down menu below.	Change the Section or Category related to your submission from the drop-down menu below if necessary.
View Default Instructions	Revert to Default Instructions	Revert to Default Instructions

Part of page omitted

checkCIF Integration

In EM/PM version 12.2, a submission item can be sent through Reference Checking, an external program that can link and/or clean up references. Submissions may be sent through CrossCheck/iThenticate to check for duplicate submissions and reduce plagiarism. Additionally, image submission items can be sent through Artwork Quality Check (AQC). The results of these tests may be viewed and sometimes downloaded in the Editorial Manager interface from the Action links (depending on user permissions).

New in EM/PM 13.0, a file with the extension .cif (Crystallographic Information Format) may be sent to a new “checkCIF” tool integrated into EM/PM. The checkCIF tool reports on the consistency and integrity of crystal structure determinations contained in the file. The tool is hosted by the IUCr (International Union of Crystallography), and the .cif files are sent via API.

As with other quality-checking features offered in EM/PM, the publication can configure when the file is sent out for testing. The following workflow points may be configured to send .cif file submission items to checkCIF:

- Original PDF Building by Author
- Original PDF Building by Editor
- First Reviewer Invited/Assigned for Original Submission
- Revised PDF Building by Author
- Revised PDF Building by Editor
- Author Notified of Editor Decision in the ‘Accept’ Decision Family
- Author Notified of Editor Decision in the ‘Revise’ Decision Family
- Create Submission

NOTE: .cif files cannot be built into EM PDFs. The Submission Item must be configured to ‘Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)’ or be configured as a companion file (“This Submission Item Type is a Companion File” checkbox selected) on the ‘Edit Submission Item Type’ page in *PolicyManager*.

Once a .cif file has returned results, a ‘View checkCIF Results’ link is displayed in the following folders (depending on the configured workflow points that trigger checkCIF):

- Author Interface (role has ‘View checkCIF Results’ permission in *RoleManager*):
 - Submissions Sent Back to Author
 - Submissions Waiting for Author’s Approval
 - Submissions Being Processed
 - Submissions Needing Revision
 - Revisions Sent Back to Author
 - Revisions Waiting for Author’s Approval
 - Revisions Being Processed
- Reviewer Interface (Reviewer Role has ‘View checkCIF Results’ permission in *RoleManager*):
 - Pending Assignments

- Completed Assignments
- Editor Interface (Editor Role has 'View checkCIF Results' permission in *RoleManager*):
 - New Submissions
 - Revised Submissions
 - New Submissions Requiring Assignment
 - Revised Submissions Requiring Assignment
 - View All Assigned Submissions
 - Direct-to-Editor New Submissions
 - Direct-to-Editor Revised Submissions
 - New Invitations (Suggest Editor publications only)
 - New Assignments
 - Production Initiated – No Tasks Assigned
 - View All Submissions in Production
 - Group by Editors I Assigned
 - Group by Editor with Current Responsibility
 - Group by Manuscript Status
 - Submissions out for Revision
 - My Assignments with Final Disposition
 - All Submissions with Final Disposition
 - Search Submissions (Action column – both Editorial & Production views)
 - Search Proposals (Action column)
 - Search Submissions (from the Proposal Menu)
 - Details page (if configured)
 - File Inventory
 - Technical Check (if configured)
- Publisher Interface (Publisher Role has 'View checkCIF Results' permission in *RoleManager*)
 - Accepted Submissions
 - Production Initiated – No Tasks Assigned
 - View All Submissions in Production
 - Search Submissions (Action column – both Editorial & Production views)

When the 'View checkCIF Results' link is clicked, the following popup is displayed:

checkCIF from IUCr journals - Submission CAROLINETEST120-D-06-00008
"This is my test article title"

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

Close

Submission Files

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

Companion Files (not built into the PDF)

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

Close

NOTE: If there is only one non-hidden checkCIF result, clicking the 'View checkCIF Results' link will initiate a download of the completed results PDF rather than displaying the pop-up.

Clicking the 'Completed' link in the checkCIF Results column will initiate the download of a PDF copy of the checkCIF results for that file. Clicking the 'Download' link allows the user to download the original .cif file.

Editor and Publisher Roles that have 'Initiate checkCIF' permission in *RoleManager* will be able to select files to send to checkCIF by selecting the checkbox next to the item type and clicking the 'checkCIF: Selected Files' button.

Sample checkCIF Results pop-up window for an Editor/Publisher Role with 'Initiate checkCIF' permission

checkCIF from IUCr journals - Submission CAROLINETEST120-D-06-00008
"This is my test article title with a super long title..."

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

checkCIF: Selected Files Close

Submission Files

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

Companion Files (not built into the PDF)

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

checkCIF: Selected Files Close

TO CONFIGURE:

Upon upgrade to version 13.0, checkCIF is enabled for all publications.

PolicyManager

The configuration of workflow trigger points and custom instructions can be accessed by a new page in *PolicyManager*: 'Configure checkCIF,' located in the 'Submission Policies' section. checkCIF may also be enabled and disabled from this page.

Sample PolicyManager page – location of new Configure checkCIF page outlined in green

PolicyManager Main Menu

[Expand All](#) [Collapse All](#)

- ☒ **Registration and Login Policies**
- ☒ **Status Policies**
- ☒ **Submission Policies**
 - Edit Article Types
 - Edit Submission Items
 - Configure Color Codes for Companion Files
 - Edit Sections/Categories
 - Set Classifications Display Policy
 - Edit Classifications
 - Edit Request Authenticated ORCID iD Instructions
 - Define PDF Cover Page Layouts
 - Configure PDF Watermarks
 - Select Author's Reviewer Preferences
 - Set Request Editor or Assign Editor Display Options
 - Edit Manuscript Geographic Region of Origin
 - Edit Manuscript Submission Instructions
 - Configure Instructions for New Submission Redirect
 - Configure Manuscript Services Icon
 - Set Maximum Size of Uploaded File
 - Set Other Author Parameters
 - Configure Contributor Roles
 - Set Revision File Selection Option
 - Configure Duplicate Submission Check
 - Configure Technical Check
 - Configure checkCIF**
 - Configure Office 2007 and Higher Support
 - Configure Author Accept Checkbox
- ☒ **Questionnaire Policies**
- ☒ **Additional Data Policies**
- ☒ **Editor Assignment Policies**
- ☒ **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 Configure checkCIF page – checkCIF is enabled upon upgrade

Configure checkCIF

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

Enable checkCIF

Select the workflow points that will trigger checkCIF:

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

Page	Instructions
View checkCIF Results	<p>Insert Special Character</p> <p>The files shown below are eligible for analysis using the checkCIF tool from the International Union of Crystallography (IUCr). If the files have already been sent to the checkCIF tool, the analysis report can be viewed by clicking the 'Completed' link.</p> <p>View Default Instructions Revert to Default Instructions</p>

Once checkCIF has been enabled on the 'Configure checkCIF' page in *PolicyManager*, Submission Items must be configured to be sent to checkCIF. On the 'Edit Submission Items' page in *PolicyManager*, add or edit an existing item type.

Sample Edit Submission Item Type page – PDF handling configuration options for .cif files are outlined in orange. The item must be configured so that it does not build into a PDF. The new checkCIF option is outlined in green.

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

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

Reviewer PDF Handling:

Author/Editor PDF Handling:

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

URL/URI/External Resource Entry (in lieu of file upload):

Display with automatic line numbering in PDF

Do Not Unpack Archive files (.ZIP, .tar) of this Type

Include this Item Type for checkCIF

Include this Item Type for Reference Checking

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

Restricted File Types

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

For a file that will not be built into either a Reviewer PDF or an Author/Editor PDF, you can allow all file types, or define either an exclusive list or an inclusive list.

- Allow all file types supported by the system (no publication file restrictions)
- Exclusive: Do not allow the file types selected on the list. File types not on the list are allowed.
- Inclusive: Allow only the file types selected on the list.

<p style="text-align: center;">New Submission</p> <p><input type="radio"/> Allow all file types</p> <p><input type="radio"/> Exclusive: Allow all file types except the ones selected on the list</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>Open Office PowerPoint (OPD)</p> <p>Open Office Word (ODT)</p> <p>Open Office Excel (ODS)</p> <p>PowerPoint 2007 (PPTM PPTX)</p> <p>Excel 2007 (XLSB XLSM XLSX)</p> <p>Word 2007 (DOCX DOCM DOTM DOTX)</p> <p>Compiled LaTeX File (DVI)</p> </div> <p><input type="radio"/> Inclusive: Allow only these files types</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>Open Office PowerPoint (OPD)</p> <p>Open Office Word (ODT)</p> <p>Open Office Excel (ODS)</p> <p>PowerPoint 2007 (PPTM PPTX)</p> <p>Excel 2007 (XLSB XLSM XLSX)</p> <p>Word 2007 (DOCX DOCM DOTM DOTX)</p> <p>Compiled LaTeX File (DVI)</p> </div>	<p style="text-align: center;">Revised Submission</p> <p><input type="radio"/> Allow all file types</p> <p><input type="radio"/> Exclusive: Allow all file types except the ones selected on the list</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>Open Office PowerPoint (OPD)</p> <p>Open Office Word (ODT)</p> <p>Open Office Excel (ODS)</p> <p>PowerPoint 2007 (PPTM PPTX)</p> <p>Excel 2007 (XLSB XLSM XLSX)</p> <p>Word 2007 (DOCX DOCM DOTM DOTX)</p> <p>Compiled LaTeX File (DVI)</p> </div> <p><input type="radio"/> Inclusive: Allow only these files types</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>Open Office PowerPoint (OPD)</p> <p>Open Office Word (ODT)</p> <p>Open Office Excel (ODS)</p> <p>PowerPoint 2007 (PPTM PPTX)</p> <p>Excel 2007 (XLSB XLSM XLSX)</p> <p>Word 2007 (DOCX DOCM DOTM DOTX)</p> <p>Compiled LaTeX File (DVI)</p> </div>
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A new 'Include this Item Type for checkCIF' option is available for submission items that are not configured to build into the PDF. If the item type is a companion file or is configured to 'Build Hyperlink to this Item into the PDF (Item Not Displayed in PDF)' for both the Reviewer & Author/Editor PDFs, the new checkCIF option should be available for selection.

Selecting the 'Include this Item Type for checkCIF' checkbox will send a .cif file uploaded as the configured item type to the checkCIF tool at the workflow point(s) selected on the 'Configure checkCIF' page in *PolicyManager*.

To configure the 'View checkCIF Results' link to appear on the custom *Details* page layouts, navigate to the 'Define Details Page Layouts' in the 'General Policies' section of *PolicyManager*. Add or edit an existing Custom Details page Layout. Click the 'Select Items to Display' link. Select the 'checkCIF Results' checkbox in the 'Links' section and Submit the page.

Sample Select Items to Display page

Select the information to appear on the Details page

* Items marked with an asterisk are subject to additional permissions, which may mean that some users will not be able to view them until you give them the additional permission to do so in RoleManager.

Expand All Collapse All

Links

- Blinded Editors *
- Technical Check *
- Additional Manuscript Details *
- Similarity Check *
- checkCIF Results
- Duplicate Submission Check *
- Select Submissions Flags *
- File Inventory *
- Publish Information
- Transmittal Form *
- Discussion Forum *
- Attachments *
- Author Questionnaire Summary (Responses for all Authors)
- Transferred Information
- Transferred Decision Letter

Information Submitted by Author

General Manuscript Information

Proposal Specific Information

Additional Manuscript Details

Key Workflow Dates and Status Information

Information for Invited Article Types

Assignments and Invitations

Publishing and Production Information

Expand All Collapse All

Cancel Submit

The position of the new 'checkCIF Results' link on the Details page may be rearranged when navigated back to the custom details layout.

RoleManager








Viewing the checkCIF results is permission-based. Only Roles with 'View checkCIF Results' permission enabled on their respective *RoleManager* pages will have access to the checkCIF results. Upon upgrade, 'View checkCIF Results' permission is disabled for all Roles & Role Families.

Sample Author Role page in RoleManager

Edit Role Definition

Role Name: Author

Check the functions that this role is permitted to perform.

- View Status Date
- View Current Status
- View Other Author Status
 - Manage Other Authors
 - Edit Other Author E-mail Address
- Allow Access to Reviewer Names and Reviews:
 - After Final Decision of Accept, Reject or Reject and Transfer
 - After First Decision
- Send Ad Hoc E-mail
- View Author Related Correspondence History
- View checkCIF Results
- Search Similar Articles in MEDLINE
- Display "Alternate Contact Information" Link on Main Menu
- Display "Unavailable Dates" Link on Main Menu
- Hide Manuscript Submission Interface
 - Display Invited Submission Folders
-  Order Electronic Reprints
-  View WebFirst Pages
 -  View Subscriber Version of WebFirst
 -  View Pay-per-View Version of WebFirst
-  Display Current Task Assignments on Main Menu
-  View Production Status
-  View Target Volume/Issue

Sample Reviewer Role page in RoleManager

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

[Expand All](#) [Collapse All](#)

- Permissions for New Reviewer Invitations**
- Permissions for Pending Assignments and Completed Assignments**
 - View Status History
 - View Correspondence History
 - View Corresponding Author
 - View checkCIF Results**
 - Upload Attachments on Reviewer Recommendation page
- Permissions for Completed Assignments Only**
- General Permissions (Applicable to All Reviewer Pages)**

Editors and Publishers can also have 'Initiate checkCIF' permission enabled. This permission governs whether the Editor or Publisher can send a file manually to the checkCIF tool via the 'checkCIF: Selected Files' button on the checkCIF results page.

Sample Editor Role page in RoleManager

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**
- Editor Assignment**
- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**
- General Searching and Viewing**
 - Use Editorial Details Layout | ▼
 - Search All Manuscripts
 - Search Only Assigned Manuscripts
 - Share Saved Searches
 - View Linked Submission Groups
 - Create/Edit Linked Submission Groups
 - 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
 - View Duplicate Submission Check Results
 - Initiate checkCIF
 - View checkCIF Results
 - View Editorial Status History
 - View Submission Production Status History
 - View Submission Production Task Assignment History
 - View Schedule Group Production Task Assignment History
 - View Editorial Correspondence History
 - Edit Letter when Resending
 - View Submission Production Correspondence History
 - View Schedule Group Production Correspondence History
 - Add/Edit External Correspondence
 - Add Attachments to External Correspondence
 - View All Submissions
 - View Completed Reviews Grid in Main Menu
 - View Additional Manuscript Details
 - Edit Additional Manuscript Details
 - View Notes on Manuscript Details
 - Edit Notes on Manuscript Details
 - Turn On Manuscript Notes Flag
 - Turn Off Manuscript Notes Flag
 - View Production Notes
 - Edit Production Notes
 - View Reviewer PDF
- Edit Submission**
- Discussion Forums**
- Transmittal Form**
- Sending E-mail**
- Viewing and Editing People Data**
- Flag Icons**
- Proxy Activities**
- Administrative and Reporting Functions**
- Cross-Publication Login**
- ProduXion Manager**

Sample Publisher Role page in RoleManager

Edit Role Definition

Role Name:*

Check the functions that this role is permitted to perform.

[Expand All](#) [Collapse All](#)

General Searching and Viewing

- Search Submissions
- View Submission
- View Manuscript Details
 - Use Editorial Details Layout
- View Production Notes
- Edit Production Notes
- View Manuscript Notes on Manuscript Details
- Edit Manuscript Notes on Manuscript Details
- View Editorial Correspondence History
- View Additional Manuscript Details
 - Edit Additional Manuscript Details
- Download Source Files
 - Download Companion Files
 - Upload, Hide and Restore Companion files
- View Duplicate Submission Check Results
- Initiate checkCIF
- View checkCIF Results
- View All Accepted Submissions
- View Linked Submission Groups
 - Create/Edit Linked Submission Groups
 - Set Active/Inactive Status on Linked Submission Groups
- Download Metadata
- Turn On Manuscript Notes Flag
- Turn Off Manuscript Notes Flag
- Send Ad Hoc E-mail
- Search Similar Articles in MEDLINE
- Search/Manage Conference Submissions

Flag Icons

Transmittal Form

Edit Submission

Cross-Publication Login

Produxion Manager

IMPORT ENHANCEMENTS

ScholarOne Import to ProduXion Manager

Manuscript Import to ProduXion Manager is available in version 12.2 using XML compliant with the Cadmus version 2.44 DTD. This method relies on an outside site ftp'ing a pair of [prefix].go.xml and [prefix].zip files to an Aries FTP server. The zip file contains an XML file compliant with the Cadmus DTD.

In 12.2 this method also is used to accept ftp'd files from ScholarOne sites. The ScholarOne sites create a .zip file containing an XML file compliant with the Cadmus DTD. After the XML file is separated from the S1 .zip, the submission can be sent to Aries.

Upon receipt and validation of the ftp'ed files in PM version 12.2, the submission is imported to the publication. The submission is imported with a Final Disposition of 'Accept' and with production initiated.

New in PM 13.0, the existing *Cadmus Manuscript Import (ProduXion Manager)* method is enhanced to meet additional requirements of users importing submissions from ScholarOne.

The feature no longer requires that users importing ScholarOne submissions to ProduXion Manager remove the Cadmus DTD-compliant XML file from the zip file prior to importing to PM. Users will now be able to export directly from ScholarOne to ProduXion Manager.

Additionally, Corresponding Authors who are already registered in EM will be identified upon import, and those who are not matched to existing EM user records will be registered at the time of import. Corresponding Author, First Author, and co-author information will be written to the EM database upon import as well. The First Author (if different from the Corresponding Author) and co-authors are also imported.

TO CONFIGURE:

Contact your Aries Account Coordinator to configure your ProduXion Manager site to accept imports from a ScholarOne site.

ScholarOne Import to Transferred Submissions Folder

In EM version 12.2, submissions may be transferred from a third-party Manuscript Service Provider, a non-EM publication upon FTP of an XML metadata file compliant with the JATS DTD, or another EM publication. Typically, these submissions are deposited into the publications' 'Transferred Submissions' folder.

New in EM version 13.0, users are able to import submissions directly from ScholarOne into Editorial Manager using an XML metadata file compliant with the Cadmus DTD. The imported submissions are deposited into the publication's 'Transferred Submissions' folder. Once imported, EM will match people in the XML metadata to their existing EM accounts. Corresponding Author, First Author, and any co-author information will be written to the EM database.

TO CONFIGURE:

Contact your Aries Account Coordinator to enable import from a ScholarOne site to an Editorial Manager site.

PUBLICATION CHARGES PROCESSING ENHANCEMENTS

Enhanced Resend Payment Request Availability

In EM version 12.2, publications can use a Publication Charges feature integrated into Editorial Manager that will direct Authors to an external payment system. Editorial Manager handles this in three steps:

- A) The estimate – This phase is triggered by an Author clicking ‘Build PDF for my Approval’ during the submission process. The author is able to view the Publication Charge estimate from the external payment system. Once the estimate has been viewed, the Author may agree to the Publication Charges and proceed to submit to the publication.
- B) ‘Payment Due’ – This phase is currently triggered for submissions using Publication Charges Processing when the Author is notified of a selected decision or when the Final Disposition is set to ‘Accept’ (depending on publication configuration). At this point, the Author must pay the Publication Charge using the external payment system for the submission to move forward. An ‘In Process’ icon (🟡) is displayed in EM for submissions where a ‘Payment Due’ event has been triggered but not yet completed.
- C) ‘Complete’ – After the Author has submitted payment, the external payment system communicates that the transaction has been completed (paid, waived, or otherwise resolved). A ‘Complete – Unsuccessful’ icon (🔴) displayed indicates that a payment was attempted, but ultimately was not resolved. A ‘Complete – Successful’ icon (🟢) is displayed when the payment has been resolved via waiver, author payment, funder payment, or by other means.

Editors are only able to re-trigger a ‘Payment Due’ event if there is a fatal error communicating with the external payment system.

New in EM/PM version 13.0 for publications using Publication Charges Processing, Editors and Publishers with ‘View Publication Charges’ permission will always have access to a ‘Resend Payment Request’ link on custom *Details* page layouts. Clicking this link initiates a new ‘Payment Due’ event, triggering all letters associated with the ‘Publication Charges Payment Requested’ event in *ActionManager*. This is helpful if “other” charges need to be collected or if new metadata needs to be included in the payment request.

NOTE: Each time a new ‘Payment Due’ event is triggered the Publication Charges record for the submission will be updated – there will not be multiple, separate open ‘Payment Due’ records for the submission.

Sample custom Details page layout with new 'Resend Payment Request' link

Details for Manuscript Number: SALLYDEV111-D-14-00001 "APC Optional 2.28.14"

[Cancel](#) [Save](#) [Save and Close](#)

[Abstract](#) [Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Reviewers Proposed by Editors](#) [Additional Information](#)

APC Status Description:	Complete - Successful <input checked="" type="checkbox"/> Resend Payment Request
Additional Manuscript Details:	Add/Edit Additional Manuscript Details
Corresponding Author:	Buzz Lightyear Aldrin, Massachusetts Institute of Technology   Cambridge, MA UNITED STATES [Proxy]
Corresponding Author E-Mail:	subnoske@ariessys.com

TO CONFIGURE:

If the 'Publication Charges Status' is already configured to display on the custom *Details* page layout, no additional configuration is necessary.

For reference only: Editor and Publisher roles must have 'View Publication Charges' permission to see the 'Publication Charges Status' on the *Details* page and throughout the system. The 'Resend Payment Request' link availability is also dependent on this permission.

If 'Publication Charges Status' is not currently configured on any custom *Details* page layouts, it may be added by editing an existing layout (or adding a new one) on the 'Define Details Page Layouts' page in *PolicyManager* and clicking the 'Select Items to Display' link. Select the 'Publication Charges Status' checkbox in the 'Key Workflow Dates and Status Information' section of the page. After returning to the layout, the order of the items on the layout can be rearranged. Additionally, the custom layout must be selected for the desired roles in Editor or Publisher *RoleManager*.

Trigger Payment Due in Production

In EM version 12.2, publications can use a Publication Charges feature integrated into Editorial Manager that will direct Authors to an external payment system. Editorial Manager handles this in three steps:

- A) The estimate – This phase is triggered by an Author clicking ‘Build PDF for my Approval’ during the submission process. The author is able to view the Publication Charge estimate from the external payment system. Once the estimate has been viewed, the Author may agree to the Publication Charges and proceed to submit to the publication.
- B) ‘Payment Due’ – This phase is currently triggered for submissions using Publication Charges Processing when the Author is notified of a selected decision or when the Final Disposition is set to ‘Accept’ (depending on publication configuration). At this point, the Author must pay the Publication Charge using the external payment system for the submission to move forward with the publication.
- C) ‘Complete’ – After the Author has submitted payment, the external payment system communicates that the transaction has been completed (paid, waived, or otherwise resolved).

New in PM version 13.0, publications using both Production Tracking and Publication Charges Processing can trigger the ‘Payment Due’ phase via a Submission Production Task, assigned either manually or automatically. ‘Payment Due’ events can be triggered multiple times throughout the workflow of the submission. Additionally, a ‘Resend Payment Request’ link will be available for Editors and Publishers with ‘View Publication Charges’ permission after the ‘Payment Due’ has been triggered once.

NOTE: Essentially, each time a ‘Payment Due’ event is triggered, either by manual or automatic task assignment or an Editor or Publisher resending the payment request, the Publication Charges record for the submission will be updated – there will not be multiple, separate open ‘Payment Due’ records for the submission.

The standard Publication Charges icons are added to the Production Tracking interface:

1. 🟡 “In process” – This icon means that a new payment request has been sent to the Author and payment has not yet been resolved. A ‘Resend Payment Request’ link is available for submissions with this Publication Charges Status, allowing publications to send updated metadata or to collect “other” charges, such as page or color charges.
2. 🔴 “Complete – Unsuccessful” – This icon indicates that a payment was attempted, but ultimately was not resolved. A ‘Resend Payment Request’ link is available for submissions with this Publication Charges status.
3. 🟢 “Complete – Successful” – The payment has been resolved via waiver, author payment, funder payment, or by other means. A ‘Resend Payment Request’ is










available for submissions with this Publication Charges status if there is a need to update payment information with additional charges or metadata.

If the 'Payment Due' event is re-triggered after a "Complete – Successful" or "Complete – Unsuccessful" payment status has been achieved, the Publication Charges status returns to "In Process."

Publication Charges information is currently available on custom *Details* page layouts, but new in 13.0, the 'Resend Payment Request' link is always present for Editors and Publishers who have permission to 'View Publication Charges Status' in Editor or Publisher *RoleManager*.

The Publication Charges status icons are added to Schedule Group Table of Contents next to the link to the Production Details action link for submissions in the group. The Table of Contents for a Schedule Group may be viewed by clicking the 'Edit Group Details' link from the 'Manage Schedule Groups' page (or the 'Add Submissions' interface).

Sample Table of Contents for a Schedule Group displaying Publication Charges Status icons

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page
Production Details   Transmittal Form   Remove from Group Linked Submissions	1	SALLYTEST60-D-08-00011	Original Study	Michael Editor	20		
<div style="border: 1px solid #ccc; padding: 2px;"> + Additional Manuscript Details </div>							
Production Details  Transmittal Form Remove from Group Linked Submissions	2	SALLYTEST80-D-10-00016	Original Study	Sandy Author	20		
<div style="border: 1px solid #ccc; padding: 2px;"> + Additional Manuscript Details </div>							
Production Details  Transmittal Form Remove from Group Linked Submissions	3	SALLYDEV92-D-12-00010	Original Study	Sally Editor, PhD	20		
<div style="border: 1px solid #ccc; padding: 2px;"> + Additional Manuscript Details </div>							
Production Details  Transmittal Form Remove from Group Linked Submissions	4	SALLYDEV100-D-12-00029	Original Study	Buzz Lightyear Aldrin, PhD	20		
<div style="border: 1px solid #ccc; padding: 2px;"> + Additional Manuscript Details </div>							
Production Details  Transmittal Form Remove from Group Linked Submissions	5	SALLYTEST80-D-10-00012	Original Study	Ann Author	20		
<div style="border: 1px solid #ccc; padding: 2px;"> + Additional Manuscript Details </div>							
Production Details  Transmittal Form Remove from Group Linked Submissions	6	SALLYDEV121-D-15-00011	APC Optional	Buzz Lightyear Aldrin, PhD	0		

TO CONFIGURE:

For publications that are using Production Tracking in addition to Publication Charges Processing, a new option is added to the 'Configure Publication Charges Processing' page in *PolicyManager*. In the 'Select an Editorial Event to Trigger the Publication Charges Due Event' section, Production Tracking users can now select "None (Publication Charges Due must be triggered by assigning a Submission Production Task)"

Sample Configure Publication Charges Processing page (partial display) – Production Tracking enabled

Configure Publication Charges Processing

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

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

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

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

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

Notify Author of selected decision(s): Please select Decision Term(s) ▲
Accept
Revise
Revise, No Review
▼

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

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

Prevent Submission if the Author does not view the Publication Charges

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

Prevent submission if the Payment System is unavailable

Customize Publication Charges Instructions for the Author

Area	Instructions
Optional 'Publication Charges' Page Instructions	Insert Special Character <div style="border: 1px solid gray; padding: 2px; min-height: 20px;">You may choose to submit this manuscript for Open Access</div>


After selecting the 'None' option on the 'Configure Publication Charges Processing' page, a Submission Production Task must be configured to trigger a payment request. In the 'ProduXion Manager' section of *PolicyManager*, navigate to the 'Configure Submission Workflows and Production Tasks' page.


A new 'Trigger Publication Charges' column displays in the submission workflow grid. A "checkmark" icon in this column signifies that assigning the respective task will trigger a payment request to the Author.


Sample Edit Submission Workflow page – the ‘Copy Edit’ Submission Production Task has been configured to be assigned automatically upon the submission’s production initiation and to trigger a payment request to the Author













Configure Submission Workflow

This is a user-defined workflow, containing a set of tasks selected from those defined under the 'All Submission Production Tasks' workflow.

You may select additional tasks and add them into this workflow; the remove icon () removes the associated task from this workflow alone. The Task Order defined here applies to this workflow alone.

The [Edit] link modifies the master Task Type configuration, affecting all workflows. The edit icon () modifies Automatic Task Assignment settings affecting only this workflow (you must first configure the Task Type to allow Automatic Task Assignment when Trigger Tasks are submitted).

Workflow Name: 


	Order	Task Type (*=Milestone) [Edit]	Assign if First Task 	Trigger Publication Charges 	Trigger Task(s) 	Allow Repeats 
	<input type="text" value="1"/>	Copy Edit [Edit]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	<input type="text" value="2"/>	Edit Graphics [Edit]			Copy Edit	<input checked="" type="checkbox"/>
	<input type="text" value="3"/>	Composition [Edit]			Composition	<input checked="" type="checkbox"/>
	<input type="text" value="4"/>	Author Proof [Edit]	<input checked="" type="checkbox"/>			
	<input type="text" value="5"/>	Final Files to Print [Edit]				
	<input type="text" value="6"/>	Final Files to Online Posting [Edit]				


[Edit Article Types](#)
[PolicyManager Main Menu](#)

Additional Edit Submission Workflow example – the “Trigger Publication Charges Due” task is configured to be automatically assigned upon the submission’s initiation into production, will trigger a payment request to the author upon assignment, and the task is configured as a Milestone Task (the system recognizes it as ‘completed’ immediately after assignment). Additionally, assigning the ‘Copy Edit’ and ‘Final Charge to Author’ tasks will trigger a new ‘Payment Due’ event upon assignment.





Configure Submission Workflow

This workflow contains the master list of all defined Submission Production Tasks, and is the default workflow initially associated with all Article Types.

Use 'Add New Task Type' here to add a new Submission Production Task Type to the system for use in all Workflows. Unused Task Types may also be removed from the system using the remove icon (). The Task Order defined here applies primarily to this workflow alone, but is also used by the Production Status Grid.

The [Edit] link modifies the master Task Type configuration, affecting all workflows. The edit icon () modifies Automatic Task Assignment settings affecting only this workflow (you must first configure the Task Type to allow Automatic Task Assignment when Trigger Tasks are submitted).

Workflow Name:

Order	Task Type (*=Milestone)	Assign if First Task 	Trigger Publication Charges 	Trigger Task(s) 	Allow Repeats 
1	•Trigger Publication Charges Due [Edit]	✓	✓ ←	..//	
2	•Deposit DOI at Crossref [Edit]				
3	Copy Edit [Edit]	(✓)	✓ ←		
4	Edit Graphics [Edit]			..// Copy Edit	✓
5	Composition [Edit]				
6	Author Proof [Edit]	(✓)		..// Composition	
7	Final Files to Print [Edit]				
8	Final Files to Online Posting [Edit]				
9	Final Charge to Author [Edit]		✓ ←		

Update Insert Special Character + Add New Task Type

Maximum Production Task Name is 100 characters

Hidden Submission Production Tasks

[Return to Configure Workflows and Tasks](#)

[Edit Article Types](#)
[PolicyManager Main Menu](#)

To configure a Submission Production Task to trigger a ‘Payment Due’ event, click the ‘Edit’ link in the workflow for an existing task or create a new Submission Production Task. New options for Publication Charges are added at the bottom of the ‘Assignment Options’ section of the page.

Sample Edit Submission Production Task page – this task is configured to be automatically assigned to the Corresponding Author upon the submission’s initiation into production and its assignment will trigger a ‘Payment Due’ event and all associated letters configured in Action Manager for the ‘Publication Charges Payment Requested’ event

Edit Submission Production Task

[Insert Special Character](#)
 New Production Task Name:
Maximum Production Task Name is 100 characters

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

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

Assign Automatically when Production is initiated (if this is the first task in the workflow)
 Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)

Automatic End Production when the Task is Completed and there are No Other Open Tasks in the Workflow.

End Production Automatically after this task is Completed

Batch Assignment can be triggered on either a set of submissions selected from the Search Submissions Results Production view, or all Submissions in a Schedule Group selected from the Manage Schedule Groups folder. Only tasks that are specifically configured to allow batch assignment can be used in these cases. Tasks that are configured for Assignment to 'Corresponding Author Only' cannot also be configured to Allow Batch Assignment.

Allow Batch Assignment

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

Trigger 'Publication Charges Payment Due'
 Letter Options:

- Trigger all ActionManager 'Publication Charges Payment Requested' letters
- Send following letter to the Corresponding Author only |
- Do not trigger if APC Status is already 'In Process' or 'Complete'
- Do not trigger on repeated assignment of this Task

Typing text into the Custom Instructions will display an "Instructions" link when the recipient views their task assignments. Leave this field empty to suppress this link.

Production Task Custom Instructions: [Insert Special Character](#)

Only roles with the "Assign Production Task" permission appear in this list. You may select multiple roles or de-select a role by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). If the task is configured for Automatic Assignment, you must select a single person who will be the sender for all tasks assigned automatically.

Can be Assigned by:

Managing Editor
Copyeditor
Production Manager
Publisher

Ed J Editor, Managing Editor
Sally Editor, Managing Editor
Caroline Webber, Managing Editor

Can be Assigned to:
 Corresponding Author only
 Selected Editor/Publisher Roles only

Rest of page not displayed

To allow the task to trigger a 'Payment Due' event upon assignment, select the 'Trigger Publication Charges Payment Due' checkbox. In the 'Letter Options' section directly below, the "Trigger all ActionManager 'Publication Charges Payment Requested' letters" is selected by default. If the publication wishes to send a letter to only the Corresponding Author, the 'Send Following letter to Corresponding Author only' should be selected along with the desired letter from the drop down list.

Selecting the "Do not trigger APC Status if already 'In Process' or 'Complete'" checkbox will prevent the task assignment from sending a payment request to the Author. The task will still be assigned as usual (for example, any letters configured on this page for Batch or Non-Batch Assignment will still be sent), but a new payment request event will not be initiated.

Selecting the 'Do not trigger on repeated assignment of this Task' checkbox will prevent a new payment request from being sent to the author if this task is assigned a second time. If there are any previous, non-cancelled instances of this Task Type for the assignment (i.e. the task is open or has been completed/submitted), a 'Payment Due' event is not triggered.

All other task assignment functionality (Batch Task Assignment, Submission Task Assignment in a Schedule Group, etc.) is unchanged.

Send Additional Metadata to Payment System via Custom Metadata ID

In EM/PM, the 'Custom Metadata ID' associated with Custom Submission Questions and Additional Manuscript Details can be used to transmit submission metadata in editorial transmittals, transfers to other publications, or in production task exports. Currently, Publications using the Publication Charges Processing feature integrated with Editorial Manager can send Funding Information associated with the submission to the external payment system when an Author views the Publication Charges Estimate or the publication sends a payment request.

New in EM/PM version 13.0 for publications using Publication Charges Processing, the Custom Metadata ID can be used to transmit information about a submission to the external payment system when an 'Estimate' or 'Payment Due' event is triggered. Additional Manuscript Details configured with a Custom Metadata ID will be sent to the external payment system as well as any Custom Submission Question configured to be included in Publication Charges Metadata with a corresponding Custom Metadata ID. This may be helpful if the publication offers discounts under certain circumstances; a Custom Submission Question may be configured to collect information about an available discount and then sent to the payment system for consideration.

NOTE: The Publisher is responsible for instructing individual publications regarding the Custom Metadata ID that is to be used to identify a specific Custom Question or AMD. If individual publications within the Publisher's enterprise use different values for the Custom Metadata ID to identify a Custom Question or Additional Manuscript Detail that is intended to be used by the payment system's pricing engine, the Publisher must communicate this to the payment system – there is no programmatic mapping of different Custom Metadata ID's for different publications within Publication Charges Processing in Editorial Manager.

When a Custom Question is configured to be included in Publication Charges Metadata, the following information is sent to the payment system at the 'Estimate' and 'Payment Due' phases:

1. Custom Metadata ID
2. "Parent" Question Custom Metadata ID (used for follow-on questions if configured)
3. Custom Question Text
4. Custom Question Response
5. First Name
6. Last Name
7. ORCID iD (if available)

If the question was also presented to Co-Authors, their names and responses are sent to the payment system.

When an Additional Manuscript Detail (AMD) is configured to be included in the Publication Charges Metadata and has a Custom Metadata ID, the following information is sent to the payment system at the 'Estimate' and 'Payment Due' phases:

1. Custom Metadata ID
2. Additional Manuscript Detail Description
3. Additional Manuscript Detail Value

Since AMDs are not associated with an Author of the submission and are not versioned, all Additional Manuscript Details with a Custom Metadata IDs configured to be included in the Publication Charges Metadata will be sent to the payment system.

TO CONFIGURE:

Custom Questions

The Custom Metadata ID and Publication Charges Metadata inclusion is configured on the 'Add/Edit Custom Question' page, accessed by clicking the 'Create Custom Questions' link in *PolicyManager* and adding or editing an existing question.

To include the individual Custom Submission Question as part of the metadata package sent to the payment system, select the 'Include in Publication Charges Metadata' checkbox in the 'Integration Options' section at the bottom of the page. After selecting the checkbox, enter a Custom Metadata ID (if there currently isn't one associated).

To include a follow-on question in the metadata sent to the payment system, the "parent" or initial question must be configured to be included in the Publication Charges Metadata and have a valid Custom Metadata ID. Additionally, the follow-on (or "child") question must have its own Custom Metadata ID. If a follow-on question to a follow-on question (or "grandchild") needs to be included in the Publication Charges Metadata, both the "child" and "parent" questions must have Custom Metadata IDs configured and the "parent" question must be configured to be included in the Publication Charges Metadata.

Sample Edit Custom Question page- the initial question and its follow-on question are configured to be sent to the payment system

Edit Custom Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented as part of submission, author verification or production task completion.

Initial Question

Question text:
Did you attend the recent conference in Las Vegas?

Instructions for Author Response:

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: **List Type:** Drop-down list (Allows for a null or single value selection)

When configuring the default value, please note that only the value "Please select a response" will force the author to select another answer. Any other value will count as a valid response.

Display Order	Default Value	Value	Description
1	<input type="radio"/>	Please select a response	
2	<input type="radio"/>	Yes	Edit
3	<input type="radio"/>	No	Remove Edit
4	<input type="radio"/>	<input type="text"/>	Save Item

If user selects:

Follow-up Question 1 [\[remove\]](#)

If user selected "Yes" in response to "Did you attend the recent conference in Las Vegas?"

Question text:
Would you like your submission to be considered for the Conference Attendance Discount?

Instructions for Author Response:

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: **List Type:** Drop-down list (Allows for a null or single value selection)

When configuring the default value, please note that only the value "Please select a response" will force the author to select another answer. Any other value will count as a valid response.

Display Order	Default Value	Value	Description
1	<input type="radio"/>	Please select a response	
2	<input type="radio"/>	Yes	Remove Edit
3	<input type="radio"/>	No	Remove Edit
4	<input type="radio"/>	<input type="text"/>	Save Item

Custom Metadata ID:

If user selects:

Integration Options

Include in Editorial Transmittal
 Include in Production Task Transmittal
 Transmit as Author Note/Footnote
 Include in Publication Charges Metadata (Please enter a Custom Metadata ID below)

Custom Metadata ID:

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

PDF Cover Page

Display

Manuscript Details

Display

Help Text:

Transmittal Form

Display

Editable

Required

Help Text:

As in existing functionality, the Custom Question configured to be included in Publication Charges Metadata needs to be associated with a Questionnaire ('Create Questionnaires' in *PolicyManager*). Once associated with a Questionnaire, the Questionnaire must be linked to an Article Type configured for Publication Charges Processing. To present the Questionnaire to the Corresponding Author only, select the desired questionnaire in the drop down list for the 'Designate Submission Questionnaire' line item under "Set 'Additional Information' Preferences" of the Edit Article Type page. To present the Questionnaire to the Co-Authors when registering and verifying association with the submission, select the desired questionnaire in the drop down list for the 'Designate Author Questionnaire' line item.

Additional Manuscript Details

To configure an Additional Manuscript Detail to be included in Publication Charges Metadata sent to the payment system, go to the 'Add/Edit Additional Manuscript Details' page under the 'Additional Data Policies' section in *PolicyManager*.

Select the 'Include in Publication Charges Metadata' checkbox. In the 'Options' section of the page, enter a valid Custom Metadata ID in the Transmittal Form row of the grid.

Sample Add/Edit Additional Manuscript Detail page – the AMD is configured to be included in the Publication Charges Metadata and has a valid Custom Metadata ID

Edit Additional Manuscript Detail Field

Cancel Submit

Field Description: [Insert Special Character](#)
 Cover Feature Cost Confirmation (AMD)
 Maximum 256 characters

Include in Publication Charges Metadata (Please enter a Custom Metadata ID below)

Field Type: List [View/Edit Values for Drop-down List](#)

Display Field for All Article Types
 Display Field for Selected Article Types

Original Study
 APC Optional (this is a really long Article Type Name for testing purposes)
 APC Required
 13.0-02 Optional APC

Select All On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, hold down the 'Command' key while using the mouse to select the desired items.

Clear All

Options
 Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text. Fields displayed for a submission or proposal may also be displayed for invited Authors whose invitations are generated from them. Select the 'Hide' checkbox for the 'Display for Invited Submissions' setting to suppress the field for invited Authors.

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Custom Metadata ID: <input type="text" value="Cover_Cost"/> Help			
Display for Invited Submissions	<input checked="" type="checkbox"/>	N/A	N/A	
Search Submission	<input type="checkbox"/>	N/A	N/A	N/A
Search Proposal	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Schedule Group TOC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

Cancel Submit

Publication Charges Processing for ‘Editor Use Only’

Article Types

In EM version 12.2, Publication Charges are set to “Hidden” for Article Types configured as ‘Editor Use Only.’ Submissions with these Article Types are submitted by Editors with ‘Submit Manuscript as an Editor’ permission in *RoleManager*. This eliminates the need for Editors to login as an Author Role to submit. Editors with the additional permission “Can set ‘Accept on Submission’ Final Disposition on ‘Editor/Publisher Use Only’ Types” can set Final Disposition to ‘Accept’ on these submissions without putting the submission through the peer review process.

New in EM version 13.0 for publications using Publication Charges Processing, ‘Editor Use Only’ Article Types can be configured to have Publication Charges applied. The ‘Apply Publication Charges’ setting on the ‘Edit Article Type’ page may be set to ‘Optional,’ ‘Required,’ or ‘Hidden.’ All other Publication Charges Processing will function as normally for the submission.

TO CONFIGURE:

Add or edit an existing Article Type on the ‘Edit Article Types’ page in *PolicyManager*. For Article Types with the ‘Editor Use Only’ checkbox selected, a new ‘Apply Publication Charges’ drop down list is available. Publications may make Publication Charges ‘Optional,’ ‘Required,’ or ‘Hidden’ for ‘Editor Use Only’ Article Types.

Sample Edit Article Type page (partial)

Edit Article Type

Article Type:

Maximum Article Type name is 75 characters.
 Warning: changing the Article Type name will apply the name change to all submissions of this type, including previously submitted manuscripts/submissions.

Family: Regular **Editor Use Only:**

Hide When you **Hide** an Article Type, the Article Type will be deactivated (not available for new manuscripts).
 Allow file uploads from arXiv.org server

Similarity Check:
 Send Reviewer PDF on Initial Submission
 Send Reviewer PDF on First Revision

You must also set up Automatic Transfer to a checking service on the [Configure Similarity Check](#) page. Editor and Publisher Roles can be

Rest of page unchanged

Article Type Parameters	New Submission	Revised Submission
Set Secondary "Full Title" Preferences:	Optional ▼	Optional ▼
Set "Short Title" Preferences:	Optional ▼	Optional ▼
Set Secondary "Short Title" Preferences:	Optional ▼	Optional ▼
Set "Funding Information" Preferences:	Hidden ▼	Hidden ▼
Set "Select Section/Category" Preferences:	Optional ▼	Optional ▼
Set "Submit Abstract" Preferences:	Optional ▼	Optional ▼
Set Secondary "Submit Abstract" Preferences:	Optional ▼	Optional ▼
Set "Enter Keywords" Preferences:	Optional ▼	Optional ▼
Set "Enter Secondary Keywords" Preferences:	Optional ▼	Optional ▼
Set "Select Classifications" Preferences:	Optional ▼	Optional ▼
Set "Additional Information" Preferences:		
Designate Submission Questionnaire:	Hidden ▼	Hidden ▼
Designate Author Questionnaire:	Hidden ▼	Hidden ▼
Set "Enter Comments" Preferences:	Optional ▼	Optional ▼
Set "Suggest Reviewers" Preferences:	Display ▼	Display ▼
Set "Oppose Reviewers" Preferences:	Display ▼	Display ▼
Set "Respond to Reviewers" Preferences:	Hidden	Optional ▼
Set "Request Editor" Preferences:	Optional ▼	Optional ▼
Set "Select Region of Origin" Preferences:	Optional ▼	Optional ▼

You may set Minimum and/or Maximum limits for the 'Number of Classifications' under [Field Size Limitations](#) below.

Fees and Charges
 Charge Submission Fee

Apply Publication Charges

You must also configure workflow triggers on the 'Configure Publication Charges Processing' page. Changes to the Article Type configuration for the 'Apply Publication Charges' setting affect papers going forward only. Submissions in process are held to the Publication Charges setting that was in place for the selected Article Type when the Author clicked the Approve Submission link. If an Author or Editor edits the submission, the current configuration for the 'Apply Publishing Charges' setting is used.

PROPOSAL ENHANCEMENTS

Add Proposals to Schedule Groups

EM/PM version 12.2 supports the creation of “Issues” (a set of articles) through the use of the Proposals interface as well as Schedule Groups (for publications using Production Tracking). Using these features, Editors are able to collect submissions for an Issue of a publication and copy all Target Publication details to the submissions within the issue. Currently, Proposals cannot be associated with a Schedule Group.

New in EM/PM version 13.0, the Proposal and Schedule Group features are enhanced to allow Editors to associate a Proposal with a Schedule Group, adding an additional level to collecting and managing invited submissions:

- **Schedule Group:** This is the “shell” of the collection of material within. Proposals and their invited content can be managed within the ‘Manage Schedule Groups’ interface in Production Tracking.
- **Proposal:** A collection of submissions wherein the contents are materials submitted by Authors selected by an Editor.
- **Invited Submission:** The content of a Proposal.

Proposals can be associated with a Schedule Group at the same time the Proposal is initiated. When a Proposal is associated with a Schedule Group, the Schedule Group’s values for ‘Target Publication Date’ and ‘Target Publication Volume’ are applied to the Proposal, which is shown as a header in the Schedule Group Table of Contents. Invited Submissions within the Proposal also inherit the Schedule Group’s values for ‘Target Publication Date’ and ‘Target Publication Volume.’ Once submitted, these invited submissions display in a new ‘Pre-selected Submissions grid associated with the Schedule Group. When production is initiated for these submissions, they will be moved into the Table of Contents for that Schedule Group.

Sample Initiate Proposal page – Schedule Group Assignment is Required and there are existing related Schedule Groups available

The screenshot shows a web form titled "Initiate Proposal". At the top, there is a grey informational box stating: "Selecting a Schedule Group is required. Once a Schedule Group has been selected, information from that Schedule Group will be displayed automatically, and Proposal creation can continue. A Schedule Group can be added to the list by clicking the 'Add Schedule Group' link." Below this, the form has two rows of input fields. The first row is for "Article Type" with a dropdown menu set to "Special Issue". The second row is for "Schedule Group" with a dropdown menu set to "Please Choose a Schedule Group" and a blue link "Add Schedule Group" to its right. This second row is highlighted with a green border. At the bottom of the form are two buttons: "Cancel" and "Proceed".

Proposal Article Types can be configured on the ‘Edit Article Type’ page to allow association with a Schedule Group. Publications that have this option set to ‘Required’ will not be able to proceed from the page without assigning the Proposal to a Schedule Group. This setting may also be configured as ‘Optional’ or ‘Hidden.’ In the event that

Schedule Groups have not yet been configured for the publication, the 'Add Schedule Group' link is available on the 'Initiate Proposal' page.

NOTE: The Author Invitation experience, the Author Invited Submission Process, and the rest of the Proposal creation and assignment processes are unchanged by this enhancement.

Once an invited Author submits the paper to the publication, the submission will show in the Schedule Group's 'Pre-selected Submissions' grid on the 'Edit Group Details' page for the Schedule Group.

Sample Pre-selected Submissions grid displayed at the bottom of the Edit Group Details page – the grey header at the top of the grid indicates the Proposal associated with the submissions.

Pre-selected Submissions																									
Actions	Target ICS Position	Manuscript Number	Article Type	Article Title	Editor Organizing Proposal	Author Name	Target Number of Pages	Editorial Status	DOI	Previous Edition Chapter	Previous Edition pp	Char Count text	Text (w/ pp)	Est. References pp	Est. Tables pp	Est. Table Count	Black and White Image Count	Doppler and White Count	Color Image Count	Doppler Color Count	FIGS: # of Parts	Est. Pgs. pp (est)	Printed pp (est)	Submission Target Date	Submission Actual Date
	1	Kristin132	Book	Proposed Book Unit 1	Mary Shelby Koman		0	Author Invited									0	0	0						
Details V Transmittal Form				Chapter 2: Building on the Previous		Jarvis Cocker	0	Submitted to Journal									0	0							
View Reviews and Comments				Chapter 5: Winning Friends		Kristin 7.0	0	Submitted to Journal									0	0							
Details V Transmittal Form				Chapter 6: Feel Free to Change this Title		Baloo Bear	0	Submitted to Journal									0	0							
View Reviews and Comments				Chapter 8: In Summation		Virginia Ayotte	0	Submitted to Journal									0	0							
Details V Transmittal Form																									
View Reviews and Comments																									

The submissions in the 'Pre-selected Submissions' grid are solicited submissions that have been submitted to the publication and are associated with a Proposal that was assigned to the Schedule Group but are not currently in production. Therefore, they are not "officially" part of the Schedule Group. Submission Production Tasks, Schedule Group Production Tasks, and Batch Production Tasks may not be assigned to any of these submissions. Additionally, these submissions may not be added to any other Schedule Groups since they are not in production yet.

Once production has been initiated on a pre-selected submission, it moves to the Table of Contents grid directly above. The Table of Contents grid automatically uses Proposals associated with the Schedule Group as "headers." When an invited submission within a Proposal enters production, the submission moves to a position in the Table of Contents underneath its Proposal Header and the Table of Contents automatically rennumbers to accommodate the new addition.

NOTE: When a Schedule Group's contents are copied, any submissions in the 'Pre-selected Submissions' grid are not carried over to the copy. Only submissions in production (part of the Table of Contents) will be carried over to the copied group.

NOTE: Publications may also add additional headers via the 'Insert Header' button at the bottom of the Table of Contents grid. This is existing functionality.

Sample Edit Group Details (partial) layout – a submission in the Proposed Book Unit 1 proposal is in production and is listed in the Table of Contents underneath its Proposal header

Edit Schedule Group Details/Add Submissions

[Submit](#) [Cancel](#) [Add Submissions](#)

Schedule Group Description: Maximum Schedule Group Description is 100 characters

Title: Maximum 2000 characters

Schedule Group Notes:
 (No notes yet.)

Schedule Group metadata not pictured

[Download Table of Contents](#) [Download Table of Contents in UTF-8 Format](#)

Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Editor Originating Proposal	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	Previous Edition DOI	Previous Edition Chapter	Char Count	Text (ms)	Est. Text (pp)	References (#)	Est. Ref. pp	Tables (#)	Est. Table pp	Black and White Image Count	Duppler Black and White Image Count	Color Image Count	Duppler Color Count	FIGS: # of Parts	Est. Fig. pp (est)	Printed	Submission Target Date	Submission Actual Date
Details Remove Header	1	Kristin132	Book	Proposed Mary Shelby Book Unit 1	Mary Shelby Roman		0													0	0	0						
Production Details Transmittal Form Remove from Group Linked Submissions	2		Chapter	Chapter 3: Middle of the Road	Jordan B. Celano, Ph.D.		0	0	0											0	0							
Details Remove Header Update TOC (head header)	3	Kristin133	Book	Boom.	Mary Shelby Roman		0													0	0	0						

Pre-selected Submissions

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Editor Originating Proposal	Author Name	Target Number of Pages	Editorial Status	DOI	Previous Edition Chapter	Previous Edition pp	Char Count	Text (ms)	Est. Text (pp)	References (#)	Est. Ref. pp	Tables (#)	Est. Table pp	Black and White Image Count	Duppler Black and White Image Count	Color Image Count	Duppler Color Count	FIGS: # of Parts	Est. Fig. pp (est)	Printed	Submission Target Date	Submission Actual Date
	1	Kristin132	Book	Proposed Mary Shelby Book Unit 1	Mary Shelby Roman		0	Author Invited												0	0	0					
Details Transmittal Form View Reviews and Comments			Chapter	Chapter 2: Building on the Previous	Jarvis Cocker		0	Submitted to Journal											0	0							
Details Transmittal Form View Reviews and Comments			Chapter	Chapter 3: Winning Friends	Kristin		0	Submitted to Journal											0	0							
Details Transmittal Form View Reviews and Comments			Chapter	Chapter 6: Feel Free to Change this Title	Baloo Bear		0	Submitted to Journal											0	0							
Details Transmittal Form View Reviews and Comments			Chapter	Chapter 8: In Summation	Virginia Ayotte		0	Submitted to Journal											0	0							

[Submit](#) [Cancel](#) [Add Submissions](#)

NOTE: Production is initiated on an invited submission outside of the Pre-selected Submissions Grid using existing functionality. However, if the submission is in the Pre-selected Submissions grid for a Schedule Group and the user initiating production does not change the Schedule Group for that submission or does not have the permission to assign the submission to a Schedule Group, then the submission is automatically assigned to that Schedule Group when production is initiated. Once the invited submission is in production and part of the Schedule Group’s Table of Contents, it is eligible for Submission Production Task, Schedule Group Tasks, and Batch Assignments. If the publication is configured to allow assignment of a single submission to multiple Schedule Groups, the invited submission may be added to other Schedule Groups, but as with current functionality, one of the Schedule Groups has to be designated the Controlling Group.

NOTE: Book-related invited submissions cannot be added to regular (“Issue”) Schedule Groups.

NOTE: If ‘Remove from Group’ is clicked for a Proposal header in the Table of Contents grid, the proposal header will be removed from the TOC, but its associated submissions will not be automatically removed from the TOC or the Pre-selected Submissions grid from the group. Since Proposals can only be associated with a Schedule Group when the

proposal is initiated, the removed proposal cannot be re-added or associated with any other Schedule Groups in the future, however, submissions associated with the Proposal can be assigned to this Schedule Group or another Schedule Group. If submissions related to the removed proposal are in Production and part of the Schedule Group Table of Contents, and the publication wants to remove them from the Schedule Group, they can be removed individually via the 'Remove from Group' link for the submission.

NOTE: Regular submissions (unsolicited content) that have been submitted to the publication may be added to a Schedule Group that contains Proposals. Publications may use existing functionality to add submissions to a Schedule Group.

If there are any submissions in the 'Pre-selected Submissions' grid for the Schedule Group, clicking the 'Close Group' link (and proceeding from the warning message) will remove the pre-selected submissions from the Schedule Group. Clicking the Close Group link warns the user that there are submissions in the Pre-selected Submissions grid that are not yet officially associated with the Schedule Group. The user can elect to proceed, which will remove the submissions from the Pre-selected Submissions grid, or can elect to leave the Schedule Group open.

TO CONFIGURE:

Publications must be using Production Tracking to be able to add Proposals to a Schedule Group. To enable Production Tracking, please contact your Aries Account Coordinator.

Edit Article Type

A new option is added to the top of the 'Edit Article Type' page for 'Proposal' Family Article Types in *PolicyManager* that controls whether the Proposal can be added to a Schedule Group: 'Assign to Schedule Group'.

Sample Edit Article Type page in PolicyManager (partial)

By default, the 'Assign to Schedule Group' is 'Hidden,' but this setting must be changed to 'Optional' or 'Required' to allow the proposal to be associated with a Schedule Group.

As in existing functionality, all new Article Types default to hidden, so the 'Hide' checkbox must be de-selected.

RoleManager

Editors need to have the following RoleManager permissions turned on in order to create and manage a Proposal:

- 'Initiate Proposals'
- 'Invite Authors/Solicit Commentaries'
- 'Override Author Invited Submission Due Dates'

Also useful are:

- 'Search All Proposals'
- 'View All Proposals and Submissions with Commentaries'
- 'Send Author Reminders'
- 'Set Final Disposition on Proposals'
- 'Receive Assignments in 'New Assignments' Folder' (for 'Assign Proposal to Myself' option)

Both Editors and Publishers may manage Schedule Groups. To allow this, select the 'Manage Schedule Groups' permission in Editor or Publisher *RoleManager*.

Predefine Invited Article Title

In EM version 12.2, Editors can specify the Article Type that an Author must use to submit an invited submission. This preselection occurs when the Editor initiates a proposal or solicits a commentary. If the publication wants an Author to use a specific title for their invited submission, the 'Invitation Notes' field is typically used to convey this information. However, this requires that the invited Author copy & paste the title from the Invitation Notes. Creating this extra step for the Author may result in typos, errors, or misunderstandings.

New in EM version 13.0, Editors can predefine Article Titles for invited submissions on the 'Select Author – Confirm Selection and Customize Letters' page. The predefined submission titles can be "locked" so the titles appear as "read-only" to the Author when they start to submit the invited paper.

Sample Enter Title page for an Author starting to submit an invited submission – the title has been predefined and cannot be edited by the Author

The screenshot displays the 'Enter Title' page in Editorial Manager. On the left, a sidebar titled 'Submission' contains several navigation options: 'Enter Title' (highlighted with a blue arrow), 'Add/Edit/Remove Authors', 'Submit Abstract', 'Enter Keywords', 'Select Classifications', 'Additional Information', 'Enter Comments', and 'Attach Files'. The main content area features a header 'Please Enter The Full Title of Your Submission' and a blue link 'Insert Special Character'. Below this, a red error message states 'Entering a Full Title is Required for Submission.' followed by the instruction 'Enter the title of your submission. You cannot enter a submission without a title.' The title input field contains the text 'Chapter 7: Almost Finished', which is enclosed in a green rectangular box, signifying it is a predefined, read-only title. A 'Next' button is located at the bottom right of the main content area.

Sample Enter Title page for an Author starting to submit an invited submission – the title has been predefined and unlocked

The screenshot displays a web interface for entering a submission title. On the left, a sidebar titled 'Submission' contains several menu items: 'Enter Title' (highlighted with a blue arrow), 'Add/Edit/Remove Authors', 'Submit Abstract', 'Enter Keywords', 'Select Classifications', 'Additional Information', 'Enter Comments', and 'Attach Files'. The main content area is titled 'Please Enter The Full Title of Your Submission' and includes a red error message: 'Entering a Full Title is Required for Submission. Enter the title of your submission. You cannot enter a submission without a title.' Below this is a text input field labeled 'Full Title' containing the text 'Chapter 10: The Golden Ratio' and a message: 'This predefined Article Title has been unlocked by the Editor before sending the invitation.' A 'Next' button is located at the bottom of the form area. A link for 'Insert Special Character' is visible in the top right corner.

Predefining and locking Titles can be configured by parent submission Article Type. After enabling the option to predefine the submission title for an Invited Article Type the following values can be entered on the ‘Select Author – Confirm Selection and Customize Letters’ page (depending on the Invited Article Type’s ‘Parameters’ preferences):

- Full Title
- Secondary Full Title
- Short Title
- Secondary Short Title

NOTE: When no Article Type is specified for the invited submissions, only Full Title is available.

Once an Article Type has been configured to use predefined Article Titles and the System Administrator can select whether the predefined titles are initially “unlocked” (editable) or “locked” (read-only) for Authors submitting an invited submission with that Article Type. This setting will be used each time and Editor invites Authors to submit content.

An Editor with the new ‘Lock/Unlock predefined Article Title’ permission in *RoleManager* may change the “locked” or “unlocked” setting for each invitation on the ‘Select Author – Confirm Selections and Customize Letters’ page.

Sample Select Authors – Confirm Selection and Customize Letters – Article Type has been configured to lock predefined Article Titles and Editor has ‘Lock/Unlock predefined Article Type’ permission.

Select Authors - Confirm Selection and Customize Letters

You have selected the following people as potential Authors. [\(more...\)](#)

Target Publication Information: Date: Mar 10 2020 12:00:00:000AM Volume: 1 Issue: Unspecified

Authors to Invite [Open Special Character Palette](#)

Name	Letter / Invitation Notes To Author	Article Title	Invited Author Response Due Date	Author Submission Due Date	Do Not Invite
Pop Art	Author Invitation for Proposal Customize <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>	Full Title: Chapter 10: The Golden Ratio <input checked="" type="checkbox"/> Lock title(s) for Author	05/17/2016 <small>(mm/dd/yyyy)</small>	12/23/2019 <small>(mm/dd/yyyy)</small>	<input type="checkbox"/>
Holly Bang	Author Invitation for Proposal Customize <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>	Full Title: Chap <input type="text"/> <input checked="" type="checkbox"/> Lock title(s) for Author	05/17/2016 <small>(mm/dd/yyyy)</small>	12/23/2019 <small>(mm/dd/yyyy)</small>	<input type="checkbox"/>

Others Notified of Author Invitation

Name	Letter	Do Not Send
Mary Shelby Roman (MANAGING EDITOR)	Ad Hoc 3 Test Customize	<input type="checkbox"/>
Mary Shelby Roman (MANAGING EDITOR)	Ad Hoc 3 Test Customize	<input type="checkbox"/>

Cancel
Submit

Sample Select Authors – Confirm Selection and Customize Letters – Article Type has been configured to lock predefined submission titles and Editor does not have ‘Lock/Unlock predefined Article Title’ permission.

Select Authors - Confirm Selection and Customize Letters

You have selected the following people as potential Authors. [\(more...\)](#)

Target Publication Information: Date: Mar 10 2020 12:00:00:000AM Volume: 1 Issue: Unspecified

Authors to Invite [Open Special Character Palette](#)

Name	Letter / Invitation Notes To Author	Article Title	Invited Author Response Due Date	Author Submission Due Date	Do Not Invite
Kristin 7.0	Author Questionnaire Author Invitation HTML Customize <input type="text"/>	<div style="border: 2px solid green; padding: 2px;"> Full Title: Chapter 20: Conclusions </div>	05/19/2016 <small>(mm/dd/yyyy)</small>	12/23/2019 <small>(mm/dd/yyyy)</small>	<input type="checkbox"/>

Others Notified of Author Invitation

Name	Letter	Do Not Send
Mary Shelby Roman (MANAGING EDITOR)	Ad Hoc 3 Test Customize	<input type="checkbox"/>

TO CONFIGURE:

To configure an Article Type to allow the entry of predefined submission Titles by Editors prior to sending Author Invitations, go to ‘Edit Article Types’ in the Submission Policies section of *PolicyManager*. From the ‘Edit Article Types’ page, add or edit an existing Article Type. In the ‘Author Invitation Parameters’ section, select the checkbox next to the option “Allow Editor to predefine submission title values”.

Sample (partial) Edit Article Type page displaying new 'predefine submission title' option

Author Invitation Parameters:	Invited Submissions	
Target Publication Date:	<input type="text" value="Optional"/>	<i>These settings affect any invitations generated from a submission with this article type; i.e from a Proposal or Solicited Commentary.</i>
Number of Days Author has to Respond to Invitation:	<input type="text" value="1"/>	Select "Required" if you wish to enforce the entry of a Target Publication Date for Invited Commentaries or Proposals.
Author Submission Due: (Select a Due Date Calculation Method):	<input type="text" value="30"/>	A value of zero indicates the Response due date is not calculated by the system, but may be entered manually by Editors with proper permissions.
<input type="radio"/> Number of days prior to Submission Target Publication Date:		
<input checked="" type="radio"/> Number of days after Author has accepted invitation:		
Automatically Un-Invite Authors:	<input checked="" type="checkbox"/>	If this box is selected, invited Authors will automatically be un-invited by the system if they do not respond to the invitation within the specified number of days.
Automatically Promote Alternate Authors:	<input checked="" type="checkbox"/>	If this box is selected, Alternate invited Authors will automatically be promoted to invited Authors by the system when the primary invited Authors(s) are un-invited or decline the invitation
Allow Editor to predefine submission title values:	<input checked="" type="checkbox"/>	Select this box to allow Editors to predefine values for any enabled title field when sending Author invitations.
<input type="radio"/> Provided titles are initially unlocked (Author can change)		Select 'Provided titles are initially unlocked (Author can change)' to initially allow Authors to customize titles suggested by an Editor when inviting an Author or 'Provided titles are initially locked (Author cannot change)' to initially prevent Author customization of titles suggested by an Editor when inviting an Author.
<input type="radio"/> Provided titles are initially locked (Author cannot change)		
Editor Parameters	New and Revised Submissions	
Editor Assignment Chain Template:	<input type="text" value="None"/>	Select an Assignment Chain Template to allow the entire Editor Chain to be assigned in one action, not just the first

After enabling the 'Allow Editor to predefine submission title values' option, one of the sub-options must be selected:

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

The Article Type's configuration of providing locked or unlocked values for the submission titles can be overridden on the Select Authors – Confirm Selection and Customize Letters' page by an Editor with the new *RoleManager* permission: 'Lock/Unlock predefined Article Title'.

Sample Editor RoleManager page with new Lock/Unlock predefined Article Title permission shown

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**
- Editor Assignment**
- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**
 - Use Proposals Details Layout
 - Search All Proposals
 - Initiate Proposals
 - Invite Authors/Solicit Commentaries
 - Select Alternate Authors
 - Promote Alternate Authors
 - Remove Alternate Authors
 - Lock/Unlock predefined Article Title
 - Override Author Invited Submission Due Dates
 - View All Proposals and Submissions with Commentaries
 - Set Final Disposition on Proposals
- General Searching and Viewing**
- Edit Submission**
- Discussion Forums**
- Transmittal Form**
- Sending E-mail**
- Viewing and Editing People Data**
- Flag Icons**
- Proxy Activities**
- Administrative and Reporting Functions**
- Cross-Publication Login**
- Produxion Manager**

REPORTING ENHANCEMENTS

Automated Reminders for Invited Authors

In EM version 12.2, publications can manually send reminders to Authors invited to submit to a proposal or commentary by using the 'Author Invited – No Response' or 'Author Invitation Status Report' links on the 'Reports' or 'Send Reminder Letters' pages.

New in EM version 13.0, Editors can configure reminders to be automatically sent to invited Authors with the 'Automated Author Invitation Reminder Report.' This functionality is already available for some Editorial reports (Author Revision Reminders, Author Transfers, Reviewer Reminders). A new permission is added to Editor *RoleManager* that allows the users with the role to configure automated reminders to invited Authors: 'Create Automated Author Invitation Reminders.'

NOTE: Permission to create automated reports cannot be removed from the Role once a user with that Role has created an active Automated Author Invitation Reminder report. The automated report must be removed before permission can be disabled.

Once permission has been enabled, the Automated Author Invitation Reminder Report will be available as a link in the 'Reports' section of the Proposal menu, 'Reports' interface accessed from the Editor main page, and accessible from the 'Send Reminder Letters' page.

Sample Reports page accessed by clicking the 'Reports' link on the Editor Main Menu

Reports

Report Tools

- [Enterprise Analytics Reporting](#)
- Parts of page omitted**
- [Editor's To-Do List Report](#)
- [Current Role Designations Report](#)

Author Reminder Reports

- [Co-Author Reminder Report](#)
- [Author Revision Status Report](#)
- [Author Revision Reminder Report](#)
- [Automated Author Revision Reminder Report](#)
- [Automated Author Transfer Reminder Report](#)

Invited Author Reports

- [Proposal Pipeline Report](#)
- [Authors Invited - No Response](#)
- [Author Invitation Status Report](#)
- [Automated Author Invitation Reminder Report](#)

Editor Reports

- [Assignment Status Report](#)
- [New Assignments Report](#)
- [Required Reviews Complete Report](#)

Sample Send Reminder Letters page accessed by clicking the 'Send Reminder Letters' link in the Reports section of the Editor Main Menu

Send Reminder Letters

Click a link below to access the reminder report, from which reminder letters can be sent.

- Author Reminder Reports**
 - [Co-Author Reminder Report](#)
 - [Author Revision Status Report](#)
 - [Author Revision Reminder Report](#)
 - [Automated Author Revision Reminder Report](#)
 - [Automated Author Transfer Reminder Report](#)
- Invited Author Reminder Reports**
 - [Authors Invited - No Response](#)
 - [Author Invitation Status Report](#)
 - [Automated Author Invitation Reminder Report](#)
- Editor Reminder Reports**
 - [Assignment Status Report](#)
 - [New Assignments Report](#)
 - [Required Reviews Complete Report](#)
- Reviewer Reminder Reports**
 - [Reviewer Invited - No Response Report](#)
 - [Reviewer Reminder Report](#)
- ProDuXion Manager Reports**
 - [Submission Tasks Reminder Report](#)
 - [Schedule Group Tasks Reminder Report](#)
 - [Automated Submission Tasks Reminder Report](#)
 - [Automated Schedule Group Tasks Reminder Report](#)

[Main Menu](#)

Sample Reports section of the Proposal Menu

[Editorial](#) | [Proposal Menu](#) | [Production Tasks](#)

Managing Editor Proposal Menu

Search

[Search Proposals](#) | [Search Submissions](#) | [Search People](#)

New Proposals

[Initiate Proposal](#)

Part of page omitted

[View All Completed Proposals \(0\)](#)

[View All Submissions With No Pending Commentaries \(1\)](#)

Reports

- [Proposal Pipeline Report](#)
- [Authors Invited - No Response](#)
- [Author Invitation Status Report](#)
- [Automated Author Invitation Reminder Report](#)

Clicking the 'Automated Author Invitation Reminders link from any of the access points brings the user to the new Automated Author Invitation Reminders Report interface.

Similar to other automated reports in the EM system, criteria for a report can be defined and saved.

Sample Automated Author Invitation Reminders Report interface

Automated Author Invitation Reminder Report

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Author Invitation reminder e-mails will be sent once every 24 hours to each recipient.

Reminder Type:

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

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

Reminder Past Invitation Response Due Date: Send an automated reminder e-mail for invitations that are exactly days after their Invitation Response Due Date. To send reminders for invitation responses that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who have not agreed to or declined their invitation yet.

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

Reminder Before Submission Due Date: Send an automated reminder e-mail for invited submissions that are exactly days before their submission due date. Reminders will be sent to Authors who have agreed to their invitation, but have not submitted their manuscript yet.

Reminder Past Submission Due Date: Send an automated reminder e-mail for invited submissions that are exactly days past their submission due date. To send reminders for invited submissions that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who have agreed to their invitation, but have not submitted their manuscript yet.

Invitation Type:

Handling Editor:

Reminder Name:

Maximum 200 characters

Reminder Letter:

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

Proposal Article Type: [Select All](#)
 [Clear All](#)

Submission Article Type: [Select All](#)
 [Clear All](#)
 [Clear All](#)

Section / Category: [Select All](#)
 [Clear All](#)
 [Clear All](#)

[Save as Automated Reminder](#)

Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them. Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the Drag & Drop tool.

		Reminder Name	Reminder Type	Number of Days	Reminder Creator
🗑️	✍️	Past Due	Reminder Past Submission Due Date (Proposal)	7	Mary Shelby Roman
🗑️	✍️	Outstanding - 10 days	Outstanding Invitations (Proposal)	10	Mary Shelby Roman

[Return to Send Reminder Letters](#)
[Return to Editorial Menu](#)

The Reminder Type section allows the Report creator to refine report results:

- **Outstanding Invitations** - applies to open invitations (not agreed or declined) to a Proposal or Commentary that were sent [X] days ago and are still open. Eligible users with outstanding invitations will not receive a reminder every single day after [X] days have elapsed, but will receive a single reminder after [X] days have passed.
- **Reminder Before Invitation Response Due Date** - applies to open invitations (not agreed or declined) to a Proposal or Commentary where a response has not been received [X] days before the Invitation Response Due Date.
- **Reminder Past Invitation Response Due Date** – applies to open invitations (not agreed or declined) to a Proposal or Commentary where a response has not been received by [X] days after the Invitation Response Due Date.
- **Outstanding Submissions** – applies to Authors who have agreed to submit to a Proposal or Commentary [X] days ago
- **Reminder Before Submission Due Date** – sends automated reminders for invited submissions that are exactly [X] days before the submission due date
- **Reminder Past Submission Due Date** - sends automated reminders for invited submissions that are exactly [X] days past the submission due date

Selecting an Invitation Type from the drop down menu ('Invitations to a Proposal' or 'Invitations to Submit a Commentary') allows the report creator to further target desired results. When 'Invitations to Respond to a Proposal' is selected, the report creator may filter the results by the Proposal Article Type. When 'Invitations to Submit a Commentary' is selected, the Proposal Article Type multi-selector criterion box is suppressed.

The Report results may be further restricted to filter by the Handling Editor, Submission Article Type, or Section/Category.

NOTE: Opting to not select any criteria in a multi-selector box ('Proposal Article Type,' 'Submission Article Type,' and 'Section/Category') or the Handling Editor drop-down list will run the Report against all eligible Editors, Article Types, and/or Section Categories.

Before saving the Automated Reminder report, the user must select a Reminder Letter and create a unique name for the Report.

Once saved, a user will have access to their Automated Reminder Report in the 'Saved Automated Reminders' section at the bottom of the page. Clicking the pencil icon refreshes the page so the user may update the criteria of the report. Clicking the trash can icon removes the report. The order of the reports in the 'Saved Reports' section may be changed by dragging and dropping the record to the desired location.

TO CONFIGURE:

In Editor *RoleManager*, enable the new 'Create Automated Author Invitation Reminders' permission.

Sample 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
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- General Searching and Viewing
- Edit Submission
- Discussion Forums
- Transmittal Form
- Sending E-mail
- Viewing and Editing People Data
- Flag Icons
- Proxy Activities
- Administrative and Reporting Functions
 - System Administration Functions
 - Unrestricted Access
 - Restricted Access
 - Produce Reports
 - Schedule Reports
 - Run Cross-Publication Custom Reports
 - Run Cross-Publication Enterprise Analytics Reports for All Publications
 - Restrict to Selected Publication Groups:
 - Caroline and Janet 12.2 Sites
 - 13.0 Sites
 - TEST29190
 - 4 Journals for 13.0-44
 - ssss
 - Create Automated Reviewer Reminders
 - Send Reviewer Reminders
 - Send Editor Reminders
 - Create Automated Author Revision Reminders
 - Create Automated Author Transfer Reminders
 - Create Automated Author Invitation Reminders
 - Send Author Reminders
 - Restrict Reminder Reports to Assigned Submissions
 - Search/Manage Conference Submissions
 - Initiate Rebuttal
 - Set Final Disposition
- Cross-Publication Login
- Produxion Manager

MERGE FIELD ENHANCEMENTS

%ALL_AUTHORS_WITH_SELECTED_METADATA%

Enhancement

In EM version 12.2, the %ALL_AUTHORS_WITH_SELECTED_METADATA% merge field pulls in the Author Metadata selected on the 'Set Other Authors Parameters' page in *PolicyManager*. To include a piece of metadata in this merge field, the 'Include in Merge Field?' checkbox must be selected.

In EM version 13.0, this merge field will also pull in Contributor Roles introduced by the CRediT Taxonomy integration if 'Contributor Roles' data collection has been enabled by the publication and the 'Include in Merge Field?' checkbox is selected on the 'Set Other Authors Parameters' page for the 'Contributor Roles' option.

Sample Set Other Authors Parameters page in PolicyManager

Set Other Author Parameters

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

Deceased Status, Equal Contribution Status and Post-Publication Corresponding Author can be set as 'Hidden' or 'Display'. If these fields are set to display, the Add/Edit/Remove Authors submission step will display a checkbox so that an Author(s) can be designated as deceased or an equal contributor on the paper. The Post-Publication Corresponding Author designation does not impact the editorial workflow in any way; it is a designation that is indicated on the published article.

The %ALL_AUTHORS_WITH_SELECTED_METADATA% merge field pulls in your choice of metadata elements for all Authors (including the Corresponding Author) to use in letters. To specify metadata for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all elements you want to include. ([more...](#))

Cancel Submit

Other Author Parameters

Include in Merge Field?

Set "Title" Text Entry Box Preference:	Optional ▼	<input type="checkbox"/>
Given/First Name	Required	<input type="checkbox"/>
Set "Secondary Given/First Name" Text Entry Box Preference:	Hidden ▼	<input type="checkbox"/>
Set "Middle Name" Text Entry Box Preference:	Optional ▼	<input type="checkbox"/>
Family/Last Name	Required	<input type="checkbox"/>
Set "Secondary Family/Last Name" Text Entry Box Preference:	Hidden ▼	<input type="checkbox"/>

Complete list of Other Author Parameters not shown

Set "Secondary State" Text Entry Box Preference:	Hidden ▼	<input type="checkbox"/>
Set "Zip or Postal Code" Text Entry Box Preference:	Hidden ▼	<input type="checkbox"/>
Set "Country" Preference:	Optional ▼	<input type="checkbox"/>
Set "Contributor Roles" Preference:	Display ▼	<input checked="" type="checkbox"/>
Set "Deceased Status" Checkbox Preference:	Display ▼	<input type="checkbox"/>
Set "Equal Contribution Status" Checkbox Preference:	Display ▼	<input type="checkbox"/>
Set "Post-Publication Corresponding Author" Checkbox Preference:	Display ▼	<input type="checkbox"/>

Cancel Submit

Author Contributor Roles Merge Field

Version 13.0 of Editorial Manager offers the option of using CRediT Taxonomy to collect Contributor Roles for Authors of a submission. For publications using this new feature, a new merge field - **%AUTHOR_CONTRIBUTOR_ROLES%** - can be used to pull in an Author's Contributor Roles into the letter sent to a Co-Author when they are asked to verify or verify and register authorship for a submission.

The merge field pulls in the Contributor Roles for the recipient, listed in alphabetical order and concatenated into a single string, separated by semicolons. If the publication is also collecting 'Degrees of Contribution', the Degree of Contribution is displayed after the Contributor Role name. This merge field is only populated in the letter configured to be sent to an Author for the *ActionManager* event 'Notify Other Authors.'

All Authors and Contributor Roles Merge Field

Version 13.0 of Editorial Manager offers the option of using CRediT Taxonomy to collect Contributor Roles for Authors of a submission. For publications using this new feature, another new merge field - **%ALL AUTHORS_AND_CONTRIBUTOR_ROLES%** - is available for use in all letters associated with a submission.

This merge field is similar to the existing **%ALL_AUTHORS%** merge field, except that Contributor Roles are included for each Author in the list (if the publication has been configured to collect this information). When merged into a letter, each Author is listed on a new line with their set of Contributor Roles listed (enclosed in parentheses) after the Author's Degree. Each Contributor Role and respective Degree of Contribution is separated from the next by a semicolon.

NOTE: This merge field will not populate in the 'Notify Author' (Decision) letter for publications running a double-blind peer review process. When the letter is sent to the Author, they will be able to view the data pulled in by the **%ALL_AUTHORS_AND_CONTRIBUTOR_ROLES%** merge field. Reviewers accessing the Decision Letter from the 'Completed Assignments' folder will see this merge field displayed as asterisks only.

ORCID Authentication Deep Link

In EM version 12.2, a user's ORCID iD may be collected in the following ways:

- An ORCID iD field can be configured to display as a Registration field.
- An ORCID iD field can be configured to display to an Editor during proxy registration.
- An ORCID iD field can be added to Other Author fields.
- ORCID iDs can be requested from Corresponding Authors during submission and from co-Authors during verification.

New in EM version 13.0, an ORCID Authentication Deep link is available for use in any letter to existing Editorial Manager users-

%ORCID_AUTHENTICATE_DEEP_LINK% - that allows publications to follow-up with existing users to confirm whether or not they have an ORCID iD and prompt users to Authenticate their ORCID iD stored in Editorial Manager if they have not already done so.

NOTE: This merge field may not be used in Co-Author Verification letters, as they are likely not registered EM users at that point in the workflow.

When the **%ORCID_AUTHENTICATE_DEEP_LINK%** is included in a letter to a registered Editorial Manager it can appear as one of the following ways:

- If the primary Recipient's EM People record has an Authenticated ORCID iD, text reading "Your ORCID iD: [ORCID iD Value] is already linked and Authenticated." is inserted into the e-mail text.
- Otherwise (the recipient's EM People Record does not have an Authenticated ORCID iD), a deep link is inserted into the resulting letter using standard EM Deep link functionality.

After clicking the deep link, the user is directed to the ORCID site to complete the authorization request. When a successful ORCID iD authorization has been processed, the user is returned to a new 'ORCID iD Retrieved' page in Editorial Manager. Entering a password and clicking the 'Link my ORCID iD' button associates the authorized ORCID iD with the Editorial Manager user record.

Sample ORCID iD Retrieved interface after returning from ORCID

ORCID iD Retrieved

Please supply your password for JXYZ [Insert Special Character](#)

Your Full Name Dr John Q MacJohn BSc
Password

Thank you for allowing Editorial Manager to retrieve your ORCID iD.
To add this to your user record in *The Journal of X, Y and Z*, please supply your Editorial Manager password and click 'Link my ORCID iD'.

checkCIF Results Merge Field

A new **%CHECKCIF_RESULTS_PDF%** merge field is added in EM/PM version 13.0 for publications using checkCIF to test the integrity of .cif files submitted to their publication. This merge field is eligible for use in all submission-related letters.

If only one file associated with the current revision of the submission is configured to be sent to the checkCIF tool and has already generated a checkCIF results PDF, clicking the deep link generated by the **%CHECKCIF_RESULTS_PDF%** will initiate a download of the results PDF.

If there are multiple files associated with the current revision of the submission configured to be sent to the checkCIF tool, clicking the deep link generated by the **%CHECKCIF_RESULTS_PDF%** generates a pop-up window of the checkCIF results page (Author/Reviewer View). The user is not logged into Editorial Manager.

APPENDIX: BOOKS PROCESSING

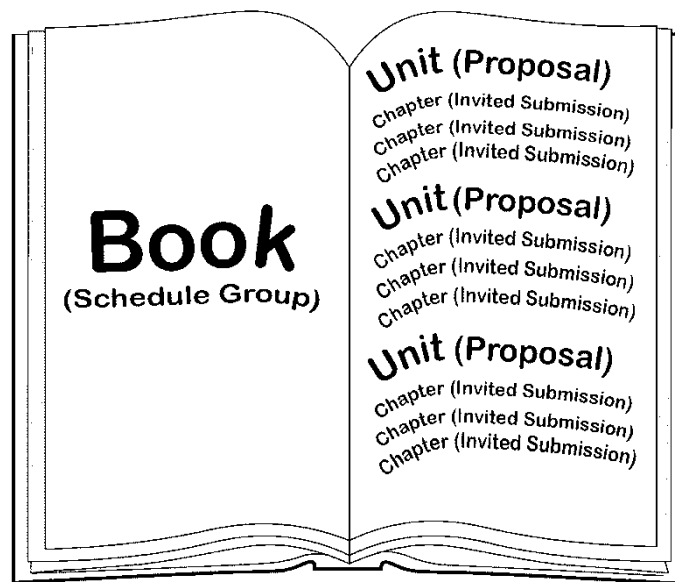
Book Processing

EM/PM version 12.2 supports the creation of “Issues” (a set of articles) through the use of the Proposals interface as well as Schedule Groups (for publications using Production Tracking). Using these features, Editors are able to collect submissions for an Issue of a publication and copy all Target Publication details to the submissions within the issue. Currently, Proposals cannot be associated with a Schedule Group.

New in EM/PM version 13.0, the Proposal and Schedule Group features are enhanced to allow for the processing of books, for sites using ProduXion Manager. Books processing requires more levels in workflow hierarchy than an issue:

- **Book:** This is the “shell” of the collection of material within. Using the new EM Books Processing feature, this is handled by an enhanced version of the existing Schedule Groups functionality.
- **Unit/Component:** This is a collection of chapters or a collection of invited material. The Proposal functionality is enhanced to organize the units and/or components of a book.
- **Chapter:** This is the content of the unit/component. Using Editorial Manager Books Processing, the chapters are handled by using Invited Submissions (related to Proposals which are then associated with a Book Schedule Group).

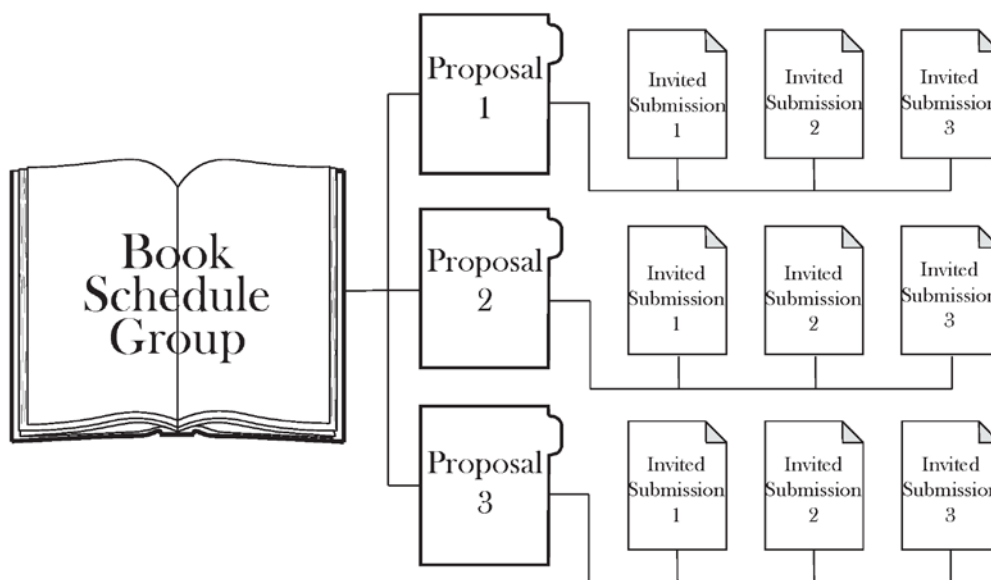
A “Book” made with Editorial Manager and ProduXion Manager



To accommodate a Book Processing workflow, a Proposal (or “Unit”) may now be associated with a Schedule Group (“Book”) at the same time the Proposal is initiated. When a Proposal is associated with a Schedule Group, the Schedule Group’s values for ‘Target Publication Date’ and ‘Target Publication Volume’ are applied to the Proposal, which is shown as a header in the Schedule Group Table of Contents. Invited

Submissions within the Proposal also inherit the Schedule Group's values for 'Target Publication Date' and 'Target Publication Volume.' Once submitted, these invited submissions display in a new 'Pre-selected Submissions grid associated with the Schedule Group. When production is initiated for these submissions, they will be moved into the Table of Contents for that Schedule Group. New book-related system fields are added to EM & PM ('ISBN,' 'Edition,' etc.) for data entry and display on a new "Books" Default Details page layout.

General Workflow



Once all of the *PolicyManager* configurations have been set, the publication may start a Book-related Proposal by going to the 'Proposals Menu' Tab and clicking 'Initiate Proposal.' From there, the user must select a Proposal Article Type that has been configured as 'Book-related' in 'Edit Article Types.'

Initiate Proposal

Select an Article Type for the proposal, then enter a Proposal Title and other information.

* Article Type: None None Special Issue New One Book

Cancel

The Book-related Proposal Article Type can be configured to allow assignment to a Book Schedule Group. Publications that have this option set to 'Required' will not be able to proceed from the page without assigning the Proposal to a Schedule Group. This setting may also be configured as 'Optional' or 'Hidden.'

Sample Initiate Proposal page – Schedule Group Assignment is Required and there are existing Book-related Schedule Groups available

The screenshot shows a web form titled "Initiate Proposal". At the top, there is a message box stating: "Selecting a Schedule Group is required. Once a Schedule Group has been selected, information from that Schedule Group will be displayed automatically, and Proposal creation can continue. A Schedule Group can be added to the list by clicking the 'Add Schedule Group' link." Below this, there are two required fields: "Article Type" with a dropdown menu set to "Book", and "Schedule Group" with a dropdown menu showing "Please Choose a Schedule Group" and a blue link "Add Schedule Group". The "Schedule Group" field is highlighted with a green border. At the bottom of the form are "Cancel" and "Proceed" buttons.

In the event that Book-related Schedule Groups have not yet been configured for the publication, the 'Add Schedule Group' link is available. Clicking 'Add Schedule Group' will take the user to an enhanced version of the existing Add Schedule Group page. Book-related metadata (highlighted in the screen shot below) may be entered.

Sample Add Schedule Group page, accessed from Initiate Proposal interface – Book-related metadata highlighted in yellow

Add Schedule Group

Schedule Group Description: Maximum Schedule Group Description is 100 characters

Title: Maximum 2000 characters

Schedule Group Notes:

ISBN:	<input type="text"/>
Edition:	<input type="text"/>
Authors/Volume Editors:	<input type="text"/>
Schedule Group Target Online Publication Date:	<input type="text"/> <input type="button" value="..."/> (mm/dd/yyyy)
Schedule Group Target Publication Date:	<input type="text"/> <input type="button" value="..."/> (mm/dd/yyyy)
Schedule Group Target Publication Volume:	<input type="text"/>
Year:	<input type="text"/>
Target Number of Submissions:	<input type="text"/>
Page Budget:	<input type="text"/>
Black and White Image Budget:	<input type="text"/>
Doppler Black and White Budget:	<input type="text"/>
Color Image Budget:	<input type="text"/>
Doppler Color Budget:	<input type="text"/>
FIGS: Total # of parts:	<input type="text"/>
Estimated Figure pp:	<input type="text"/>
Char Count Text:	<input type="text"/>
Text (ms pp):	<input type="text"/>
Estimated Text pp:	<input type="text"/>
References (#):	<input type="text"/>
Estimated Reference pp:	<input type="text"/>
Tables (#):	<input type="text"/>
Estimated Table pp:	<input type="text"/>
Estimated Printed pp:	<input type="text"/>
Previous edition pp:	<input type="text"/>

After assigning the Proposal to a Schedule Group, the user is navigated back to the Initiate Proposal interface. This page has also been enhanced to collect Book-related metadata for the Proposal. Some Schedule Group information is pulled into this page:

- Schedule Group ISBN
- Schedule Group Edition
- Schedule Group Authors/Volume Editors
- Target Publication Date
- Target Publication Volume

As in existing functionality, the Editor initiating the Proposal may pre-select an Invited Article Type (or allow the invited Author to choose) for all submissions associated with the Proposal. A title for the Book-related Proposal must be entered. If the Editor

creating the proposal has 'Override Author Invited Submission Due Dates' permission (recommended), they will be able to edit the 'Author Response Due' and 'Author Submission Due.' Otherwise, the Proposal will use the settings configured in 'Edit Article Type' for the Proposal.

Sample Initiate Proposal page after being added to a Schedule Group and an Article Type for the Invited Submissions has been selected – Book Schedule Group information has been pulled in and new book-related metadata has been highlighted in yellow

Initiate Proposal

Pre-selecting an article type for invited submissions is optional. The 'Author Will Select' option allows the invited Author to select from a list of invited article types.

* Article Type:	Book
* Schedule Group:	Proposed Book
Schedule Group ISBN:	978-1-4963-0068-3
Schedule Group Edition:	4
Schedule Group Authors/Volume Editors:	Peter Parker
Pre-select Article Type for Invited Submissions generated from this Proposal	Special Issue Article
* Title:	<input type="text"/>

[Insert Special Character](#)

Target Publication Date:	Mar 10 2020 12:00:00:000AM
Target Publication Volume:	1
Page Budget:	<input type="text"/>
Character Count text:	<input type="text"/>
Text (ms pp):	<input type="text"/>
Estimated Text pp:	<input type="text"/>
References (#):	<input type="text"/>
Estimated Reference pp:	<input type="text"/>
Tables (#):	<input type="text"/>
Estimated Table pp:	<input type="text"/>
Black and White Image Budget:	<input type="text"/>
Doppler Black and White Budget:	<input type="text"/>
Color Image Budget:	<input type="text"/>
Doppler Color Budget:	<input type="text"/>
FIGS: Total # of parts:	<input type="text"/>
Estimated Figure pp:	<input type="text"/>
Estimated Printed pp:	<input type="text"/>
Previous edition pp:	<input type="text"/>
Author Response Due: Number of Days Author has to Respond to Invitation	0 <small>A value of zero indicates the Response due date feature is not being used.</small>
Author Submission Due: Number of Days prior to Target Publication Date	0 <small>A value of zero indicates the Submission due date feature is not being used.</small>

NOTE: The following metadata are not inherited by the Book-related Proposal from the Schedule Group, but are available for data entry on this page, so that unit/component-specific data can be entered

- Character Count Text
- Text (ms pp)
- Estimated Text (pp)
- References (#)
- Estimated Reference pp
- Tables (#)
- Estimated Table pp
- Doppler Black and White Budget
- Doppler Color Budget
- FIGS: Total # of parts
- Estimated Figure pp
- Estimated Printed pp
- Previous edition pp

As in existing functionality, the Editor may proceed from the Initiate Proposal page four different ways:

- ‘Cancel’ – allows the Editor to cancel out of the proposal creation
- ‘Proceed and Build PDF’ – this button navigates the Editor to the Submit Manuscript interface, where the Editor can fill in additional information (as configured for the Article Type) and attach any files for invited Authors to review.
- ‘Proceed with no PDF’ – this button will build a proposal and place the proposal in the ‘New Proposals Requiring Assignments’ folder
- ‘Assign to Myself and Invite Authors’ – this button will build a proposal, place the proposal in the Editor’s ‘New Assignments – Proposals’ folder, and navigate the Editor to the ‘Author Selection Summary’ page to initiate Author invitations

After creating the proposal (and approving the PDF, if applicable), the proposal must be assigned to an Editor to handle the Author Invitation process (if the ‘Assign to Myself and Invite Authors’ option wasn’t used).

NOTE: When an Editor edits an existing Book-related Proposal, they will only be able to change the Article Type to another ‘Book-related’ proposal article type. Regular (or “Issue”) Proposal Article Types will not be available on the Article Type drop down menu.

The Author Invitation experience is generally unchanged for publications configured for Books Processing. The Assigned Editor can click the ‘Invite Authors’ action link from the ‘New Assignments – Proposals’ folder located on the Proposal Menu. The Editor may then search for Authors to invite by entering Author criteria or Personal Classifications,

or selecting them from an uploaded Author List File. Additionally, an Editor with 'Proxy Registration' permission may Register a new user and Invite them to the Proposal. After selecting the checkboxes next to one or more Authors to invite from the results set, the Editor can proceed to the 'Select Authors - Confirm Selection and Customize Letters' page. If the Article Type is configured to 'Allow Editor to predefine submission title values' or if the publication is configured to 'Display Invitation Notes to Author,' then the Editor may enter that information. Additional actions on this page include Invitation Letter customization and adjusting the Author Due Dates.

The Author-facing aspect of submitting an invited submission is the same as in existing functionality except in cases where the publication has pre-defined the Invited Submission Article Title. Once an invited Author submits the paper to the publication, the submission will show in the Book Schedule Group's 'Pre-selected Submissions' grid on the 'Edit Group Details' page for the Book Schedule Group.

Sample Pre-selected Submissions grid displayed at the bottom of the Edit Group Details page – the grey header at the top of the grid indicates the Proposal associated with the submissions.

Pre-selected Submissions																											
Actions	Target FDC Position	Manuscript Number	Article Type	Article Title	Editor Originating Proposal	Author Name	Target Number of Pages	Editorial Status	DOI	Previous Edition Chapter	Previous Edition pp.	Char Count Text	Text (ms pp)	Est. Text (e)	References pp.	Est. Ref. (e)	Tables pp.	Est. Table (e)	Black and White Image Count	Doppler Black and White Count	Color Image Count	Doppler Color Count	FIGS: # of Parts	Est. Fig. pp.	Printed pp. (est)	Submission Target Online Date	Submission Actual Online Date
	1	Kristin132	Book	Proposed Book Unit 1	Mary Shelby Roman		0	Author Invited											0	0	0						
Details > Transmittal Form				Chapter Chapter 2: Building on the Previous		Jarvis Cocker	0	Submitted to Journal											0	0							
View Reviews and Comments																											
Details > Transmittal Form				Chapter Chapter 5: Winning Friends		Kristin 7.0	0	Submitted to Journal												0	0						
View Reviews and Comments																											
Details > Transmittal Form				Chapter Chapter 6: Feel Free to Change this Title		Baloo Bear	0	Submitted to Journal												0	0						
View Reviews and Comments																											
Details > Transmittal Form				Chapter Chapter 8: In Summation		Virginia Ayette	0	Submitted to Journal												0	0						
View Reviews and Comments																											

The submissions in the 'Pre-selected Submissions' grid are solicited submissions that have been submitted to the publication and are associated with a Proposal that was assigned to the Schedule Group but are not currently in production. Therefore, they are not "officially" part of the Schedule Group. Submission Production Tasks, Schedule Group Production Tasks, and Batch Production Tasks may not be assigned to any of these submissions. Additionally, these submissions may not be added to any other Schedule Groups since they are not in production yet.

Once production has been initiated on a pre-selected submission, it moves to the Table of Contents grid directly above. The Table of Contents grid automatically uses Proposals associated with the Schedule Group as "headers." When an invited submission within a Proposal enters production, the submission moves to a position in the Table of Contents underneath its Proposal Header and the Table of Contents automatically rennumbers to accommodate the new addition.

NOTE: Publications may also add additional headers via the 'Insert Header' button at the bottom of the Table of Contents grid. This is existing functionality.

Sample Edit Group Details (partial) layout – a submission in the Proposed Book Unit 1 proposal is in production and is listed in the Table of Contents underneath its Proposal header

Edit Schedule Group Details/Add Submissions

[Submit](#) [Cancel](#) [Add Submissions](#)

Schedule Group Description: Maximum Schedule Group Description is 100 characters

Title: Maximum 2000 characters

Schedule Group Notes:
No notes yet.

Schedule Group metadata not pictured

[Download Table of Contents](#) [Download Table of Contents in UTF-8 Format](#)

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Editor Original Proposal	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	Previous Edition DOI	Previous Edition Chapter	Previous Edition pp	Char Count Text	Text (ms) Text (pp)	Est. References (#)	Est. Ref. pp	Tables (#)	Est. Table pp	Black and White Image Count	Doppler Black and White Count	Color Image Count	Doppler Color Count	FIGS: Total # of Parts	Est. Fig. pp (est)	Printed Target Date	Submission Online Date	Submission Actual Date
Details ¹ Remove Header	1	Kristn132	Book	Proposed Book Unit 1	Mary Shelby Roman		0													0	0	0						
Production Details ¹ Transmittal Form Remove from Group Linked Submissions	2		Chapter	Chapter 3: Middle of the Road	Jordan B. Cabelans, Ph.D		0	0	0											0	0							
Details ¹ Remove Header	3	Kristn133	Book	Book	Mary Shelby Roman		0													0	0	0						

[Update TOC](#) [Insert Header](#)

Pre-selected Submissions

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Editor Original Proposal	Author Name	Target Number of Pages	Editorial Status	DOI	Previous Edition Chapter	Previous Edition pp	Char Count Text	Text (ms) Text (pp)	Est. References (#)	Est. Ref. pp	Tables (#)	Est. Table pp	Black and White Image Count	Doppler Black and White Count	Color Image Count	Doppler Color Count	FIGS: Total # of Parts	Est. Fig. pp (est)	Printed Target Date	Submission Online Date	Submission Actual Date	
Details ¹ Transmittal Form View Reviews and Comments	1	Kristn132	Book	Proposed Book Unit 1	Mary Shelby Roman		0	Author Invited											0	0							
Details ¹ Transmittal Form View Reviews and Comments			Chapter	Chapter 2: Building on the Previous	Jarvis Cocker		0	Submitted to Journal											0	0							
Details ¹ Transmittal Form View Reviews and Comments			Chapter	Chapter 5: Winning Friends	Kristin		7.0	Submitted to Journal											0	0							
Details ¹ Transmittal Form View Reviews and Comments			Chapter	Chapter 6: Feel Free to Change this Title	Baloo Bear		0	Submitted to Journal											0	0							
Details ¹ Transmittal Form View Reviews and Comments			Chapter	Chapter 8: In Summation	Virginia Ayotte		0	Submitted to Journal											0	0							

[Submit](#) [Cancel](#) [Add Submissions](#)

NOTE: Production is initiated on an invited submission outside of the Pre-selected Submissions Grid using existing functionality. However, if the submission is in the Pre-selected Submissions grid for a Schedule Group and the user initiating production does not change the Schedule Group for that submission or does not have the permission to assign the submission to a Schedule Group, then the submission is automatically assigned to that Schedule Group when production is initiated. Once the invited submission is in production and part of the Book Schedule Group’s Table of Contents, it is eligible for Submission Production Task, Schedule Group Tasks, and Batch Assignments. If the publication is configured to allow assignment of a single submission to multiple Schedule Groups, the invited submission may be added to other Book Schedule Groups, but as with current functionality, one of the Schedule Groups has to be designated the Controlling Group. Book-related invited submissions cannot be added to regular (“Issue”) Schedule Groups.

NOTE: If ‘Remove from Group’ is clicked for a Proposal header in the Table of Contents grid, the proposal header will be removed from the TOC, but its associated submissions will not be automatically removed from the TOC or the Pre-selected Submissions grid

from the group. Since Book-related proposals can only be associated with a Schedule Group when the proposal is initiated, the removed proposal cannot be re-added or associated with any other Schedule Groups in the future, however, submissions associated with the Proposal can be assigned to this Schedule Group or another Schedule Group. If submissions related to the removed proposal are in Production and part of the Schedule Group Table of Contents, and the publication wants to remove them from the Schedule Group, they can be removed individually via the 'Remove from Group' link for the submission.

Add Regular Submissions to a Book-related Schedule Group

Submissions that are not associated with a Proposal can be added to Book Schedule Groups in two ways; 'pulled' into the Schedule Group from the 'Edit Schedule Group Details' page, or 'pushed' into a Schedule Group from various folders on the Production Tasks menu and the Search Results page.

From the 'Manage Schedule Groups' folder, the 'Edit Group Details' link opens a page where the Schedule Group details can be edited and submissions can be added to the Schedule Group by clicking the 'Add Submissions' button. An Editor or Publisher may choose from unassigned submissions, or switch to a list of assigned submissions, allowing the user to move submissions into the current Schedule Group from others. Once new submissions have been added, the user returns to the 'Edit Group Details' page, where the order of submissions may be updated.

NOTE: When adding submissions to a Schedule Group via the 'Add Submissions' button, this switches submissions from the Current Schedule Group to the new Schedule Group (if applicable), even if the user is allowed to assign submissions to multiple Schedule Groups. If the 'Select from Submissions Assigned to Other Schedule Groups' option is selected, this will remove the submission from all other Schedule Groups to which it currently belongs and add it to the new group.

Alternately, an Editor or Publisher can use 'Assign to Schedule Group' or 'Change Schedule Group' links available in folders on the Production Tasks menu and on the Search Results page. These links allow a user to assign the specific submission to a Schedule Group, or to change the existing Schedule Group associated with the submission.

NOTE: Submissions may belong to more than one Schedule Group. Submissions currently can only be "pushed" into multiple Schedule Groups via 'Assign to Schedule Group' or 'Change Schedule Group' links in Production Task folders.

NOTE: Book-related metadata details fields are only available for a submission once it has been associated with a book-related Proposal or a Book Schedule Group.

NOTE: Invited Submissions that are associated with "regular" (non-Book) proposals cannot be added to a Book Schedule Group. Copy Book Schedule Group

Publications can copy existing Schedule Groups to create a new Schedule Group with the same Table of Contents entries and the same target information.

When an Editor or Publisher has 'Manage Schedule Groups' permission (but no sub-permissions) and clicks the 'Copy Schedule Group' link, a new Schedule Group is created with metadata copied from the original Schedule Group. No submission or Header records are copied. The user is brought to a Schedule Group Copy page and they can then edit the metadata as desired.

If the 'Manage Schedule Groups' permission and 'Copy Contents when Copying a Group' sub-permission are both enabled, but the 'Assign to Multiple Schedule Groups' permission is not, they may copy metadata and/or Table of Contents Headers from the original group. After selecting information to copy, the Editor or Publisher is taken to the Schedule Group Copy page to edit data and Headers.

If a logged in user has 'Copy Contents when Copying a Group' sub-permission and 'Assign to Multiple Schedule Groups' permission, they then have the ability to either copy the metadata of the group (Target Publication dates, etc.), copy the submissions and Table of Contents Headers, or copy the metadata along with the submissions and Table of Contents Headers. After selecting information to copy, the user is brought to the Schedule Group Copy page where they can remove submissions and edit data.

NOTE: When a Book Schedule Group contents are copied, any submissions in the 'Pre-selected Submissions' grid are not carried over to the copy. Only submissions in production (part of the Table of Contents) will be carried over to the copied group.

Any proposal headers are copied as new proposals and associated with the new SG, and new author invitations may be generated from them. The old Proposals are not associated with the new Schedule Group, but submissions that were generated from those old Proposals may be part of the new Schedule Group's TOC.

Close Book Schedule Group

If there are any submissions in the 'Pre-selected Submissions' grid for the Schedule Group, clicking the 'Close Group' link (and proceeding from the warning message) will remove the pre-selected submissions from the Schedule Group. Clicking the Close Group link warns the user that there are submissions in the Pre-selected Submissions grid that are not yet officially associated with the Schedule Group. The user can elect to proceed, which will remove the submissions from the Pre-selected Submissions grid, or can elect to leave the Schedule Group open.

Reporting

Two new views are added to 'Custom Reports' and single-journal 'Enterprise Analytics Reporting' so that publications may report on Book-related submissions and Book Schedule Groups:

- **Book Submission Production View**
 - Combines existing submission-level metadata fields with new book-specific fields.
- **Book Schedule Groups View**
 - Combines existing Schedule Group-level metadata fields with new book-specific fields.
 - This view is limited to Book Schedule Groups only.

Two new views are added to ‘Cross-Publication Enterprise Analytics Reporting’:

- **Cross-Publication Book Submission Production View**
 - Combines existing submission-level metadata fields with new book-specific fields.
- **Cross-Publication Book Schedule Group View**
 - Combines existing Schedule Group-level metadata fields with new book-specific fields.
 - This view is limited to Book Schedule Groups only.

Configuration

To configure a publication for Books processing, a new ‘Configure Books Processing’ page is added in *PolicyManager*. The link to this page is found under the ‘ProduXion Manager’ heading.

Sample Configure Book Processing page

Configure Book Processing

Use this page to configure the publication to process books. Selecting the checkbox ‘Enable Book Processing’ will enable book-related metadata to be entered and displayed throughout the system. Selecting the checkbox ‘New Schedule Groups are automatically created in the Book Schedule Group Family’ will cause the ‘Add Schedule Group’ interface to contain only book-related metadata. Leave this setting unselected/unchecked to allow the user to choose the Schedule Group family when the Schedule Group is added.

Enable Book Processing
 New Schedule Groups are automatically created in the Book Schedule Group Family

Selecting the ‘Enable Book Processing’ checkbox will allow the new book-specific metadata to be entered and displayed in EM/PM. Selecting the sub-option ‘New Schedule Groups are automatically created in the Book Schedule Group Family’ will cause all newly created Schedule Groups to use the book-specific metadata.

Edit Article Type

After Book Processing has been enabled, at least one Proposal Article Type must be configured as 'Book-related' if the journal wants to use Proposals to accumulate book chapters. Go to 'Edit Article Types' in *PolicyManager* and add a new article type in the 'Proposal' family.

Sample Add Article Type page – the Article Type is assigned to the Proposal Family and designated as Book-related. 'Assign to Schedule Group' must be set to 'Optional' or 'Required.' If the publication wants to associate the Proposal with a Schedule Group. Also, to use the new Article Type, the 'Hide' checkbox must be de-selected.

Add Article Type

Cancel Submit

Article Type: Book Proposal

Maximum Article Type name is 75 characters.

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

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

Assign the 'Proposal' Family to Editor-generated Article Types.

Assign to Schedule Group: Hidden

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

Allow file uploads from arXiv.org server

Duplicate Submission Check: Check for duplicate submissions to Editorial Manager

Select 'Proposal' from the 'Family' drop-down list and select the 'Book-related' checkbox option.

By default, the 'Assign to Schedule Group' is 'Hidden,' but this setting must be changed to 'Optional' or 'Required' to allow the proposal to be associated with a Schedule Group. As in existing functionality, all new Article Types default to hidden, so the 'Hide' checkbox must be de-selected.

Additionally, make sure there are Article Types in the 'Regular' Family that have the 'Invited' checkbox selected.

Details Page Layout

A new 'Default Books' Details page layout is added that includes all new book-related metadata. In the 'General Policies' section of *PolicyManager*, click the 'Define Details Page Layouts' link.

Sample Details Page Layouts page

Details Page Layouts

You can create custom Layouts for the Details page, controlling the information each user can see. After defining a custom Layout, use RoleManager to select the correct Details Page Layouts to be used by each Editor or Publisher role. Note that a Layout cannot be removed from this list if it is currently selected for use by any role. Use the **Copy** link to create a new Layout based on an existing one.

Default Layouts			
Default Editorial			Copy
Default Proposals			Copy
Default Production			Copy
Default Books			Copy

User-Defined Layouts			
asd	Remove	Edit	Copy
Blank Layout	Remove	Edit	Copy
Copy of Default Editorial	Remove	Edit	Copy
Copy of Default Proposals	Remove	Edit	Copy
Default Books for M.E.	Remove	Edit	Copy
Editorial Details for Managing Editor	Remove	Edit	Copy
Editorial Kitchen Sink	Remove	Edit	Copy
New Layout	Remove	Edit	Copy
New Layouts	Remove	Edit	Copy
Production Details for Managing Editor	Remove	Edit	Copy
Super of Default Proposals	Remove	Edit	Copy
TOC Editorial	Remove	Edit	Copy

[Add New Layout](#)

[Return to PolicyManager](#)

To add book-related metadata to a custom Details page layout, click the 'Add New Layout' button (to start from scratch) or the 'Edit' link for an existing layout. Click the 'Select Items to Display' link. New book metadata fields are added to the 'Publishing and Production Information' section and are available for inclusion on Custom Details page layouts for publications enabled for Books Processing.

Sample Select Items to Display page – book metadata fields highlighted in yellow

Select Items to Display for Default Books for M.E.

Select the information to appear on the Details page

* Items marked with an asterisk are subject to additional permissions, which may mean that some users will not be able to view them until you give them the additional permission to do so in RoleManager.

[Expand All](#) [Collapse All](#)

- Links**
- Information Submitted by Author**
- General Manuscript Information**
- Proposal Specific Information**
- Additional Manuscript Details**
- Key Workflow Dates and Status Information**
- Information for Invited Article Types**
- Assignments and Invitations**
- Publishing and Production Information**
 - All Open Schedule Groups
 - Schedule Group (Controlling Schedule Group Description)
 - Schedule Group Title (Controlling Group)**
 - Schedule Group ISBN (Controlling Group)**
 - Schedule Group Edition (Controlling Group)**
 - Schedule Group Authors/Volume Editors (Controlling Group)**
 - Schedule Group Target Online Publication Date (Controlling Group)
 - Schedule Group Target Publication Date (Controlling Group)
 - Schedule Group Target Volume (Controlling Group)
 - Schedule Group Target Issue (Controlling Group)
 - Position in Schedule Group Contents (Controlling Group)
 - Target Number of Pages (Submission/Controlling Group)
 - Target Start Page (Controlling Group)
 - Target End Page (Controlling Group)
 - Black and White Image Count
 - Doppler Black and White Count**
 - Color Image Count
 - Doppler Color Count**
 - Submission Target Online Publication Date
 - Submission Target Publication Date
 - Submission Target Volume
 - Submission Target Issue
 - Submission Actual Online Publication Date
 - Submission Actual Publication Date
 - Submission Actual Number of Pages
 - Submission Actual Start Page
 - Submission Actual End Page
 - Submission Actual Volume Number
 - Submission Actual Issue Number
 - Submission Actual TOC Position
 - Previous Edition Chapter**
 - Previous Edition pp**
 - Char Count Text**
 - Text (ms pp)**
 - Estimated Text pp**
 - References (#)**
 - Estimated Reference pp**
 - Tables (#)**
 - Estimated Table pp**
 - FIGS: Total # of parts**
 - Estimated Figure pp**
 - Estimated Printed pp**

[Expand All](#) [Collapse All](#)

After selecting the metadata and submitting the page, the user is navigated back to the Custom Details Page layout page, where the order of the added metadata may be rearranged. The Default Books layout is available for selection in Editor & Publisher *RoleManager* in all 'Details' drop down lists. The books metadata is only available for a submission on the Details page if the submission is associated with a book proposal or book Schedule Group.

RoleManager

Editors need to have the following *RoleManager* permissions turned on in order to create and manage a Proposal:

- 'Initiate Proposals'
- 'Invite Authors/Solicit Commentaries'
- 'Override Author Invited Submission Due Dates'

Also useful are:

- 'Search All Proposals'
- 'View All Proposals and Submissions with Commentaries'
- 'Send Author Reminders'
- 'Set Final Disposition on Proposals'
- 'Receive Assignments in 'New Assignments' Folder' (for 'Assign Proposal to Myself' option)

Both Editors and Publishers may manage Book Schedule Groups. To allow this, select the 'Manage Schedule Groups' permission in Editor or Publisher *RoleManager*.