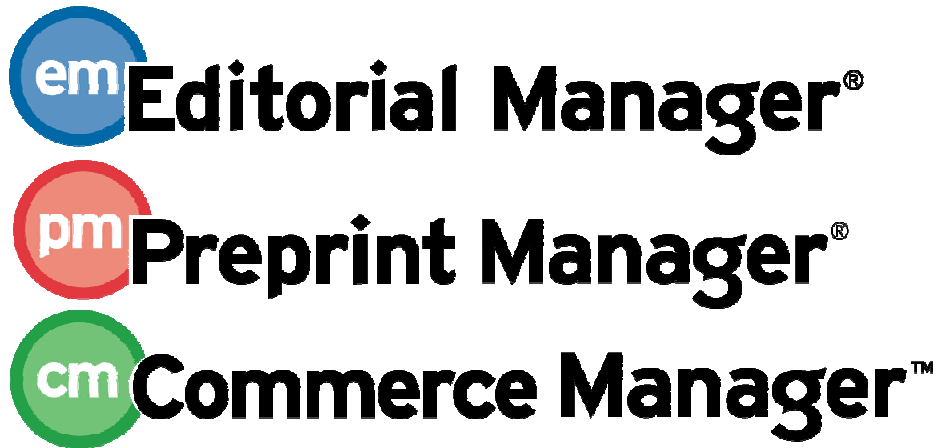


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Aries Systems Corporation



Release Notification

**Editorial Manager/Preprint Manager
9.0 General Release Notification
11/21/2011
Draft – Subject to Change**

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Document Change Log

Date	Version	Change
08/19/2011	Beta Release	Beta version
10/18/2011	Gamma Release	Addition of 'Review Form Enhancement' section Additional information in 'Deposit Submission to PubMed Central' section
11/21/2011	General Release	No Changes

Editorial Manager/Preprint Manager 9.0 General Release Notification

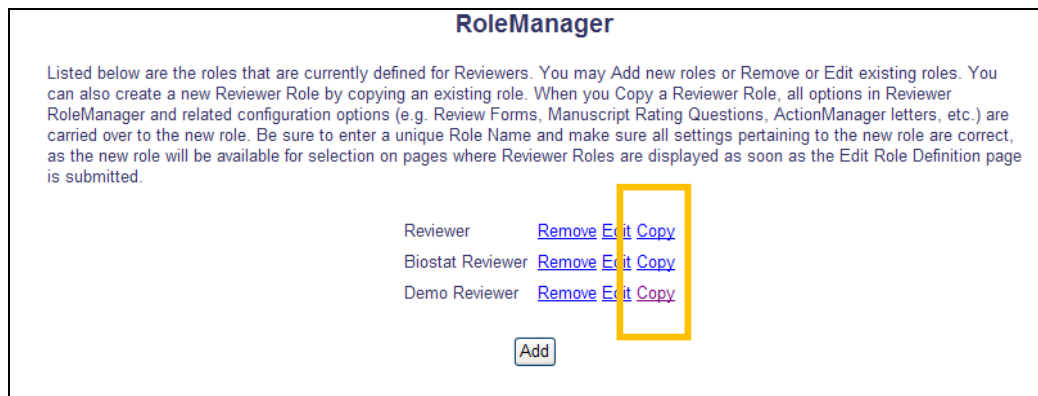
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GENERAL ENHANCEMENTS

Copy Role

Publications sometimes require new user Roles to be created for Reviewers, Editors, or Publishers. New in v9.0, System Administrators may now copy existing Roles and modify the permissions for new Roles rather than having to start from scratch in configuring roles.

Each of the roles Reviewer, Editor, or Publisher may now be copied using a new Copy link next to each role.



When a role is copied, the configured settings are copied as well. This includes:

- Reviewer Roles – Letters in ActionManager, Review Form configuration, Bibliographic Searches
- Editor Roles – Letters in ActionManager, Editor Form configuration, Bibliographic Searches, Shared Searches, Production Tracking assignment capabilities (both Production Tasks and Schedule Group Tasks)
- Publisher Roles – Letters in ActionManager, Bibliographic Searches, Production Tracking assignment capabilities (both Production Tasks and Schedule Group Tasks)

When the role is first copied, the system administrator is brought to the *Role Configuration* page. All configurations of the copied role are set, and a unique role name must be entered in the 'Role Name' field. The administrator can make any additional changes desired, and then submit the page to create the new role. The new role will be available for selection on pages where roles are displayed as soon as the *Edit Role Definition* page is submitted.

NOTE: When copying a role, don't forget to check other pages (not just *Edit Role Definition*) to adjust and confirm all the settings for the new role. For example, since letters are copied to the new role, go to ActionManager and/or the *Edit Letters* page to make sure all letters for the new role are correct.

Sample Reviewer Role configuration page:

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

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

Permissions for New Reviewer Invitations

- View Abstract Text
- Download Manuscript (Reviewer PDF)
- Download Submission Item
- View Corresponding Author and Affiliation
- View All Authors and Their Affiliations
- View Keywords
- View Document Classifications

Permissions for Pending Assignments and Completed Assignments

Some additional cosmetic changes have been made to RoleManager. New in v9.0, the Role Name is defined on the *Edit Role Definition* page rather than on the RoleManager page with the list of configured roles.

Additionally, new in v9.0, when the administrator clicks the Remove link for any existing role, a warning message will display at the top of the page if there are currently users with this role assigned.

em Editorial Manager™

em Editorial Manager™

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Role: Managing Editor Username: mary

Sorry, "Demo Reviewer" cannot be removed because there are 5 people assigned to it.

Rolemanager

Listed below are the roles that are currently defined for Reviewers. You may Add new roles or Remove or Edit existing roles. You can also create a new Reviewer Role by copying an existing role. When you Copy a Reviewer Role, all options in Reviewer RoleManager and related configuration options (e.g. Review Forms, Manuscript Rating Questions, ActionManager letters, etc.) are carried over to the new role. Be sure to enter a unique Role Name and make sure all settings pertaining to the new role are correct, as the new role will be available for selection on pages where Reviewer Roles are displayed as soon as the Edit Role Definition page is submitted.

Reviewer	Remove Edit Copy
Biostat Reviewer	Remove Edit Copy
Demo Reviewer	Remove Edit Copy

TO CONFIGURE:

No configuration is required to enable Copying Roles. The new feature is in place on upgrade.

NOTE: When an Editor Role is copied, and the original Editor Role has permission to receive assignments and is configured to receive automatic reminders on the *Configure Automated Summary Reminders* page, the new role will not have the same reminders configured. This is because the new Editor Roles may not require reminders immediately, so it is better for the administrator to purposefully configure reminders.

Copy Article Type

Publications sometimes require new Article Types to be created for Authors to use in submitting papers. New in v9.0, System Administrators may now copy existing Article Types and modify these for new Article Types rather than having to start from scratch in configuring Article Types.

A new Copy link appears for each Article Type (including 'Hidden' Article Types).



The screenshot shows the 'Edit Article Types' interface. It features a table with columns for 'Order', 'Article Type', 'Article Type Family', and 'Invited'. Each row represents an article type and includes 'Remove', 'Edit', and 'Copy' links. Yellow arrows point to the 'Copy' links for the first five rows. Below the table is an 'Update Item Order' button and an 'Add' button.

Order	Article Type	Article Type Family	Invited	Actions
<input type="text" value="1"/>	Original Study	Regular		Remove Edit Copy
<input type="text" value="2"/>	Letter to the Editor	Regular		Remove Edit Copy
<input type="text" value="3"/>	Perspective	Regular		Remove Edit Copy
<input type="text" value="4"/>	Rapid Communication	Regular		Remove Edit Copy
<input type="text" value="5"/>	Case Report Article	Regular		Remove Edit Copy
<input type="text" value="6"/>	News Item	Regular		Remove Edit Copy
<input type="text" value="7"/>	Review	Regular		Remove Edit Copy
<input type="text" value="8"/>	Commentary	Regular	✓	Remove Edit Copy
<input type="text" value="9"/>	Abstract	Regular		Remove Edit Copy
<input type="button" value="Update Item Order"/>				
	Convention Proposal	Regular		Remove Edit Copy
				<input type="button" value="Add"/>

When an Article Type is copied using the new Copy link, the new Article Type is automatically set to 'Hidden' and the following settings are carried over to the new Article Type:

- All options on the Edit Article Type page (including Submission Item parameters and Submission Item Metadata)
- Review Forms
- Editor Forms and Manuscript Rating Questions
- Additional Manuscript Detail Fields associated with the Article Type

Some additional cosmetic changes have been made to the *Add/Edit Article Type* page. New in v9.0, the Article Title and Family are defined on the *Add/Edit Article Type* page. The maximum size of Article Type Name has also been increased to 75 characters.

Add Article Type

Article Type:
Maximum Article Type name is 75 characters.

Family:
 Invited:

Assign the 'Proposed' Family to Editor-generated Article Types. Check the 'Invited' box for Article Types used when Authors are invited to submit.

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

Allow file uploads from arXiv.org server

Whether an Article Type is copied (using the Copy link) or added (using the 'Add' button), the Article Type Name field is blank. A unique name must be entered before the page can be submitted. Also, the 'Hide' checkbox is selected by default for all new Article Types. This allows the System Administrator to ensure that all configurations are in place before the Article Type is made available for Authors to use.

TO CONFIGURE:

No configuration is required to enable Copying Article Types. The new feature is in place on upgrade.

Display Custom Submission Questions on PDF Cover Page

In EM/PM v8.2, Publications are able to configure Author Questionnaires to ask Authors for Additional Information while they are submitting a manuscript. Additionally, publications may configure custom PDF Cover Page layouts for each Article Type, with different layouts for the Author/Editor PDF and the Reviewer PDF.

Publications often use the Author Questionnaire to solicit such things as Ethics statements, Conflict of Interest information, Copyright Assignments, etc., and new in EM/PM v9.0, publications can now make this information more visible throughout the editorial and peer review process. Administrators may now configure Custom Submission Questions and responses as available for inclusion on the PDF Cover Pages, and further choose which custom PDF Cover Page Layouts (for Author/Editor and Reviewer versions of the PDF) these questions should display on.

When questions are configured to be available for display on the PDF Cover Page, and when the questions are asked on an Article Type where the 'Additional Information' is configured to display on the corresponding PDF Cover Page, then the questions and answers will display on the Cover Page, with the question on the left and the answer on the right.

Sample PDF Cover Page:

Lithosphere

DOI Identification of Internet Properties

--Manuscript Draft--

Manuscript Number:	
Article Type:	Original Study
Section/Category:	New Research
Keywords:	DOI
Region of Origin:	United States of America
Abstract:	<p>The Digital Object Identifier (DOI®) System is for identifying content objects in the digital environment. DOI® names are assigned to any entity for use on digital networks. They are used to provide current information, including where they (or information about them) can be found on the Internet. Information about a digital object may change over time, including where to find it, but its DOI name will not change.</p> <p>The DOI System provides a framework for persistent identification, managing intellectual content, managing metadata, linking customers with content suppliers, facilitating electronic commerce, and enabling automated management of media. DOI names can be used for any form of management of any data, whether commercial or non-commercial.</p>
Additional Information:	
Question	Response
Do you certify that this research is entirely original?	Yes
Conflict of interest disclosure:	I have no conflicts of interest to disclose at this time. However, my co-author Benjamine Cacace is a member of the World Wide Web Consortium and may be influenced by the work they are doing.
What is your favorite color?	Blue
Please select all that apply:	golden; lemon; mellow
Please indicate which of the following government agencies provided funding for your research:	NIMH; NOAA; OSHA; NASA
What is the air-speed velocity of an unladen swallow?	

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TO CONFIGURE:

A new row is added to the *Add/Edit Custom Submission Questions* page in PolicyManager. This row, 'PDF Cover Page', allows the administrator to determine if the Question can show on the PDF Cover Page. On upgrade, all questions are checked, so are hidden from the PDF Cover Pages.

Edit Custom Submission Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of an Author Questionnaire used at the Additional Information step in the Submit Manuscript function. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Custom Submission Question is no longer available for selection in an Author Questionnaire.

[MIDDLE OF PAGE UNCHANGED]

Options:
 Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

Page	Hide	Editable	Required	Help Text
Manuscript Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Insert Special Character
			<input type="checkbox"/>	
PDF Cover Page	<input checked="" type="checkbox"/>	N/A	N/A	N/A

To display any configured Custom Submission Questions on a PDF Cover Page, go to PolicyManager, Define PDF Cover Page Layouts, and edit an existing PDF Cover Page layout, or create a new one (or copy a default template). Click the Select Items to Display link and select/check the 'Additional Information' option.

Partial page display; Select Items to Display:

Select Items to Display for Editor/Author Layout Full Almost

Select the information to appear on the PDF Cover Page.

Information Submitted by Author

- Article Type
- Full Title
- Secondary Full Title
- Short Title
- Secondary Short Title
- First Author
- Corresponding Author (*First, Middle and Last Name, Institute, City, State, and Country*)
- Corresponding Author E-Mail

[MIDDLE OF PAGE UNCHANGED]


- Keywords
- Secondary Keywords
- Classifications
- Author Comments
- Additional Information ←
- Requested Editor
- Region of Origin
- Suggested Reviewers
- Opposed Reviewers
- Response to Reviewers

Submit the page, and then re-order the display order of the items by entering the position number and clicking the ‘Update Order’ button.

Partial page display:

Layout order
Select the order in which the items should appear on the PDF Cover Page. To re-order the items, change the number for one item, click the 'Update Order' button, and all of the fields will re-order accordingly.

<input type="button" value="Update Order"/>	Default Description
<input type="text" value="1"/>	Manuscript Number
<input type="text" value="2"/>	Full Title
<input type="text" value="3"/>	Secondary Full Title
<input type="text" value="4"/>	Secondary Short Title
<input type="text" value="5"/>	Article Type
<input type="text" value="6"/>	Section/Category
<input type="text" value="7"/>	Keywords
<input type="text" value="8"/>	Region of Origin
<input type="text" value="9"/>	Abstract
<input type="text" value="10"/>	Secondary Abstract
<input type="text" value="11"/>	Additional Information



Do Not Unpack Zip Files

There may be times when Authors (or Editors) wish to upload an archive file (e.g., .ZIP files) as part of a submission, or as a companion file for a submission. These files may not need to be built into the PDF that is created for peer review, and it may be useful for these archive files to not be “unpacked” upon upload to EM/PM. New in EM/PM v9.0, publications may configure specific Submission Items to not unpack these archive files at upload.

When a user uploads an archive file (Attach Files, Upload Companion File, and FTP In production task), the system checks the new “Do Not Unpack Archive files (.ZIP, .tar) of this Type” setting in PolicyManager. If the new option is selected for a selected File Type, the archive file will not be unpacked, and is stored as a packed file).

New Submission

[Frequently Asked Questions](#)

Select Article Type
Enter Title
Add/Edit/Remove Authors
Select Section/Category
Submit Abstract
Enter Keywords
Select Classifications
Enter Comments
Suggest Reviewers
Oppose Reviewers
Request Editor
Select Region of Origin
Attach Files

Please Attach Files [Insert Special Character](#)

Required **Items** are marked with a *. When all **Items** have been attached, click **Next** at the bottom of the page.

Note that you may now upload ZIP FILES!!!!

Item: Zip File (Keep it Packed)

Description: Zip File (Keep in Packed)

Delivery Method: Online Web System Offline

File Name:

The order in which the attached items appear in the list will be the order in which they appear in the PDF file that is produced. You can change the order by clicking the arrows.

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

Change Item Type of all files to:

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	*Blinded Manuscript	Blinded Manuscript	Offline				<input type="checkbox"/>
2	Zip File (Keep it Packed)		Keep_it_packed.zip	4.6 MB	Dec 30, 2010	Download	<input type="checkbox"/>

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

NOTE: If the user clicks the [Download](#) link for a packed file, the behaviour depends on the user’s browser and operating system.

Once an archive file has been uploaded to the system, the user can change the ‘Item’ designation of the packed file, but the only Items displayed in the drop-down list are other Items that are

configured with the new “Do Not Unpack Archive files (.ZIP, .tar) of this Type” option. This is to ensure that an Author (or Editor editing the submission) does not change an archive file Item Type to one that is built into the PDF, thereby causing an error with the PDF build.

When an archive file remains packed in the system:

1. It is excluded from any asynchronous processes (e.g., AQC, CrossCheck).
2. The Author or Editor cannot change the Submission Item Type to another Item Type that is configured to be unpacked.
 - Exception: if the uploaded file is not an archive file format (that is, the user selected a ‘zip’ item type but made an error and did not upload a compressed file), the Item Type can subsequently be changed to any other Item Type (it is not limited to item types with the new “Do Not Unpack Archive files (.ZIP, .tar) of this Type” checkbox selected). This is because the item is not a true zip file and must be able to be reassigned to an Item Type that is not configured as a zip file.

TO CONFIGURE:

To configure a submission item to not unpack the archive file, go to PolicyManager, *Edit Submission Items*, and either Edit an existing item or Add a new item. The new ‘Do Not Unpack Archive files (.ZIP, .tar) of this Type’ option is only displayed for the following PDF Handling options and is unselected by default:

- Build Hyperlink to the Item into the PDF (Item Not Displayed in PDF)
- Companion File (not built into PDF)

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

PDF Handling:

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

Display with automatic line numbering in PDF

Include this Item Type for Artwork Quality Checking

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

When this option is selected for a particular Submission Item and a user uploads/imports an archive file, that file is not unpacked and will remain packed in the system. When this option is not selected, uploaded/imported archive files are unpacked and each individual file is listed.

CrossCheck Enhancements

In EM/PM v8.2, CrossRef members who have agreed to participate in the CrossCheck plagiarism detection service are able to access CrossCheck through Editorial Manager's File Inventory page. Users (with proper permission) are able to select files to download, and click a button to open a new CrossCheck window.

New in EM/PM v9.0, there is a more complete integration between EM and CrossCheck/iThenticate that:

- Automates the transfer of files from EM into iThenticate
- Provides visibility on the status of submissions deposited for checking
- Provides visibility on a submission's overall Similarity Score
- Provides access to CrossCheck reports from within the EM user interface

NOTE: Existing functionality will be retained for publications that do not wish to set up automatic transfer of files to CrossCheck/iThenticate.

When the automatic transfer is configured, Editors can now select files from the File Inventory and ask the system to CrossCheck those files. The files will be transferred to CrossCheck, and the system will periodically check for the completed Similarity Report. In addition to selected submission files, the Editor can choose to send the Reviewer PDF (the PDF version built on submission for sending to the Reviewer); this may be useful for depositing file types not yet supported by CrossCheck.

File Inventory for Manuscript Number: BETSYTEST82-D-11-00007
"Environmental Impacts of Pesticide Sprays Aimed at Eradicating Eastern Equine Encephalitis (EEE)"

Listed below are the files included in the current version of the latest Revision of the submission. Click the Download link to download the individual source file. To download a zip file containing multiple items, select the items using the check boxes, and then click the 'Download Zip File' button. The 'Check All' and 'Clear All' links may be used to select or unselect all the files. Additional software (such as WinZip) must be installed on your computer in order to unzip (uncompress) the zip file. [View Submission](#)

You may also use CrossCheck/iThenticate to run similarity checks on the source file(s).[\(more...\)](#)

If a checkbox does not appear in the 'Select' column for a file, the file is no longer available. Click the Download link in the Action column for more information about the file.

Close Save and Close

Upload Companion File

[Check All](#) [Clear All](#) [CrossCheck/iThenticate Results](#)

Select	Action	Item	Description	Item Family	File Name	Size	Last Modified	QC Results	Display On Transmittal Form
<input type="checkbox"/>	Download	Manu Script	Manuscript	Document	demo.manuscript.doc	25.5 KB	Mar 14 2008 10:42AM	Tested	<input checked="" type="checkbox"/>

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

Close Save and Close

Upload Companion File

Download Zip File

CrossCheck: Selected Files CrossCheck: Reviewer PDF

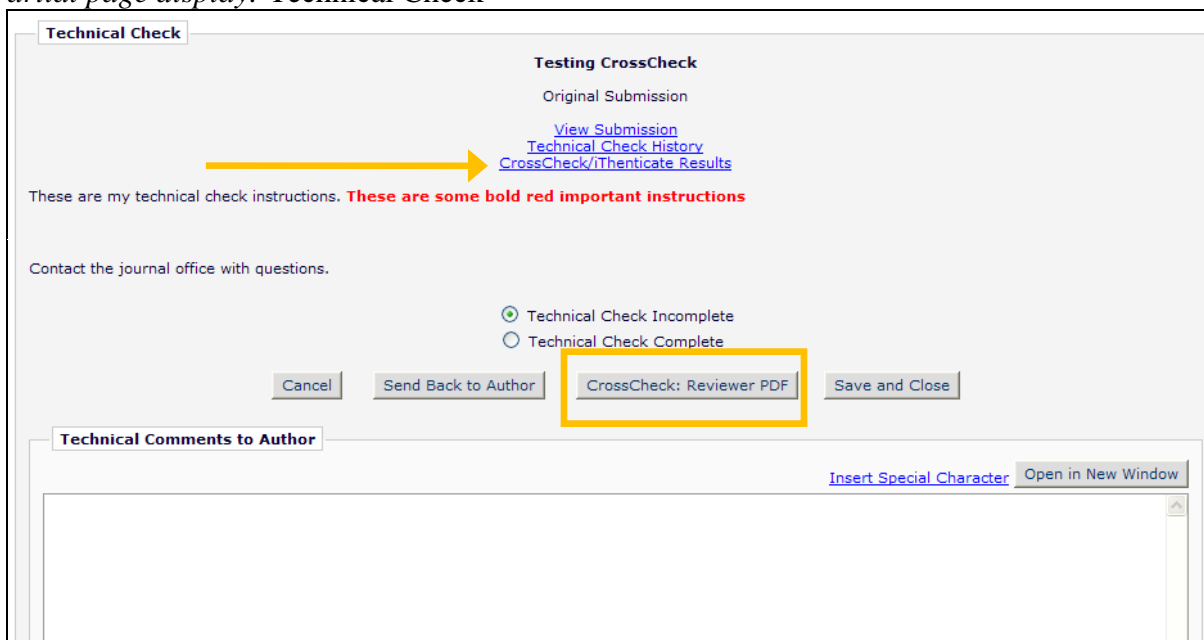
When automatic transfer to CrossCheck is enabled for the publication, then individual Article Types can be configured to trigger a completely automatic deposit of the Reviewer PDF at one of three times:

- On Initial Submission
- On First Revision
- On Final Disposition of Accept

This allows publications to identify key submission types that will always be run through similarity checking.

Alternatively, for publications configured to use Technical Check, the Technical Check page is enhanced with a link to view CrossCheck results (if they already exist) and with a button to trigger a CrossCheck deposit of the Reviewer PDF. This allows the Editorial Office to manually trigger a CrossCheck deposit here for selected submissions, e.g. only when the determination is made that the submission is to be peer-reviewed. The Editorial Office does not need to wait for Cross-Check results before completing the technical check and assigning to an Editor.

Partial page display: Technical Check



Submissions where files have been sent to CrossCheck using automatic transfer will display a new [CrossCheck/iThenticate Results](#) link. The maximum Similarity Score value associated with the submission will display if that score exceeds a configured threshold value (configured in PolicyManager). By setting the threshold appropriately, Editors can be alerted to submissions with reports that may require special attention.

Partial page display; new action link including similarity score display:

Linked Submissions				
View Submission	AMYTEST30-		Linda L. Edney	Pr
CrossCheck/iThenticate Results (83%)	D-04-00010			st
Details				

Partial page display; collapsed action links, showing Similarity Score:

Action Links (83%)	Rapid communication		Testing TT17990 Part 4 - Author
------------------------------------	---------------------	--	---------------------------------

Clicking the [CrossCheck/iThenticate Results](#) link from any folder (where it appears), *Technical Check*, *Details* or *File Inventory* opens a new page displaying all file(s) sent to iThenticate by automatic transfer, the status of the report, and the Similarity Score for each file. If the Score is equal to or greater than the configured threshold for the publication, this displays in red text.

NOTE: This page displays results for all deposits with CrossCheck over *all* revisions. The single similarity score displayed in the Action Links area for a submission is the largest of these individual values. To 'retire' a Similarity Score from an earlier version of the submission, or if the Similarity Score for any individual file is determined to be an anomaly the 'Ignore Score' option can be used to prevent that being taken into consideration for the headline score displayed in action links.

The instructions that appear on this page can be customize to provide publication-specific guidance to Editors.

Sample page:

**CrossCheck/iThenticate Results - Submission AMYTEST50-D-06-00010
"wpd-13"**

The results of each attempted deposit of files from this submission with CrossCheck/iThenticate is listed below. The 'Score' value is the overall Similarity Score returned by CrossCheck/iThenticate when the report is completed; click on any 'Completed' status link to view the full Similarity Report from CrossCheck/iThenticate.

The largest Score value will be displayed as the overall Similarity Score for the submission, unless the associated 'Ignore Score' checkbox is set/enabled.

[File Inventory](#)

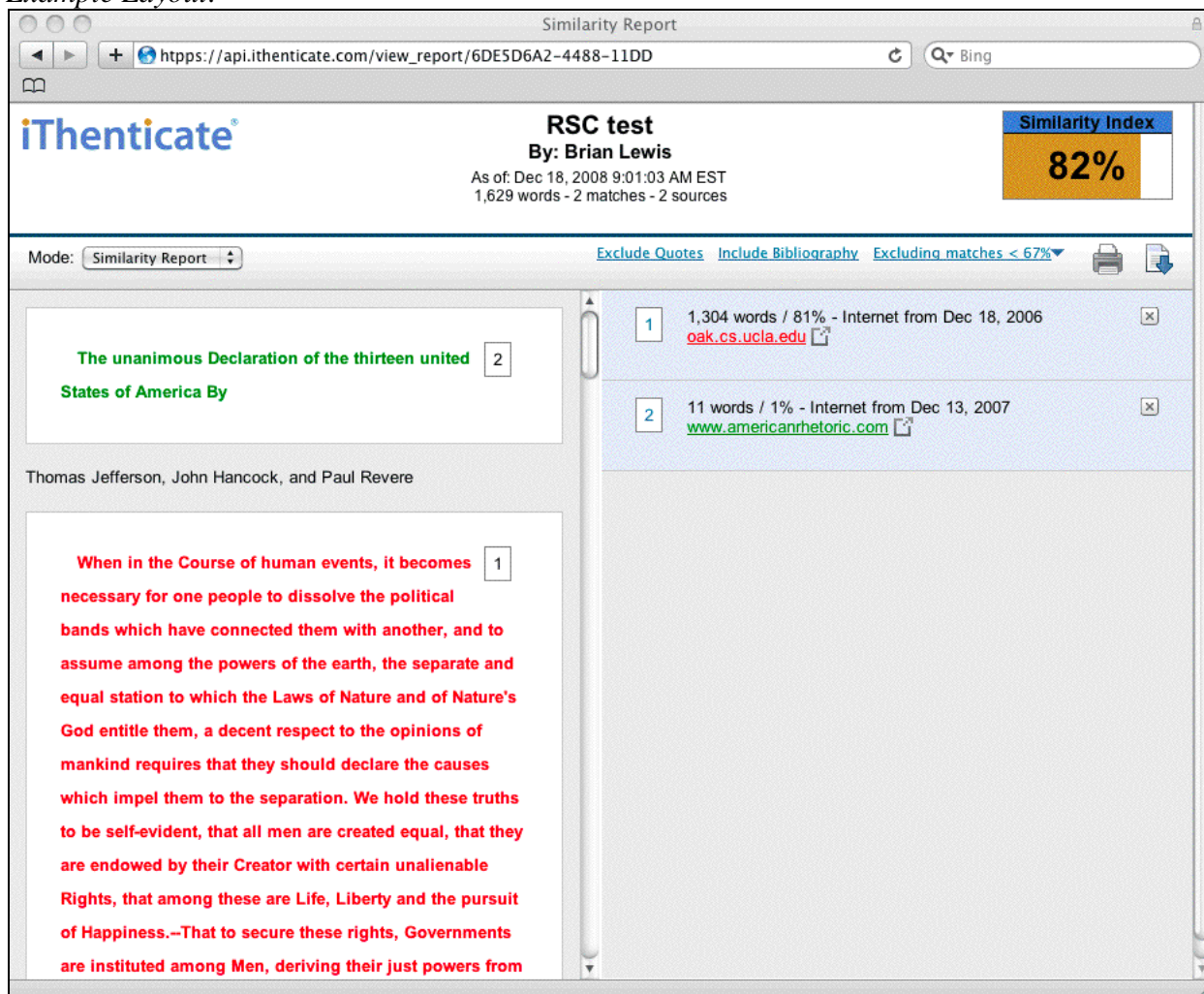
CrossCheck/iThenticate History				Submission Similarity Score: 83%		
Date	Rev.	Triggered by	File Sent	Report Status	Score	Ignore Score
13 December 2010	0	New Submission	AMYTEST50-S-06-00032.pdf	Completed	83%	<input type="checkbox"/>
14 December 2010	0	John Smith, Editor-in-Chief	Abstract.doc	Error		<input type="checkbox"/>
14 December 2010	0	John Smith, Editor-in-Chief	Clinical Methods.doc	Error		<input type="checkbox"/>
17 December 2010	0	John Smith, Editor-in-Chief	AMYTEST50-D-06-00010.pdf	Completed	79%	<input type="checkbox"/>
23 February 2011	1	First Revision	AMYTEST50-D-06-00010.pdf	Pending		<input type="checkbox"/>
23 February 2011	1	Anne Editor, Journal Office	Abstract.doc	Completed	87%	<input checked="" type="checkbox"/>

[Close](#)

Clicking the [Completed](#) link for any file opens a new window displaying the CrossCheck similarity report. This is a standard iThenticate report page, similar to that seen when logging into iThenticate directly, except that the viewer may only view this report and cannot navigate to

other folders or submissions. This defaults to the Similarity Report mode, but the iThenticate *Mode*: drop-down can be used to switch to any other report Mode.

Example Layout:

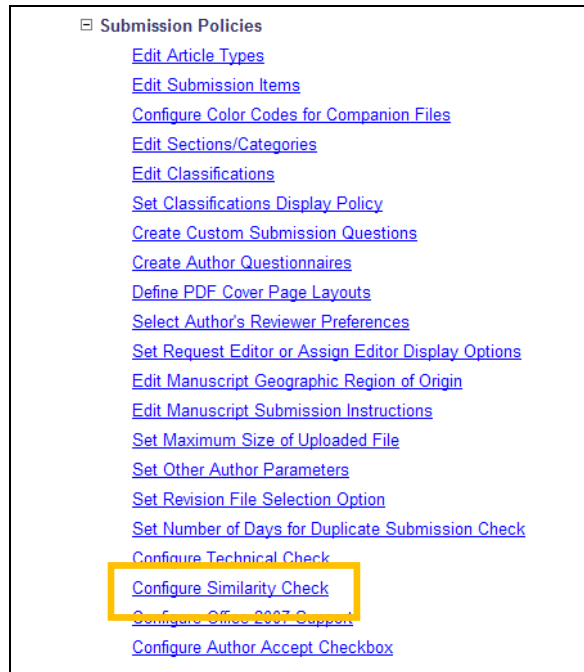


NOTE: If any file sent to iThenticate is larger than 20Mb it will be split into separate parts by iThenticate, based on numbers of words, and separate reports are returned for each part. Each part will have a similarity score of its own.

TO CONFIGURE:

To enable CrossCheck for your publication, contact your Aries Account Coordinator. Before you can configure automatic transfer, you will need a single, valid iThenticate user account for your publication, and must create an iThenticate folder to receive files transferred by EM. You can give this folder, and its container group, any name you wish; EM will retrieve the list of groups and folders using the iThenticate login details you supply.

For publications with CrossCheck currently enabled, a new Configure Similarity Check option is available in PolicyManager, in the 'Submission Policies' section.



Clicking this link opens a new *Configure Similarity Check* page where the system administrator can configure aspects of Similarity Checking for the publication:

- Supply iThenticate login credentials - EM uses these for all automatic transfers. Configuring these turns on the automated transfer features.
- Define a Similarity Score Threshold - this triggers display of Similarity Scores in links, and the display style of the score.
- Customize instructions – instructions entered here are displayed to Editors on the *View CrossCheck Results* page.

To enable the automatic transfer of files to CrossCheck, select/check the ‘Enable Automatic Transfer to CrossCheck (powered by iThenticate)’ box in the top section, then enter the Username and Password of the iThenticate account (previously established between the publication and CrossCheck/iThenticate). When these are entered, click the ‘Select’ button to validate the information and select the destination folder from those established in the CrossCheck account.

The middle section defines a threshold value, used to control whether a headline Similarity Score value is displayed in an action link, and to change the display style of the Similarity Score to a warning (red text) style in all other contexts. The presence of the Similarity Score in the Action Link area on a list of submissions acts as a ‘flag’ indicating that the submission has at least one file that exceeds this score, so set this value accordingly, to a level which should prompt an Editor to check the full report.

The bottom section contains the instructions that display to Editors on the *CrossCheck/iThenticate Results* page. These instructions may be customized to suit the publication's policies, or to provide specific instructions to Editors.

Configure Similarity Check

Use this page to enable the automatic transfer of files to CrossCheck/iThenticate and provide guidance for Editor and Publisher Roles for display on the 'View CrossCheck/iThenticate Results' page. Set a threshold value to highlight Similarity Scores that exceed that threshold value.

Before you can configure your account settings, you must already have a CrossCheck/iThenticate user account, and you must have created a destination folder under this account to receive files transferred from Editorial Manager. After enabling automatic transfer, enter your account details below then select this destination folder from the list that is retrieved using the supplied account details.

After configuring these settings, additional configuration is found under each article type for a threshold value to trigger changes in similarity score display and trigger points for automatic deposit of the Reviewer PDF with CrossCheck.

Enable Automatic Transfer to CrossCheck (powered by iThenticate)

Username :

Password :

Destination Folder :

Highlight Similarity Scores that exceed:

Similarity Score Threshold: %

Customize 'View CrossCheck/iThenticate Results' page Instructions

[Insert Special Character](#)

The results from each file deposited with CrossCheck/iThenticate from this submission are listed below. The 'Score' value is the overall Similarity Score returned by CrossCheck/iThenticate when the report is completed; click on the 'Completed' status link to view the full Similarity Report from CrossCheck/iThenticate.

The largest Score value will be displayed as the overall Similarity Score for the submission, unless the associated 'Ignore

[View Default Text](#) [Revert to Default Instructions](#)

Once the configuration on this page is submitted, Editors with the 'Initiate Similarity Check' permission (previously labeled 'Initiate CrossCheck') can now initiate automatic file transfers to CrossCheck from the *File Inventory* and *Technical Check* pages.

To configure the system to automatically trigger a deposit of the Reviewer PDF without Editor intervention at key workflow stages, go to [Edit Article Types](#) to configure the automated trigger point for each Article Type. Options for automatic triggering are:

- On Initial Submission – when the Author approves an original submission (Rev=0), the Reviewer PDF is automatically deposited with CrossCheck for similarity checking.
- On First Revision – when the Author approves a revised submission (Rev=1), the Reviewer PDF is automatically deposited with CrossCheck for similarity checking.

- On Final Disposition of Accept – The Reviewer PDF is deposited to CrossCheck when an Editor selects a Final Disposition of “Accept”.

Edit Article Type

Article Type:

Maximum Article Type name is 75 characters.

Family: Regular
Assign the 'Proposal' Family to Editor-generated Article Types. Check the 'Invited' box for Article Types used when Authors are invited to submit.

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

Allow file uploads from arXiv.org server

Similarity Check: Send Reviewer PDF on Initial Submission

Send Reviewer PDF on First Revision

Send Reviewer PDF on Final Disposition to Accept

You must also set up Automatic Transfer to a checking service on the [Configure Similarity Check](#) page. Editor and Publisher Roles can be configured to send files by Automatic Transfer from the File Inventory or Technical Check pages even if you do not enable the options on this page.

HINT: If you do not want to send every submission for similarity checking, but want this information to be available to your Editors when they are first assigned, then you can either send the Reviewer PDF from the *Technical Check* page (if your site is configured to use Technical Check), or send the appropriate file from the *File Inventory* before assigning to the first Editor.

In RoleManager, select the Editor or Publisher roles to be given permission to Initiate or View Similarity checking.

NOTE: The existing “Initiate CrossCheck” permission is re-named “Initiate Similarity Check”.

Enable the ‘Initiate Similarity Check’ permission for those Roles that need to be able to send files to CrossCheck during the peer-review workflow. Even if you configure an Article Type to use an automated trigger point to send the Reviewer PDF, you may want to give an Editor Role the ability to send additional files in cases where a file needs to be sent that does not appear in the Reviewer PDF or where there is a problem with an earlier deposit and a replacement file has to be sent.

Enable the new ‘View Similarity Check Results’ permission for Roles that need to see the Similarity Score and report. Users with this permission enabled will see the new [CrossCheck/iThenticate Results](#) action link in various folders, Search Submissions Results, and *Custom Details* pages (if configured). All Editors with this permission will be able to view the full Similarity Report from iThenticate; they do not need their own iThenticate user accounts to do so.

HINT: If you use CrossCheck in your workflow, you may wish to configure all Editors in the decision chain with ‘View Similarity Check Results’ permission.

NOTE: Although you can configure Publisher Roles with permission to view the scores, this will only display in the *Details* and *File Inventory* pages – the ‘View CrossCheck Results’ action link is restricted to Editorial folders. If you enable this permission for Publisher Roles, you should configure their *Custom Details* page layout to include the action link.

Partial page display; Edit Role Definition page:

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. By holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking in the lists of decision terms, you may select or deselect multiple terms.

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

- New Submissions
- Editor Assignment
- Reviewer Invitations
- Editor Decisions
- Proposals/Commentaries
- System Conversion Tasks
- General Searching and Viewing
 - Use Editorial Details Layout
 - Search All Manuscripts
 - Search Only Assigned Manuscripts
 - Share Saved Searches
 - View Linked Submission Groups
 - Create/Edit Linked Submission Groups
 - Set Active/Inactive Status on Linked Submission Groups
 - View COS Scholar Universe Author Profiles
 - Search Similar Articles in MEDLINE
 - Search Author Publications in MEDLINE
 - Initiate Similarity Check
 - View Similarity Check Results
 - Bibliographic Search

Custom Details Enhancement



Users of the ‘Similarity Checking’ feature may wish to allow Editor or Publisher Roles access to the Similarity Results. Users with the ‘View Similarity Checking’ permission enabled now have the option of viewing the similarity results for a submission where the submission has automatically been submitted to CrossCheck. A new ‘Similarity Check’ link is available for inclusion on custom *Details* pages allowing Editor or Publisher Roles to access the similarity results.

This field may be added to the display in any position on the *Details* layout.

Partial Details sample:

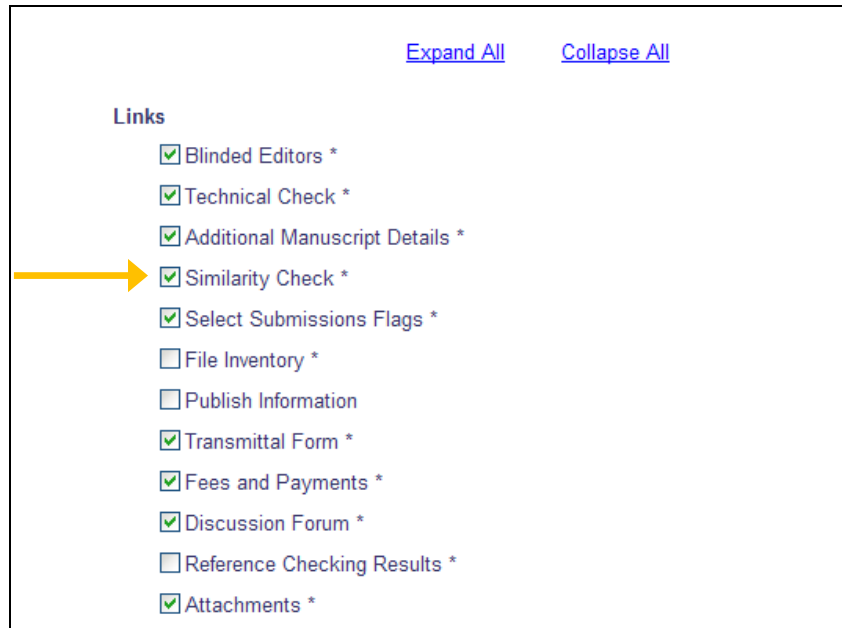
**Details for Manuscript Number: Unassigned
"Testing CrossCheck"**

[Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#)

Additional Manuscript Details:	Add/Edit Additional Manuscript Details
Corresponding Author:	John Adams ,  North Andover, MA UNITED STATES [Proxy]
Corresponding Author E-Mail:	trash1@ariessys.com
Author Comments:	
Short Title:	
Article Type:	News Item
Section/Category:	
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Requested Editor:	
Technical Check:	Technical Check Information
Initial Date Submitted:	07/12/2011
Editorial Status Date:	07/12/2011
Similarity Check:	CrossCheck/iThenticate Results 
Current Editorial Status:	Received by Journal
Attachments:	Attachments
Transmittal Form:	Link to Transmittal Form

TO CONFIGURE:

To display the Similarity Check link on custom *Details* layouts, expand the ‘Links’ section of the ‘Select Items to Display’ page and select ‘Similarity Check’.



Once selected on this page, the Display Order of the items may be updated on the Layout Page.

Search People Notes

New in EM/PM v9.0, Editors with either ‘View People Notes’ or ‘Edit People Notes’ permission enabled now have the ability to search for People, Reviewers, and Authors by using the People Notes field as a selection criteria.

Search for Reviewers:

Search for Reviewers - Manuscript Number STACEYTEST73-D-09-00002
Stacey Lavelle
"New Important Research "

[Manuscript Details](#) [Register and Select New Reviewer](#)

Change Search Type

Search My Publication
 Search for Reviewers from All Reviewers Go

[Help with Searching](#)

[Help with Searching](#) [Insert Special Character](#)

Criterion	Selector	Value	END
Last Name	Contains	<input type="text"/>	END
First Name	Begins With	<input type="text"/>	END
Last Name	Begins With	<input type="text"/>	END
Email Address	Begins With	<input type="text"/>	END
Position	Begins With	<input type="text"/>	END
Department	Begins With	<input type="text"/>	END
Institution	Begins With	<input type="text"/>	END
City	Begins With	<input type="text"/>	END
State	Begins With	<input type="text"/>	END
Country	Begins With	<input type="text"/>	END
Personal Classifications	Begins With	<input type="text"/>	END
Personal Keywords	Begins With	<input type="text"/>	END
People Notes			
Secondary Last Name			

[Register and Select New Reviewer](#)
[Reviewer Selection Summary](#)
[Editor Main Menu](#)

Search People:

Search People

Choose the criterion for selecting People Records.

[Help with Searching](#) [Insert Special Character](#) [Register New User](#)

Criterion	Selector	Value	User Role	END
Last Name	Begins With	<input type="text"/>	ALL	END
Last Name	Begins With	<input type="text"/>		END
First Name	Begins With	<input type="text"/>		END
Institution	Begins With	<input type="text"/>		END
City	Begins With	<input type="text"/>		END
State				
Country				
E-mail Address				
Phone Number				
Personal Classifications				
Personal Keywords				
People Notes				
Registration Date				
Proxy Registration				

[Editor Main Menu](#)
[Production Tasks Menu](#)
[Production Status Grid](#)

Search for Authors:

**Search for Authors - Manuscript STACEYTEST81-D-10-00005
"Proposal for New Research "**

[Manuscript Details](#)

[Help with Searching](#) [Insert Special Character](#)

Criterion	Selector	Value	
Last Name	Begins With	<input type="text"/>	END
Last Name	Begins With	<input type="text"/>	END
First Name	Begins With	<input type="text"/>	END
Position			
Department	Begins With	<input type="text"/>	
Institution			
City			
State			
Country			
People Notes			

[Author Selection Summary](#)
[Editor Main Menu](#)

When Editors use the new ‘People Notes’ criteria in searches and enter a value to search on (for example, People Notes – Contains – Time), the results display all people records where the People Notes contain the term ‘time’. People Notes will only display for Reviewer Results; they are not added to the results pages for Search People or Search Authors.

NOTE: The People Notes field cannot be used for a “wild card” type search; there must be a value entered for the search to properly execute.

TO CONFIGURE:

No configuration required to use this feature on upgrade. Users with either the existing ‘View People Notes’ or ‘Edit People Notes’ permission enabled will have the ‘People Notes’ option available as a search criterion.

Search for Reviewers Results Enhancement

When searching for a Reviewer for a submission, it may be helpful for Editors to see the Institution with which the Reviewer is associated. New in EM v9.0, the Reviewer's Institution is now displayed directly on the *Reviewer Selection Results* page directly under the Reviewer Role. If the Reviewer has no Institution listed on their people record, no information will display.

Partial page display; Search for Reviewers Results page:

Select As			Reviewer Name	Board Member	Classifications*	Reviewer Statistics (Agreed Invitations)		Invitation Statistics											
Inv.	Alt.	Prop.				Reviews in Progress:	Completed Reviews:	Un-assigned After Agreeing:	Terminated After Agreeing:	Last Review Agreed:	Last Review Completed:	Last Review Declined:	Avg Days Outstanding:	Manuscript Rating:	Avg Review Rating:	Outstanding Invitations:	Agreed:	Declined:	Un-invited Before Agreeing:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Emily L Dickinson, MFA (Biostat Reviewer) Mount Holyoke	No	0 Class matches with MS	0	0	0	0	-	-	0	0	0	0	0	0	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Frank Dietrich (Reviewer) University of Luxembourg	No	0 Class matches with MS 1: PHARMACOLOGY (None Selected) 15.200: pharmacology (None Selected)	1	0	0	0	04/29/2008	-	0	0	0	1	2	1	4	8
People Notes: asdfasdf																			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	James Duncan, MD (Biostat Reviewer) University of EM	No	0 Class matches with MS	0	0	0	0	-	-	0	0	0	0	0	0	0	0

TO CONFIGURE:

No configuration is necessary for this information to display. Any Reviewer record with an Institution listed will now show that information when searching for Reviewers.

Automatically Un-Assign Reviewers

In EM v8.2, Publications may configure Article Types to automatically un-invite Reviewers who do not respond to an initial invitation within a specified timeframe. Once a Reviewer has accepted an invitation, Editors can click on the 'Un-invite' link on the *Reviewer Selection Summary* page in order to manually un-invite Reviewers who have failed to submit a review within the timeframe specified for a submission. There is no 'Automatic Un-invite' functionality for these open reviews.

New in v9.0, publications may now configure Article Types to automatically un-assign Reviewers after they have agreed to review, but before they have submitted their review. Administrators may configure a set number of days for Reviewers to submit their review after accepting the invitation by Article Type. This number can further be configured on a per-submission basis on the *Reviewer Selection Summary* page.

NOTE: Administrators may configure the Article Type to also include Reviewers with Partial Reviews saved when automatically un-assigning.

Partial page displayed; new option available in the upper portion of the page:

Reviewer Selection Summary - Submission Betsytest70-D-08-0022
Jumpin Jehosephat, ALO
"I am writing a novel."

[Manuscript Details](#) [Classifications](#)

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 1 [\[Change\]](#) review(s) have been completed.

Automatically un-invite Reviewers who do not respond to an invitation within 0 [\[Change\]](#) day(s).
Set this number to 0 to turn off the automatic un-invitation of invited Reviewers for this submission. [\(less...\)](#)

Automatically un-assign Reviewers who do not complete a review within 0 [\[Change\]](#) day(s) of the review due date.
Set this number to 0 to turn off the automatic un-assign process for Reviewers who have accepted an invitation to review this submission. [\(less...\)](#)

Reviewer Search

Search My Publication Search for Reviewers from All Reviewers

Reviewers can still be manually un-assigned after they have accepted an invitation. New in v9.0, the un-invite link next to these Reviewers is renamed 'Un-assign'.

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers

Robert Referee (Reviewer)	Agreed to Review	Un-assign
Peter Reviewer (Reviewer)	Partial Review Saved	Un-assign
Ron Reviewer (Reviewer)	Reviewer Invited	Un-invite
Rinaldo Reviewer (Biostat Reviewer)	Reviewer Invited	Un-invite

Alternate Reviewers

There are currently no Alternate Reviewers selected for this submission.

Alternate Reviewers must be promoted manually. ([more...](#))

In conjunction with this, all Reviewer Statistics are renamed from ‘Un-invited After Agreeing to Review’ to ‘Un-assigned After Agreeing to Review’.

Sample Reviewer Information:

Current Review Statistics

Date Last Agreed	Reviews in Progress	Outstanding Invitations
06/12/2008	0	0

Historical Reviewer Invitation Statistics

Total Invitations	Agreed to Review	Declined to Review	Un-invited Before Agreeing to Review	Terminated Before Agreeing to Review
122	81	22	4	16

Historical Reviewer Performance Summary

Total Completed Reviews	Submitted on Time	Submitted Late	Un-assigned After Agreeing to Review	Terminated After Agreeing to Review	Date Last Review Completed
78	74	4	1	1	06/12/2008

Historical Reviewer Averages

Days to Respond to Invitation	Days to Complete Review	Days Late	# of Reminders	Manuscript Rating	Review Rating
4	6	-16	0	68.27	78.86

Publications may configure letters to be sent to Reviewers when they are un-assigned after accepting an invitation. If the Reviewer is automatically un-assigned (through the nightly batch process that runs between midnight and 4am US-Eastern Time), the configured letter will be sent to the un-assigned Reviewer. If the Reviewer is manually un-assigned, the user will have the option to customize the letter prior to sending it to the Reviewer.

TO CONFIGURE:

To enable the new Un-Invite Reviewers after accepting an Invitation feature, go to PolicyManager, Edit Article Type, and edit an existing Article Type (or Add a new Article Type). In the ‘Reviewer Parameters’ section, enter a number greater than 0 for the number of days after which a Reviewer will be un-assigned in the “Automatically Un-assign Reviewers n days after ‘Date Review Due’” field. A value of 0 in this field will turn the feature off for this Article Type. On upgrade, this field has a value of 0 for all Article Types.

Value of 0 entered – feature is turned off:

Reviewer Parameters:	New and Revised Submissions	
Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.	<input type="text" value="1"/>	Must be 0 or greater.
Number of Days Reviewer has to Respond to Invitation:	<input type="text" value="0"/>	Set this value to zero to turn off the automatic un-invitation process for all Reviewers who have not responded to an invitation.
Automatically Un-assign Reviewers n days after 'Date Review Due'	<input type="text" value="0"/>	Set this value to zero to turn off the automatic un-assign process for all Reviewers who have accepted an invitation but not submitted a review on time.
Automatically Un-assign late Reviewers with partial review saved.	<input type="checkbox"/>	Select this box to automatically un-assign late Reviewers even if they have a partial review saved.
Automatically Promote Alternate Reviewers:	<input type="checkbox"/>	Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines or is un-invited.
Set the values required for a new and/or revised manuscript	New Submission	Revised Submission
Days to Review This Article Type:	<input type="text" value="5"/>	<input type="text" value="5"/>

When a value greater than 0 is entered in this field, a sub-option called “Automatically Un-assign late Reviewers with partial review saved” is available for selection. When this box is selected/checked, Reviewers will be un-assigned even if they have a partial review saved.

Value greater than 0; feature is enabled – user has enabled sub-option as well:

Reviewer Parameters:	New and Revised Submissions	
Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.	<input type="text" value="1"/>	Must be 0 or greater.
Number of Days Reviewer has to Respond to Invitation:	<input type="text" value="0"/>	Set this value to zero to turn off the automatic un-invitation process for all Reviewers who have not responded to an invitation.
Automatically Un-assign Reviewers n days after 'Date Review Due'	<input type="text" value="5"/>	Set this value to zero to turn off the automatic un-assign process for all Reviewers who have accepted an invitation but not submitted a review on time.
Automatically Un-assign late Reviewers with partial review saved.	<input checked="" type="checkbox"/>	Select this box to automatically un-assign late Reviewers even if they have a partial review saved.
Automatically Promote Alternate Reviewers:	<input type="checkbox"/>	Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines or is un-invited.
Set the values required for a new and/or revised manuscript	New Submission	Revised Submission
Days to Review This Article Type:	<input type="text" value="5"/>	<input type="text" value="5"/>

To configure letters to be delivered to Reviewers when they are un-invited after accepting an invitation (un-assigned), go to ActionManager, select the desired role, and scroll to the 'Reviewer Assigned' section. The new 'Un-assign Reviewers After Agreeing to Review' event is listed under the existing (renamed) 'Un-invite Reviewers Before Agreeing to Review' event.

On upgrade to v9.0, any letter configured for the existing 'Un-invite...' event is also configured for the new event.

Partial page display; ActionManager:

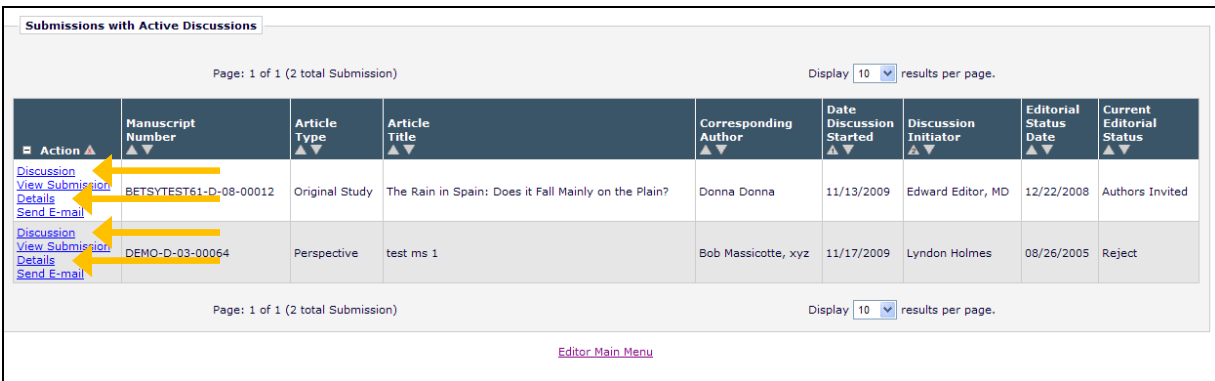
Event	Reviewer Letters
Request Unregistered Reviewer	NONE
Reviewer Invited	Reviewer Invitation
Reviewer Agree	Reviewer Instructions and Due Date
Reviewer Decline	NONE
Un-invite Reviewers Before Agreeing to Review	NONE
Un-assign Reviewers After Agreeing to Review	NONE
Promote Alternate Reviewers	Reviewer Invitation
Review Assignment Completed	Reviewer Thank You
Required Reviews Complete	NONE

Additional Discussion Forum Action Links

Some publications use the Discussion Forum feature for submissions as soon as they are received, before an Editor is assigned. New in EM/PM v9.0, publications may configure the Discussion Forum feature to allow discussion participants to have access to the Details link from the *Submissions with Active Discussions* folder and from the *Discussion* page even if they are not in the Editor chain, or do not have ‘View All Submissions’ permission or have ‘Search All Manuscripts’ permission within the specific discussion.

The *Submissions with Active Discussions* folder is enhanced with the following Action Links:

- The View Submission link is displayed for all submissions listed on the page
- The Details link is displayed if:
 - The logged in user is in the Editor chain for the current version of the submission OR
 - The logged in user is in the Editor chain of the parent submission for which this is a child (i.e., this submission is an invited submission)
 - The logged in user has permission to ‘View All Submissions’ OR
 - The logged in user has permission to ‘Search All Manuscripts’ OR
 - The new “Display 'Details' link in Submissions with Active Discussions folder and on Discussion page” option is enabled



The screenshot shows a web interface titled "Submissions with Active Discussions". It displays a table with two rows of submission data. Each row has a set of action links on the left: "Discussion", "View Submission", "Details", and "Send E-mail". Yellow arrows point to the "Details" link in both rows. The table columns are: Action, Manuscript Number, Article Type, Article Title, Corresponding Author, Date Discussion Started, Discussion Initiator, Editorial Status Date, and Current Editorial Status. The first row shows a submission with manuscript number BETSYTEST61-D-08-00012, titled "The Rain in Spain: Does it Fall Mainly on the Plain?". The second row shows a submission with manuscript number DEMO-D-03-00064, titled "test ms 1".

Action	Manuscript Number	Article Type	Article Title	Corresponding Author	Date Discussion Started	Discussion Initiator	Editorial Status Date	Current Editorial Status
Discussion View Submission Details Send E-mail	BETSYTEST61-D-08-00012	Original Study	The Rain in Spain: Does it Fall Mainly on the Plain?	Donna Donna	11/13/2009	Edward Editor, MD	12/22/2008	Authors Invited
Discussion View Submission Details Send E-mail	DEMO-D-03-00064	Perspective	test ms 1	Bob Masicotte, xyz	11/17/2009	Lyndon Holmes	08/26/2005	Reject

Additionally, the Details link now appears on the *Discussion* page under the same conditions as listed above.

Discussion page:

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

Please discuss. Be aware people can read this.

[View Submission](#) [View Reviews and Comments](#) [File Inventory](#) [Details](#)

[View/Print All](#)

Participant	Comments	Date
Edward Editor, MD	Has anybody seen a study similar to this recently?	11/30/2009
Lyndon Holmes	Does this test seem sound?	11/17/2009

TO CONFIGURE:

To enable the Details link to display for users on the *Discussion* page where the user is not in the Editor Chain for a submission, go to PolicyManager and click the Configure Discussion Forum Settings link. The new “Display ‘Details’ link in Submissions with Active Discussions folder and on Discussion page” option is displayed under the ‘Custom Instructions’ box.

Configure Discussion Forum Settings

Custom Instructions

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

[Insert Special Character](#)

Please discuss.

Display 'Details' link in Submissions with Active Discussions folder and on Discussion page.

Select the Details Page Layout that the participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts.'

Editorial Details Layout Configured for the Editor's Role
 ▼

Select Discussion Forum Letters

Ask Editor to Participate

Discussion Forum - Invitation
▼

NOTE: If the logged in Editor is in the chain for the current version of the submission or has 'View All Submissions' permission or has 'Search All Manuscripts' permission, but the "Display 'Details' link in Submissions with Active Discussions folder and on Discussion page" option is not enabled, being assigned to the paper or having these permissions supersedes this new configuration option (i.e. the Details link displays if the Editor is in the chain or has either of these permissions, even if the configuration option is not enabled).

NOTE: Publications might want to create a custom *Details* page layout for Editors that are not in the Editor chain to provide access to pertinent submission details.

View / Print All Discussion Forum Comments

In EM/PM v8.2, publications may use the ‘Discussion Forum’ feature to allow less formal collaborative discussions about a paper outside of the peer review process. New in v9.0, a ‘View/Print All’ button is added to the *Discussion* page to allow users to view all expanded posts. This also allows users to print the entire discussion, if desired.

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](#)
 [Details](#)

Participant	Comments	Date
Emily Editor, MD	Checked with my friend. She is currently in Spain for an extended (more...)	Jan 04 2010 01:57PM
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 (more...)	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

Clicking the ‘View/Print All’ button navigates the Editor to a page where the discussion posts are expanded, and the page can be printed by clicking the ‘Print All’ button.

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

Participant	Comments	Date
Emily Editor, MD	Checked with my friend. She is currently in Spain for an extended holiday; but she is going to get data for me by the end of the week!	Jan 04 2010 01:57PM
Emily Editor, MD	Annie is right; I've not been to Spain, but have a friend who has studied the terrains. I will confer with her.	Nov 30 2009 04:22PM
Annie The Dog, PhD	Spain is rather large; there may be many microclimates to be considered? Worth investigating.	Nov 30 2009 04:21PM
Edward Editor, MD	Can you provide any information I may not have considered on this topic?	Nov 13 2009 03:24PM

NOTE: There is no column sorting available on this page; the sort order displayed on the main *Discussion* page when the ‘View/Print All’ button is clicked is carried over to this version of the page.

TO CONFIGURE:

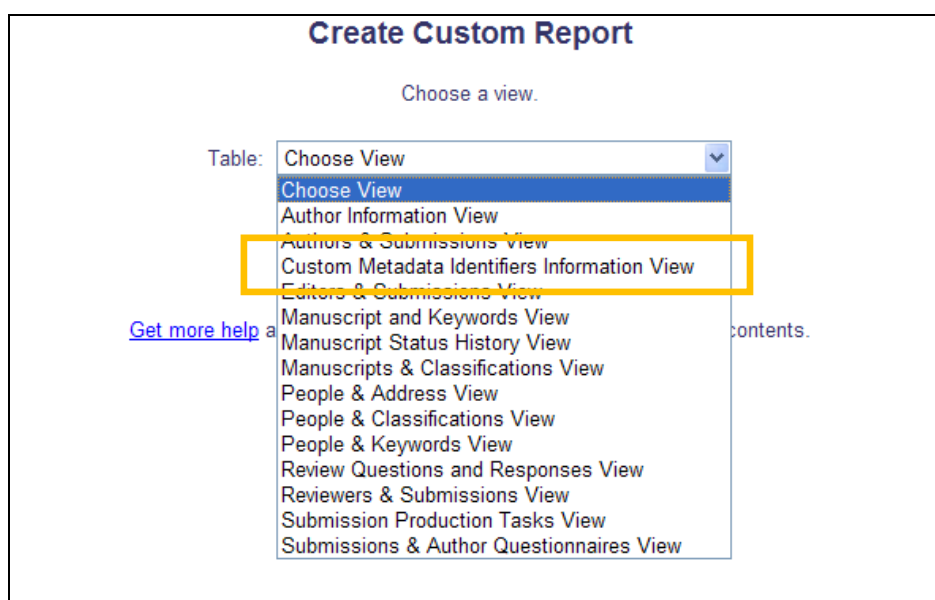
No configuration is required to use this new feature. Publications using the Discussion Forum feature will have this new functionality available on upgrade.

Transmittal ID

In EM/PM v8.2, Custom Submission Questions and Additional Manuscript Details (AMD) may be included in XML files created using the “NLM 3.0 DTD v2” EM/PM transmittal method. This transmittal method may be used for either Submission Production Task transmittal or transmittal of the manuscript from the editorial process to a production vendor. However, with the exception of a few specific AMD fields, these custom fields are included in the XML by using the generic <custom-meta> element.

New in v9.0, Transmittal ID fields are added for both Additional Manuscript Details and Custom Submission Questions to allow users to identify each <custom-meta> element in the XML. When submissions or tasks are transmitted using the “NLM 3.0 DTD v2” transmittal method, the stored value will be written to the id attribute of the <custom-meta> element for Additional Manuscript Details and Custom Submission Questions included in the transmittal.

To aid in viewing the IDs that have been assigned and the AMD or Custom Submission Question with which they are associated, a new Custom Metadata Identifiers Information View has been included in Custom Reports.



The following fields are available in the Custom Metadata Identifiers Information View:

Custom Metadata Identifier ID [TRANSMITTAL_CUSTOM_IDENTIFIER.TRANSMITTAL_CUSTOM_ID]
Uniquely identifies each record in the Custom Meta Identifiers table
Hints: This field is NOT the Custom Metadata ID. It is an internal field used to link to other tables (Additional Manuscript Details Fields and Custom Submission Questions)

Custom Metadata ID [TRANSMITTAL_CUSTOM_IDENTIFIER.VALUE]
This custom ID is used to uniquely identify either an Additional Manuscript Detail Field or a Custom Submission Questionnaire Question in the XML file transmitted from EM.
Hints: This field must be unique within the scope of a single Journal database. It may not be more than 128 characters and must be a valid XML name. I.e. It must begin with a letter and may only

contain letters and symbols in the following sets: A-Z, a-z, 0-9, the symbols ".", "-", or "_", any character in the Unicode ranges [#x0300-#x036F] and [#x203F-#x2040].

Original ID [VIEW_TRANSMITTAL_CUSTOM_IDENTIFIER_MAP.REFERRED_ID]

This is the Custom Submission Question or Additional Manuscript Detail's unique identifier in the Custom Submission Question or Additional Manuscript Details Fields tables, respectively.

Hints: This ID may be used to look up more information about the question or AMD in the appropriate table. To determine whether this record is a Custom Submission Question or an AMD, reference the Metadata Type field for this record.

Original Description [VIEW_TRANSMITTAL_CUSTOM_IDENTIFIER_MAP.REFERRED_DESCRIPTION]

This is the text of the Custom Submission Question or the Additional Manuscript Detail's description

Hints: To determine whether this is a Custom Submission Question or an AMD, reference the Metadata Type field for this record.

Metadata Type [VIEW_TRANSMITTAL_CUSTOM_IDENTIFIER_MAP.REFERRED_TYPE]

If this field is equal to '1', this record is an Additional Manuscript Detail Field. If it is equal to '2', this record is a Custom Submission Question.

TO CONFIGURE:

To associate Transmittal IDs with Additional Manuscript Details (AMD), go to PolicyManager, click [Add/Edit Additional Manuscript Detail Fields](#), and edit an existing AMD or add a new AMD. In the 'Options' section of the configuration page, a new 'ID' field is added to the 'Transmittal Form' row. Enter a unique ID up to 128 characters in length.

Edit Additional Manuscript Detail Field

Field Description: [Insert Special Character](#)

TEXT-PAGES
Maximum 256 characters

Field Type:

Maximum Field Length:

Default Value for Field:
If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.

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

Original Study
 Editorial
 Review
 Rapid Communication

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

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

Options

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

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

To associate Transmittal IDs with Custom Submission Questions, go to PolicyManager, click [Create Custom Submission Questions](#), and edit an existing Question or add a new Question. In the 'Options' section of the configuration page, a new 'ID' field is added to the 'Transmittal Form' row. Enter a unique ID up to 128 characters in length.

Edit Custom Submission Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of an Author Questionnaire used at the Additional Information step in the Submit Manuscript function. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Custom Submission Question is no longer available for selection in an Author Questionnaire.

Author responses must be configured to use a specific Response Type: **Text** and **Notes** responses can contain any mix of characters and numbers. A **Date** response must be entered in a mm/dd/yyyy format. **Integer** and **Decimal** responses can contain only a number or decimal point. A **List** response requires the Author to select from a list of responses configured by the Site Administrator.

You may then specify if the field should be displayed on the Transmittal Form, and whether the field is required and/or editable on the Transmittal Form. Help Text on the Transmittal Form is optional.

Cancel Submit

Question: [Insert Special Character](#)

What is your favorite color?

Instructions for Author Response: [Insert Special Character](#)

Hide: When you **Hide** a Custom Submission Question, the question is deactivated (not available for use with new Author Questionnaires).

Response Type: Text

200

Maximum Field Length: (A value from 1 to 200)

Default Value for Field: None Single Value (enter value below)

If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.

[Insert Special Character](#)

Options:
Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

Page	Hide	Editable	Required	Help Text
Manuscript Details	<input type="checkbox"/>	N/A	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Insert Special Character
PDF Cover Page	<input checked="" type="checkbox"/>	N/A	N/A	N/A

Cancel Submit

The ID must be unique within a publication; Additional Manuscript Details and Custom Submission Questions may not have the same ID. Additionally:

- A. The ID cannot exceed 128 characters
- B. The ID must start with a letter
- C. The ID may only contain the following characters:
 - a. The Latin numerals 0-9
 - b. The letters a-z (capital or lowercase)
 - c. The symbol “.”
 - d. The symbol “-“
 - e. The symbol “_“
 - f. Any letters or symbols in the Unicode character ranges [#x0300-#x036F] or [#x203F-#x2040]

To generate a report displaying all currently configured Transmittal IDs, go to Custom Reports, select the ‘Custom Metadata Identifiers Information View’, and select the desired fields for the report.

Review Form Enhancements

In EM v8.2, system administrators are able to customize the Review Form to include multiple questions in varying formats. These Custom Review Questions can be configured to display on the Review Form in addition to the existing ‘Reviewer Blind Comments to Author’ and ‘Reviewer Confidential Comments to Editor’ text boxes. Questions configured to be of a ‘Text’ or ‘Notes’ response type may be configured with a maximum number of characters allowed for the response. The display order of the parts of the Review Form may be adjusted for each form; Custom Review Questions, Manuscript Rating Questions, and Comments to Authors and Editors.

New in EM v9.0, publications are given additional ways to configure each Review Form.

1. Publications may now configure the ‘Reviewer Blind Comments to Author’ and ‘Reviewer Confidential Comments to Editor’ fields so that they do not display on a Review Form, allowing Reviewers to provide information exclusively using the Custom Review Questions.
2. When using Custom Review Questions of a ‘Notes’, ‘Text’, or ‘Yes/No/Text’ type, a Minimum Character Count may be configured. When configured, if the question is displayed but not required on a Review Form, the Reviewer may leave the response blank. If, however, the Reviewer chooses to answer the question, then the minimum character count must be met, even if the question is not required. Additionally, the response boxes for ‘Yes/No/Text’ and ‘Notes’ fields will now auto-expand as Reviewers type information. If the Reviewer enters more than 25 lines of text, scrolling within the box is invoked.
3. Publications may also configure the Reviewer Instructions to display on the Review Form itself, rather than via the ‘Reviewer Instructions’ button. This feature enables publications to have all information for the Reviewer listed on one page for ease of reference. The order in which the Reviewer Instructions display on the Review Form may also be configured.

Sample page; Instructions displayed on the page, 'Reviewer Blind Comments to Author' and 'Reviewer Confidential Comments to Editor' text boxes hidden, and minimum character count applied to the displayed question:

Reviewer Recommendation and Comments for Manuscript Number Betsytest82-D-11-00008

This is the Case of the Missing error message

Original Submission
Robert Referee, MD (Reviewer 1)

Recommendation: Overall Manuscript Rating (1-100):

Buttons: Cancel, Save & Submit Later, Upload Reviewer Attachments, Proof & Print, Proceed

Reviewer Instructions
Demonstration of in-line displayed instructions.

Review Questions
*Please give a frank account of the strengths and weaknesses of the article: (Limit 25 to 20000 Characters) [Insert Special Character](#)

Character Count: 0

Manuscript Rating
Please rate the submission using the scales that are provided and please be honest.

The conclusions were supported by the data. (1 is not supported, 10 is highly supported)

Scale: N/A 1 2 3 4 5 6 7 8 9 10

Buttons: Cancel, Save & Submit Later, Upload Reviewer Attachments, Proof & Print, Proceed

TO CONFIGURE:

To configure a minimum character count for a 'Notes', 'Text', or 'Yes/No/Text' type question, go to *PolicyManager*, Create/Edit Custom Review Questions, and edit an existing question, or add a new question. On the configuration page, enter a value in the "Minimum Field Length" field.

NOTE: The Minimum Field Length must be less than the Maximum Field Length.

NOTE: On upgrade, the Minimum Field Length is set to '0' for all existing questions. This is also the default value for any newly added questions. If a Custom Review Question is configured as "Required", a response is required even if the minimum here is set to '0'.

Add Custom Review Question

Enter the question, default response text (if required), and any instructions to be displayed as part of the Review Form used at the Submit Recommendation step of the review process. The Hide checkbox allows inactivation of an obsolete question. Once hidden, a Review Question is no longer available for inclusion in new Review Forms.

[MIDDLE OF PAGE NOT CHANGED]

Hide: When you **Hide** a Custom Review Question, the question is deactivated (not available for use with new Review Forms).

Response Type: Notes

Minimum Field Length: 0
(Must be less than or equal to the Maximum Field Length)

Maximum Field Length: 5000
(A value from 1 to 20000)

Default Value for Field: None
 Single Value (enter value below)

To configure changes to the Review Form, go to *PolicyManager*, [Create/Edit Review Forms](#). To display Reviewer Instructions directly on the Review Form page, uncheck/deselect the ‘Display Reviewer Instructions in popup’ checkbox.

NOTE: On upgrade, this box is selected/checked, so Reviewer Instructions continue to display as a pop-up unless explicitly changed by the publication.

To suppress either the ‘Reviewer Blind Comments to Author’ field or ‘Reviewer Confidential Comments to Editor’ field, uncheck/deselect the ‘Display Comments to Author text box’ or ‘Display Comments to Editor text box’ respectively.

NOTE: On upgrade, these boxes are selected/checked by default so the text boxes continue to display.

NOTE: When these configurations are changed, the changes do not apply to reviews already In Progress.

The Reviewer Instructions are added to the list of Review Form sections that can have the display order customized. On upgrade, the Reviewer Instructions are configured to display at the top of each Review Form.

Edit Review Form

Review Form Name:

Hide - When you Hide a Reviewer Form, the form will be deactivated (not available for use with any Article Types).

Reviewer Instructions:

Display Reviewer Instructions in popup

[Insert Special Character](#)

Please answer the questions in the 'Blind Comments to Author' section of the page.

Custom Review Questions

Select Questions

No Custom Review Questions have been added to this Form

Display Comments to Author text box

Default Text for Comments to Author:

[Insert Special Character](#)

Display Comments to Editor text box

Default Text for Comments to Editor:

[Insert Special Character](#)

For each question, please use the following scale to answer (place an x in the space provided):

"To what extent does the article meet this criterion?"

0 Fails by a large amount

The following sections may be displayed to the Reviewer on the Reviewer Recommendation Page. Please select the order in which you would like them to appear. Note that Manuscript Rating Questions are configured elsewhere and do not appear for revisions. This setting determines where they will display on the Review Form only when applicable.

Order	Review Form Section
<input type="text" value="1"/>	Reviewer Instructions
<input type="text" value="2"/>	Custom Review Questions
<input type="text" value="3"/>	Manuscript Rating Questions
<input type="text" value="4"/>	Comments to Authors and Editors

Update Order

Cancel

Submit

[Create/Edit Custom Review Questions](#)

[Match Review Forms to Article Types and Reviewer Roles](#)

[Return to PolicyManager](#)

PRODUCTION TRACKING ENHANCEMENTS

Automatic CC on Production Letters

New in EM/PM v9.0, System Administrators may define one or more e-mail addresses to be automatically carbon copied or blind carbon copied for letters in the Production and Production Reminder families.

When a letter is configured with the new ‘Send Copies to the following addresses’ option, then any e-mail addresses listed on the letter template will be sent either a carbon copy (CC) or blind carbon copy (BCC) of the e-mail letter.

Partial assignment letter display:

From: "The PM DEMO Journal" <trash1@ariessys.com>
To: **Four T. Editor, none**
Letter Purpose: Artwork Correction Assignment
Letter Subject: Artwork Correction Assignment

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc: bcc:
✓ Joe@Journal.jo
✓ Editor@editor.ed

cc:
bcc:

Letter Body: [Insert Special Character](#) [Preview Letter](#) [Open in New Window](#)

Ref.: Ms. No. DEM02

TO CONFIGURE:

In PolicyManager, [Edit Letters](#), select the letters in either the Production or Production Reminders letter families to be modified with the new settings. Select the box next to the desired field (CC or BCC), and enter the e-mail addresses to be copied on this letter when it is sent.

Edit 'Production' Letter

Letter Purpose:

Subject:

Letter Family:

Sender's E-mail Address:

Use E-Mail address of user triggering the Correspondence
 "The EM DEMO Journal" <trash1@ariessys.com>
 "The PM DEMO Journal" <trash1@ariessys.com>
 Use Corresponding Editor's E-mail address
 Use Corresponding Production Editor's E-mail address

Additional Recipients

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

Automatically cc: bcc:

All Co-Authors
 Corresponding Editor
 Corresponding Production Editor

Send copies to the following addresses:
(Multiple addresses may be entered, separated by a semicolon)

cc:

bcc:

Allow choice on 'Send Letter' page: The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:

Display checkbox for co-Authors

NOTE: Multiple addresses must be separated by a semicolon (;).

Default Sender's E-mail Address for Production Letters

In EM/PM v8.2, publications define an e-mail address that displays as the publication's "From" address. Many letters generated by the system can be configured to use this address as the sender's address.

Publications that use PM in addition to EM may require two e-mail addresses; one for the Editorial correspondence, and one for Production correspondence. New in EM/PM v9.0, publications may now configure two E-mail "from" addresses: the existing address for Editorial, and a new option for Production.

TO CONFIGURE:

Publications with Production Tracking enabled will have a new 'Production "E-mail From" Address' option on the *Set "E-mail From" Address* page in PolicyManager. On upgrade to v9.0, the e-mail address that is currently entered in the Editorial Manager "E-mail From" Address box is copied to the Production configuration box.

Set "E-mail From" Address

All e-mail messages generated by Editorial Manager or Preprint Manager - Production Tracking need an e-mail address to indicate who sent the message. The sender's email address is configured on individual letter templates.

You may customize the 'E-mail From' name that appears on the message. This is also the name displayed in the 'Reply To' field if the recipient responds to the message. For example, if you want 'The Journal' to appear in the 'E-mail From' field on the message, the address must be entered in the following format:
"The Journal" <editorialoffice@thejournal.com>

If you want the e-mail address to appear in the 'E-mail From' field on the message, simply enter the e-mail address:
editorialoffice@thejournal.com

Letters generated by Editorial Manager may be configured to use the Editorial "E-mail From" Address as the sender of the message. In addition, many system-generated e-mails will use this address as the primary contact address for the publication.

Letters generated by Preprint Manager - Production Tracking may be configured to use the Production "E-mail From" Address as the sender for letters in the Production or Production Reminder families.

Editorial "E-mail From" Address:

Production "E-mail From" Address:

To select the new address as the 'From' address for letters in either the Production or the Production Reminder letter families, go to PolicyManager, [Edit Letters](#), and edit an existing letter in one of those families, or add a new letter.

Add 'Production' Letter

Please type (or paste) a text-formatted letter into the Letter Body box below. This default letter should not include HTML tags. To incorporate HTML tags, click 'Save' on this page to save the text-formatted letter and then select the 'HTML format' radio button from the 'Edit Letters' page and click the Edit link. HTML tags may then be added.

Letter Purpose:

Subject:

Letter Family: ▼

Sender's E-mail Address: Use E-Mail address of user triggering the Correspondence

"The EM DEMO Journal" <trash1@ariessys.com>

"The PM DEMO Journal" <trash1@ariessys.com>

Use Corresponding Editor's E-mail address

Use Corresponding Production Editor's E-mail address

Additional Recipients

Assign Production Task Without File

In PM v8.2, Submission Production Tasks and Schedule Group Production Task may be configured to transmit the task via FTP. When this is configured, PM requires the selection of assignment files; a task cannot be assigned without the user selecting an assignment file.

New in v9.0, users may configure Production Tasks (of both types) so that assignment files are not required when FTP is configured.

NOTE: PM v8.2 allows a user to assign a Submission Production Task and a Schedule Group Production task without selecting an assignment file, as long as the task is not configured with an FTP export/transmittal method. This functionality is unchanged in v9.0.

TO CONFIGURE:

A new “Allow task assignment and FTP without Assignment Files” checkbox is added to the Add/Edit Submission Production Task and the Add/Edit Schedule Group Production Task pages in PolicyManager. This checkbox is not selected on upgrade to v9.0, and is also not selected by default for any new Production Tasks.

Sample page – Submission Production Task with new feature disabled:

Edit Submission Production Task

Cancel Submit

[Insert Special Character](#)

New Production Task Name: Copyedit
Maximum Production Task Name is 100 characters

[MIDDLE OF PAGE NOT DISPLAYED]

FTP Options

Submission Production Task Transmittal Method: None

Allow task assignment and FTP without Assignment Files

FTP Server address (e.g. ftp.ariessys.com):

Username:

Password:

Subdirectory:

E-mail Address (for transmittal notification):

Submission Production Task Import Profile: None

E-mail Address (for import notification):

XML file is required

Sample page – Submission Production Task with new feature enabled and selected. Note that the field is only available for selection once a transmittal method has been selected:

Edit Submission Production Task

[Insert Special Character](#)


New Production Task Name:

Maximum Production Task Name is 100 characters

[MIDDLE OF PAGE NOT DISPLAYED]

FTP Options

Submission Production Task Transmittal Method:

 Allow task assignment and FTP without Assignment Files

FTP Server address (e.g. ftp.ariessys.com):

Username:

Password:

Subdirectory:

E-mail Address (for transmittal notification):

Submission Production Task Import Profile:

E-mail Address (for import notification):

XML file is required

When configured for either a Submission or Schedule Group Production Task, users will be able to assign a task without being required to select one or more Assignment Files. In this case, a .go.xml file will be ftp'ed out. A zip file will be ftp'ed out only if the Submission Production Task Transmittal Method selected includes a metadata XML file. The metadata XML file will be the only file included in the zip file.

Automatically Select Files on Task Assignment

New in PM v9.0, submission production tasks may be configured to automatically select certain types of files as Assignment files when a task is being assigned. This is especially useful when used in conjunction with the new “Automatically Assign Next Production Task” feature.

When the new ‘Automatically Select Files for Assignment’ option is enabled for a Submission Production Task, then when that Submission Production Task is assigned manually, all non-hidden files of the selected item types (if any) are pre-selected, i.e. their ‘Allow Download’ checkbox is set/checked.

NOTE: Some types of tasks require a file to be selected (those configured for FTP transmittal where the new ‘Allow task assignment and FTP without Assignment Files option is not set).

Partial page displayed; ‘Manuscript’ and ‘Original Manuscript (P)’ configured to be automatically selected:

Submission Files							
Item	Description	Item Family	File Name	Size	Last Modified	QC Results	Allow Download
PDF	PDF					N/A	<input type="checkbox"/>
Manuscript	Manuscript	Default	Manuscript.txt	11.8 KB	Oct 17 2007 9:14AM	N/A Tested	<input checked="" type="checkbox"/>

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

Companion Files										
Color Code	Item	Description	Item Family	File Name	Size	Last Modified	Uploaded By	QC Results	Allow Download	Action
	Original Manuscript (P)	Checked and initial edits	Document	PROOF-This is a manuscript with a really obvious title.doc	19 KB	May 19 2006 1:47PM	John MacJohn, Editorial Office	N/A Error	<input checked="" type="checkbox"/>	
	Original Figure (P)	Fig 1	Figure	surgery.gif	92 KB	Apr 20 2006 9:28AM	John MacJohn, Editorial Office	Untested	<input type="checkbox"/>	

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

[Upload New Companion File](#)

[Cancel](#) [Assign Task and Send Letter](#)

When a Submission Production Task is assigned automatically, all files of the selected item type are automatically included in the task assignment.

NOTE: It is possible for a task to be configured with both ‘Automatically Select files for Assignment’ and the FTP-related ‘Allow task Assignment and FTP without Assignment Files’ setting. If this task is assigned automatically, then it will include files of the configured types if present, but if not then the task assignment is completed with no assigned files.

HINT: Using the ‘Limit the Submission Item Types that can be uploaded when Task is Submitted:’ option on the previous production task in the list or named workflow will ensure that

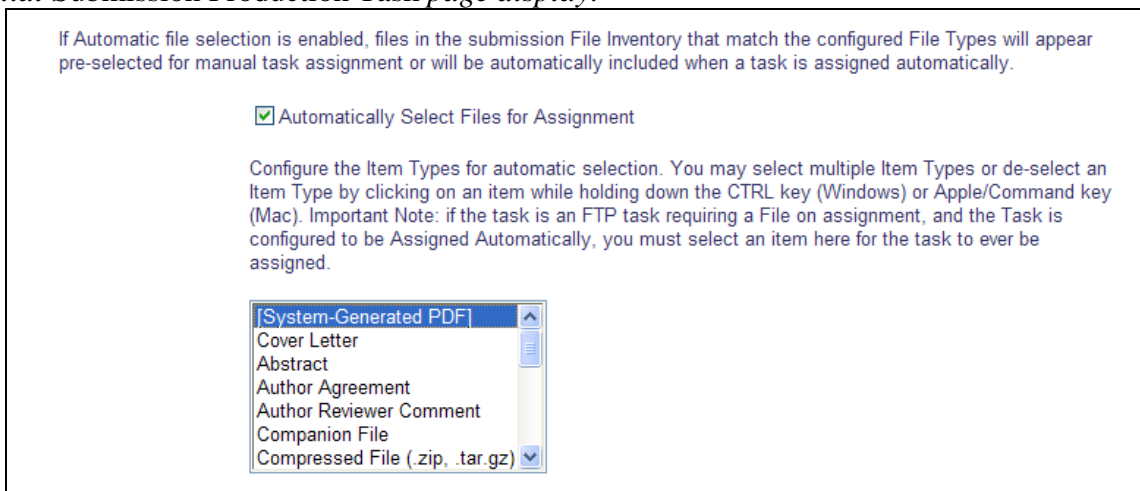
any file uploaded on that task will be selected on this task. This works for manual submissions, but is especially useful when managing automated task assignments.

TO CONFIGURE:

To configure a task to automatically select assignment files, go to PolicyManager, Configure Submission Production Tasks, and edit an existing task (or add a new task). On the configuration page, select/check the new ‘Automatically Select Files for Assignment’ option.

When checked/selected, this option enables a multi-selector menu listing all Submission Item types (including Companion Files), as well as a system-generated PDF option. Matching files in the submission File Inventory will become Assignment Files for the task.

Partial Submission Production Task page display:



Automatically Assign Next Production Task

Currently in PM v8.2, when a Submission Production task is submitted to the system, users may be permitted to immediately assign a Follow-On task assignment. While this can be used to streamline the process of assigning the next task, this is only applicable where the person who submits one task is the right person to be assigning the next task in the list, and it requires the user to be logged into PM to initiate the next assignment. If the task is submitted by FTP transmittal, no follow-on Task can be assigned.

New in PM v9.0, Publications may configure tasks to be automatically assigned upon completion of an initial task. Whenever any task is submitted, the system checks whether the next task in line should be automatically assigned, and automatically assigns this next task if it is.

When a Submission Production Task is set to be automatically assigned, publications must select a specific assignor (one person who will be considered the person who assigned the task) and one assignee (one person to whom the task will always be automatically sent).

When a user submits a Submission Production Task, the system will automatically check the next Task (either based on Submission Production Task order or the Workflow defined for the Article Type of the submission). If the next in line Task is configured to be automatically assigned, the Task assignment letter will be sent to the defined recipient, and the Submission Task assignment record will be created.

NOTE: If the Automatic Task Creation is unsuccessful (for example, if a required file type cannot be found), then an e-mail notification is delivered to the publication's configured Production-Specific E-Mail From address (see the Default Sender's E-mail Address for Production Letters section of these release notes).

TO CONFIGURE:

To configure a task to be automatically assigned, go to PolicyManager, [Configure Submission Production Tasks](#), and edit an existing task (or add a new task). On the configuration page, select/check the new 'Assign Automatically when previous Task submitted' option. When selected, the 'Can be Assigned by' and 'Can be Assigned to' options will refresh to display the available user records for the selected Roles.

Edit Submission Production Task

[Insert Special Character](#)

New Production Task Name:

Maximum Production Task Name is 100 characters

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

Assignment Options

Automatic Assignment is triggered when the Production Task immediately preceding this one is submitted. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

Assign Automatically when previous Task is Submitted

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

Production Task [Insert Special Character](#)

Custom Instructions:

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

Can be Assigned by:

Artwork Editor
Managing Editor
Production Team

Mary François Smith, Managing Editor
Geraldine Ferraro, Managing Editor

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

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

Artwork Editor
Copyeditor
Managing Editor
Compositor
Production Team

Suzie Chapstick, Copyeditor
Jen Editor, Copyeditor

Only one person can be selected as the 'Can be Assigned by' option, and only one person can be selected as the 'Can be Assigned to' option.

NOTE: The selection of a 'Can Be Assigned By' individual does not mean this task can only be triggered by a task submitted by that individual. Rather, that individual will display as the assignor of the task.

The person who submits a task that then triggers an Automatic Task Assignment is NOT considered to be the assignor – that will always be the individual selected under the Can Be Assigned By option above. This means that an Author can submit a task that then triggers automatic assignment of the next task, as the Author is not the assignor.

The order in which the tasks are listed in the main list of Submission Production Tasks, and in every Submission Workflow, should be checked to determine which task will be the one to trigger this task in each workflow. Tasks may need to be reordered to place the correct trigger task immediately before the triggered task.

NOTES:

- To have Task A always followed by Task B, and have Task B assigned automatically, make sure that Task B is displayed immediately beneath Task A in every workflow where they are both displayed.
- If a task (Task B) is assigned automatically, then if the preceding task (Task A) is assigned a second time, a second example of Task B will be assigned automatically when the second iteration of Task A is submitted.
- Use Submission Workflows if there are tasks that are assigned automatically for some article types, but not others.
- If a particular Task is configured to be assigned automatically, it will be assigned automatically in all Submission Workflows in which it appears. This will be triggered by whatever task type appears before it in each workflow, or in the main list of production tasks for submissions with Article Types configured to use all tasks.
 - The exception is where the task is the first task type in the workflow – that can never be assigned automatically, as there is no preceding task in the list to be submitted.

Deposit Submissions to PubMed Central

The U.S. Public Access Policy ensures that the public has access to the published results of National Institutes of Health (NIH)-funded research. It requires scientists to submit final peer-reviewed journal manuscripts that arise from NIH funds to the digital archive PubMed Central (PMC) (<http://www.ncbi.nlm.nih.gov/pmc/>). The Policy requires that these final peer-reviewed manuscripts be accessible to the public on PubMed Central to help advance science and improve human health.

New in PM v9.0, Publications may configure a Submission Production Task to FTP the submission files to the National Institutes of Health Manuscript Submission System (NIHMS), using the publisher's existing NIHMS login credentials. The NIHMS then creates a PDF for approval by the Author, and deposits the PDF to PubMed Central.

NOTE: The Author approval and PMC deposit is done outside of the EM/PM system.

NOTE: A publication cannot use this method to deposit to NIHMS if they are participating in PMC.

If the publication is not participating in PMC, they are eligible to use this new method as follows:

- The publication must be recognized by the NLM.
- The publication must have an account with the NIHMS.
- The publication must configure a Submission Production Task as described in the “To Configure” section below.
- The publication must enter their NLM TA code into a custom transmittal field as described in the “To Configure” section below.
- The publication must ensure that file descriptions are unique for all files within a file type (i.e. all Submission Items in the Figure family must have different file descriptions (if selected as Assignment Files), all Submission Items in the Table family must have different file descriptions etc.)
- The NIHMS requires a file from the Default or Document Submission Item family to be sent to them, along with any relevant figures or tables. The system PDF should not be sent as an assignment file, as the NIHMS builds its own PDF.

Sample page; Descriptions are all unique for 'Figure' items:

Edit Submission

- Enter Metadata
- Add/Edit/Remove Authors
- Attach Files

[Insert Special Character](#)

Please Attach Files

Required **Items** are marked with a *. When all **Items** have been attached, click **Next** at the bottom of the page.

Item Figure ▼

Enter a Description. Select Online Web System or Offline delivery. If Online Web System is selected, click the Browse button to select a file, then click the Attach This File button. If Offline is selected, click the AttachThis Information button.

Description:

Delivery Method: Online Web System Offline

File Name:

You can change the order in which files are listed by clicking the 'Update File Order' button

Change Item Type of all Choose files to: Choose
[Check All](#) [Clear All](#)

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	Figure ▼	Figure 1	Jennifer and Holden.jpg	66.4 KB	Feb 7 2011 1:31:42:143PM	Download	<input type="checkbox"/>
2	Figure ▼	Figure 2	shower1.jpg	3.1 KB	Feb 7 2011 1:31:53:283PM	Download	<input type="checkbox"/>
3	Manuscript ▼	Manuscript	Papillary.doc	36 KB	May 23 2001 7:51:08:000AM	Download	<input type="checkbox"/>

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

When a Production has been initiated on a submission, and the submission is available via the Production Tasks Menu, the configured Submission Production Task can be assigned by a user (with proper permission) via the Assign Production Task Action Link,

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Production Started	Copyedit	Transmit to PubMed
Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory AuthorMapper (with first initial at end) Author Mapper (LASTNAME) End Production Send E-mail	DEMO-D-03-00056		Anthony Author (UNITED STATES)	This is an article for submission		04/29/2008	Must Start: Undefined	
Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory AuthorMapper (with first initial at end) Author Mapper (LASTNAME) End Production Send E-mail	DEMO-D-03-00076R1	10.1232	Mr. Kevin M. Carlson (UNITED STATES)	breast cancer research	Ready for Page Layout	03/11/2008	Submitted 10/17/2011 Suzie Chapstick	
Production Details History Transmittal Form Assign Production Task								Cancelled 10/17/2011

Filter By: Spring 2011 [Grand Totals](#) [Download Data](#) [Switch to Traditional View](#) Display 10 results per page. [Grid Options](#)

Return To: [Submission Tasks Reminder Report](#) | [Schedule Group Tasks Reminder Report](#) | [Production Tasks Menu](#) | [Editorial Menu](#)

Once assigned, the Submission Production Task status can be viewed on the Production Status Grid (if so configured). Because this type of task is usually at the end of the Production process, this will typically be configured as a Milestone Task.

Production Status Grid

Filter By: Spring 2011 [Grand Totals](#) [Download Data](#) [Switch to Traditional View](#) Display 10 results per page. [Grid Options](#)

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Production Started	Copyedit	Transmit to PubMed
Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory AuthorMapper (with first initial at end) Author Mapper (LASTNAME) End Production Send E-mail	DEMO-D-03-00056		Anthony Author (UNITED STATES)	This is an article for submission		04/29/2008	Must Start: Undefined	
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Production Details History Transmittal Form Assign Production Task								Cancelled 10/17/2011

Submissions 1 to 7 of 7

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After the Task has been assigned and the selected files have been transmitted, publications may go to the NIHMS Web Interface and review the files:

1. Login to the NIHMS web interface (<http://web.nihms.nih.gov/db/sub.cgi>)
2. Click the 'publisher' login route from the login route table.

NIH Public Access EnglishCA SpanishCA FrenchCA

NIH Manuscript Submission System

Login Options

The NIH Manuscript Submission allows you to submit an electronic version of your peer-reviewed final manuscript for inclusion in [PubMed Central](#). Eligible manuscripts must have been funded by one of the participating groups listed in the table below.

Choose a login route:

Route	Users	Policy
IRA Commons	NIH extramural principal investigators, grantees or applicants	?
NIH	NIH intramural scientists	?
publisher	publishers	?
HHMI	Howard Hughes Medical Institute investigators	?
myNCBI	others	?

[?](#) You should use the same login for all subsequent visits.

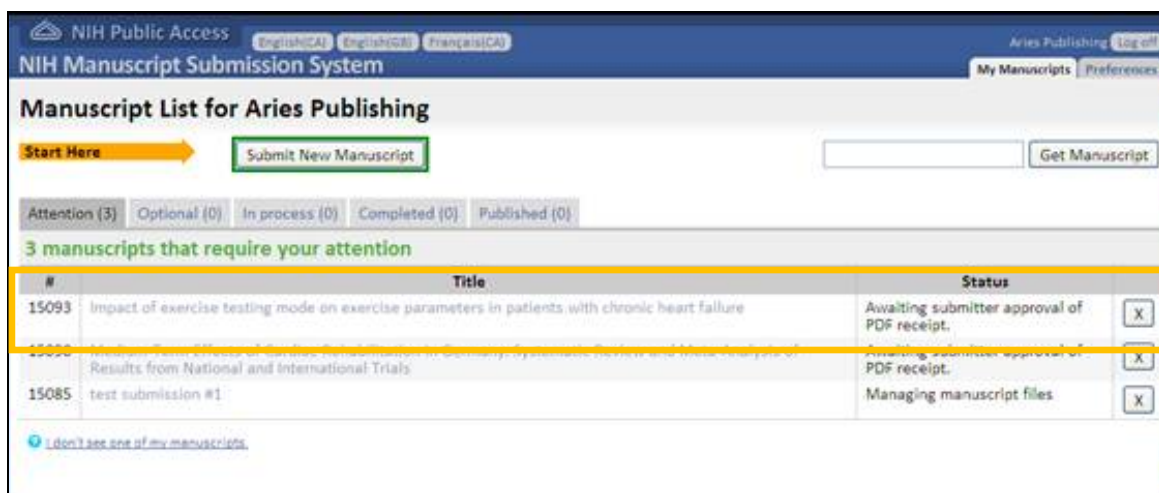
NIHMS does not maintain these login routes. If you experience problems with your login, please contact the institution that is responsible for the account. If you do not have an account, please click on the proper login route to create one (except NIH and Publisher login routes). myNCBI allows users to create new accounts.

For more information on how to use this system to submit your manuscript see [User's Guide](#).

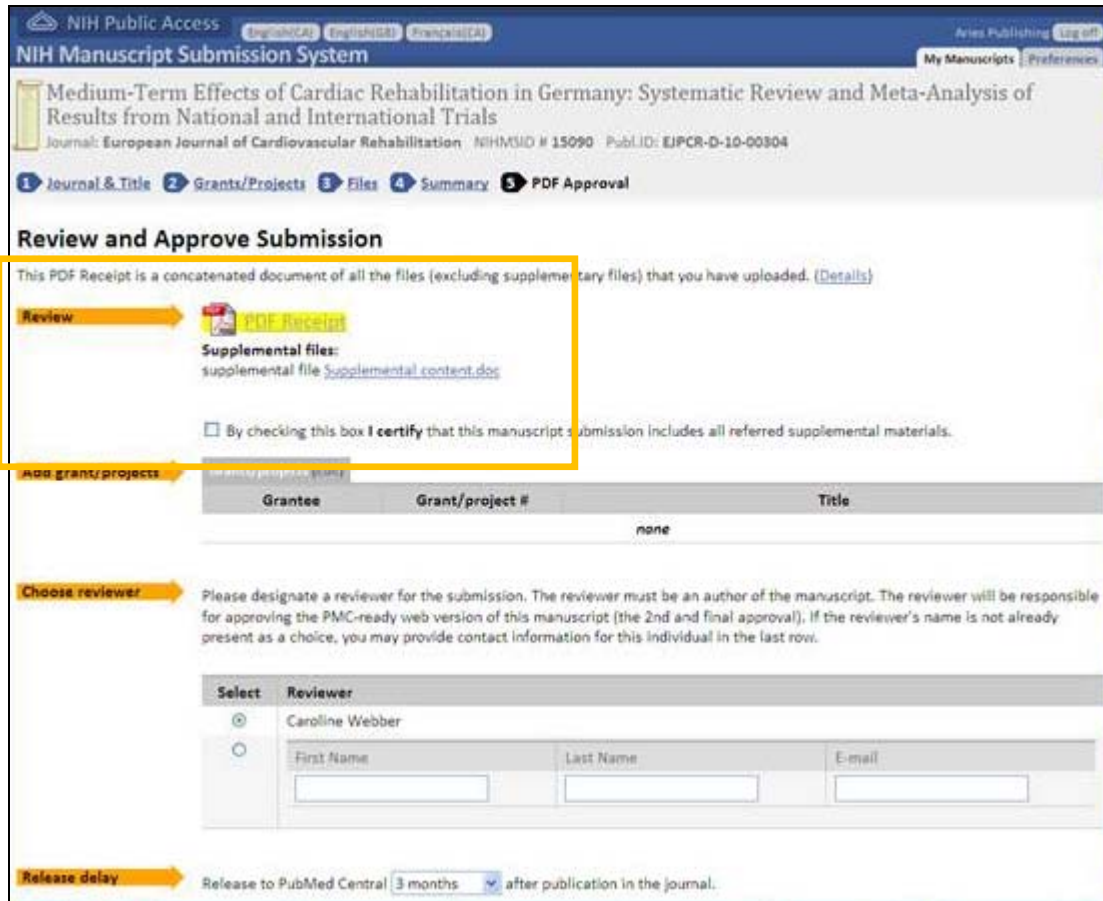
Enter the username and password for your established account, and click the 'Login' button:



You will be automatically directed to the NIHMS interface. The FTP'd submission should be listed, and will initially have the status “Awaiting submitter approval of PDF receipt”.
 NOTE: It may take up to an hour from FTP for the file to go into this status.

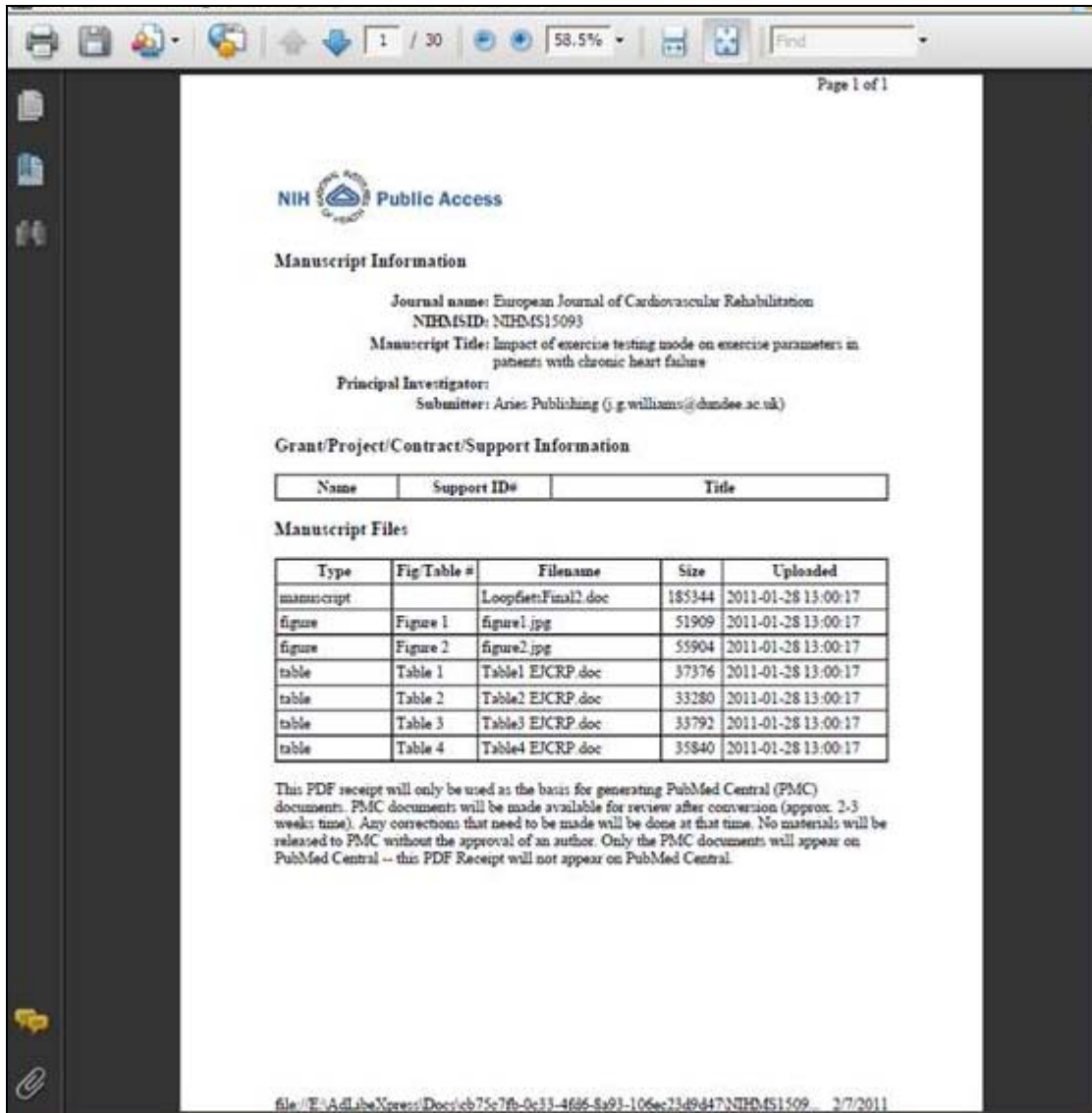


Clicking the article title in this interface allows you to review the NIHMS PDF (listed as “PDF Receipt”).
 NOTE: This is not the EM/PM PDF.



1. Click on the “PDF Receipt” link.
2. Ensure that all manuscript, figure and table files that were ftp’ed have been built into the PDF.
3. Ensure that any supplemental files are listed on the last page of the PDF, and on the web page as “Supplemental Files”.

After clicking the ‘PDF Receipt’ link a listing of the transmitted files is displayed:



TO CONFIGURE:

In PolicyManager, go to ‘Configure Submission Production Tasks’ to edit an existing task to use this FTP method, or create a new task. In the ‘FTP Options’ section of the page, select “NIHMS-PubMed Central Deposit” from the Submission Production Task Transmittal Method drop-down.

NOTE: When using this method, do not select the checkbox “Allow task assignment and FTP without Assignment Files”.

Edit Submission Production Task

[Insert Special Character](#)

New Production Task Name:

Maximum Production Task Name is 100 characters

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

[MIDDLE OF PAGE NOT DISPLAYED]

FTP Options

Submission Production Task Transmittal Method:

Allow task assignment and FTP without Assignment Files

FTP Server address (e.g. ftp.ariessys.com):

Username:

Password:

Subdirectory:

E-mail Address (for transmittal notification):

Submission Production Task Import Profile:

E-mail Address (for import notification):

XML file is required

Fill in the rest of the information as appropriate.

NOTE: Subdirectory is required when using the NIHMS-PubMed Central Deposit method, and must be set to “upload”.

In PolicyManager, go to Transmittal Policies, Add/Edit General Metadata fields, and configure a new field with the description “NLM TA”. Select a Field Type of “Text” and select the “Single Value” radio button in the “Default Value for Field” area. Set the default value to the NLM TA code for your publication (this code is available by contacting the NIHMS). This is required in order to deposit manuscripts into the NIHMS.

Add Journal Defined General Metadata Field

Cancel Submit

Field Description: [Insert Special Character](#)
 NLM TA
 Maximum 256 characters

Field Type: Text
 Maximum Field Length: (A value from 1 to 200)

Default Value for Field:
 If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.
 None
 Single Value (enter value below)
[Insert Special Character](#)
 your NLM code here

Options
 Select the 'Hide' checkbox to suppress the field. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

Page	Hide	Editable	Required	Help Text
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Insert Special Character

Cancel Submit