RELEASE NOTES DIGEST 13.1

GENERAL ENHANCEMENTS

ORCID Enhancements	It is now possible to configure sites so that users register using ORCID. Users can then populate EM with select ORCID fields upon registration. It is also now possible to require a Corresponding Author to have an Authenticated ORCID in order to submit a manuscript. **How configured:** For registration, in *PolicyManager*, "Edit Registration Fields", check "Require Users to Authenticate with ORCID" (Recommended), and "Ask Users to Register via ORCID by Default." Also under *PolicyManager*, "Configure Login Page", check "Login via ORCID." To require a Corresponding Author to Authenticate with ORCID, in *PolicyManager*, "Edit Article Types", under Author Parameters, "Authenticated ORCID iD Request" choose "Required." **Time to configure:** About 10 minutes
Exclude Users from Batch E-mail Reminders	Editors now can exclude individual users from receiving batch and reminder emails. Users can be excluded from all reminders, or these reminders can be excluded just during times when the user is unavailable. **How configured:** A checkbox is available on the "Search People—Update Information" page for Editors. **Time to configure:** Less than 5 minutes for a single user.
Hide Preferred Method of Contact	To reduce the burden on journal staff and to reflect the reality that most editorial contact occurs by e-mail, System Administrators may now hide the existing author-specified Preferred Method of Contact throughout the system. **How configured:** In *PolicyManager*, under E-mail and Letter Policies, choose "Manage Preferred Method of Contact Settings," and click the checkbox next to "Hide Preferred Method of Contact." **Time to configure:** Less than 5 minutes
Default Reviewer Letters for Revision	All "Reviewer Invited/Assigned" events can now have three default letters associated with them based on whether the submission is original, a revision, or a revision for which the Reviewer has reviewed a previous version. **How configured:** First, create letters in *Policy Manager*, "Edit Letters," "Reviewer Invitation" letter family. Then Select default letters for revisions in *ActionManager*, "[Reviewer Role] Letters." Finally, for each of the "Reviewer Assigned" events ("Reviewer Invited", "Reviewer Assigned", "Reviewer Agree", and "Promote Alternate Reviewers"), click "Select Letters" to associate default letters. **Time to configure:** About 30 minutes

Alternate Reviewer Promotion Configuration Option	Historically Alternate Reviewer promotion has been restricted so that only Reviewers with the same role could replace a Reviewer who declined an invitation. It is now possible to automatically promote Alternate Reviewers regardless of their Reviewer Roles. **How configured:** In *Policy Manager,* "Edit Article Types", Reviewer Parameters. "Automatically Promote Alternate Reviewers" should be checked, and the sub-option "Only Promote unlinked Alternate Reviewers with MATCHING Roles" should NOT be checked. **Time to configure:** Less than 5 minutes

Search Submission Criteria Additions	The following criteria are added to "Search Submissions:"
	  1. Technical Check Complete Date (Current Revision), when configured
	  2. Editor Decision Term (Latest)
	  3. Handling Editor Role
	  4. Assigned Editor Role
	  5. First Receipt Date
	
	How configured: No configuration

Bibliometric Intelligence Analysis	Metaᵃ's Bibliometric Intelligence tool is integrated with Editorial Manager to help Editors better identify which submissions may be the best "fit" for the publication. A publication must first have a valid account with Metaᵃ. Editorial Manager will display the results from Metaᵃ to Roles with permissions
	
	How configured: *PolicyManager* has a several settings to enable Bibliometric Intelligence:
	  • "Configure Bibliometric Intelligence" sets color coding for different ranges of results.
	  • "Edit Article Types" has a set of checkboxes to set the trigger points to send the submission to Metaᵃ.
	  • "Define Details Layouts" has a new checkbox for "Bibliometric Intelligence Results."
	In addition, *RoleManager* has two checkboxes to allow users to Initiate Bibliometric Intelligence Analysis and/or View Bibliometric Intelligence Results for Editors and Publishers.
	
	PLEASE NOTE: There is a fee associated with the use of Metaᵃ. The feature can only be activated after an additional agreement with Aries has been reached with the publisher. Please contact your Aries Account Coordinator for more information.
	
	Time to configure: About 15 minutes

Custom Metadata IDs for Article Types	Publications may define Custom Metadata IDs for Article Types, so that internal and external systems can match Article Types that have slightly differing names for essentially the same Article Type. Publications can also pre-define sets of Custom Metadata IDs, and all Custom Metadata IDs are now assigned to a "type"; for example, Article Type, Additional Manuscript Details (AMD), and Custom Questions.
	
	How configured: All configurations for this feature are in *PolicyManager.* First, choose the Define Custom Metadata IDs page under General Policies. Then associate the Custom Metadata IDs with one or more of the following types.
	  1. "Edit Article Types" page, Select Custom Metadata ID
	  2. "Add/Edit Additional Manuscript Detail Fields" page, Define Custom Metadata IDs
	  3. "Create Custom Questions" page, Define Custom Metadata IDs
	
	Time to configure: About 30 minutes

Transfer Co-Author Questionnaires	When one EM publication transfers submissions to another, responses previously provided by verified Co-Authors to the Author Questionnaire are transferred to the receiving EM site. This way the Co-Author does not have to re-enter responses on the receiving site. The Co-Author is presented with the Author Questionnaire from the receiving site, prepopulated with transferred responses. A verified Co-Author must also re-verify if the receiving EM site requires an Authenticated ORCID and the transfer did not include the Authenticated ORCID. **How configured:** No configuration is necessary.
Assign Author and Upload Author List File Changes	Editors may now Assign an Author to submit a Commentary or an Invited Submission in response to a Proposal without waiting for the Author to respond to an Invitation. Author List Files (ALFs) that are uploaded can indicate whether an uploaded author record is available for Invitation or Assignment. This is especially useful when working with book workflows and other publications where the Authors are predetermined. **How configured:** A new *RoleManager* permission under Proposals/Commentaries is available for Editors to "Assign Authors (without Invitation)". Letters can then be associated with "Author Assigned for …" Events in *ActionManager.* **Time to configure:** About 10 minutes
Custom Invited Submission Proposal Numbering	Publications may wish to assign sequential Manuscript Numbers to Invited Submissions to easily identify them as belonging to a parent Proposal. Now it is possible to set a different manuscript numbering format for these submissions. **How configured:** In *PolicyManager*, "Add/Edit Article Type" for a proposal Article Type, choose "Use Prefix + Incrementing Number entered on the "Initiate Proposal" page. Then the Editor initiating a Proposal will enter the Prefix, Starting Number, and Minimum Number of digits in Starting Number for each proposal. **Time to configure:** Less than 5 minutes

PRODUCTION TRACKING ENHANCEMENTS	

Preprint DOIs	Recently, many organizations have begun to post preprint versions of manuscripts online; these are working versions of papers that have not been refereed or reviewed yet. A publication can configure PM to automatically assign a "Preprint DOI" completely independent of the final published DOI for the submission. A submission production task triggers the Preprint DOI assignment, and can be used to transmit the submission to a preprint server. The Preprint DOI is included in submission transfers to other EM and non-EM sites.
	
	The Preprint DOI can be configured to display on the following pages in EM:
	    1. A Custom Details page
	    2. The Transmittal Form
	    3. Publish Information
	    4. Production Status Grid
	
	How configured:
	    1. For sites with Production Tracking enabled, your Aries Account Coordinator will configure the automatic assignment and publication format for Preprint DOIS.
	
	    2. A System Administrator goes to *PolicyManager,* "Configure Submission Workflows and Tasks", "Edit", "Configure Submission Workflow", "Edit" (Task Type), and checks the box "Assign Preprint DOI." In addition, the production task must use a JATS submission method, and vendors that receive the submission must be notified about a new related-article element in the XML.
	
	Time to configure: About 20 minutes

REPORTING ENHANCEMENTS	
Suppress Standard EAR Reports	System Administrators may hide the "Standard Reports" section of EAR and Cross-Publication EAR if they are not relevant to their publications. **How configured:** Go to *AdminManager,*"Configure Enterprise Analytics Reporting Menus," and de-select "Display all standard Enterprise Analytics reports for all Editor Roles." **Time to configure:** Less than 5 minutes