CONFIDENTIAL AND PROPRIETARY

Aries Systems Corporation

em Editorial Manager®

pm Preprint Manager®

cm Commerce Manager™

Release Notification

Document Change Log

Date	Version	Change
3/15/2010	Gamma Release	Include two new sections: • Allow Authors to View Correspondence History • Designate External Correspondence to Display to Authors
3/29/2010	General Release	• Changes to Discussion Forum feature: Letter no longer required to Invite Editors • Addition of Inter-Journal Resource Sharing (IJRS) explanatory text in 'Transfer a Submission to Another Publication' section

Editorial Manager/Preprint Manager 7.3 General Release Notification

GENERAL ENHANCEMENTS
Discussion Forums

New in EM/PM v7.3, Editors may be allowed to invite other Editors to participate in an informal discussion (e.g. second opinion, editorial consultation) regarding a particular submission. A discussion can be initiated at any point in the workflow, and is tangential to the editorial workflow of Editor assignment, peer review, and Editor decision. The discussion is a side-bar conversation where Editors can pose questions and post comments without delaying the editorial or production process in any way.

NOTE: If a publication wants to effectively 'freeze' the editorial process while a submission is out for an informal discussion, this would be achieved by not assigning Editors or inviting Reviewers until the discussion thread is closed.

An Editor with the new 'Manage Discussions' RoleManager permission enabled can initiate a discussion for a particular submission from the submission's *Details* page by clicking the 'Initiate Discussion' link. Note that the Editor can initiate a discussion on any submission he has access to as governed by existing RoleManager permissions (i.e. he is in the Editor chain and/or can view all submissions).

Upon clicking the link, the Editor will be warned to save any changes they may have made on the *Details* page before proceeding. After proceeding, the Editor is brought to a new 'Initiate Discussion' page. On this page, all users with an Editor role are listed for the initiating Editor to choose from. All users with an Editor role are available for invitation to the Discussion; no additional permission is required for Editors to participate. After selecting Editors to join the Discussion, the Editor determines if these Editors may have access to any Reviews and Comments that may be attached to the submission, and/or if they may be allowed to download any files related to the submission (if they are not in the Editor chain). The Editor must enter the Initial Comments, and after selecting at least one person to participate, the Editor clicks either the 'Start Discussion without Sending Letters' button or the 'Proceed to Customize Letters' button.

Initiate Discussion for Manuscript Number: TONYTEST50-D-06-00001
Testing 1 2 3

Initial Comments	

Manuscript Classifications
(1) DYSLEXIA

Select ▲▼	Editor Role ▲▼	Editor Name ▲▼	Current Assignments ▲▼	View Reviews and Comments	Download Files(source and companion)	# Classification Matches ▲▼	Classification Matches	Available during next 30 days
☐	Amsterdam Handling Editor	Hermione Grainger	0	☐	☐	0		Yes
☐	Artwork Editor	Four T. Editor, none	0	☐	☐	0		Yes
☐	Associate Editor	Anthony Author, MD	2	☐	☐	0		Yes
☐	Associate Editor	Annie The Dog, PhD	7	☐	☐	0		Yes
☐	Associate Editor	Emily Editor, MD	9	☐	☐	0		Yes
☐	Copyeditor	Suzie Chapstick	0	☐	☐	0		Yes
☐	Copyeditor	Jen Editor, PhD	0	☐	☐	0		Yes
☐	Editor-in-Chief (This editor is already assigned to the current submission)	Edward Editor, MD	38	☐	☐	0		Yes
☐	Editor-in-Chief (Requested by Author)	Lyndon Holmes	1	☐	☐	0		Yes
☐	Editor-in-Chief	Smartbot Smartbot	0	☐	☐	0		Yes
☐	Managing Editor	Geraldine Ferraro	0	☐	☐	0		Yes
☐	Managing Editor (This is the corresponding author of the submission)	Mary Francois Smith, PhD	0			0		Yes
☐	Report Admin Role	Richard Wynne	0	☐	☐	0		Yes
☐	Report Admin Role	Richard Wynne	0	☐	☐	0		Yes
☐	Staff Editor	Jungle Book, oh	0	☐	☐	0		Yes
☐	Test Editor	Stacey Lavelle, MD	0	☐	☐	0		Yes

Cancel   Start Discussion without Sending Letters   Proceed To Customize Letters

If the Initiator clicks the 'Proceed to Customize Letters' button, then s/he is brought to the 'Confirm Selections and Customize Letters' page, where s/he can confirm the selection of Editors, and customize the letter that will be sent asking them to participate in the discussion:

When the letters are confirmed and sent, the Editors will be invited to participate in the Discussion.

If the Initiator clicks the 'Start Discussion without Sending Letters' button, the Discussion is opened, but letters are not sent.

In either path, if the publication is using existing Submission Flag functionality, users with RoleManager permission to 'Turn On Submission Flags' can set a flag immediately on the confirmation page to indicate there is a discussion associated with the submission. This flag is displayed to appropriately authorized users and can be turned off and searched via Search Submissions per existing functionality.

A new Letter Family called 'Discussion Forum' is created for letters associated with Discussion Forums. Additionally, there are two new merge fields available for use with Discussion Forum letters:

- **%DISCUSSION_POST%** - Inserts the comments posted in the Initial Comments box for a new discussion, or the most recent Comments posted by a participant in an open discussion.

- **%DISCUSSION_DEEP_LINK%** - Inserts a deep link to the discussion in the letter asking an Editor to participate in a discussion, or a reminder e-mail that is sent via the Send E-mail link on the *Discussions* page.

Once a discussion has been initiated and Editors asked to participate, the submission is displayed to all participants and the initiator in a new *Submissions with Active Discussions* folder. This folder is displayed on the Editor To-Do List at the end of the Pending Assignments list on the *Editorial Main Menu*. If the logged in Editor is not participating in any active discussions, this folder does not display.

The circumstances under which this folder displays are summarized as follows:

- If the Editor is a participant in an active discussion for a submission (that is, he was asked to participate; he may or may not yet have posted a comment), the folder displays with all of those submissions.

- If the Editor has 'Manage Discussions' permission, the folder also displays submissions with an active discussion where the Editor has initiated the discussion.

- NOTE: If the Editor viewing this folder is also in the Editor chain for a submission, he will see a 'Go To Submission' link for that submission. Clicking this link takes the user to a Search Submissions results page for that submission where he can perform other tasks on the submission he is assigned to (i.e. assign another Editor, invite Reviewers, make a decision, etc.).

Submissions with Active Discussions

Page: 1 of 1 (2 total Submissions)   Display: 10 ⌄ results per page

⊟ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Article Title ▲▼	Corresponding Author ▲▼	Date Discussion Started ▲▼	Discussion Initiator ▲▼	Editorial Status Date ▲▼	Current Editorial Status ▲▼
Discussion Go To Submission Send E-mail	BETSYTEST61-D-08-00012	Original Study	The Rain in Spain: Does it Fall Mainly on the Plain?	Donna Donna	Nov 13 2009 03:24PM	Edward Editor, MD	Dec 22 2008 04:33PM	Authors Invited
Discussion Send E-mail	DEMO-D-03-00064	Perspective	test ms 1	Bob Massicotte, xyz	Nov 17 2009 01:41PM	Lyndon Holmes	Aug 26 2005 01:57PM	Reject

Page: 1 of 1 (2 total Submissions)   Display: 10 ⌄ results per page

Editor Main Menu

Editors may access the 'Discussion' page for a submission on which they are a participant by clicking the 'Discussion' link for a submission from the *Submissions with Active Discussions* folder, by clicking the deep link in the letter asking them to join the discussion, or by clicking the 'Discussion' link on the *Details* page of the submission.

On the *Discussions* page, participants can:

a) Post a Comment – Notification of the comment will be automatically sent to the discussion initiator if a notification letter is selected on the Configure Discussion Forum Settings page in PolicyManager.

b) View all other participants' comments

**Discussion for Manuscript Number: BETSYTEST61-D-08-00012
"The Rain in Spain: Does it Fall Mainly on the Plain?"**

Please discuss. Be aware people can read this.

View Submission   File Inventory

Participant ▲▼	Comments	Date ▲▼
Emily Editor, MD	Annie is right; I've not been to Spain, but have a friend who has (more...)	Nov 30 2009 04:22PM
Annie The Dog, PhD	Spain is rather large; there may be many microclimates to be considered? Worth investigating.(less...)	Nov 30 2009 04:21PM
Edward Editor, MD	Can you provide any information I may not have considered on this (more...)	Nov 13 2009 03:24PM

Post

On the *Discussions* page, the initiator of the Discussion or an Editor with 'Manage Discussions' permission enabled can:

a) Post a comment

b) View all participant comments

c) Modify participant access to 'View Reviews and Comments' and 'Download Files'

d) Remind a participant to post a comment (Send E-mail link)

e) Add more participants to the discussion

f) Conclude (close) the discussion for the submission. Once a discussion has been concluded, it no longer appears in the *Submissions with Active Discussions* folder. However, all participants and the initiator have continued visibility to the entire discussion thread on the *Discussions* page via *Details*, even after the discussion is closed.

g) Re-open (initiate) a concluded discussion to continue the previous discussion or start another discussion for a new topic

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h) Editors with proper permission can also manage flags directly from the
    Discussions page

Discussion for Manuscript Number: BETSYTEST61-D-08-00012
"The Rain in Spain: Does it Fall Mainly on the Plain?"

Please discuss. Be aware people can read this.

Participant Summary   View Submission   File Inventory   Add/Edit Submission Flags

Participant ▲ ▼	Comments	Date ▲ ▼
Emily Editor, MD	Annie is right; I've not been to Spain, but have a friend who has (more...)	Nov 30 2009 04:22PM
Annie The Dog, PhD	Spain is rather large; there may be many microclimates to be considered? Worth investigating.(less...)	Nov 30 2009 04:21PM
Edward Editor, MD	Can you provide any information I may not have considered on this (more...)	Nov 13 2009 03:24PM

Post

Add Participants

Conclude Discussion

Participant	# Posts	Latest Post	View Reviews and Comments	Download Files	
Anthony Author, MD	0		☐	☑	Send E-mail
Annie The Dog, PhD	1	Nov 30 2009 04:21PM	☐	☑	Send E-mail
Edward Editor, MD	1	Nov 13 2009 03:24PM	✓	✓	Send E-mail
Emily Editor, MD	1	Nov 30 2009 04:22PM	☑	☑	Send E-mail

Cancel   Save and Close

E-mail Letters can be configured to be sent for the following activities:

a) An Editor is asked to join a discussion – upon inviting Editors, the Initiator has the opportunity to send out letters. A default letter may be selected in PolicyManager.

b) A comment is posted – when a comment is posted by a participant, a notification is sent to the initiator only, to prevent a flood of emails being sent to participants.

A submission can have only one discussion associated with it. If an Editor wishes to initiate a second discussion (i.e. another topic) for a particular submission after the initial discussion has been concluded, the discussion can be re-opened with a different comment, and additional participants (or the same participants) can be invited to participate in the discussion. All of the comments and posts are stored in a single

'stream' for that submission, providing complete visibility to all comments in a single location.

Concluded discussion:

**Discussion for Manuscript Number: DEMO-D-03-00064
"test ms 1"**

Please discuss. Be aware people can read this.

Participant Summary   View Submission   View Reviews and Comments   File Inventory

Close   Re-open Discussion

Participant ▲▼	Comments	Date ▲▼
Lyndon Holmes	Does this test seem sound?	Nov 17 2009 01:41PM

**Discussion for Manuscript Number: DEMO-D-03-00064
"test ms 1"**

Please discuss. Be aware people can read this.

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

Participant ▲▼	Comments	Date ▲▼
Edward Editor, MD	Has anybody seen a study similar to this recently?	Nov 30 2009 04:47PM
Lyndon Holmes	Does this test seem sound?	Nov 17 2009 01:41PM

All discussion posts; prior discussion and new discussion.

Post

Add Participants

Conclude Discussion

All participants. Participants of prior discussions are in grey italics. Participants of current discussion are available for change.

Participant	# Posts	Latest Post	View Reviews and Comments	Download Files	
Annie The Dog, PhD	0		☑	☑	Send E-mail
Edward Editor, MD	1	Nov 30 2009 04:47PM	-	-	-
Emily Editor, MD	0		☑	☑	Send E-mail
Lyndon Holmes	1	Nov 17 2009 01:41PM	✔	✔	Send E-mail

Cancel   Save and Close

TO CONFIGURE:
In PolicyManager, go to 'Edit Letters'. A new 'Discussion Forum' Letter Family is added. Letters created in this Family are configured on the *Configure Discussion Forum Settings* page for use in three ways:

1. Editor asks one or more Editors to participate - The initiator must select at least one Editor when he opens the discussion, and he may ask other Editor(s) to join at any time while the discussion is active (open). When a letter is associated with this (see below), then the Inviting Editor may customize the letter(s) before sending the invitations.

2. Participant posts a comment– A notification letter can be automatically sent to the initiator of the forum (if configured – see below). This letter cannot be customized before sending.

3. An Editor with Manage Discussions permission clicks the 'Send E-mail' link on the Discussions page – the Editor may then choose from all letters in the 'Discussion Forum' family to customize and send to the participant.

After the letters are created, the next step is to go to the *Configure Discussion Forum Settings* page in PolicyManager.

Customize any instructions to display on the *Discussion* page, select notification letters for the 'Ask Editor to Participate' and 'Comment Posted' steps, and specify the %DISCUSSION_DEEP_LINK% expiration policy on this page.

Configure Discussion Forum Settings

Custom Instructions

Enter any instructions that you would like to appear on the Discussion page.

Insert Special Character

Select Discussion Forum Letters

Ask Editor to Participate	None	
Comment Posted	None	Notification sent to discussion initiator only

Deep Link Expiration

Please specify how long the Discussion Deep Link (%DISCUSSION_DEEP_LINK%) remains active. To keep the link active indefinitely, do not check any of the boxes. If all boxes are checked, the link expires when the first criteria is met.

☑ Expire link after [1] clicks
☐ Expire link after [ ] days
☐ Expire when discussion is concluded

Cancel   Submit

There are two new Editor RoleManager permissions for Discussion Forums:

a) Manage Discussions - When this permission is enabled, the Editor can:

- Initiate a discussion and customize/send a letter to other Editors asking them to participate in the discussion.

- See the *Submissions with Active Discussions* folder on the Editorial Main Menu – The Editor would have access to all submissions in which he either initiated the discussion (and it is still open) or is currently participating in a discussion initiated by another person.

  o NOTE: If an Editor is blinded to a submission, he cannot be selected on the *Select Participants* page, and therefore would not have access to that submission in the *Submissions with Active Discussions* folder.

- Post comments in any active discussions in which he is the initiator or a participant.

  o NOTE: If he was not the initiator or asked to participate by the initiator, he could invite himself to participate and then post a comment.

- Send E-mail to participants – While the discussion is still open, the initiator can click the Send E-mail link on the *Discussion* page to send an e-mail to one or more participants in the discussion.

- Conclude (i.e. close) the discussion – The user can close out any active discussions that he has access to, regardless of whether he was the initiator or a participant in the previous discussion.

- Re-open the discussion – After a discussion has been concluded, any Editor with 'Manage Discussions' permission can 're-open' a concluded discussion by clicking the 'Re-Open Discussion' button.

  o NOTE: The Editor must search for the submission; it will no longer be listed in the *Submissions with Active Discussions* folder once the Discussion is closed.

b) View All Discussions – When this permission is enabled, the Editor can:

- View all discussions – both open and concluded – for submissions he has access to in the system. He can access these submissions via the *Details* page (in the *Submissions with Active Discussions* folder he can only view discussions in which he is a participant). This permission is likely to be enabled for an office staff person or Managing Editor who needs visibility to all discussions and posts, even if they are not the initiator or a participant in the discussion.

  o NOTE: If a person with 'View All Discussions' permission also has 'Manage Discussions' permission, he can also perform the functions described for 'Manage Discussions' above.

  o NOTE: If the user with 'View All Discussions' permission only has 'View All Assigned Submissions' permission, he would only be able to view the discussion thread and participant summary on those submissions to which he has access (submissions to which he is assigned). If the user with 'View All Discussions' permission has 'View All Submissions' permission, he can view discussions on all submissions, even those where he has not been invited to participate in the discussion.

Edit Role Definition

Role Name: Editor-in-Chief

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

Expand All   Collapse All

⊞ New Submissions
⊞ Editor Assignment
⊞ Reviewer Invitations
⊞ Editor Decisions
⊞ Proposals/Commentaries
⊞ System Conversion Tasks
⊞ General Searching and Viewing
⊞ Edit Submission
⊟ Discussion Forums
　　☑ Manage Discussions
　　☑ View All Discussions

The 'Initiate Discussion' and 'Discussion' links are included in the Default Editorial Details layout. If the publication is using Custom Details layouts, Discussions must be added to the layout after upgrade using the 'Define Details Page Layouts' option in PolicyManager.

Request Additional Information for Other Authors

In prior versions of EM (pre-v7.3), Corresponding Authors could enter Other Authors on a submission. The information they could provide was limited, with only the First and Last Names required. Authors were limited to a single initial for Middle Initial, and publications could optionally request E-mail Address, but not require this field be filled in.

New in EM/PM v7.3, publications may configure a larger number of fields to be filled in by Corresponding Authors, and make these required if desired. Fields, such as 'E-mail Address', may be configured as "Required", "Hidden", or "Optional". The following is the complete list of fields that may now be requested at the Add/Edit/Remove Authors step. The "First Name" and "Last Name" fields are always required by EM, but all other fields may be Hidden, Optional, or Required:

- Title
- **First Name**
- Middle Name
- **Last Name**
- Academic Degree(s)
- Affiliation
- E-mail Address – *NOTE: At upgrade, the existing status is retained (either Optional or Hidden)*
- Position
- Institution
- Department
- Street Address
- City
- State or Province
- Zip or Postal Code
- Country

TO CONFIGURE:
The current 'Set Other Author Email Request' link under the Submission Policies section of PolicyManager is replaced by a new 'Set Other Author Parameters' link. This link opens the *Set Other Author Parameters* page. Configure the above fields as desired. These settings will apply to all Other Authors entered for new or revised submissions (or when a submission is edited).

NOTE: If you wish to use the new features described under *Require Other Author Confirmation and/or Registration* below to force Other Authors to validate their co-author status, then you should set the E-mail Address to be required, as this will be needed to contact the authors with validation requests.

Set Other Author Parameters

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

[Cancel] [Submit]

Other Author Parameters

Set "Title" Text Entry Box Preference:	Hidden ▾
First Name	Required
Set "Middle Name" Text Entry Box Preference:	Optional ▾
Last Name	Required
Set "Academic Degree(s)" Text Entry Box Preference:	Optional ▾
Set "Affiliation" Text Entry Box Preference:	Optional ▾
Set "E-mail Address" Text Entry Box Preference:	Optional ▾
Set "Position" Text Entry Box Preference:	Hidden ▾
Set "Institution" Text Entry Box Preference:	Hidden ▾
Set "Department" Text Entry Box Preference:	Hidden ▾
Set "Street Address" Text Entry Box Preference:	Hidden ▾
Set "City" Text Entry Box Preference:	Hidden ▾
Set "State or Province" Text Entry Box Preference:	Hidden ▾
Set "Zip or Postal Code" Text Entry Box Preference:	Hidden ▾
Set "Country" Text Entry Box Preference:	Hidden ▾

[Cancel] [Submit]

Require Other Author Confirmation and/or Registration

Some publications have requested that Other Authors identified on a submission confirm they are contributors on the submission. Other publications would like a way to require those Other Authors to register to enhance their Author or potential Reviewer database. New in EM/PM v7.3, publications may configure Article Types to require that Other Authors of a submission confirm that they are a contributor, and/or register with the publication in order to confirm their contributions. A new section is added to the *Edit Article Types* page called "Register/Verify Other Authors" with a drop-down box containing three choices:

- Only Corresponding Author must be registered
- Require Other Authors to verify that they are co-authors on the submission
- Require Other Authors to register and verify that they are co-authors on the submission

NOTE: If you want to use either of the options requiring Other Authors to verify their status, it is vital that you configure the "Notify Other Authors" Event in ActionManager with appropriate notification letters, as described below, so that co-authors know what they have to do to verify (and register if applicable).

Only Corresponding Author must be registered

"Only Corresponding Author must be registered" is the default setting at upgrade for every Article Type, and for any new Article Type. Current functionality (pre-7.3) in EM is unchanged if this option is selected, meaning that Other Authors may be entered by the Contributing Author, but those Other Authors are not asked to confirm their contribution.

Require Other Authors to verify that they are co-authors on the submission
If the "Require Other Authors to verify that they are co-authors on the submission" choice is selected, then when that Article Type is selected for a New or Revised submission, the following behavior occurs.

After an Author has entered all required information for a new or revised submission (or an Editor has edited a submission) and built the PDF, when the user clicks the 'Approve Submission' link, a new "Notify Other Authors" event is triggered (see 'To Configure' section below).

NOTE: If the submission is in the new 'Transferred Submissions' folder (see "Receive Transferred Submission from Another Publication" section of these Release Notes), the "Notify Other Authors" event will not be triggered until the 'Transfer Complete' Action Link is clicked.

NOTE: If the submission has been edited using the 'Edit the submission data only' link and Other Authors are added, the "Notify Other Authors" event will not be triggered. Editors will need to go to the 'Other Author Status' page to send the letter (see "View Other Author Information" section of these Release Notes for more information).

The e-mail letter associated with this event in ActionManager for Author Letters will be sent to all Other Authors entered on the submission, but not to the Corresponding Author. Two new merge fields are created for use in these Author letters:

- %OTHERAUTH_VERIFY_DEEP_LINK% - inserts a deep link that allows a co-author to respond "Yes, I am affiliated." When this deep link is clicked and the Article Type of the submission has "Require Other Authors to verify that they are co-authors on the submission" selected, the system is "flagged" that the person at this E-mail address has verified that they are a co-author (see "View Other Author Information" section of these Release Notes for more information).

- %OTHERAUTH_DECLINE_DEEP_LINK% - inserts a deep link that allows a co-author to respond "No, I am not affiliated." When the decline deep link is clicked the system is "flagged" that the person at this E-mail address has denied that they are a co-author (see "View Other Author Information" section of these Release Notes for more information).

Decline Contributor Verification	Thank you for taking the time to notify %JOURNALFULLTITLE% that you are not a Contributing Author on %ARTICLE_TITLE% submitted by %CORRAUTHOR%.

Other Authors will use the deep links generated by the two merge fields above to confirm or decline their affiliation with the submission. Upon clicking either link, the Other Author will be presented with a confirmation page to thank them for taking the time to verify or decline their role in the submission.

Editors will be able to track the information via a new page called 'Other Author Status' that can be accessed via the *Technical Check* page or the *Details* page for the submission. See the "View Other Author Information" section of these Release Notes for more information.

Require Other Authors to register and verify that they are co-authors on the submission
If the "Require Other Authors to register and verify that they are co-authors on the submission" choice is selected, then when that Article Type is selected for a new or revised submission, the following behavior occurs.

After an Author has entered all required information for a new or revised submission (or an Editor has edited a submission) and built the PDF, when the user clicks the 'Approve Submission' link, a new "Notify Other Authors" event is triggered (see 'To Configure' section below).

NOTE: If the submission is in the new 'Transferred Submissions' folder (see "Receive Transferred Submission from Another Publication" section of these Release Notes), the "Notify Other Authors" event will not be triggered until the 'Transfer Complete' Action Link is clicked.

NOTE: If the submission has been edited using the 'Edit the submission data only' link and Other Authors are added, the "Notify Other Authors" event will not be triggered. Editors will need to go to the 'Other Author Status' page to send the letter (see "View Other Author Information" section of these Release Notes for more information).

The e-mail letter associated with this event in ActionManager for Authors will be sent to all Other Authors entered on the submission, but not to the Corresponding Author. The same two merge fields are available (%OTHERAUTH_VERIFY_DEEP_LINK% and %OTHERAUTH_DECLINE_DEEP_LINK%) with the following change to the %OTHERAUTH_VERIFY_DEEP_LINK%:

- When the %OTHERAUTH_VERIFY_DEEP_LINK% deep link is clicked, the other author is brought to the existing Login page. The instructions on this page are those entered on the new *Edit Contributing Author Login Instructions* page.
  - The deep link is the mechanism used to associate the Other Author with a particular submission; therefore, even Authors already registered with the publication will need to use this link to verify their authorship.
  - After clicking the link, if the Author already has a people record with the publication, then they should log in with their existing Username and Password. The submission is then linked to the Author that logged in using the deep link in the e-mail. This connection works even if the Author logs in using an existing account with a different e-mail address, as the Corresponding Author may have entered an alternate e-mail address for the Author. Upon logging in, the Author is brought to the Author menu. See the "Changes to Author Main Menu and Folders" section of the Release Notes for more information.
  - If the Author has an existing registration record but does not know their username/password, then they should click the 'Send Username/Password' link. NOTE: In order to successfully complete the acceptance process, the Author will need to re-click the deep link in the e-mail after retrieving their username/password and successfully complete the login process.
  - If the Author does not have a registration record with the publication, then they should click the 'Register Now' link. The Other Author is navigated through the existing registration process and completes all required information (as configured for your publication). EM will pre-populate as many registration fields as possible from the information that was entered by the Corresponding Author when the paper was submitted. When registration is completed, the Author record is marked on the new Other Author Status page showing this Other Author as being registered and associated with this submission. See the "Changes to Author Main Menu and Folders" section of the Release Notes for more information.

Editors will be able to track the information via a new page called 'Other Author Status' that can be accessed via the *Technical Check* page or the *Details* for the submission. See

the "View Other Author Information" section of these Release Notes for more information.

NOTES:
1. When a submission is revised, any newly added Other Authors will receive the e-mail letter. Authors whose details are unchanged and Authors whose records are modified but not deleted or added do not receive the letter a second time.
2. If the Corresponding Author or an Editor edits the submission and changes the Article Type from one that does not require Other Author Verification (or Registration) to an Article Type that requires either Verification or Verification and Registration, then the configured letters will be sent when the "Notify Other Authors" Event is triggered.
3. If the Article Type is reconfigured to require either verification or registration and verification after a submission has been received (includes submissions received before upgrade to v7.3), the Other Authors will not be notified unless the submission is edited and the PDF is rebuilt, though they will be listed on the Editor's view of the *Other Author Status* page, where the Editor can choose to send letters to those of whom verification has not yet been requested.
4. Should an Other Author need to change their response, the Editorial Office will need to reset their status on the *Other Author Status* page.

TO CONFIGURE:
The existing *Edit Article Type* page in PolicyManager is enhanced with the new '"Register/Verify Other Authors" with a drop-down box containing three choices:
- Only Corresponding Author must be registered
- Require Other Authors to verify that they are co-authors on the submission
- Require Other Authors to register and verify that they are co-authors on the submission

Select which existing Article Types you wish to modify, and select one of the new options from the drop down. The default value at upgrade for existing Article Types and any new Article Types is 'Only Corresponding Author must be registered'.

NOTE: If you choose to use the use the new feature, you must configure the 'E-mail Address' to be required for Other Authors. See the "Request Additional Information for Other Authors" section of these Release Notes for more information.

A new 'Edit Other Author Login Instructions' link is added to the 'Registration and Login Policies' section of PolicyManager. This link opens the *Edit Contributing Author Login Instructions* page. Enter instructions on this page that you wish to display for Other Authors who are required to register with your publication and confirm their contribution to a submission.

Edit Contributing Author Login Instructions

Enter any instructions that you would like to appear when the Contributing Author Login page is displayed.

[Cancel] [Submit]

Area	Instructions
Login Header Text	Insert Special Character
	You have been identified as a contributing author on a submission. This Publication requires that you have an account. If you already have an account with this Publication please login:
View Default Instructions	Revert to Default Instructions
Login Footer Text	Insert Special Character
	If you do not already have an account, please click the 'Register Now' link. If you already have an account but cannot remember your information, please click the 'Send Username/Password' link.
View Default Instructions	Revert to Default Instructions

[Cancel] [Submit]

A new "Notify Other Authors" event is added to the ActionManager page. This event does not trigger a status change; the 'New Document Status' value is hard-coded to "No Change". Letters may be configured to be sent when this Event is triggered for Authors, Editors, and Publishers. Reviewer Roles may not be configured to receive letters for this event.

When this event is triggered:
1. The letter configured to be sent to the Author role is sent to all Other Authors associated with the submission who have not yet received letters or who received letters but have not yet responded. No letter is sent to the Corresponding Author.
2. If letters are sent to any Other Authors, letters configured to be sent to any Editor or Publisher roles are sent to all users with that role. Note: Editor and Publisher recipients receive one letter per event, not one letter for each Other Author notified.

Partial page display – ActionManager, Author Letters

Editor Receives Submission

Event	Author Letters
New Submission Sent to Publication	Author Submits New Manuscript Confirmation
New Child Submission Sent to Publication	NONE
Revised Submission Sent to Publication	Author Submits Revision Confirmation
Submission Transferred to Publication	NONE
Notify Other Authors	Other Authors - Request Confirmation
Editor - Remove Submission	NONE

View Other Author Information

New in EM/PM v7.3, publications may configure Article Types to require that Other Authors of a submission confirm that they are a contributor, or even register with the publication to confirm their contributions. Other Authors are notified using a letter (created in PolicyManager and configured in ActionManager for the event 'Notify Other Authors') that contains two deep links: one to confirm and one to decline the affiliation.

For submissions where the Article Type has been configured with either the new 'Require Other Authors to verify that they are co-authors on the submission' option or the new 'Require Other Authors to register and verify that they are co-authors on the submission option' and where there is at least one Other Author associated with the submission, a new 'Other Author Status' link displays on the *Technical Check* page and in the 'Other Authors' section on the default Editorial *Details* layout. This link is visible to all Editors, though the layout of the page reached via this link depends on the new 'Manage Other Authors' permission (see below).

Partial Technical Check page displayed

Sample Details page layout:

Clicking the 'Other Author Status' link opens a pop-up window that displays any Other Authors listed for the submission and their current confirmation status. The display is slightly different for Editors with the new 'Manage Other Authors' permission (detailed below).

When the Article Type is configured to require Author Confirmation only, the Author Name is a link that, when clicked, opens a *View Author Detail* pop-up window displaying the information entered by the Corresponding Author for the Author.

When the Article Type is configured to require Author Registration, and the Other Author has clicked the verification deep link and registered with the publication to confirm their association with the submission, then the Author Name links to the *People Information* page for the Author.

In addition to the display order, Author Name, Academic Degree(s), and Affiliation, the table displays the Status of the Other Author confirmation. For each Author, one of the following statuses will display:

A. Yes (Registered)
   - If the Article Type requires registration and the Other Author has registered to verify their contribution
B. Yes
   - If the Article Type does not require registration and the Other Author has verified their contribution
C. Declined

- If the Article Type requires either verification or verification with registration and the Other Author has declined association with the submission
  D. No Response
- If the Article Type requires either verification or verification with registration and the Other Author has not yet responded to the request for verification/registration
  E. Confirmation Not Requested
- The current Article Type requires either verification or verification with registration, but the Other Author has not yet been asked to verify their contribution. This may occur if the submission's Article Type configuration was changed to require verification or verification with registration after the paper was submitted, or after the Other Author was added to the submission. This may also be the case when an Other Author is added using the "Edit without rebuilding PDF" option.

In addition, if the Other Author has responded (either confirmed or declined), the date of the response is shown in the publication-configured date format.

Sample Page – not all statuses shown:

Other Author Details for Manuscript Number: Unassigned
"News Item to Test the News."

Close

Other Author Status

Order	Author Name	Academic Degree(s)	Affiliation	Confirmed?
2	Anthony Author, PhD	PhD	Duke Medical School	Yes (Registered) Sep 19 2009 4:19PM
3	Frankie Avalon		Harvard Medical School	Yes (Registered) Sep 23 2009 11:03AM
4	George Jetson, PhD	PhD		**Declined** Sep 20 2009 4:19AM
5	Edward Albert, MBA	MBA	École des Garçons Δζ	Confirmation Not Requested
6	Simple Simon			No Response

Close

If the logged in Editor has the new 'Manage Other Authors' permission enabled, another column displays on the right hand side of the page. This column will hold the following links (as applicable):

A. Reset Confirmation Status

- This link displays if the Author has already responded to the verification request. Editors may use this link to reset the confirmation to 'No Response', allowing the Author to change their response.

B. Resend Letter
- This link displays if an e-mail letter has been sent to this Other Author, but they have not yet responded, or if the Editor has reset the response status. Clicking the link sends a new letter to this recipient only.

C. Request Confirmation
- This link displays if for any reason a notification has not yet been sent to this Other Author. Clicking the link sends the e-mail letter configured for the Author role at the 'Notify Other Authors' event to this recipient, and any letters configured to be sent at this event to Editor or Publisher roles.

D. View Other Author Details
- This link displays for all Other Authors and links to the *View Author Detail* page for that Other Author.

If there are multiple Authors from whom confirmations have not been received, the Editor may use the "Resend Letters" button at the bottom of the page to re-trigger the 'Notify Other Authors' event. Letters configured for the event will be sent to any Other Authors who have not responded, as well as any Editor or Publisher roles configured to receive letters at this event.

Other Author Details for Manuscript Number: Unassigned "News Item to Test the News."

Close

Other Author Status

Order	Author Name	Academic Degree(s)	Affiliation	Confirmed?	
2	Anthony Author, PhD	PhD	Duke Medical School	Yes (Registered) Sep 19 2009 4:19PM	Reset Confirmation Status View Other Author Details
3	Frankie Avalon		Harvard Medical School	Yes (Registered) Sep 23 2009 11:03AM	Reset Confirmation Status View Other Author Details
4	George Jetson, PhD	PhD		**Declined** Sep 20 2009 4:19AM	Reset Confirmation Status View Other Author Details
5	Edward Albert, MBA	MBA	École des Garçons Δζ	Confirmation Not Requested	Request Confirmation View Other Author Details
6	Simple Simon			No Response	Resend Letter View Other Author Details

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

Resend Letters

Close

TO CONFIGURE:

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See the "Require Other Author Confirmation and/or Registration" section of these Release Notes for information on configuring Article Types.

To allow Editors enhanced functionality on the new page, go to RoleManager and select the desired Editor role. The new "Manage Other Authors" permission is added to the 'Edit Submission' section. This permission allows Editors to manage certain aspects of the Other Author records on the new *Other Author Status* pop-up window. The *Other Author Status* pop-up window is only accessible on submissions where the Article Type has either the new "Require Other Authors to verify that they are co-authors on the submission" or the new "Require Other Authors to register and verify that they are co-authors on the submission" option activated. Therefore, enabling this permission has no impact on submissions where the Article Type does not have either of the new options chosen.

Changes to Add/Edit/Remove Authors step on Submit Manuscript

The format of the Add/Edit/Remove Authors step for a manuscript is modified in EM/PM v7.3. The format is changed to accommodate the gathering of more information about the Other Authors of a submission. The modifications apply to New Submission, Revised Submission, Edit Submission, and Create Submission.

New Submission

Frequently Asked Questions

✓ Select Article Type
✓ Enter Title
➡ Add/Edit/Remove Authors
  Enter Keywords
  Select Classifications
  Enter Comments
✓ Request Editor
  Attach Files

Please Add, Edit, or Remove Authors

Enter the names of anyone who contributed to your manuscript by clicking 'Add Author'. The first author of the manuscript may be indicated. The order of the authors can be changed by entering the desired numeric order in the text boxes and clicking the 'Update Author Order' button. To make a different Author the Corresponding Author, click the 'Edit' link next to the Author row on the grid. You may also Edit or Remove authors from the grid below, or view the Author information by clicking the appropriate link.

An * next to the 'Edit' link means there is missing required data for that Author.

Add Author

Previous   Next

Order		First Name	Middle Name	Last Name	Academic Degree(s)	Affiliation	E-mail Address	
1	First Author **Corresponding Author**	Kermit	The	Frog			bhopkins@ariessys.com	View
2		Zebediah		Author	MD, LMNoP			View Remove Edit
3		Sandra		Smith	PhD		bhopkins@edmgr.com	View Remove Edit*

Update Author Order

1. The page is re-labeled "Please Add, Edit, or Remove Authors"
2. The displayed text is from the Add/Edit/Remove Authors / 'New Submission Instructions' section of the *Edit Manuscript Submission Instructions* page,
3. The 'Add Author' button opens a new pop-up window for adding Author information (see below)
4. The Author grid still shows all Authors associated with this submission, but it is modified.
   a. The order arrows are removed and replaced by a new "Order" column. Users may use the boxes in this column to re-number the display order of Authors by entering and the desired display rank and clicking the new 'Update Author Order' button.
   b. The Author with "1" in the 'Order' box has the label of "First Author". NOTE: As with existing functionality, the First Author does not need to be the Corresponding Author of the submission.
   c. The last column contains three links:
      i. View: This link opens a window displaying any entered Author-related information.

View Author Detail

| Close | Edit |

Title*	
First Name*	Sandra
Middle Name	
Last Name*	Smith
Academic Degree(s)*	PhD
Affiliation	
E-mail Address*	bhopkins@edmgr.com
Street Address	
City	
State or Province*	
Zip or Postal Code	
Country*	

| Close | Edit |

   ii. Remove: This link is not available for the Author listed as "Corresponding Author" but is available for all Other Authors.

  iii. Edit: Clicking this link opens a pop-up where information may be edited. If there are any missing required fields for an Author, an asterisk (*) will show next to the Edit link in the grid

When the Corresponding Author clicks the 'Add Author' button, a new pop-up displays with all the fields configured on the *Set Other Author Parameters* page in PolicyManager.

Only First Name and Last Name are always required. All other fields may be set to be Optional or Required by the publication. Required fields display in red text with an asterisk (*). The page may not be submitted without a First and Last Name, however other Required fields may be left blank and filled in at a later time. All required fields must be filled in before the submission PDF can be built.

Example of all fields set to 'Optional' for Other Authors:

Add/Edit Authors

Enter the names of anyone who contributed to your manuscript by entering all required information and clicking the 'Submit' button. To add multiple contributors, click the 'Submit and Add Another Author' button. To change the corresponding author, enter the new corresponding author's name in the text boxes, click the check box labeled 'Please select if this is the corresponding author', and click the 'Submit' button.

An * indicates the field is required. First and Last Names must be entered to submit this page. Any other required fields must be entered before the manuscript can be submitted.

Click 'Cancel' to return to the Submit New Manuscript page without adding an author.

[Cancel] [Submit] [Submit and Add Another Author]

Insert Special Character

First Name*	
Middle Name	
Last Name*	
Academic Degree(s)	
Affiliation	
E-mail Address	
Position	
Institution	
Department	
Street Address	
City	
State or Province	
Zip or Postal Code	
Country	Please choose a country

Please select if this is the corresponding author ☐

[Cancel] [Submit] [Submit and Add Another Author]

TO CONFIGURE:
The new pop-up format is automatically modified at upgrade to v7.3. The fields that display for the Author to enter are configured in PolicyManager, 'Set Other Author Parameters' page. See the "Request Additional Information for Other Authors" section of these Release Notes for more information.

There are now two sets of instructions for this step: The existing 'Add/Edit/Remove Authors' instructions still appear on the main page. A new set of instructions called 'Add/Edit Authors popup window' are added to the *Edit Manuscript Submission Instructions* page in PolicyManager. New default instructions are added, though these instructions may be customized if desired. Instructions entered in this section on PolicyManager will display on the Add Author pop-up page.

Changes to Author Folders

New in EM/PM v7.3, publications may configure Article Types to require that any Other Authors of a submission must register with the Publication to confirm that they are a contributing Author. When an Other Author successfully registers/logs in to confirm their contribution to a submission, they will now be given access to view the status of the submission as it goes through the editorial process.

1. Submissions for which the logged-in Author served as an Other Author are now included in their *Submissions Being Processed*, R*evisions Being Processed*, and *Submissions with a Decision* folders (where the submission's Article Type requires Other Authors to register and the logged-in Author has successfully done so).
2. A new "Authorship" column is added to these folders to display the current user's relationship to the submission ("Corresponding Author" or "Other Author").
   a. The new column is displayed in these three folders only if the currently logged-in Author is associated with at least one submission as a registered Other Author. If the Author is associated with at least one submission as a registered Other Author, the column displays in all three folders, even if they do not contain the submission for which the Author was an Other Author.

Sample of Submissions Being Processed folder:

Submissions Being Processed for Author Mary François Smith, PhD

Page: 1 of 1 (3 total submissions) Display 10 results per page.

☐ Action ▲	Manuscript Number ▲▼	Title ▲▼	Authorship ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼
View Submission	TONYTEST50-D-06-00001	Testing 1 2 3	Other Author	Apr 11 2007 12:58PM	Dec 12 2007 3:56PM	Under Peer Review
View Submission View Other Author Status Send E-mail		Beating Winter Doldrums	Corresponding Author	Mar 18 2007 1:28PM	Mar 18 2007 1:28PM	Received by Journal
View Submission View Reference Checking Results View Proposal View Invitation Letter Send E-mail	TONYTEST50-D-06-00030	All The World's a Stage	Corresponding Author	Apr 11 2006 11:58AM	Jan 21 2008 2:02PM	Decision in Process

Page: 1 of 1 (3 total submissions) Display 10 results per page.

<< Author Main Menu

A new permission called "View Other Author Status" is added to the Author RoleManager page. When this permission is enabled, Authors see a new 'View Other Author Status' Action Link (when applicable) that leads to the Author version of the *Other Author Status* page (see "View Other Author Information" section of these Release Notes for more information on that page).

This new Action Link displays for Authors when this new permission is enabled for the Author Role and:

1. The logged in user is the Corresponding Author on the submission
2. There are Other Authors on the submission, and at least one of them has been notified that verification of their contribution is required.

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3. The submission's current Article Type is configured to either require co-author verification or co-author registration

Clicking the link opens the Author's view of the *Other Author Status* page.

The Author Names are links to the *View Author Detail* page for each Other Author, where the Corresponding Author may see the information they entered for each Other Author when submitting their paper.

TO CONFIGURE:
To allow Authors to see this link (under the specified conditions), go to RoleManager, Author Role, and select/check the new "View Other Author Status" permission.

Allow Authors to View Correspondence History

Throughout the submission process, letters are sent to the Author regarding the submission, from the notification that the PDF is built and ready to be approved through to the point that the Author is notified of an Editor's decision. New in EM/PM v7.3, publications may allow Authors permission to view any correspondence to or from the Author related to a submission.

If your publication chooses to enable the feature, all Authors are given access to a *Correspondence History* page, similar to the one currently available to Editor and Publisher roles. The Author's *Correspondence History* page lists only those letters sent to or from the Author via the system, or those sent outside the system but added manually through the *Add External Correspondence* page and made available to Authors via a new checkbox. Such letters include:
- Any letter where the Author is the recipient, including production task assignment letters and letters related to Commerce Manager such as Payment Due letters.
- Any 'Ad Hoc From Author' letter sent by the Author.
- The 'Submit Task' letter sent by the Author.
- External correspondence added manually by the Editor that is marked 'Display in Author's Correspondence History'.

Authors will see a 'Correspondence' Action Link in most of the folders displayed on their Main Menu.

NOTE: The new 'Correspondence' link is NOT added to the following two folders:
- *My New Invitations* folder - the invited Author is not yet the Corresponding Author. The invited Author has visibility to the invitation letter via the 'View Invitation Letter' link in this folder.
- *My Accepted Invitations* folder - invitation letters are only ever associated with the parent submission, and not the child submission that is created from the invitation.

NOTE: If a particular submission does not have any Author correspondence, the 'Correspondence' link is suppressed for that submission. This is only likely to ever happen in the *Incomplete Submissions* folder.

When this link is clicked, a pop-up window will display to the Author displaying all letters sent to or from the Author regarding this submission. Letters are displayed in date order (newest on top), but can be sorted using the standard sort arrows.

TO CONFIGURE:

To enable this feature for the Author role, go to RoleManager, Author role, and check/select the 'View Author Related Correspondence History' permission. All relevant historical correspondence will display to the Author when this feature is enabled.

Designate External Correspondence to Display to Authors

Editors may be given permission to manually add External Correspondence entries (an item of correspondence, such as an E-mail, received outside of the EM/PM system) to the Correspondence History of a submission, where they can be viewed alongside EM/PM-generated Internal Correspondence. New in EM/PM v7.3, Editors may also designate these entries to be made available to Authors in the Author's *History* page.

When a Publication has enabled the new 'View Author Related Correspondence History' permission for Authors (see 'Allow Authors to View Correspondence History' section above), Editors with the existing 'Add/Edit External Correspondence' permission enabled will see a new 'Display in Author's Correspondence History' option on the 'Add/Edit External Editorial Correspondence' page.

When the box is checked/selected for a piece of external correspondence, and the publication has enabled the 'View Author Related Correspondence History' permission for Authors, then the External correspondence will display for the Author on their *History* page. The item will be marked with (External) to denote this message as having been added manually.

History for Manuscript Number: Unassigned, DOI: Unassigned
Hermione Grainger (BOLIVIA, PLURINATIONAL STATE OF): "Testing the requirement of Other Authors to Register 1/5/10"

Close

Correspondence History

Correspondence Date ▲▼	Letter ▲▼	Recipient ▲▼	Revision ▲▼
Feb 23 2010 03:01PM	Checking on Status (External)	Journal Office	
Jan 05 2010 02:20PM	PDF Built and Requires Approval	Hermione Grainger	0
Jan 05 2010 02:19PM	Author Notice Editor Made Changes to Submission	Hermione Grainger	0
Jan 05 2010 02:17PM	Commerce Manager - Fee Due	Hermione Grainger	
Jan 05 2010 02:17PM	Author Submits New Manuscript Confirmation	Hermione Grainger	0
Jan 05 2010 02:05PM	PDF Built and Requires Approval	Hermione Grainger	0

Close

TO CONFIGURE:

See the 'Allow Authors to View Correspondence History' section above for information on enabling the new 'View Author Related Correspondence History' permission for Authors. Once enabled, then Editors with the existing 'Add/Edit External Correspondence' permission enabled will have the new 'Display in Author's Correspondence History' option on the 'Add/Edit External Editorial Correspondence' page.

Reviewer Selection Summary Page Enhancements

At times, an Editor may need to add or remove classification terms associated with a submission while working in the Select Reviewer section of the system. In EM/PM v7.3, Editors with the "Assign Manuscript Classifications" permission enabled in RoleManager will see a 'Classifications' link on the *Reviewer Selection Summary* page that opens the *View/Modify Submission Classifications* page for the submission.

An Editor may also decide to move ahead with making a decision on a submission after viewing the information on the *Reviewer Selection Summary* page. For any Editor that has RoleManager permission to make a decision, is in the decision chain for the submission, and has not yet made a decision on the submission, a "Submit Editor's Decision and Comments" link now appears on the *Reviewer Selection Summary* page to open the *Editor Decision and Comments* page.
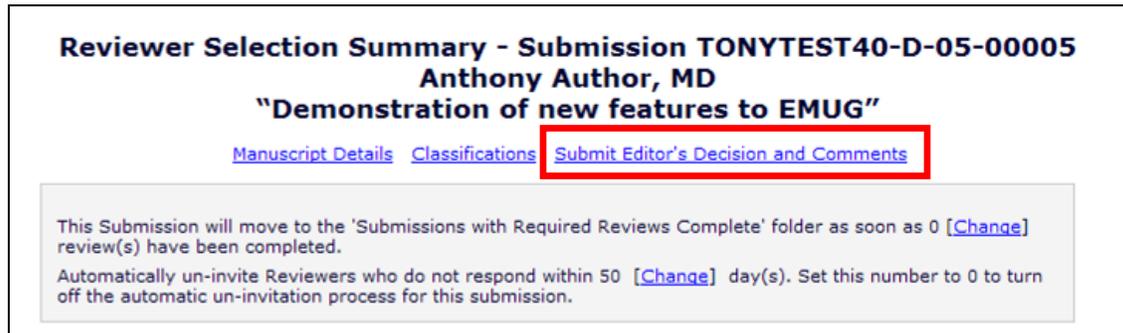
TO CONFIGURE:
No additional configuration required. Editors with proper permissions described will see the links where applicable.

Search on Submission Flags

In EM/PM, submission flags may be defined on the *Create Customized Flags* page on PolicyManager. Once defined, users with proper permission may turn each flag "on" or "off" on a submission-by-submission basis on the *Details* page.

New in EM/PM v7.3, Editors may search on Submission Flag Names in Search Submissions. A 'Submission Flag Name' option is added to the Search Submission criteria page for users with 'View Submission Flag' permission enabled. When selected in the Criterion drop-down, the 'Selector' field automatically updates with the value 'Equal To', and the 'Value' field updates with a drop-down of all available Submission Flags configured for your publication.

TO CONFIGURE:
No configuration required. Editor Roles with proper permissions enabled will see the new option in the Search Submissions, Search Proposals, and Linked Submissions search pages.

Background Changes to E-Mail Processing

In EM/PM v7.3, background changes have been made to the way E-mail letters are generated, sent and stored. These changes are intended to improve security and performance, and to make it easier to introduce new functionality in future releases.

Although the majority of these changes are invisible to the end-user, there are some minor changes that you should be aware of:

- **Username and Password Security:** Prior to version 7.3, only the %BLINDED_USERNAME% and %BLINDED_PASSWORD% merge fields would be blinded when editing or viewing letters. In version 7.3, all Username and Password merge fields will be blinded in letters when displayed to anyone other than the Primary recipient. The way EM/PM stores E-mail letters has also been modified so that Usernames and Passwords are no longer stored in plain text in database tables. Only the Primary recipient of the letter will see their Username and Password in plain text.

- **Deep Link Security:** Deep links will now be blinded and disabled in the 'cc' version of all letters and in copies stored in the Correspondence History. Only the Primary recipient of the letter will see and be able to use a Deep Link.

- **New Links Generated on Re-Sending:** When re-sending correspondence containing a Deep Link to the original recipient, a replacement, active Deep Link is generated which has a new expiry date and/or click limit according to your configuration, as the original link may have expired.

- **Changes to Merge Field Display when Customizing Letters:** To support the enhancements to Username, Password and Deep Link security, these merge fields will now always display the merge field code (e.g. %PASSWORD%, %BLINDED_USERNAME%) when users are editing letters. This mainly affects the display of Deep Links and non-blinded Username and Password fields, which in some cases prior to version 7.3 would be merged into the editable version of the letter as plain text.

- **Changes to cc: Functionality:** Prior to version 7.3, 'carbon copy' (cc:) versions of E-mail letters were generated using standard mail-server cc: functionality. Such server-generated letters cannot be made anonymous by EM/PM. This is changed in version 7.3 so that EM/PM now generates all cc: letters as individual E-mail letters direct to the cc: recipients. To make it clear that a message has been carbon-copied, the system now inserts standard 'cc: notification' text into each message that reads:

  "You are being carbon copied ("cc:'d") on an E-mail "To" [Original Recipient].

  CC: [List of all cc: recipients]".

The "CC: [List of all cc: recipients]" text is also inserted into the beginning of the original E-mail letter sent to the Primary recipient. Note that this is not a *blind* carbon copy (bcc:); the Primary recipient and all cc: recipients are informed of the identity of all cc:'d recipients.

- **CC: Recipients with non-E-mail Preferred Methods of Contact:** If a Primary recipient is currently configured with a 'Preferred Method of Contact' other than E-mail, the system will forward the E-mail letter to the address specified in the 'Set Non-Email "Preferred Method Of Contact" Correspondence Email Address' page in PolicyManager. In this case, the system inserts standard text asking the forwarding recipient to print the message out and send to the Primary recipient via their preferred method of contact. In some cases prior to version 7.3, this would not work with cc:'d recipients who had a non-Email preferred method of contact. With version 7.3, the system now checks this setting for each individual cc: recipient, and if appropriate, forwards their cc:'d copies to the address configured for the publication, inserting 'Please forward' text with their contact details.

TO CONFIGURE:
No configuration is required to support the enhancements to E-mail processing. These changes will be made to the system automatically on upgrade to version 7.3.

'Set Merge Field Blinding Policy' Page Removed

As a result of the improvements to mail-merge security (outlined in the 'Background Changes to E-Mail Processing' section of this document), all Username and Password fields are considered equally sensitive and will be blinded during editing and preview of letters before they are sent and when viewed in *Correspondence History*.

The 'Set Merge Field Blinding Policy' page is therefore no longer necessary, and is removed as of version 7.3.

Note that the %BLINDED… versions of these login information fields will continue to prefix the merged information automatically with the text 'Your Username is:' or 'Your Password is:' as appropriate, while the other versions of the login fields do not. To preserve current correspondence behavior, the system will automatically check the letter templates on upgrade and will change the merge codes in use to match the pre-7.3 configuration as follows:

- If the "Replace the %USERNAME% merge field with %BLINDED_USERNAME% in all letter templates" setting is *enabled*, then all instances of "%USERNAME%" and "%USR%" in configured letter templates will be replaced with "%BLINDED_USERNAME%". If the setting is *disabled*, then no changes will be made to Username merge fields in letters.

- If the "Replace the %PASSWORD% merge field with %BLINDED_PASSWORD% in all letter templates" setting is *enabled*, then all instances of "%PASSWORD%" and "%PWD%" in configured letter templates will be replaced with "%BLINDED_PASSWORD%". If the setting is *disabled*, then no changes will be made to Password merge fields in letters.

TO CONFIGURE:
No configuration is required. This will be carried out automatically on upgrade to version 7.3.

New Author Merge Fields for Bibliographic Search

Two new merge fields are introduced in EM/PM v7.3 for use in Third-party Bibliographic Searching:

- **%CORRAUTHOR_LFM%** - Inserts the Corresponding Author name using the Last Name, First Name and Middle Name fields, in that order, without the Title field

    1. If there is no middle name, only Last Name and First Name are inserted
    2. If there is a full middle name in the database, the merge code will insert the full middle name (not just the middle initial)

- **%CORRAUTHOR_LASTNAME%** - Inserts only the Last Name of the Corresponding Author

TO CONFIGURE:
Contact your Aries representative or Account Coordinator. They can create Third-party Bibliographic Searches that will take users from EM/PM directly to third party bibliographic databases (e.g. Ovid, SCOPUS, PubMed, etc) or search engines (Yahoo, Google, etc.) and include the new name formats in the search via merge fields. Once configured for your publication, go to RoleManager, and enable the appropriate search(es) for the desired roles. Users with the search enabled can then click the search link from various pages in the system and be taken directly to the external site.

NOTE: The %CORRAUTHOR_LFM% and %CORRAUTHOR_LASTNAME% merge fields are only available for use in bibliographic searches (i.e. they cannot be used in letters).

Cross Publication Reporting – Custom Report Views

Customers with multiple publications on EM/PM have expressed a desire to create reports that return data from more than one publication. New in v7.3, EM/PM adds support for reporting across all EM/PM sites associated with a single Business Publisher.

NOTE: The sites do not need to be in an Inter-Journal Resource Sharing (IJRS) linked group to use the feature.

When Cross-Publication Reporting is enabled for a set of publications, a new permission is added for Editor roles called 'Run Cross-Publication Reports'. When this permission is enabled, the existing custom report views are enhanced with a new 'Cross-Publication Report – All Publications' checkbox on the existing custom report selection criteria page.

If a report is run with the checkbox unchecked/unselected, the report runs against the 'current' publication (where the user is logged in). If a report is run with the checkbox selected/checked, the report runs against all publications associated with that publisher.

A new "Publication Code" field is added to the list of output fields for all custom report views. This field holds the journal code associated with the result row.

Partial Display of Fields listed on Editors & Submission view:

When a report is run across multiple publications, the Publication Code field displays in the result set even if it was not selected. This is to assist the user in determining which rows of data apply to which publication. If the user is running a saved report that was saved as cross-publication, or if the user returns to this page after having run a cross-publication report, the field is default selected and not editable by the user.

Partial Display of Fields listed on Manuscript Status History:

The cross-publication checkbox selection is stored when a cross-publication report is saved. If a cross-publication report is selected to be run, but the journal no longer uses cross-publication reporting or the user no longer has permission to 'Run Cross-

Publication Reports', the report will be run against the single journal database the user is logged into.

Any existing saved reports can be run cross-publication, by selecting them from the Report drop-down list on the main Custom Report page and selecting the new 'Cross-Publication Report – All Publications' checkbox.

NOTE: Results are limited to sites on EM Version 7.3 and up.

TO CONFIGURE:
This feature is available only for publishers with 50 or fewer publications using EM/PM. To enable this feature for your publications, contact your Aries Customer Service representative. Once enabled, any Editor roles with the new 'Run Cross-Publication Reports' RoleManager permission on *any* of the Business Publisher's publications can run a cross-publication report across *all* publications associated with that Business Publisher.

Transfer a Submission to Another Publication

New in EM/PM v7.3, publications that use Inter-Journal Resource Sharing (IJRS) may now use a new Cross-Publication Submission Transfer feature to transfer a submission from their publication to another. There may be times when a manuscript is submitted to a larger main publication within an IJRS-linked group, and while it is worthy of publication it may not be a good fit for that particular publication; it may be a better fit at a smaller "sister" publication. This new feature allows IJRS-linked journals to transfer submissions (including submission files and metadata) from one Editorial Manager site to another.

NOTE: The Inter-Journal Resource Sharing (IJRS) feature is designed for organizations wishing to share resources between groups of related journals or publications. Individual journals can create and maintain a resource-sharing relationship with other journals. This is referred to as a 'journal-group'. People information (Username, Password, Contact Information, etc.) subsequently passes between journals subject to the cooperation rules defined by the journals. Exceptions can be made at the individual journal level, if a person wants to maintain different contact information at different journals in the group.

IJRS linked journals wishing to use the Transfer Submission feature first need to enable the feature in AdminManager on the new 'Configure Cross-Publication Submission Transfer' page. Once this feature is enabled, Editors can transfer a submission by setting the Final Disposition to "Transfer" and selecting a recipient publication from a list of publications in the IJRS-linked group that also have the transfer feature enabled.

NOTE: This Final Disposition option is only available if there are no open assignments associated with the submission (including Reviewer or Editor assignments, Author invitations, or if production has been initiated).

NOTE: If a submission is transferred before it is assigned to an Editor (before a Manuscript Number was assigned), the source files will be deleted from the sending publication upon successfully transferring the submission. This is done because the submission has not been through any editorial process, and is in effect being removed or withdrawn from the sending publication.

When an Editor determines that a submission is better suited for another (IJRS-linked) publication and there are no open assignments related to the submission, the Editor will click the 'Set Final Disposition' link for the submission. A new 'Transfer' option displays in the drop-down menu.

When the 'Transfer' option is selected, the page refreshes to display a drop-down with all publications in the IJRS group that have the 'Transfer' feature enabled. The Editor must choose a publication from the list before he can proceed to customize letters.

NOTE: As part of the Transfer process, the recipient publication's people records will be checked to confirm that the Corresponding Author can be identified and has contact information. If the Author cannot be positively identified in the recipient publication, a warning message is displayed to the transferring Editor and the transfer is not completed. If the Author can be identified, the transfer proceeds with the identified person's record automatically associated with the submission as the Corresponding Author in the recipient publication.

After selecting a recipient publication and clicking the 'Proceed' button, the Editor is brought to a 'Transfer Submission - Customize Letters' page, where the Editor can customize any letters associated with the Transfer. The Customize Letters page displays the following sections:

- Transfer Letter: When a submission is transferred to another publication, a Transfer Letter will be sent with the transferred submission and placed in the 'History' of the submission in the recipient publication (this letter is not delivered to anybody; it is only placed in 'History' in the recipient publication). This letter is intended to communicate any information that may be of use to the recipient publication. For example, the Transfer Letter may be customized to include a copy of the most recent Decision Letter (if applicable) via the %DECISION_LETTER% merge field. NOTE: A default Transfer Letter is automatically added to publications that enable the 'Transfer' feature (see below for information on configuring the feature in AdminManager). The Letter may be edited in 'Edit Letters', but may not be removed.

- Others Notified at Final Disposition – Transfer: When letters are configured for the new event "Final Disposition – Transfer" in ActionManager (see below for information on configuring ActionManager) this section displays any letters configured for the Corresponding Author, any Reviewers that were invited to review any revision of the submission, and Editors in the editorial chain for all revisions of this submission.

After the Editor is done customizing letters and clicks the 'Confirm Transfer and Send Letters' button, a confirmation page will display, and the submission will be transferred to the recipient publication.

A submission has been transferred before having a Manuscript Number:

Set Final Disposition Confirmation for "Testing Submissions being Processed Folder"

The final disposition has been set to **Transfer.**

The submission has been sent to DEMO73B - Demo 7.3 Site B.

Files associated with this submission will be deleted from your database after successful transfer is confirmed, but you may still view the metadata in the appropriate Final Disposition folder on your main menu.

Return to New Submissions
Return to Main Menu

Close

A submission has been transferred after having a Manuscript Number:

Set Final Disposition Confirmation for Manuscript Number INFORM-2009-3

The final disposition has been set to **Transfer.**

The submission has been sent to *JAI - Journal of Artificial Intelligence.*

Return to View All Assigned Submissions
Return to Main Menu

Close

If there are any errors during Transfer, the sending publication will receive a notice at the e-mail address configured on their 'Configure Cross-Publication Submission Transfer' page (see below for information on configuring this page).

If the transfer is successful, the sending publication will see transfer information on the *Details* page for the submission. The new "Transferred" Final Disposition Term will display, and a new 'Transfer Information' section will display at the bottom (on the default Editorial Detail layout) containing the name of the publication to which the submission was transferred.

No Reviewers have been proposed by any Editor for this submission.

Author(s) Invited to Submit Commentary

No Authors have been invited to this manuscript.

Transfer Information	
Transferred to:	INFORM - Journal of Information Architecture

Cancel   Save and Close

The 'Transfer Information' section can be added to custom *Details* as well, and will only display if the submission has been transferred. If there is no information, the section is suppressed.

A new folder is added to the Editor Main Menu in the 'Submissions with Decisions' section called 'All Submissions with Final Disposition: Transfer'. This folder displays all submissions where the Final Disposition has been set to 'Transfer' but is suppressed if

there are none. When the Final Disposition of a submission is set to "Transfer", the status is changed to 'Submission Transferred'.

In addition to the Action Links that normally display for submissions in the 'Final Disposition' folders, a new 'Resend Transfer' Action Link displays in the 'All Submissions with Final Disposition' folder and the 'Transfer' sub-folder for submissions with a Final Disposition of Transfer if the user has "Set Final Disposition" permission enabled. This link may be used to resend a submission in the event that there is an error when the initial transfer is executed.

NOTE: The link will not appear if the source files have been deleted (where the submission was transferred before a manuscript number was assigned).

When the user clicks the link, they are asked to confirm that they would like to resend the submission files and metadata. Upon clicking 'OK', the Transfer to the original recipient publication is retried, including the Transfer Letter and the notification of transferred

submission received (sent to the e-mail configured on the *Configure Cross-Publication Submission Transfer* page; see 'To Configure' section for more information). The "Final Disposition – Transfer" event is not triggered, however, and none of its associated letters are sent (since they were already sent once).

NOTE: Publications may choose to create a new Decision Term for Editors, such as "Transfer". This term may be associated with either the 'Accept' or 'Reject' Decision Family.

TO CONFIGURE:
For publications which are members of an IJRS People Sharing Group, a new "Configure Cross-Publication Submission Transfer" link is added in AdminManager, just after "Share People" and before "View File Transfer Statistics".

To enable the submission transfer feature to/from your publication, select/check the box labeled 'Enable cross-publication submission transfer'. In the bottom portion of the page, enter e-mail addresses to receive notification when a transferred submission is received by your publication (top line), and e-mail addresses to receive notifications in the event of an outbound transfer error (bottom line). Multiple e-mail addresses may be entered for each option, however there must be at least one valid e-mail address for each in order to enable this feature.

NOTE: Both publications (sending and receiving) must have the 'Enable cross-publication submission transfer' box selected/checked in order to use the feature.

Configure Cross-Publication Submission Transfer

[Cancel] [Submit]

To enable submission transfer to/from your publication, select the box below and enter e-mail addresses to receive notification when a transferred submission is received or in the case of a transfer error.

☐ Enable cross-publication submission transfer

Please enter the e-mail address(es) for notification

Transferred submission received:

[   ]

If entering more than one e-mail address, use a semicolon between each address.

Error during outbound transfer:

[   ]

If entering more than one e-mail address, use a semicolon between each address.

[Cancel] [Submit]

A new event –"Final Disposition - Transfer"– is added to ActionManager for use on the sending publication at the outbound transfer of a submission. This event is triggered when the Final Disposition of a submission is successfully set to "Transfer". Letters may be configured in ActionManager for Authors, Reviewers, and Editors, though letters will only be sent to the Corresponding Author, any Reviewers that were invited to review any revision of the submission, and Editors in the editorial chain for all revisions of this submission.

When the final disposition of 'Transfer' is selected and the recipient publication is chosen, the Customize Letters page will display. The Editor will have the opportunity to customize any letters configured for the event in ActionManager for the Corresponding Author, any Reviewers that were invited to review any revision of the submission, and Editors in the editorial chain for all revisions of this submission.

A default 'Transfer Letter' is automatically added to publications that enable the 'Transfer' feature. The Letter may be edited in 'Edit Letters', but may not be removed.

Edit Letters

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

Letters can be sent as either plain text or HTML format. Please note that not all e-mail clients support HTML format.

Letters designated as HTML format can include images. Upload the image files using the 'Edit Image Files for HTML Letters' button. To include the images in the letter, edit each individual letter. Note: Additional HTML tags must be included in the letter to properly display the letter in HTML format.

Back to Policy Manager

[Add New Letter] [Save Changes] [Edit Image Files for HTML Letters]

Letter Purpose	Letter Family	Text Format		HTML Format		All Formats
Ad Hoc Letter	Ad Hoc From Editor	⦿	Edit	○	Edit	Remove
Assign Copy Editing	Production	⦿	Edit	○	Edit	Remove
Author Approve Changes	General	⦿	Edit	○	Edit	Remove
Author Instructions and Due Date	General	⦿	Edit	○	Edit	Remove
Author Invitation for Commentary	Author Invitation	⦿	Edit	○	Edit	Remove
Author Invitation for Proposal	Author Invitation	⦿	Edit	○	Edit	Remove
Author Notice Editor Made Changes to Submission	Communications to Author		Edit	○	Edit	Remove

[this part of page unchanged]

Reviewer Reminder - Before Due Date	General	⦿	Edit	○	Edit	Remove
Reviewer Thank You	General	⦿	Edit	○	Edit	Remove
Reviewer Uninvited Notice	General	⦿	Edit	○	Edit	Remove
Send Username and Password	General	○	Edit	○	Edit	Remove
Transfer Letter	Transfer Letter	⦿	Edit	○	Edit	
Welcome	General	⦿	Edit	○	Edit	Remove

[Add New Letter] [Save Changes] [Edit Image Files for HTML Letters]

Back to Policy Manager

When the Final Disposition of a submission is set to "Transfer", the status is changed to 'Submission Transferred'. The Status Term may be edited on the 'Edit Document Status Text' page in PolicyManager but may not be removed.

Receive Transferred Submission from Another Publication

New in EM/PM v7.3, publications that use Inter-Journal Resource Sharing (IJRS) may now use a new Cross-Publication Submission Transfer feature to receive submissions transferred from another publication. There may be times when a manuscript is submitted to a larger main publication within an IJRS-linked group, and while it is worthy of publication it may not be a good fit for that particular publication; it may be a better fit at a smaller "sister" publication. This new feature allows IJRS-linked journals to transfer submissions (including submission files and metadata) from one Editorial Manager site to another.

IJRS linked journals wishing to use this feature first need to enable the feature in AdminManager on the new 'Configure Cross-Publication Submission Transfer' page. Once this feature is enabled, publications will be able to receive submissions transferred from other publications in the IJRS-linked group that also have the transfer feature enabled.

When a submission is transferred into a publication, it is received in a new folder called "Transferred Submissions". This folder will appear on the Editorial Main Menu for any Editor role with the new 'Receive New Transferred Submissions in 'Transferred Submissions' Folder' permission enabled.
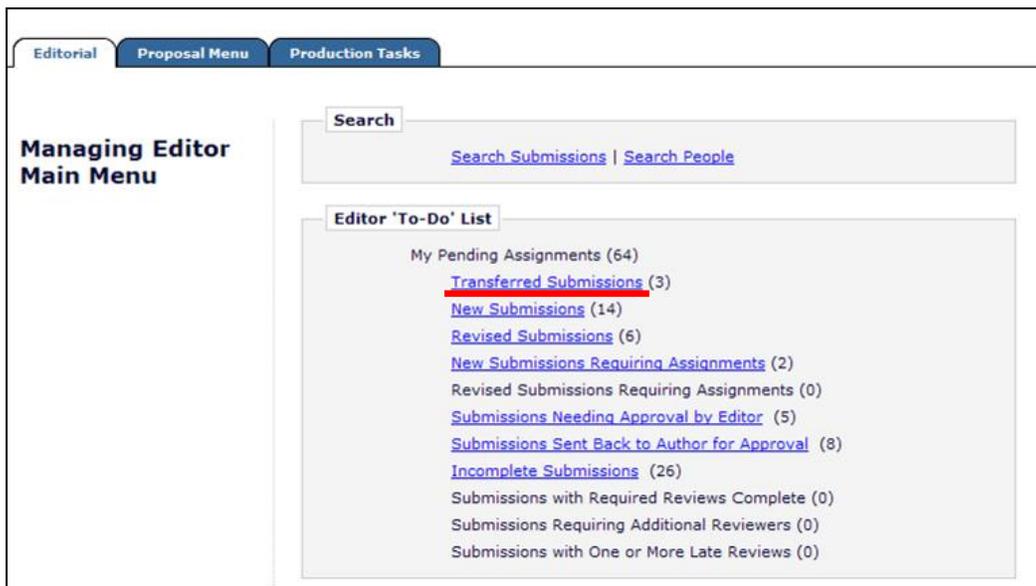
When a transfer is successful, a letter is sent to the e-mail address configured for the recipient publication on their 'Configure Cross-Publication Submission Transfer' page (see configuration information below). This letter is also stored in the History of the submission in the recipient publication.

The submission record is initially populated in the recipient publication with data from the sending publication according to the following rules:

1. System fields that are not configurable, such as Article Title, Author Comments to Journal, etc. will be automatically populated with the associated data from the original publication. If the recipient publication imposes any restrictions on these fields (such as character limitations), the full information will initially be stored in the database at transfer, but the configured rules will be enforced when the submission is edited and built into the PDF.
2. Co-author information is transferred in full.
3. Other system fields that are configurable, such as Article Type, Classifications, Section/Category, etc. are populated only if the recipient publication has an exact match to the transferring publication; otherwise they are left blank or populated with default values as needed. The recipient publication's requirements for these fields will be enforced when the administrator or Author edits the submission.
4. Custom fields, such as Additional Information fields and Submission Item Metadata fields are populated only if there is an exact match in the label and data type.
5. Submission files and any non-hidden companion files are transferred, though the system PDF is not. Submission Item specific metadata is transferred according to the above rules for System and Custom fields. Any transferred submission file that does not have a matching Submission Item Type in the receiving journal is treated like a file that was uploaded in a ZIP file; it is listed, but no Submission Item designation is selected.

The Editor with the new 'Receive New Transferred Submissions in 'Transferred Submissions' Folder' permission enabled then accesses the submission through the new "Transferred Submissions" folder where he must edit the submission (using the 'Edit Submission' Action Link) to verify that all publication-required fields have been completed appropriately. If the submission meets the publication's configured requirements and requires no further edits or additional information, then the Editor may proceed to build the system PDF (which is not included in the transfer). Alternatively, if there is any missing information, the Editor may use the 'Send Back to Author' Action Link to return the submission to the Corresponding Author for him or her to complete any missing information and build and submit the submission PDF.

After the PDF is built and approved (by either the Editor or the Author), the submission remains in the "Transferred Submissions" folder and a 'Transfer Complete' Action Link appears. When the submission is ready to be moved into the publication's editorial workflow, the Editor clicks the new "Transfer Complete" Action Link to move the submission into the publication's normal workflow as a new submission (i.e. the *New Submissions* folder for publications which require technical check, the *New Submissions Requiring Assignments* folder for publications that do not require a technical check, or the *Direct-to-Editor New Submissions* folder for the appropriate editor in Direct-to-Editor configurations).

NOTE: Submissions may be transferred from another publication after the submission has gone through that publication's editorial process and a decision has been made.

These submissions will still be placed in the recipient publication's 'Transferred Submissions' folder and will go through the recipient publication's editorial process.

After the 'Transfer Complete' link is clicked, the submission is processed as any other submission, however the *Details* page will display a new 'Transfer Information' section at the bottom (for the default Editorial Detail layout). This section displays the publication from which the submission was transferred and a link to the transfer letter.

The 'Transfer Information' section can be added to custom Details as well, but will only display if the submission has been transferred. If there is no information, the section is suppressed.

TO CONFIGURE:
For publications which are members of an IJRS People Sharing Group, a new "Configure Cross-Publication Submission Transfer" link is added to AdminManager, just after "Share People" and before "View File Transfer Statistics".

AdminManager Main Menu

Set Live Journal Flag
Set Default Target FTP Site for Extract of Conference Submissions
Share People
Configure Cross-Publication Submission Transfer
View File Transfer Statistics
Configure Restricted System Administration Access Rights
Enable Preprint Manager

To enable the submission transfer feature to/from your publication, select/check the box labeled 'Enable cross-publication submission transfer'. In the bottom portion of the page, enter e-mail addresses to receive notification when a transferred submission is received by your publication (top line), and e-mail addresses to receive notifications in the event of an outbound transfer error (bottom line). Multiple e-mail addresses may be entered for each option, however there must be at least one valid e-mail address for each in order to enable this feature.

NOTE: Both publications (sending and receiving) must have the 'Enable cross-publication submission transfer' box selected/checked in order to use the feature.

Configure Cross-Publication Submission Transfer

Cancel   Submit

To enable submission transfer to/from your publication, select the box below and enter e-mail addresses to receive notification when a transferred submission is received or in the case of a transfer error.

☐ Enable cross-publication submission transfer

Please enter the e-mail address(es) for notification

Transferred submission received:

If entering more than one e-mail address, use a semicolon between each address.

Error during outbound transfer:

If entering more than one e-mail address, use a semicolon between each address.

Cancel   Submit

In RoleManager, select the Editor role(s) to receive transferred submissions, and select/check the new 'Receive New Transferred Submissions in 'Transferred Submissions' Folder' option.

Updates to Journal Accountability Report (JAR)

A new line item is added to the Journal Accountability Report to calculate the number of submissions that were transferred before significant processing took place and therefore will not count toward submission count charges.

The header reads "Submissions Transferred" and the description reads "Manuscripts that were transferred to another publication before a manuscript number was assigned. Manuscripts included in this category are also included in New Manuscripts Received above."

Included in the count are all regular submissions which were transferred BEFORE any processing occurred (no Manuscript number was assigned).

Partial page displayed of JAR results:

Submission Statistics

New Manuscripts Received (by First Receipt Date) *Bona Fide manuscripts submitted by Authors during the specified time period. This number may include submissions that have been removed by the journal office and manuscripts that have been submitted, but have not yet been assigned to an Editor.*	2
New Manuscripts Received (by current Initial Date Submitted) *Manuscripts submitted by Authors during the specified time period. This number may change if a submission is returned to the Author and resubmitted by the Author at a later date. In this case, the resubmission date is stored as the Initial Date Submitted, overwriting the original Initial Date Submitted. This number may include submissions that have been removed by the journal office and manuscripts that have been submitted, but have not yet been assigned to an Editor.*	2
Submissions Removed by the Journal Office *Editorial staff may remove submissions from the system before an Editor is assigned. Manuscripts included in this category are also included in New Manuscripts Received above.*	0
Submissions Transferred *Manuscripts that were transferred to another publication before a manuscript number was assigned. Manuscripts included in this category are also included in New Manuscripts Received above.*	0
Manuscripts Submitted but Technical Check Not Yet Complete	

TO CONFIGURE:
No configuration required to display this item on the Journal Accountability Report. Publications using this feature will see transferred submissions calculated on this report.

PRODUCTION TRACKING ENHANCEMENTS
Alphabetize Companion File List

In prior versions of EM/PM, when a user uploaded a Companion file, or changed the Item Type of a previously uploaded Companion file, the list of Item Types was presented in the order in which the Item Types were created. New in v7.3, throughout Production Tracking, all Companion File Item Types are presented in alphabetical order in the drop-down lists used to select them.
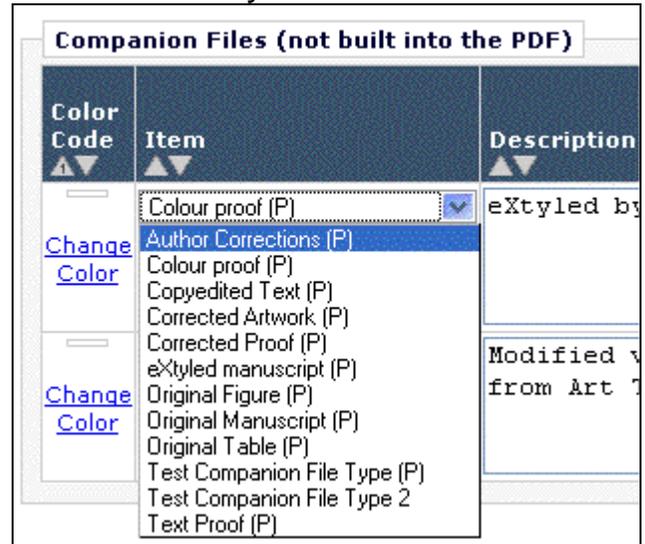
The Companion File List displays in alphabetical order when viewed on the following pages:

- Submission File Inventory

- Schedule Group File Inventory

- Upload Submission Companion File

- Upload Schedule Group Companion File

- Assign Submission Production Task

- Submit Submission Production Task

- Assign Schedule Group Production Task

- Submit Schedule Group Production task
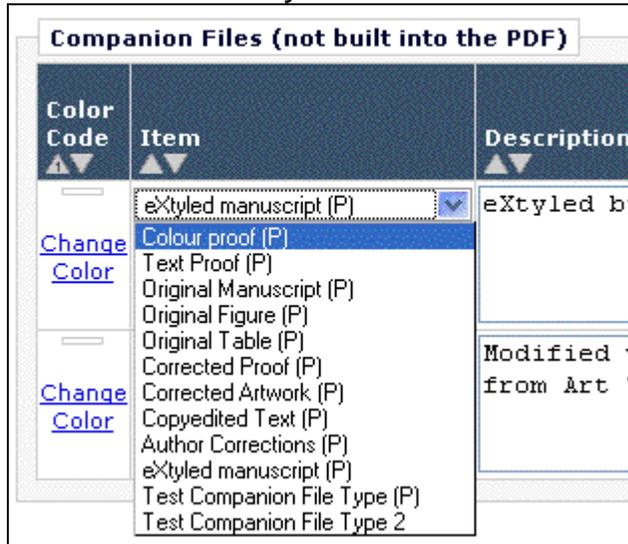
Current Functionality   *New Functionality*

TO CONFIGURE:
No configuration necessary; the list displays in alphabetical order for all pages listed above.

em Editorial Manager® **pm** Preprint Manager® **cm** Commerce Manager™

Default Next Production Task

When assigning a Production Task (for a Submission or a Schedule Group) the user is presented with a drop-down list of all tasks appropriate to that user, further restricted by the Task Types appropriate to an Article Type, if so configured. New in PM v7.3, the behavior of the 'Production Task:' drop-down is enhanced to pre-select a production task, by reviewing all previously assigned tasks, and selecting the first task that has not yet been assigned (based on the order established on the PolicyManager pages).

Cancelled tasks are treated as if they had never been assigned, so the default task selected may be a task that has already been cancelled. If all task types in the list have been assigned at least once, then the system will fall back to the current 'Please Choose a Production Task' option.

NOTE: This new functionality only suggests a task by making an initial selection in the 'Production Task' drop-down; the user may still change this to select any other available production task.

Prior to v7.3, selecting a task from the list would automatically bring the user to the *Assign Production Task Letter* page. New in v7.3, confirmation is now required from the user that the system has made the correct selection. The user must click the new 'Proceed with Selected Task' button to confirm selection of the Task. The user is then navigated to the next page to configure the Assignment letter and assignment Files before completing the assignment of the Production Task.

Assign Production Task for Manuscript Number: DEMO-D-03-00056, DOI: Unassigned
Anthony Author (UNITED STATES): "This is an article for submission"

Select the production task you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear.

Schedule Group:	Spring 2008
Production Task:	Copyedit

Cancel   Proceed with Selected Task

This new functionality affects both Submission Production Task assignments and Schedule Group Production Task assignments; in each case, the system pre-selects the first unassigned task type in the list.

Assign Production Task for Schedule Group: Summer Issue

Select the production task you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear.

Schedule Group: Summer Issue
Production Task: Copy Edit and Review ▼

Cancel | Proceed with Selected Task

TO CONFIGURE:

There is no additional configuration required for this enhancement. Only the functionality behind the 'Production Task:' drop-down on all Production Task Assignment pages is modified.

Editor/Publisher Assignment Totals by Task Type Report Enhancement

The existing PM report 'Editor/Publisher Assignment Totals by Task Type' is enhanced in v7.3. Two new hard-coded date ranges are added to the 'Fixed Date Range' drop-down list on the selection criteria page:

- "Last week" – pulls Submission Production Tasks from Sunday to Saturday of the week immediately previous to the current week. NOTE: The week starts at 12:00 AM on Sunday and runs to 11:59 PM on Saturday.

- "Current week" – pulls Submission Production Tasks from Sunday of the current week up to the current date/time the report is run. The report header reflects the Saturday of the current week.

Per current functionality, the dates used are either the 'Assignment' dates or the 'Completion/Cancellation' dates associated with the Submission Production Tasks (as selected via the existing radio buttons on the report). The default selection is 'Assignment' dates.

TO CONFIGURE:
No configuration required. The new selections are available for users with permission to run the report.