# CONFIDENTIAL AND PROPRIETARY

## Aries Systems Corporation

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

## Release Notification

**Editorial Manager/Preprint Manager**
**9.2 General Release Notification**
**10/11/2012**
**Draft – Subject to Change**

**Document Change Log**

| Date | Version | Change |
| --- | --- | --- |
| 06/27/2012 | Beta Release | Beta version |
| 08/30/2012 | Gamma Release | Incorporated Beta Supplemental Notes |
| 10/11/2012 | General Release | No Changes |

# Editorial Manager/Preprint Manager 9.2 General Release Notification

# GENERAL ENHANCEMENTS

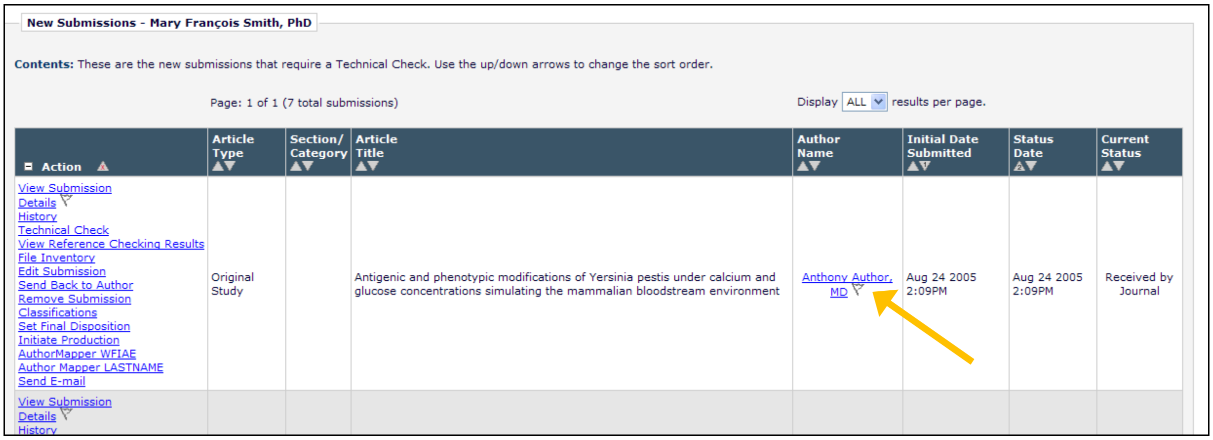
## Custom People Flags

In EM/PM v9.1, Publications may create customized Submission Flags for use in visually identifying various aspects about a submission. New in v9.2, this feature is expanded to allow the use of Custom People Flags. Editor and Publisher Roles may be given permission to turn on, turn off, or view People Flags throughout the system. When turned on for a people record, flags will appear in the following places:

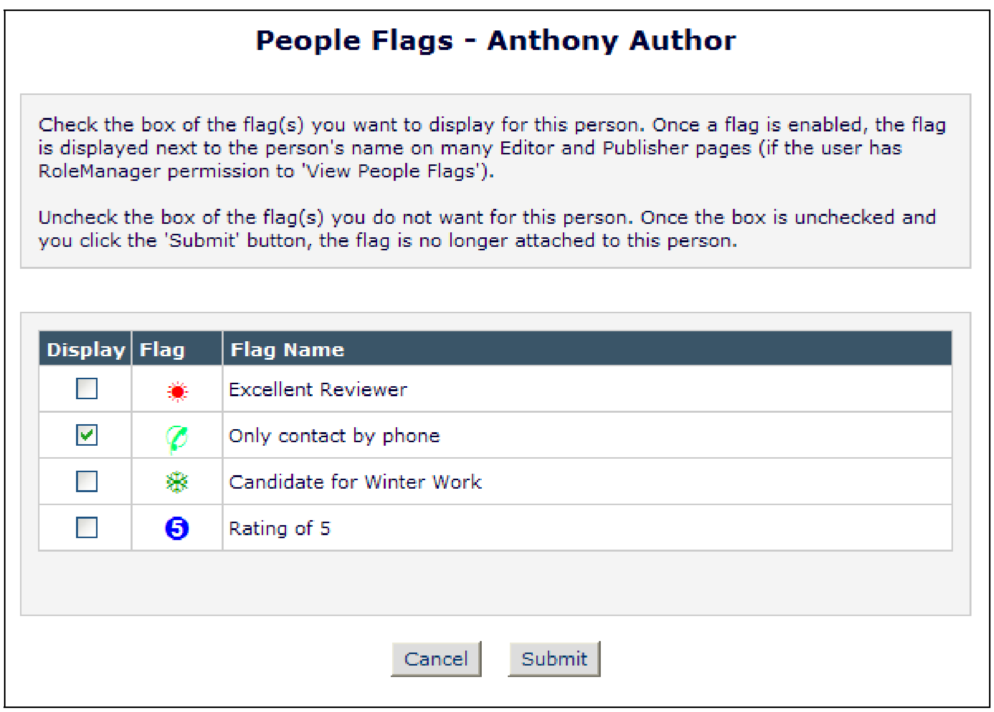
- Search People Results: Next to the Name in the results grid
- Search People – Update Information: Next to the person's name on the left
- People Information: Next to the person's name in the header
- Search Submissions Results: Next to the Author Name, Reviewer Names, Handling Editor Names, and Assigned Editor Names
- Reviewer Selection Summary: Next to Reviewer names displayed on the page
- Search For Reviewers – Result Set: Next to each Reviewer in the results grid
- Search for Authors – Result Set: Next to the Author names displayed in the results grid
- New Submissions: Next to the Author Name
- New Submissions Requiring Assignment: Next to Author Name
- Revised Submissions: Next to the Author Name
- Revised Submissions Requiring Assignment: Next to the Author Name
- New Assignments: Next to the Author Name
- Details: Displays for any Author, Editor, or Reviewer names
- Production Status Grid: Next to the Author Name
- Submissions with Editors Invited – None Yet Assigned: Next to the Author Name
- View All Submissions with Editors Invited – None Yet Assigned: Next to the Author Name
- Editor Selection Summary: Next to Editor Names
- Search Editor Results: Next to Editor Names
- Accepted Submissions: Next to Author Names
- Initiate Discussion / Add Participants: Next to Editor Names
- Discussion: Next to Editor Names
- Submissions with Active Discussions: Next to the Corresponding Author's name and the Discussion Initiator
- Confirm Selection and Customize Letters / Change Reviewer Selections: Next to Reviewer Names (Invited, Assigned, Alternate, Proposed)
- Assign Editor (classic) / Search Editor: Next to Editor Names
- Blinded Editors: Next to Editor Names
- Direct-to-Editor New Submissions: Next to Editor Names
- Direct-to-Editor Revised Submissions: Next to Editor Names
- Author Selection Summary: Next to Author Names
- Search Proposals – Search Results: Next to the Originating Editor and the Handling Editor
- Submissions Needing Approval : Next to the Author Name

- Submissions Sent Back to Author for Approval:  Next to the Author Name
- Incomplete Submissions:  Next to the Author Name
- New Invitations:  Next to Author and Editor Names

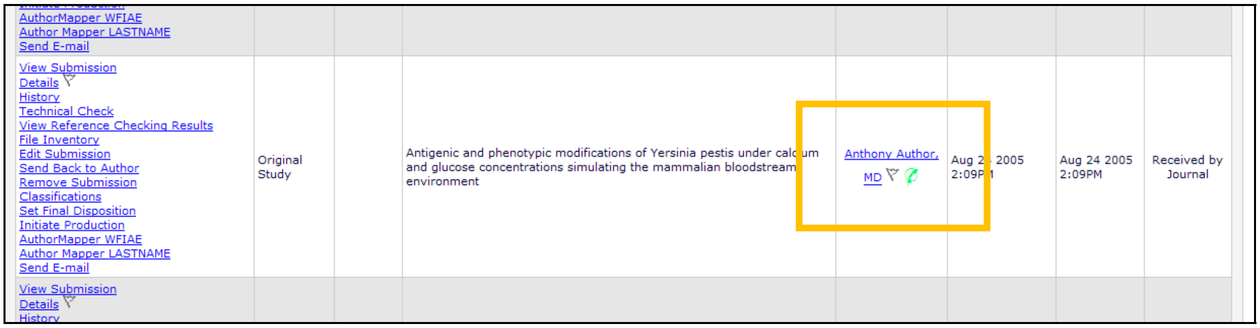
Users with permission to Turn On People Flags will see a Set Flag icon [ ] displayed next to the appropriate names.




Clicking the Set Flag icon will open a new People Flags page displaying all Custom People Flags configured for the publication.  The user may select as many flags as appropriate for the person.

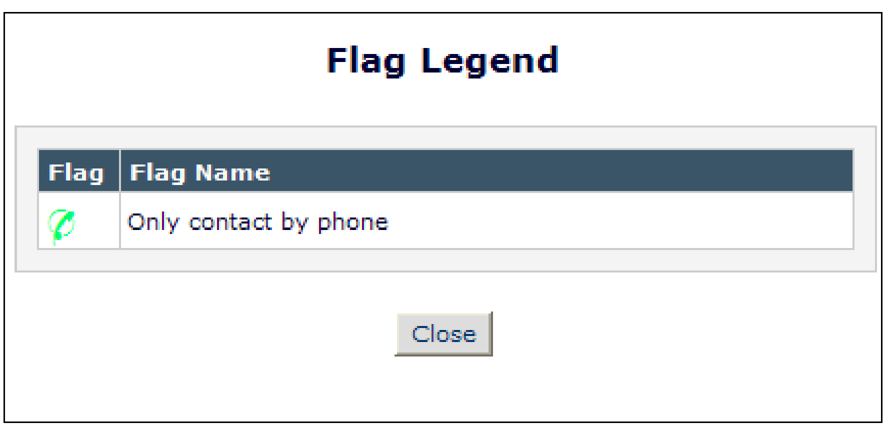



Once selected, the flag will appear next to the person's name in all folders listed above.



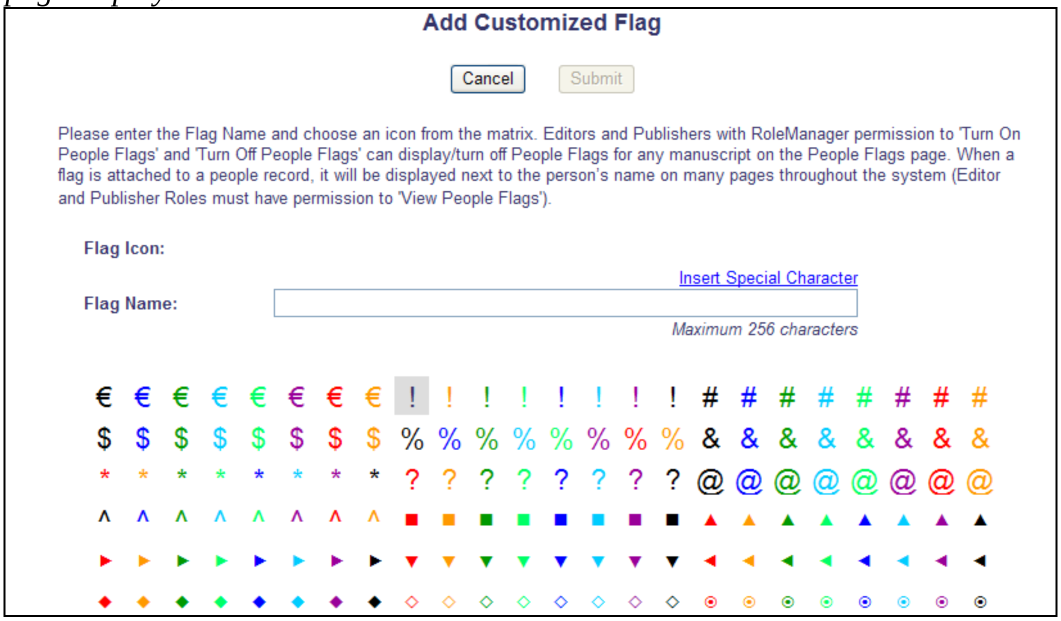

Users with permission to Turn Off People Flags (and not Turn On People Flags) will not see the Set Flag icon, but will see any set Flags displayed next to the appropriate names. Clicking the Flag opens the *People Flags* page where the user may turn off any flags as appropriate.


Users with View People Flags permission only will not see the Set Flag icon, but will see any set Flags displayed next to the appropriate names. Clicking a set Flag opens the *Flag Legend* page.



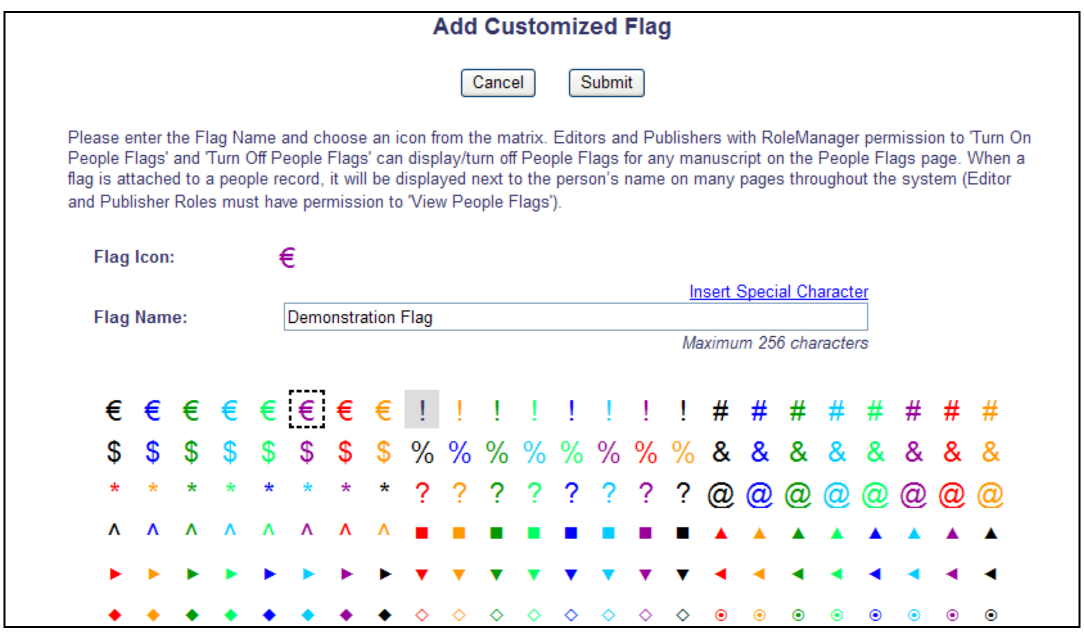
TO CONFIGURE:
To create Custom People Flags for use in your publication, go to PolicyManager, General Policies, Create Customized People Flags. Click the ‘Add’ button to get to the configuration page.

*Partial page display:*



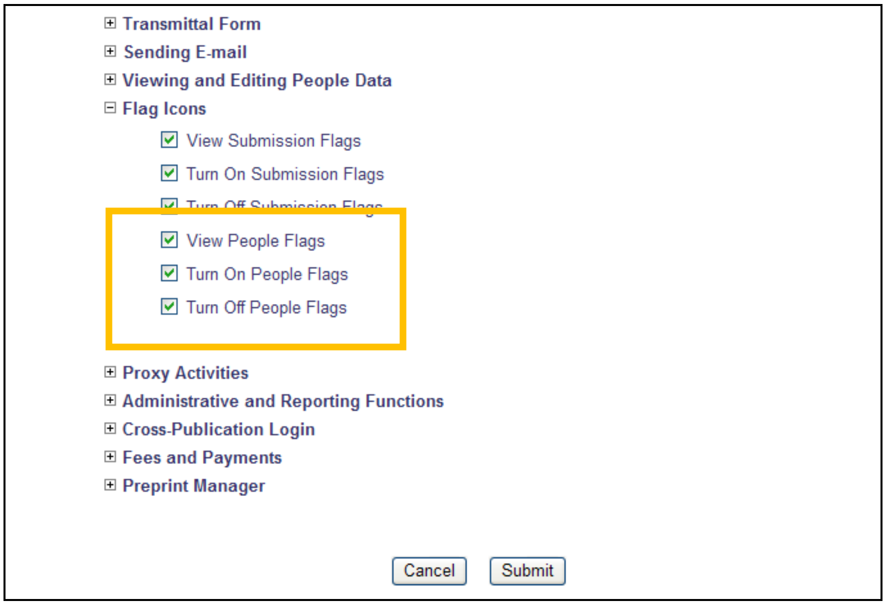

Enter a Flag Name and select an icon from the grid to display.

NOTE: A Flag Icon can only be used as either a Submission Flag OR a People Flag; one icon cannot be used for both Flag types.



Submit the page for the flag to be available for People Flags.

To allow users to View, Turn On, or Turn Off flags, go to RoleManager, select the Editor or Publisher Role to be given these permissions, and select/check the desired permissions in the 'Flag Icons' section.

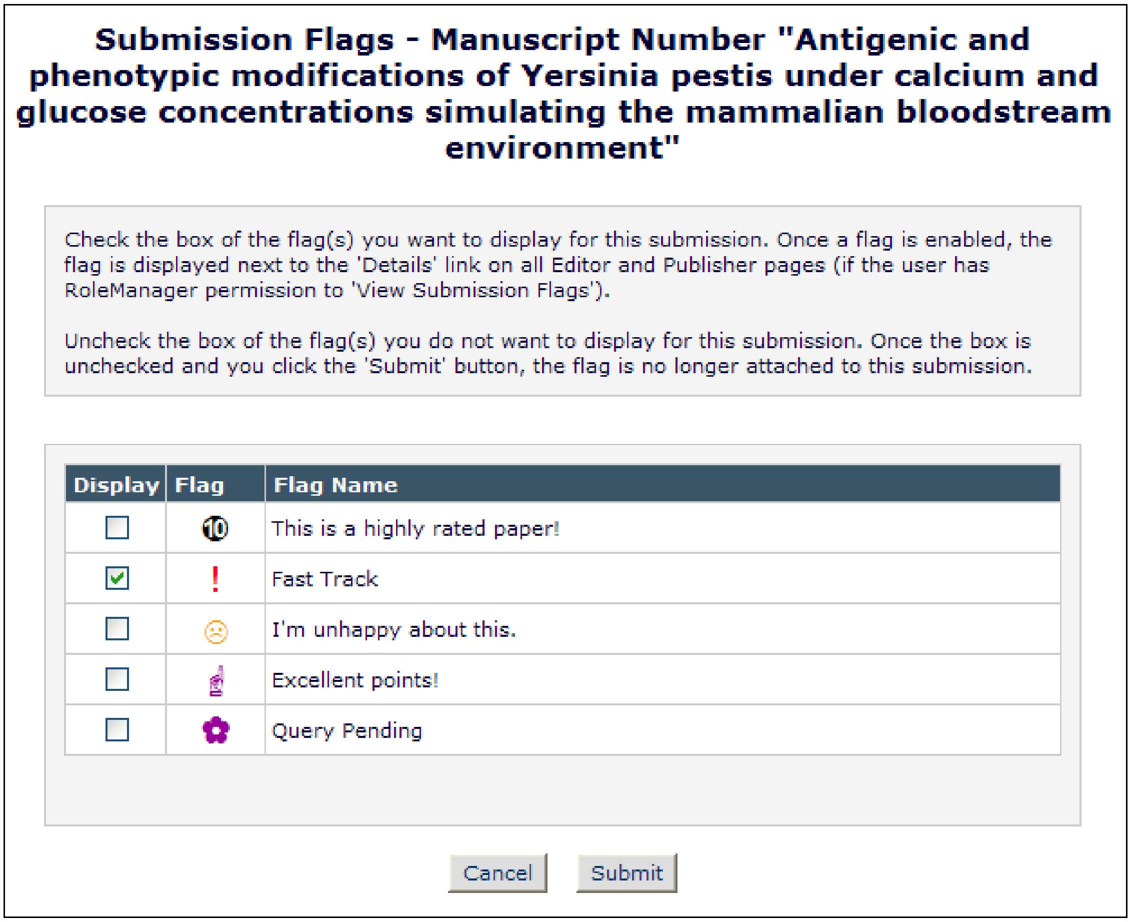


## Enhanced Custom Submission Flags

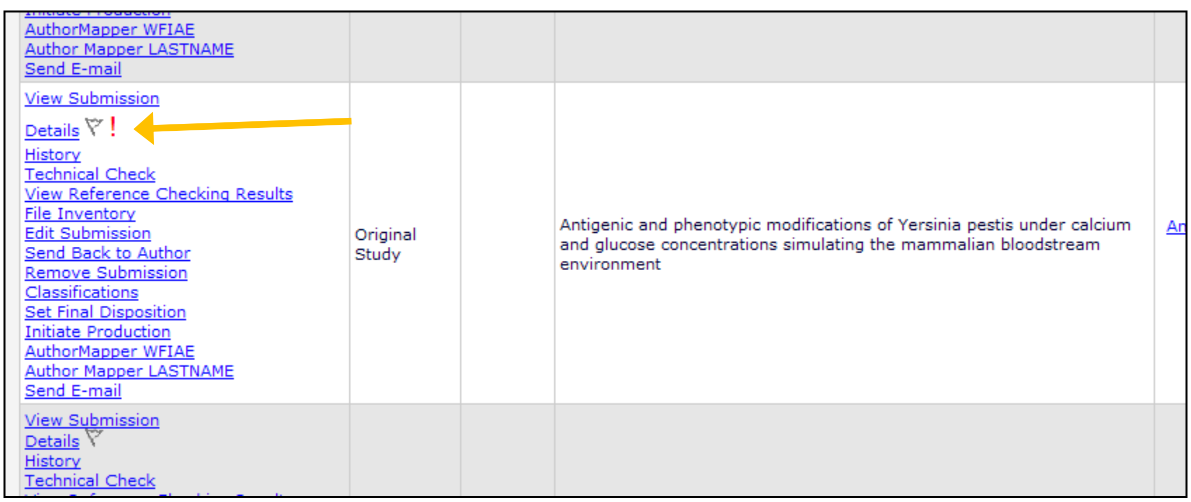
In EM v9.1, publications may configure Custom Submission Flags to be available for use by Editor and Publisher Roles with proper permission.  Users with permission may select which flags to display via a link on the *Details* page.  When a flag is selected to display for a submission, it is visible wherever the *Details* link is available throughout the system.

New in EM v9.2, users may now access the *Submission Flag* page via a flag icon [ ] displayed next to the Details link.

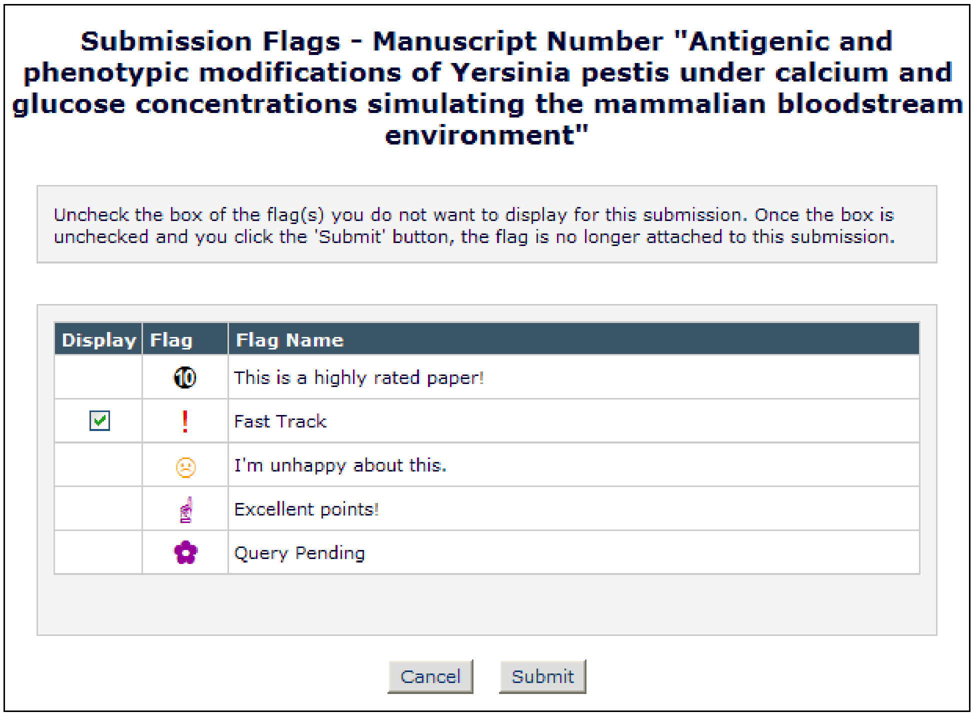

Clicking the Set Flag icon opens the *Submission Flags* pop-up, where the authorized user can select one or more flags to appear for this submission.




Once selected, the flag appears next to the Details link.




Users with permission to Turn Off Submission Flags (and not Turn On Submission Flags) will not see the Set Flag icon, but will see any set Flags displayed next to the Details link. Clicking the Flag opens the *Submission Flags* page where the user may turn off any flags as appropriate.



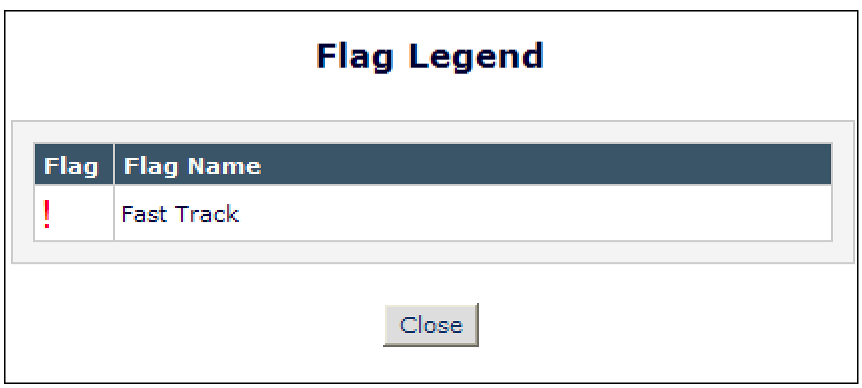
**Submission Flags - Manuscript Number "Antigenic and phenotypic modifications of Yersinia pestis under calcium and glucose concentrations simulating the mammalian bloodstream environment"**

Uncheck the box of the flag(s) you do not want to display for this submission. Once the box is unchecked and you click the 'Submit' button, the flag is no longer attached to this submission.

| Display | Flag | Flag Name |
| --- | --- | --- |
| | | This is a highly rated paper! |
| ☑ | ! | Fast Track |
| | | I'm unhappy about this. |
| | | Excellent points! |
| | | Query Pending |

Cancel Submit

Users with View Submission Flags permission only will not see the Set Flag icon, but will see any set Flags displayed next to the Details link. Clicking a set Flag opens the *Flag Legend* page.



**Flag Legend**

| Flag | Flag Name |
| --- | --- |
| ! | Fast Track |

Close

TO CONFIGURE:
No additional configuration is required to set Submission Flags directly from folders throughout the system. Editor and Publisher Roles with ‘Turn On Submission Flags’ and/or ‘Turn Off Submission Flags’ permission enabled will see the new Flag icon next to the Details link where the link displays. Editor and Publisher Roles with ‘View Submission Flags’ permission enabled will continue to see the flags display as before.

To configure Custom Submission Flags, go to PolicyManager, General Policies, click the Create Customized Submission Flags link, and ‘Add’ a new flag.

NOTE: A Flag Icon can only be used as either a Submission Flag OR a People Flag; one icon cannot be used for both Flag types.

## Enhanced Custom Flag Palette

A number of additional Flags have been added to EM/PM v9.2 for use in Custom People and Custom Submission Flags.  These new flags include the following (one of each in the existing set of color options):

- Capital Letters
- Lower Case Letters
- Numbers 0 – 10
- Symbols such as major currency symbols (Euro, Dollar), percent signs, etc.

[Flag palette displayed on next page]

| | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| € | € | € | € | € | € | € | € | ! | ! | ! | ! | ! | ! | ! | ! | # | # | # | # | # | # | # | # |
| $ | $ | $ | $ | $ | $ | $ | $ | % | % | % | % | % | % | % | % | & | & | & | & | & | & | & | & |
| * | * | * | * | * | * | * | * | ? | ? | ? | ? | ? | ? | ? | ? | @ | @ | @ | @ | @ | @ | @ | @ |
| ^ | ^ | ^ | ^ | ^ | ^ | ^ | ^ | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ | ▲ |
| ► | ► | ► | ► | ► | ► | ► | ► | ▼ | ▼ | ▼ | ▼ | ▼ | ▼ | ▼ | ▼ | ◄ | ◄ | ◄ | ◄ | ◄ | ◄ | ◄ | ◄ |
| ◆ | ◆ | ◆ | ◆ | ◆ | ◆ | ◆ | ◆ | ◇ | ◇ | ◇ | ◇ | ◇ | ◇ | ◇ | ◇ | ⊙ | ⊙ | ⊙ | ⊙ | ⊙ | ⊙ | ⊙ | ⊙ |
| ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ☝ | ☝ | ☝ | ☝ | ☝ | ☝ | ☝ | ☝ | ☞ | ☞ | ☞ | ☞ | ☞ | ☞ | ☞ | ☞ |
| ☟ | ☟ | ☟ | ☟ | ☟ | ☟ | ☟ | ☟ | ☜ | ☜ | ☜ | ☜ | ☜ | ☜ | ☜ | ☜ | £ | £ | £ | £ | £ | £ | £ | £ |
| ¥ | ¥ | ¥ | ¥ | ¥ | ¥ | ¥ | ¥ | ✹ | ✹ | ✹ | ✹ | ✹ | ✹ | ✹ | ✹ | ☎ | ☎ | ☎ | ☎ | ☎ | ☎ | ☎ | ☎ |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ | ☒ | ☒ | ☒ | ☒ | ☒ | ☒ | ☒ | ☒ |
| ☢ | ☢ | ☢ | ☢ | ☢ | ☢ | ☢ | ☢ | ☹ | ☹ | ☹ | ☹ | ☹ | ☹ | ☹ | ☹ | ☺ | ☺ | ☺ | ☺ | ☺ | ☺ | ☺ | ☺ |
| ♛ | ♛ | ♛ | ♛ | ♛ | ♛ | ♛ | ♛ | ♣ | ♣ | ♣ | ♣ | ♣ | ♣ | ♣ | ♣ | ✂ | ✂ | ✂ | ✂ | ✂ | ✂ | ✂ | ✂ |
| ✒ | ✒ | ✒ | ✒ | ✒ | ✒ | ✒ | ✒ | ✈ | ✈ | ✈ | ✈ | ✈ | ✈ | ✈ | ✈ | ✉ | ✉ | ✉ | ✉ | ✉ | ✉ | ✉ | ✉ |
| ✍ | ✍ | ✍ | ✍ | ✍ | ✍ | ✍ | ✍ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✖ | ✖ | ✖ | ✖ | ✖ | ✖ | ✖ | ✖ |
| ✚ | ✚ | ✚ | ✚ | ✚ | ✚ | ✚ | ✚ | ☆ | ☆ | ☆ | ☆ | ☆ | ☆ | ☆ | ☆ | ✪ | ✪ | ✪ | ✪ | ✪ | ✪ | ✪ | ✪ |
| ✿ | ✿ | ✿ | ✿ | ✿ | ✿ | ✿ | ✿ | ❄ | ❄ | ❄ | ❄ | ❄ | ❄ | ❄ | ❄ | ♥ | ♥ | ♥ | ♥ | ♥ | ♥ | ♥ | ♥ |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | ❶ | ❶ | ❶ | ❶ | ❶ | ❶ | ❶ | ❶ |
| 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | ❷ | ❷ | ❷ | ❷ | ❷ | ❷ | ❷ | ❷ | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| ❸ | ❸ | ❸ | ❸ | ❸ | ❸ | ❸ | ❸ | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | ❹ | ❹ | ❹ | ❹ | ❹ | ❹ | ❹ | ❹ |
| 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | ❺ | ❺ | ❺ | ❺ | ❺ | ❺ | ❺ | ❺ | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| ❻ | ❻ | ❻ | ❻ | ❻ | ❻ | ❻ | ❻ | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | ❼ | ❼ | ❼ | ❼ | ❼ | ❼ | ❼ | ❼ |
| 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | ❽ | ❽ | ❽ | ❽ | ❽ | ❽ | ❽ | ❽ | 9 | 9 | 9 | 9 | 9 | 9 | 9 | 9 |
| ❾ | ❾ | ❾ | ❾ | ❾ | ❾ | ❾ | ❾ | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | ❿ | ❿ | ❿ | ❿ | ❿ | ❿ | ❿ | ❿ |
| A | a | A | a | A | a | A | a | A | a | A | a | A | a | A | a | B | b | B | b | B | b | B | b |
| B | b | B | b | B | b | B | b | C | c | C | c | C | c | C | c | C | c | C | c | C | c | C | c |
| D | d | D | d | D | d | D | d | D | d | D | d | D | d | D | d | E | e | E | e | E | e | E | e |
| E | e | E | e | E | e | E | e | F | f | F | f | F | f | F | f | F | f | F | f | F | f | F | f |
| G | g | G | g | G | g | G | g | G | g | G | g | G | g | G | g | H | h | H | h | H | h | H | h |
| H | h | H | h | H | h | H | h | I | i | I | i | I | i | I | i | I | i | I | i | I | i | I | i |
| J | j | J | j | J | j | J | j | J | j | J | j | J | j | J | j | K | k | K | k | K | k | K | k |
| K | k | K | k | K | k | K | k | L | l | L | l | L | l | L | l | L | l | L | l | L | l | L | l |
| M | m | M | m | M | m | M | m | M | m | M | m | M | m | M | m | N | n | N | n | N | n | N | n |
| N | n | N | n | N | n | N | n | O | o | O | o | O | o | O | o | O | o | O | o | O | o | O | o |
| P | p | P | p | P | p | P | p | P | p | P | p | P | p | P | p | Q | q | Q | q | Q | q | Q | q |
| Q | q | Q | q | Q | q | Q | q | R | r | R | r | R | r | R | r | R | r | R | r | R | r | R | r |
| S | s | S | s | S | s | S | s | S | s | S | s | S | s | S | s | T | t | T | t | T | t | T | t |
| T | t | T | t | T | t | T | t | U | u | U | u | U | u | U | u | U | u | U | u | U | u | U | u |
| V | v | V | v | V | v | V | v | V | v | V | v | V | v | V | v | W | w | W | w | W | w | W | w |
| W | w | W | w | W | w | W | w | X | x | X | x | X | x | X | x | X | x | X | x | X | x | X | x |
| Y | y | Y | y | Y | y | Y | y | Y | y | Y | y | Y | y | Y | y | | | | | | | | |

TO CONFIGURE:
No additional configuration is required.  These new Flags are available in the Flag Grid upon upgrade to v9.2.

## Personal Identifiers

One challenge encountered in scholarly publishing is that of unambiguously identifying the author of a paper (or, conversely, identifying all papers published by a specific person): Personal names may be cited in different formats or languages, or may change (for example, on marriage), multiple authors in the same field may have the same name, and other metadata such as affiliation tends to change over time. There are several industry initiatives that provide unique identifiers to individuals who register with an approved agency. Once an author has registered and obtained such an identifier, it can be associated with material written by that person and used to unambiguously identify the works they have authored.

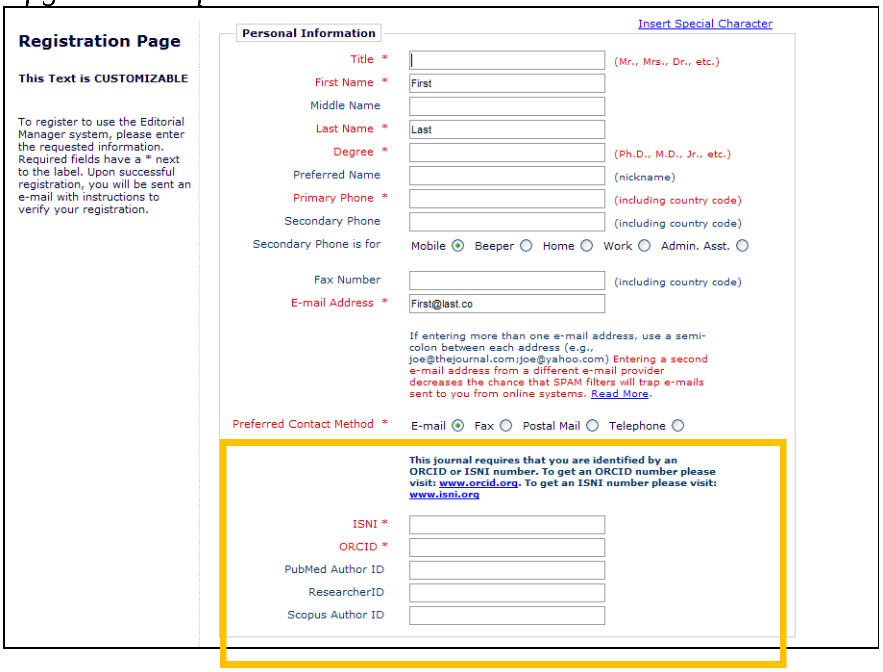
New in EM/PM v9.2, five (5) new Personal Identifier fields are available for data entry and/or display on the registration and update people information pages, and the expedited reviewer login page:

- **ISNI -** International Standard Name Identifier. ISO standard for 'Public Identities' used in media industries. http://www.isni.org/
- **ORCID -** Created by a not-for profit association of publishers and academic organizations to act as an identifier for academic publishing. http://orcid.org/
- **PubMed Author ID -** NLM initiative to develop an identifier for NLM use, to be interoperable with other identifiers. http://www.nlm.nih.gov/pubs/techbull/nd10/nd10_pm_author_id.html
- **ResearcherID -** Integrates with Web of Science bibliographic database. http://isiwebofknowledge.com/researcherid/
- **Scopus Author ID -** Integrates with Scopus bibliographic database. http://www.info.sciverse.com/scopus/scopus-in-detail/tools/authoridentifier

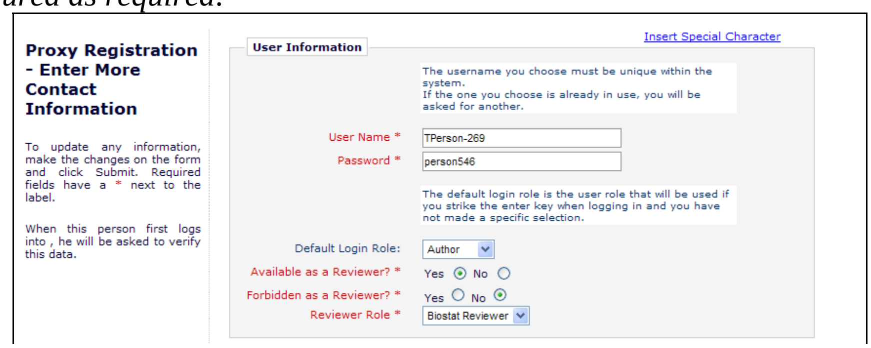
Publications may configure as few, or as many of these identifiers to display as they wish. When enabled, these fields display at the bottom of the 'Personal Information' section of the *Registration* and *Update My Information* pages. Publications may configure custom instructions to display to users above these fields if they choose. Information on the Personal Identifiers, such as where Authors may register for the desired identifiers, can be included in these custom instructions.

Each individual identifier field may be set to be optional or required, or hidden altogether. When required, the field labels display in red text with an asterisk (*) to denote that they are required fields.

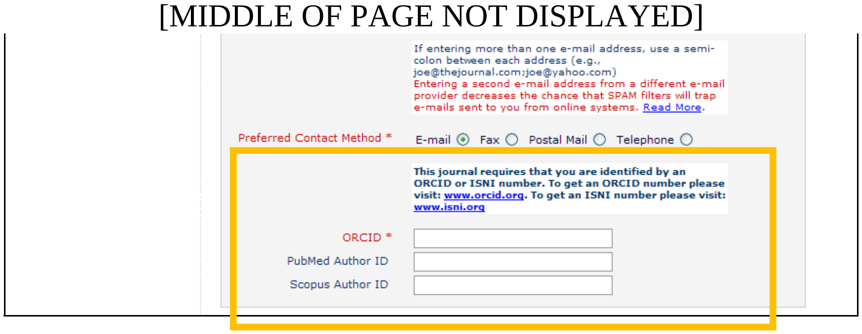
*Sample* Registration *Page, partial page, all five identifiers configured to display, with only ISNI and ORCID configured as required:*




*Sample* Proxy Registration – Enter More Contact Information *Page; three identifiers shown, only ORCID configured as required:*

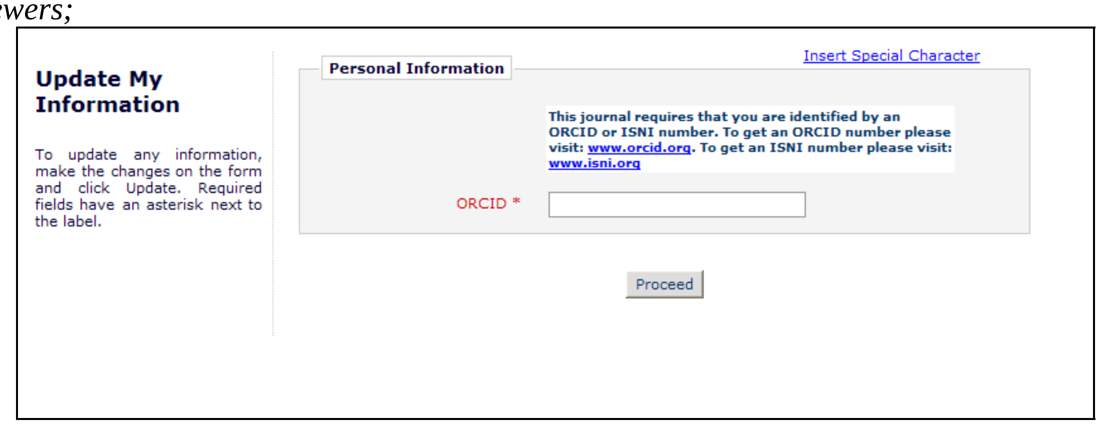



[MIDDLE OF PAGE NOT DISPLAYED]



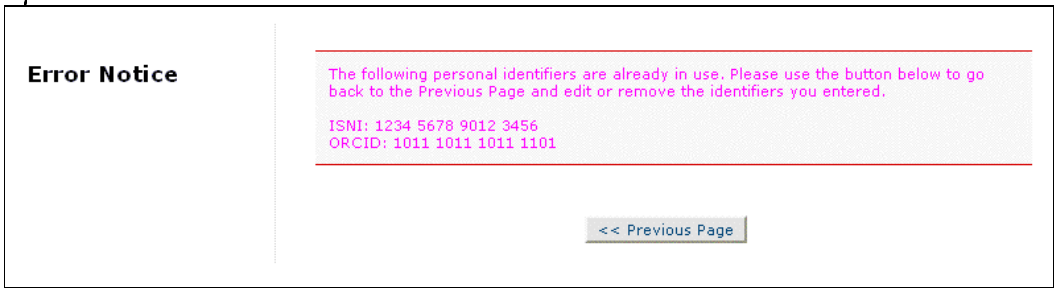
*Sample* Update My Information *page; partial page:*


*Sample* Expedited Reviewer Login *page; ORCID identifier has been marked as Required for Reviewers;*



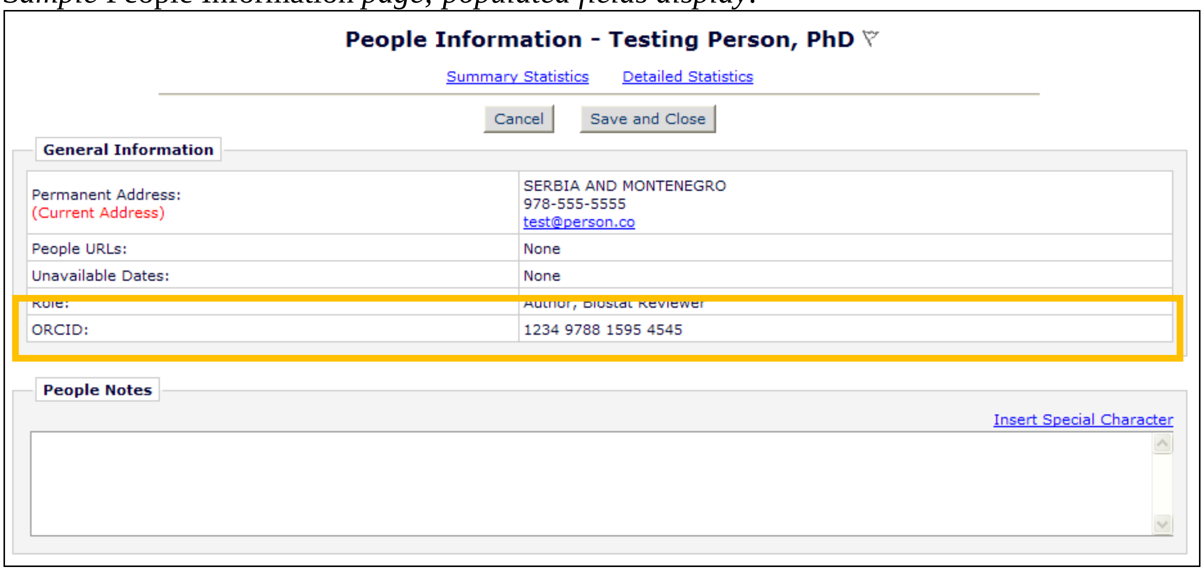

When a Personal Identifier is entered in a configured field, the system checks against existing IDs in people records to ensure a duplicate is not entered. In the event a duplicate is detected, the user will see a warning upon submitting the page and will need to change this information.

*Sample of error:*




When a field has been populated, then that field displays as a label on the *People Information (Activity Details)* page. This page does not displays all configured identifiers, but only identifiers which have been entered for the displayed People Record. If the People Record has no identifier data, no identifier fields are displayed.

*Sample* People Information *page; populated fields display:*

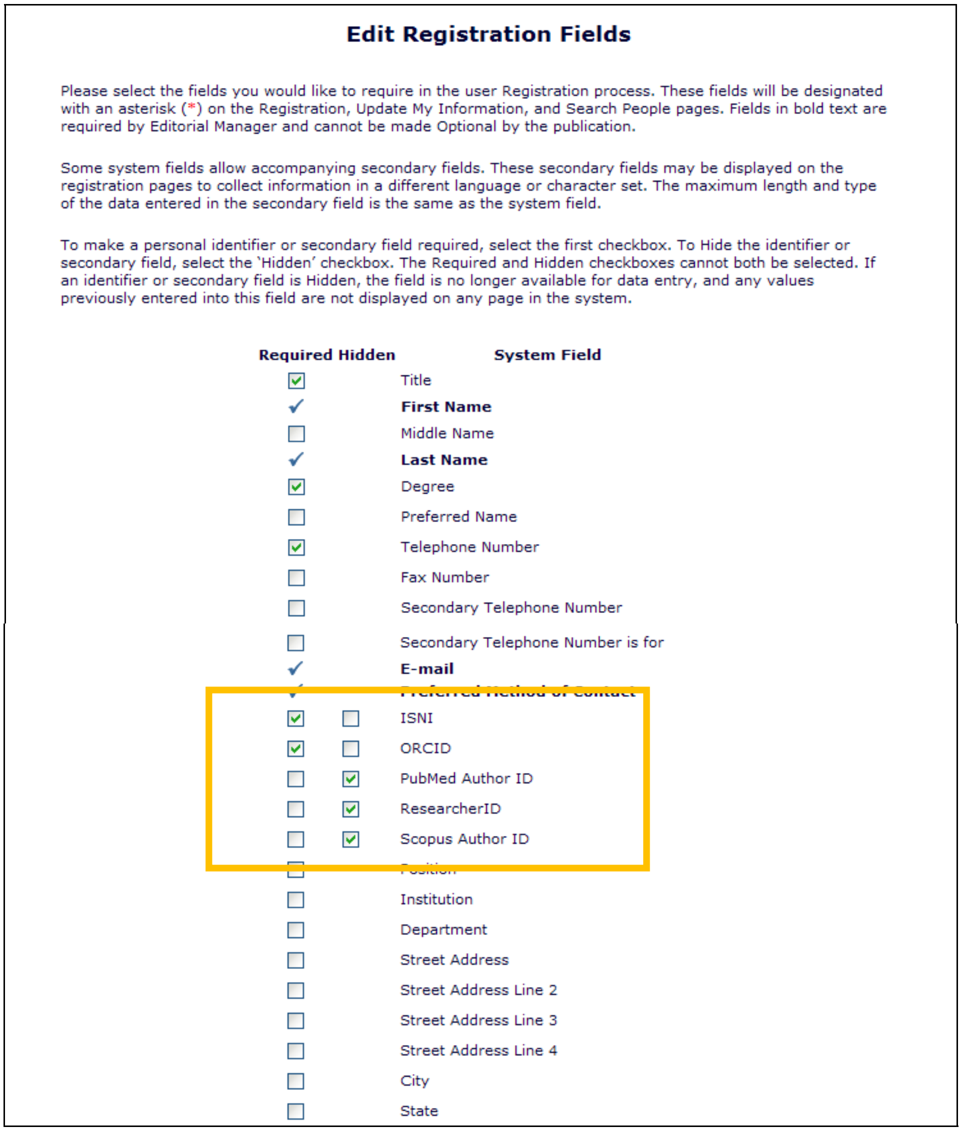



For publications in a People Sharing Group, the Personal Identifier information is synced between publications, unless a publication has the "Do not allow this user's contact information to be overwritten during synchronization with other publications in the group" option selected for a user's record.

These new fields are also available in the following Views for use in creating Custom Reports:

- Authors and Submissions View
- Editors and Submissions View
- People and Address View
- People and Classifications View
- People and Keywords View
- Reviewers and Submissions View
- Submission Production Tasks View (Production Tracking users only)

TO CONFIGURE FOR REGISTRATION:
To display the new Personal Identifier fields for users on Registration and the ‘Update my Information’ page, go to PolicyManager, Registration and Login Policies, Edit Registration Fields, and select which of the 5 new fields to display by unchecking/deselecting the checkbox in the ‘Hidden’ column (these new fields are set to be ‘Hidden’ on upgrade to v9.2). To require any fields, select/check the corresponding box under the ‘Required’ column.

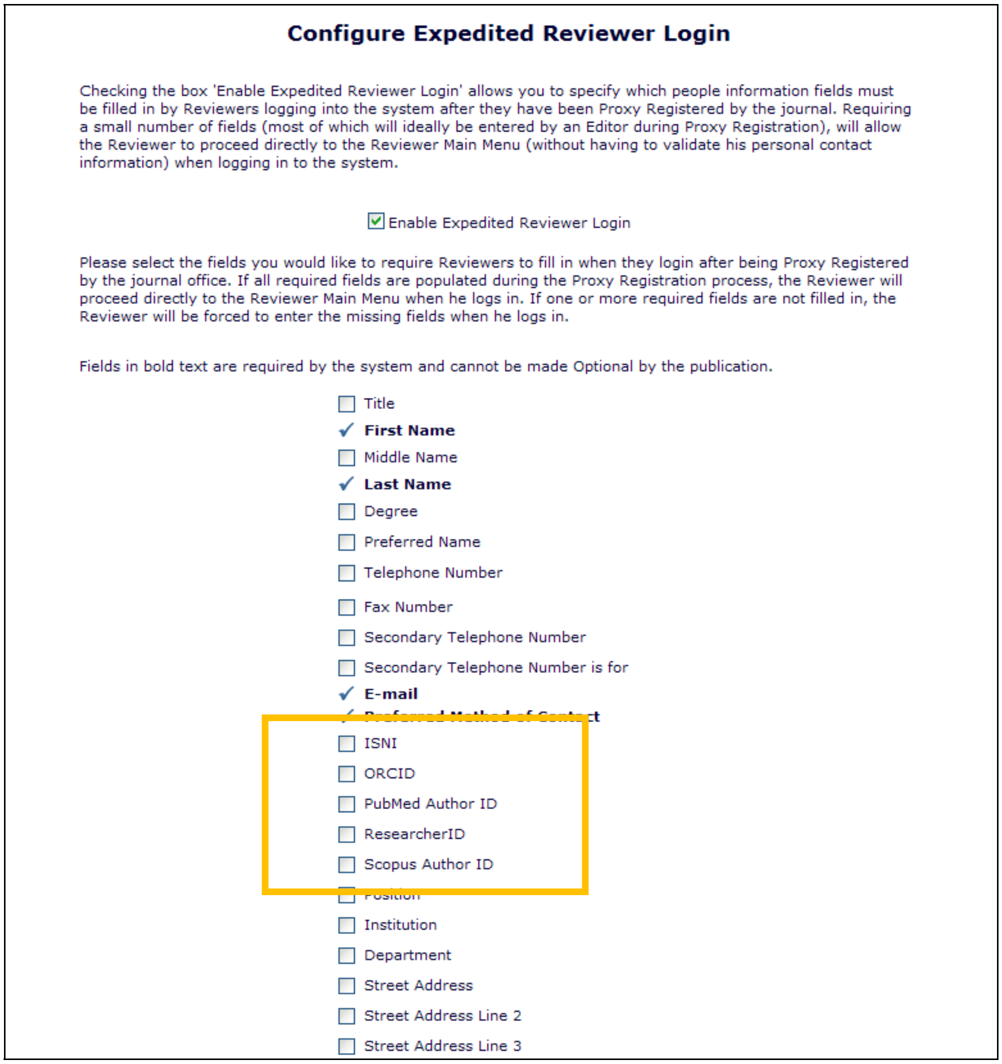



[REST OF THE PAGE UNCHANGED]

NOTE: Publications may wish to make identifiers ‘Optional’ (not required) on registration, unless it is a condition of publication that the Author have an identifier with a preferred bibliographic search database.

TO CONFIGURE FOR EXPEDITED REVIEWER LOGIN:
To enable these fields for the Expedited Reviewer Login process, in PolicyManager, Registration and Login Policies, click the Configure Expedited Reviewer Login link. Selecting any of the 5

new fields on this page will require that Reviewers enter this data upon logging into EM if the information was not provided by the Editor who originally created the record. These fields are not selected by default on upgrade to v9.2.



**Configure Expedited Reviewer Login**

Checking the box 'Enable Expedited Reviewer Login' allows you to specify which people information fields must be filled in by Reviewers logging into the system after they have been Proxy Registered by the journal. Requiring a small number of fields (most of which will ideally be entered by an Editor during Proxy Registration), will allow the Reviewer to proceed directly to the Reviewer Main Menu (without having to validate his personal contact information) when logging in to the system.

☑ Enable Expedited Reviewer Login

Please select the fields you would like to require Reviewers to fill in when they login after being Proxy Registered by the journal office. If all required fields are populated during the Proxy Registration process, the Reviewer will proceed directly to the Reviewer Main Menu when he logs in. If one or more required fields are not filled in, the Reviewer will be forced to enter the missing fields when he logs in.

Fields in bold text are required by the system and cannot be made Optional by the publication.

- ☐ Title
- ✓ **First Name**
- ☐ Middle Name
- ✓ **Last Name**
- ☐ Degree
- ☐ Preferred Name
- ☐ Telephone Number
- ☐ Fax Number
- ☐ Secondary Telephone Number
- ☐ Secondary Telephone Number is for
- ✓ **E-mail**
- ✓ **Preferred Method of Contact**
- ☐ ISNI
- ☐ ORCID
- ☐ PubMed Author ID
- ☐ ResearcherID
- ☐ Scopus Author ID
- ☐ Position
- ☐ Institution
- ☐ Department
- ☐ Street Address
- ☐ Street Address Line 2
- ☐ Street Address Line 3

[REST OF THE PAGE UNCHANGED]

To configure additional instructions to display above the Personal Identifiers when they are displayed, go to PolicyManager, Registration and Login Policies, Edit Registration Instructions, and find the new 'Personal Identifier Instructions' section. There are no default instructions; publications may enter instructions to display. Leaving this blank will suppress the instructions from the Registration page and other pages where people metadata may be edited.


[REST OF THE PAGE UNCHANGED]

## Request Personal Identifiers on Add/Edit Authors Step

Publications may wish to collect personal identifier information for authors who contributed to a submission. New in EM/PM v9.2, Personal Identifiers may be added to the 'Add/Edit Authors' step of the submission process, enabling Corresponding Authors to provide these identifiers for Co-Authors.

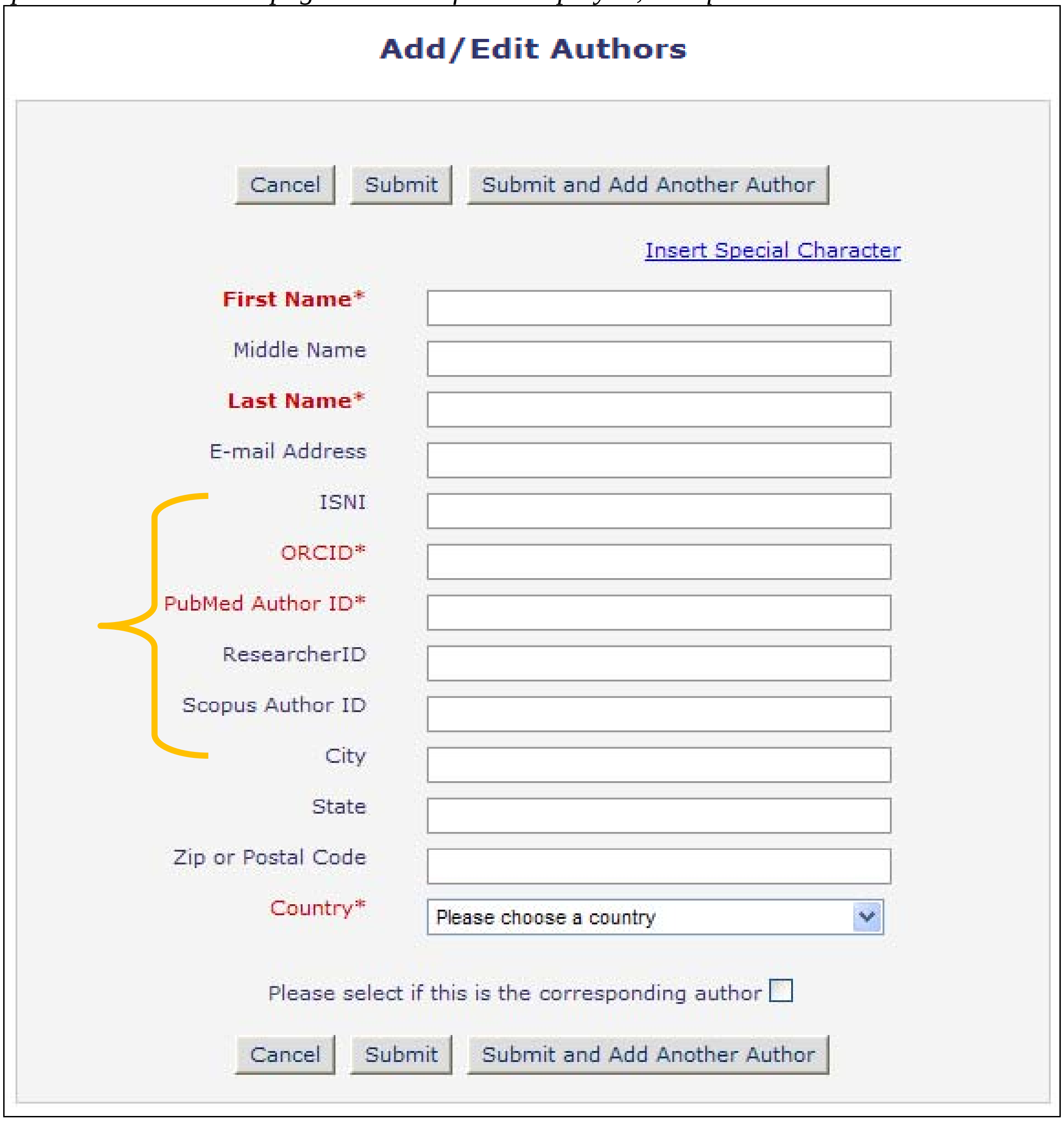
Five new fields are available for use on the Add/Edit/Remove Authors step for New Submission, Revised Submission, or Edit Submission. The fields are:

- **ISNI -** International Standard Name Identifier. ISO standard for 'Public Identities' used in media industries. http://www.isni.org/
- **ORCID -** Created by a not-for profit association of publishers and academic organizations to act as an identifier for academic publishing. http://orcid.org/
- **PubMed Author ID -** NLM initiative to develop an identifier for NLM use, to be interoperable with other identifiers. http://www.nlm.nih.gov/pubs/techbull/nd10/nd10_pm_author_id.html
- **ResearcherID -** Integrates with Web of Science bibliographic database. http://isiwebofknowledge.com/researcherid/
- **Scopus Author ID -** Integrates with Scopus bibliographic database. http://www.info.sciverse.com/scopus/scopus-in-detail/tools/authoridentifier

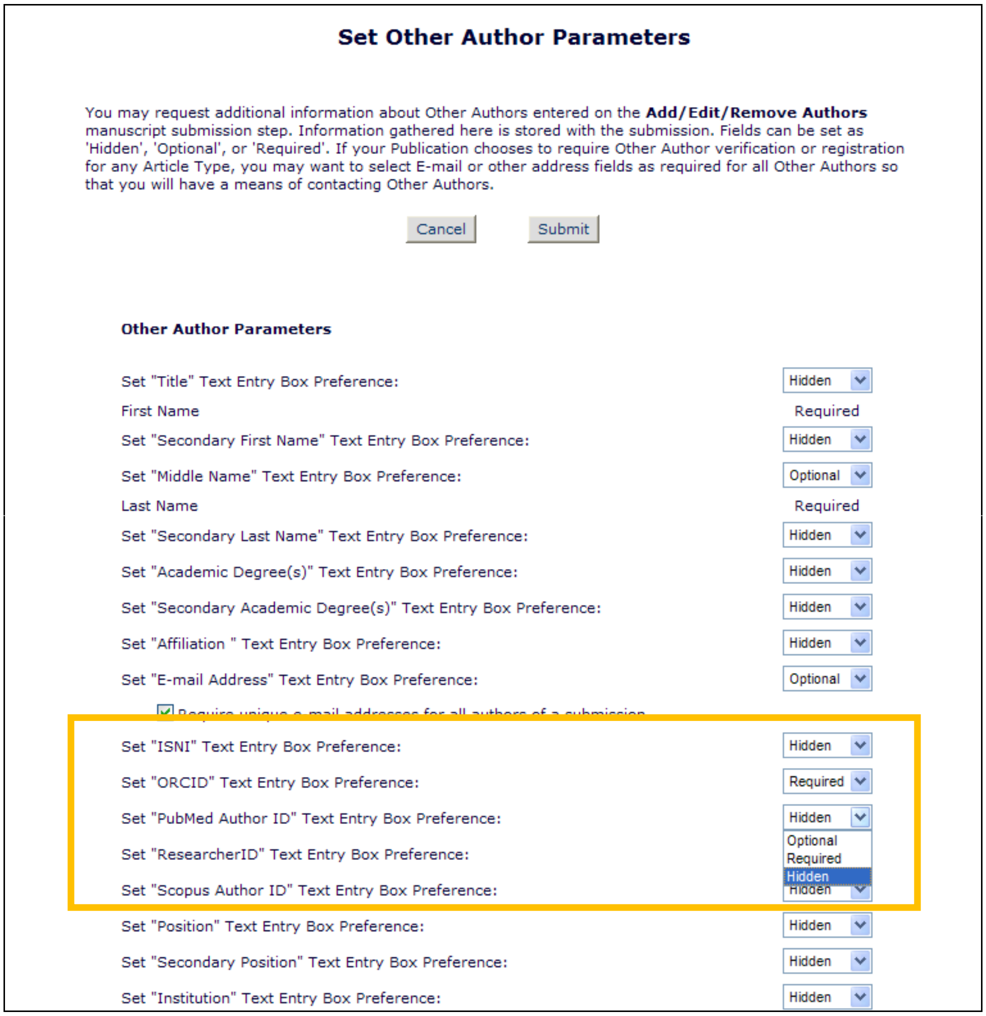
These fields are set to be 'Hidden' on upgrade to v9.2. If configured to display as either 'Optional' or 'Required', they are available for data entry on the Add/Edit Authors pop-up page.

NOTE: Where the publication is also configured to require Co-Authors to validate their co-authorship and register with EM, these Identifiers are copied to the new registrant's record with other people field information.

*Sample* Add/Edit Authors *page with all 5 fields displayed; 2 required:*




TO CONFIGURE:
To display the new Personal Identifier fields for Authors on the Add/Edit Authors step of the submission process, go to PolicyManager, Submission Policies, Set Other Authors Parameters, and configure any of the 5 new fields to be 'Optional' or 'Required' (these new field are set to be 'Hidden' on upgrade to v9.2).


Set Other Author Parameters
You may request additional information about Other Authors entered on the Add/Edit/Remove Authors manuscript submission step. Information gathered here is stored with the submission. Fields can be set as 'Hidden', 'Optional', or 'Required'. If your Publication chooses to require Other Author verification or registration for any Article Type, you may want to select E-mail or other address fields as required for all Other Authors so that you will have a means of contacting Other Authors.
Cancel
Submit
Other Author Parameters
Set "Title" Text Entry Box Preference: Hidden
First Name Required
Set "Secondary First Name" Text Entry Box Preference: Hidden
Set "Middle Name" Text Entry Box Preference: Optional
Last Name Required
Set "Secondary Last Name" Text Entry Box Preference: Hidden
Set "Academic Degree(s)" Text Entry Box Preference: Hidden
Set "Secondary Academic Degree(s)" Text Entry Box Preference: Hidden
Set "Affiliation " Text Entry Box Preference: Hidden
Set "E-mail Address" Text Entry Box Preference: Optional
Set "ISNI" Text Entry Box Preference: Hidden
Set "ORCID" Text Entry Box Preference: Required
Set "PubMed Author ID" Text Entry Box Preference: Hidden
Optional
Required
Hidden
Set "ResearcherID" Text Entry Box Preference:
Set "Scopus Author ID" Text Entry Box Preference:
Set "Position" Text Entry Box Preference: Hidden
Set "Secondary Position" Text Entry Box Preference: Hidden
Set "Institution" Text Entry Box Preference: Hidden

## Unique E-mail Limitations for Co-authors

In EM v9.1, publications may configure certain letters to be CC'd to co-authors of a submission. Publications may also require that co-authors of a submission verify that they are contributors, or register with the publication and verify their contribution to the submission. Corresponding Authors are able to enter Co-Author information as requested by the publication. At times, Authors may not know the e-mail address of a co-author, and may put their own e-mail address in to fulfill the field requirement. This results in the corresponding Author receiving letters that may be intended for co-authors on the submission.

New in EM v9.2, publications may require that all e-mail addresses for authors of a submission be unique. This requirement (configured in PolicyManager) prevents an Author from using their e-mail address for co-authors for whom they do not know an e-mail address.

NOTE: This feature is also available for use by publications that do not use the Co-Author Verification or Registration feature.

When configured, Authors will be presented with an error message alerting them that an e-mail address entered on the Add/Edit Authors step is already associated with an Author record on the submission:


TO CONFIGURE:
To require that all Author e-mail addresses on a submission be unique, go to PolicyManager, Submission Policies, and click the Set Other Author Parameters link. Select/check the new 'Require unique e-mail addresses for all authors of a submission' option, located under the existing 'Set "E-mail Address" Text Entry Box Preference'.

## Set Other Author Parameters

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

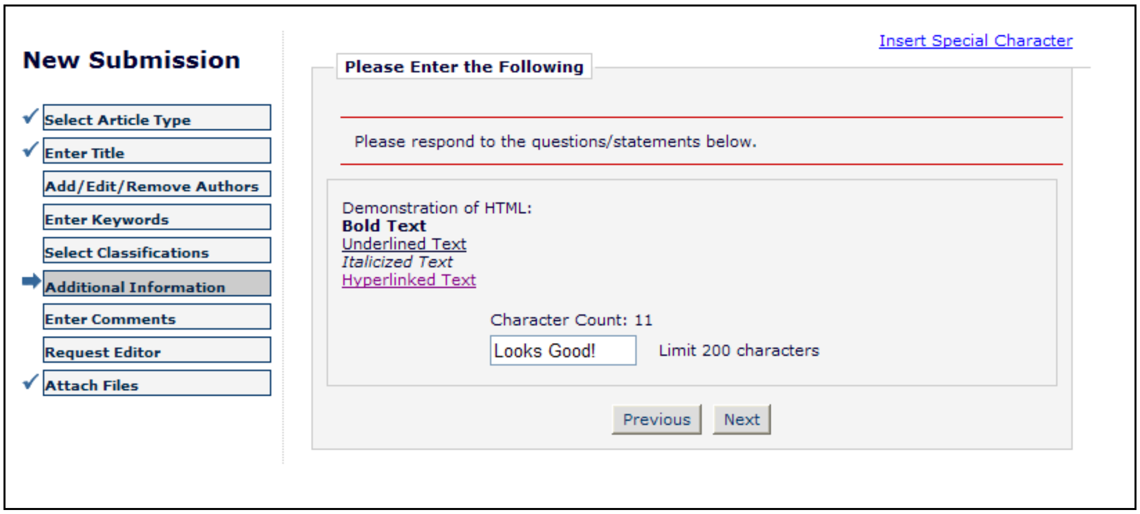
Cancel Submit

**Other Author Parameters**

| | |
|---|---|
| Set "Title" Text Entry Box Preference: | Hidden |
| First Name | Required |
| Set "Secondary First Name" Text Entry Box Preference: | Hidden |
| Set "Middle Name" Text Entry Box Preference: | Optional |
| Last Name | Required |
| Set "Secondary Last Name" Text Entry Box Preference: | Hidden |
| Set "Academic Degree(s)" Text Entry Box Preference: | Hidden |
| Set "Secondary Academic Degree(s)" Text Entry Box Preference: | Hidden |
| Set "Affiliation " Text Entry Box Preference: | Hidden |
| Set "E-mail Address" Text Entry Box Preference: | Optional |
| ☐ Require unique e-mail addresses for all authors of a submission | |
| Set "ISNI" Text Entry Box Preference: | Hidden |
| Set "ORCID" Text Entry Box Preference: | Required |
| Set "PubMed Author ID" Text Entry Box Preference: | Hidden |
| Set "ResearcherID" Text Entry Box Preference: | Hidden |
| Set "Scopus Author ID" Text Entry Box Preference: | Hidden |
| Set "Position" Text Entry Box Preference: | Hidden |
| Set "Secondary Position" Text Entry Box Preference: | Hidden |
| Set "Institution" Text Entry Box Preference: | Hidden |
| Set "Secondary Institution" Text Entry Box Preference: | Hidden |

## HTML on PDF Cover Page

In EM v9.1, publications may include designated Custom Submission Questions and the Corresponding Author's responses on the PDF Cover Page of a submission. Administrators can choose which PDF Cover Page Layouts include the Additional Information Section and which questions and answers will be included in it. Custom Submission Questions can be configured with HTML mark-up so that when they appear to Authors, the questions are rendered with the desired formatting by the browser.




New in EM v9.2, Custom Submission Questions that are displayed on the PDF Cover Page will display the following HTML formatting:

| HTML Start Tag | HTML End Tag | Description |
|---|---|---|
| <a href target= '_blank'> | </a> | Creates a link to a target using the href attribute. |
| <b> | </b> | Boldfaces text. |
| <br> | | Inserts a single line break (HTML). No end tag. |
| <br /> | | Inserts a single line break (XHTML). Self-terminating tag. |
| <em> | </em> | Emphasizes text; most browsers display it as italic. |
| <i> | </i> | Italicizes text. |
| <strong> | </strong> | Emphasizes text; most browsers display it as bold. |
| <u> | </u> | Underlines text. |

**Betsy's 9.2 Test Site**

**Demonstration of HTML on Custom Submission Questions**

--Manuscript Draft--

| | |
|---|---|
| Manuscript Number: | |
| Article Type: | Betsy Article |
| Keywords: | |
| Corresponding Author: | Mary François Smith, PhD<br><br>North Andover, MA UNITED STATES |
| First Author: | Mary François Smith, PhD |
| Order of Authors: | Mary François Smith, PhD |
| Additional Information: | |
| **Question** | **Response** |
| Demonstration of HTML:<br>**Bold Text**<br>Underlined Text<br>*Italicized Text*<br>Hyperlinked Text | Looks Good! |

TO CONFIGURE:
No configuration is required to use this feature. Upon upgrade to v9.2, any Custom Submission Questions containing the above specified HTML will display with that formatting on the PDF Cover Page for the submission.

## Custom Submission Question Enhancements

In EM v9.1, Publications may develop Custom Submission Questions that are then combined into Author Questionnaires. These Questionnaires can be displayed to Authors (based on Article Type) on the 'Additional Information' page of the submission process. Once a question is asked, the question can be removed from questionnaires and hidden, but the text of the question cannot be edited to protect the historical integrity of the question asked of the Authors.

New in v9.2, Administrators may edit the available List Values for a question even after it has been asked on a Questionnaire. If an Author (or Editor) is answering/editing a custom submission question for Rev 0 of the submission at the time a list is modified, the Author (or Editor) is presented with the list in place at the time the submission was started.

If a submission is sent out for revision, the new responses are saved for each revision where the question is asked. If an Author has selected a value that is subsequently hidden, that value will still be available to the Author on the revision.

If an Author (or Editor) changes an Article Type for a submission, and the new Article Type contains a question that was asked of the Author on the former Article Type, this answer is now retained in v9.2. This allows the Author or Editor to change Article Types without losing data, such as in a case where an Article Type was changed accidentally.

When a question is configured to display on the *Details* page for a submission, the *Details* page will display all questions associated with all revisions of the submission, and the most recent selected response (or responses in the case of multi-selections) for each question.

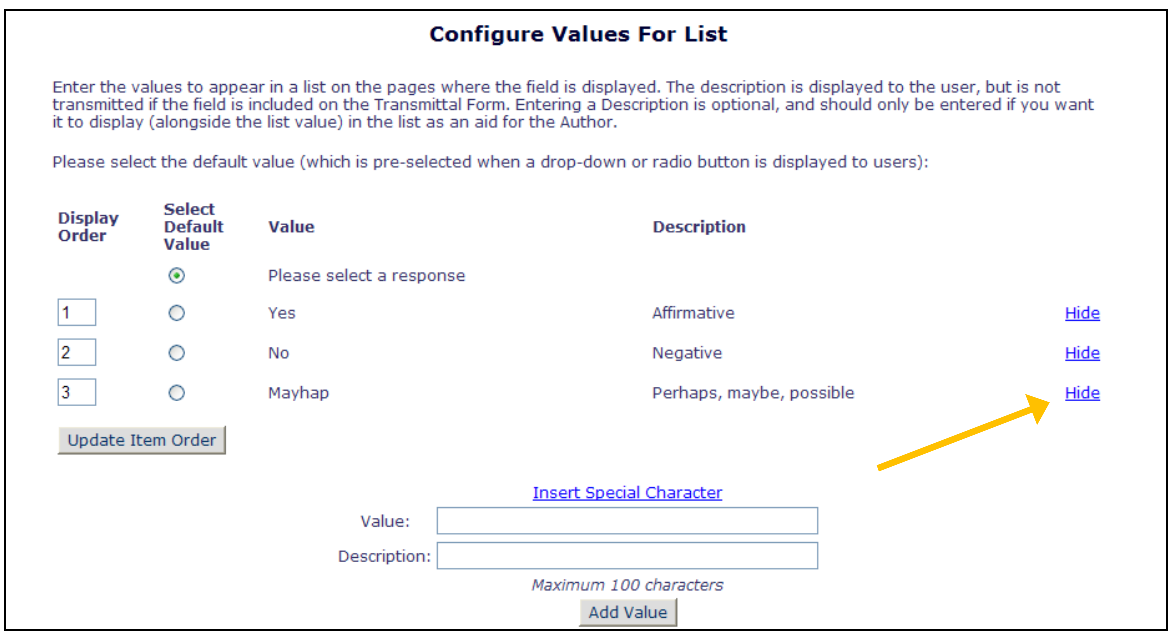
When a question is configured to display on the PDF Cover Page for a submission, the most recent selected response (or responses in the case of multi-selections) displays for each question. Per existing functionality, configured questions display in the following order:

1. Questions asked only at initial submission are listed first, in the order they were asked.
2. Next, questions that were asked both on initial submission and a subsequent revision are listed, in the order they were asked at revision.
3. Lastly, questions that were only asked upon revision are listed in the order they were asked at revision.

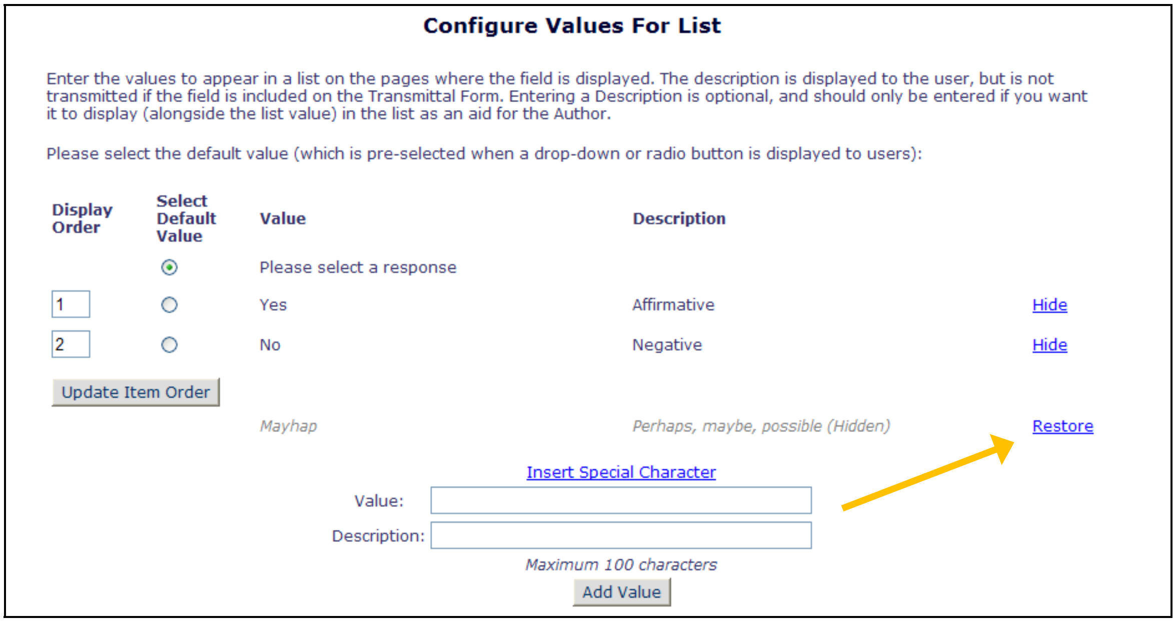
TO CONFIGURE:
To edit the List Values of an existing Custom Submission Question, go to PolicyManager, Submission Policies, <u>Create Custom Submission Questions</u>, and Edit an existing list-type question. Click the 'View/Edit Values for List' link to open the List Values page.


The *Configure Values For List* page displays allowing administrators to hide or add terms even after a question has been asked.

If the question has been asked, then the list values cannot be removed, but they can be hidden using the Hide link next to the term.

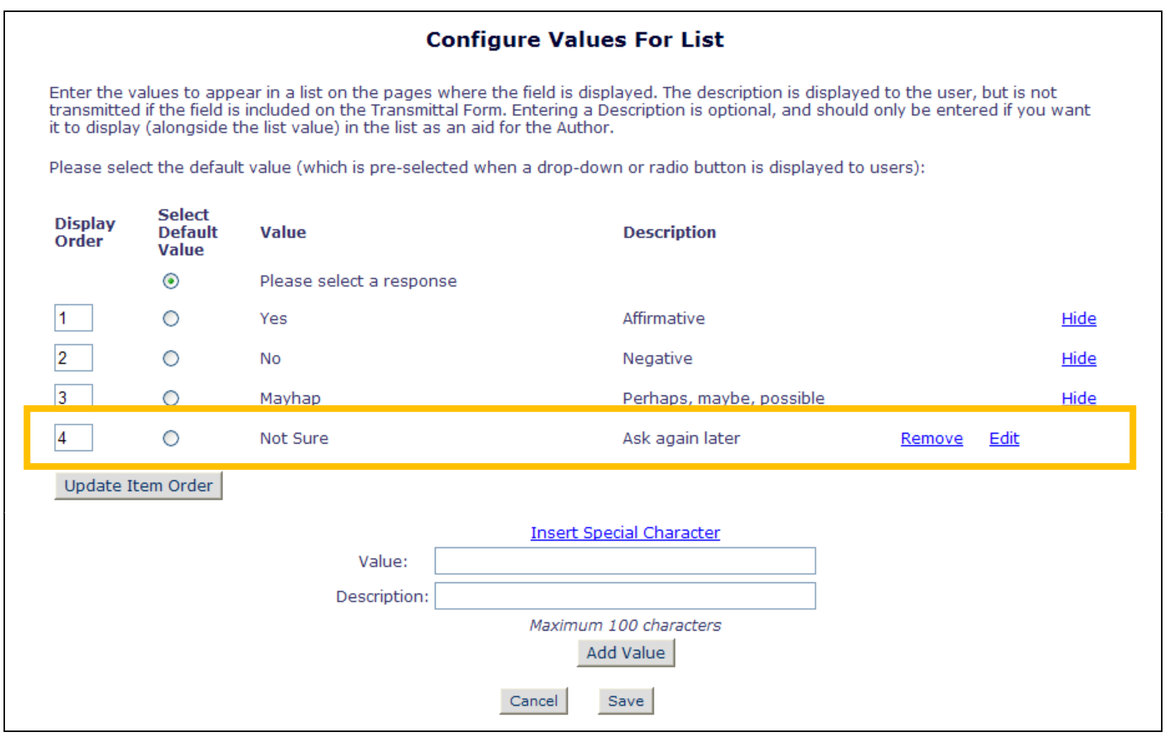



When a List item has been hidden, it displays beneath the list in gray italics, with a Restore link available to add the item back to the list.




Hidden Items are suppressed as a response choice for submissions started after the item is hidden, or revisions started after the item is hidden (unless the Author selected the Hidden Item as the response for a previous revision).

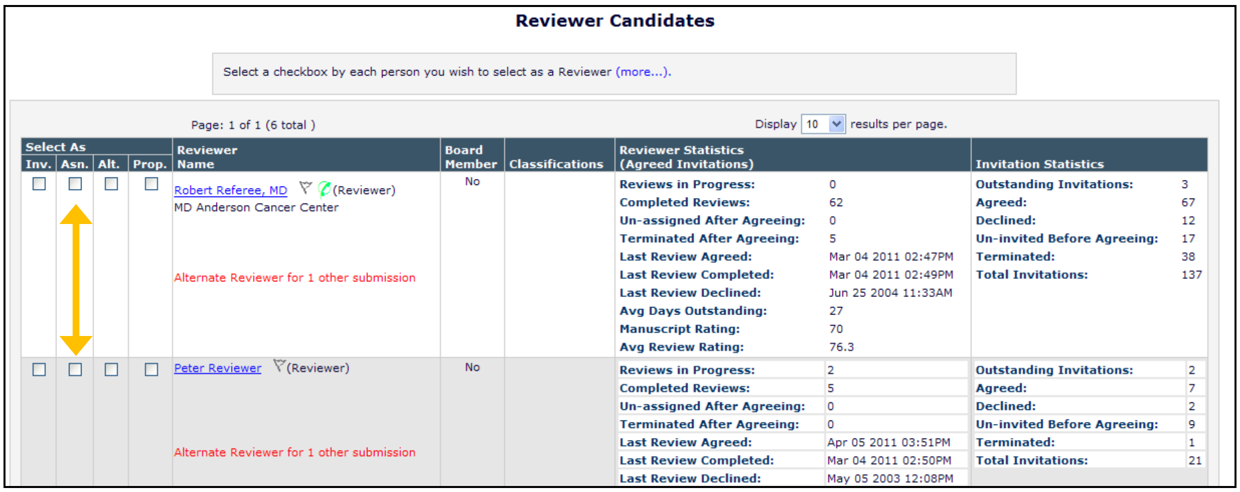
New items may be added to the list. The new item has a Remove and an Edit link available until the 'Save' button on this page is closed. This allows Administrators to modify the list prior to committing changes to the system.



## Assign Reviewers

In EM v9.1, Editor roles may be given permission to Invite Reviewers, Select Alternate Reviewers, or Propose Reviewers for other Editors to invite.   Reviewers are sent initiations, and they must accept or decline the invitation to review a submission.

New in EM v9.2, Editors may now Assign Reviewers directly to a submission, eliminating the step where the Reviewer Accepts or Declines an invitation.  When an Editor role has permission to Assign Reviewers, a new 'Asn.' checkbox is displayed for each Reviewer in the Reviewer Candidates grid (displayed after any Reviewer search is executed).




If the Editor has permission to Invite Reviewers as well as Assign, the 'Asn.' box displays to the right of the existing 'Inv.' box.  Only one box may be selected for each Reviewer.

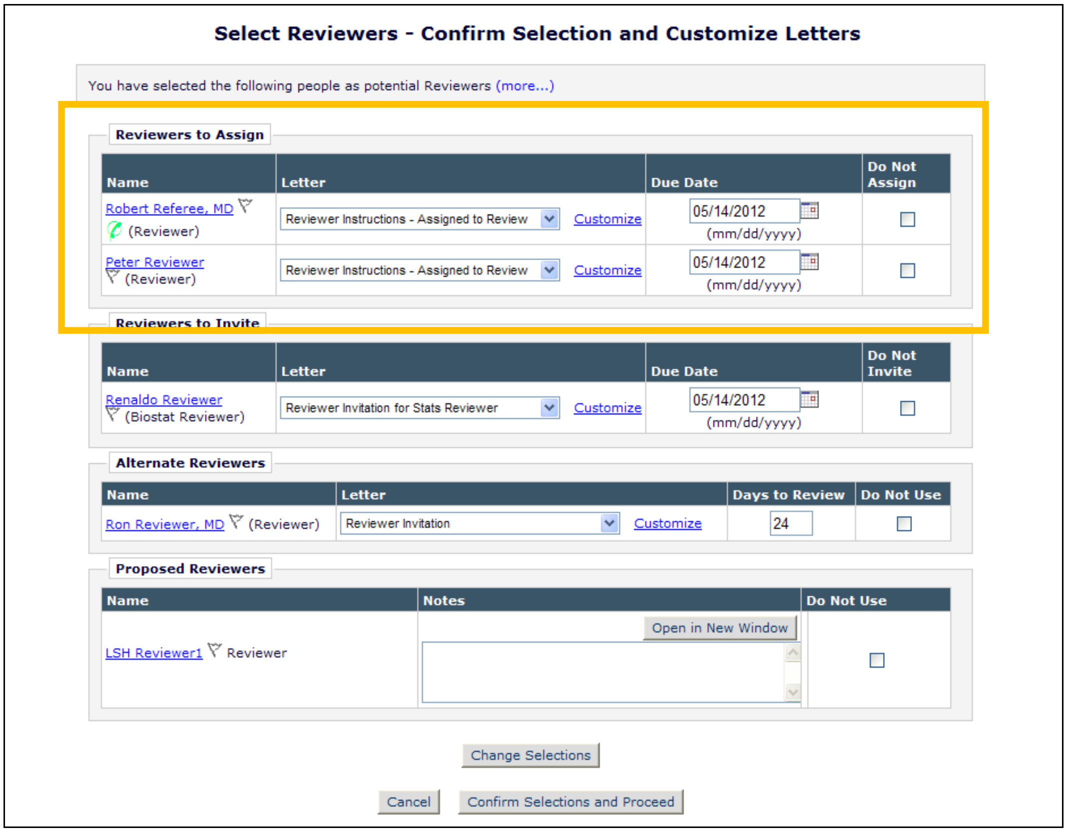
When the desired Reviewers are selected, the Editor clicks the 'Proceed' button to continue to the 'Confirm Selections' page.  This page is enhanced to now show 4 potential types of Reviewers being selected:

- Reviewers to Assign
- Reviewers to Invite
- Alternate Reviewers
- Proposed Reviewers

The letter selected for the new event 'Reviewer Assigned (Not Invited)' is selected in the 'Letter' drop-down and may be customized.  The Editor may choose any letter from the 'Reviewer Invitation' letter family (the same as for the existing Invite Reviewers letter option).

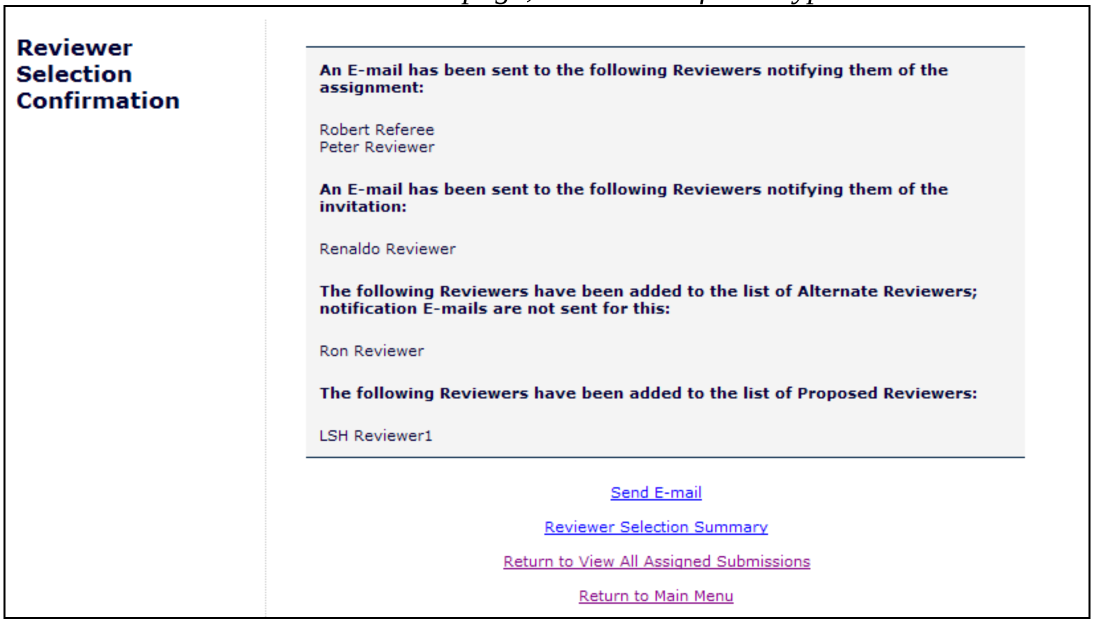
The 'Due Date' entry box and associated calendar icon are displayed whether the publication is operating in either Invitation or Agreed mode (when the Editor has the 'Override Reviewer Due Date' permission) because assigning a Reviewer generates an invitation date and an acceptance/agreed date, both equal to the assignment date.  The date shown in the date entry box is calculated by adding the ‘Days to Review this Article Type’ to the current date, taking into consideration the ‘Calendar days’ or ‘Working Days’ setting in PolicyManager.

Selecting the ‘Do Not Assign’ checkbox for a Reviewer will not Assign that Reviewer when the ‘Confirm Selections and Proceed’ button is clicked, similar to the ‘Do Not Invite’ checkbox for invited Reviewers.



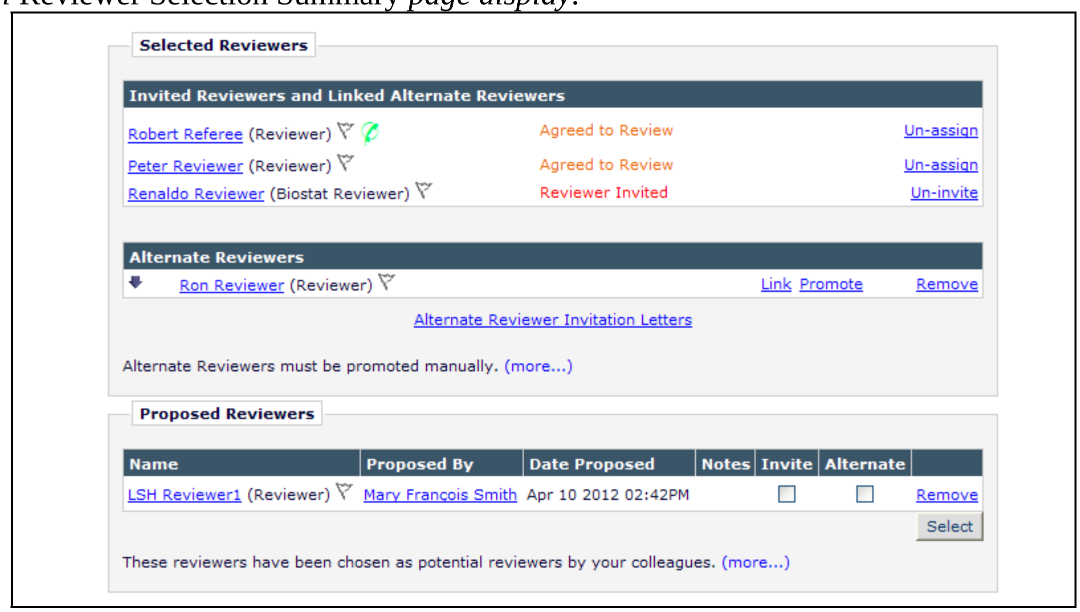

When the ‘Confirm Selections and Proceed’ button is clicked, any Reviewers (where the ‘Do Not Assign/Invite/Use’ checkbox has not been selected) are sent the appropriate letter (or added to the appropriate lists for future use).

*Sample* Reviewer Selection Confirmation *page; Reviewers of each type have been selected:*




Assigned Reviewers now display with the Reviewer status of 'Agreed to Review' on the *Reviewer Selection Summary*, *Details*, and folders where Reviewer Statuses are displayed.

*Partial* Reviewer Selection Summary *page display:*

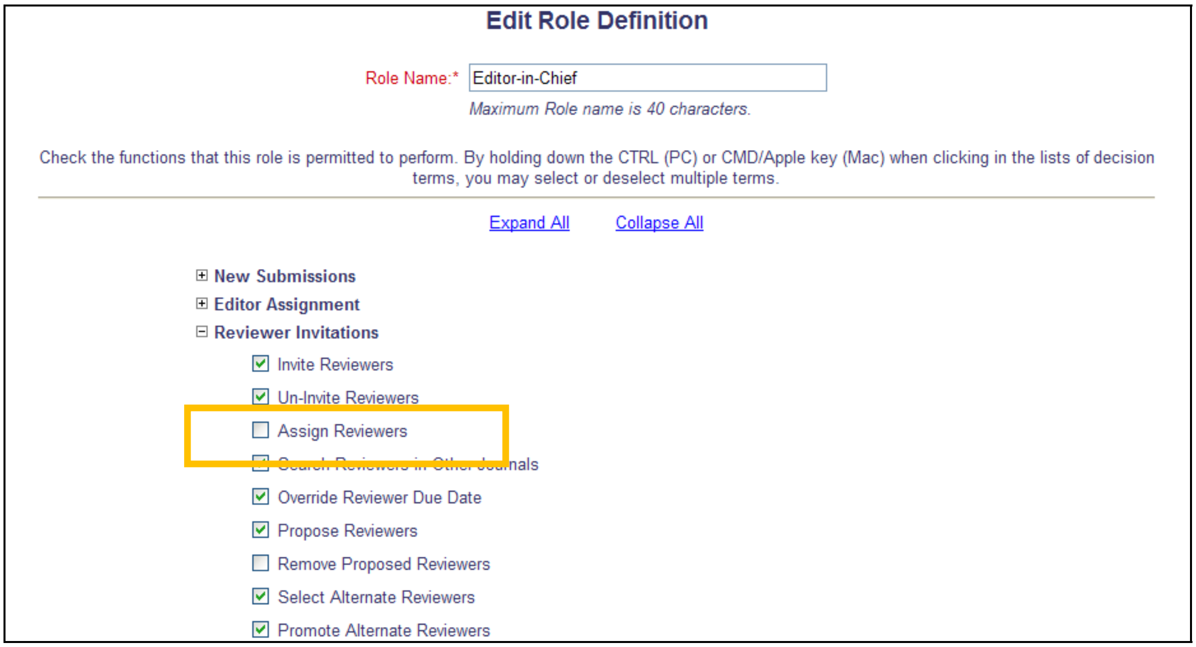



NOTE: If Reviewers are Assigned and Invited at the same time, the document status will change to the status set for the new 'Reviewer Assigned (Not Invited)' event.

Reviewers that are assigned to a submission will find the submission in their 'Pending Assignments' folder instead of the 'New Reviewer Invitations' folder. Publications may use a new Deep Link Merge field - %PENDING_ASSIGNMENTS_DEEP_LINK% - in the Reviewer

Assignment letter.  This deep link will bring the Reviewer directly to the ‘Pending Assignments’ folder.

TO CONFIGURE:
To enable Editors to Assign Reviewers, go to RoleManager and Edit the role to which you wish to grant this permission.  In the ‘Reviewer Invitations’ section, select/check the new ‘Assign Reviewers’ permission.  This permission is not selected for any role on upgrade to v9.2.




A new Event is added to the ‘Reviewer Assigned’ section of ActionManager called “Reviewer Assigned (Not Invited)”.  On upgrade to v9.2, the Document Status associated with this Event is ‘No Change’, however publications may select any Document Status in the associated drop-down menu should they choose to do so.

**Reviewer Assigned**

| Event | New Document Status | Warnings | Alternative Text for Authors |
|---|---|---|---|
| Request Unregistered Reviewer | No Change | | |
| Reviewer Invited | Reviewer invited | | |
| Reviewer Assigned (Not Invited) | No Change | | |
| Reviewer Agree | Under Peer Review | | |
| Reviewer Decline | No Change | | |
| Review Due Date Changed | No Change | | |
| Un-invite Reviewers Before Agreeing to Review | No Change | | |
| Un-assign Reviewers After Agreeing to Review | No Change | | |
| Re-open Review | No Change | | |
| Promote Alternate Reviewers | Reviewer invited | | |
| Review Assignment Completed | No Change | | |

Letters may also be configured for this Event, though none are configured on upgrade. Similar to the existing ‘Reviewer Agree’ or ‘Reviewer Decline’ events, the following roles may receive letters if configured:

- The Reviewer being assigned
- The lowest Editor in the Editor chain for the submission that has not yet made a decision
- The Special Relationship Editor

**Reviewer Assigned**

| Event | Reviewer Letters |
|---|---|
| Request Unregistered Reviewer | NONE |
| Reviewer Invited | Reviewer Invitation |
| Reviewer Assigned (Not Invited) | NONE |
| Reviewer Agree | Reviewer Instructions and Due Date |
| Reviewer Decline | NONE |
| Review Due Date Changed | NONE |
| Un-invite Reviewers Before Agreeing to Review | NONE |
| Un-assign Reviewers After Agreeing to Review | NONE |
| Re-open Review | Reviewer Assignment Re-opened |
| Promote Alternate Reviewers | Reviewer Invitation |
| Review Assignment Completed | Reviewer Thank You |
| Required Reviews Complete | NONE |

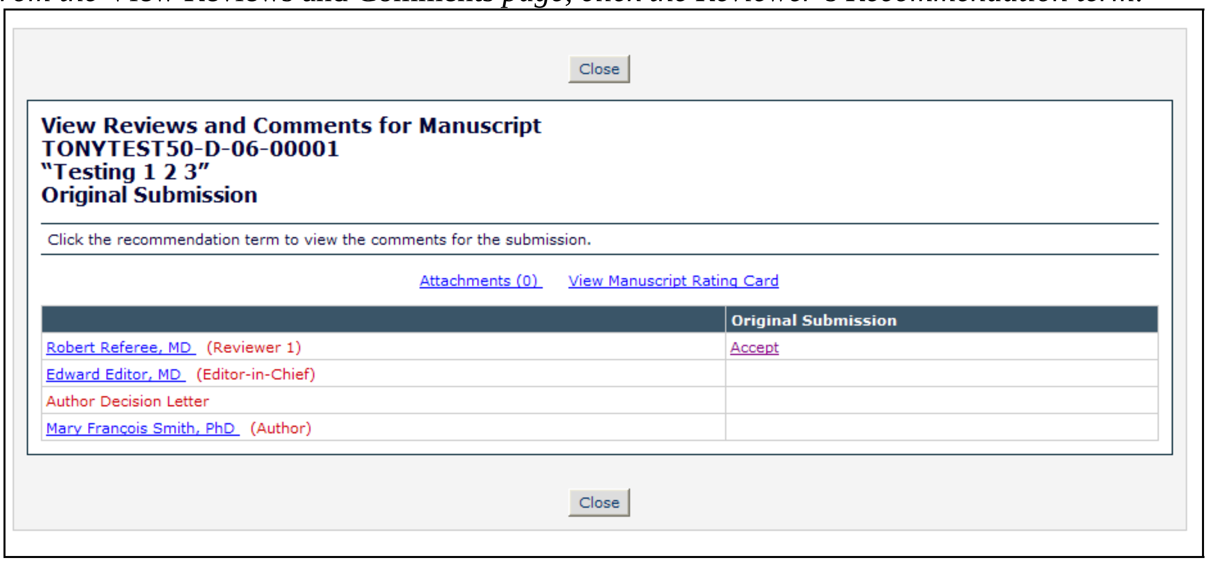
NOTE: Though you may select a letter from any letter family (except Ad Hoc families) in ActionManager, it is recommended that you select a letter from the Reviewer Invitation Letter Family.

## Re-open Review

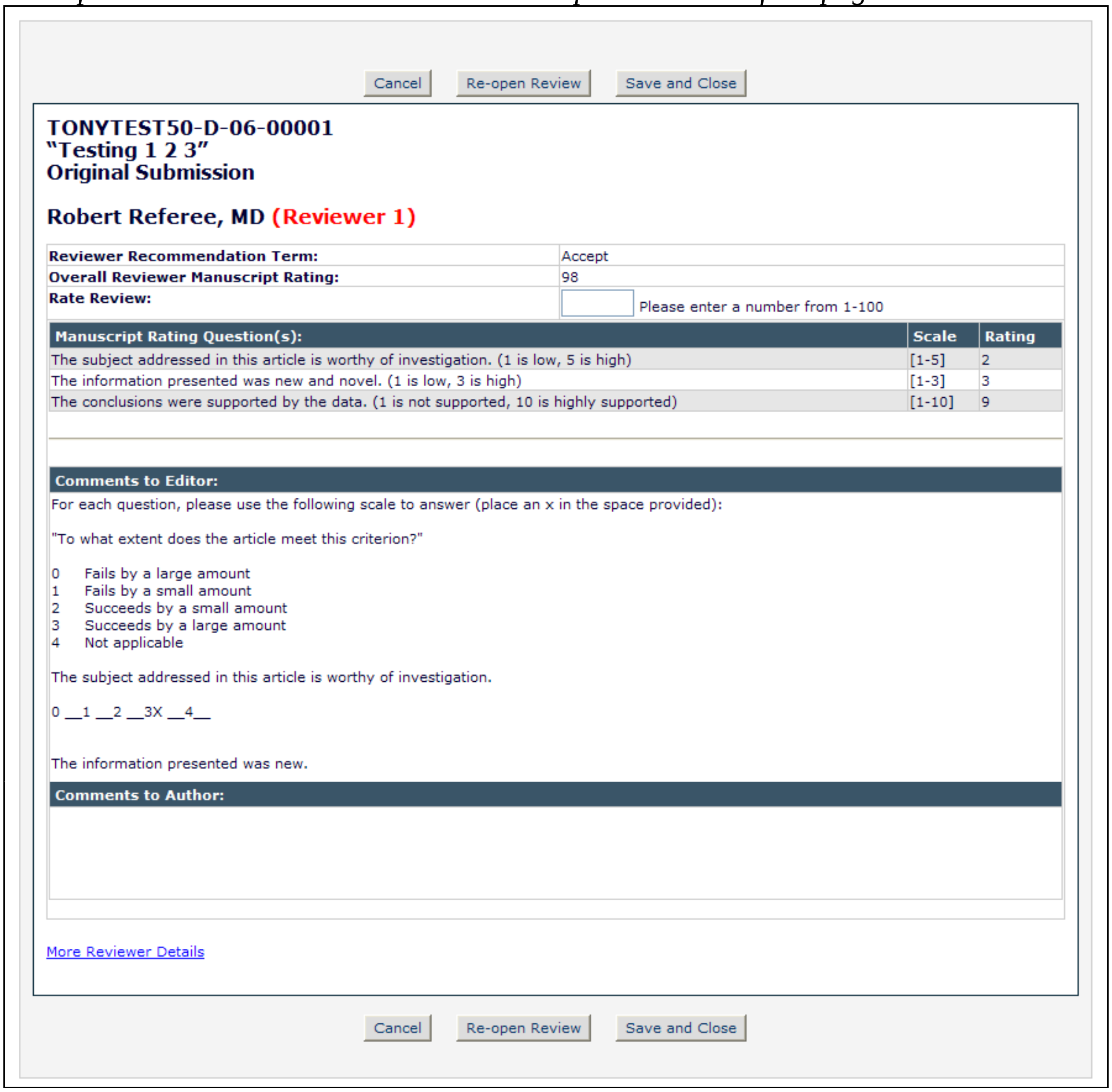
Editorial staff may, on occasion, wish to re-open, or send back, a Review to a Reviewer, either for potential editing, additional information, or at times to allow edits to attachments. New in EM/PM v9.2, a 'Re-open Review' feature is available for Editors (with proper permission).

When an Editor Role has the new 'Re-Open Review' permission enabled, and the Editor is either the Special Relationship Editor (where there is at least one open Editor Assignment), or the Editor is the Editor with the current open assignment, then that Editor will see a new 'Re-Open Review' button on the *View Individual Reviews and Comments* page, accessed from the *View Reviews and Comments* page. NOTE: Reviews cannot be re-opened if the current Editor has started and saved a Decision.

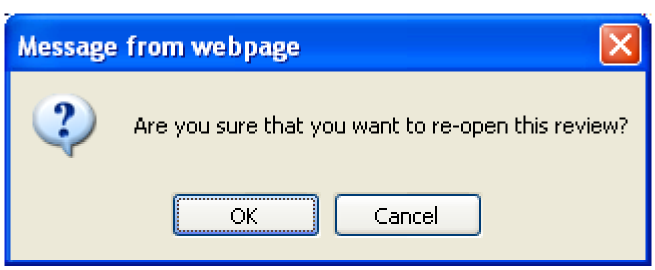
*From the* View Reviews and Comments *page, click the Reviewer's Recommendation term:*



*The 'Re-open Review' button is available at the top and bottom of the page:*




Clicking this button will prompt the Editor to confirm they wish to re-open the review:




Clicking 'OK' on the warning will bring the Editor to the *Re-Open Review and Customize Letter* page. The Reviewer is displayed with the default letter (configured for the new 'Re-open Review' event) shown. Editors may customize the letter, or select a different letter from the 'Reviewer Invitation' letter family in the drop-down. Editors may also choose to not send the letter by selecting/checking the box in the "Do Not Send Letter" column. NOTE: If this box is selected, the review will still be re-opened, but the Reviewer will not receive a notification.


**Re-open Review and Customize Letter**

You have chosen to re-open the review for the Reviewer listed below.

Click **Customize** if you want to personalize the letter. Once you have customized the letter, an asterisk is displayed next to the Reviewer's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to the Reviewer, click the Letter drop-down box next to the Reviewer's name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If you do not want to send a letter, check the Do Not Send Letter box next to the Reviewer's name. When you click **Confirm Selection and Send Letters**, that person will not be sent a letter. (less...)

**Reviewer**

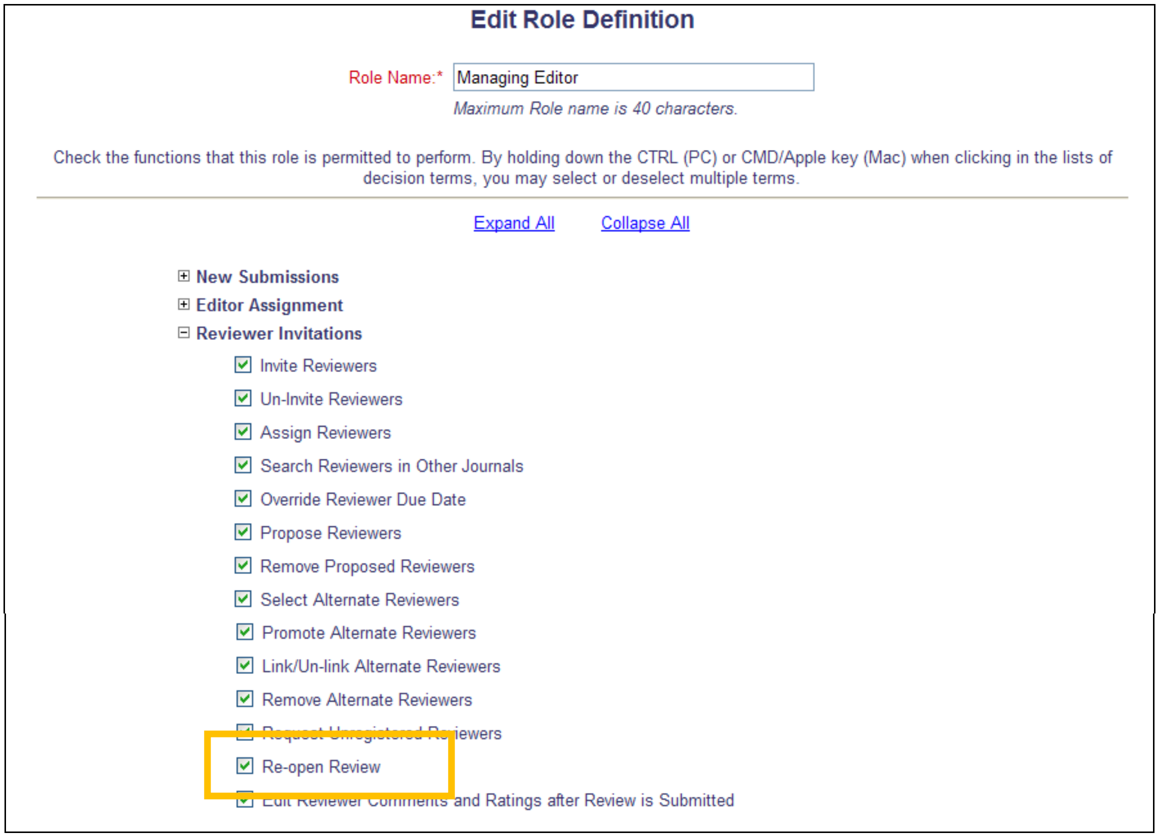
| Name | Letter | | Do Not Send Letter |
|---|---|---|---|
| Robert Reviewer (Reviewer) | Review Sent Back to Reviewer | Customize | ☐ |

Cancel | Confirm Selection and Send Letter

When the Review is re-opened, the Reviewer Statistics for this Reviewer will be updated, however, the Due Date will not be updated. If an Editor wishes to change the Reviewer Due Date, they must do so from the *Details* page for the submission.

When a Review is re-opened, if the number of completed reviews then becomes less than the Required Reviews for the submission, the status may be updated to the status configured for 'Reviewer Agree', 'Reviewer Assigned (not Invited)' (if Reviewer Agree is 'No Change'), or 'Reviewer Invited' (if both Reviewer Agree and Reviewer Assigned are set to 'No Change').

TO CONFIGURE:
To enable Editors to re-open reviews, go to RoleManager, edit the desired role(s), and select/check the new 'Re-open Review' permission in the Reviewer Invitations section. This permission is not selected/checked on upgrade to v9.2.




A new letter event, 'Re-open Review' is added to ActionManager. Letters configured for this event may be sent to the Reviewer whose review is being re-opened, and the Special Relationship Editor for the current version of the submission. The document status associated with this Event is 'No Change', however, when a Review is re-opened, if the number of completed reviews then becomes less than the Required Reviews for the submission, the status may be updated to the status configured for 'Reviewer Agree', 'Reviewer Assigned (not Invited)', or 'Reviewer Invited'.

NOTE: The letter must be in the Reviewer Invitation letter family.

*Sample* ActionManager *page; Reviewer Letters*

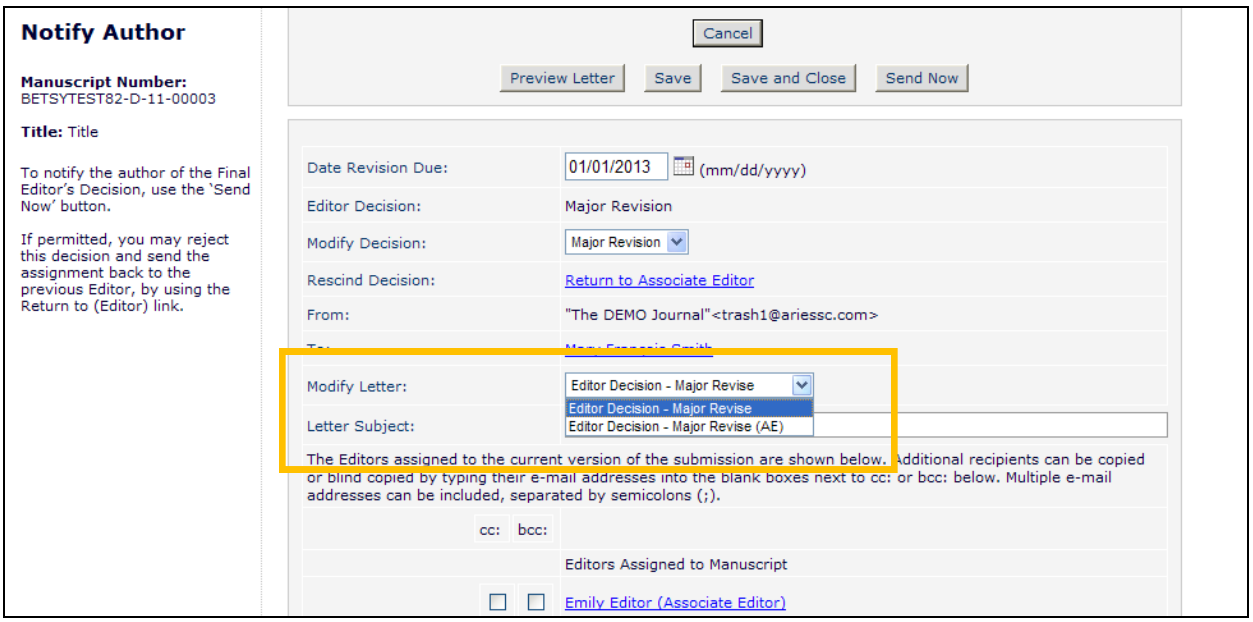
**Reviewer Assigned**

| Event | Reviewer Letters |
|---|---|
| Request Unregistered Reviewer | NONE |
| Reviewer Invited | Reviewer Invitation |
| Reviewer Assigned (Not Invited) | Reviewer Instructions - Assigned to Review |
| Reviewer Agree | Reviewer Instructions and Due Date |
| Reviewer Decline | NONE |
| Review Due Date Changed | NONE |
| Un-invite Reviewers Before Agreeing to Review | NONE |
| Un-assign Reviewers After Agreeing to Review | NONE |
| Re-open Review | Reviewer Assignment Re-opened |
| Promote Alternate Reviewers | Reviewer Invitation |
| Review Assignment Completed | Reviewer Thank You |
| Required Reviews Complete | NONE |

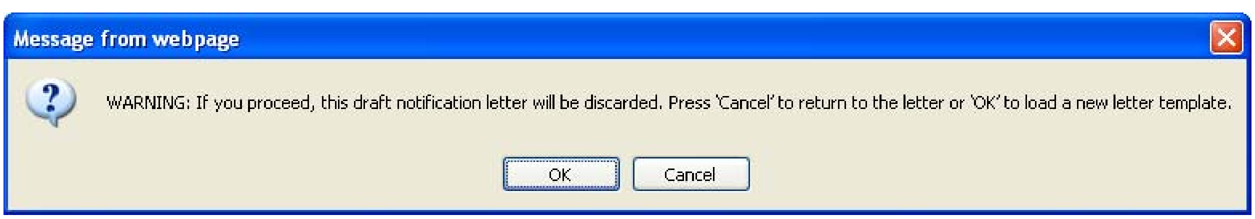
## Multiple Decision Letters

Many publications allow Editors to draft Author Notification letters before they are sent by the Editorial Office, and there may be many Editors with permission to make decisions for submissions. Additionally, publications may have Authors submitting in more than one language, and may find it beneficial to have Decision letters in languages other than the publication's primary language.

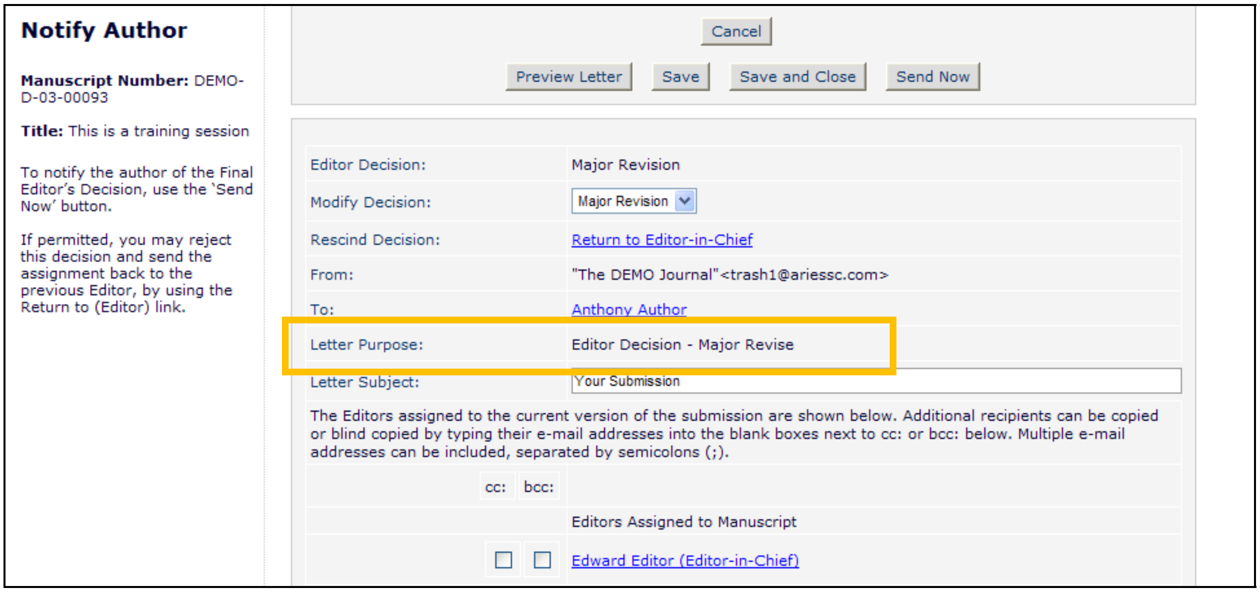
New in EM/PM v9.2, publications may configure multiple letters in the 'Decision' letter family as options for a specific term. When multiple letters are configured for a decision, the row under the 'To:' field displays the label 'Modify Letter:', with a drop-down list showing all available letters configured for the Decision term.




If the Editor selects a different letter from the drop-down menu, they are warned that they will discard any changes to the current letter.




NOTE: If the *Notify Author* page is populated with a Saved Author Notification, the 'Letter Purpose' is plain text, not a dropdown menu, even if multiple letters have been configured for the selected Decision Term.




TO CONFIGURE:
To associate multiple letters with a Decision Term, first, go to PolicyManager, E-mail and Letter Policies, Edit Letters, and Add additional letters to the 'Decision' letter family. When multiple letters are available, go to Edit Editor Decision Terms in the 'Reviewer and Editor Form Policies' section of PolicyManager. Add a New Term, or click Edit next to an existing term.

**Editor Decision Terms**

Listed below are the terms used for Editor Decisions. You may Add new terms, Remove, Edit or Hide existing terms. Note that the New Document Status will not take effect until the Author is notified of the Editor Decision. After this, Editors, Publishers and Reviewers with permission to view the current Status will see the New Document Status term; Authors will see the Alternative Text for Authors where one exists, otherwise they will also see the New Document Status Term.

Cancel | Add New Term

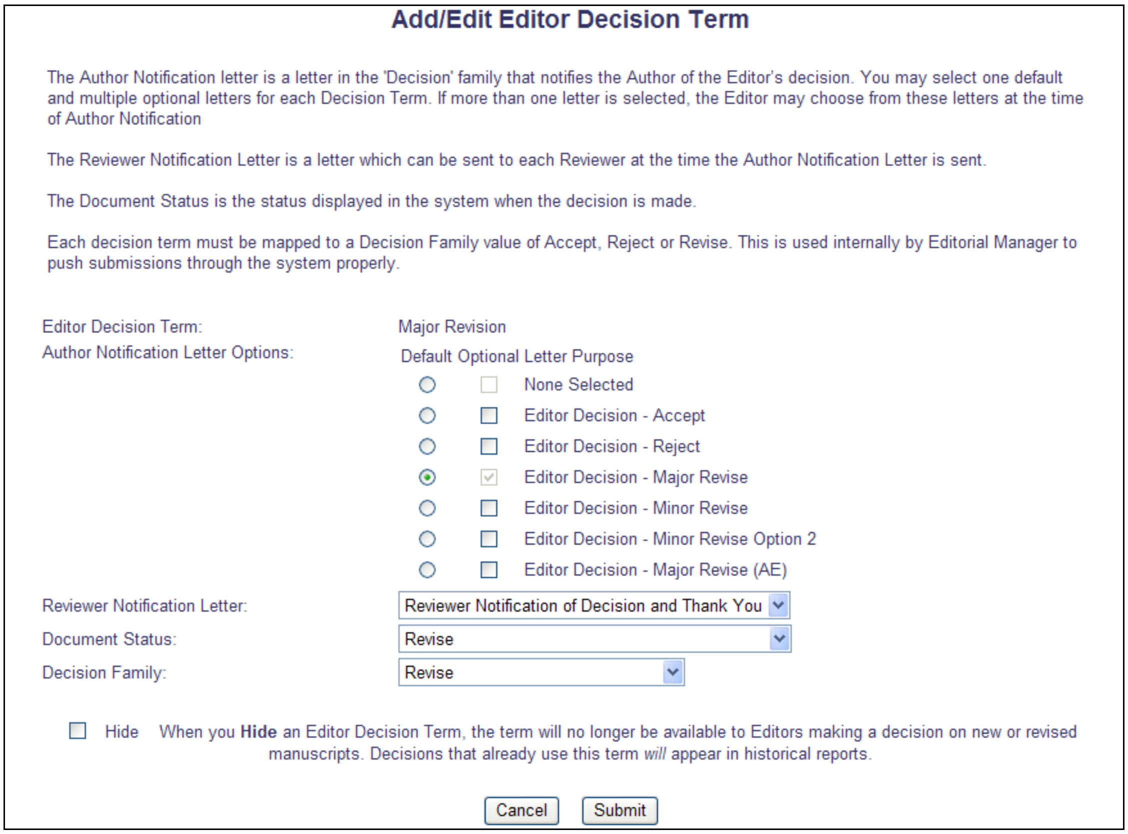
Update Order

| Order | Editor Decision Term | Author Notification Letter | Reviewer Notification Letter | New Document Status | Alternative Text for Authors | Decision Family | | |
|---|---|---|---|---|---|---|---|---|
| 1 | Minor Revision | Editor Decision - Minor Revise | Reviewer Notification of Decision and Thank You | Revise | | Revise | Remove | Edit |
| 2 | Reject | Editor Decision - Reject | Reviewer Notification of Decision and Thank You | Reject | | Reject | Remove | Edit |
| 3 | Major Revision | Editor Decision - Major Revise | Reviewer Notification of Decision and Thank You | Revise | | Revise | Remove | Edit |
| 4 | Accept | Editor Decision - Accept | Reviewer Notification of Decision and Thank You | Accept | | Accept | Remove | Edit |

On the *Add/Edit Editor Decision Term* page, all letters in the 'Decision' letter family are displayed with two options available for each letter:

- Default – when this radio button is selected, the letter will be the default letter to load on the *Notify Author* page.  NOTE:  The ‘None Selected’ option is a valid option for a Decision Term.  When this is selected, Editors will never see the *Notify Author* page.
- Optional – when this checkbox is selected/checked for a letter, then that letter will be available as an alternate letter to Editors on the *Notify Author* page.

NOTE:  The letter associated with a decision term in v9.1 will be selected as the default letter on upgrade to v9.2.



**Add/Edit Editor Decision Term**

The Author Notification letter is a letter in the 'Decision' family that notifies the Author of the Editor's decision. You may select one default and multiple optional letters for each Decision Term. If more than one letter is selected, the Editor may choose from these letters at the time of Author Notification

The Reviewer Notification Letter is a letter which can be sent to each Reviewer at the time the Author Notification Letter is sent.

The Document Status is the status displayed in the system when the decision is made.

Each decision term must be mapped to a Decision Family value of Accept, Reject or Revise. This is used internally by Editorial Manager to push submissions through the system properly.

Editor Decision Term: Major Revision

Author Notification Letter Options:

| Default | Optional | Letter Purpose |
|---|---|---|
| ○ | ☐ | None Selected |
| ○ | ☐ | Editor Decision - Accept |
| ○ | ☐ | Editor Decision - Reject |
| ◉ | ☑ | Editor Decision - Major Revise |
| ○ | ☐ | Editor Decision - Minor Revise |
| ○ | ☐ | Editor Decision - Minor Revise Option 2 |
| ○ | ☐ | Editor Decision - Major Revise (AE) |

Reviewer Notification Letter: Reviewer Notification of Decision and Thank You

Document Status: Revise

Decision Family: Revise

☐ Hide  When you **Hide** an Editor Decision Term, the term will no longer be available to Editors making a decision on new or revised manuscripts. Decisions that already use this term *will* appear in historical reports.

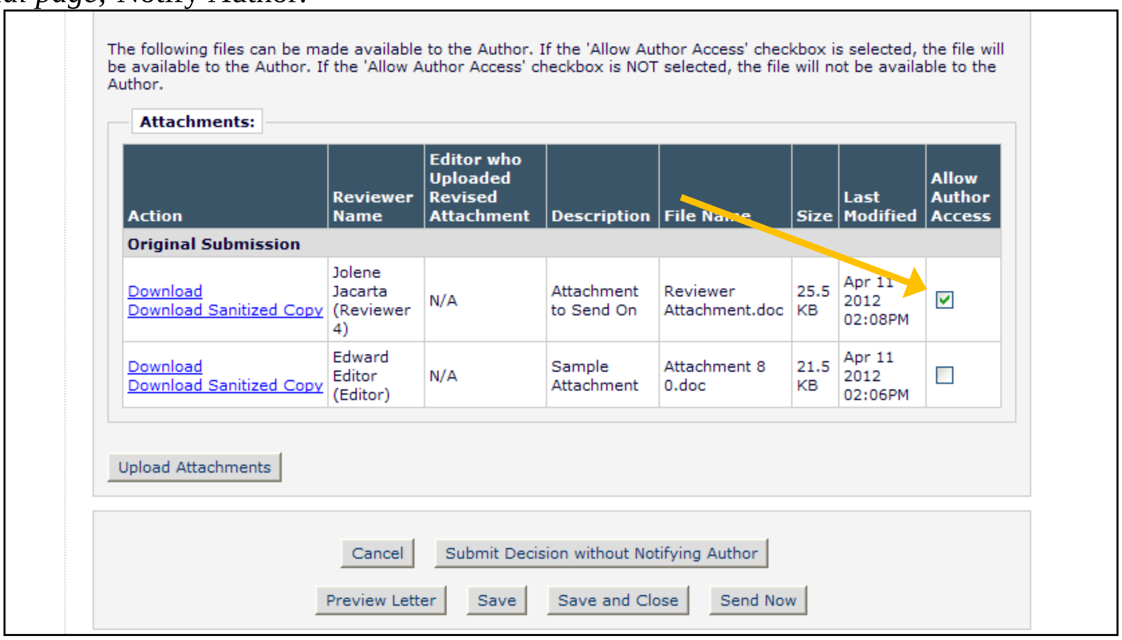
Cancel  Submit

## Include Attachments in Decision Letters

In EM v9.1, Editors and Reviewers may be given permission to add Attachments with their Recommendation or Decision.  These Attachments may be made available to Reviewers or the Author via Deep Links, navigating the user to a page within EM where the files can be downloaded.

New in EM v9.2, Publications may be configured so that Attachments with the ‘Allow Author Access’ designation are automatically attached to the Decision letter sent to the Author.  When this option is enabled for a publication, then when a Decision letter is sent to the Author, any Attachments that are available for the Author will be sent as an attachment in the Notification Letter.

*Partial page;* Notify Author:

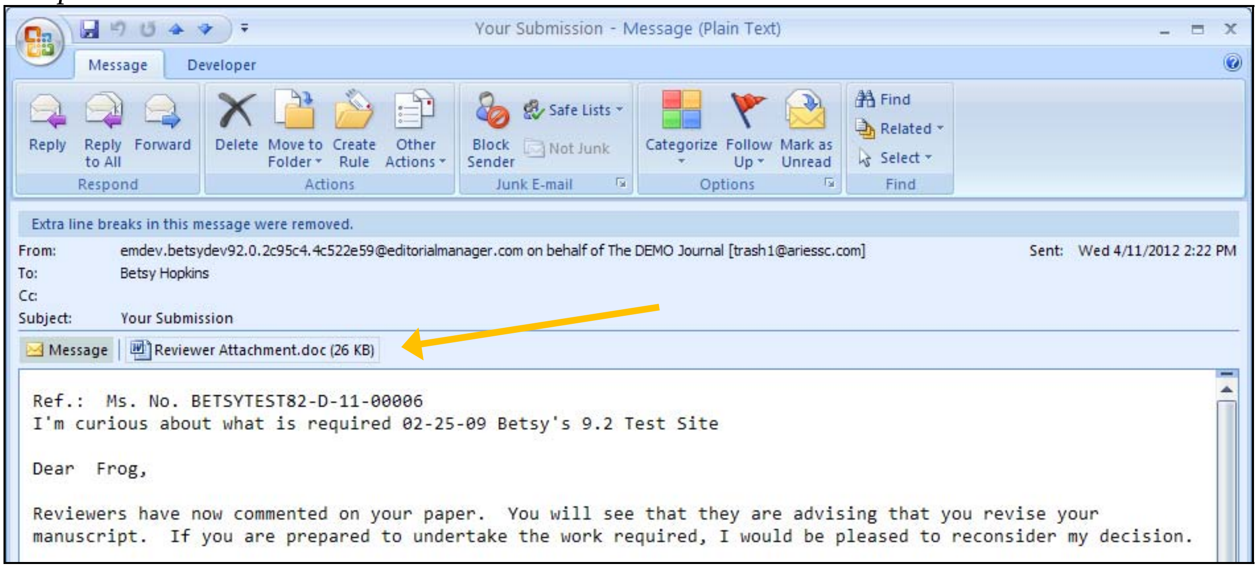


The following files can be made available to the Author. If the 'Allow Author Access' checkbox is selected, the file will be available to the Author. If the 'Allow Author Access' checkbox is NOT selected, the file will not be available to the Author.

**Attachments:**

| Action | Reviewer Name | Editor who Uploaded Revised Attachment | Description | File Name | Size | Last Modified | Allow Author Access |
|---|---|---|---|---|---|---|---|
| **Original Submission** | | | | | | | |
| Download<br>Download Sanitized Copy | Jolene Jacarta (Reviewer 4) | N/A | Attachment to Send On | Reviewer Attachment.doc | 25.5 KB | Apr 11 2012 02:08PM | ☑ |
| Download<br>Download Sanitized Copy | Edward Editor (Editor) | N/A | Sample Attachment | Attachment 8 0.doc | 21.5 KB | Apr 11 2012 02:06PM | ☐ |

*Sample Letter:*




NOTE: Attachments sent with the Decision Letter are counted in the 'E-mail Attachment Downloads' section of the publication's File Transfer Statistics, found in AdminManager.

**File Transfer Statistics**

Between Apr 1 2012 12:00AM and Apr 11 2012 2:24PM.

| Submission Items | | | | | |
|---|---|---|---|---|---|
| File Uploads | | File Downloads | | Total | |
| Number | Size | Number | Size | Number | Size |
| 2 | 0.05 MB | 33 | 0.58 MB | 35 | 0.62 MB |

| Production Items | | | | | |
|---|---|---|---|---|---|
| File Uploads | | File Downloads | | Total | |
| Number | Size | Number | Size | Number | Size |
| 0 | 0 MB | 0 | 0 MB | 0 | 0 MB |

| Attachments | | | | | |
|---|---|---|---|---|---|
| Attachment Uploads | | Attachment Downloads | | Total | |
| Number | Size | Number | Size | Number | Size |
| 2 | 0.05 MB | 0 | 0 MB | 2 | 0.05 MB |

| E-mail Attachments | | | | | |
|---|---|---|---|---|---|
| E-mail Attachment Uploads | | E-mail Attachment Downloads | | Total | |
| Number | Size | Number | Size | Number | Size |
| 0 | 0 MB | 1 | 0.02 MB | 1 | 0.02 MB |

| Transfers from arXiv.org | |
|---|---|
| Number | Size |
| 0 | 0 MB |

File Transfer Statistics Selection Criteria

AdminManager Main Menu

TO CONFIGURE:
To use the Attachments feature, contact your Aries representative. For publications already using the Attachments feature, the new option to include the files in the Decision Letter is enabled in PolicyManager, on the *Configure Attachment Security* page.

Select/check the new ‘Include available Editor/Reviewer Attachments with the Author Notification letter as e-mail attachments’ option found in the ‘Author Access’ section of the page (at the bottom of the page).

*Partial page display; new setting at the bottom of the page:*

### Configure Attachment Security

Cancel Submit

**Sanitization**

Files uploaded by Editors and Reviewers as part of their work on the submission ("Attachments") may be made available to the Author and other Reviewers. Check the box below and click the 'Submit' button to "sanitize" these files by removing identifying information from the 'File Properties' and 'Track Changes' features of Microsoft Office files, and the 'Properties' of PDF files. PDF annotations (with the exception of dynamic stamps) are also sanitized. Note: any personal identifying information included in the actual text of the file must be removed manually.

If sanitization is enabled, Authors will only have access to the sanitized version of the Attachments. Editors will have access to both the original and sanitized files. Reviewers will have access to the original files unless the checkbox 'Allow other Reviewers access only to Attachments with personal information removed' is selected.

[MIDDLE OF PAGE OMITED]

**Author Access**

When the final decision is made and the Notification letter is sent to the Author, files the Editors and Reviewers have uploaded that are marked as available to the Author may be included. To append these files to the Notification letter as e-mail attachments, select the option below. Deep links to access the files via the EM interface may also be used in the body of the letter. Both options may be used together, if desired.

☐ Include available Editor/Reviewer Attachments with the Author Notification letter as e-mail attachments

Cancel Submit

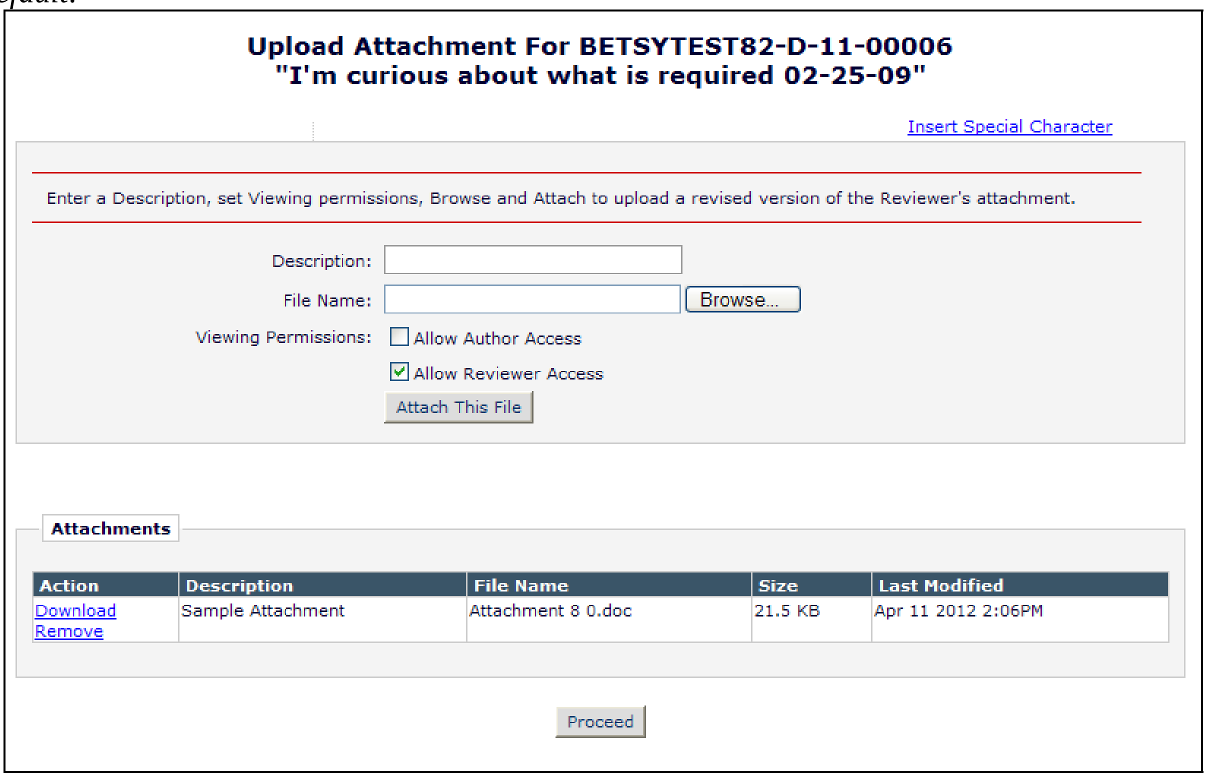
NOTE: This feature is not selected on upgrade to v9.2.

## Automatically Designate Attachment Availability

In EM v9.1, Editors and Reviewers may be given permission to add Attachments with their Recommendation or Decision.  These Attachments may be made available to other Reviewers or the Author by Editors from various areas of the system.

New in EM v9.2, publications may configure all attachments to be marked as available to Authors or available to Reviewers at the time the file is uploaded.  When configured, these files automatically have the ‘Allow Author Access’ or ‘Allow Reviewer Access’ checkbox(es) selected on upload.  Editors (with Upload Attachments permission enabled) may deselect these options at any time.

*Sample* Upload Attachment for Editor *page; Allow Reviewer Access configured to be selected by default:*




TO CONFIGURE:
To use the Attachments feature, contact your Aries representative.  For publications already using the Attachments feature, the new option to automatically make uploaded files available to Reviewers and/or Authors is added in PolicyManager, on the *Configure Attachment Security* page.  Publications may configure the following:

- Editor-uploaded Attachments available to Reviewers
- Editor-uploaded Attachments available to Authors
- Reviewer-uploaded Attachments available to Reviewers
- Reviewer-uploaded Attachments available to Authors

NOTE: Though these can be configured as the default settings, Editors (with proper permission) may change these setting on an individual attachment.

*Partial page display; new setting in the middle of the page:*

**Configure Attachment Security**

Cancel Submit

**Sanitization**

Files uploaded by Editors and Reviewers as part of their work on the submission ("Attachments") may be made available to the Author and other Reviewers. Check the box below and click the 'Submit' button to "sanitize" these files by removing identifying information from the 'File Properties' and 'Track Changes' features of Microsoft Office files, and the 'Properties' of PDF files. PDF annotations (with the exception of dynamic stamps) are also sanitized. Note: any personal identifying information included in the actual text of the file must be removed manually.

If sanitization is enabled, Authors will only have access to the sanitized version of the Attachments. Editors will have access to both the original and sanitized files. Reviewers will have access to the original files unless the checkbox 'Allow other Reviewers access only to Attachments with personal information removed' is selected.

[MIDDLE OF PAGE OMITED]

**Availability**

Select the applicable option(s) below to designate all uploaded Editor/Reviewer Attachments as available to the Author and/or Reviewers by default. The availability of individual files can also be set manually at various access points throughout the system.

A Reviewer always has access to files he or she uploaded, but if a file is marked as "Available to Reviewers" it will also be available to other Reviewers of the same submission.

| | Author | Reviewers |
|---|---|---|
| Designate **Editor**-uploaded files as available by default to: | ☐ | ☐ |
| Designate **Reviewer**-uploaded files as available by default to: | ☐ | ☐ |

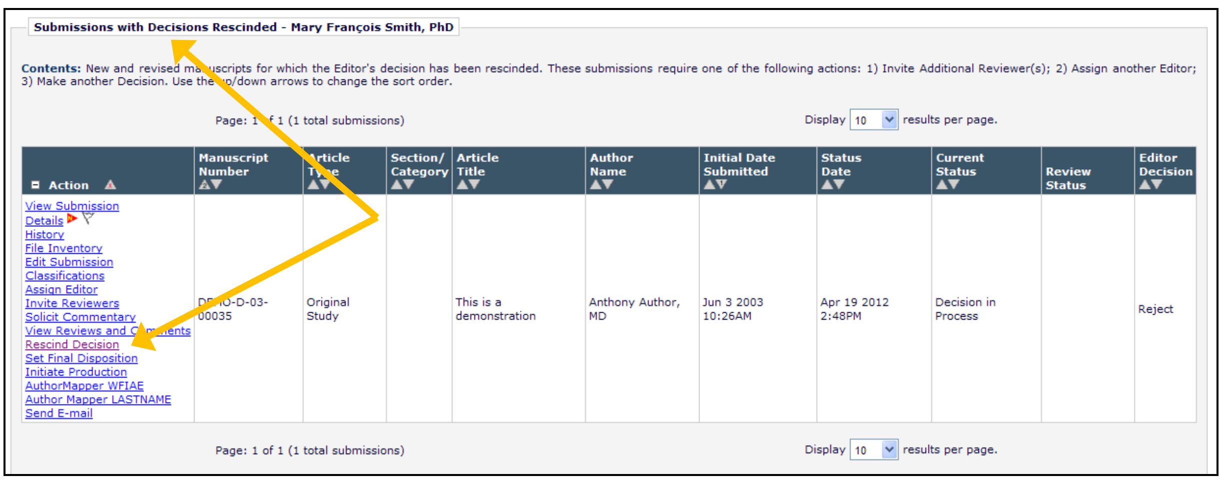
NOTE: These options are not selected up upgrade to v9.2.

## Ability to Rescind Multiple Decisions

In EM v9.1, if an Editor submits a Decision and wishes to change their decision, users may be given permission to 'Rescind Decision', allowing the Editor's assignment to be re-opened so that their decision can be changed. Periodically, users have situations where more than one Editor's decision needs to be rescinded, though EM does not provide a way for users to do this without the intervention of Aries Customer Support. New in EM v9.2, publications are now able to rescind more than one decision in succession, re-opening multiple decisions in the Editor chain one after the other.

As per current functionality, when a Decision has been rescinded, the submission will display in the *Submissions with Rescinded Decisions* folder for Editors with 'Rescind Permission' and 'View All Submissions' permission enabled. New in EM v9.2, the Rescind Decision Action Link is now available in this folder if there is at least one Editor Assignment in the same chain which can be reopened by a Rescind action (i.e. is closed with a decision), AND the currently logged-in Editor is configured with the 'Rescind Decision' Editor RoleManager permission.

In addition, the Search Submissions results page will also contain a Rescind action link for this submission, if the Editor has the correct permissions.



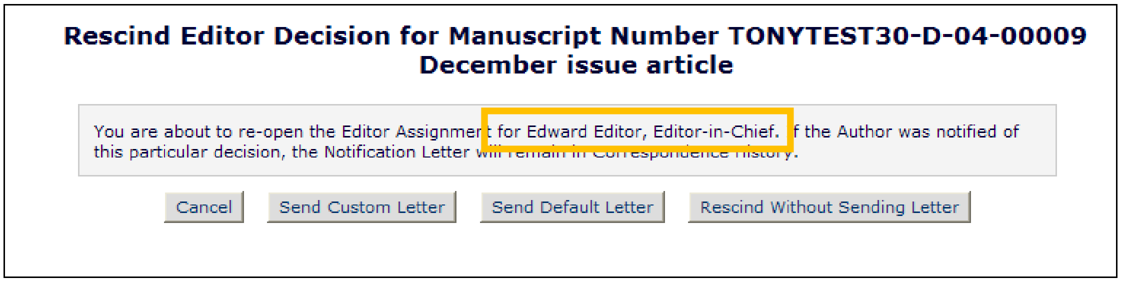

NOTE: A subsequent decision may only be rescinded as long as a submission is found in the *Submissions with Rescinded Decisions* folder and no further action has been taken (additional Reviewers invited, etc.).

NOTE: In order to complete a second Rescind action, any comments or decision terms related to the first rescinded decision are deleted, clearing out all comments and working decision terms.

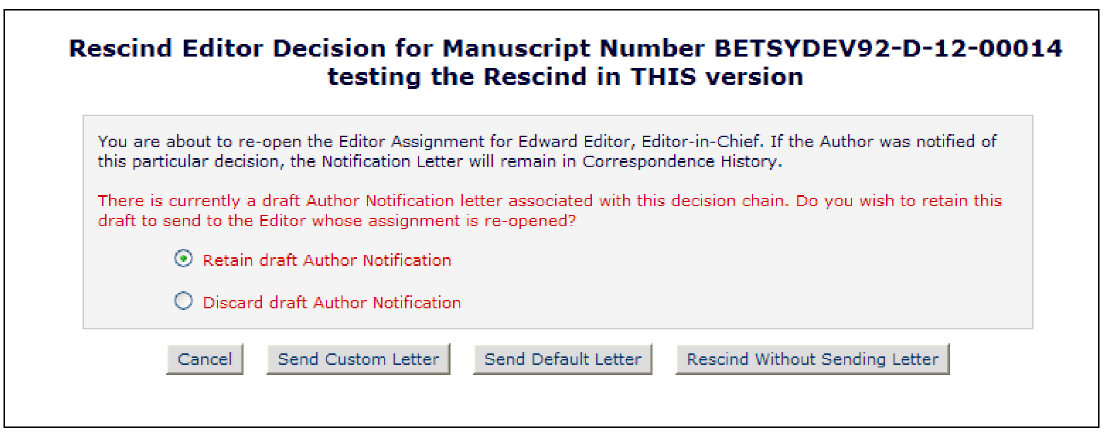
TO CONFIGURE:
No additional configuration is required to use this new feature. Editors with the existing 'Rescind Decision' permission will have the ability to rescind multiple decisions upon upgrade to v9.2.

## Rescind Decision Enhancements

New in EM v9.2, Editors (with proper permission) may rescind multiple decisions in succession to return a submission back down the decision chain. In order to better support multiple Rescind actions, the *Rescind Decision* page now confirms which Editor assignment is being re-opened by the current Rescind action being carried out.




Additionally, if there is a saved draft Decision Letter associated with the current revision, the user performing the Rescind action will be able to pass the draft decision letter back to the Editor whose assignment is being re-opened. This is similar to the existing ability to ‘Send back to [Editor]’ feature available on the *Notify Author* page for Editor’s with Rescind Decision permission.




When a draft letter is passed back down the chain to an Editor, then that Editor, upon clicking their Submit Editor’s Decision and Comments link, will be taken directly to the *Notify Author* page with the draft letter loaded. Per existing functionality, the Editor’s available actions are based on their Author Notification permissions (send the letter, submit their decision with the draft, or discard the letter and submit their own decision).

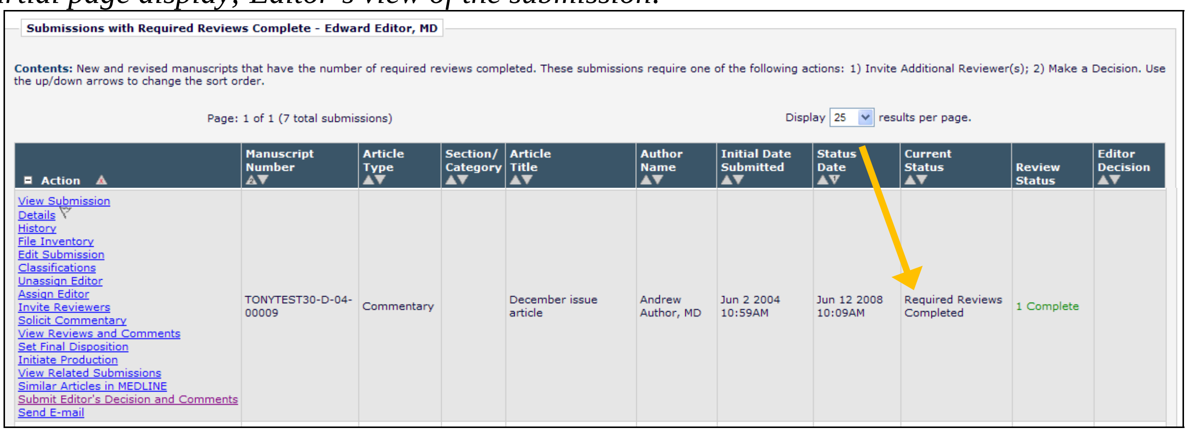
TO CONFIGURE:
No additional configuration is required to use this new feature. Editors with the existing ‘Rescind Decision’ permission will have the rescind decision enhancements available upon upgrade to v9.2.

## Editorial Status to Display for Authors

In EM/PM v9.1, publications may choose to display the current editorial status of a paper to Authors so they may track the current status of a submission. Some publications have statuses configured that may not be appropriate for Authors to see, preventing them from using this feature.

New in EM/PM v9.2, publications may now enter alternate text to display for any or all Editorial Status terms. When alternate text is entered, then the Author will see this status in folders where the Author has visibility to the Editorial Status of a submission. If no alternate text is entered, the Author will see the primary Editorial status term.

*Partial page display; Editor's view of the submission:*



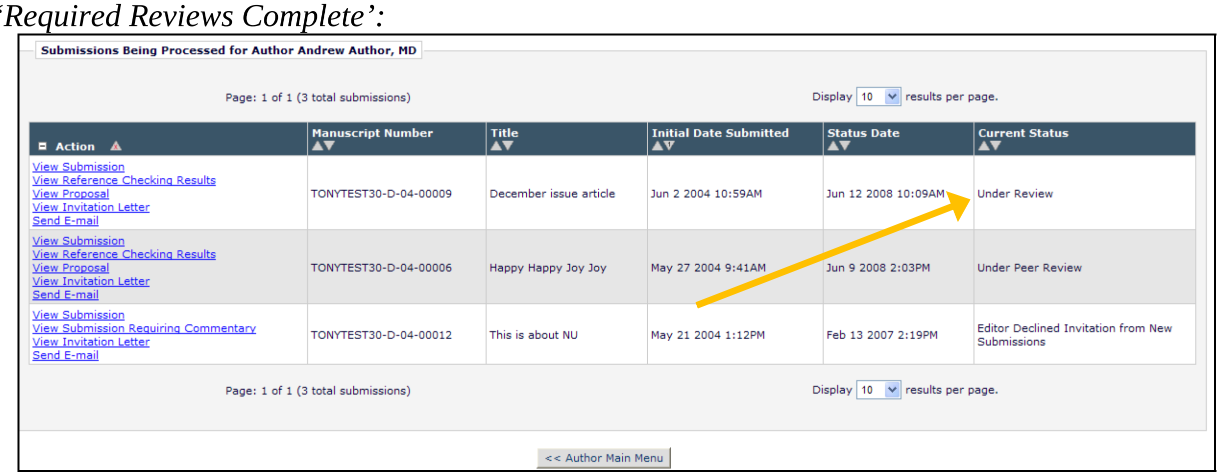
**Submissions with Required Reviews Complete - Edward Editor, MD**

**Contents:** New and revised manuscripts that have the number of required reviews completed. These submissions require one of the following actions: 1) Invite Additional Reviewer(s); 2) Make a Decision. Use the up/down arrows to change the sort order.

Page: 1 of 1 (7 total submissions) Display 25 results per page.

| Action | Manuscript Number | Article Type | Section/ Category | Article Title | Author Name | Initial Date Submitted | Status Date | Current Status | Review Status | Editor Decision |
|---|---|---|---|---|---|---|---|---|---|---|
| View Submission<br>Details<br>History<br>File Inventory<br>Edit Submission<br>Classifications<br>Unassign Editor<br>Assign Editor<br>Invite Reviewers<br>Solicit Commentary<br>View Reviews and Comments<br>Set Final Disposition<br>Initiate Production<br>View Related Submissions<br>Similar Articles in MEDLINE<br>Submit Editor's Decision and Comments<br>Send E-mail | TONYTEST30-D-04-00009 | Commentary | | December issue article | Andrew Author, MD | Jun 2 2004 10:59AM | Jun 12 2008 10:09AM | Required Reviews Completed | 1 Complete | |

*Author's view of the submission, where 'Under Review' has been entered as the alternate text to 'Required Reviews Complete':*



**Submissions Being Processed for Author Andrew Author, MD**

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

| Action | Manuscript Number | Title | Initial Date Submitted | Status Date | Current Status |
|---|---|---|---|---|---|
| View Submission<br>View Reference Checking Results<br>View Proposal<br>View Invitation Letter<br>Send E-mail | TONYTEST30-D-04-00009 | December issue article | Jun 2 2004 10:59AM | Jun 12 2008 10:09AM | Under Review |
| View Submission<br>View Reference Checking Results<br>View Proposal<br>View Invitation Letter<br>Send E-mail | TONYTEST30-D-04-00006 | Happy Happy Joy Joy | May 27 2004 9:41AM | Jun 9 2008 2:03PM | Under Peer Review |
| View Submission<br>View Submission Requiring Commentary<br>View Invitation Letter<br>Send E-mail | TONYTEST30-D-04-00012 | This is about NU | May 21 2004 1:12PM | Feb 13 2007 2:19PM | Editor Declined Invitation from New Submissions |

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

<< Author Main Menu

Publications may also add alternative text for Decision Terms, allowing Publications to have more specific Decision terms internally, but display more general categories to Authors.

TO CONFIGURE:
To enter alternate text to display to Authors for a specific document status, go to PolicyManager, Status Policies, Edit Document Statuses, and click Edit next to an existing status. On the *Add/Edit Document Status* page, enter the desired text in the 'Alternative Text for Authors' field.

*Sample page:*

## Add/Edit Document Status

The Editorial Document Status is the primary term used by the publication to track progress through the peer-review workflow. If you give Authors permission to view the Current Status, you may define an optional Alternative Text to display to the Author or leave this blank to display the main Editorial Document Status.

Editorial Document Status: Required Reviews Comple

Alternative Text for Authors:

New Status Role Family: EDITOR

Cancel Submit

The ActionManager page continues to display the primary status term, but alternate terms are also displayed for each primary term, where defined, for ease of reference.

*Sample* ActionManager*; section of page displayed:*

**Reviewer Assigned**

| Event | New Document Status | Warnings | Alternative Text for Authors |
|---|---|---|---|
| Request Unregistered Reviewer | No Change | | |
| Reviewer Invited | Reviewer invited | | |
| Reviewer Assigned (Not Invited) | Under Peer Review | | |
| Reviewer Agree | Under Peer Review | | |
| Reviewer Decline | No Change | | |
| Review Due Date Changed | No Change | | |
| Un-invite Reviewers Before Agreeing to Review | No Change | | |
| Un-assign Reviewers After Agreeing to Review | No Change | | |
| Re-open Review | No Change | | |
| Promote Alternate Reviewers | Reviewer invited | | |
| Review Assignment Completed | No Change | | |
| Required Reviews Complete | Required Reviews Completed | | Under Review |

## Transfer Submissions to non-People Sharing Publications

In EM/PM v9.1, publications in a People Sharing Group (also known as IJRS) may be configured to transfer submissions between publications using the Transfer Submissions feature. Some business publishers with many publications using EM have expressed interest in the ability to transfer submissions between publications without having to be in a People Sharing Group.

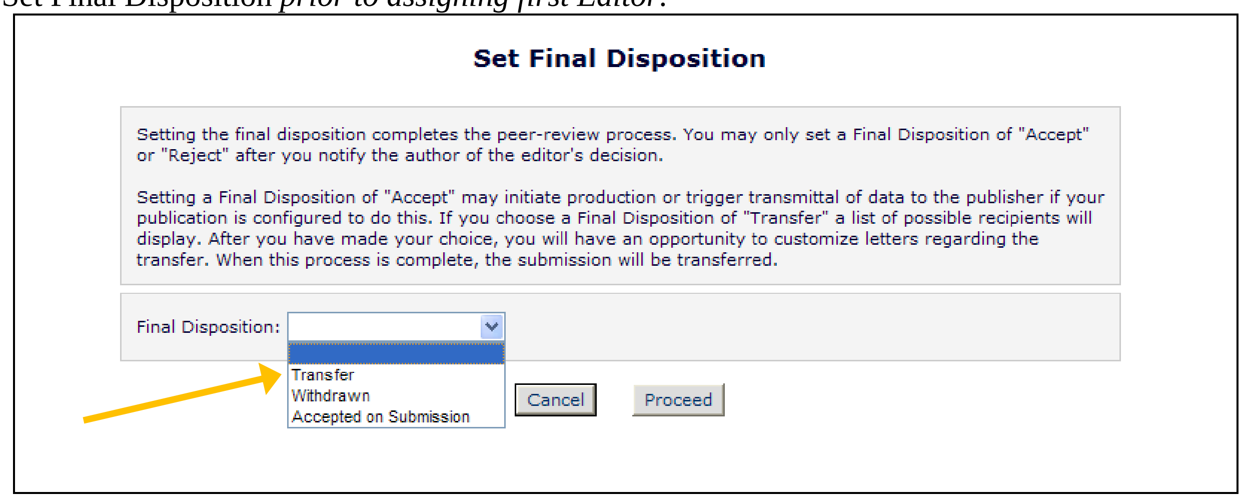
New in EM/PM v9.2, publications belonging to the same Business Publisher may now configure sites to use the Transfer Submissions feature.  Publications within the same Business Publisher wishing to use the Transfer Submission feature must first enable the feature in AdminManager on the ‘Configure Cross-Publication Submission Transfer’ page (this page was only available to IJRS-linked publications in v9.1).  Once this feature is enabled, Editors can transfer a submission by setting the Final Disposition to “Transfer” and selecting a recipient publication from a list of publications in the publishing group that also have the transfer feature enabled.

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

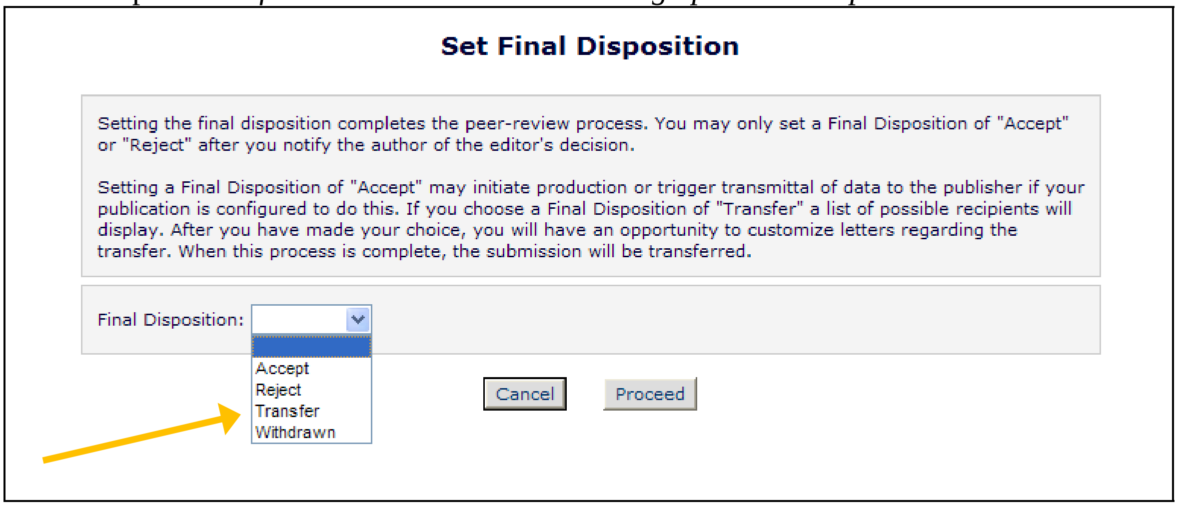
NOTE:  If a submission is transferred before it is assigned to an Editor (before a Manuscript Number was assigned), the source files will be deleted from the sending publication upon successfully transferring the submission.  This is done because the submission has not been through any editorial process,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

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

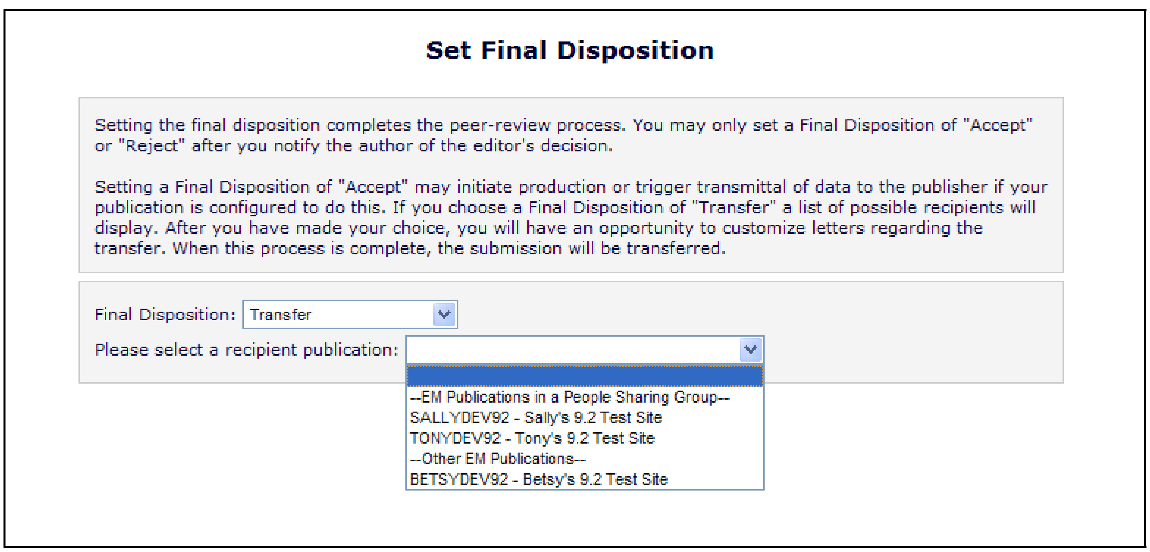
Set Final Disposition *prior to assigning first Editor:*



Set Final Disposition *after submission has been through peer review process:*



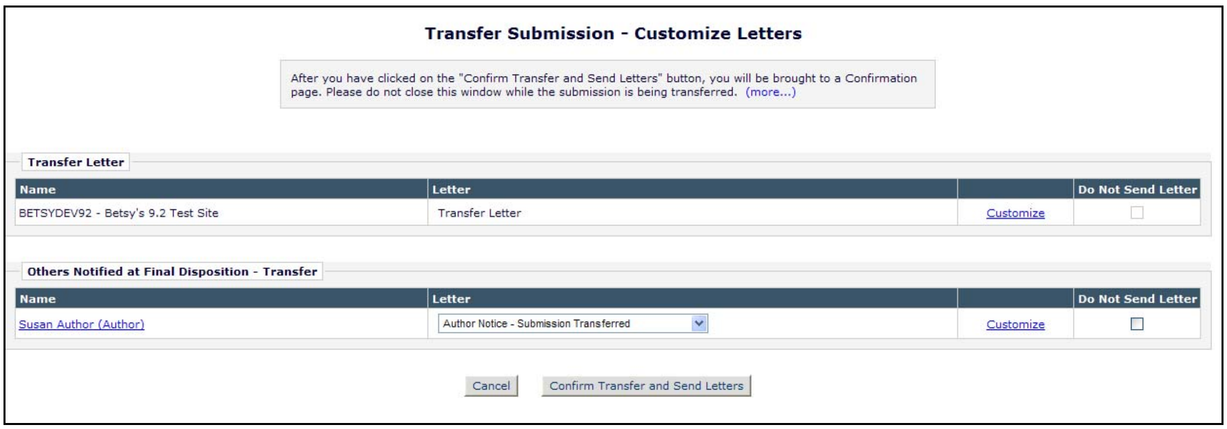

When the 'Transfer' option is selected, the page refreshes to display a drop-down with all publications in the same Business Publisher or People Sharing group that have the 'Transfer' feature enabled. The Editor must choose a publication from the list before he can proceed to customize letters. The list displays with any People Sharing publications first (under a label 'EM Publications in People Sharing Group'), followed by other non-people sharing publications (under a label 'Other EM Publications').




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

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

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



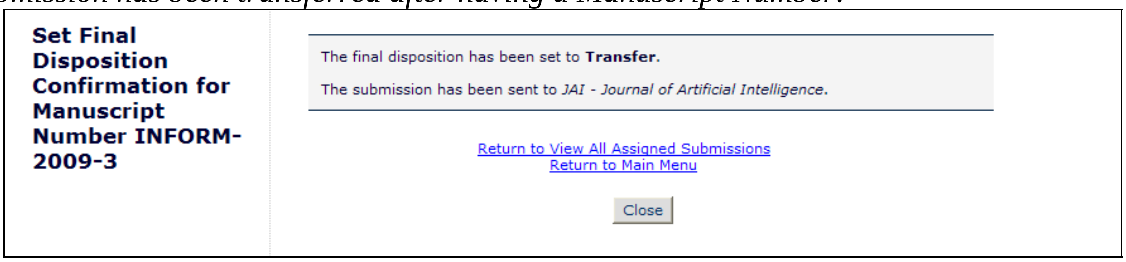

After the Editor customizes letters and clicks the ‘Confirm Transfer and Send Letters’ button, the recipient publication’s people records are checked to determine if the Corresponding Author has a record on the receiving publication. A check is done for an exact match on First Name + Last Name + E-mail Address (if the Corresponding Author record has more than 1 e-mail address, these are parsed and each e-mail/first/last name combination is checked).

- If an exact match is found, the submission is transferred to the recipient publication and the Editor is brought to a confirmation page.
- If more than one match is found, the Editor sees the following warning:


- If an exact match is not found, the Corresponding Author information is copied into the new publication as if the Author is self-registering for the first time (letters configured in the receiving publication for the ‘New User Registers’ event are sent). The submission is then transferred to the recipient publication and the Editor is brought to a confirmation page.

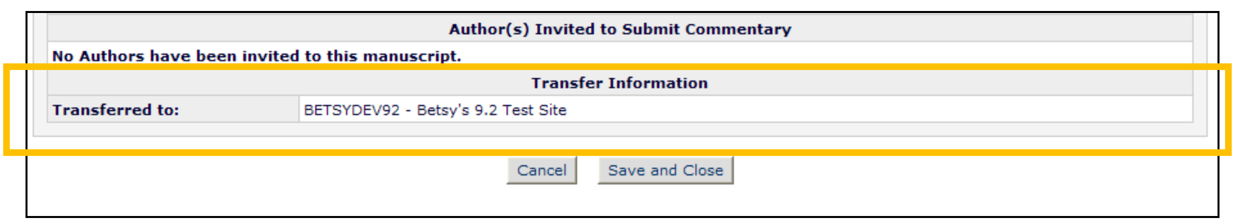
*A submission has been transferred before having a Manuscript Number:*


*A submission has been transferred after having a Manuscript Number:*



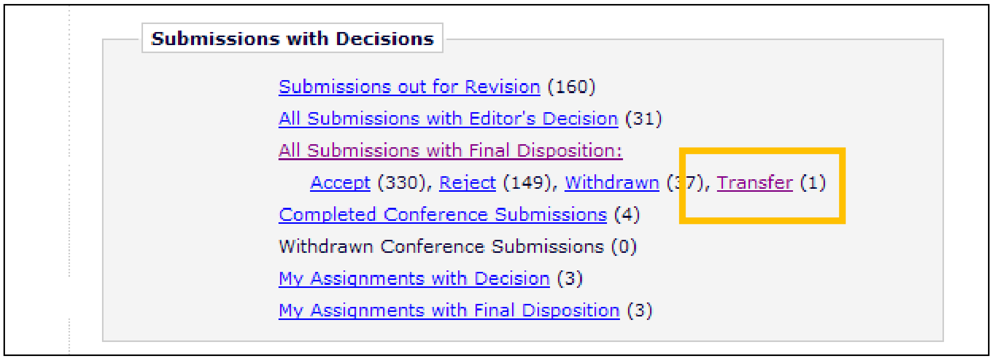

If there are any errors during Transfer, the sending publication will receive a notice at the e-mail address configured on their *Configure Cross-Publication Submission Transfer* page (see below for information on configuring this page).

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



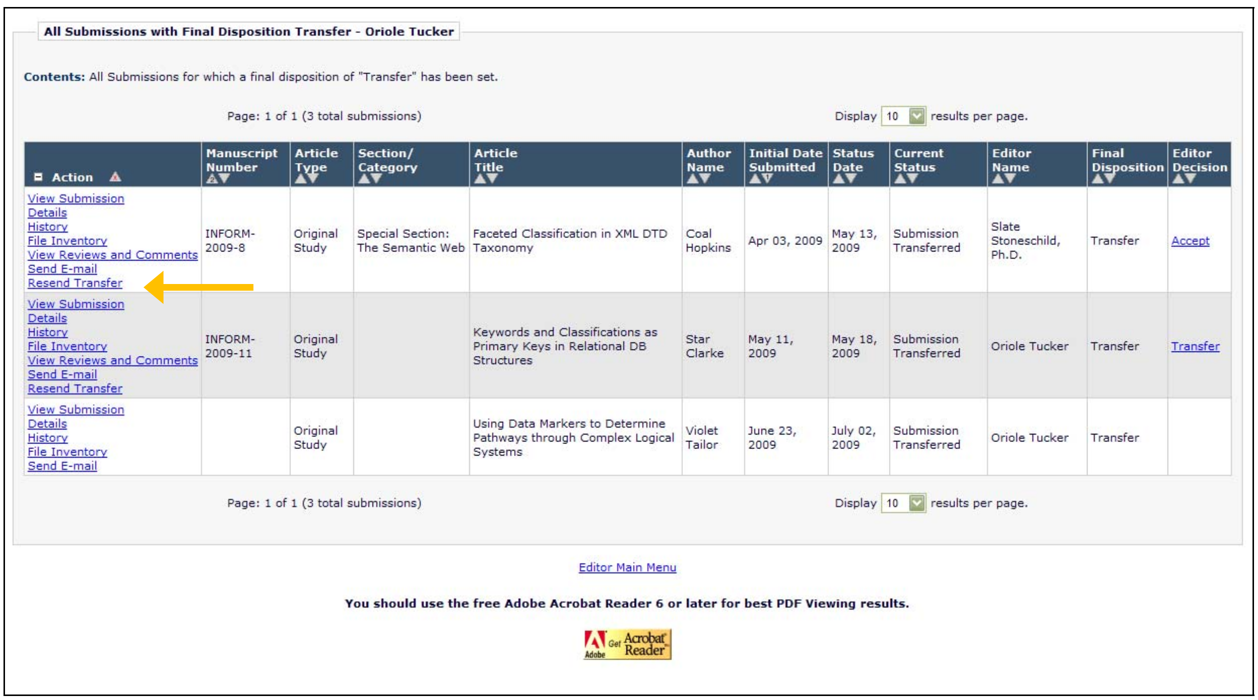

The 'Transfer Information' section can be added to custom *Details* as well, and will only display if the submission has been transferred. If there is no information, the section is suppressed.

A new folder is available on the Editor Main Menu in the 'Submissions with Decisions' section called 'All Submissions with Final Disposition: Transfer'. This folder displays all submissions where the Final Disposition has been set to 'Transfer' but is suppressed if there are none. When the Final Disposition of a submission is set to "Transfer", the status is changed to 'Submission Transferred'.




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

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


All Submissions with Final Disposition Transfer - Oriole Tucker

**Contents:** All Submissions for which a final disposition of "Transfer" has been set.

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

| Action | Manuscript Number | Article Type | Section/ Category | Article Title | Author Name | Initial Date Submitted | Status Date | Current Status | Editor Name | Final Disposition | Editor Decision |
|---|---|---|---|---|---|---|---|---|---|---|---|
| View Submission<br>Details<br>History<br>File Inventory<br>View Reviews and Comments<br>Send E-mail<br>Resend Transfer | INFORM-2009-8 | Original Study | Special Section: The Semantic Web | Faceted Classification in XML DTD Taxonomy | Coal Hopkins | Apr 03, 2009 | May 13, 2009 | Submission Transferred | Slate Stoneschild, Ph.D. | Transfer | Accept |
| View Submission<br>Details<br>History<br>File Inventory<br>View Reviews and Comments<br>Send E-mail<br>Resend Transfer | INFORM-2009-11 | Original Study | | Keywords and Classifications as Primary Keys in Relational DB Structures | Star Clarke | May 11, 2009 | May 18, 2009 | Submission Transferred | Oriole Tucker | Transfer | Transfer |
| View Submission<br>Details<br>History<br>File Inventory<br>Send E-mail | | Original Study | | Using Data Markers to Determine Pathways through Complex Logical Systems | Violet Tailor | June 23, 2009 | July 02, 2009 | Submission Transferred | Oriole Tucker | Transfer | |

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

Editor Main Menu

**You should use the free Adobe Acrobat Reader 6 or later for best PDF Viewing results.**

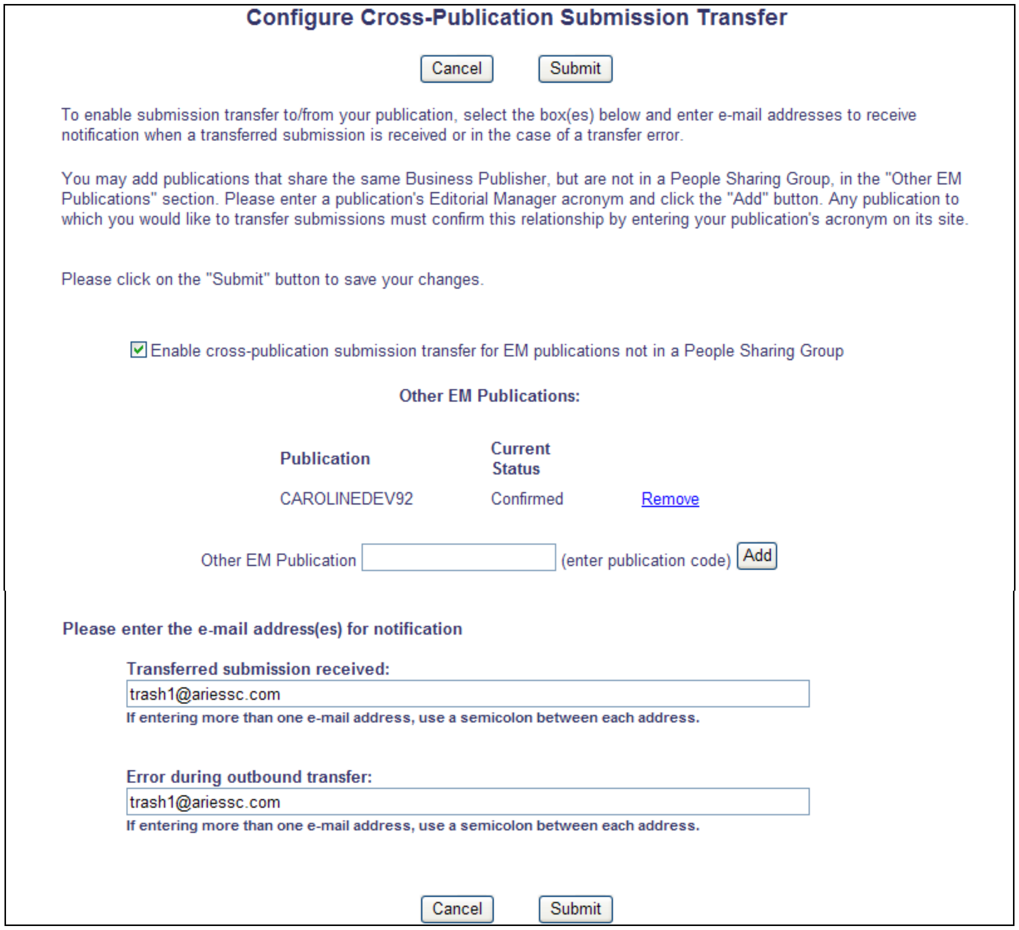
When the user clicks the link, they are asked to confirm that they would like to resend the submission files and metadata.  Upon clicking 'OK', the Transfer to the original recipient publication is retried, including the Transfer Letter and the notification of transferred submission received (sent to the e-mail configured on the *Configure Cross-Publication Submission Transfer* page; see 'To Configure' section for more information).  The "Final Disposition – Transfer" event is not triggered, however, and none of its associated letters are sent (since they were already sent once).

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

TO CONFIGURE:
All publications will now see the Configure Cross-Publication Submission Transfer link in AdminManager, just after Share People and before View File Transfer Statistics.


To enable the submission transfer feature to/from your publication, select/check the box labeled ‘Enable cross-publication submission transfer for EM publications not in a People Sharing Group’.  Enter the publication code of other publications with which you wish to transfer submissions and click the ‘Add’ button.  In the bottom portion of the page, enter e-mail addresses to receive notification when a transferred submission is received by your publication (top line), and e-mail addresses to receive notifications in the event of an outbound transfer error (bottom line).  Multiple e-mail addresses may be entered for each option, however there must be at least one valid e-mail address for each in order to enable this feature.

NOTE:  Both publications (sending and receiving) must have the ‘Enable cross-publication submission transfer for EM publications not in a People Sharing Group’ box selected/checked in order to use the feature.


Configure Cross-Publication Submission Transfer

Cancel Submit

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

You may add publications that share the same Business Publisher, but are not in a People Sharing Group, in the "Other EM Publications" section. Please enter a publication's Editorial Manager acronym and click the "Add" button. Any publication to which you would like to transfer submissions must confirm this relationship by entering your publication's acronym on its site.

Please click on the "Submit" button to save your changes.

☑ Enable cross-publication submission transfer for EM publications not in a People Sharing Group

Other EM Publications:

| Publication | Current Status | |
| --- | --- | --- |
| CAROLINEDEV92 | Confirmed | Remove |

Other EM Publication (enter publication code) Add

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

Transferred submission received:

trash1@ariessc.com

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

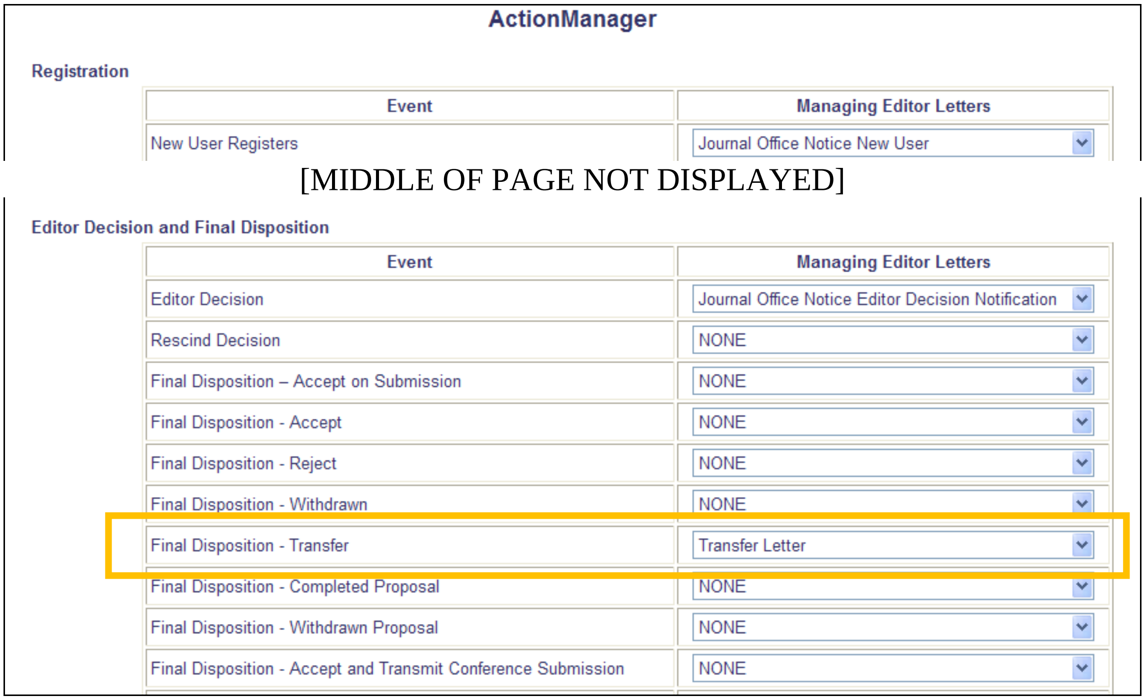
Error during outbound transfer:

trash1@ariessc.com

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

Cancel Submit

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



## ActionManager

**Registration**

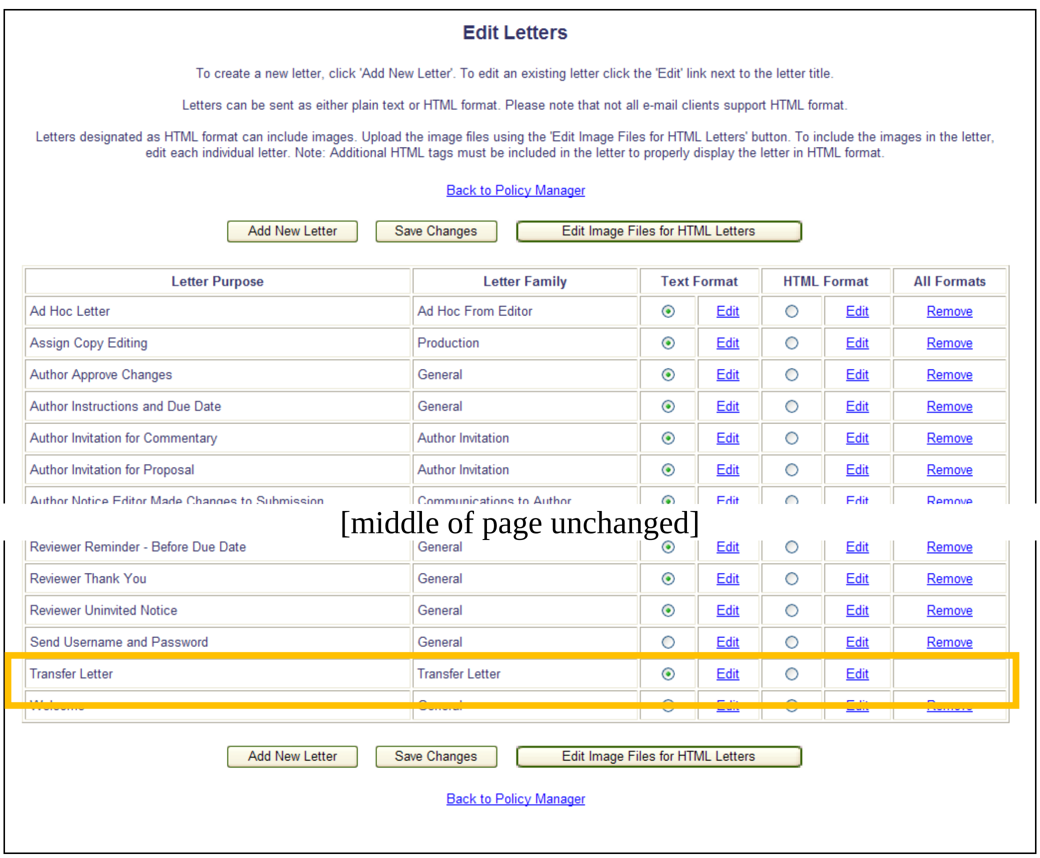
| Event | Managing Editor Letters |
|---|---|
| New User Registers | Journal Office Notice New User |

[MIDDLE OF PAGE NOT DISPLAYED]

**Editor Decision and Final Disposition**

| Event | Managing Editor Letters |
|---|---|
| Editor Decision | Journal Office Notice Editor Decision Notification |
| Rescind Decision | NONE |
| Final Disposition – Accept on Submission | NONE |
| Final Disposition - Accept | NONE |
| Final Disposition - Reject | NONE |
| Final Disposition - Withdrawn | NONE |
| Final Disposition - Transfer | Transfer Letter |
| Final Disposition - Completed Proposal | NONE |
| Final Disposition - Withdrawn Proposal | NONE |
| Final Disposition - Accept and Transmit Conference Submission | NONE |

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



## Edit Letters

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

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

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

Back to Policy Manager

Add New Letter | Save Changes | Edit Image Files for HTML Letters

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

[middle of page unchanged]

| Letter Purpose | Letter Family | Text Format | | HTML Format | | All Formats |
|---|---|---|---|---|---|---|
| Reviewer Reminder - Before Due Date | General | ⦿ | Edit | ○ | Edit | Remove |
| Reviewer Thank You | General | ⦿ | Edit | ○ | Edit | Remove |
| Reviewer Uninvited Notice | General | ⦿ | Edit | ○ | Edit | Remove |
| Send Username and Password | General | ○ | Edit | ○ | Edit | Remove |
| Transfer Letter | Transfer Letter | ⦿ | Edit | ○ | Edit | |
| Welcome | General | ⦿ | Edit | ○ | Edit | Remove |

Add New Letter | Save Changes | Edit Image Files for HTML Letters

Back to Policy Manager

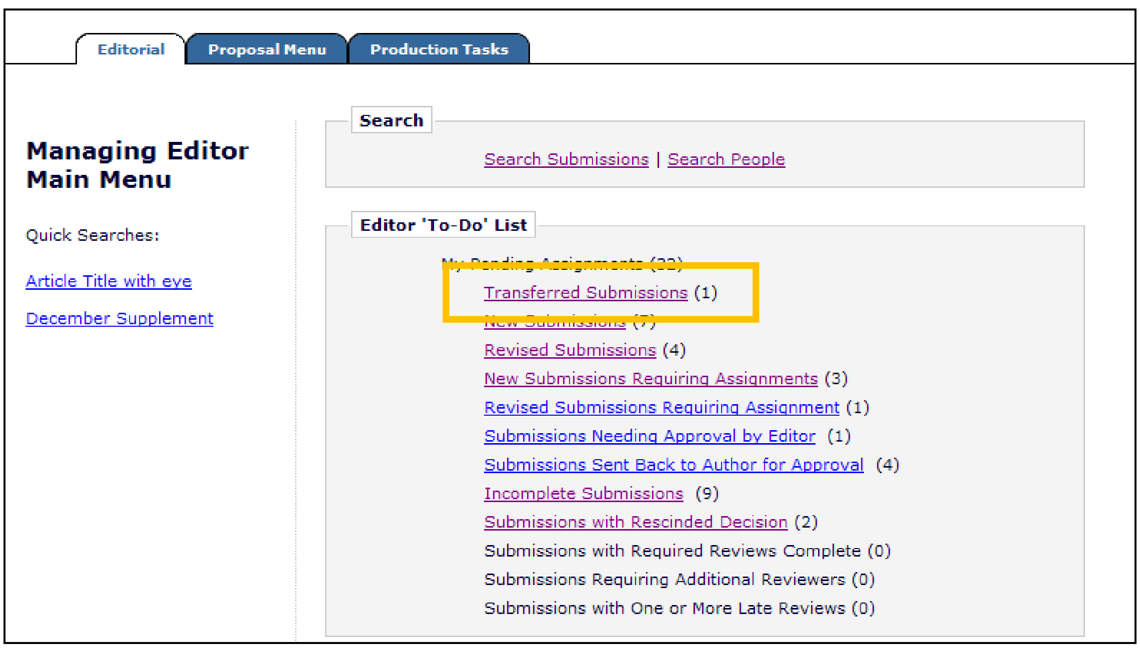
When the Final Disposition of a submission is set to "Transfer", the status is changed to 'Submission Transferred'.  The Status Term may be edited on the 'Edit Document Status Text' page in PolicyManager but may not be removed.

## Receive Transferred Submissions from non-People Sharing Publications

In EM/PM v9.1, publications in a People Sharing Group (also known as IJRS) may be configured to transfer submissions between publications using the Transfer Submissions feature. Some business publishers with many publications using EM have expressed interest in the ability to transfer submissions between publications without having to be in a People Sharing Group.

New in EM/PM v9.2, publications belonging to the same Business Publisher may now configure sites to use the Transfer Submissions feature. Publications within the same Business Publisher wishing to use the Transfer Submission feature first need to enable the feature in AdminManager on the 'Configure Cross-Publication Submission Transfer' page (this page was only available to IJRS-linked publications in v9.1). Once this feature is enabled, publications will be able to receive submissions transferred from other publications within the same Business Publisher that also have the transfer feature enabled.

When a submission is transferred into a publication, it is received in a new folder called "Transferred Submissions". This folder will appear on the Editorial Main Menu for any Editor role with the 'Receive New Transferred Submissions in 'Transferred Submissions' Folder' permission enabled.




When a transfer is successful, a letter is sent to the e-mail address configured for the recipient publication on their *Configure Cross-Publication Submission Transfer* page (see configuration information below). This letter is also stored in the History of the submission in the recipient publication.

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

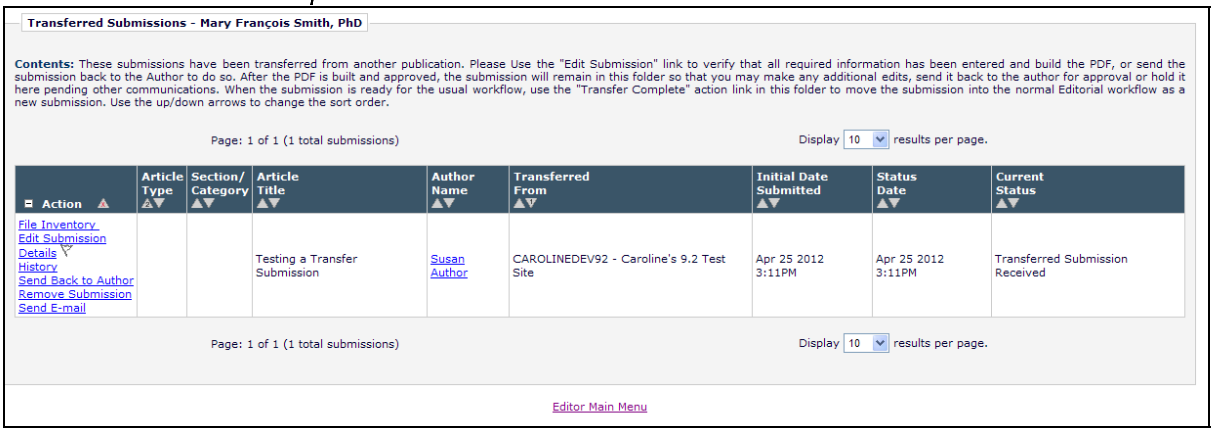
1. System fields that are not configurable, such as Article Title, Author Comments to Journal, etc. will be automatically populated with the associated data from the original publication. If the recipient publication imposes any restrictions on these fields (such as character limitations), the full information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

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

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

NOTE: Submissions may be transferred from another publication after the submission has gone through that publication's editorial process and a decision has been made. These submissions will still be placed in the recipient publication's 'Transferred Submissions' folder and will go through the recipient publication's editorial process.

Transferred Submissions *folder:*



**Transferred Submissions - Mary François Smith, PhD**

**Contents:** These submissions have been transferred from another publication. Please Use the "Edit Submission" link to verify that all required information has been entered and build the PDF, or send the submission back to the Author to do so. After the PDF is built and approved, the submission will remain in this folder so that you may make any additional edits, send it back to the author for approval or hold it here pending other communications. When the submission is ready for the usual workflow, use the "Transfer Complete" action link in this folder to move the submission into the normal Editorial workflow as a new submission. Use the up/down arrows to change the sort order.

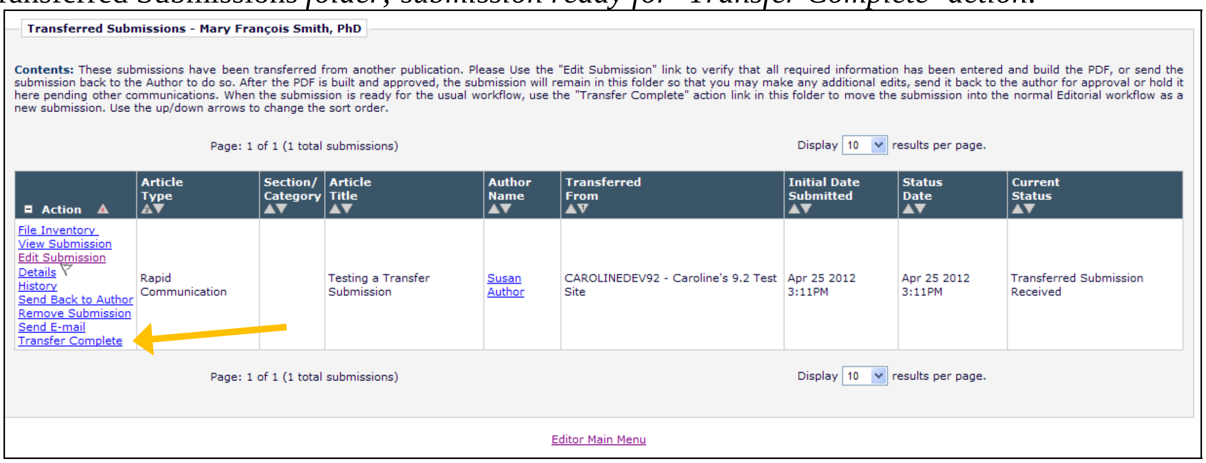
Page: 1 of 1 (1 total submissions) Display 10 results per page.

| Action | Article Type | Section/ Category | Article Title | Author Name | Transferred From | Initial Date Submitted | Status Date | Current Status |
|---|---|---|---|---|---|---|---|---|
| File Inventory<br>Edit Submission<br>Details<br>History<br>Send Back to Author<br>Remove Submission<br>Send E-mail | | | Testing a Transfer Submission | Susan Author | CAROLINEDEV92 - Caroline's 9.2 Test Site | Apr 25 2012 3:11PM | Apr 25 2012 3:11PM | Transferred Submission Received |

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

Editor Main Menu

Transferred Submissions *folder; submission ready for 'Transfer Complete' action:*



**Transferred Submissions - Mary François Smith, PhD**

**Contents:** These submissions have been transferred from another publication. Please Use the "Edit Submission" link to verify that all required information has been entered and build the PDF, or send the submission back to the Author to do so. After the PDF is built and approved, the submission will remain in this folder so that you may make any additional edits, send it back to the author for approval or hold it here pending other communications. When the submission is ready for the usual workflow, use the "Transfer Complete" action link in this folder to move the submission into the normal Editorial workflow as a new submission. Use the up/down arrows to change the sort order.

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

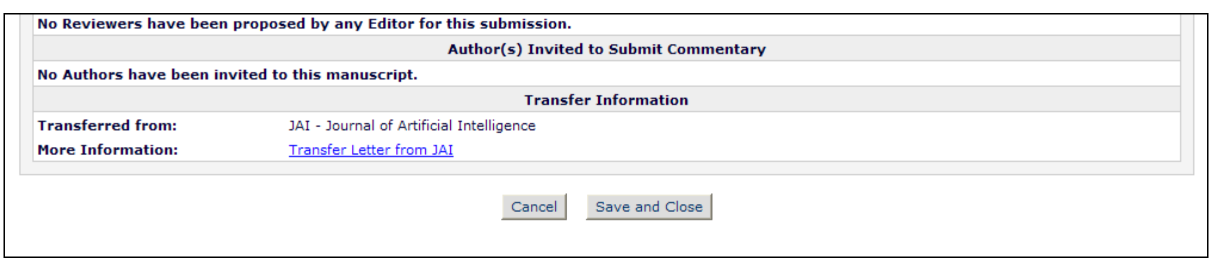
| Action | Article Type | Section/ Category | Article Title | Author Name | Transferred From | Initial Date Submitted | Status Date | Current Status |
|---|---|---|---|---|---|---|---|---|
| File Inventory<br>View Submission<br>Edit Submission<br>Details<br>History<br>Send Back to Author<br>Remove Submission<br>Send E-mail<br>Transfer Complete | Rapid Communication | | Testing a Transfer Submission | Susan Author | CAROLINEDEV92 - Caroline's 9.2 Test Site | Apr 25 2012 3:11PM | Apr 25 2012 3:11PM | Transferred Submission Received |

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

Editor Main Menu

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

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



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

**Author(s) Invited to Submit Commentary**

**No Authors have been invited to this manuscript.**

**Transfer Information**

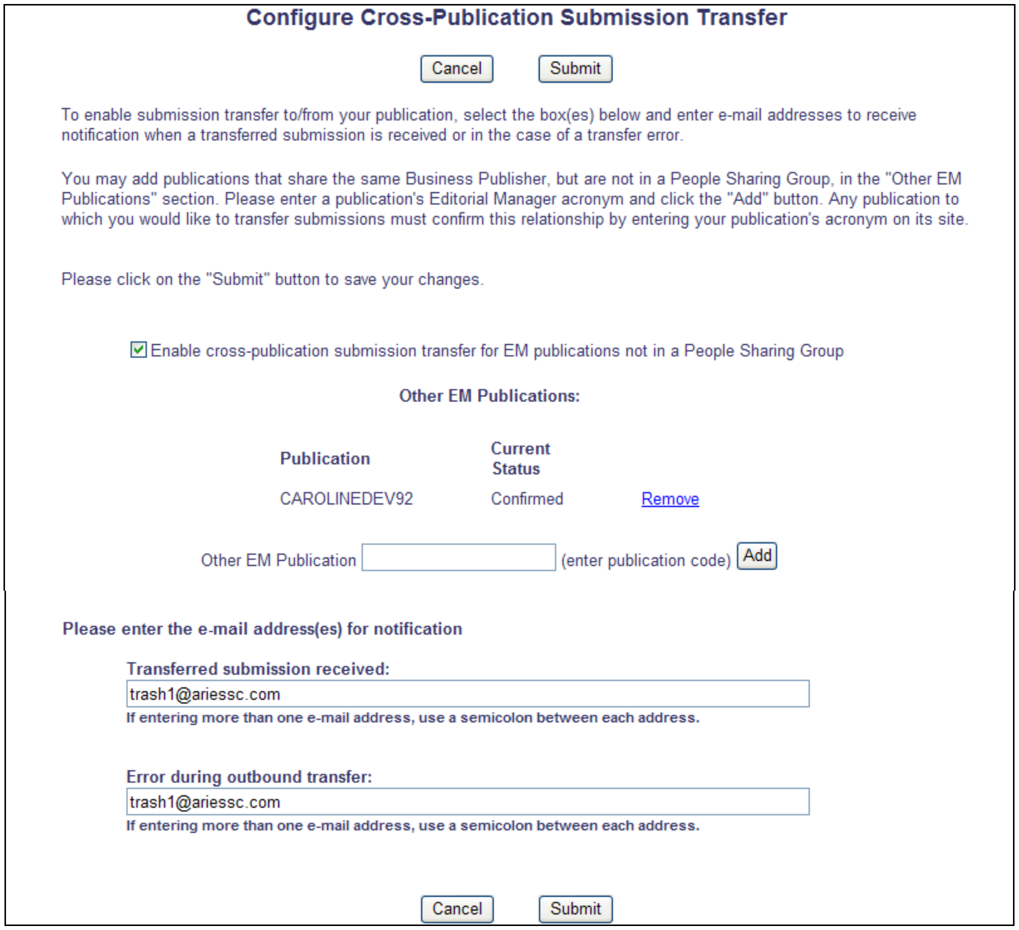
| | |
|---|---|
| **Transferred from:** | JAI - Journal of Artificial Intelligence |
| **More Information:** | Transfer Letter from JAI |

Cancel | Save and Close

TO CONFIGURE:
All publications will now see the Configure Cross-Publication Submission Transfer link in AdminManager, just after Share People and before View File Transfer Statistics.


To enable the submission transfer feature to/from your publication, select/check the box labeled 'Enable cross-publication submission transfer for EM publications not in a People Sharing Group'. Enter the publication code of other publications with which you wish to transfer submissions and click the 'Add' button. In the bottom portion of the page, enter e-mail addresses to receive notification when a transferred submission is received by your publication (top line), and e-mail addresses to receive notifications in the event of an outbound transfer error (bottom line). Multiple e-mail addresses may be entered for each option, however there must be at least one valid e-mail address for each in order to enable this feature.

NOTE: Both publications (sending and receiving) must have the 'Enable cross-publication submission transfer for EM publications not in a People Sharing Group' box selected/checked in order to use the feature.



Configure Cross-Publication Submission Transfer

Cancel Submit

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

You may add publications that share the same Business Publisher, but are not in a People Sharing Group, in the "Other EM Publications" section. Please enter a publication's Editorial Manager acronym and click the "Add" button. Any publication to which you would like to transfer submissions must confirm this relationship by entering your publication's acronym on its site.

Please click on the "Submit" button to save your changes.

☑ Enable cross-publication submission transfer for EM publications not in a People Sharing Group

**Other EM Publications:**

| Publication | Current Status | |
|---|---|---|
| CAROLINEDEV92 | Confirmed | Remove |

Other EM Publication (enter publication code) Add

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

**Transferred submission received:**

trash1@ariessc.com

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

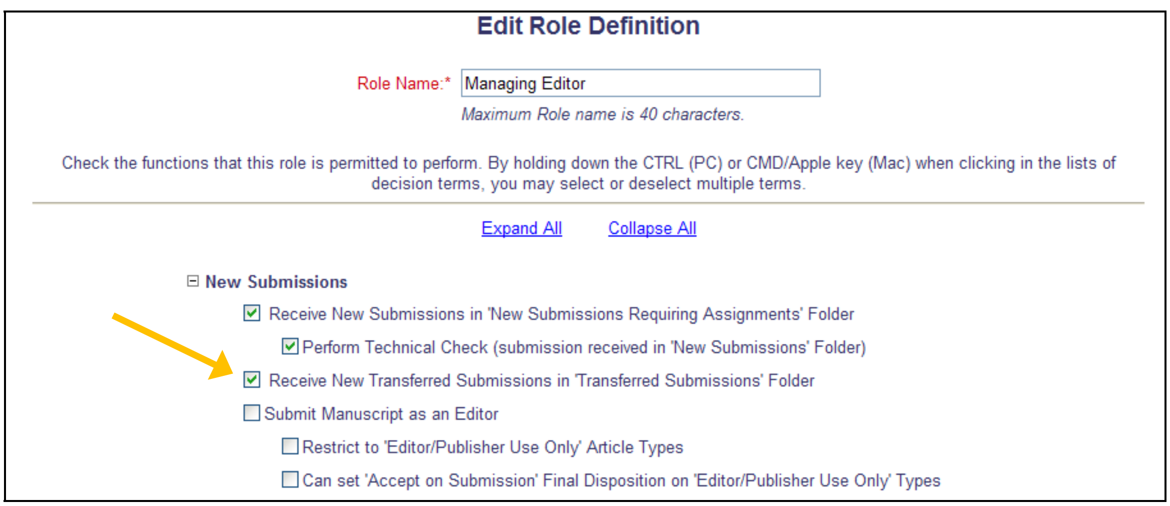
**Error during outbound transfer:**

trash1@ariessc.com

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

Cancel Submit

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



Edit Role Definition

Role Name:* Managing Editor

*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**

☑ Receive New Submissions in 'New Submissions Requiring Assignments' Folder

☑ Perform Technical Check (submission received in 'New Submissions' Folder)

☑ Receive New Transferred Submissions in 'Transferred Submissions' Folder

☐ Submit Manuscript as an Editor

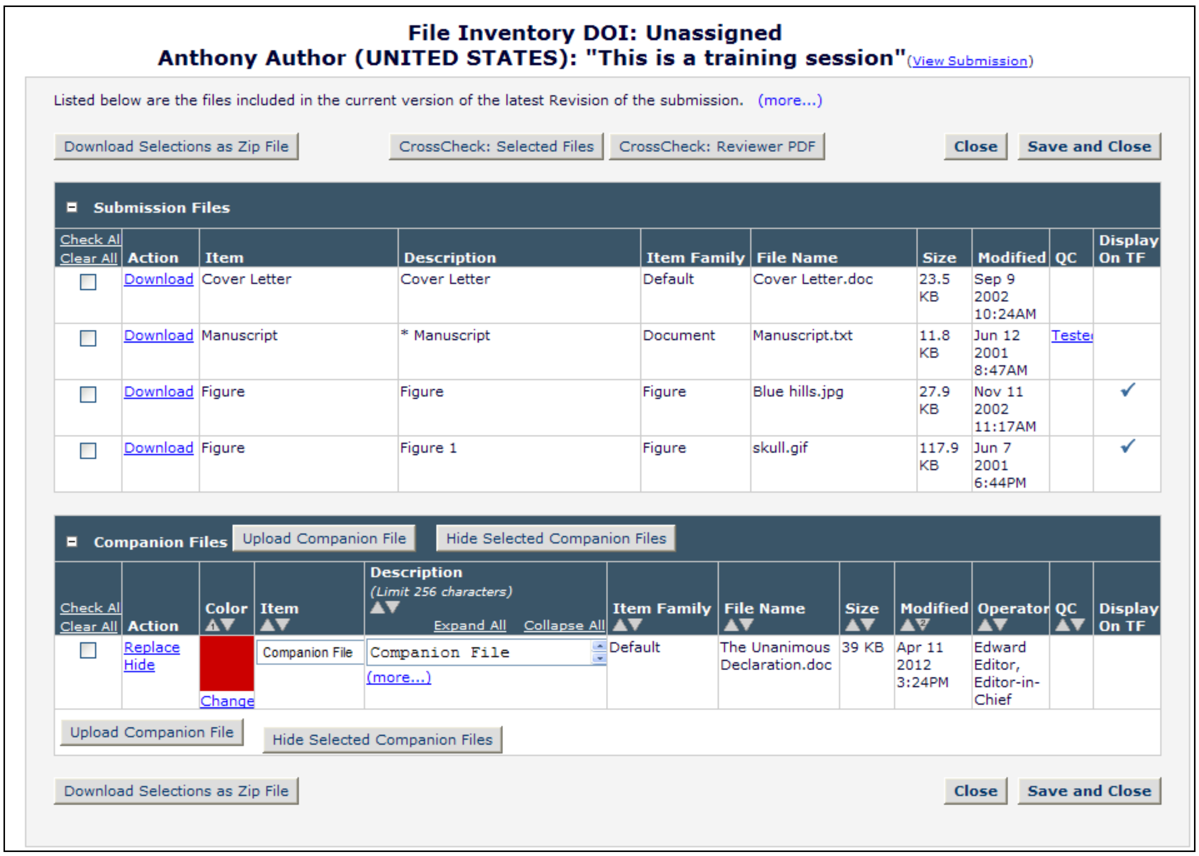
☐ Restrict to 'Editor/Publisher Use Only' Article Types

☐ Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types

## File Inventory

New in EM/PM 9.2, the File Inventory page has been updated with a cleaner look.  The functions are still the same, but the page has been reworked.  Some enhancements include:

- The View Submission link is now displayed by the Title at the top of the page
- The ‘Download Zip File’ buttons are now called ‘Download Selections as Zip File’.  The buttons still behave the same; selected files will be created into a Zip file for download.
- Files are displayed in expandable/collapsible tables, allowing the user to condense sections of files (Submission Files, Companion Files).  This allows users to close sections of files they are not currently working with, providing more visibility of the files with which they are working.
- The Color Code and QC Results columns are now hidden if the publication is not configured to use the applicable feature(s)



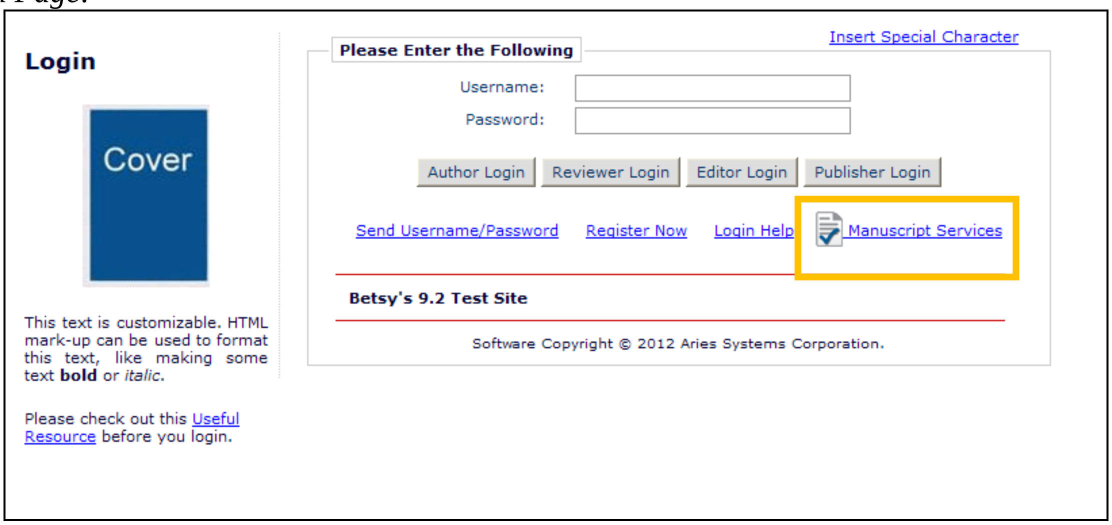

TO CONFIGURE:
No configuration required.  The new File Inventory layout is available for all submissions on upgrade to v9.2.

## Manuscript Services Link

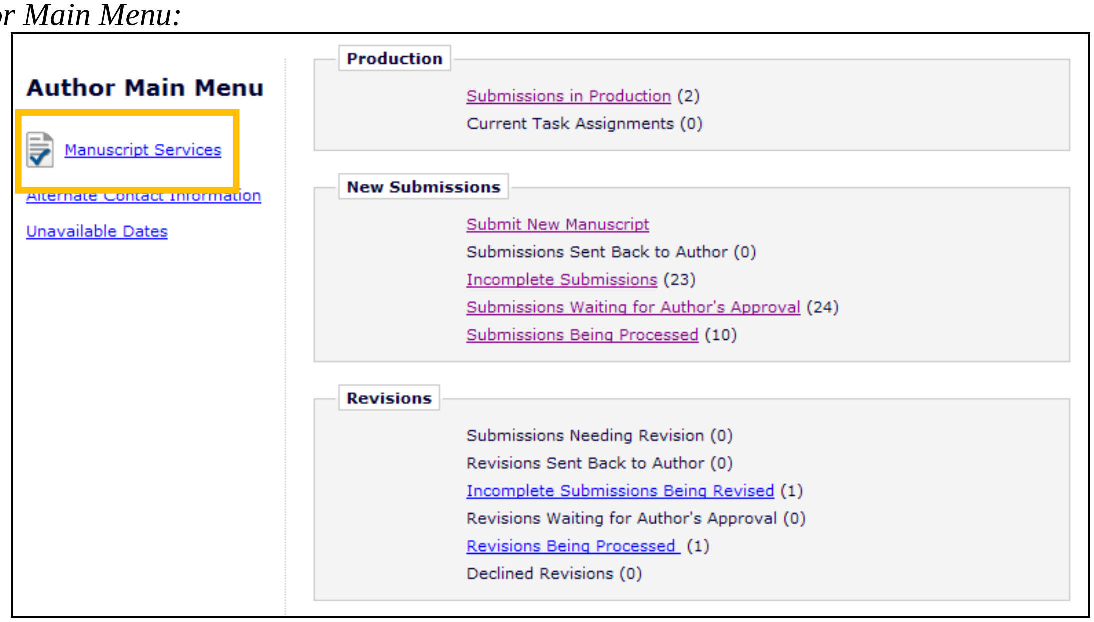
Authors may occasionally require assistance to ensure that their manuscripts are written according to standard rules of grammar, and do not contain typographical errors, prior to submitting to a publication. There are a variety of businesses that offer manuscript services to Authors, such as language clean up and proofreading. New in EM/PM v9.2, Publications may configure their site to display a new Manuscript Services link to Authors. This link leads to an Aries' maintained listing of available manuscript services offered by third party vendors.

When this new feature is configured, Authors will see a new Manuscript Services link and icon in the following places:

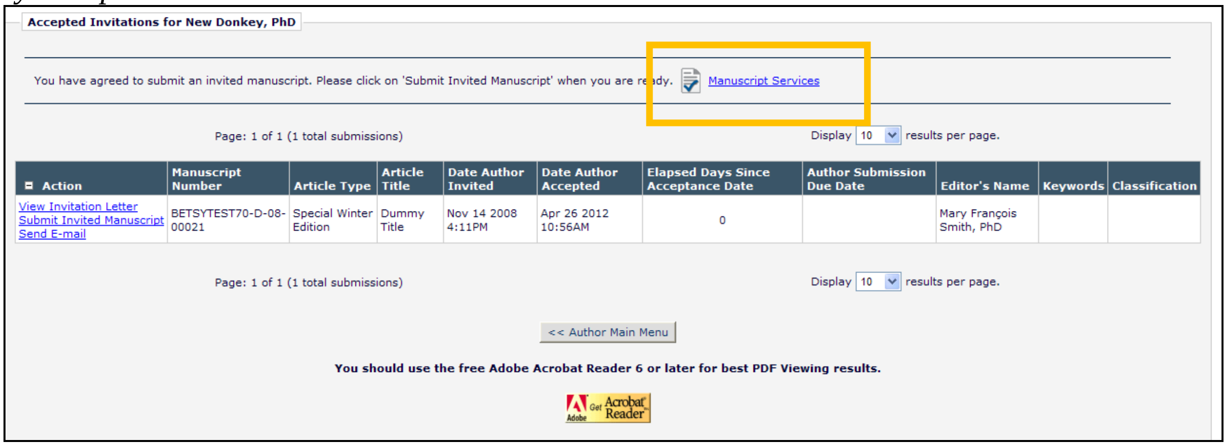
*Login Page:*




*Author Main Menu:*



*My Accepted Invitations:*



**Accepted Invitations for New Donkey, PhD**

You have agreed to submit an invited manuscript. Please click on 'Submit Invited Manuscript' when you are re[illegible]dy. Manuscript Services

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

| Action | Manuscript Number | Article Type | Article Title | Date Author Invited | Date Author Accepted | Elapsed Days Since Acceptance Date | Author Submission Due Date | Editor's Name | Keywords | Classification |
|---|---|---|---|---|---|---|---|---|---|---|
| View Invitation Letter<br>Submit Invited Manuscript<br>Send E-mail | BETSYTEST70-D-08-00021 | Special Winter Edition | Dummy Title | Nov 14 2008 4:11PM | Apr 26 2012 10:56AM | 0 | | Mary François Smith, PhD | | |

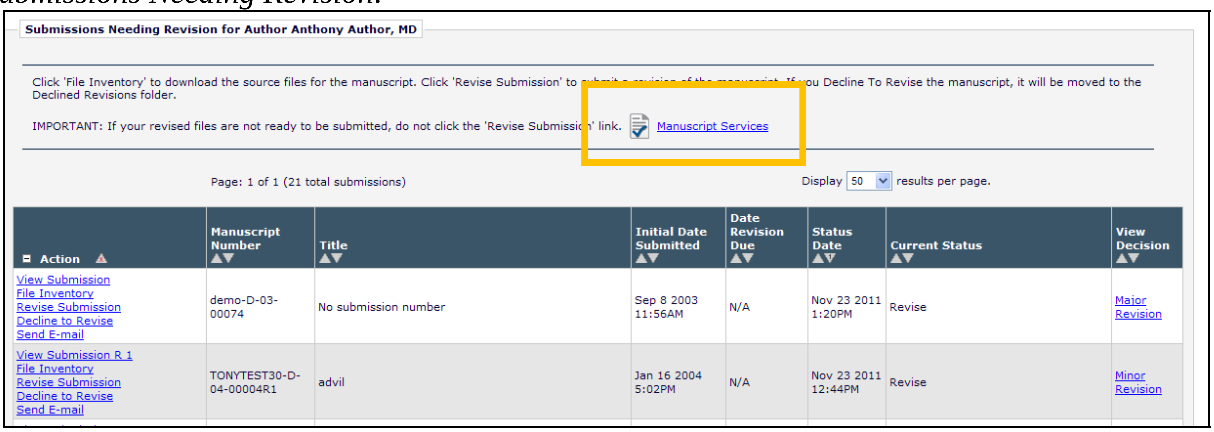
Page: 1 of 1 (1 total submissions) Display 10 results per page.

<< Author Main Menu

**You should use the free Adobe Acrobat Reader 6 or later for best PDF Viewing results.**

Get Acrobat Reader

*Submissions Needing Revision:*



**Submissions Needing Revision for Author Anthony Author, MD**

Click 'File Inventory' to download the source files for the manuscript. Click 'Revise Submission' to [illegible]ou Decline To Revise the manuscript, it will be moved to the Declined Revisions folder.

IMPORTANT: If your revised files are not ready to be submitted, do not click the 'Revise Submissi[illegible]' link. Manuscript Services

Page: 1 of 1 (21 total submissions) Display 50 results per page.

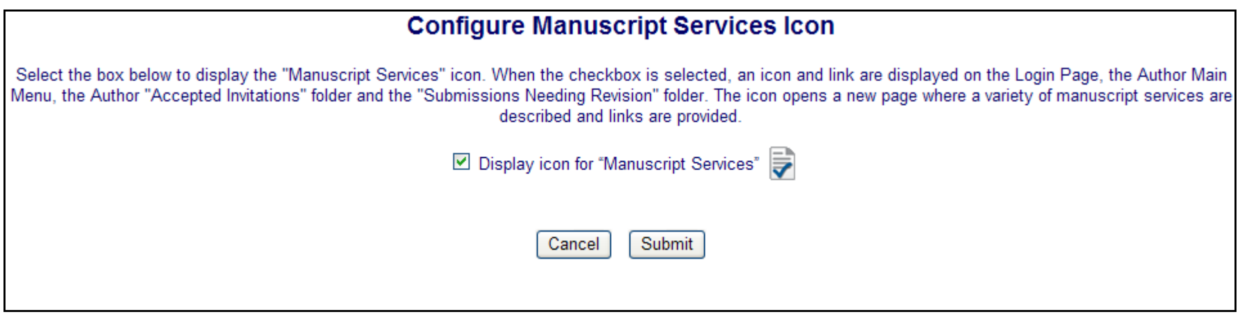
| Action | Manuscript Number | Title | Initial Date Submitted | Date Revision Due | Status Date | Current Status | View Decision |
|---|---|---|---|---|---|---|---|
| View Submission<br>File Inventory<br>Revise Submission<br>Decline to Revise<br>Send E-mail | demo-D-03-00074 | No submission number | Sep 8 2003 11:56AM | N/A | Nov 23 2011 1:20PM | Revise | Major Revision |
| View Submission R 1<br>File Inventory<br>Revise Submission<br>Decline to Revise<br>Send E-mail | TONYTEST30-D-04-00004R1 | advil | Jan 16 2004 5:02PM | N/A | Nov 23 2011 12:44PM | Revise | Minor Revision |

Clicking the link/icon from any of these locations will open a new browser window, and bring the Author to the Aries' Manuscript Services page.

*Sample page; options subject to change:*


TO CONFIGURE:

To provide Authors with the new Manuscript Services link, go to PolicyManager, and click the new <u>Configure Manuscript Services Icon</u> link in the 'Submission Policies' section. Select/check the new 'Display icon for 'Manuscript Services' ' option. This feature is not set/enabled upon upgrade.



## New Personal Identifier Merge Fields

With the inclusion in EM/PM v9.2 of five (5) Personal Identifier data fields, two new merge fields are added for each Personal Identifier in the system – one to include the identifier for the Corresponding Author linked to a specific submission, and one to include the identifier for the recipient of the letter.

Merge fields for Corresponding Author Information:

- %CORRAUTHOR_ISNI%
- %CORRAUTHOR_ORCID%
- %CORRAUTHOR_PUBMEDAUTHID%
- %CORRAUTHOR_RESEARCHERID%
- %CORRAUTHOR_SCOPUSAUTHID%

NOTE: These merge fields may be used in Bibliographic searches

Merge fields for recipient information:

- %ISNI%
- %ORCID%
- %PUBMEDAUTHID%
- %RESEARCHERID%
- %SCOPUSAUTHID%

NOTE: These recipient information merge codes can be used in letters to Co-Authors (i.e., letters triggered by the Co-Author validation functionality). When used in letters to Co-Authors then the identifier is taken from the Co-Author information entered on the Add/Edit Authors step.

TO CONFIGURE:
To use the new merge fields in letters, go to PolicyManager, Edit Letters, and either add a new letter or edit an existing letter. Insert the merge fields into any letter(s) as desired.

## New Pending Assignment Deep Link

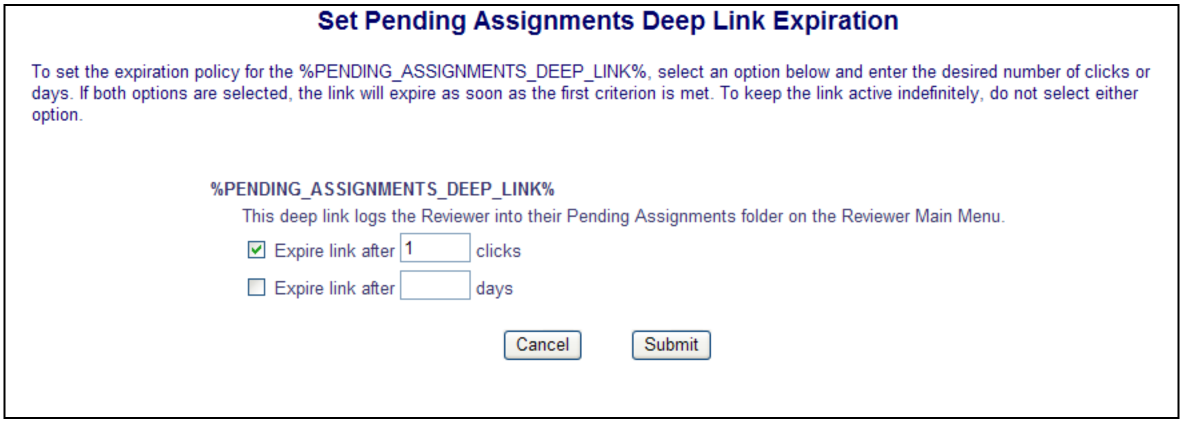
To support the new ‘Assign Reviewer’ feature in EM v9.2, a new Deep Link Merge Field is introduced called %PENDING_ASSIGNMENTS_DEEP_LINK%. This deep link can be used in letters in the Reviewer Invitation and Reviewer Reminder letter families. When this deep link is clicked, the Reviewer is fully logged into the site and navigated to their ‘Pending Assignments’ folder.

The deep link may be configured to expire based on number of clicks or number of days. If the deep link expires, the Reviewer is presented with a Deep Link Error page.


TO CONFIGURE:
To set the deep link expiration policy, click the Set Pending Assignments Deep Link Expiration link in the ‘Reviewer and Editor Form Policies’ section of PolicyManager.


Specify the expiration policy for the deep links (i.e. how long the link is active):

- The option ‘Expire link after 1 clicks’ is selected by default.
- If neither option is selected (both boxes are unchecked), the deep link will remain active indefinitely.


Set Pending Assignments Deep Link Expiration

To set the expiration policy for the %PENDING_ASSIGNMENTS_DEEP_LINK%, select an option below and enter the desired number of clicks or days. If both options are selected, the link will expire as soon as the first criterion is met. To keep the link active indefinitely, do not select either option.

%PENDING_ASSIGNMENTS_DEEP_LINK%

This deep link logs the Reviewer into their Pending Assignments folder on the Reviewer Main Menu.

☑ Expire link after 1 clicks

☐ Expire link after days

Cancel Submit

To add the merge field to letters, go to ‘Edit Letters’ in PolicyManager. Select the letter you wish to edit, or create a new letter. Insert the merge field in the desired letters in the Reviewer Invitation or Reviewer Reminder Letter Families.

## Editor Summary Assignment Merge Fields

In EM/PM v9.1, three sets of merge fields were available for use in sending Editor assignment information in letters. These merge fields, used primarily in Automated Editor Summary Reminders but available for use in any letters sent to Editors, display a summary of three key folders by displaying total number of submissions in the folder and the longest elapsed number of days. Some publications would benefit from a way to send out a list of submissions in each of these three folders so Editors may see an easy summary right in the e-mail.

New in EM/PM v9.2, three new merge fields are added that can be used in conjunction with the existing reminder-related merge fields for Editors, allowing them to see the submissions contained in the current workloads in certain folders:

- **%EDITOR_NEW_INVITATIONS_SUBMISSIONS% -** Provides a numbered listing of all submissions in the Editor's *New Invitations* folder. The listing displays in the following way:

    n. %MS_NUMBER%: %ARTICLE_TITLE%
    (Number of days submission has been in the folder) Days Elapsed Since Invitation
    All Authors on the submission by order defined for the submission/revision

    First 75 words of Abstract {If the abstract is truncated, three dots … follow the 75th word to indicate that a truncation has occurred.}

    n+1. %MS_NUMBER%: %ARTICLE_TITLE%
    etc.…

- **%EDITOR_NEW_ASSIGNMENTS_SUBMISSIONS% -** Provides a numbered listing of all submissions in the Editor's *New Assignments* folder. The listing displays in the following way:

    n. %MS_NUMBER%: %ARTICLE_TITLE%
    (Number of days submission has been in the folder) Days Elapsed Since Assignment
    All Authors on the submission by order defined for the submission/revision

    First 75 words of Abstract {If the abstract is truncated, three dots … follow the 75th word to indicate that a truncation has occurred.}

    n+1. %MS_NUMBER%: %ARTICLE_TITLE%
    etc.…

- **%EDITOR_REQUIRED_REVIEWS_COMPLETE_SUBMISSIONS% -** Provides a numbered listing of all submissions in the Editor's *Submissions with Required Reviews Complete* folder. The listing displays in the following way:

  n. %MS_NUMBER%: %ARTICLE_TITLE%
  (Number of days submission has been in the folder) Days Elapsed Since Required Reviews Complete
  All Authors on the submission by order defined for the submission/revision

  n+1. %MS_NUMBER%: %ARTICLE_TITLE%
  etc.…

These merge fields can be added to the Editor Summary Reminder letters to provide additional information to Editors on their outstanding assignments.

TO CONFIGURE:
To include any of these merge fields in existing letters, or to create a new letter, go to PolicyManager, Edit Letters, and select a letter to edit or add a new letter.

NOTE: It is recommended that these new merge fields be included in conjunction with the relevant existing merge fields for clarity on the part of the receiving editor:

- **%EDITOR_NEW_INVITATIONS_TOTAL%**
- **%EDITOR_NEW_INVITATIONS_DAYS%**
- **%EDITOR_NEW_ASSIGNMENTS_TOTAL%**
- **%EDITOR_NEW_ASSIGNMENTS_DAYS%**
- **%EDITOR_REQUIRED_REVIEWS_COMPLETE_TOTAL%**
- **%EDITOR_REQUIRED_REVIEWS_COMPLETE_DAYS%**

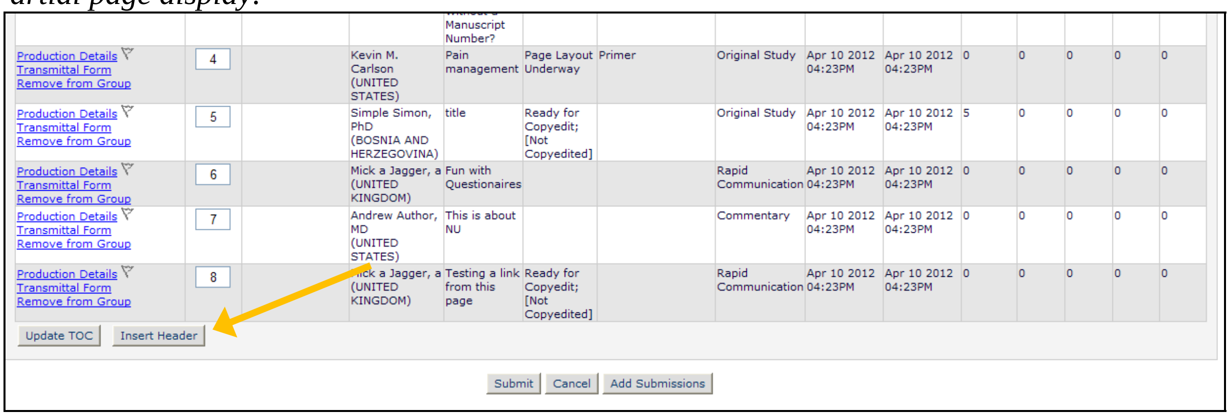
# PRODUCTION TRACKING ENHANCEMENTS

## Schedule Group TOC Headers

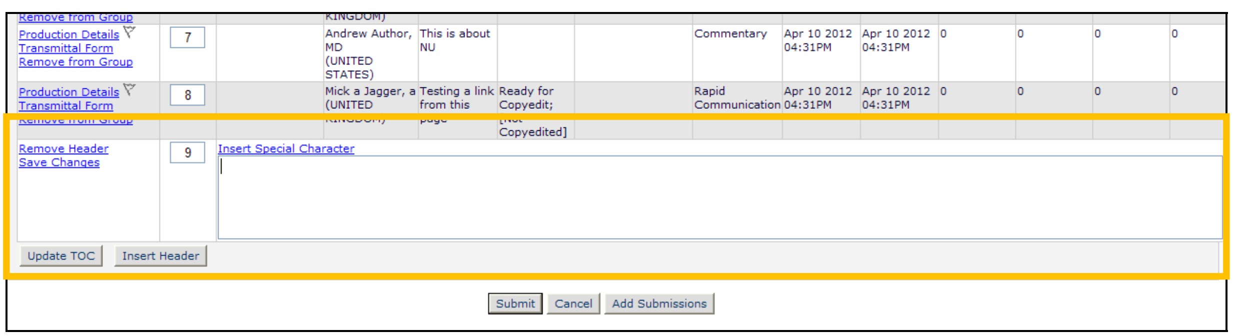
In PM v9.1, publications may organize submissions into Schedule Groups, for purposes of coordinating an issue for publication.  Often times other information may be included in a publication that does not include submission files, and users could benefit from a place holder-type feature.

New in PM v9.2, publications may now add a Header into a Schedule Group Table of Contents, using this as a way of assigning pages in an issue that are not associated with a specific submission.  To use this feature, users of PM (with Manage Schedule Groups permission enabled) go to the *Manage Schedule Group* folder on the Production Tasks Main Menu, and click the 'Edit Group Details' link for the desired Schedule Group.  Once on the *Edit Group Details* page, users will see a new 'Insert Header' button below the list of submissions in the Schedule Group.  NOTE: The Update Target TOC Position is renamed Update TOC.

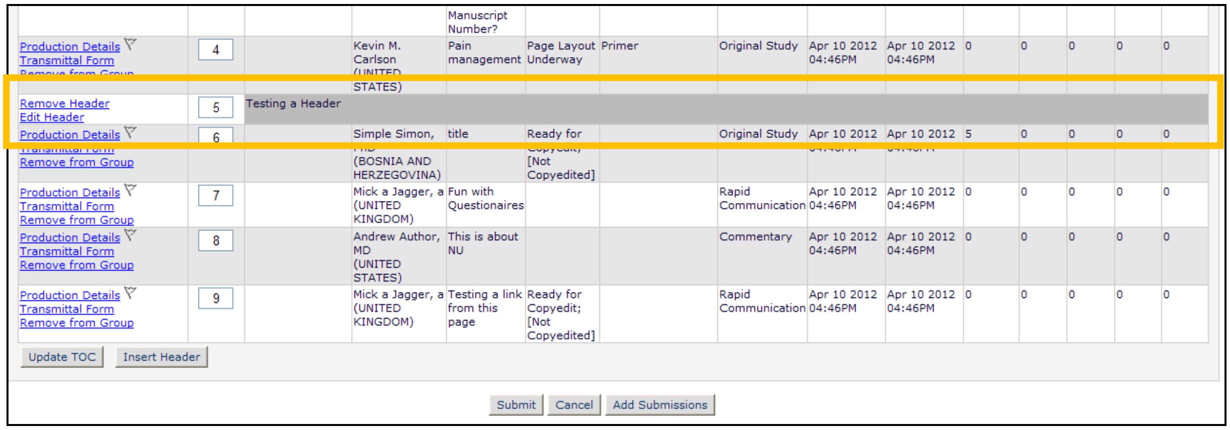
*Partial page display:*




Clicking the 'Insert Header' button inserts a new row at the bottom of the grid.




The user may type the Header information in the blank field and then click the Save Changes link to commit the Header to the Table of Contents.  If the user chooses to remove the Header, the Remove Header link can be used to do so.  If the user wishes to change the order of the Table of Contents, the number may be changed in the 'Target TOC Position' column and then the user can click the 'Update TOC' button to save the new Header and change the order.



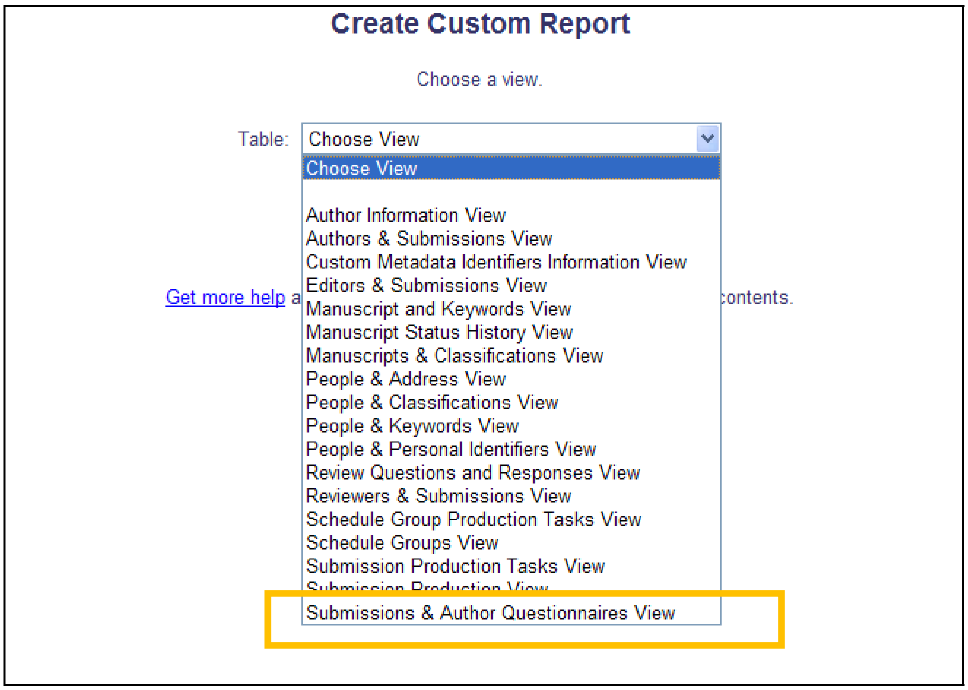

To make additional changes to this Header, the user may click the Edit Header link, opening the text up for editing again.

TO CONFIGURE:
No configuration is required to use this feature. Users with 'Manage Schedule Groups' permission will have this new functionality available to them upon upgrade to PM v9.2.

# CUSTOM REPORTS ENHANCEMENTS

## Submission & Author Questionnaires Custom Report View

In EM/PM v9.1, publications using Production Tracking had access to a limited set of data for the Custom Submission Questions. Users could report for a specific 7-day window using the 'Submission & Author Questionnaires View'. New in EM v9.2, this view is now available in the list of available views for all publications, and the 7-day window restriction has been removed. This view appears at the bottom of the 'Table' drop-down list on the *Create Custom Report* page.




The following output fields are available in this new view:

| |
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| **Article Title** **[DOCUMENT.DTITLE]**<br>Title entered by Author when submitting a new manuscript. |
| **Short Title** **[DOCUMENT.SHORT_TITLE]**<br>Short Title entered by Author when submitting a new manuscript. |
| **Article Type** **[DOCUMENT.CATEGORY]**<br>Article Type is required for submission. Values are defined by the journal, and may include values such as Original Study, Rapid Communication, Case Study. |
| **Initial Date Submitted** **[DOCUMENT.RECEIVED]**<br>The date the Author approved his initial submission of the manuscript, and it was received by the journal office. This is the date that is used to calculate the elapsed time to decision for a submission.<br>**Hints:** The Initial Date Submitted may be overwritten if the Editor edits the submission and sends it back to the Author for approval before another Editor is assigned (edited in New Submissions folder) or before any Reviewers have been invited (edited in New Assignments folder). In this case, the original Received Date is overwritten with the date the Author approved the edited submission. |

| |
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| **Technical Check Completion Date [REVHIST.TECHNICAL_CHECK_COMPLETE_DATE]**<br>Timestamp indicating when an Editor specified the Technical Check for a submission is complete. |
| **Editorial Status [DSTATUS.NAME]**<br>Editorial Status Term defined by the journal. |
| **Editorial Status Date [DOCUMENT.STATUSDATE]**<br>Date the Status changed in the Manuscript Status field. The journal defines the changes in status for each event in ActionManager.<br>**Hints:** Note that some events are non-configurable by the journal. |
| **Edit Submission Status Term [EDIT_SUBMISSION_STATUS.EDIT_SUBMISSION_STATUS_NAME]**<br>Edit Submission Status name which is associated with the ID value. |
| **Edit Submission Status Date [DOCUMENT.EDIT_SUBMISSION_STATUS_DATE]**<br>The date the last edit event occurred for the submission. |
| **First Decision Editor First Name**<br>**[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITOR_FIRST_DECISION_FIRSTNAME]**<br>The first name of the first Editor to make a decision on the submission. |
| **First Decision Editor Last Name**<br>**[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITOR_FIRST_DECISION_LASTNAME]**<br>The last name of the first Editor to make a decision on the submission. |
| **Final Decision Editor First Name**<br>**[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITOR_FINAL_DECISION_FIRSTNAME]**<br>The first name of the Editor who made the final decision on the submission<br>**Hints:** Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will trigger this field to be set. |
| **Final Decision Editor Last Name**<br>**[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITOR_FINAL_DECISION_LASTNAME]**<br>The last name of the Editor who made the final decision on the submission<br>**Hints:** Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will trigger this field to be set. |
| **Final Disposition Term [DDISPOSI.NAME]**<br>Allowable values for a regular submission: Accept, Reject, Withdrawn. Allowable values for a Proposal: Completed Proposal, Withdrawn Proposal. Allowable values for a conference submission: Accept and Transmit, Accept for Extraction, Reject, Withdrawn. These terms are defined by Aries, and are not configurable by the journal. Only the "Withdraw" option is available for a regular submission until the Author has been notified of the Editor's decision.<br>**Hints:** Value is null (blank) if the Final Disposition has not yet been set. To find all submissions Accepted for publication, user can enter criteria Final Disposition Term = 'Accept', or Final Disposition Term BEGINS WITH 'Acc'. |
| **Date Final Disposition Set [DOCUMENT.DDISPOSIDATE]**<br>Date the final disposition was set on the manuscript. |
| **Days to Final Disposition [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.DAYS_TO_FINAL_DISPOSITION]**<br>The elapsed days between the document's initial date of submission and the date the Final Disposition was set. |
| **Manuscript Number [DOCUMENT.PUBDNUMBER]**<br>Manuscript Number is assigned to a submission after it is received by the journal office. If the journal assigns Manuscript Numbers automatically, the system assigns the number when the submission is assigned to an Editor. If the journal assigns Manuscript Numbers manually, the Manuscript Number must be assigned before the submission can be assigned to an Editor. The value is null (blank) until this point (e.g. while Author is submitting his manuscript, while PDF is being built). |

**Unique Document ID** [DOCUMENT.DOCUMENTID]
Unique identifier for each submission in the system. This is the number used in several other tables to specify data related to a particular submission.

**Submission Number** [DOCUMENT.SUBNUMBER]
Unique identifier for each submission in the system. Is assigned as soon as the Author enters a title for his submission. This number is used internally for sorting purposes, and is not displayed on EM screens.

**Last Update Date** [DOCUMENT.LASTUPDATE]
Date of the most recent change to this table. This field is overwritten every time an Author or Editor edits a submission.

**Final Decision Date** [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.FINALDECISIONDATE]
The date on which the Author was notified of the final decision.
**Hints:** Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will trigger this field to be set.

**Date of Initial Submission Final Decision**
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.DATE_OF_FIRST_DECISION]
Date on which the editorial decision regarding the initial submission (Revision 0) was finalized (i.e. the date of the last Editor's decision before the Author is notified).

**Initial Submission Final Decision Term**
[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.FIRST_DECISION_TERM]
The final editorial decision regarding the initial submission (Revision 0) - i.e. the last Editor's decision before the Author is notified.

**Final Decision Term** [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.FINAL_DECISION_TERM]
The final editorial decision on the submission.
**Hints:** Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will appear in this field.

**Days to Final Decision** [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.DAYS_TO_FINAL_DECISION]
The days elapsed between the document's initial date of submission and the date on which the Author was notified of the final decision.
**Hints:** Please note that decisions in the 'Revise' decision family are not considered final decisions. Only decisions in the 'Accept' or 'Reject' families will allow this field to be calculated.

**Days with Author(s)** [DOCUMENT.AUTHDAYS]
Number of Days the submission was 'in the hands' of the Author. This field is currently not populated in this table.

**Editorial Days** [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.EDITDAYS]
The sum of all the days during which the submission was with an Editor.
**Hints:** This is calculated by adding the number of days from the 'Days in Status' column of the Status History Table for all statuses assigned to an Editor role family.

**Review Days** [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.REVUDAYS]
The total number of days that the submission was under review.
**Hints:** This is calculated by adding the number of days from the 'Days in Status' column of the Status History Table for all statuses assigned to a Reviewer role family.

**Target Online Publication Date** [DOCUMENT.TARGET_ONLINE_PUB_DATE]
Target Online Publication Date

**Submission Target Publication Date** [SUBMISSION_PRODUCTION.TARGET_PUB_DATE]
This submission's individual target publication date.

**Submission Target Publication Volume** [SUBMISSION_PRODUCTION.TARGET_PUB_VOLUME]
This submission's individual target publication volume.

**Submission Target Publication Issue [SUBMISSION_PRODUCTION.TARGET_PUB_ISSUE]**
This submission's individual target publication issue.

**Actual Online Publication Date [DOCUMENT.ACTUAL_ONLINE_PUB_DATE]**
Actual Online Publication Date

**Publication Date [DOCUMENT.PUBDATE]**
Date the submission is to be published. Updatable on publisher information page and on the Transmittal Form.

**Publication Volume Number [DOCUMENT.PUBVOLUME]**
Journal's Volume Number in which the submission is to be published. Updatable on publisher information page and on the Transmittal Form.

**Publication Issue Number [DOCUMENT.PUBISSUE]**
Journal's Issue Number in which the submission is to be published. Updatable on publisher information page and on the Transmittal Form.

**Print Pages of Article [DOCUMENT.SETPAGES]**
Total number of pages the article occupies in the printed journal. Updatable on publisher information page and on the Transmittal Form.

**Publication Start Page [DOCUMENT.START_PAGE]**
Actual Start Page

**Publication End Page [DOCUMENT.END_PAGE]**
Actual End Page

**Page Range [DOCUMENT.PRINTPAGES]**
Page range the article occupies in the printed journal. Updatable on publisher information page and on the Transmittal Form.

**Table of Contents Position [DOCUMENT.TOC]**
Article's numeric position in the Table of Contents of the printed journal. Updatable on publisher information page and on the Transmittal Form.

**Manuscript Geographic Region of Origin [DOCUMENT_VIEW.REGION_NAME]**
Entered by the Author or Editor as a manuscript submission step. It may be a country or a custom-defined region.

**Manuscript Notes [DOCUMENT.DNOTE]**
The Note about the manuscript displayed or edited in the Manuscript Details.

**Technical Notes [DOCUMENT.TECHNOTES]**
Technical Notes entered on the Technical Check/Information page.

**Conference Name [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_NAME]**
The name of the conference for which this paper was submitted

**Conference Presentation Type [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_PRESENTATION_TYPE]**
The type of conference presentation associated with this submission

**Conference Presentation Date [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_PRESENTATION_DATE]**
The date of the Conference Presentation associated with this submission

**Conference Session [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_SESSION]**
The conference session with which this submission is associated

| |
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| **Conference Presentation Sequence** **[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_PRESENTATION_SEQUENCE]**<br>The sequence of the conference presentation associated with this submission |
| **Conference Submission Book Title** **[SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.CONFERENCE_SUBMISSION_BOOK_TITLE]**<br>The title of the book in which this conference submission will be included |
| **Production Status Text [SUBMISSION_PRODUCTION.PRODUCTION_STATUS_TEXT]**<br>User-defined Production Status History. |
| **Production Notes [DOCUMENT.PRODUCTION_NOTES]** |
| **Target Table of Contents Position [SCHEDULE_GROUPS_TOC.TABLE_OF_CONTENTS]**<br>Target Table of Contents Position |
| **Target Number of Pages [SUBMISSION_PRODUCTION.TARGET_NUMBER_OF_PAGES]**<br>Target Number of Pages |
| **Target Start Page [SCHEDULE_GROUPS_TOC.TARGET_START_PAGE]**<br>Target Start Page |
| **Target End Page [SCHEDULE_GROUPS_TOC.TARGET_END_PAGE]**<br>Target End Page |
| **Question Order [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.QUESTION_RANK]**<br>The display order of the question when asked for this submission. |
| **Question ID [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.QUESTION_ID]**<br>ID of the record which defines this Custom Submission Question |
| **Question [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.QUESTION]**<br>The actual text of the question as displayed to the user |
| **Question Instructions [CUSTOM_SUBMISSION_QUESTIONNAIRE_QUESTIONS.QUESTION_INSTRUCTIONS]**<br>Instructions to the author on how to answer the question. Used on the additional information page.<br>**Hints:** May be considered to be part of the question by some publications. |
| **Author Response [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.RESPONSE]**<br>The author's response to the custom question |
| **Asked on Original [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.ASKED_ON_ORIGINAL]**<br>Identifies whether this question was asked on original submission. Is True/1 if the question appeared on the Additional Information step during initial submission. Is False/0 if not.<br>**Hints:** Use in conjunction with the Asked on Revision to determine when this question was asked. If both fields are true, then the response may have been modified on any revision. |
| **Asked on Revision [SUBMISSIONS_AUTHOR_QUESTIONNAIRES_VIEW.ASKED_ON_REVISION]**<br>Identifies whether this question was asked when the Revision was submitted. Is True/1 if the question appeared on the Additional Information step during revision, is 0/False if not.<br>**Hints:** Once asked on a Revision (R1, R2, R3, etc.), the answer may be modified on any subsequent revision. Only the most recent answer is stored in the database. |
| **Corresponding Author's People ID [ROLEAUTH.PEOPLEID]**<br>Unique ID for all people records in this table. |
| **Corresponding Author's First Name [PEOPLE.FIRSTNAME]**<br>First Name of the person |
| **Corresponding Author's Middle Name [PEOPLE.MIDDLENAME]**<br>Middle Name of the person |

| |
|---|
| **Corresponding Author's Last Name** **[PEOPLE.LASTNAME]**<br>Last Name of the person |
| **Corresponding Author's E-mail Address** **[ADDRESS.EMAIL]**<br>Users may enter multiple E-mail addresses, delimited by semicolons. If a user has more than one e-mail address in this field, all EM correspondence will be sent to all addresses. |
| **Corresponding Author's Country** **[ADDRESS.COUNTRY]**<br>Country entered for the person's address. If an X appears next to this field on the transmittal form, the country does not match the ISO 3166-1 standard selected by the journal. This information can be corrected on the Search People page. |
| **Corresponding Author's Institution** **[ADDRESS.INSTITUTE]**<br>The person's Institution. |
| **Corresponding Author's Department** **[ADDRESS.DEPARTMENT]**<br>Department entered for the person's address. |
| **Corresponding Author's Address Line 1** **[ADDRESS.ADDRESS1]**<br>First Line of Address |
| **Corresponding Author's Address Line 2** **[ADDRESS.ADDRESS2]**<br>Second line of Address |
| **Corresponding Author's Address Line 3** **[ADDRESS.ADDRESS3]**<br>Third Line of Address |
| **Corresponding Author's Address Line 4** **[ADDRESS.ADDRESS4]**<br>Fourth Line of Address |
| **Corresponding Author's City** **[ADDRESS.CITY]**<br>City entered for the person's address. |
| **Corresponding Author's State/Province** **[ADDRESS.ST]**<br>State entered by user when registering for EM.<br>**Hints:** The State is a required field for any person who has chosen USA or Canada as their Country. |
| **Corresponding Author's Postcode** **[ADDRESS.ZIPCODE]**<br>The person's Zip code. |
| **Date Production Was Initiated** **[DOCUMENT.DATE_PRODUCTION_WAS_INITIATED]**<br>Date the submission was put into production. Updated each time the submission (re)enters production. (See also Date First Entered Production.) |
| **DOI** **[DOCUMENT.DOI]**<br>The Digital Object Identifier (DOI) is an emerging international standard in the publishing industry. This value uniquely identifies this submission to the rest of the world. See http://www.doi.org for more information about this standard.<br>**Hints:** According to the standard referred to above, a digital object identifier must take the form 10.[string]/[string], where [string] is a list of one or more Unicode characters. |

When a report is run using this View, the results will display one row for each question asked. NOTE: If a question is asked on both an original submission AND revisions, ONLY the most recent answer is displayed; earlier responses may be accessed via General Data Export.

As with the other custom report views:

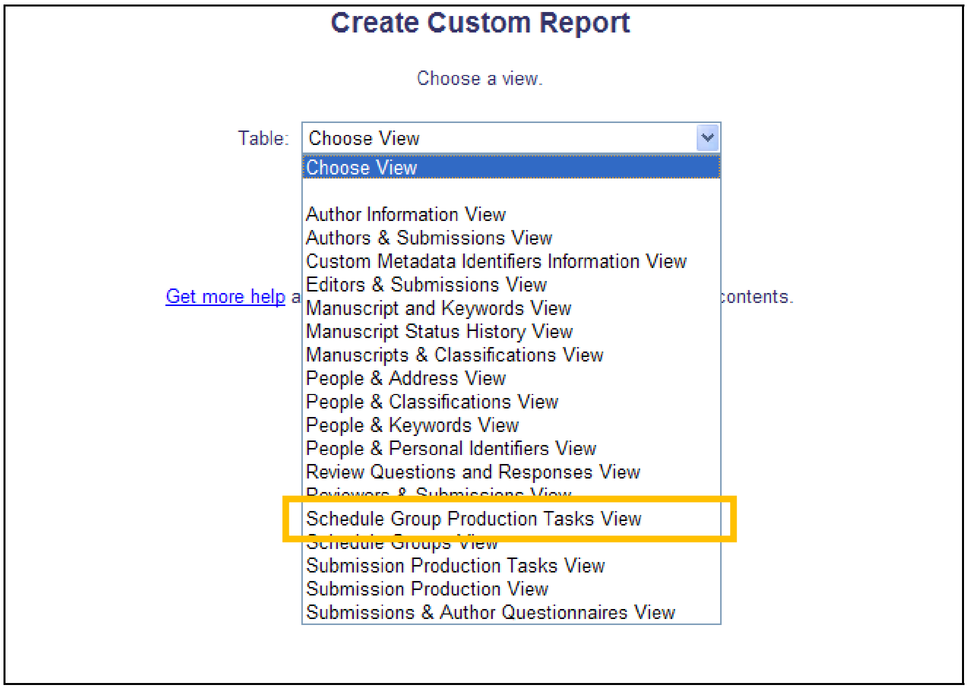
- The report results can be downloaded in a tab-delimited format, suitable for use by Excel or other reporting packages.
- The report can be saved, and will be accessible to the user who saved it.

The view is also available in the list of tables and views on the ‘Data Sources’ tab of Enterprise Analytics Reporting.

TO CONFIGURE:
No configuration is necessary. The new report view will be automatically displayed on the ‘Create Custom Report’ page for all users. The new report view is also automatically displayed for customers with Enterprise Analytics Reporting enabled for their site.

## Schedule Groups Production Tasks View

New in PM v9.2, a new 'Schedule Groups Production Tasks View' is added to the list of available views for Custom Reports. This view provides the user with an overview of all Schedule Group Production Tasks, returning one row per Schedule Group Production Task (may return multiple rows per Schedule Group/Submission).




The following output fields are available in this new view:

| |
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| **Schedule Group Description** [SCHEDULE_GROUPS.SCHEDULE_GROUP_DESCRIPTION]<br>The description of the Schedule Group entered on the Add/Edit Schedule Group Details page |
| **Schedule Group ID** [SCHEDULE_GROUPS.SCHEDULE_GROUP_ID]<br>Uniquely identifies each record in the Schedule Groups table |
| **Target Publication Date - Schedule Group**<br>[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_PUB_DATE]<br>The target publication date for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Target Publication Volume - Schedule Group**<br>[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_VOLUME]<br>The target publication volume for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Target Publication Issue** [SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_ISSUE]<br>The target publication issue for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Target Online Publication Date - Schedule Group**<br>[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_ONLINE_PUB_DATE]<br>The target online publication date for the Schedule Group, as entered on the Add/Edit |

| |
|---|
| Schedule Group Details page |
| **Black and White Image Budget - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_BLACK_N_WHITE_IMAGE_BUDGET]** The total number of black and white images budgeted for the Schedule Group |
| **Date Closed** **[SCHEDULE_GROUPS_REOPEN_CLOSED_DATES.DATE_CLOSED]** Date/time when the schedule group associated with this production task was closed. |
| **Date Re-opened** **[SCHEDULE_GROUPS_REOPEN_CLOSED_DATES.DATE_REOPENED]** Date/time when a schedule group was re-opened. |
| **Schedule Group Production Task Name** **[SCHEDULE_GROUP_TASKS.TASK_NAME]** Name of the Schedule Group Production Task |
| **Globally unique identifier (guid)** **[SCHEDULE_GROUP_TASK_ASSIGNMENT.PTGUID]** Globally unique identifier used to identify a production task. Generally used to identify the production task assignment from an external source such as task that is an export. |
| **Schedule Group Production Task Assignment ID** **[SCHEDULE_GROUP_TASK_ASSIGNMENT.SG_TASK_ASSIGNMENT_ID]** Uniquely identifies each record in the Schedule Group Production Task Assignments table |
| **Schedule Group Production Task Assignment Start Date** **[SCHEDULE_GROUP_TASK_ASSIGNMENT.RSTART]** Date/time when Schedule Group Production Task was assigned |
| **Schedule Group Production Task Assignment Stop Date** **[SCHEDULE_GROUP_TASK_ASSIGNMENT.RSTOP]** Date/time when the Schedule Group Production Task Assignment was cancelled or submitted. |
| **Assigner Role Type** **[SCHEDULE_GROUPS_PRODUCTION_TASK.ASSIGNED_BY_ROLETYPE]** The value in this field identifies the role family of the user that assigned the task. A value of '3' indicates the user was logged in with a role in the Editor role family. A value of '4' indicates the user was logged in with a role in the Publisher role family. |
| **Due Date** **[SCHEDULE_GROUP_TASK_ASSIGNMENT.DUE_DATE]** The Due Date of the Schedule Group Production Task Assignment. |
| **Total Number of Reminders Sent** **[SCHEDULE_GROUP_TASK_ASSIGNMENT.REMIND_COUNT]** The number of Reminders that have been sent to this person for this Schedule Group Production Task. |
| **Date Last Reminder Sent** **[SCHEDULE_GROUP_TASK_ASSIGNMENT.LAST_REMIND_DATE]** Date that this person was last sent a reminder for this Schedule Group Production Task |
| **Last modified DateTime** **[CONFIG.Row_LastModified_TimeStamp]** The date and time of the last update to the record |
| **Black and White Image Count** **[SCHEDULE_GROUPS_PRODUCTION_TASK.BLACK_AND_WHITE_IMAGE_COUNT]** The current total number of black and white images included the schedule group for which this production task was assigned. This number is reached by summing the current black and white image counts for all submissions included in the schedule group. |
| **Color Image Budget - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_COLOR_IMAGE_BUDGET]** The total number of color images budgeted for the Schedule Group |
| **Color Image Count** **[SCHEDULE_GROUPS_PRODUCTION_TASK.COLOR_IMAGE_COUNT]** The current total number of color images included the schedule group for which this production task was assigned. This number is reached by summing the current color image counts for all submissions included in the schedule group. |

| |
|---|
| **Schedule Group Notes** [SCHEDULE_GROUPS.SCHEDULE_GROUP_NOTES]<br>The notes regarding the Schedule Group entered on the Add/Edit Schedule Group Details page |
| **Page Budget - Schedule Group** [SCHEDULE_GROUPS.SCHEDULE_GROUP_PAGE_BUDGET]<br>The budgeted number of pages allotted to this Schedule Group |
| **Current Number of Pages** [SCHEDULE_GROUPS_PRODUCTION_TASK.CURRENT_NUMBER_OF_PAGES]<br>The current total number of pages included the schedule group for which this production task was assigned. This number is reached by summing the current number of pages for all submissions included in the schedule group. |
| **Target Number of Submissions - Schedule Group** [SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_NUMBER_OF_SUBMISSIONS]<br>The target number of submissions to be included in the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Current Number of Submissions** [SCHEDULE_GROUPS_PRODUCTION_TASK.CURRENT_NUMBER_OF_SUBMISSIONS]<br>The current total number of submissions included the schedule group for which this production task was assigned |
| **Assigner First Name** [SCHEDULE_GROUPS_PRODUCTION_TASK.ASSIGNED_BY_FIRSTNAME]<br>This is the first name of the person who assigned this Schedule Group Production Task |
| **Assigner Last Name** [SCHEDULE_GROUPS_PRODUCTION_TASK.ASSIGNED_BY_LASTNAME]<br>This is the last name of the person who assigned this Schedule Group Production Task |
| **Assigner Role** [SCHEDULE_GROUPS_PRODUCTION_TASK.ASSIGNED_BY_ROLE]<br>This is the Role of the person who assigned this Schedule Group Production Task |
| **Assigned to First Name** [SCHEDULE_GROUPS_PRODUCTION_TASK.ASSIGNED_TO_FIRSTNAME]<br>The first name of the person to whom the task was assigned |
| **Assigned to Last Name** [SCHEDULE_GROUPS_PRODUCTION_TASK.ASSIGNED_TO_LASTNAME]<br>The Last Name of the person to whom the task was assigned |
| **Assigned to Role** [SCHEDULE_GROUPS_PRODUCTION_TASK.ASSIGNED_TO_ROLE]<br>The Role of the person whom the task was assigned |
| **Date Task Cancelled** [SCHEDULE_GROUPS_PRODUCTION_TASK.CANCELLED_DATE]<br>This is the date on which the task assignment was cancelled, if applicable |
| **Days Late** [SCHEDULE_GROUPS_PRODUCTION_TASK.DAYS_TASK_WAS_LATE]<br>This value is the number of days after the due date that the task was submitted. If the value is negative, the task was submitted the indicated number of days BEFORE the due date. |
| **Days to Complete** [SCHEDULE_GROUPS_PRODUCTION_TASK.DAYS_BETWEEN_TASK_ASSIGNMENT_AND_COMPLETION]<br>This is the number of days that elapsed between the date the task was assigned and the date it was completed. |

As with the other custom report views:

- The report results can be downloaded in a tab-delimited format, suitable for use by Excel or other reporting packages.
- The report can be saved, and will be accessible to the user who saved it.

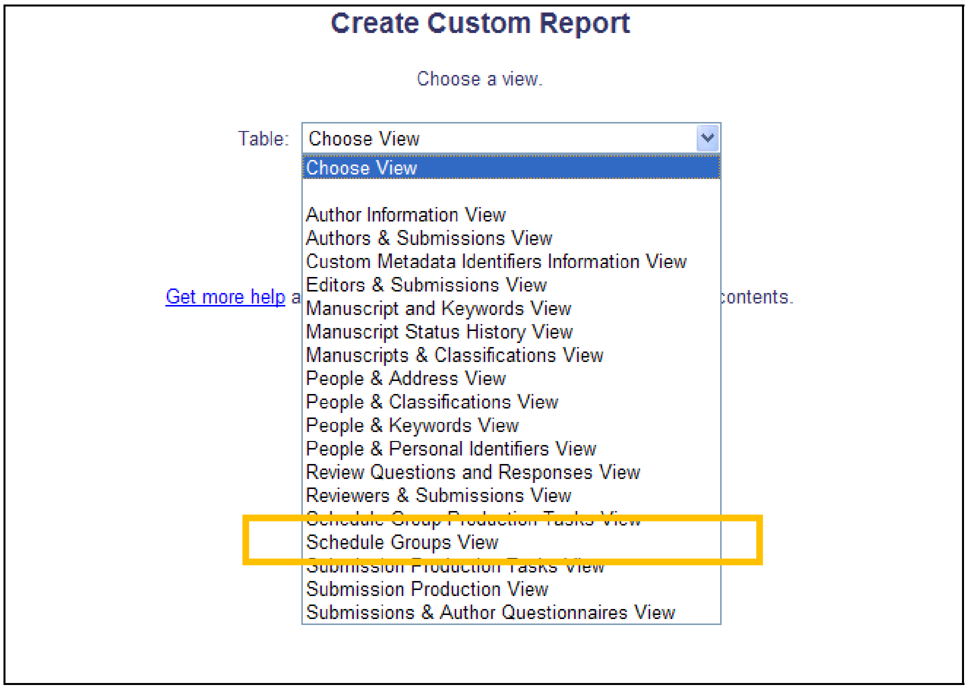
The view is also available in the list of tables and views on the ‘Data Sources’ tab of Enterprise Analytics Reporting.

TO CONFIGURE:
No configuration is necessary.  The new report view will be automatically displayed on the ‘Create Custom Report’ page for all Production Tracking users.  The new report view is also automatically displayed in the ‘Data Sources’ tab for customers with Enterprise Analytics Reporting enabled for their site.

## Schedule Groups View

New in PM v9.2, a new ‘Schedule Groups View’ is added to the list of available views for Custom Reports.  This view provides the user with an overview of all Schedule Group related fields, returning one row per Schedule Group.

NOTE:  To see Schedule Group Production Tasks information, use the new ‘Schedule Groups Production Tasks View’.




The following output fields are available in this new view:

| |
|---|
| **Schedule Group Description** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_DESCRIPTION]**<br>The description of the Schedule Group entered on the Add/Edit Schedule Group Details page |
| **Schedule Group ID** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_ID]**<br>The ID of the Schedule Group to which this submission is assigned |
| **Target Publication Date - Schedule Group**<br>**[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_PUB_DATE]**<br>The target publication date for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Target Publication Volume - Schedule Group**<br>**[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_VOLUME]**<br>The target publication volume for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Target Publication Issue - Schedule Group**<br>**[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_ISSUE]**<br>The target publication issue for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |

| |
|---|
| **Target Online Publication Date - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_ONLINE_PUB_DATE]** The target online publication date for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Schedule Group Black And White Image Budget** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_BLACK_N_WHITE_IMAGE_BUDGET]** The total number of black and white images budgeted for the Schedule Group |
| **Date Closed - Schedule Group** **[SCHEDULE_GROUPS_REOPEN_CLOSED_DATES.DATE_CLOSED]** Date/time when this schedule group was closed. |
| **Black and White Image Count - Schedule Group** **[SCHEDULE_GROUPS_VIEW.BLACK_AND_WHITE_IMAGE_COUNT]** The total number of black and white images included in the Schedule Group |
| **Notes - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_NOTES]** The notes regarding the Schedule Group entered on the Add/Edit Schedule Group Details page |
| **Date Re-opened - Schedule Group** **[SCHEDULE_GROUPS_REOPEN_CLOSED_DATES.DATE_REOPENED]** Date/time when this schedule group was re-opened. |
| **Color Image Count - Schedule Group** **[SCHEDULE_GROUPS_VIEW.COLOR_IMAGE_COUNT]** The total number of color images included in the Schedule Group |
| **Schedule Group Color Image Budget** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_COLOR_IMAGE_BUDGET]** The total number of color images budgeted for the Schedule Group |
| **Page Budget - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_PAGE_BUDGET]** The budgeted number of pages allotted to this Schedule Group **Hints:** To compare the budget to the number of pages already allocated, compare this figure to the number in the "Current Number of Pages - Schedule Group" column for this record |
| **Current Number of Pages - Schedule Group** **[SCHEDULE_GROUPS_VIEW.CURRENT_NUMBER_OF_PAGES]** The sum of the target number of pages for each submission that is currently included in the Schedule Group |
| **Target Number of Submissions - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_NUMBER_OF_SUBMISSIONS]** The target number of submissions to be included in the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Current Number of Submissions - Schedule Group** **[SCHEDULE_GROUPS_VIEW.CURRENT_NUMBER_OF_SUBMISSIONS]** The number of submissions currently included in this Schedule Group |

As with the other custom report views:

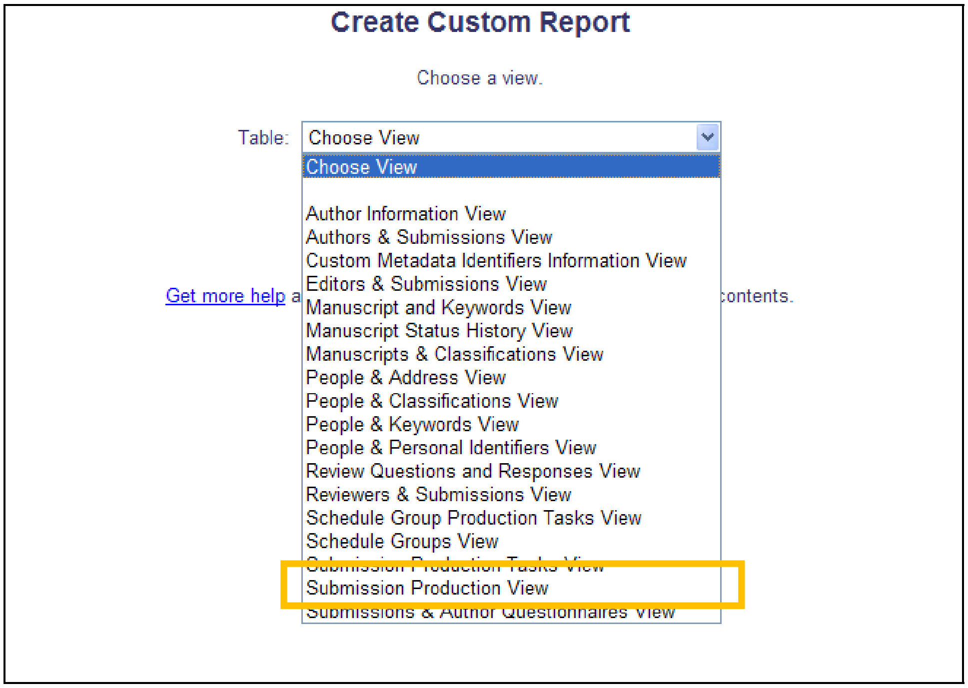
- The report results can be downloaded in a tab-delimited format, suitable for use by Excel or other reporting packages.
- The report can be saved, and will be accessible to the user who saved it.

The view is also available in the list of tables and views on the ‘Data Sources’ tab of Enterprise Analytics Reporting.

TO CONFIGURE:
No configuration is necessary. The new report view will be automatically displayed on the 'Create Custom Report' page for all Production Tracking users. The new report view is also automatically displayed in the 'Data Sources' tab for customers with Enterprise Analytics Reporting enabled for their site.

## Submission Production View

New in PM v9.2, a new ‘Submission Production View’ is added to the list of available views for Custom Reports.  This view provides the user with an overview of the Production-related fields associated with a submission, as well as some basic submission metadata.  This view returns one row per submission.




The following output fields are available in this new view:

| |
|---|
| **Unique Document ID** **[DOCUMENT.DOCUMENTID]**<br>Unique identifier for each submission in the system. This is the number used in several other tables to specify data related to a particular submission. |
| **DOI** **[DOCUMENT.DOI]**<br>The Digital Object Identifier (DOI) is an emerging international standard in the publishing industry. This value uniquely identifies this submission to the rest of the world. See http://www.doi.org for more information about this standard.<br>**Hints:** According to the standard referred to above, a digital object identifier must take the form 10.[string]/[string], where [string] is a list of one or more Unicode characters. |
| **Manuscript Number** **[DOCUMENT.PUBDNUMBER]**<br>Manuscript Number is assigned to a submission after it is received by the journal office. If the journal assigns Manuscript Numbers automatically, the system assigns the number when the submission is assigned to an Editor. If the journal assigns Manuscript Numbers manually, the Manuscript Number must be assigned before the submission can be assigned to an Editor. The value is null (blank) until this point (e.g. while Author is submitting his manuscript, while PDF is being built). |
| **Revision Number** **[DOCUMENT.REVISION]**<br>Revision Number - Value is '0' for Original Submissions, '1' for Revision 1, '2' for Revision 2, etc. |

**Article Type** **[DOCUMENT.CATEGORY]**
Article Type is required for submission. Values are defined by the journal, and may include values such as Original Study, Rapid Communication, Case Study.

**Submission Section/Category** **[SECTION.SECTIONNAME]**
Section Name

**Corresponding Author First Name** **[SUBMISSION_PRODUCTION_VIEW.FIRSTNAME]**
The Corresponding Author’s first name as recorded at the time of submission

**Corresponding Author Middle Name** **[SUBMISSION_PRODUCTION_VIEW.MIDDLENAME]**
The Corresponding Author’s middle name as recorded at the time of submission

**Corresponding Author Last Name** **[SUBMISSION_PRODUCTION_VIEW.LASTNAME]**
The Corresponding Author’s last name as recorded at the time of submission

**Corresponding Author City** **[SUBMISSION_PRODUCTION_VIEW.CITY]**
City of the Corresponding Author's address, as entered during the submission process
**Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

**Corresponding Author State** **[SUBMISSION_PRODUCTION_VIEW.STATE]**
The state in which the Corresponding Author resided at the time the manuscript was submitted
**Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

**Corresponding Author Postal Code** **[SUBMISSION_PRODUCTION_VIEW.ZIPCODE]**
The Postal Code of the Corresponding Author’s address at the time of submission
**Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

**Corresponding Author Country** **[SUBMISSION_PRODUCTION_VIEW.EM_NAME]**
The Corresponding Author’s country at the time of submission

**Corresponding Author E-mail Address** **[SUBMISSION_PRODUCTION_VIEW.EMAIL]**
The Corresponding Author’s e-mail address at the time of submission

**Corresponding Author Position** **[SUBMISSION_PRODUCTION_VIEW.POSITION]**
The Corresponding Author’s Position (e.g., Department Chief, President, etc.) at the time of submission
**Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

**Corresponding Author Department** **[SUBMISSION_PRODUCTION_VIEW.DEPARTMENT]**
The Corresponding Author’s department at the time of submission
**Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

**Corresponding Author Institution** **[SUBMISSION_PRODUCTION_VIEW.INSTITUTE]**
The Corresponding Author’s Institution at the time of submission
**Hints:** This field may be configured as hidden, optional, or required by the publication and is stored in relation to a specific submission. If the Author also has a People record in the publication, the information in this field may differ from that record.

**Degree** **[SUBMISSION_PRODUCTION_VIEW.DEGREE]**

| |
|---|
| Degrees held by the person (e.g. Ph.D., MD, FACEP, FAC, DO) |
| **Initial Date Submitted** **[DOCUMENT.RECEIVED]**<br>The date the Author approved his initial submission of the manuscript, and it was received by the journal office. This is the date that is used to calculate the elapsed time to decision for a submission.<br>**Hints:** The Initial Date Submitted may be overwritten if the Editor edits the submission and sends it back to the Author for approval before another Editor is assigned (edited in New Submissions folder) or before any Reviewers have been invited (edited in New Assignments folder). In this case, the original Received Date is overwritten with the date the Author approved the edited submission. |
| **Final Decision Date** **[DOCUMENT.FINALDECISIONDATE]**<br>Most recent Editor's decision date, that is, date when the final decision was made by the Editor. |
| **Date Final Disposition Set** **[DOCUMENT.DDISPOSIDATE]**<br>Date the final disposition was set on the manuscript. |
| **Date First Entered Production** **[DOCUMENT.DATE_FIRST_ENTERED_PRODUCTION]**<br>Date the submission was put into production for the first time. Not updated if a submission reenters production. (See also Date Production Was Initiated.) |
| **Date Production Was Initiated** **[DOCUMENT.DATE_PRODUCTION_WAS_INITIATED]**<br>Date the submission was put into production. Updated each time the submission (re)enters production. (See also Date First Entered Production.) |
| **Date Production Was Completed** **[DOCUMENT.DATE_PRODUCTION_WAS_COMPLETED]**<br>Date production was completed for the submission. |
| **Submission Target Publication Date** **[SUBMISSION_PRODUCTION.TARGET_PUB_DATE]**<br>This submission's individual target publication date. |
| **Submission Target Publication Volume** **[SUBMISSION_PRODUCTION.TARGET_PUB_VOLUME]**<br>This submission's individual target publication volume. |
| **Submission Target Publication Issue** **[SUBMISSION_PRODUCTION.TARGET_PUB_ISSUE]**<br>This submission's individual target publication issue. |
| **Submission Target Online Publication Date**<br>**[SUBMISSION_PRODUCTION.TARGET_ONLINE_PUB_DATE]**<br>This submission's individual target online publication date. |
| **Submission Target Number of Pages**<br>**[SUBMISSION_PRODUCTION.TARGET_NUMBER_OF_PAGES]**<br>Target Number of Pages |
| **Actual Online Publication Date** **[DOCUMENT.ACTUAL_ONLINE_PUB_DATE]**<br>Actual Online Publication Date |
| **Submission Actual Publication Date** **[DOCUMENT.PUBDATE]**<br>Date the submission is to be published. Updatable on publisher information page and on the Transmittal Form. |
| **Submission Actual Publication Volume** **[DOCUMENT.PUBVOLUME]**<br>Journal's Volume Number in which the submission is to be published. Updatable on publisher information page and on the Transmittal Form. |
| **Submission Actual Publication Issue** **[DOCUMENT.PUBISSUE]**<br>Journal's Issue Number in which the submission is to be published. Updatable on publisher information page and on the Transmittal Form. |

**Submission Actual Publication Start Page** [DOCUMENT.START_PAGE]
Actual Start Page

**Submission Actual Publication End Page** [SUBMISSION_PRODUCTION_VIEW.END_PAGE]
The actual end page of the submission as published

**Actual Print Pages of Submission** [DOCUMENT.SETPAGES]
Total number of pages the article occupies in the printed journal. Updatable on publisher information page and on the Transmittal Form.

**Black and White Image Count**
[SUBMISSION_PRODUCTION.BLACK_AND_WHITE_IMAGE_COUNT]
Black and White Image Count

**Color Image Count** [SUBMISSION_PRODUCTION.COLOR_IMAGE_COUNT]
Color Image Count

**The 'Publish With ID' Assigned to this Submission** [DOCUMENT.PWID_ID]
ID of the PUBLISH_WITH_ID record assigned to this submission.

**Submission Created Using Short Interface**
[DOCUMENT.CREATED_USING_SHORT_INTERFACE]
Set to 1 if this submission was created using the "Short" Submission Interface (via Search People from the Production Tasks menu). The "Short" Submission Interface allows editors with Create Submission permission to create new submissions using a simplified workflow. Submissions are placed directly into Production Tracking on behalf of authors, automatically initiating production on the submissions.

**Import Date** [DOCUMENT.IMPORT_DATE]
Date that a submission was imported from a third-party system. This date is NULL by default, meaning that the submission was not imported from a third-party system.

**Production Notes** [DOCUMENT.PRODUCTION_NOTES]

**Custom Production Status Term**
[SUBMISSION_PRODUCTION_VIEW.PRODUCTION_STATUS_TEXT]
This is the publication-defined production status term

**EM Production Status** [SUBMISSION_PRODUCTION_VIEW.PRODUCTION_STATUS]
This value indicates the state of production the submission is currently in: 1= Not In Production 2= In Production 3= Production Completed 4 = Returned to Production 5 = Production Cancelled 6 = Production Initiated

**Submission Schedule Slip Figure** [SUBMISSION_PRODUCTION_VIEW.SCHEDULE_SLIP]
Production tasks may have a “Must Start By” and a “Must End By” date. If the task is still incomplete, and was not started on time, the difference in days between the “Must Start By” date and the actual start date is the task’s slip. If the task has been completed, the difference in days between the “Must End By” date and the date on which the task was actually completed is considered the task’s slip. The overall Submission Schedule Slip is determined by the task with the largest slip figure.

**Description - Schedule Group** [SCHEDULE_GROUPS.SCHEDULE_GROUP_DESCRIPTION]
The description of the Schedule Group entered on the Add/Edit Schedule Group Details page

**Schedule Group ID** [SCHEDULE_GROUPS.SCHEDULE_GROUP_ID]
This identifies the Schedule Group with which this submission is associated

**Target Publication Date - Schedule Group**
[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_PUB_DATE]
The target publication date for the Schedule Group, as entered on the Add/Edit Schedule Group Details page

| |
|---|
| **Target Publication Volume - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_VOLUME]**<br>The target publication volume for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Target Publication Issue - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_ISSUE]**<br>The target publication issue for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Target Online Publication Date - Schedule Group** **[SCHEDULE_GROUPS.SCHEDULE_GROUP_TARGET_ONLINE_PUB_DATE]**<br>The target online publication date for the Schedule Group, as entered on the Add/Edit Schedule Group Details page |
| **Submission Target Start Page** **[SUBMISSION_PRODUCTION_VIEW.TARGET_START_PAGE]**<br>The target start page of this submission within the Schedule Group |
| **Submission Target End Page** **[SUBMISSION_PRODUCTION_VIEW.TARGET_END_PAGE]**<br>The target end page of this submission within the Schedule Group |
| **Submission Target Table of Contents Position** **[SUBMISSION_PRODUCTION_VIEW.TABLE_OF_CONTENTS]**<br>The target Table of Contents position for this submission within the Schedule Group |
| **Corresponding Author First Name** **[SUBMISSION_PRODUCTION_VIEW.CORR_AUTHOR_FIRSTNAME]**<br>The First Name of the Corresponding Author |
| **Corresponding Author Middle Name** **[SUBMISSION_PRODUCTION_VIEW.CORR_AUTHOR_MIDDLENAME]**<br>The Middle Name of the Corresponding Author |
| **Corresponding Author Last Name** **[SUBMISSION_PRODUCTION_VIEW.CORR_AUTHOR_LASTNAME]**<br>The Last Name of the Corresponding Author<br>**Hints:** |
| **Corresponding Production Editor Role** **[SUBMISSION_PRODUCTION_VIEW.Editor_Role]**<br>The editor role of the Corresponding Production Editor for the current revision of the submission |
| **Corresponding Production Editor Degree** **[SUBMISSION_PRODUCTION_VIEW.CORR_EDITOR_DEGREE]**<br>The Degree entered in the People record of the Corresponding Production Editor for the current revision of the submission |
| **Corresponding Production Editor First Name** **[SUBMISSION_PRODUCTION_VIEW.CORR_EDITOR_FIRSTNAME]**<br>The first name of the Corresponding Production Editor for the current revision of the submission |
| **Corresponding Production Editor Last Name** **[SUBMISSION_PRODUCTION_VIEW.CORR_EDITOR_LASTNAME]**<br>The last name of the Corresponding Production Editor for the current revision of the submission |
| **Corresponding Production Editor Middle Name** **[SUBMISSION_PRODUCTION_VIEW.CORR_EDITOR_MIDDLENAME]**<br>The middle name of the Corresponding Production Editor for the current revision of the submission |

As with the other custom report views:

- The report results can be downloaded in a tab-delimited format, suitable for use by Excel or other reporting packages.
- The report can be saved, and will be accessible to the user who saved it.

The view is also available in the list of tables and views on the ‘Data Sources’ tab of Enterprise Analytics Reporting.

TO CONFIGURE:
No configuration is necessary. The new report view will be automatically displayed on the ‘Create Custom Report’ page for all Production Tracking users. The new report view is also automatically displayed in the ‘Data Sources’ tab for customers with Enterprise Analytics Reporting enabled for their site.