

Editorial Manager/ProduXion Manager
Version 16.1 Release Notification

-  Editorial Manager®
-  ProduXion Manager®
-  Commerce Manager
-  Task Manager



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General Enhancements

Batch Reassign Open Editor Assignments

When Editors leave a publication, they may still have open assignments. In previous versions of EM, there was no functionality to enable the editorial office to transfer open assignments from the departing Editor to another Editor in one batch. Reassignments had to be done for each submission individually. New in EM 16.1, multiple open assignments can be transferred in batches from one Editor to another or from one Editor to several other Editors.

Editors with appropriate existing RoleManager permissions will see a Transfer Editor Assignments button on the Search People – Update Information page for users with Editor roles. Users with Search People, Assign Editor, and Unassign Editor permissions can perform batch reassignments for other Editors. Users with Unassign Myself (and its sub-permission, Replace Editor) and Search People permissions can make batch reassignments from their own Search People – Update Information page.

Transfer Editor Assignments button on the Search People – Update Information page launches the new batch reassignment interface (Activity Details, Correspondence History, and Additional People Details now appear as links instead of buttons)

The screenshot shows the 'User Information' page for a user. At the top, there is a tab labeled 'User Information'. Below it, a blue text box explains: 'The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.' The form contains several fields: 'Default Login Role' (dropdown menu set to 'Editor'), 'Default Login Menu' (dropdown menu set to 'Editorial Menu'), 'Available as a Reviewer?' (radio buttons for 'Yes' and 'No', with 'No' selected), 'Board Member?' (radio buttons for 'Yes' and 'No', with 'No' selected), 'Forbidden as a Reviewer?' (radio buttons for 'Yes' and 'No', with 'No' selected), 'Reviewer Role *' (dropdown menu set to 'Reviewer'), 'Publisher Role *' (dropdown menu set to 'None'), and 'Editorial Role *' (dropdown menu set to 'Editor'). Below these fields is an 'Editor Description' text input field. A button labeled 'Transfer Editor Assignments' is highlighted with a yellow circle. Below the button are three blue links: 'Activity Details', 'Correspondence History', and 'Additional People Details'.

Clicking the button opens the Transfer Editor Assignments page. Information shown on this page depends on assignments associated with the Editor. The message “Feature is not available for this Editor” will appear when:

- The Editor has no assignments that are eligible for transfer.
- No other user has the same role as this Editor. (Assignments may only be transferred to an Editor with a matching role.)
- The Editor has saved one or more automated reminder reports. (Saved reports must be deleted before this Editor’s assignments may be transferred.)

If the Editor has eligible assignments and other users have the same Editor role, the assignments are displayed in a grid and may be selected for reassignment.

Grid display allows the user to select assignments for transfer to a new Editor

The screenshot shows a grid of submissions with columns: Select, Action, Manuscript Number, Author Name, Article Title, Section Category, and Current Status. A green box highlights a 'Select' popup menu that appears over the first two rows. The popup contains a 'Clear All' button and checkboxes for selecting or unselecting items. The grid data is as follows:

Select	Action	Manuscript Number	Author Name	Article Title	Section Category	Current Status
<input type="checkbox"/>	View Submission Details ▾ History	19-00026	Ariadne Author	Full Title (required) optional secondary		With Editor
<input type="checkbox"/>	View Submission Details ▾ History	19-00029	R. U. Researcher	An Article for July: Study in Summer		With Editor
<input type="checkbox"/>	View Submission Details ▾ History	SAMDEV160-D-19-00030	Michael Mountain	Heights: Observations from Far Above		With Editor
<input type="checkbox"/>	View Submission Details ▾ History	SAMDEV160-D-19-00031	Benjamin Beet	A Rather Long Title with Very Little Actual Meaning		Editor Invited

The reassigning Editor selects submissions and proceeds to the Replace Editor for Selected Submissions page. This page enables the user to choose a new Editor from a drop-down list and select letters to send to both current and new Editor.

A new Letter Family (Assign/Unassign Editor for Submission Batch) and merge field are available for use when configuring letters for use with this feature. The merge field %BATCH_EDITOR_ASSIGNMENT_MS_LIST% can be used to insert a list of the submissions selected on the grid for reassignment. Letters may be customized before sending.

Both current Editor and new Editor can receive notice of batch reassignments

The screenshot shows a form titled 'Select New Editor' with two main sections: 'Current Editor' and 'New Editor'. Each section has fields for the editor's name, a dropdown for 'Assignment Letter', a 'Customize' link, and a 'Do Not Send' checkbox.

Current Editor	Unassignment Letter	Do Not Send
Flora Fade-Away Guest Editor	Batch Editor Unassignment ▾ Customize	<input type="checkbox"/>
New Editor	Assignment Letter	Do Not Send
Lois Lane ▾	Batch Editor Reassignment ▾ Customize	<input type="checkbox"/>

Editors will receive a single email containing the list of reassignments (pulled in using the new merge field). In the system, the email will be included in the Correspondence History for each submission in order to capture the Editor reassignment for the submission. An identical copy of

the email will be stored for each submission in the Editor's Personal Correspondence History (even though the Editor received a single copy of the email).

TO CONFIGURE:

Existing **RoleManager** permissions are used to grant Editors access to this feature. Go to the Edit Role Definition page for the appropriate Editor role to review these permissions and enable as needed:

- Search People: Required (grants access to the Search People – Update Information page)
- Assign Editor: Required (allows the assignment to a new Editor)
- Unassign Other Editors: Required (allows the unassignment of the departing Editor)
- Replace Editor (a sub-permission of Unassign Myself): Optional (allows users to reassign their own assignments to a new Editor)

Configure letters to send to the new Editor and current Editor. In **PolicyManager** > Email and Letter Policies > Edit Letters, create letters using the new Letter Family, Assign/Unassign Editor for Submission Batch. The new merge field, %BATCH_EDITOR_ASSIGNMENT_MS_LIST%, is available for use only in this Letter Family. The merge field inserts the list of all the submissions selected in the batch being reassigned to a new Editor in the format:

Manuscript Number: 'Article Title' by Corresponding Author Name (Editorial Status)

Finally, configure elements of the user interface. **PolicyManager** > Editor Assignment Policies > Configure Batch Editor Assignment Pages.

Two default letters may be selected: one for the current Editor being unassigned and one for the new Editor being assigned. Use the drop-down menus to select default letters. (The menus display only letters configured in the Assign/Unassign Editor for Submission Batch family.)

Custom instructions may be displayed on the Replace Editor for Selected Submissions page. Use the Instructions text box to edit existing instructions or enter new instructions.

Merge Fields for Additional Manuscript Details

Publications often create Additional Manuscript Detail (AMD) fields to capture information related to submissions. Previously in EM, if Editors or editorial staff wanted to share this information, they had to copy text from an AMD field and paste it into an email. In EM 16.1, a new type of merge field is introduced. These AMD merge fields are similar to custom merge fields. They can be created by a publication to capture the description of an AMD and the entered value.

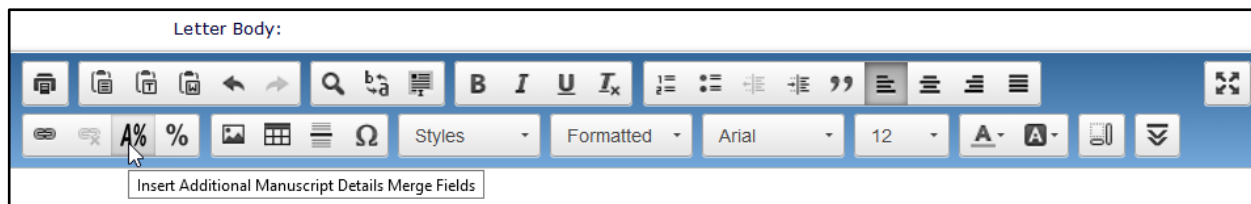
The merge field names are formatted using the merge label of the associated AMD:

- %AMD_label_DESC% pulls in the Field Description (as entered on the Add/Edit Additional Manuscript Detail Field page).
- %AMD_label_VALUE% pulls in the value for the AMD as entered in the user interface.

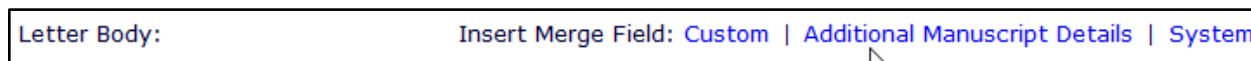
AMD merge fields can be used in all emails associated with a submission. They can be inserted into letter templates for all Letter Families with the exception of Batch Email. The tools for adding AMD merge fields function the same way as those for inserting system or custom merge fields. An icon (for HTML letters) or a link (for plain text letters) opens an overlay that displays all configured AMD merge fields.

Letter pages may display the option to insert AMD merge fields into the letter body:

- An icon appears in the formatting toolbar for HTML letters



- A link appears for text letters



The merge fields also can be added to customized letters. When a value is present, the merge fields are populated in Preview, so the sender can view them in the context of the letter. However, they are not populated on the Customize Letter page or Open in New Window page, so that users cannot change the content of the merge fields defined by the publication.

When a letter is resent from Correspondence History, any AMD merge fields that were included in the letter are not remerged. The information that was sent in the letter is displayed as the text that was originally sent. Any changes to the AMD merge field since the letter was originally sent have no effect on the letter content.

AMD merge fields may be edited at any time by a system administrator. Edits will affect only letters sent after the edits were submitted.

TO CONFIGURE:

PolicyManager > Additional Data Policies > Add/Edit Additional Manuscript Detail Fields.
Add a new AMD or edit an existing one.

A new Merge Fields section is added to the configuration grid on the Add (or Edit) Additional Manuscript Detail Field page. Enter text for the merge field label; each AMD label must be unique (this label is used to create the AMD's two merge fields). Ensure that the Hide box is unchecked (so merge fields will appear in the list of AMD merge fields). Help text entered in this text box is displayed in the Insert Additional Manuscript Details Merge Field overlay.

Detail of Add Additional Manuscript Detail Field page

Once AMD merge fields are defined, they appear in the master list on the Add/Edit Additional Manuscript Detail Fields page.

Merge Fields are included in the master list of AMDs displayed on the Add/Edit Additional Manuscript Detail Fields page

Add/Edit Additional Manuscript Detail Fields

Listed below are the Additional Manuscript Detail Fields added for your journal. The values for these fields are entered manually on the Additional Manuscript Details page or the Transmittal Form, or can also be added to Custom Details Page layouts. If a Custom Flag has been configured to be Associated with an Additional Manuscript Detail field, an option to turn that Flag on or off will also appear next to the field.

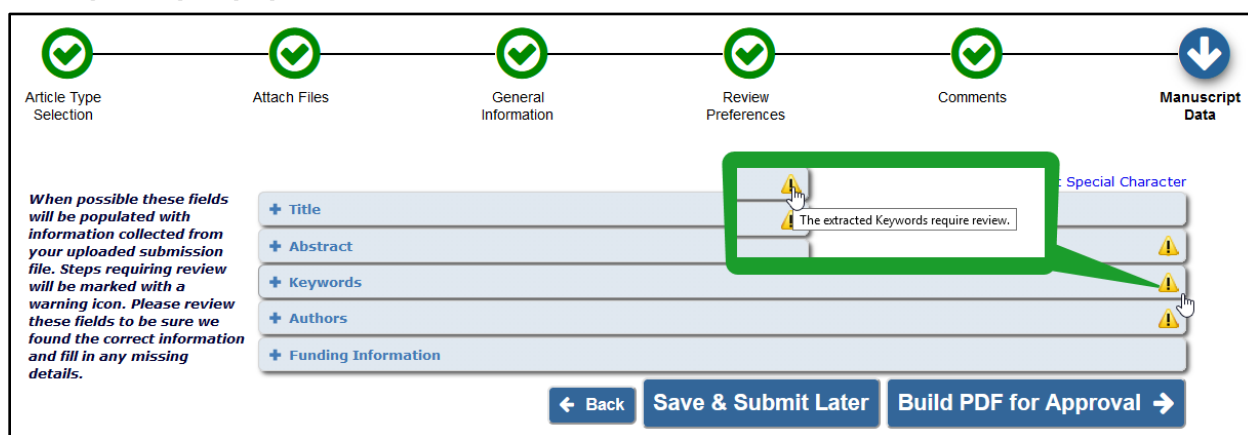
Order	Description	Merge Fields	Associated with Flag	Actions
<input type="text" value="1"/>	Offline Materials Received	%AMD_OFFLINE_MATERIALS_DESC% %AMD_OFFLINE_MATERIALS_VALUE%		Remove Edit

Keywords Automatically Populated During Author Submission

In EM 14.1, the redesigned Author Submission Interface introduced automatic extraction of metadata (Full Title, Abstract, and Author List) during the submission process. New in EM 16.1, Keyword metadata will also be extracted during Author submission for both new and revised submissions.

Previously, the Keywords field was displayed at the General Information submission step. The Keywords field will now be presented as part of the Manuscript Data submission step for any Article Types configured to display the Keywords field (as either Optional or Required). Manuscript Data is the final submission step, where the Title, Abstract, and Author fields are also displayed. As with these fields, the Author may update the Keyword values in the user interface before completing the submission process.

Keywords field now displays on the Manuscript Data submission step, and the system attempts to pre-populate the field with extracted metadata



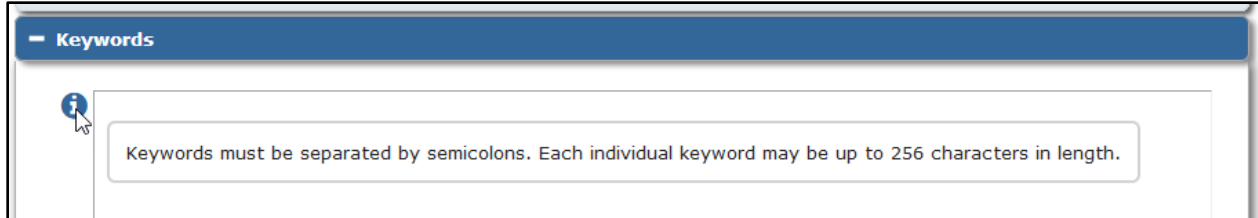
As with the other fields, the Keywords title bar will display icons, either red or yellow, to alert users as necessary. The yellow alert icon will appear when the field has been auto-populated with extracted metadata that meets the configured requirements. The yellow icon prompts the user to expand the accordion item in order to view the information. The icon displays the hover text, “The extracted Keywords require review.”

The red alert icon appears on the Keywords title bar when Keywords are configured as required for the Article Type and no Keywords have been entered in the field or the entered Keywords do not meet the configured requirements. The red icon displays the hover text, “Please provide all required information and make any necessary corrections.” This alert may appear under the following conditions:

- Keywords are required, but no keywords were auto-populated into the field during the extraction process.
- Keywords are required and were auto-populated, but the Author removed them, OR the Author overrode the metadata extraction process by clicking the Enter Data Manually button.
- Keywords were auto-populated but exceed the configured maximum number.
- Primary Keywords were auto-populated, but Secondary Keywords are also required. (Secondary Keywords are not automatically populated under this new functionality but must meet the configured requirements).

A publication's existing Article Type configurations for Keywords are carried over to the new display of the Keywords field. Custom instructions are retained and displayed as configured (either as text above the field's entry box or as rollover text with the information icon).

Existing configurations related to display and appearance of Keywords field are carried over to its new position in the submission interface



TO CONFIGURE:

No new configuration is required.

Existing configurations are carried over to the new display of the Keywords field. Article Type configurations related to the Keywords field during the submission process (Hidden, Optional, Required) are retained. Custom instructions related to the Keywords field (as entered in **PolicyManager** > Submission Policies > Edit Manuscript Submission Instructions) are retained and displayed as configured.

Assign DOIs to Individual Submission Items

The Digital Object Identifier (DOI) system is an international standard of the publishing industry. DOIs are used to uniquely identify content and to provide a persistent link to an item's location on the Internet. Usually, a publisher assigns a DOI to an item (often an article) and registers the DOI when the final version of the article is published and made available electronically.

In previous versions of EM, publications could assign DOIs only to the submission as a whole (i.e., the main submission file). New in EM version 16.1, DOIs can also be assigned to Submission Items, for example, figures and supplementary materials provided as separate files during the submission process.

Automatic assignment of a Submission Item DOI is dependent on the related Submission DOI. A Submission Item DOI is assigned at the same time as the Submission DOI and uses the next number in the DOI sequence. (Automatic DOI assignment may be configured to take place either when the Author is notified of an Accept decision or when production is initiated.) The format of the Submission Item DOI follows the rules defined for the Submission DOI.

Companion files uploaded after the Submission DOI has been assigned will automatically be assigned their Submission Item DOI at upload (when the user clicks the Proceed button on the Upload Companion Files page).

If a production task import adds a file configured for Submission Item DOI assignment after assignment of the Submission DOI, the Submission Item DOI will automatically be assigned. If the file imported by the production task replaces an existing file that has already been assigned a Submission Item DOI, the DOI is retained by the imported file.

The File Inventory page displays a Submission Item DOI column for each file. Once a Submission Item DOI has been assigned to the file, it will appear in the column. Users with permission see a Replace link for uploaded files. If a Submission Item DOI exists for the file and the user replaces the file, the new file retains the DOI.

File Inventory displays Submission Item DOI column; Editors with permission may edit the Submission Item DOI

The screenshot shows the 'File Inventory' page for Manuscript Number SAMDEV161-D-19-00038, specifically for the author 'UNITED STATES' under the heading 'Testing DOIs'. The page lists files included in the current version of the latest Revision of the submission. A table of 'Companion Files' is visible, with columns for Action, Color, Item, Submission Item DOI, and Display On TF. An 'EDIT DATA' modal is open for a 'Figure' item, showing fields for Description, File Name (sample_image.png), Submission Item DOI (00.0000/samdev.101), and Figure Number (1). The 'Submission Item DOI' field is highlighted with a yellow box, and an orange arrow points to it from the table. The 'Display On TF' checkbox is checked.

Action	Color	Item	Submission Item DOI	Display On TF
<input type="checkbox"/>		Figure	00.0000/samdev.101	<input checked="" type="checkbox"/>

Editor roles may be given permission to edit Submission Item DOIs.

All existing JATS Editorial Transmittal and Production Task Export methods are enhanced to include any assigned Submission Item DOIs. (Non-JATS Export Transmittal methods and all Import methods are not changed by this enhancement.)

TO CONFIGURE:

To enable this feature, contact your Aries Account Coordinator.

A Submission Item DOI will be automatically assigned at the same time as the Submission DOI. Submission DOIs must be configured for automatic assignment (existing functionality).

PolicyManager > ProduXion Manager > Configure Automatic DOI Assignment and select the event at which automatic DOI assignment will take place.

Configure Submission Items to be assigned DOIs. **PolicyManager** > Submission Policies > Edit Submission Items. On the Edit Submission Item Type page (for any item to be assigned a DOI), check the box next to the new setting, Assign Submission Item DOI.



The screenshot shows a web form titled "Edit Submission Item Type". At the top right, there is a link "Insert Special Character". Below it, the "Item Type" field contains the text "Figure" and has a note "Maximum 256 characters" to its right. The "Item Type Family" dropdown menu is also set to "Figure". At the bottom left, there is a checkbox labeled "Assign Submission Item DOI" which is checked. A mouse cursor is pointing at the checkbox.

A new **RoleManager** permission allow Editors to edit Submission Item DOIs. Enable the permission as applicable for each Editor role. (For more on editing automatically assigned DOIs, see the next page.)

Edit Automatically Assigned DOIs

In previous versions of EM, Digital Object Identifiers (DOIs) could be configured for either manual or automatic assignment. DOIs assigned automatically by the system could not be edited.

New in EM 16.1, RoleManager permissions allow Editors to edit automatically assigned DOIs. Three separate permissions allow Editors to edit Submission DOIs, the new Submission Item DOIs (see page 19 for details), and Preprint DOIs.

Editor roles with associated permission see an Edit link next to automatically assigned Submission DOIs, Submission Item DOIs, and Preprint DOIs

Manuscript Number:	SAMDEV161 D 19 88835
DOI:	00.0000/samdev/SAMDE [Edit]
Full Title:	Testing: Sub Item DOI

Automatically assigned Submission DOIs appear in the field as grayed out text. An Editor with the associated permission will see an [Edit](#) link next to the field. Clicking the link makes the DOI display as editable text.

Automatically assigned Submission Item DOIs may be edited only on the Edit Data pop-up window. The popup is accessible to Editors with the associated permission via an [Edit Data](#) link on the File Inventory page and the Upload Companion Files page.

Automatically assigned Preprint DOIs appear in the field as grayed out text. An Editor with the associated permission will see an [Edit](#) link next to the field. Clicking the link makes the DOI display as editable text.

TO CONFIGURE:

Go to **RoleManager** > Editor Roles. Enable any or all of the three new permissions as applicable for an Editor role:

- Edit Submission DOI Automatic Assignment
- Edit Submission Item DOI Automatic Assignment
- Edit Preprint DOI Automatic Assignment

Deep Links Disabled in Emails to Users with Other Preferred Method of Contact

With the implementation of General Data Protection Regulation (GDPR) and increased user concerns regarding account security, EM continues to introduce enhancements to personal data security.

Some users may select a means other than email as their preferred method of contact (phone, fax, etc.). For these users, system correspondence is sent to an email address designated in PolicyManager, and the handler managing that email is expected to contact the user via the preferred method. In previous versions of EM, if the email correspondence included deep links, the handler could use a deep link to log in and access the user account of the intended recipient.

New in EM 16.1, all deep links will be blinded in letters addressed to users that have a preferred method of contact set to anything other than email. The handler will not be able to access the intended recipient's account via deep links.

TO CONFIGURE:

No configuration is required.

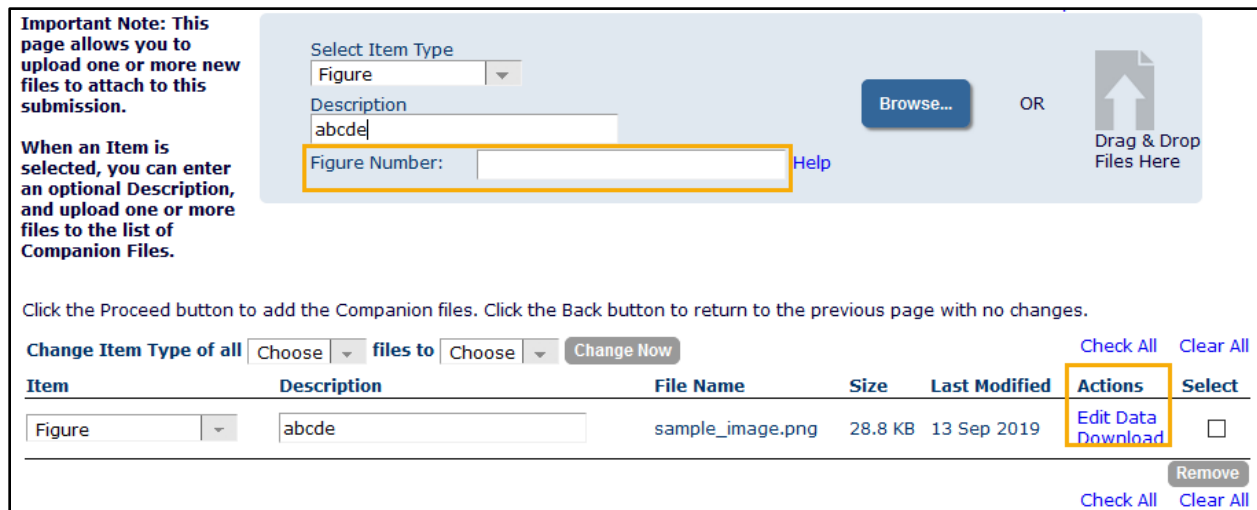
Item Type Metadata Can Be Applied to Companion Files

In previous versions of EM/PM, publication-defined metadata fields could be assigned to **submission files** (as configured by Submission Item Types) in order to pass information about the files to the production department or automated production system. An [Edit Data](#) link enabled Authors and Editors to edit the data on the Attach Files step of the submission process.

New in EM/PM 16.1, item type metadata can also be assigned to **companion files** (i.e., files that are not built into the submission PDF). Companion files may be uploaded by the Author during submission or by an Editor (publication staff) or Publisher (production staff) later in the process.

For example, an Item Type Metadata field may be defined and used to store a figure number value for uploaded figure files. The field may be made available in the interface for a user to enter or edit the value. If so, Editors will see the editable field on the Upload Companion Files page and in an Edit Data pop-up window. The field may also be set to display to Authors in the submission interface; Authors will see the editable field and the Edit Data link on the Attach Files step of the submission process.


An Item Metadata field (e.g., Figure Number) appears as an editable text box on the Upload Companion Files page; this page also displays Edit Data links for uploaded files with associated configured Item Type Metadata



Important Note: This page allows you to upload one or more new files to attach to this submission.

When an Item is selected, you can enter an optional Description, and upload one or more files to the list of Companion Files.

Select Item Type: Figure
Description: abcde
Figure Number: [Help](#)

[Browse...](#) OR 

Click the Proceed button to add the Companion files. Click the Back button to return to the previous page with no changes.

Change Item Type of all files to

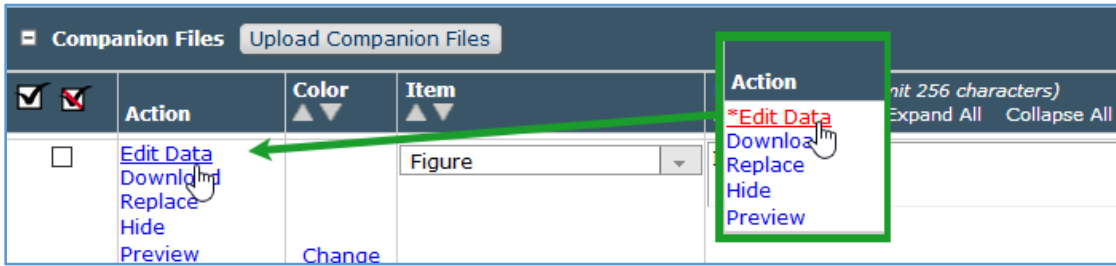
Item	Description	File Name	Size	Last Modified	Actions	Select
Figure	abcde	sample_image.png	28.8 KB	13 Sep 2019	Edit Data Download	<input type="checkbox"/>

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

The Edit Data link for companion files appears for Editors on both the Upload Companion Files page and the File Inventory page. If the metadata is configured as Required, then the link shows as red and is marked with a red asterisk.

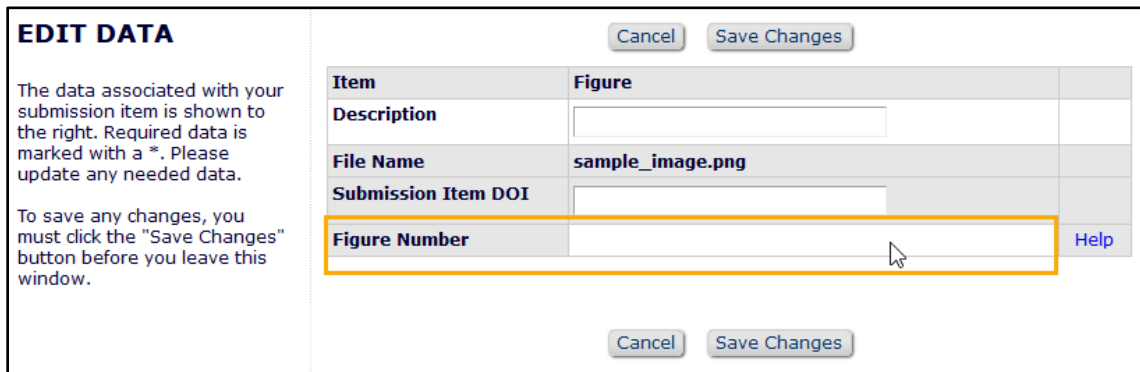
The File Inventory page is also enhanced to display the Edit Data link for submission files with associated configured metadata fields.

Edit Data link appears on the File Inventory page and the Upload Companion Files page; if metadata is configured as Required, the link is red and marked with an asterisk



The Edit Data link opens a pop-up window where the user can edit the metadata. The pop-up window displays the companion file's Item Type, Description, File Name, Submission Item DOI (if used), and Item Type Metadata. Required fields are marked with an asterisk. A Help link (displayed wherever the editable field appears) provides access to publication-customized instructions.

Edit Data popup includes an editable field for Item Type Metadata (e.g., Figure Number)



Article Type configuration allows Authors to enter and edit Item Type Metadata fields during submission

Article Type Selection **Attach Files** General Information Review Preferences Additional Information Comments Manuscript Data

✓ Manuscript
Please provide any additional items.

Select Item Type
Figure
Description
Figure
Figure Number:
1

Insert Special Character
Browse... OR Drag & Drop Files Here

Help
Delivery Method
Online

The order in which the attached items appear in the submission is determined by the order in which they are added. You can change the order of any items of the same type manually if necessary.

Change Item Type of all Choose

Clear All

Order	Item	Description	File Name	Size	Modified	Actions	Select
1	*Manuscript	Manuscript	Boo_samplemss.docx	12.1 KB	02 Aug 2019	Download	<input type="checkbox"/>
2	Figure	Figure	sample_image.png	28.8 KB	13 Sep 2019	Edit Data Download	<input type="checkbox"/>

Update File Order Remove Check All Clear All

← Back Proceed →

TO CONFIGURE:

Editor roles will be allowed to edit Item Type Metadata if they have the existing **RoleManager** permission Upload, Hide and Restore Companion Files.

PolicyManager > Transmittal Policies > Add/Edit Submission Item Metadata. These pages are enhanced to allow metadata fields to be displayed on the Upload Companion Files page and on the File Inventory. Fields may be configured as Hidden, Editable, or Required.

The metadata fields may also be configured to display in the Author submission interface.

PolicyManager > Submission Policies > Edit Article Types. On the Edit Article Type page, the Submission Item Parameters section displays any defined Item Metadata fields for each Submission Item. Use the drop-down menus (for new and revised submission) to select Required, Optional, or Hidden.

Note: Companion file metadata are not yet included in the Transmittal Form or transmitted metadata.

Create File References and Rename Files via File Inventory

Publications often use naming conventions to identify the files related to a submission or to convey what a file is to be used for. In EM/PM, the file name provided at upload is the name the file retained as the submission progresses through processing. In previous versions of EM/PM, if the name of the file at upload was incorrect, then publication staff had to download, rename, and re-upload the file (because file names cannot be changed within the system).

New in version 16.1, a File Reference field is added to the File Inventory page to provide an easier way for publication staff to rename files for organization, download, and transmittal. The File Reference field allows a new name to be applied to the downloaded or transmitted file while leaving the file's original name (at upload) unchanged in the system. The File Reference feature will be available for use in both EM and PM, and the File Reference field will be available for all files visible in the File Inventory (submission and companion files).

This feature has two intended purposes:

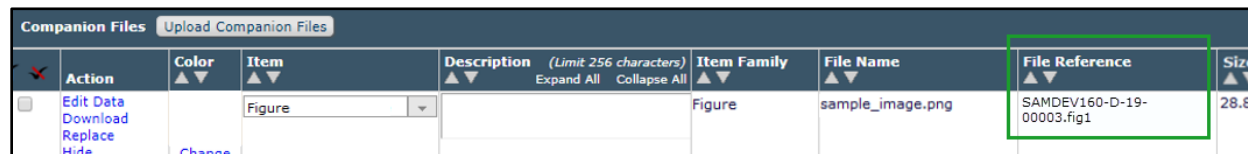
- To give related files the same, or similar references; for example, multiple files relating to the same image (such as, for online and print use).
- To allow users to rename files to a specific format; for example, including the manuscript number in the file name. The file reference provides the main body of the new file name, which is applied when the file is downloaded or transmitted to another system.

Define file reference

A Define File References page is accessible from the File Inventory page. Once a reference is entered in this field, it may be used to rename the file for download or transmittal. The system will rename the file correctly at download or transmittal (for tasks configured to rename assignment files), or upon request when downloaded by an Editor with the applicable RoleManager permission (see below).

A new RoleManager permission for Editor and Publisher roles allows users to View File References. Users with this permission will see the read-only File Reference field. Sub-permissions further enable users to edit the File Reference field and to choose to rename files on download based on defined file references.

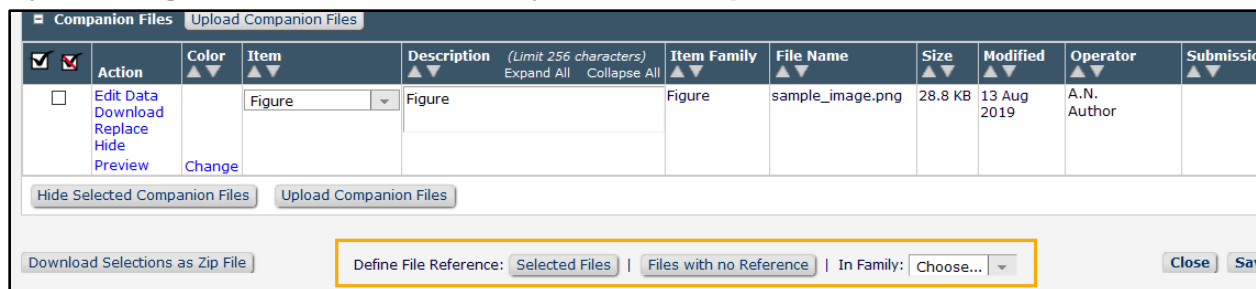
Detail of File Inventory page: After a reference is defined, a File Reference column is displayed on the File Inventory page (for users with permission to View File References)



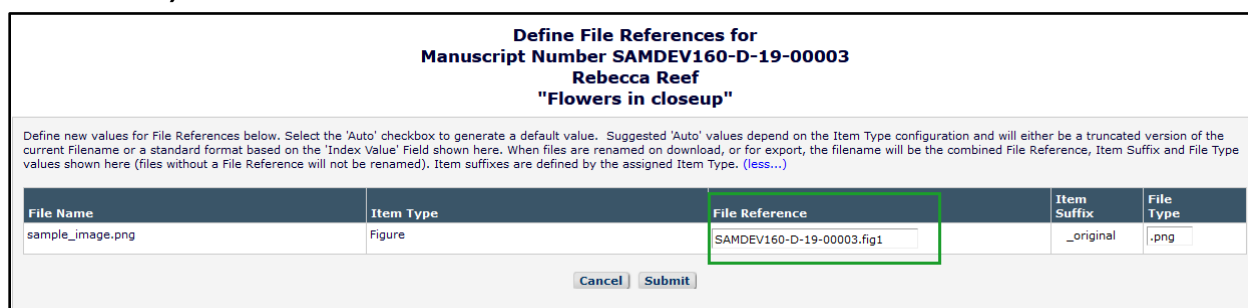
Action	Color	Item	Description <small>(Limit 256 characters)</small>	Item Family	File Name	File Reference	Size
Edit Data Download Replace Hide	Change	Figure		Figure	sample_image.png	SAMDEV160-D-19-00003.fig1	28.8

Users with permission to Edit File References see a Define File Reference portion of the File Inventory page with two buttons (Selected Files, Files with no Reference) and a drop-down list (In Family). An Editor or Publisher with Edit File References permission may use any of the three options to select files and open the Define File References pop-up window, which displays the selected files.

Detail of File Inventory page: Buttons allow users with permission to open the Define File References page for files selected from the inventory, for all files with no references, or by selecting a Submission Item Family from the drop-down list



A Define File References pop-up window allows users (with permission to Edit File References) to enter text in the File Reference field



The system may be configured to automatically suggest File Reference values. When this option is enabled, a checked box is displayed in the Auto column for any file without an existing File Reference value on the Define File References popup, and the suggested value automatically appears in the File Reference field. Rules may be configured to truncate the file name (i.e., remove the format extension and File Use Suffix) or to suggest a value in EM XML Format when automatically suggesting the value.

In addition, if the same File Reference is to be used to identify multiple versions of the same file (e.g., different resolutions of a document image), publications can differentiate these versions in EM by defining and applying different Submission Item Types. A new setting allows a system administrator to enter a File Use Suffix to be associated with the Item Type. This suffix will be appended to the new file names created using the File Reference. (See the Item Suffix column in the Define File References illustration above.) For example, “_original” might be the suffix for Item Types used for Author uploads, and “_final” for Item Types indicating processed artwork files.

Rename file for download or transmittal

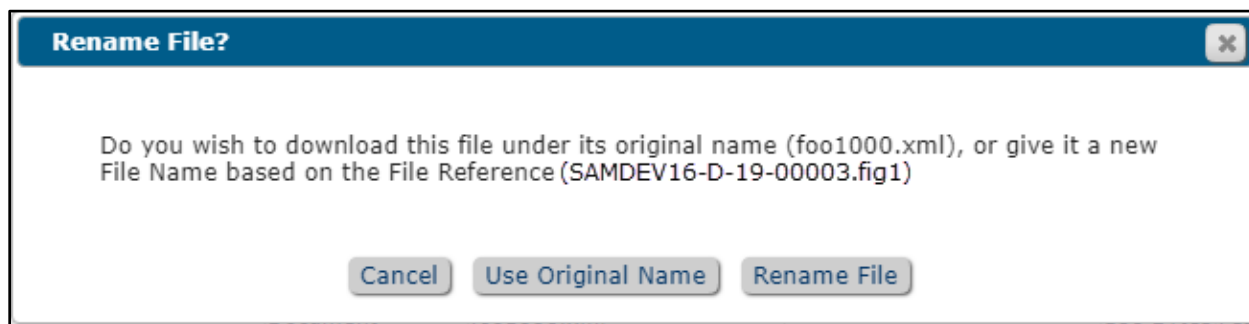
The system applies a new name by adding together the File Reference field (no file extension included) and Item Suffix field (if configured) plus the File Type field (this is the file format extension that EM/PM identifies in the original file when it is uploaded). The File Type field is editable; this is helpful when a specific suffix for some file types (e.g., .tif/.tiff or .jpg/.jpeg) is required.

For example, in the image above, the original name of the file at upload was **sample_image.png**. The file reference has been defined as **SAMDEV160-D-19-00003.fig1**. The item suffix defined for the Submission Item Type is **_original**. Using information from these three components, the file is renamed: **SAMDEV160-D-19-00003.fig1_original.png**.

If an Item Suffix had not been configured for the Item Type, the file would be renamed:
SAMDEV160-D-19-00003.fig1.png.

Users with the new RoleManager permission, Rename Files on Download (based on File Reference), see a pop-up window after clicking the Download link for a file with a defined File Reference (or after selecting a group of files to download as a ZIP file). This popup gives the user the option to download the file with its original name or with a name created using the defined File Reference. Users with the same permission will see similar messages on downloading files from the Assignment Files page for a Submission or Schedule Group production task assigned to them.

Rename File pop-up window gives users (with permission) the option to use a defined File Reference to rename the file being downloaded



Automatically rename file for download or transmittal

For publications using Task Manager or ProduXion Manager, task types can be configured to rename files by default. When this setting is enabled the system will automatically rename any assignment files included in the ZIP file created for transmittal by SFTP. In addition, the new names will be applied automatically to assignment files downloaded by the task assignee, unless the assignee has the new RoleManager permission related to renaming files. Users with the new RoleManager permission will be asked if they want to rename the files. For details on task configuration, see page 30.

To Configure:

New **RoleManager** permissions are available for Editor and Publisher roles to enable users to work with file references. View File References is a sub-permission of the existing permission, Download Source Files. This new permission has two additional sub-permissions:

- View File References: Enables the user to see the File Reference field.
 - Edit File References: Enables the user to edit the value of the File Reference field.
 - Rename Files on Download (based on File Reference): Enables the user to choose to rename files based on the File Reference field value when downloading.

A new section is added to the Add/Edit Submission Item Type page (**PolicyManager** > Submission Policies > Edit Submission Items > Add/Edit Submission Item Type). This section allows the system administrator to:

1. Configure the system to automatically suggest File Reference values. Two options are available (select the applicable radio button):
 - Truncate file names: This removes any file format extension and File Use Suffix.

- Suggest EM XML Format: This formats the File Reference value based on the chosen elements: Source Identifier + Content Label + Number Metadata Field (Figure or Table). See Note below.
2. Define a suffix to be applied to files with the corresponding Submission Item Type; the suffix is applied when processing file names using the File Reference feature. Once a suffix has been entered in the text box, the system displays an example of how files will be renamed.

Detail of Edit Submission Item Type page: A new section, File Reference and File Name Generation, is added to enable configurations for this feature

File Reference and File Name Generation

The File Reference field associated with a file is used to associate related files, or as a basis for renaming files for download, transmittal or export (by using an appropriate Transmittal Method). You may give Editor and Publisher Roles the permission to view or edit File Reference values via Role Manager, and they access these from the File Inventory.

An option to automatically generate a suggested File Reference will be available. Enable the 'Suggest EM XML Format File References' option to have the System generate a File Reference value conforming to the format used by Editorial Manager's full-text XML functionality (otherwise the suggested File Reference will be a truncation of the Filename). You must select a specific prefix value related to the type of file, and an existing, text-format Item Type Metadata field. This Metadata Field should be one that is used to collect an 'Index Value' or 'Figure Number' - i.e. the number, letter or set of numbers/letters that matches the 'number' part of the associated caption in their Word document (e.g. "1" in "Figure 1"; "1a-1d" in "Schemas 1a-1d" or "F" in "Plate F").

'Auto' Suggest File Reference values 1

Truncate Filenames (remove Format Extension and 'File Use Suffix')

Suggest EM XML Format File References

Source Identifier	Content Label	'Number' Metadata Field	Example
samdev161_[MS ID].	Figure (= 'fig')	Figure Number	Example: samdev161_SAMDEV161-D-19-00042.fig1

Some transmittal, export or download methods will automatically rename files using the File Reference as the basis of the new file name. If you use the same File Reference to identify multiple versions of the same document image, you should differentiate these in EM by applying different Item Types and define different suffix values here to be included in the new file name for each Item Type. This will also be used when truncating the Filename to generate a suggested File Reference, where applicable.

Apply 'File Use Suffix' when processing Filenames 2

Suffix: Example: MyFileReference_original.tiff

Note: In order to use the EM XML Format for file names, an Item Type metadata field must be configured to hold the index value used to apply a number to the file name (e.g., .fig1). This is existing functionality for Item Type Metadata, which is now available for Companion files (for a full description, see page 12). In summary:

1. PolicyManager > Add/Edit Submission Item Metadata: Define a field, e.g., Number or Figure Number, and configure the locations where it appears.
2. PolicyManager > Edit Submission Item Family Metadata: Make this field available for use with the correct family, or families (e.g., associate a Figure Number field with the Figure family).
3. PolicyManager > Edit Article Types: Configure this Item Type Metadata to be collected from Authors when they are submitting their files.

Additional Manuscript Detail Fields Can Be Included on Notify Author Page

In previous versions of EM, Additional Manuscript Detail (AMD) fields could be configured to display on several pages in the system to users with Editor roles with applicable RoleManager permissions. These pages include the AMD pop-up window, Manuscript Details pages, and Transmittal Form pages. Editors had to navigate to one of these pages to view or edit the AMD.

New in EM 16.1, AMD fields may also be configured to display to Editors on the Notify Author page. This will enable Editors with permission to view and set AMD values during the Editor decision workflow without having to access the submission's Transmittal Form or Details page. In addition, the display of an AMD field on the Notify Author page may be configured by decision family.

In workflows where an Editor can draft and save a decision letter to be sent by another Editor or by publication staff, an AMD value entered by the first Editor is retained once the letter is saved. The AMD field is displayed for both Editors (as long as both have the applicable RoleManager permission).

Detail of Notify Author page: AMDs configured (by Decision Family) to appear on this page are displayed below the letter body text box

The screenshot shows a web interface for writing a letter. At the top, there is a "Letter Body:" label and an "Open in New Window" button. Below this is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough), alignment, bulleted and numbered lists, indentation, link, unlink, insert table, insert image, and insert link. Below the toolbar are dropdown menus for "Styles" (set to "Normal"), "Font", and "Size", along with font color and background color pickers. The main text area contains the following text: "Dear %TITLE% %FIRST_NAME% %LAST_NAME%,
I am pleased to tell you that your work has now been accepted for publication.
It was accepted on %FINAL_EDITOR_DECISION_DATE%
Comments from the Editor and Reviewers can be found below." Below the text area is a "body p" label. At the bottom of the page, there is a section titled "Additional Manuscript Details" which contains a warning message: "The following Additional Manuscript Details are configured for this decision term. Any Additional Manuscript Detail that is marked required, and that does not currently have a value, will display a red error triangle (⚠). This Additional Manuscript Detail must have a value before the button 'Send Now' is clicked. If you are not sending the letter now, the decision can be saved or submitted and the value can be entered at a later time." Below this message is a form field labeled "Offline Materials Received" with an empty input box.

TO CONFIGURE:

Go to **PolicyManager** > Additional Data Policies > Add/Edit Additional Manuscript Detail Fields. Add a new field or edit an existing field.

A new section has been added to the configurations grid on the Add/Edit Additional Manuscript Detail Field page to set parameters for displaying the AMD on the Notify Author page. As with other page settings, three AMD field display options are available: Hide, Editable, Required. In addition, AMD field display can be limited by Decision Family; the AMD will display on the Notify Author page only when an Editor selects a decision in one of the configured Decision Families. Use the multi-selector box to choose one or more Decision Families.

Detail of Add/Edit Additional Manuscript Detail Field page, showing new configuration section for AMD display on Notify Author page

Page	Hide	Editable	Required	Help Text
portion of page removed				
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Notify Author		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		Show for Decision Families: <ul style="list-style-type: none">AcceptRejectReviseReject and Transfer	<ul style="list-style-type: none">SelectAllClearAll	

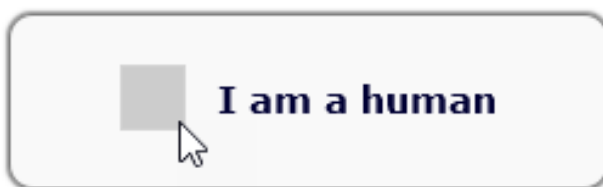
CAPTCHA to Shield Deep Links from Email Security Systems

Some email security systems analyze URLs in the body of email messages, automatically clicking them in incoming emails. In previous versions of EM, users sometimes discovered that invitations had already been accepted or declined before they had actually opened an email from a publication, because their security system had clicked the deep link in the invitation.

New in EM 16.1, a CAPTCHA landing page may be configured to shield deep links from email security system that click the links on a user's behalf. The CAPTCHA landing page requires a response from a human user before the Accept or Decline actions of the email deep links are completed in EM. When the feature is enabled, users are redirected to the CAPTCHA landing page when clicking an EM deep link that triggers an action in the system.

Once the user checks the box presented on the CAPTCHA landing page, the system processes the response action and proceeds to the confirmation page.

The CAPTCHA landing page requires human interaction to verify the response action after the user clicks the email deep link; then the system confirms the action



Deep-linking merge fields related to Editor invitation, Author invitation, Reviewer invitation, cross-publication transfer, and Co-author verification require partial login and are affected by the automatic email security system click. These deep links will redirect to the CAPTCHA landing page when the feature is enabled:

- %ACCEPT_EDITOR_INVITATION%
- %ACCEPT_INVITATION%
- %VIEW_SUBMISSION%
- %ACCEPT_REVIEW_INVITATION%
- %ACCEPT_REVIEW_INVITATION_AND_VIEW_REVIEWER_PDF%
- %DECLINE_TO_TRANSFER%
- %OTHERAUTH_DECLINE_DEEP_LINK%
- %OTHERAUTH_VERIFY_DEEP_LINK%

TO CONFIGURE:

The new CAPTCHA setting is added to AdminManager. Go to **AdminManager** > Configure CAPTCHA to Shield Deep Links from Email Security Systems. Check the box next to the setting, Enable CAPTCHA to shield deep links from email security systems, and click Submit.

Publication Charges Processing Enhancements

Several enhancements in EM 16.1 enable publications more flexibility when using the Publication Charges Processing feature for Open Access (OA) publishing options.

API enhancements

In previous versions of EM, publications could interact with an external payment system at certain points in the workflow to handle three types of notification: charge estimate, payment due, and payment complete. During the submission process, EM sends metadata via API to the external payment system, which determines an estimate of the Article Processing Charge (APC); the Author may view the estimate by clicking the View Publication Charges link. Later in the workflow, a second event (Notify Author, Set Final Disposition to Accept, or a submission production task) triggers an API call to inform the external payment system that it is time to collect the charges or otherwise close the transaction. Finally, the external payment system notifies EM via API when the Author payment has been completed. Publications could also configure EM to send updates to the payment system when certain events occur in EM (e.g., an Author declines to revise an OA manuscript or the submission is rejected).

New in EM 16.1, an additional API call is added to this process. If configured, this new update API call will be triggered whenever an Author or Editor clicks Build PDF for Approval for a revised manuscript, so that the external payment system can receive the updated submission metadata and potentially provide a different estimate of charges. In addition, publications may now select from the list of events that trigger EM to send updates to the payment system.

New RoleManager permission

A new RoleManager permission is added to allow a user with an Editor or Publisher role who is editing a submission to view the APC estimate. This permission also allows an Editor (with Proxy for Authors permission) to click the Action links, View Publication Charges and Pay Publication Charges, while operating in proxy mode for an Author who has submitted an APC article.

Customize Author-facing text

Publications will be able to customize more of the text displayed to Authors on the Publication Charges page. In addition to being able to customize instructional text and questions (existing functionality), publications may now customize the text to display as the Publication Charges page heading, text displayed when an Author agrees or declines to submit the manuscript as an OA submission, and publication charge links in Author folders (as well as Editor and Publisher folders).

TO CONFIGURE:

The Publication Charges Processing feature must be enabled by your Aries Account Coordinator.

Go to **PolicyManager** > Submission Policies > Configure Publication Charges Processing. New settings appear on this page. (They are described by section from top to bottom.)

Select an Editorial Event to Trigger the Publication Charges Payment Due Event: Previously, the option “None (Publication Charges Payment Due must be triggered by assigning a Task)” was available only to publications using production tracking or Task Manager. Now, publications using EM only may select this option if they do not want to trigger the payment due event during the editorial workflow.

Detail of Configure Publication Charges Processing page: Select an Editorial Event to Trigger the Publication Charges Due Event

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

Notify Author of selected decision(s):

Please select Decision Term(s) ^
 Accept
 Minor Revision
 Major Revision
 Accept with Minor Revisions v

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

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

Notify the Payment System: A link, Select Update Events, is added to this section. The Select Update Events page lists the workflow events that may be selected to trigger the new Update Manuscript API call. Use the checkboxes to select events. (At upgrade, if the Notify the Payment checkbox is selected, all workflow events will be checked except the new item, Author clicks Build PDF for Approval for a revised submission.)

Detail of Configure Publication Charges Processing page: Notify the Payment System

Notify the Payment System

Select this checkbox to notify the payment system of changes in status that will result in Publication Charges not being paid.

Notify the Payment System
 [Select Update Events](#)

Select Publication Charges Update Events page

Select Publication Charges Update Events

Use this page to select the workflow events that will cause EM to send an update to the Publication Charges system

Workflow Events	Select
Author clicks [Build PDF for Approval] for an original submission	<input checked="" type="checkbox"/>
Author clicks [Build PDF for Approval] for a revised submission	<input type="checkbox"/>
Author clicks 'Approve Submission' or 'Approve Revision' Action Link	<input type="checkbox"/>
Configured 'Payment Due' event is triggered	<input checked="" type="checkbox"/>
Editor clicks 'Rescind Decision' Action Link when the 'Payment Due' event has been triggered	<input type="checkbox"/>
The Final Disposition is set to Reject, Withdrawn, or Transfer for an APC submission	<input type="checkbox"/>
The Final Disposition is set to Accept for a submission where the Author declined the APC	<input type="checkbox"/>
Author or Editor clicks 'Remove Submission' Action Link for an APC Article	<input type="checkbox"/>
An 'Incomplete with Author' submission is archived	<input type="checkbox"/>

[Configure Publication Charges Processing](#)

Customize Publication Charges Instructions for the Author: New text fields enable publications to enter customized text for these elements in the Author interface:

- Publication Charges Page Heading: Text will display as header in left column on Publication Charges page.
- View Publication Charges Button and Link: Text will display on button on Publication Charges page and links on Author's Decision page and in Author folders, as well as links in Editor and Publisher folders.
- Pay Publication Charges Link: Text will display in links in Author folders.
- Publication Charges Page Author Agreed Text: Text will display on the Publication Charges page after the Author interacted with the external payment system and agreed to submit.
- Publication Charges Page Author Declined Text: Text will display on the Publication Charges page after the Author interacted with the external payment system and declined to submit.

A new **RoleManager** permission is available for Editor and Publisher roles, View Publication Charges. This permission allows a user with an Editor or Publisher role who is editing a submission to view the APC estimate. This permission also allows an Editor (with Proxy for Authors permission) to click the Action links, View Publication Charges and Pay Publication Charges, while operating in proxy mode for an Author who has submitted an APC article.

Production Tracking Enhancements

Enterprise View for Cross-Publication Task Handling

In the past, ProduXion Manager users with Editor or Publisher roles who work across several publications had to log in and out of several publication sites to perform their assigned tasks. New in EM/PM 16.1, for publication sites that belong to the same Business Publisher with the same Unified Database(UDB), Enterprise View (EV) enables production staff to manage the production process across multiple publications from a single location in PM. Users can view and access tasks across multiple publication sites that belong to the same Business Publisher.

New Enterprise View Tab and Menu include a limited version of the production To-Do List, displaying links to two folders: Submission Tasks Assigned to Me and Schedule Group Tasks Assigned to Me. It also displays links to Cross-Publication Enterprise Analytics Reporting and to Search Submissions (cross-publication) for users with associated RoleManager permissions.

New Enterprise View tab provides access to EV features for Editor and Publisher roles



In Enterprise View, the Submission Tasks Assigned to Me folder and the Schedule Group Tasks Assigned to Me folder display any submissions with tasks assigned to the logged-in user across all publications that have been configured for the user to access. On the “home” publication site (the site where the user is currently logged in) submissions display the same Action links as those displayed in the folder on the Production Tasks tab.

Submissions on a different publication site display one link in the Action column: [Go to Task](#). Clicking this link takes the user to the corresponding folder (either Submission Tasks Assigned to Me or Schedule Group Tasks Assigned to Me) on the publication site where that submission task was assigned, i.e. the “target” site. The user is automatically logged in to the target site, and the submission’s Action column contains all available Action links.

EV assignment folders show the Publication Code for each submission, and a Go to Task link displays for tasks on other publications; clicking the link takes the user to the same EV folder on the other site (after automatic login)

SITE 1		SITE 2	
Action	Publication Code	Action	Publication Code
Assignment Files Submit Task Reassign Task Assign to Schedule Group Production Details ▾ History Transmittal Form Edit Submission Send E-mail	SAMDE	Go To Task	SAMDE
Go To Task	SALLYD	Submit Task Reassign Task Assign Production Task Assign to Schedule Group Production Details ▾ History Transmittal Form Edit Submission Send E-mail	SALLYD
View Assignment Letter Submit Task		Go To Task	SAMDE

Cross-publication login is configured by each individual user via the Update My Information page. This existing functionality determines what publication sites the user can access using the “Go to” drop-down menu in the top navigation bar. With Enterprise View enabled, this configuration also determines the sites available to the user in the EV folders.

Users configure cross-publication login via their own Update My Information page

Update My Information

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

[Edit 'Go to' Publication List](#)

[Correspondence History](#)

'Go to' Publication List

Publication	Matching Record?	Auto Login?	
Publication1	Yes	-	Remove
Publication2	No	-	Verify Remove
Publication3	Yes	Yes	Remove

Add Publication (Acronym): [Add](#)

[Batch Verify](#) [Copy List to Matching Records](#)

[Close](#)

The EV menu is added to the drop-down list on the Search People – Update Information page. This allows Editors with Search People permission to set a user’s default login menu to Enterprise View Menu.

Enterprise View Menu is added to the options of Default Login Menu on the Search People – Update Information page

The screenshot shows the 'User Information' update page. A text box at the top explains: 'The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.' Below this, the 'Default Login Role' is set to 'Editor'. The 'Default Login Menu' dropdown is open, showing options: 'Enterprise View Menu' (highlighted with a mouse cursor), 'Editorial Menu', 'Proposal Menu', 'Production Menu', and 'Enterprise View Menu' (highlighted in blue). Other fields include 'Available as a Reviewer?', 'Board Member?', 'Forbidden as a Reviewer?', 'Reviewer Role *' (None), 'Publisher Role *' (None), and 'Editorial Role *' (Production Editor).

Search submissions in Enterprise View

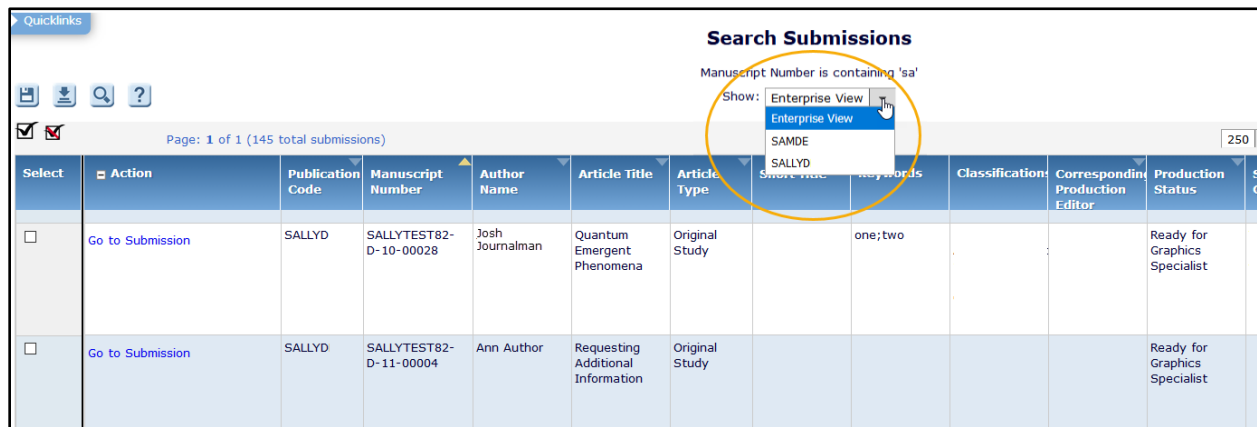
Users with permission can search for submissions across publications with the EV submission search tool. The search tool is available via a link on the EV tab and in the “Go to” drop-down menu in the top navigation bar. The tool is a modified version of the single-publication search tool. Some important points to note:

- EV searches are executed against the Publisher’s UDB, pulling from all publications the user is authorized to access (according to cross-publication login configuration). Results are returned from those publications (limited by other permissions and business rules, e.g., blinded submissions).
- For most search criteria/selector combinations, the Value column displays a simple empty textbox where the user must enter the value. (The single-publication search tool displays a drop-down list of available values for some searches; however, this would be unmanageable for cross-publication searching.) Exceptions are Discussion Status (drop-down menu displays two options: Open, Closed) and Publication Code (drop-down menu displays codes for all publications the user is authorized to access).
- EV search definitions may be saved and displayed on a user’s EV Menu, but sharing EV search definitions with other users is not available at this time.
- The Search Definition drop-down list displays only EV search definitions, and the single-publication search tool does not display EV search definitions. The tools are separate.

The search results page is similar to single-publication search results:

- Tools on the search results page (Save, Download Results, etc.) are the same as those for single-publication searches.
- Submissions on the home publication site display the same Action links as those displayed for single-publication searches.
- Submissions on a different publication site display a [Go to Submission](#) link. Clicking the link takes the user directly to the submission on the target publication site, where all authorized actions can be taken.
- Results display a publication code to indicate the site where the submission was made. Results may be filtered by publication code, using the drop-down list above the results grid.

EV search results can be filtered by publication code



TO CONFIGURE:

To enable Enterprise View, contact your Aries Account Coordinator. Publication sites must belong to the same Business Publisher with a UDB.

Configure **RoleManager** for Editor and Publisher roles. A new Enterprise View section is added to the Edit Role Definition page for Editor and Publisher roles:

- **Access Enterprise View Tab:** Enabling this permission displays the EV tab and functionality to the user role.
- **Search All Submissions in Enterprise View:** Enabling this sub-permission allows users with this role to use the EV search tool. (Roles must also have existing Search All Manuscripts permission on each individual publication; EV search results will not appear for publications on which the user does not have this permission.)

Roles must also be granted two existing permissions related to cross-publication login, in order to be able to configure access to other publications (as described on page 10):

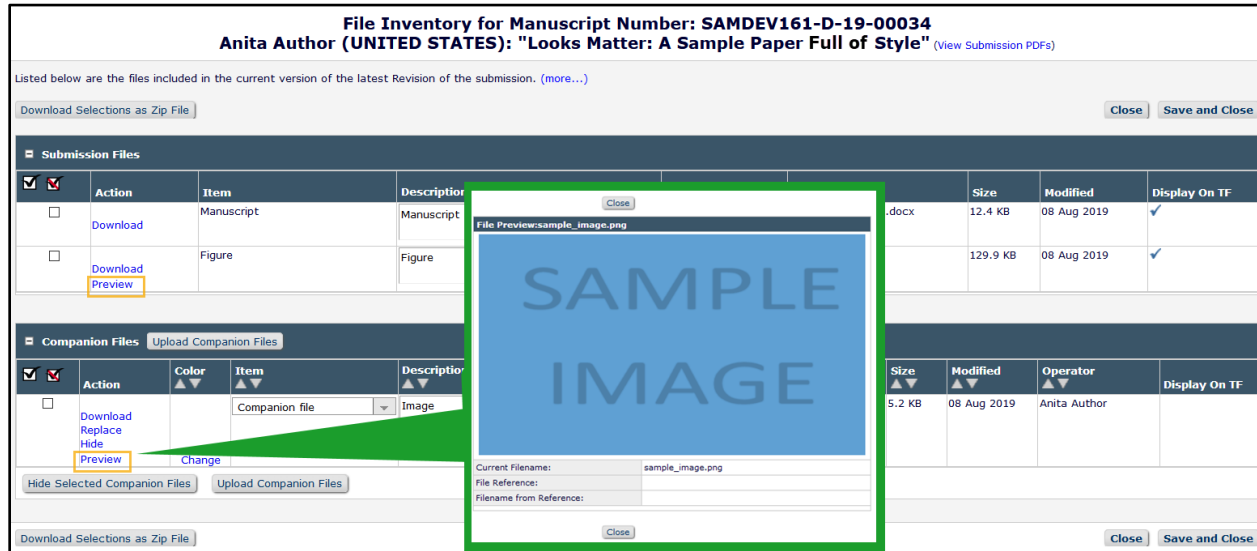
- Access 'Go To:' Publication List
- Allow Automatic Login to this Role

Preview for Uploaded Image Files

New in version 16.1, PM users can preview uploaded image files via the File Inventory. A [Preview](#) link displays for Companion files and for Submission files. The link opens a pop-up window showing the image and associated metadata.

Existing images will not yet have an associated Preview image; the link will still show for such files in the Figure Family, and opening the preview window will trigger the creation of the preview image behind the scenes. It will be available after a short delay.

Preview link on the File Inventory page opens a pop-up window with preview image



The screenshot displays the 'File Inventory for Manuscript Number: SAMDEV161-D-19-00034' by Anita Author (UNITED STATES). The interface is divided into 'Submission Files' and 'Companion Files' sections. A table lists files with columns for Action, Item, Description, Size, Modified, and Display On TF. A 'Preview' link is highlighted in the 'Companion Files' section, which opens a pop-up window titled 'File Preview-sample_image.png'. The pop-up window shows a blue background with the text 'SAMPLE IMAGE' and a 'Close' button. Below the image, there are fields for 'Current Filename: sample_image.png', 'File Reference:', and 'Filename from Reference:'. The 'Preview' link in the table is highlighted with a green box, and a green arrow points from it to the pop-up window.

Action	Item	Description	Size	Modified	Display On TF
<input checked="" type="checkbox"/> Download	Manuscript	Manuscript	12.4 KB	08 Aug 2019	<input checked="" type="checkbox"/>
<input type="checkbox"/> Download Preview	Figure	Figure	129.9 KB	08 Aug 2019	<input checked="" type="checkbox"/>

Action	Color	Item	Description	Size	Modified	Operator	Display On TF
<input checked="" type="checkbox"/> Download Replace Hide Preview Change		Companion file	Image	5.2 KB	08 Aug 2019	Anita Author	<input type="checkbox"/>

TO CONFIGURE:

No configuration is required.

Rename Files via Production Task Using File Reference

New in version 16.1, a File Reference field is added to the File Inventory page to provide an easy way for publication staff to rename files for organization, download, and transmittal. The File Reference field allows a new name to be applied to the downloaded or transmitted file while leaving the file's original name (at upload) unchanged in the system. The File Reference feature will be available for use in both EM and PM, and the File Reference field will be available for all files visible in the File Inventory (submission and companion files).

Task types can be configured to rename files by default, using the File Reference field. A new checkbox setting is added to the production task configuration page to enable the system to create and automatically apply new file names based on defined File Reference values.

When this setting is enabled the system will automatically rename any assignment files included in the ZIP file created for transmittal by SFTP. In addition, the new names will be applied automatically to assignment files when they are downloaded by the task assignee unless the assignee has the new RoleManager permission related to renaming files. Users with the new RoleManager permission will be asked if they want to rename the files or to override the automatic renaming.

For a full description of this feature, see page 15.

TO CONFIGURE:

To rename files by default via a task, a new setting is added to the Add/Edit Submission Production Task page (**PolicyManager** > ProduXion Manager > Configure Submission and Production Tasks > Configure Submission Workflow > Add/Edit Submission Production Task). This setting determines if files should be renamed automatically on transmittal or download by default. (Default option applies on download for users who do not have the RoleManager permission related to renaming files. Users who do have the permission will be offered a choice when manually downloading assignment files.)

Detail of Add/Edit Submission Production Task page: New checkbox setting enables the system to create and automatically apply new file names based on file references

Enable the **Rename Assignment Files by File Reference** permission to have the system create new filenames for each Assignment file that has a File Reference. The new name will be applied when the Assignment File is downloaded or included in a ZIP file (e.g. for FTP transmittal).

Rename Assignment Files by File Reference

Merge Field Enhancements

Batch Reassign Open Editor Assignments Merge Field

%BATCH_EDITOR_ASSIGNMENT_MS_LIST% inserts the list of submissions selected to be batch-reassigned to a new Editor in the format:

Manuscript Number: 'Article Title' by Corresponding Author Name (Editorial Status)

The merge field is available for use only in Assign/Unassign Editor for Submission Batch letter family.

New Merge Field Type for Additional Manuscript Details

EM 16.1 introduces new type of merge field to enable the insertion of AMD descriptions and values into system letters. See page 4.

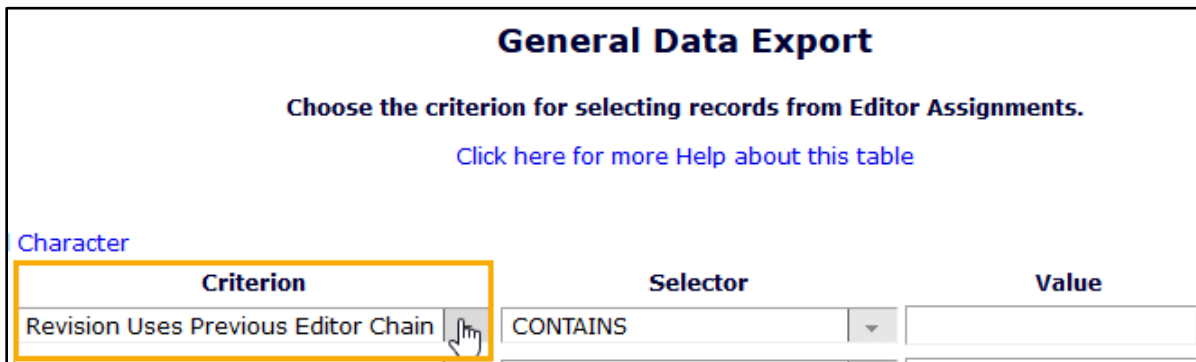
Reporting Enhancements

Change to Editor Assignments Table

A field in the Editor Assignments Table [ROLEEDIT] has been renamed. The purpose of this change is to avoid confusion with any element of the new Batch Reassign Open Editor Assignments feature (see page 1). The Editor Assignments Table is available in General Data Export and Enterprise Analytics Reporting.

The Short Description of the field ROLEEDIT.REASSIGNED_CHAIN will now appear as “Revision Uses Previous Editor Chain.” (The former description was “Assigned Using Batch Reassignment.”)

New Short Description appears in Criterion drop-down list in General Data Export and in the Field drop-down list in EAR



Detail of Editor Assignments Table column headings, showing new Short Description

Suggest Editor Queue ID	Revision Uses Previous Editor Chain	Assigned Using Chain Template	De ID
	True	True	

TO CONFIGURE:

No configuration is required. Users with reporting permissions will see the new field description.

Enhanced Equivalence Filters in XEAR Reports

For Publishers with a Unified Database (UDB), Cross-Publication Enterprise Analytics Reporting (XEAR) enables authorized users to produce reports that contain data for all publications that write to the Publisher's UDB. XEAR reports include functionality for filtering that allow a user to limit the result to be displayed. Because there is a large amount of data in a Publisher's UDB, users have found that some filter fields were slow to load in previous versions of EM. New in EM 16.1, several equivalence operators are enhanced to improve performance when using these operators to filter on Article Type Name and Production Task Name.

When the operator selected is Equals (Select), Equals (Multiple), Doesn't Equal (Select), and Doesn't Equal (Multiple), the Values column displays a list of allowable values. These allowable values are pulled from the UDB via a query. The query is modified to provide improved performance and response time when populating these lists.

TO CONFIGURE:

No configuration is required. Users with reporting permissions on a publication site using XEAR will have access to the enhanced filters.

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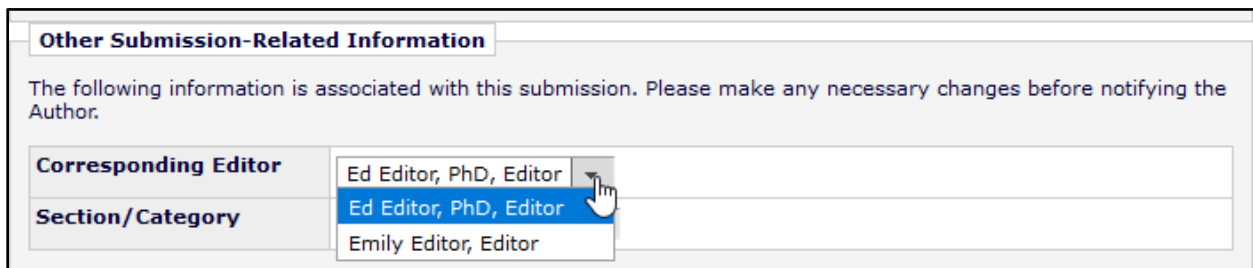
General Enhancements

Display Corresponding Editor Field on Notify Author Page

The Corresponding Editor for a submission is the designated contact person for email correspondence related to the submission. In EM, the Corresponding Editor designation may be assigned automatically to the Handling Editor (i.e., the Editor with current responsibility) via configuration in PolicyManager. The Corresponding Editor designation may also be changed manually via the Details page by an Editor with the applicable RoleManager permission.

New in EM 16.1, the Corresponding Editor field can be configured to display on the Notify Author page as a drop-down list including all Editors in the submission's Editor chain. Editors (with RoleManager permission Change Corresponding Editor) can use the drop-down list to change the Corresponding Editor during the decision process without having to go to the Details page. Editors without the RoleManager permission see a read-only Corresponding Editor field. The field is displayed in the Other Submission-Related Information section of the page.

Detail of Notify Author page showing the Corresponding Editor field as a drop-down list



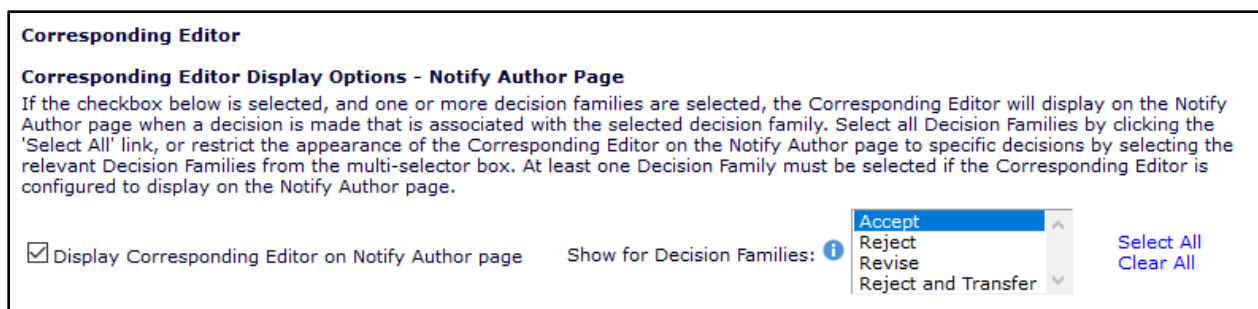
The screenshot shows a section titled "Other Submission-Related Information". Below the title, there is a text block: "The following information is associated with this submission. Please make any necessary changes before notifying the Author." Below this, there is a table with two columns: "Corresponding Editor" and "Section/Category". The "Corresponding Editor" cell contains a drop-down menu with three options: "Ed Editor, PhD, Editor" (selected), "Ed Editor, PhD, Editor", and "Emily Editor, Editor". A mouse cursor is pointing at the selected option.

TO CONFIGURE:

The Corresponding Editor field is configured to display on the Notify Author page by Decision Family. Go to **PolicyManager** > Editor Assignment Policies > Set Editor Assignment Options. A new setting is added to the page: Corresponding Editor Display Options – Notify Author Page.

Check the box to enable the display of the field on the Notify Author page. Use the multi-selector tool to choose one or more Decision Families (Accept, Reject, Revise, Reject and Transfer). When an Editor submits a decision in one of the selected families, the Corresponding Editor field will be displayed on the Notify Author page.

Detail of Set Editor Assignment Options page, showing new Notify Author page settings



The screenshot shows the "Corresponding Editor" section of the "Set Editor Assignment Options" page. It includes a heading "Corresponding Editor Display Options - Notify Author Page" and a paragraph of instructions. Below the text, there is a checkbox labeled "Display Corresponding Editor on Notify Author page" which is checked. To the right of the checkbox is a multi-selector tool labeled "Show for Decision Families:" with an information icon. The multi-selector is open, showing a list of decision families: "Accept" (selected), "Reject", "Revise", and "Reject and Transfer". To the right of the multi-selector are two buttons: "Select All" and "Clear All".

Section/Category Enhancements

Some publications use Sections and Categories to organize submissions. Section/Category information may be used in several ways: to identify the section of a publication in which a submission should be included; to identify a group of submissions for which a particular Editor holds responsibility; to identify a submission with a category to facilitate searching submissions. Two enhancements to Section/Category functionality are now available in EM 16.1: A Custom Metadata ID can be configured for each Section/Category, and a Section/Category drop-down list can be configured to display on the Notify Author page. This drop-down list enables Editors to confirm or change the submission's Section/Category during the decision process. The field is displayed in the Other Submission-Related Information section of the page.

Detail of Notify Author page showing the Section/Category field as a drop-down list

Other Submission-Related Information

The following information is associated with this submission. Please make any necessary changes before notifying the Author.

Corresponding Editor	Ed Editor, PhD, Editor
Section/Category	Please Choose
Confidential Comments to	

TO CONFIGURE:

Go to **PolicyManager** > Submission Policies > Edit Sections/Categories. New settings are available the two enhancements.

To configure a Custom Metadata ID:

- For a new Section/Category, enter a name and Custom Metadata ID in the fields on this page and click the Add button. If custom metadata IDs that relate to Sections/Categories have already been configured on the Define Custom Metadata IDs page, the custom metadata ID can be selected by clicking the Select Custom Metadata ID hyperlink.
- For existing items: click the Edit link next to an existing Section/Category to open the Edit Section/Category Name page, enter the Custom Metadata ID in the field (or click link to select an existing ID), and click the Update button to save.

To display field on Notify Author page: Check the box to enable display of the field on the Notify Author page. Use the multi-selector tool to choose one or more Decision Families (Accept, Reject, Revise, Reject and Transfer). When an Editor submits a decision in one of the selected families, the Section/Category drop-down list will be displayed on the Notify Author page.

Detail of Edit Sections/Categories page (in PolicyManager), showing new settings: Custom Metadata ID may be defined for a new Section/Category and the display options for Notify Author page are set here

New Section or Category:

Maximum Section/Category name is 100 characters

Responsible Editor (required if Editor Assignment is configured as 'Submissions where Author has selected a Section/Category'):

Custom Metadata ID:

[Select Custom Metadata ID](#)

Notify Author Display Options:

Display Sections/Categories on Notify Author page

Show for Decision Families:

[Select All](#) | [Clear All](#)

- Accept
- Reject
- Revise
- Reject and Transfer

Detail of Edit Section/Category Name (in PolicyManager), showing new Custom Metadata ID setting; Custom Metadata ID may be defined for existing Sections/Categories here

Edit Section/Category Name

Section/Category Name:

Maximum Section/Category name is 100 characters

Responsible Editor (required if Editor Assignment is configured as 'Submissions where Author has Selected a Section/Category'):

Custom Metadata ID:

[Select Custom Metadata ID](#)

Hide When you **Hide** a Section/Category, the Section/Category will be deactivated (not available for new or revised manuscripts).

Version 16.1 Release Notification Supplement – August 2020

General Enhancements

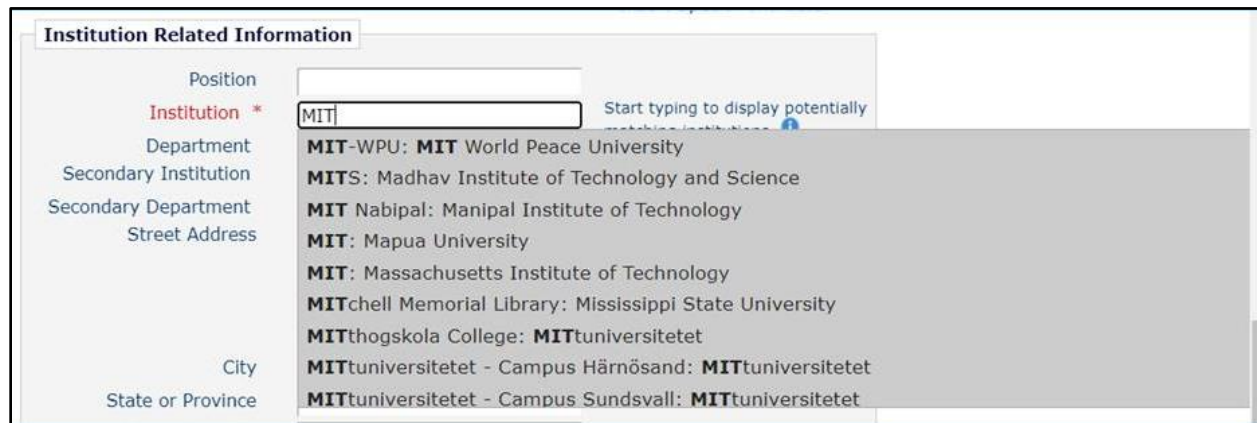
Institution List Display Enhancement

Editorial Manager's Institution Name Normalization feature ensures a more standardized record of user affiliations, even when users may enter variations or abbreviations of institution names. As a user begins to type the name of an institution, an auto-complete tool examines the characters entered and shows suggested matches from an authoritative, standard list of institutions. This auto-complete tool appears for the Institution and Secondary Institution fields throughout the system.

Previously in EM, when a user began entering text in an Institution field, the tool displayed up to 30 potential matches in the drop-down list. Sometimes users thought proposed matches were illogical or irrelevant.

Now in EM 16.1, the search mechanism behind the Institution Name Normalization feature is enhanced to improve the accuracy of the list of potential matches displayed to users. When a user enters text in the Institution (or Secondary Institution) field, the auto-complete tool will associate an institution name with its commonly used short name or acronym (e.g., MIT, UCLA, UT Austin). When potential matches occur, both the commonly used name and institution full name will be presented, separated by a colon. Portions of the names that match the entered text will appear in bold.

Enhanced list is displayed when a user enters text in an Institution field.



The screenshot shows a form titled "Institution Related Information" with several fields: Position, Institution *, Department, Secondary Institution, Secondary Department, Street Address, City, and State or Province. The "Institution *" field contains the text "MIT". A dropdown menu is open below this field, displaying a list of suggestions. Each suggestion consists of a short name followed by a colon and the full name. The short name "MIT" is bolded in each suggestion. The suggestions include: "MIT-WPU: MIT World Peace University", "MITS: Madhav Institute of Technology and Science", "MIT Nabipal: Manipal Institute of Technology", "MIT: Mapua University", "MIT: Massachusetts Institute of Technology", "MITchell Memorial Library: Mississippi State University", "MITthogskola College: MITuniversitetet", "MITuniversitetet - Campus Härnösand: MITuniversitetet", and "MITuniversitetet - Campus Sundsvall: MITuniversitetet". A blue cursor is visible at the end of the "MIT" text in the input field.

TO CONFIGURE:

No additional configuration is required for publications already using Institution Name Normalization. To enable the feature, go to **PolicyManager** > General Policies > Enable Institution Name Normalization.

Version 16.1 Release Notification Supplement – November 2020

General Enhancements

Read & Publish Processing

Read & Publish is a license category encompassing both Open Access (OA) and subscription/paywall publication models. A Read & Publish agreement, negotiated between a publisher and a consortium of participating institutions, grants those institutions access to published subscription content in exchange for discounting or waiving OA publication charges for authors affiliated with those institutions.

Now in EM 16.1, a publication can define consortia and their participating organizations for Read & Publish processing on a publication site. When a Corresponding Author selects an Article Type configured for use with Read & Publish processing, the system will attempt to match the Corresponding Author's institution with one in an active Read & Publish consortium. If a match is found, the system will flag the submission (not visible to users), and OA publication charges may be discounted or waived, depending on the terms of the agreement.

A new merge field, %READ_AND_PUBLISH_TO_AUTHOR%, may be used in submission confirmation letters to Corresponding Authors whose institutions are recognized by EM as part of an active Read & Publish consortium defined in the publication's system. The merge field is populated by customizable text and may be used to provisionally inform Corresponding Authors that their submission, if accepted, may be eligible for OA publication funded by the consortium. This merge field may also be used in decision letters; it will populate only in letters sent to the Corresponding Author. The merge field will not populate in Author letters sent for submissions that do not use an Article Type configured for Read & Publish processing.

Sending a letter containing this merge field will trigger a query in the system that determines the submission's eligibility for Read & Publish processing. Editor roles with reporting permissions can trigger this same query by running a report using the new Read and Publish View, available in Custom Reports, Enterprise Analytics Reporting, and Cross-Publication Enterprise Analytics Reporting.

Depending on the publication's policies, if an accepted submission is identified as *not* eligible for consortium-funded OA publication, the Author may either pay the OA publication charges (via the publication's processing mechanism) or publish the paper under the publication's subscription/paywall policy.

TO CONFIGURE:

Read & Publish consortia must be defined and Article Types must be configured for use with Read & Publish processing. Institution Name Normalization must be enabled.

To define consortia, go to **AdminManager** > Configure Read & Publish Preferences > Define Read & Publish Consortia.

1. Click + Add a New Consortium to open a pop-up window.
2. Enter a Consortium Name.
3. Select member institutions.
 - a. Enter text in the Select an Institution field; potential name matches will appear in the drop-down list.
 - b. Choose the correct name from the list.

- c. Click the Add this Institution button.
- d. Repeat steps a – c for each institution to be added.
4. Click the Save icon.
5. On the Define Read & Publish Consortia page, click the Activate Consortium link next to the consortium name.

New Define Read & Publish Consortia page, shown with Enter Consortium Details overlay: System administrators may add, edit, activate, deactivate, and delete consortia.

Define Read & Publish Consortia

Any Read & Publish consortia defined for this publication are listed below.

Defined Consortia List	
	Northeast Consortium + Add a New Consortium Inactivate Consortium
	Pac Consortium 5 Activate Consortium
	Trans Canada Consortium Contains no member institutions

1 [+ Add a New Consortium](#)

Enter Consortium Details ✕

4 [Insert Special Characters](#)

Enter or update the consortium name and select the institutions that should be recognized as participating members of this consortium. Institution Name Normalization must be enabled in order to add or update institutions. Start typing in the 'Select an Institution' field to display a list of potentially matching institutions. Only institutions selected from the list may be added.

If the corresponding author's institution is recognized as a consortium member and that author submits an Article Type configured for Read & Publish processing, the submission may be eligible for consortium-funded OA publication if accepted.

2 Consortium Name*

Participating Institutions	
	MIT: Massachusetts Institute of Technology Hide Institution

3 Select an Institution: [Add this Institution](#)

- Harvard Combined Plastic Surgery Residency Training Program: Harvard Med
- Harvard Medical School
- Harvard University Program in Health Care Financing: Harvard University T H Public Health
- Harvard University HSPH: Harvard University T H Chan School of Public Health
- Harvard University T H Chan School of Public Health

The Define Read & Publish Consortia page shows all the defined consortia. Names of active consortia appear in black text; inactive consortia appear in gray text. The system sets all newly configured consortia to inactive by default. An inactive consortium cannot be activated unless it contains at least one member institution. Once a consortium is activated, EM will begin checking its member institutions against those of the Corresponding Authors of incoming submissions (for Read & Publish–configured Article Types).

An active consortium may be inactivated by clicking the Inactivate Consortium link next to its name in the Defined Consortia List. (Member institutions of inactive consortia are not checked against those of Corresponding Authors.) A consortium may be deleted only if none of its member institutions has ever been recognized as a match to the institution of a Corresponding Author.

The new Define Read & Publish Consortia page in AdminManager includes options to add (A), edit (B), or delete (C) consortia, and to activate (D) or inactivate (E) them.

Define Read & Publish Consortia

Any Read & Publish consortia defined for this publication are listed below.

Defined Consortia List		+ Add a New Consortium
	Northeast Consortium	E → Inactivate Consortium
B	Pac Consortium	D → Activate Consortium
C	Trans Canada Consortium	Contains no member institutions

A + Add a New Consortium

[Configure Read & Publish Merge Field](#)
[AdminManager Main Menu](#)

An existing consortium may be edited to add or remove member institutions; click the Edit icon next to the consortium name to open the Edit Consortium Details pop-up overlay. Adding institutions is done as described above. The Participating Institutions list allows a system administrator to change an institution’s status. If an institution has not yet been recognized as matching that of a Corresponding Author, it may be removed from the list (click the Delete icon next to its name). If an institution has previously been matched to one of a Corresponding Author, it cannot be deleted, but it can be hidden, i.e., retired from future use (click the Hide Institution link next to its name). A previously hidden institution can be returned to the active list (click the Display Institution link next to its name).

Detail of Edit Consortium Details pop-up overlay: The Participating Institutions list allows a system administrator to remove (A), hide (B), or restore (C) institutions.

Consortium Name*

Participating Institutions		
	Harvard University T H Chan School of Public Health	B Hide Institution
A	UConn School of Medicine: University of Connecticut School of Medicine	Hide Institution
	UMass Memorial Health Care: UMass Memorial Medical Center	C Display Institution

To customize the text populated by the %READ_AND_PUBLISH_TO_AUTHOR% merge field, go to **AdminManager** > Configure Read & Publish Preferences > Configure Read & Publish Merge Field. Enter the appropriate messaging in the text box and click Submit. (If no custom text is entered, the existing default text will be used for the merge field.)

Add the merge field to the submission confirmation letter to the Author. Go to **PolicyManager** > Email and Letter Policies > Edit Letters. Select the applicable letter and edit as needed to include the new %READ_AND_PUBLISH_TO_AUTHOR% merge field. Then confirm that the letter is associated with the ActionManager event New Submission Sent to Publication.

Article Types must be configured for use with Read & Publish processing. Go to **PolicyManager** > Submission Policies > Edit Article Types > Add/Edit Article Type.

A new checkbox setting, Allow Consortium-funded OA publication for this Article Type, is added to the Add/Edit Article Type page. When this box is checked, the system will attempt to match Read & Publish consortia institutions (as defined above) to the institution of the Corresponding Author for submissions of this Article Type.

Institution Name Normalization (an existing feature) must also be enabled. Go to **PolicyManager** > General Policies > Enable Institution Name Normalization. Check the box to enable.

Recommendation: The Institution registration field should be configured as required to ensure that the Corresponding Author's institution name is obtained during submission (**PolicyManager** > Registration and Login Policies > Edit Registration Fields).

Merge Field Enhancements

Read & Publish Statement for Author Letters

%READ_AND_PUBLISH_TO_AUTHOR% is available for use in letters to Corresponding Authors whose institutions are recognized by EM as part of an active Read & Publish consortium defined by the publication. The merge field is populated by customizable text intended to provisionally inform Corresponding Authors that their submission, if accepted, may be eligible for OA publication funded by the consortium. In addition to the submission confirmation letter, this merge field may also be used in decision letters; it will populate only in letters sent to the Corresponding Author. (The merge field will not populate in Author letters sent for submissions that are not an Article Type configured for use with Read & Publish processing.)

Reporting Enhancements

Read & Publish Consortia and Institutions Tables

Two tables are added in EM 16.1 to store data related to Read & Publish Processing.

The **Read & Publish Consortia** table is added to General Data Export. This table lists all the consortia defined for use on the publication site.

The **Read & Publish Consortium Institutions** table is added to General Data Export. This table holds relevant metadata for member institutions associated with the Read & Publish Consortia defined for use on the publication site (and listed in the table described above).

TO CONFIGURE:

No configuration is necessary. Users with reporting permissions will see the new tables.

EAR ReviewerCredits Standard Report

A single-journal ReviewerCredits standard report is introduced in EM 16.1 to facilitate the transfer of peer review data. This report lists Reviewers who have completed reviews in the previous seven days and who have authorized the publication to send their data to ReviewerCredits.

TO CONFIGURE:

No configuration is necessary. Users with reporting permissions on a publication using Enterprise Analytics Reporting will see this new report in the Third-Party Exports menu.

EAR/XEAR Reviewer & Submissions View Enhanced with Additional Fields

In EM 16.1, the Reviewers & Submissions View, available through Custom Reports, single-publication Enterprise Analytics Reporting and Cross-Publication Enterprise Analytics Reporting, is enhanced with the addition of eight fields. The Reviewer & Submissions View shows data about Reviewers and the submissions they have been invited and assigned to, as well as contact information for the Reviewer. The new fields provide information on ORCID review deposits.

The eight fields being added to the view are:

- ORCID Deposit Date
[ROLEREVU_DOC_PEOPLE_ADDR_AUTH_ED.ORCID_DEPOSIT_DAT]

- ORCID Deposit Error
[ROLEREVU_DOC_PEOPLE_ADDR_AUTH_ED.ORCID_DEPOSIT_ERROR]
- ORCID Deposit Status
[ROLEREVU_DOC_PEOPLE_ADDR_AUTH_ED.ORCID_DEPOSIT_STATUS]
- ORCID Deposit Reference
[ROLEREVU_DOC_PEOPLE_ADDR_AUTH_ED.ORCID_REFERENCE]
- ORCID Request Displayed
[ROLEREVU_DOC_PEOPLE_ADDR_AUTH_ED.ORCID_REVIEW_CREDIT_DISPLAYED]
- ORCID Request Response
[ROLEREVU_DOC_PEOPLE_ADDR_AUTH_ED.ORCID_REVIEW_CREDIT_RESPONSE]
- Review GUID [ROLEREVU_DOC_PEOPLE_ADDR_AUTH_ED.REVIEW_GUID]
- Review Form ORCID Configuration ID
[ROLEREVU_DOC_PEOPLE_ADDR_AUTH_ED.REVIEWFORM_ORCID_PEER_REVIEW_DEPOSIT_ID]

TO CONFIGURE:

No configuration is necessary. Users with reporting permissions will see these fields in the existing Reviewer & Submissions View and Cross-Publication Reviewer & Submissions View.

EAR Letter Families Table Added

In EM 16.1, the Letter Families table (currently available through General Data Export) is made available in Enterprise Analytics Reporting. This table is a list of all the letter families available for letter configuration.

TO CONFIGURE:

No configuration is necessary. Users with reporting permissions on a publication using Enterprise Analytics Reporting will see the Letter Family table in the drop-down list of tables and views.

Version 16.1 Release Notification Supplement – January 2021

General Enhancements

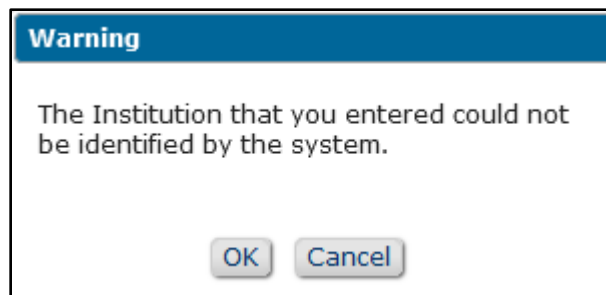
Institution Field Validation Enhancement

Editorial Manager’s Institution Name Normalization feature ensures a more standardized record of user affiliations. As a user begins to type the name of an institution, an auto-complete tool shows suggested matches from an authoritative, standard list of institutions, all with Ringgold IDs. Several features in EM rely on an exact match of a user’s institutional data to a Ringgold ID stored in the system. Previously, when a user entered text in the Institution field and did not select, the entry was accepted even if it could not be resolved to a matching Ringgold ID by the system.

New in EM 17.0, when the Institution Name Normalization feature is enabled and a user enters a name in the Institution field, the system will validate the entered name to see if it corresponds to a Ringgold ID.

EM will alert the user if the name does not correspond to a stored Ringgold ID to encourage selection of an institution from the picklist. A warning pop-up window will display, saying, “The Institution that you entered could not be identified by the system.” The user may click the OK button to proceed or the Cancel button to stay on the page and make corrections to the entered institutional data.

Notification to user when a name entered in the Institution field does not match a stored Ringgold ID.



Submitting an unverified, non-Ringgold institution may have undesirable consequences for users. For example, an Author whose institution cannot be resolved with a qualifying Ringgold ID may not be recognized as eligible for discounted or waived article processing fees. In addition, Identity Confidence Check scores may be affected for users who have entered an institution without a Ringgold ID.

Note: This Ringgold validation is not applied for Secondary Institution or Department fields.

TO CONFIGURE:

Institution Name Normalization (an existing feature) must be enabled. Go to **PolicyManager** > General Policies > Enable Institution Name Normalization. Check the box to enable.

No additional configuration is required.

Version 16.1 Release Notification Supplement – March 2021

General Enhancements

Reviewer Discovery Feature Discontinued

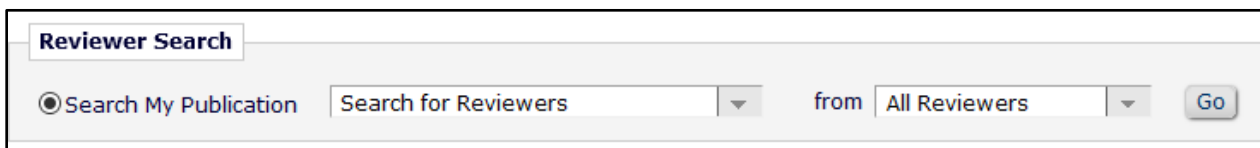
In EM versions 16.1 and 17.0, the Editorial Manager integration with ProQuest’s Reviewer Discovery and Pivot Database utility will be discontinued effective March 31, 2021.

On publication sites with this feature enabled, Reviewer Discovery will no longer appear as a search option on the Reviewer Selection Summary page.

Detail of Reviewer Selection Summary page: After March 31, the Reviewer Discovery option (shown in top image) will not longer appear on the page (shown in bottom image).



The screenshot shows a 'Reviewer Search' section with two radio button options. The first option, 'Search My Publication', is selected. The second option, 'Reviewer Discovery from pivot ProQuest Community of Scholars', is unselected. A red arrow points to the 'pivot' logo in the second option.



The screenshot shows the same 'Reviewer Search' section, but the 'Reviewer Discovery from pivot' option is no longer present. Only the 'Search My Publication' option remains.