

# Welcome to PMUG 2015

What's New! What's Coming Soon?

Tony Alves, Director of Product Management

[bit.ly/PMUG15-New](http://bit.ly/PMUG15-New)



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# Version 12.0

**Upgrades are underway!**

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# Customizable Grids

Editors want more control over how manuscript lists are displayed in their folders

SOLUTION: replace current static grids with new customizable grids:

- Reorder columns
- Hide columns
- Resize columns
- Freeze columns
- Fixed header

Grids with highest visibility and utility will be refactored first

# Customizable Grids

Search Submission: Editorial, Proposals, Production, Linked  
Optional - checkbox to enable “Beta Grid”

**Search submissions selection criteria**

Display search results in Beta grid





Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#)

Search Definition: Choose Saved Search ▼


[Help with Searching](#)      [Insert Special Character](#)      [Value Options](#)      [Advanced Criteria](#)

(	Criterion	Is/Is not	Selector	Value	)
▼	Manuscript Number	is	Contains		▼

# Customizable Grids

Quicklinks    

**Search Submissions - Search Results**

Page: 1 of 11 (1003 total submissions) 100 results per page. 

1
2
3
4
5
6
7
8
9
10
▶
▶▶

Action	Manuscript Number	Author Name	Article Title	Article Type	Reviewers
<a href="#">Action Links</a>	DEMO-100-46	Angie Author	Stacey Test Auth Invitation Stats	Commentary	
<a href="#">Action Links</a>	DEMO-100-47	Stacey Lavelle	Stacey Testing System Hang #3	Original Research	
<a href="#">Action Links</a>	DEMO-100-48	Jen Fleet	This is the full title	submission for special issue	
<a href="#">Action Links</a>	DEMO-100-49	Jenny Craig	Betsy Testing Other Authors 1/27/10	Betsy Article	
<a href="#">Action Links</a>	DEMO-100-5	Stacey Lavelle	Stacey Testing Reviewer Questionnaire Grid in Decision Letter on 10.1	Original Research	Rachel Reviewer * Ralph Reviewer, MD *
<a href="#">Action Links</a>	DEMO-100-50	Mary François Smith 1	Betsy is Testing Other Author Registration Requirements	Original Research	
<a href="#">Action Links</a>	DEMO-100-51	Mary François Smith 1	Other Author click only	Theory	
<a href="#">Action Links</a>	DEMO-100-52	Mary François Smith 1	Test of new submission letter	Original Research	
<a href="#">Action Links</a>	DEMO-100-53	Mister Woo	Misca Konglishka	Theory	
<a href="#">Action Links</a>	DEMO-100-54	Mary François Smith 1	Another test of CrossCheck	Original Research	

# Customizable Grids

- Quicklinks
- Editorial Menu
- Production Tasks Menu
- Production Status Grid
- Switch to Production View

Action	Manuscript Number
<a href="#">Action Links</a>	45
<a href="#">Action Links</a>	4565
<a href="#">Action Links</a>	ANS-04-01R1
<a href="#">Action Links</a>	ASCE-022812
<a href="#">Action Links</a>	DEMO MS NUMBE
<a href="#">Action Links</a>	DEMO-100-1
<a href="#">Action Links</a>	DEMO-100-10

**Grid Options**

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

Column Header	Fixed	Show
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manuscript Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Author Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reviewers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Classifications	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Current Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Status Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Initial Date Submitted	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Handling Editor	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Assigned Editors	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Section Category	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DOI	<input type="checkbox"/>	<input type="checkbox"/>
Short Title	<input type="checkbox"/>	<input type="checkbox"/>
Keywords	<input type="checkbox"/>	<input type="checkbox"/>

100 results per page.

Reviewers
Ron Reviewer, MD
Ann Reviewer *
Bean Reviewer *
Board Reviewer, MD *
Rhonda Reviewer, MD *
Robert Reviewer *
Roger Reviewer *
Ron Reviewer, MD *
Juliette Romero *
Rolls Royce *
123 123 *

Your Time: 10:58, 29 December • Site Time: 10:59, 29 December

# Customizable Grids

**Grid Options**

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

Column Header	Fixed	Show
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manuscript Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Author Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reviewers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Classifications	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Current Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Status Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Initial Date Submitted	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Handling Editor	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Assigned Editors	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Section Category	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DOI	<input type="checkbox"/>	<input type="checkbox"/>
Short Title	<input type="checkbox"/>	<input type="checkbox"/>
Keywords	<input type="checkbox"/>	<input type="checkbox"/>

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# New Merge Field for Author Questionnaire

Sometimes a publication wants to include just a portion of the Author Questionnaire in letters – for example, to allow an Author to review Co-Author answers

**SOLUTION: %AUTHOR\_QUESTIONNAIRE\_SUBSET%** -  
Inserts a subset of questions and responses from the Author Questionnaire into letters

Existing **%AUTHOR\_QUESTIONNAIRE%** merge field pulls questions and responses from the entire Author Questionnaire into letters



# New Merge Field for Author Questionnaire

## Configure Questionnaire

Enter a name for the Questionnaire in the 'Questionnaire Name' field. Custom Questions may be added to the Questionnaire by clicking the 'Add Custom Questions' button, selecting Custom Questions, and adding them to the 'Question Display Order' section. Questions may be reordered by entering a number in the 'Order' field and clicking the 'Update Item Order' button. Click the 'Save' button to save the Questionnaire and return to the Create Questionnaire page.

The %AUTHOR\_QUESTIONNAIRE\_SUBSET% merge field pulls in all of the selected Questions and Responses for all Authors on the submission (including the Corresponding Author). To specify questions/responses for inclusion in this merge field, select the checkbox in the 'Include in Merge Field' column for all questions you want to include. Note the %AUTHOR\_QUESTIONNAIRE% merge field continues to pull in all questions and responses for the questionnaire.

Questionnaire Name:  (50 characters maximum)

**Hide** When you **Hide** a Questionnaire, it will not be available for use with any Article Type.

Question Display Order:

Order	Question
<input type="text" value="1"/>	T&F submission question...
<input type="text" value="2"/>	Have you previously submitted your talk to a journal for publication?
<input type="text" value="3"/>	What is the name of your cat?

Required for Submission	Include in Merge Field	Actions
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Remove</a>

# New Merge Field for Author Questionnaire

Preview Letter - Ad Hoc from Editor

Cancel Print Send E-Mail

Dear Dr. Decker,

Please confirm the responses on the revised submission answered by each Co-Author.

#### Additional Information

1. Charlie Hansen, MD, PhD

Question	Response
What is your favorite restaurant?	Capital Grille
Please enter your favorite entrée.	
as follow-up to "What is your favorite restaurant?"	Fish
What is your favorite color?	Blue
Turquoise or Navy?	
as follow-up to "What is your favorite color?"	Turquoise
How many pages is the manuscript?	13
Do you have color images?	Yes

2. Ronald Decker, MD

Question	Response
What is your favorite restaurant?	Sal e Pepe
Please enter your favorite entrée.	
as follow-up to "What is your favorite restaurant?"	Pasta
What is your favorite color?	Blue
Turquoise or Navy?	
as follow-up to "What is your favorite color?"	Navy

3. Susan Daria, MD

Question	Response
What is your favorite restaurant?	Buffalo Wild Wings
Please enter your favorite entrée.	
as follow-up to "What is your favorite restaurant?"	Wings!!
What is your favorite color?	Red

Cancel Print Send E-Mail

When using these Merge Fields in letters, the questions and responses are grouped by Author

When the same question is asked on multiple revisions, the most recent response is displayed

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# New Merge Field for Author Information

**%ALL\_AUTHORS\_WITH\_SELECTED\_METADATA%** -  
Inserts a subset of data related to the Corresponding Author  
and all Co-Authors

Contents of merge field is configured on the *Set Other Author Parameters* page in PolicyManager

Co-Author data is pulled from the Submission record, not from a People record

May be used in any editorial or production letter

# New Merge Field for Author Information

## Other Author Parameters

Set "Title" Text Entry Box Preference:

First Name

Set "Secondary First Name" Text Entry Box Preference:

Set "Middle Name" Text Entry Box Preference:

Last Name

Set "Secondary Last Name" Text Entry Box Preference:

Set "Academic Degree(s)" Text Entry Box Preference:

Set "Secondary Academic Degree(s)" Text Entry Box Preference:

Set "Affiliation " Text Entry Box Preference:

Set "E-mail Address" Text Entry Box Preference:

Require unique e-mail addresses for all authors of a submission

Set "ISNI" Text Entry Box Preference:

Set "ORCID" Text Entry Box Preference:

Set "PubMed Author ID" Text Entry Box Preference:

Set "ResearcherID" Text Entry Box Preference:

Set "Scopus Author ID" Text Entry Box Preference:

Set "Position" Text Entry Box Preference:

Set "Secondary Position" Text Entry Box Preference:

Set "Institution" Text Entry Box Preference:

Set "Department" Text Entry Box Preference:

Set "Secondary Institution" Text Entry Box Preference:

Set "Secondary Department" Text Entry Box Preference:

Set "Street Address" Text Entry Box Preference:

		Include in Merge Field?
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Require	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Require	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Optional	<input type="checkbox"/>	<input type="checkbox"/>
Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Hidden	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Hidden	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Hidden	<input type="checkbox"/>	<input type="checkbox"/>
Hidden	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# New Merge Field for Author Information

## Preview Letter - Verify Co-Author Metadata

Cancel

Print

Send E-Mail

Dear Dr. Decker,

Please confirm the information entered for each Co-Author.

1. Dr. Charlie Hansen, MD, PhD  
E-mail Address: charlie@childrens.org  
ORCID: 0000-0001-5882-6823  
Position: Director of Laboratories  
Institution: Boston Children's Hospital  
Street Address: 300 Longwood Avenue  
City: Boston,  
State: MA  
Country: USA  
Equal Contribution Status: This Author is an equal contributor  
Post-Publication Corresponding Author: No

2. Mr. Ronald Decker, MD  
E-mail Address: ron@childrens.org  
ORCID:  
Position:  
Institution: Boston Children's Hospital  
Street Address: 300 Longwood Avenue, Fegan 11th Floor  
City: Boston  
State: Massachusetts 02115  
Country: USA  
Equal Contribution Status:  
Post-Publication Corresponding Author:  
Deceased Status: This Author is deceased

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# Insert Letter Template Merge Fields

For convenience, a Merge Field palette can be used to click and insert merge fields into letter templates in Policy Manager

Each merge field will include an in-line description with usage hints

# Insert Letter Template Merge Fields

Allow attachments

Letter Body: [Insert Image](#) | [Insert Custom Merge Field](#) | [Insert System Merge Field](#)

Ref.: Ms. No. %MS\_NUMBER%  
%ARTICLE\_TITLE%  
%JOURNALFULLTITLE%

Dear %TITLE% %LAST\_NAME%,

I am pleased to tell you that your work has now been accepted for publication  
in %JOURNALFULLTITLE%.


It was accepted on %FINAL\_EDITOR\_DECISION\_DATE%klklio/.

Comments from the Editor and Reviewers can be found below.

Thank you for submitting your work to this journal.

With kind regards

%EDITOR\_NAME%  
%EDITOR\_ROLE%  
%JOURNALFULLTITLE%




# Insert Letter Template Merge Fields

## Insert System Merge Fields

You can drag and drop merge fields from here to the letter Subject or Body. [\(more...\)](#)

Select a merge field name, or click the filter icon to select all matches:

edi X  [Expand All](#) | [Collapse All](#)

	Definition
%ACCEPT_EDITOR_INVITATION%	Inserts the Abstract, entered by the Author, into letters, such as the invitation letter that goes to Reviewers.
%COMMENTS_TO_EDITOR%	Available for use in Editor invitation letters generated via the Suggest Editor method. Inserts a hyperlink in a letter that automatically <a href="#">(more...)</a>
%CORR_ED_EDITOR_ROLE%	Inserts a hyperlink in a letter that automatically triggers the 'Author Agrees to Invitation' function in the system. The Author will be fully <a href="#">(more...)</a>
%DECLINE_EDITOR_INVITATION%	Inserts a hyperlink in a letter that automatically triggers the 'Agree to Review' function in the system. The Reviewer will be fully <a href="#">(more...)</a>
%EDITOR_DECISION%	Inserts the name of the Publication to which the submission has been transferred. For use in a letter configured for the 'Author Agrees <a href="#">(more...)</a>
%EDITOR_DEEP_LINK%	‡ Corresponding Editor's Address1
%EDITOR_MAIN_MENU_DEEP_LINK%	‡ Corresponding Editor's Address2
%EDITOR_NAME%	
%EDITOR_NEW_ASSIGNMENTS_DAYS%	
%EDITOR_NEW_ASSIGNMENTS_FOLDER_DEEP_LI	
%ACCEPT_REVIEW_INVITATION%	
%ACTUAL_TRANSFER_PUBLICATION_TITLE%	
%ADDRESS1%	
%ADDRESS2%	

‡ When a publication uses double-blind peer review, this merge field is not populated in the copy of the Notify Author letter presented to a Reviewer.



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# Hide Letter Templates

Some Letter Templates become outdated, or are just for temporary use – however, once created and used, they persist forever.

**SOLUTION:** Letter Templates can be hidden

- Hidden Letter Templates are no longer included in letter selection dropdowns
- Hidden Letter Templates can be reinstated
- Letter Purpose and Letter Family columns can be sorted

# Hide Letter Templates

## 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 To create a new letter, click 'Add New Letter'. ([more...](#))

[Back to PolicyManager](#)

Add New Letter

Save Changes

Edit Image Files for HTML Letters

Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	Text Format	HTML Format	All Formats
.01-Cancel Fee Letter to Author	Fees And Payments	<input checked="" type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
.01-Correspondence about Fee To Author	Invite/Assign/Unassign Editor	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
.01-Deny Waiver to Author	Fees And Payments	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
.01-Grant Waiver Letter to Author	Fees And Payments	<input checked="" type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
.01-Non-Submission Fees	Fees And Payments	<input checked="" type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
.01-Payment Due Letter to Author	Fees And Payments	<input checked="" type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
.01-Payment/Bill me Letter from Author	Enterprise Analytics Reporting	<input checked="" type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
00-Editor Notice of Alt. Reviewer Promotion	General	<input checked="" type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
0-Artwork Cancellation	Production	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
0-Artwork Completion	Production	<input checked="" type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
0-Assign Artwork Task	Production	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
0-Assign Task-Text Markup	Production	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
0-Copy Editing Completed	Production	<input checked="" type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>

# Hide Letter Templates

## 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 To create a new letter, cli

[Back to PolicyManager](#)

Add New Letter

Save Changes

Edit Image Files for HTML Letters

Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	Fe
.01-Cancel Fee Letter to Author	Fees And Payments	<input checked="" type="radio"/>
.01-Correspondence about Fee To Author	Invite/Assign/Unassign Editor	<input type="radio"/>
.01-Deny Waiver to Author	Fees And Payments	<input type="radio"/>
.01-Grant Waiver Letter to Author	Fees And Payments	<input checked="" type="radio"/>
.01-Non-Submission Fees	Fees And Payments	<input checked="" type="radio"/>
.01-Payment Due Letter to Author	Fees And Payments	<input checked="" type="radio"/>
.01-Payment/Bill me Letter from Author	Enterprise Analytics Reporting	<input checked="" type="radio"/>
00-Editor Notice of Alt. Reviewer Promotion	General	<input checked="" type="radio"/>

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# Search Manuscript Notes in Search Submissions

Manuscript Notes will be added to the Criterion drop-down list on the *Search Submissions Selection Criteria* page.

(Similar to existing search Production Notes functionality)

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## Manuscript Ingest – ProduXion Manager

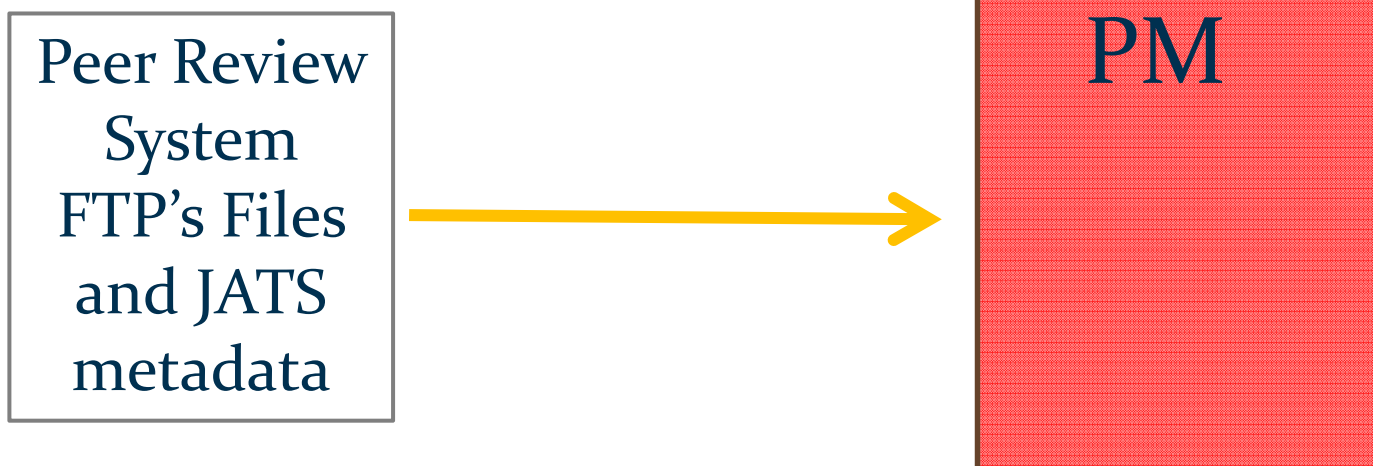
Some ProduXion Manager customers use non-EM peer review systems (believe it or not)

Today there are some proprietary import methods used to get papers from these other systems in to PM – but again – these are proprietary

SOLUTION: Aries has developed a “generic” method that anyone can use

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# Manuscript Ingest



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# Manuscript Ingest – ProduXion Manager

Submissions can be imported into ProduXion Manager from non-EM peer review systems

Data must be in XML, formatted to JATS 1.1 DTD

Data and files are FTP'd to PM

Submission is found in the *Production Initiated – No Tasks Assigned* OR, if a task is configured to be automatically assigned when production is initiated, *Production Tasks Assigned to Me/Submission Production Tasks I have Assigned* folders

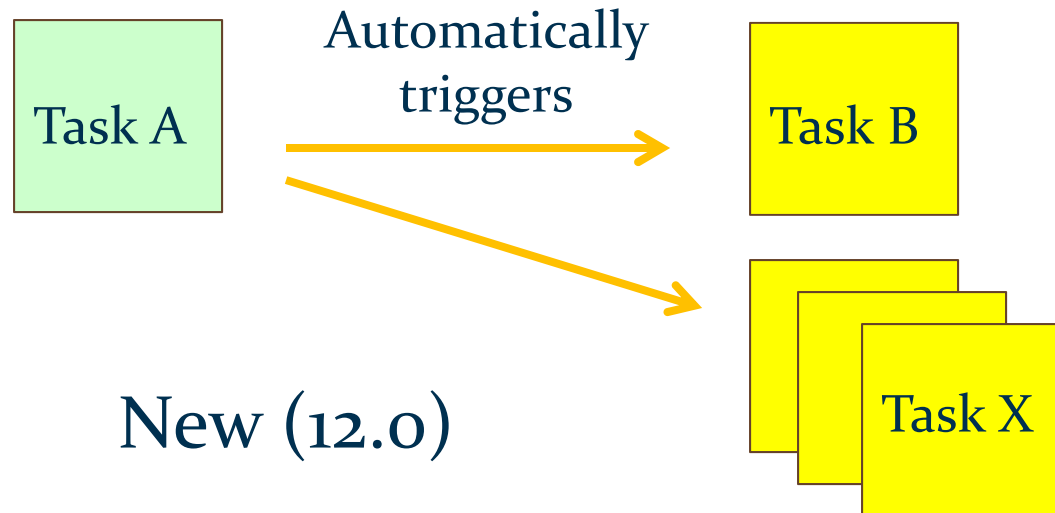
In all cases the submission appears in the *View All Submissions in Production* folder

# Additional Production Automation



Existing Functionality

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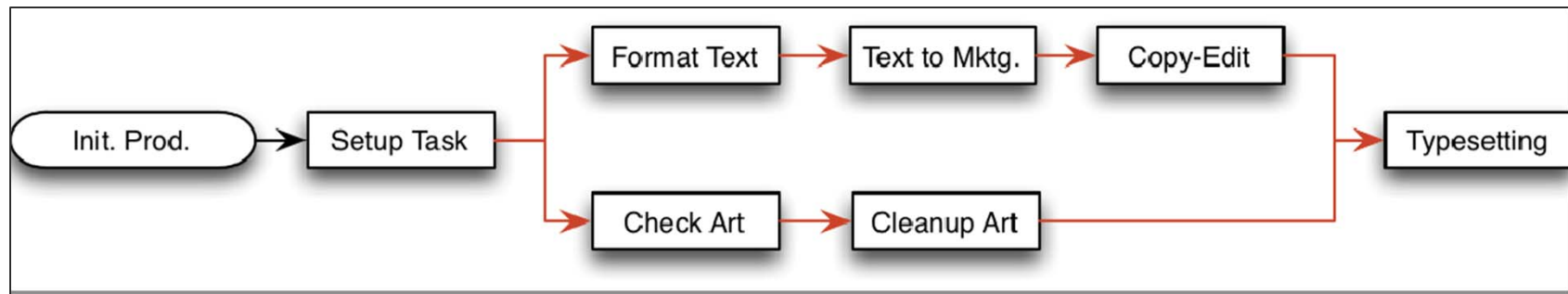


New (12.0)



# Additional Task Automation

Example automation:



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# Automated Production Reminders

*Automated Submission Tasks Reminder* (for production tasks related to submissions)

*Automated Schedule Group Tasks Reminder* (for production tasks related to Issues)

RoleManager permission for Editor and Publisher roles

Saved reports can be edited and deleted (by creator)

# Automated Production Reminders

## Automated Submission Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the **Automated Submission Tasks** reminder e-mails will be sent once every 24 hours to each recipient.

<b>Reminder Type:</b>	<input checked="" type="radio"/> <b>Outstanding Submission Production Tasks:</b> Send an automated reminder e-mail to users who were assigned a Submission Production Task <input type="text" value="7"/> days ago. If users have already completed their task, they will not receive a reminder.
	<input type="radio"/> <b>Reminder Before Selected Date Type:</b> Send an automated reminder e-mail to users whose open, assigned Submission Production Task is exactly <input type="text" value="10"/> days before the selected Date Type.
	<input type="radio"/> <b>Reminder Past Selected Date Type:</b> Send an automated reminder e-mail to all users whose open, assigned Submission Production Task is exactly <input type="text" value="7"/> days past the selected Date Type. To send reminders for tasks that are due on the day the reminder report is run, enter 0 days.
<b>Production Task:</b>	<input type="text" value="(All Production Tasks)"/>
<b>Schedule Group:</b>	<input type="text" value="(All Schedule Groups)"/>
<b>Reminder Name:</b>	<a href="#">Insert Special Character</a> <input type="text"/> <i>Maximum 200 characters</i>
<b>Reminder Letter:</b>	<input type="text" value="Please Choose an Automated Reminder Letter"/>

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

<b>Assigned To:</b>	<input type="text" value="Author"/> <input type="text" value="Copy Editor"/> <input type="text" value="Production Team"/> <input type="text" value="Associate Editor"/> <input type="text" value="Select All"/> <input type="text" value="Clear All"/>
<b>Article Type:</b>	<input type="text" value="Original Study"/> <input type="text" value="Brief Report"/> <input type="text" value="Editorial"/> <input type="text" value="Perspective"/> <input type="text" value="Select All"/> <input type="text" value="Clear All"/>
<b>Section/Category:</b>	<input type="text" value="Main Section"/> <input type="text" value="Letters to the Editor"/> <input type="text" value="Test Section"/> <input type="text" value="Hidden Section (hidden)"/> <input type="text" value="Select All"/> <input type="text" value="Clear All"/>

Save as Automated Reminder

# Automated Production Reminders

## Automated Schedule Group Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the **Automated Schedule Group Tasks** reminder e-mails will be sent once every 24 hours to each recipient.

<b>Reminder Type:</b>	<input type="radio"/> <b>Outstanding Schedule Group Production Tasks:</b> Send an automated reminder e-mail to users who were assigned a Schedule Group Production Task <input type="text" value="7"/> days ago. If users have already completed their task, they will not receive a reminder.
	<input checked="" type="radio"/> <b>Reminder Before Selected Date Type:</b> Send an automated reminder e-mail to users whose open, assigned Schedule Group Production Task is exactly <input type="text" value="10"/> days before the selected Date Type.
	<input type="radio"/> <b>Reminder Past Selected Date Type:</b> Send an automated reminder e-mail to all users whose open, assigned Schedule Group Production Task is exactly <input type="text" value="7"/> days past the selected Date Type. To send reminders for tasks that are due on the day the reminder report is run, enter 0 days.
<b>Date Type:</b>	<input type="text" value="Schedule Group Production Task Due Date"/>
<b>Production Task:</b>	<input type="text" value="(All Production Tasks)"/>
<b>Schedule Group:</b>	<input type="text" value="(All Schedule Groups)"/>
<b>Reminder Name:</b>	<a href="#">Insert Special Character</a> <input type="text"/> <i>Maximum 200 characters</i>
<b>Reminder Letter:</b>	<input type="text" value="Please Choose an Automated Reminder Letter"/>
<p>You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.</p>	
<b>Assigned To:</b>	<input type="text" value="Author"/> <input type="text" value="Copy Editor"/> <input type="text" value="Production Team"/> <input type="text" value="Associate Editor"/> <a href="#">Select All</a> <a href="#">Clear All</a>




Save as Automated Reminder

# Automated Production Reminders

## Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them.

Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the 'Drag & Drop' tool.

	Reminder Name	Reminder Type	Number of Days	Reminder Creator
 	Open Production Tasks Assigned 10 days ago	Outstanding Submission Production Tasks	10	Mary Smith, MD
 	Submission Task Due in 10 days from SG Target Online Pub Date	Reminder Before Schedule Group Target Online Publication Date	10	Joe Sample, MD

---

## Cancel Tasks – Closing Schedule Groups

Completing the production process can be burdensome because all Submission Production Tasks must first be closed manually

**SOLUTION:** When closing an Issue (schedule group) the user can automatically close all open Submission Production Tasks

RoleManager permission for Editor and Publisher roles

# Cancel Tasks – Closing Schedule Groups

The "Seahorses English Issue" Schedule Group has open production tasks associated with it:

- 3 Submissions have open submission production tasks.
  - Click this [Production Status Grid](#) link to cancel the Close Group process and switch to a list of the production tasks associated with this Schedule Group.
- 2 Schedule Group Production Tasks are still in progress.
  - Click this [History](#) link to display information for this Schedule Group.

To cancel these tasks automatically and close the group, click one of the following buttons depending on whether you want to send cancellation letters. Submissions that have no open tasks but are still in production will have production ended on them.

Close Group and Send Letters

Close Group without Sending Letters

To leave the group open without cancelling any tasks, click 'Do Not Close Group'.

Do Not Close Group

---

## Search Submission – Publisher Role

Users with a Publisher Role can Search Submissions, with the following restrictions:

- Submission Final Disposition is Accept and/or the Submission is “In Production”
- Publisher has appropriate RoleManager permissions controlling which Criteria and Action Links are displayed



---

## Search Submission – Publisher Role

Publisher Roles can Save Searches with the following restrictions:

- Only able to view searches saved from their Publisher Role when logged in as Publisher
- Able to publish Searches as links on their own Publisher main menu
- Publisher Roles cannot Share their Saved Searches at all
- Editors cannot share their Saved Searches with Publisher Roles

---

# Version 12.1

**Beta begins next week!**

**Upgrades September/October**

---

## Detailed People Notes

New People Notes feature – “Detailed People Notes”  
(existing People Notes field is still available)

- Each note identifies the user who entered the note, and the date and time of entry – 4000 character limit
- RoleManager permissions allows Editor to view, add and remove notes
- Notes are automatically saved; deleted notes cannot be restored
- Notes can be searched in Search People, Search Authors, and Search Reviewers
- Notes are available in Reports

# Detailed People Notes






## Detailed People Notes

Add New Note: 

Character Count: 0 / 4000

Submit Note

View/Print All

Operator ▲▼	Note	Date ▲▼	Action
Twink E. Jonesey, PhD	Ginger has changed institutions.	Sep 1 2014 03:07PM	
Mary Jones, PhD	He is up for election to at least 2 more boards.	Aug 18 2014 12:07PM	
Jack Bauer, BB	Ginger is on about 6 boards that I know of.	Aug 17 2014 03:06PM	
Mary Jones, PhD	Do you have any idea how busy Ginger is currently? I had heard that he was going <a href="#">(more...)</a>	Aug 16 2014 03:06PM	
Jack Spratt	What do you think about making Ginger our prime contact for our new project?	Aug 03 2014 03:07PM	

Display this section at the top of this page

---

## Detailed People Notes – Portal-Shared

Detailed People Notes can be made available across a “sharing group”

Each note identifies the user who entered the note, the date and time of entry, AND the publication on which the note was made

RoleManager permissions allows Editor to view, add and remove notes across publications

---

## Detailed People Notes – Portal-Shared


Detailed People Notes are synchronized when sharing is established

Not all publications in the group have to share – it is a 2-way agreement


When sharing stops, all existing notes from other publications persist, but no new notes are propagated






# Detailed People Notes – Portal-Shared

**Detailed People Notes**

Add New Note: 

Character Count: 0 / 4000 Submit Note

Filter By: All Publications  View/Print All

Publicat	note	Date	Action
ASC	Ginger has changed institutions.	Sep 1 2014 03:07PM	
JERS	Mary Jones, PhD He is up for election to at least 2 more boards.	Aug 18 2014 12:07PM	
ASC	Twink E. Jonesey, PhD Ginger is on about 6 boards that I know of.	Aug 17 2014 03:06PM	
JERS	Mary Jones, PhD Do you have any idea how busy Ginger is currently? I had heard that he was going (more...)	Aug 16 2014 03:06PM	
JERS	Mary He's had a rough year, what with the other one	Aug 19	

Display this section at the top of this page

---

## Shared Letters

Publishers with more than one publication using Editorial Manager or ProduXion Manager have to add or edit each letter template on each EM/PM site

- Standard wording required across all publications
- Change to signature, address, etc.
- New process that requires a new letter

It would be more convenient if letter templates could be added/edited in one place



---

# Shared Letters

Master site can push letters to Subscriber sites

Master site controls:

- Body
- Subject
- Format (text/HTML)
- To/From
- Purpose
- Allow Attachments

Subscribers can edit:

- To/From
- Purpose
- Allow Attachments

All letters are initially set to “Hidden”

# Shared Letters

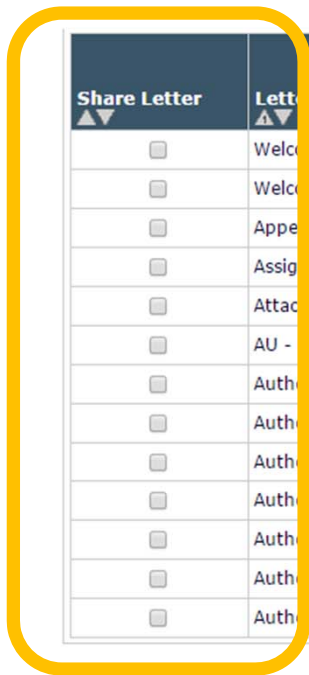
Master site can add or remove subscriber sites

Publication Code	Publication Title	Terminate Subscriber Relationship
DEMO112B	Journal of Demonstration1	<a href="#">Select All/ Clear All</a> <input type="checkbox"/>
DEMO112A	Journal of Research and Development	<input type="checkbox"/>
DEMOCLONE1	Journal of Interesting Studies	<input type="checkbox"/>
DEMOCLONE2	Journal of New Information	<input type="checkbox"/>
DEMOCLONE3	Survey of Medical Research	<input type="checkbox"/>

Additional Subscriber site (enter Publication Code):

# Shared Letters

Master site designates shared letters to push



Share Letter ▲▼	Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format		HTML Format		All Formats
<input type="checkbox"/>	Welcome1	General	<input type="radio"/>	<a href="#">Edit</a>	<input checked="" type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Welcome 2	General	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Appeal Reject Decision	Ad Hoc from Author	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Assign Production Task	Production	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Attachments to Author	Ad Hoc From Editor	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	AU - Notice that Associate Editor was assigned	Invite/Assign/Unassign Editor	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author - return submission	Communications to Author	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Approve Changes	General	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Corrections	Production	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Instructions and Due Date	General	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Invitation	Communications to Author	<input type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Invitation for Commentary	Author Invitation	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>
<input type="checkbox"/>	Author Invitation for Proposal	Author Invitation	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>   <a href="#">Hide</a>

Hidden Letters							
Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format		HTML Format		All Formats	
Welcome letter to be hidden	General	<input checked="" type="radio"/>	<a href="#">Edit</a>	<input type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>	<a href="#">Restore</a>
None	General	<input type="radio"/>	<a href="#">Edit</a>	<input checked="" type="radio"/>	<a href="#">Edit</a>	<a href="#">Remove</a>	<a href="#">Restore</a>

# Shared Letters

Subscriber site “un-hides” shared letters and can replace existing configured letters with shared letters

Replace with Shared Letter	Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format	HTML Format	All Formats
<input type="checkbox"/>	Welcome 1	General	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>
	Welcome 2 <span style="color: green;">S</span>	General	<input type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>
<input type="checkbox"/>	Appeal Reject Decision	Ad Hoc from Author	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>
	Author Invitation <span style="color: green;">S</span>	Communications to Author	<input type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>
	Author Invitation for Proposal II <span style="color: green;">S</span>	Author Invitation	<input type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>
<input type="checkbox"/>	Author Notice Editor Made Changes to Submission	Communications to Author	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>
<input type="checkbox"/>	Author Notice Journal Office Removes Submission	General	<input type="radio"/> <a href="#">Edit</a>	<input checked="" type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>
			<input type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>
			<input type="radio"/> <a href="#">Edit</a>	<input type="radio"/> <a href="#">Edit</a>	<a href="#">Remove</a>

Letter Purpose	Letter Family	Replace with:
Welcome 1	General	<span style="color: red;">Please Choose</span> ▼
Appeal Reject Decision	Ad Hoc from Author	<span style="color: red;">Please Choose</span> ▼
Assign Production Task	Production	<span style="color: red;">Please Choose</span> ▼
Attachments to Author	Ad Hoc From Editor	<span style="color: red;">Please Choose</span> ▼
AU - Notice that Associate Editor was assigned	Invite/Assign/Unassign Editor	<span style="color: red;">Please Choose</span> ▼
Author - return submission	Communications to Author	<span style="color: red;">Please Choose</span> ▼
Author Approve Changes	General	<span style="color: red;">Please Choose</span> ▼
author corrections	Production	<span style="color: red;">Please Choose</span> ▼

---

## Revision Number in PDF File Names

View Submission action link allows user to download PDF

When there are revisions, the action link will give the user an option to download the PDF of the initial submission, or any of the revised versions

PROBLEM – all files have the same file name

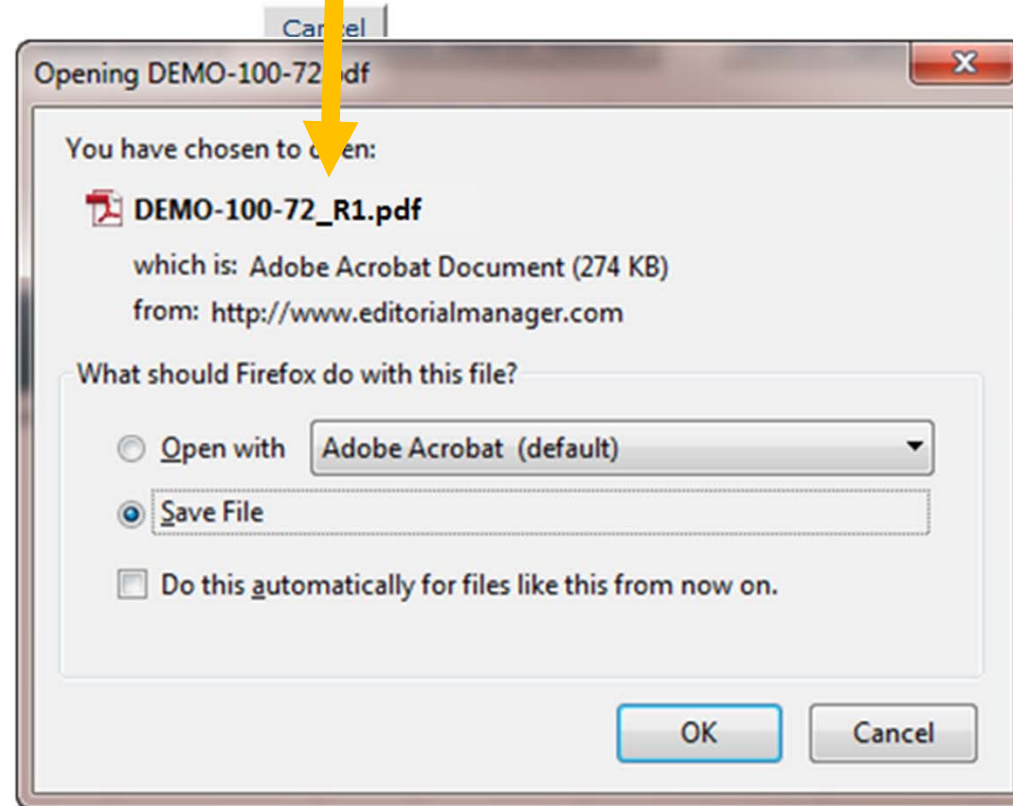
SOLUTION – files names will now contain revision number

# Revision Number in PDF File Names

## Select a Revision

[View Revision 1](#)

[View Original Submission](#)



---

# Version 12.2

**With Engineering**

**Beta scheduled to begin October/November**

**Upgrades February/March 2016**

---

# Flag History

Many publications use flags to indicate that an “outside” process has started or is underway

It would be useful to track time spent on these various activities


**SOLUTION:** The system will keep track of Flag actions


- Date Flag is turned on and off
- Operator who turned flag on and off
- Number of days flag was turned on
- Available in *History*, via *Details* and from *Set Flags* page
- RoleManager Permission required to view history



# Flag History

Each Submission Flag has its own “Display in History” setting

**Flag Icon:** 

**Original Flag Icon:** 

**Flag Name:**  [Insert Special Character](#)  
Maximum 256 characters

**Flag Type**  
 Editorial  
 Production

**Associate with AMD Field**

- Display in History** When this checkbox is selected, the flag history is displayed for users with permission to 'View Submission Flag History'.
- Hide** When you hide a flag, the flag cannot be turned on for new submissions, but will continue to display on existing submissions (until it is turned off by a user with appropriate permission).
- Turn off flag throughout the system** When you turn off a flag throughout the system, the flag will be removed from all submissions to which it was attached.



# Flag History

Submission Flag History is accessed from:

- *Status History* (Editorial and Production)
- *Correspondence History* (Editorial and Production)
- *Set Submission Flag* page
- *Flag Legend* page

SUBMISSION FLAG HISTORY							
Flag	Flag Name	Revision	Date Turned On	Operator	Date Turned Off	Operator	Days
<input checked="" type="checkbox"/>	Subscan Complete	1	Jan 28, 2015 3:35 PM	James Miller, PhD			(6)
!	Potential Subscan Issue	1	Jan 25, 2015 2:00 PM	James Miller, PhD	Jan 28, 2015 11:12 AM	Stacey Lavelle	3
2	Ed Office, Rebecca Bye	1	Jan 25, 2015 11:40 AM	Rebecca Bye			(9)
o	Open subscan discussion	1	Jan 16, 2015 8:29 AM	Xianchun Wang, PhD	Feb 3, 2015 12:00 PM	Xianchun Wang PhD	18
!	Potential Subscan Issue	0	Dec 17, 2014 2:00 PM	James Miller, PhD	Dec 23, 2015 11:12 AM	James Miller, PhD	6
o	Sent Back to Authors	0	Nov 13, 2014 10:13 AM	Rebecca Bye	Nov 18, 2014 11:00 AM	Rebecca Bye	5

---

# Letter Improvements

People want a quick way to send informal reminders and follow ups, particularly while in Details.

SOLUTION: Send Ad Hoc Email from Details – icon appears next to names

- Clicking name opens *Customize E-Mail* page
- Recipient and sender fields auto-populate
- Subject, cc, bcc and body are empty
- Ad Hoc letter compliant merge fields can be used
- Attachments are allowed
- Saved in *Correspondence History*

---

# Letter Improvements

Managing Letters can be a hassle. Recent updates have included “Letter Hiding” and “Letter Sorting”.

Understanding how and where letters are being used would also be helpful!

**SOLUTION:** New ActionManager Roles and Events column is added to the *Edit Letters* page. This lists all combinations of Role and ActionManager Events for which the associated Letter Template has been selected.

# Letter Improvements

## 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. [\(more...\)](#)

[Back to PolicyManager](#)

Add New Letter

Save Changes

Edit Image Files for HTML Letters

Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	ActionManager Roles and Events	Text Format	HTML Format	All Formats
Editor Agrees to Handle Assignment	General	<a href="#">Section Ed</a> - Editor Agree to Assignment	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Editor Assignment	Invite/Assign/Unassign Editor	<a href="#">Associate Editor</a> - Editor Assigned (Not Invited) <a href="#">Editor-in-Chief</a> - Editor Assigned (Not Invited)	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Editor Assignment Undone	Invite/Assign/Unassign Editor	<a href="#">Associate Editor</a> - Editor Unassigned <a href="#">Section Editor</a> - Editor Unassigned	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Editor Decision - Accept	Decision		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Editor - Notice of Withdrawn submission	General	<a href="#">Associate Editor</a> - Final Disposition - Withdrawn <a href="#">Editor-in-Chief</a> - Final Disposition - Withdrawn <a href="#">Journal Office</a> - Final Disposition - Withdrawn <a href="#">Section Ed</a> - Final Disposition - Withdrawn	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>
Editor Initiate Author Rebuttal	General	<a href="#">Editor-in-Chief</a> - Initiate Rebuttal <a href="#">Journal Office</a> - Initiate Rebuttal	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove</a>   <a href="#">Hide</a>

---

# Letter Improvements

Email correspondence is a major element of EM/PM and sending compelling and visually appealing letters can assist in getting attention and increasing compliance.

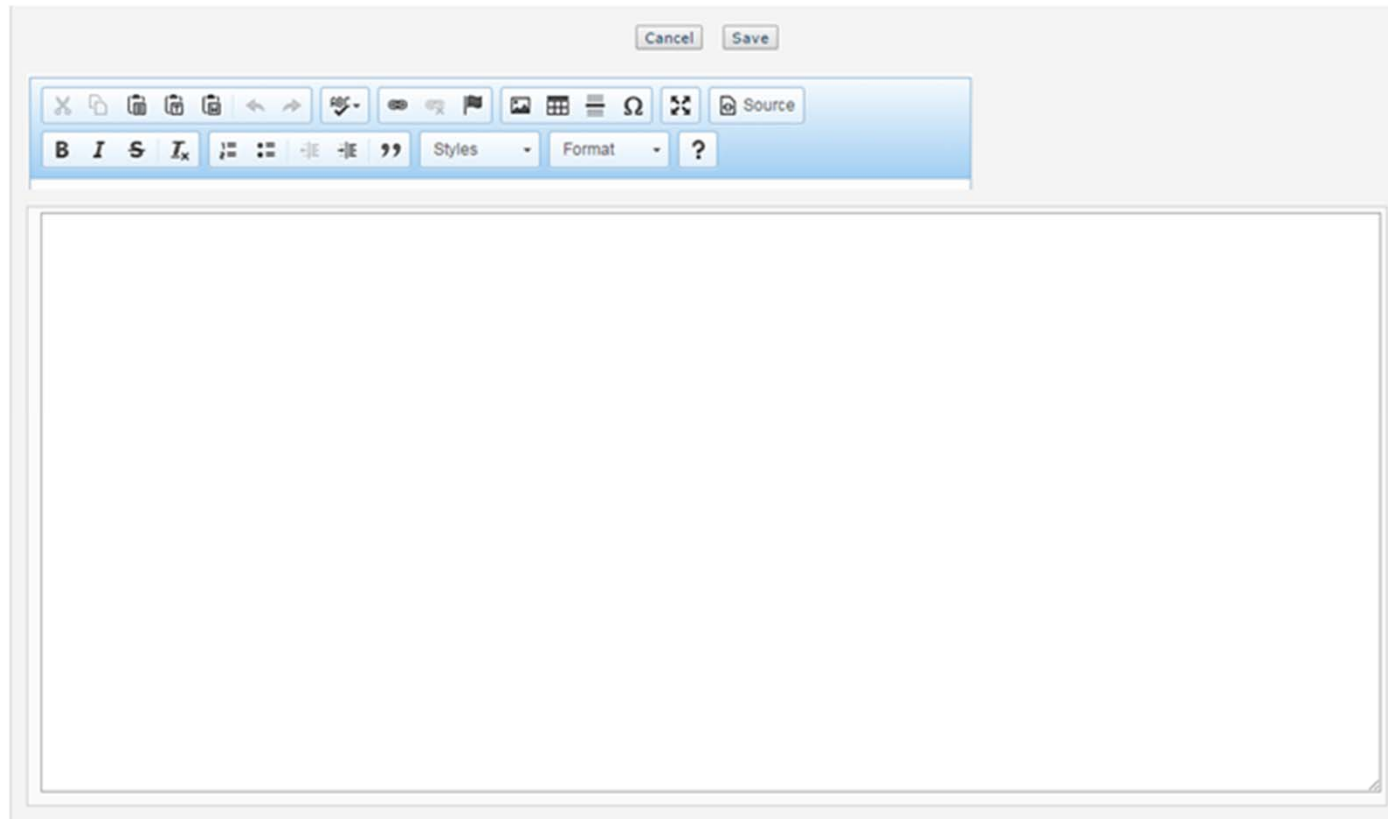
Current HTML letter configuration required knowledge of HTML mark up.

**SOLUTION:** A new tool that allows letter editing using rich text formatting is added to letter templates and editing screens.

---

# Letter Improvements

A new tool that allows letter editing using rich text formatting is added to letter templates and editing screens.



# Letter Improvements

## Customize Letter - Ad hoc letter from editor to author

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

From: "Ed Editor" <cwebber@ariessc.com>

To: Corresponding Editor;

Multiple addresses may be entered, separated by a semicolon


Letter Subject:

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

cc:

Attachments:

Letter Body:



# here is some comment text

Dear %GREETING%,

Here are some merge fields:

- %AUTHOR\_QUESTIONNAIRE% - This merge field includes any question presented to the Corresponding Author on the 'Additional Information' step of the Submission process. These questions may be Submission Questions or Author Questions.
- %OTHERAUTH\_VERIFY\_DEEP\_LINK% - when Co-Author Questionnaires are being used, expiration depends on the level of verification configured for the Article Type:
  - o Verify only -the deep link expires after the Co-Author clicks on the [Submit to Publication] button on the Contributing Authorship Questionnaire page.
  - o Register and Verify - the deep link expires after the Co-Author successfully logs in to the system from the login page presented after clicking on the deep link AND submits the questionnaire.
- %OTHERAUTH\_DECLINE\_DEEP\_LINK% - the decline deep link expires after it is clicked.
- o NOTE: If a Co-Author clicks the deep link generated by the %OTHERAUTH\_DECLINE\_DEEP\_LINK% merge field, and has previously saved responses to a Questionnaire, any saved responses are deleted.



---

# Power Grid Expansion

Grid configuration will be saved the Saved Search – this means that results for Saved Searches can have layouts that are best suited to the purpose of the search

- Different Saved Searches can have different Result Layouts
- Shared Saved Searches can have custom Result Layouts
- Subsequent layout changes do not propagate unless saved as new search

---

# Proxy Register Changes

## Tightened controls and unique requirements for Proxy Registration of users by Editors

- Editors can be forced to supply required data
- Required items for Proxy Registration can be different than items for Self Registration
- Proxy registration can be completed on a single screen

# Proxy Register Changes

## Tightened controls and unique requirements for Proxy Registration of users by Editors

### Register and Select New Reviewer

Please enter key information about the person you are registering as a Reviewer.

[Insert Special Character](#)

**E-mail Address \***

If entering more than one e-mail address, use a semi-colon between each address (e.g., joe@thejournal.com ;joe@yahoo.com )  
Entering a second e-mail address from a different e-mail provider decreases the chance that SPAM filters will trap e-mails sent to you from online systems. [Read More.](#)

**Given/First Name \***

**Family/Last Name \***

[Insert Special Character](#)

**Required Information**

**Reviewer Role \***

Default Login Role: Reviewer

**Country \***

**Additional (Optional) Information**

---

# Version 13.0

**Specification are being written**

**Beta scheduled to begin March/April 2016**

**Upgrades July/August 2016**

---

# Authorship and Attribution

The order of authorship in the case of multi-authored works has no generally agreed upon truth or meaning, and typically does not clarify the contribution to the research in question.

Multi-authorship, especially in the sciences, is increasingly the norm, and the number of authors per paper is growing

SOLUTION:



# Authorship and Attribution

**Enter Author Details** Open Special Character Palette

Given/First Name\* June  
Middle Name  
Family/Last Name\* Austen  
Academic Degree(s)  
Affiliation  
E-mail Address\* jausten@jausten.com  
ORCID  Fetch  
[What is ORCID?](#)  
Institution  
Department  
City  
State  
Zip or Postal Code  
Country\* UNITED STATES

**Contributor Roles\*** Instructions

- Conceptualization
- Data curation
- Formal analysis
- Funding acquisition
- Investigation
- Methodology
- Project administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing - original draft
- Writing - review & editing

**Contributor Roles\*** Instructions

- Conceptualization
- Data curation
- Formal analysis
- Funding acquisition
- Investigation
- Methodology
- Project administration
- Resources
- Software
- Supervision
- Validation
- Visualization
- Writing - original draft
- Writing - review & editing

Select degree   
Select degree  
Lead  
Supporting  
Equal

# Authorship and Attribution

## Configure Contributor Roles

Contributor Roles can be attributed to each Author of a submission. On this page, you may choose your version of the taxonomy, specify the metadata to be collected, and define the custom instructions to be displayed to users when attributing roles. Then on the *Set Other Author Parameters* page, you can specify whether to collect Contributor Roles for your publication (along with the other parameters for Authors). Then on the *Edit Article Type* page, you can specify whether Contributor Roles are Required or Optional for an Article Type.

For more information on Contributor Roles and Project CRediT, click here: <http://credit.casrai.org>

### Set Taxonomy Version

Select a version of the CRediT Taxonomy's Contributor Roles from the dropdown menu.

Choose Taxonomy: None

### Select Additional Metadata to be Collected

The following options allow you to specify whether to collect a Degree of Contribution for each Contributor Role assigned to an Author, and whether to display a text box to allow the Corresponding Author to enter a name description of a role that is not in the taxonomy.

- Collect 'Degrees of Contribution'
- Display "Other" field for free-text entry of a role name

### Edit Instructions

Enter any instructions that you would like to appear when a user clicks the 'Instructions' link while editing the Contributor Roles for an Author.

Area	Instructions
Contributor Roles Instructions	<p><a href="#">Insert Special Character</a></p> <p>The roles listed are from the CRediT Taxonomy, a classification standard used to ensure that Authors are credited for their contributions toward published scholarly works. Please visit <a href="http://credit.casrai.org">http://credit.casrai.org</a> for more information.</p> <p>You may select one or more Contributor Roles for each Author of a submission.</p> <p><a href="#">View Default Instructions</a>      <a href="#">Revert to Default Instructions</a></p>

## 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. ([more...](#))

### Other Author Parameters

#### Include in Merge Field?

Set "Title" Text Entry Box Preference: Hidden

Given/First Name Required

*Part of page omitted*

Set "Country" Text Entry Box Preference: Required

Set "Contributor Roles" Preference: Hidden

Set "Deceased Status" Text Entry Box Preference: Display

Set "Equal Contribution Status" Text Entry Box Preference: Display

Set "Post-Publication Corresponding Author" Text Entry Box Preference: Display

---

# Proxy as User after Proxy Registering Them

An Editor or staff proxy registers a new user, such as a new Associate Editor or a Guest Editor. S/he must then find that new record in Search People in order to proxy in as them to accept an assignment.

**SOLUTION:** New option allows person doing the proxy registering to immediately log in as that new person.



# Proxy as User after Proxy Registering Them



**Proxy Registration Complete Confirmation**

You have successfully registered Teddy Tester [user@domain.com].

Proxy as: **Author** **Reviewer**

[Editor Main Menu](#)

Restriction: Not available following Author or Reviewer proxy registration, as this would interrupt the invitation/assignment workflow.

---

## ORCiD Authenticate Deep Link

Publications need to be sure all of the people in their database are disambiguated so that effective communication can happen between various systems – like peer review, society membership, publishing platforms, granting agencies, repositories, etc.

SOLUTION: The word "ORCiD" is displayed in a sans-serif font. The letters "OR" are grey, "C" is light green, "i" is dark green with a dot, and "D" is light green.

A new deeplink will allow users to check that their ORCiD is authenticated, and allow them to get an authenticated ORCiD if they don't have one.

---

# Trigger APC API – Payment Due in Production Tracking

Publications using the APC API to collect OA fees are also interested in using the same mechanism to collect other sorts of fees, such as page charges, color charges, reprints, etc. Relevant data for some of these items are often not available until the production process is underway.

**SOLUTION:** The APC API is enhanced to allow publications the freedom to charge multiple fees during the production process.

Production Tasks are used to trigger fee requests.

# Trigger APC API – Payment Due in Production Tracking

## Configure APC Processing

Select the event that will trigger a Payment Request for Publication Charges.

If 'None' is selected, a Submission Production Task must be configured to trigger the 'Payment Due' call. If an Editorial event is selected to trigger the initial call, subsequent Payment Due calls may be triggered as Submission Production Tasks. The task may be assigned manually or automatically.

The instructions to Authors that is displayed on the optional and required 'Publication Charges' pages may be customized.

Either 'Optional' or 'Required' must be selected in the 'Apply Publication Charges' dropdown menu on the 'Edit Article Type' page in order for the Author to see either the optional or required 'Publication Charges' page.

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

Notify Author of selected decision(s):

Please select Decision Term(s)

- Accept
- Revise
- Revise, No Review

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

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

### Prevent Submission if the Author does not view the Publication Charges

Select this checkbox to prevent Authors from submitting a manuscript if the Payment System is unavailable or the Author does not view the Publication Charges. Authors will be able to continue editing the submission, but will not be able to submit the manuscript to the Editorial Office.

Prevent submission if the Payment System is unavailable

### Customize Publication Charges Instructions for the Author

Area	Instructions
------	--------------

# Trigger APC API – Payment Due in Production Tracking

## Edit Submission Production Task

Cancel

Submit

[Insert Special Character](#)

New Production Task Name:

Trigger Publication Charges Due

*Maximum Production Task Name is 100 characters*

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

### Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assigner and a specific user to receive the task. You should also configure

*Part of page omitted*

Production Task Assignment can be configured to also trigger a Publication Charges Payment Due letter and associated status change; this may be in addition to the initial trigger that occurs when the Author is notified of a selected decision or when the Final Disposition is set to Accept.

- Trigger 'Publication Charges Payment Due'
- Do not trigger if APC Status is already 'In Process' or 'Complete'
- Do not trigger on Repeated Assignment of this Task

Letter Options:

- Trigger all ActionManager 'Publication Charges Payment Requested' letters
- Send  letter to the Corresponding Author only

# Trigger APC API – Payment Due in Production Tracking

## Configure Submission Workflow

This workflow contains the master list of all defined Submission Production Tasks, and is the default workflow initially associated with all Article Types.

Use 'Add New Task Type' here to add a new Submission Production Task Type to the system for use in all Workflows. Unused Task Types may also be removed from the system using the remove icon (🗑). The Task Order defined here applies primarily to this workflow alone, but is also used by the Production Status Grid.

The [Edit] link modifies the master Task Type configuration, affecting all workflows. The edit icon (✍) modifies Automatic Task Assignment settings affecting only this workflow (you must first configure the Task Type to allow Automatic Task Assignment when Trigger Tasks are submitted).

Workflow Name: All Submission Production Tasks

Order	Task Type (◆=Milestone)	Assign if First Task	Trigger Publication Charges	Trigger Task(s)	Allow Repeats
1	Copy Edit [Edit]	✓			
2	Edit Graphics [Edit]		✓	Copy Edit	✓
3	Composition [Edit]		✓		
4	Author Proof [Edit]	(✓)	✓	Composition	
5	Final Files to Print [Edit]		✓		
6	Final Files to Online Posting [Edit]		✓		
🗑 7	◆Trigger Publication Charges Due [Edit]	(✓)	✓	Final Files to Online Posting	✓

Maximum Production Task Name is 100 characters

[Return to Configure Workflows and Tasks](#)

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# APC API Can Include Data from Custom Questions

Publications using the APC API to collect OA fees sometimes need to pass non-standard information along to the payment system. For example, there may be a society membership number that allows for a discount

**SOLUTION:** The APC API is enhanced to include the data collected in the Submission Questionnaire feature, which is part of the manuscript submission process. This allows for the collection on non-standard data to be passed to third party payment systems.

# APC API Can Include Data from Custom Questions

**Edit Custom Question**

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented as part of submission, author verification or production task completion.

[Open Special Character Palette](#)

**Initial Question**

Question text:  
Do you have color figures?

Instructions for Author Response:

*Part of page omitted*

**Integration Options**

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Include in APC API Call

Custom Metadata ID ⓘ

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

<p><b>PDF Cover Page</b> ⓘ</p> <p><input type="checkbox"/> Display</p>	<p><b>Manuscript Details</b></p> <p><input checked="" type="checkbox"/> Display</p> <p>Help Text: <input type="text"/></p>	<p><b>Transmittal Form</b> ⓘ</p> <p><input checked="" type="checkbox"/> Display</p> <p><input type="checkbox"/> Editable</p> <p><input type="checkbox"/> Required</p> <p>Help Text: <input type="text"/></p>
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# THANK YOU!

Tony Alves

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# SHAPES



Submission Items can be configured to:

- Display
- Display
- Not display