Aries Industry Advisory Board

Date: **September 7, 2023**
Time: **8:30am – 10:00am ET**
Location: **Zoom**

Attendees:
Aries Systems: Jennifer Fleet, Brianna Bowen, Pierre Montagano, Bill Reuschlein, Ryan Walther, Nathan Westgarth
Industry: American Chemical Society, American Society of Civil Engineers, Nature, New England Journal of Medicine, PLOS, Sage Publishing, Taylor & Francis, Sage, Sciendo, Springer, University of Chicago Press, Wolters Kluwer, World Scientific

The meeting commenced at 8:34am US – Eastern. Jennifer Fleet, Managing Director—Aries Systems called the meeting to order and welcomed the board members, thanking them for their time and participation. We then went around the "room" and shared introductions.

Jennifer then reviewed the Ground Rules for the Board and the meeting, including legal guidance and participant guidelines.

She continued with an Aries Business Update covering the following topics:
- Annual EM/PM submission trends
  - Aries saw a bump in submissions in 2020 due to COVID-19 followed by a bit of a dip. We are now seeing a bounce back in 2023 as numbers are just starting to rise above the peak seen in 2020.
    - This trend seems to be a shared experience among members of the board who are tracking this information.
  - Benchmarked against 2019 we have over 9000 publications using EM/PM.
  - Aries is not necessarily seeing a jump in journal count but more so in the number of submissions.
- Visits from China
  - These visits continue to dominate the page views, followed by the US, India, and the UK, no major shifts.
- Return to in-person Editorial Manager User Group (EMUG) meeting
  - First in-person meeting in 3 years was held in June 2023.
  - 116 attendees – most from US but we also had attendees from as far as Japan.

- o Attendance was slightly lower than pre-pandemic numbers. We anticipate having higher rates in 2024.
  - o The format was changed a bit as far as group discussions and workshops to encourage targeted feedback on strategic development areas.
  - o For the first time we had a UI/UX station at EMUG, which was very successful. Our designer was able to gain insights and collect user data
  - o Christopher Keannelly, Senior Director of Content Marketing at CCC, was the keynote who spoke about AI and the benefits and challenges that AI possesses. He has since turned his keynote into blog posts and an article recently published in the Boston Business Journal.

- • Business Continuity
  - o Recent Flooding at the North Andover Office
  - o No disruption or impact on our customers or internal teams due to the work we've done to migrate both customer-facing and internal systems and hardware out of the physical office.
    - ▪ No impact to productivity and access which is a direct result of leveraging Elsevier resources and best practices
  - o Question: How is Aries working with Elsevier on business continuity?
    - ▪ Jennifer responded stating we are not sharing any customer or user data only tooling and support resources and following shared best practices.

- • Bill Reuschlein, Senior Director of Operations, introduced himself and presented on the cloud migration:
- • Why moving to the cloud matters?
  - o We want to have our technical teams focusing on innovation and delivery, rather than the cumbersome activities related to data centers and hardware.
  - o With the Cloud technology we are able to scale our application based on load and we don't need to rely on hardware
  - o Major focus on stability. As traffic fluctuates, we can automatically adjust our servers based on needs to ensure EM/PM is responsive and available to our customers
  - o Enhanced focus on automated testing which allows our teams to recognize if something isn't working before it's released. Developers and Quality Engineers now have their own environments to test in so by the time we deploy to a production environment there are no bugs within the system.
  - o With continuous integration/continuous deployment (CI/CD) we can release smaller changes more often. We've moved from once a year to every 4 weeks and once in the cloud we can release even more frequently
  - o Any repairs to the system will happen in the background and will have no impact to customers
- • Cloud Migration Timeline
  - o In August 2022, we completed what we are calling Component One of the migration. This includes asynchronous tools and services such as Similarity Check, Duplicate Submission Check, ORCID PR deposit
  - o Component Two is underway which is the migration of customer sites/data
  - o What remains through the end of 2023 is mail systems, sFTP transfer, reporting, and backend systems not interfacing directly with customers

- o The plan is to have this work completed by end of year 2023
- o Question: You are using two providers? Are some sites on one and some on the other?
    - ▪ Answer: We are using Amazon Web Services (AWS) and Microsoft Azure. The reason we are using Azure is that we have Microsoft products that don't work as well in AWS currently. We are leveraging some of the capabilities within Azure but the end goal is to rearchitect to get off Azure and have everything on AWS.
- o Question: Is the main approach ensuring performance in China?
    - ▪ Answer: We are not making our entire application global. Our servers will live in US-East 2. Once the migration is complete, we will start a caching project which will help with performance in China. We are also aware of the firewalls in China and are working towards global caching and accelerators as well as, potential deploying within the AWS regions within China.

- Nathan Westgarth, Vice President of Product Management at Aries, presented on the product roadmap.
- Product Development Roadmap and Approaches 2023 and Beyond:
    - o Performance enhancements and cloud migration
    - o User interface and user experience (UI/UX)
        - ▪ The UI team is developing and expanding on a design system which is reusable components and pattens that makes updating the system much faster
        - ▪ The majority of the work we have completed this year have been on improving site accessibility of the Author submission workflow
        - ▪ Our teams are now working on the Editor Main Menus which were showcased at EMUG 2023 as a means to collect user feedback on prototypes at that time
        - ▪ The teams are also working on interface design and usability of all initial workflow touchpoints for all users such as login pages and main menus
        - ▪ Question: Last we met Aries was in the beginning of the UI/UX initiative we keep hearing there is a lot of resistance to change from users. How are you managing this?
            - • Answer: We are doing as much research upfront and talking to customers about how they use workflows before we make changes but because the product is so flexible it is very tough to know how customers use every workflow. How we manage that is by talking to customers post release to better understand their needs. We are also taking a staged approach which is more cautious to allow customers to get familiar with the changes. We are still learning how to best do this but hoping users see the value.
    - o API Services and third-party integrations
        - ▪ Integrations have proved to offer innovations for customers quite quickly

- So far this year we've been working on our APC payment provider integrations to better support institutional agreements and making those estimates more visible to authors during the submission process
- We have been actively working with STM Solutions for integrating and piloting the STM Integrity Hub
  - Question: Jennifer asked who on the board is working with the STM Integrity Hub?
    - Answer: Several board members commented that they are taking a "wait and see" approach.
- This year we've expanded our partnerships further, particularly with new options for reviewer finding tools, one with Prophy and another with Scopus.
  - Find Reviewers using Scopus – well-proven solution available across Elsevier. We've recently run a webinar and have more information available on our website.
  - We are excited about this integration because we were able to partner with Elsevier to make it available to our customers
  - The breadth of Scopus means better data. The tool offers a dynamic search engine and allows Authors to change their search parameters and change filters opposed to just a static list
  - It helps manage reviewer candidates by flagging potential COI and works to reduce bias through algorithm suggestions.
  - The integration itself is seamless within the workflow
  - It has proved to be an interesting use case for us, we are now discussing with Elsevier what other solutions could be offered more broadly outside of just Elsevier customers and offering these tools in a way that it is clear where the data is going.
  - Questions: Scopus Find Reviewers - will customers need to be a Scopus customer to use Find Reviewers using Scopus?
    - Answer: No, you do not need to be a Scopus customer

- Author experience improvements
  - This theme expanded from Institutional identifier matching to make it a better experience for authors
  - Improving the Author experience through new author submission interfaces. We are starting to look at ways in which we can simplify the submission process for authors through author portals and integrating language tools into the initial experience
- EM/PM Workflow enhancements
  - We are getting a lot of input from customers to ensure these enhancements are serving our customers' needs
  - We are working to support the collection of inclusionary data per the joint commitment
  - We are looking to enhance EM to better support reviewer mentorship, which would make it easier for publishers to invite junior reviewers without workarounds, while hopefully have the long-term effect of increasing the reviewer pools for publishers over time.

- We are actively looking at capabilities we could offer in-product to support research and identity integrity efforts which is a growing concern within the publishing community. Though we are partnering with vendors in the industry that offer specific tools in this space and with STM on their Integrity Hub, there are also opportunities for us to improve our offering within EM itself, such as expanding further on our Identity Confidence Check capabilities that have been in place for some time
    - And lastly, we're implementing in-product messaging and help tooltip capabilities within EM, though how we roll those out and in what priority order for the various use-cases those technology options could support is not yet determined. We will need to actively engage our customers generally to make sure it is in line with expectations and strikes the right balance of adding value to our product, and our collective users of EM being the authors, reviewer and editors who use the system against frustrating users with survey fatigue
- Aries Feature Development
    - We are making shifts to how the product teams work to develop solutions
    - Over the past couple of years, we have moved to an Agile approach where squads are responsible for specific user persona, use-cases, or need and delivering outcomes for those users and the responsibilities overlap with the roadmap themes. Each theme is owned by a specific squad
    - We are taking on a more iterative approach to development towards a solution to get real-time user feedback and product data
    - Putting more focus on strategic initiatives which means we have to say "no" to some ideas. In the past, we would take on customer funded work and moving forward we will be more selective with this work to ensure we stay true to our strategy
    - Product principles:
    - We are moving responsivity and decision making to our teams and have come up with a set of principles to work as guidelines for the team. Principles are:
        - Mindful configurability – should offer value to our customers
        - Self-service – major difference in EM/PM is flexibility of the solution
        - Available to all – move away from bespoke but make a solution available to all
        - Submission data is the customer's data – this has always been our approach. Our customers own their data and we should help them take it with them
        - Quality products. – low bugs
        - Respectful partnerships – giving partners
        - Solutions vs APIs – we know many customers can't leverage APIs. We recognize the need to offer full solutions.
        - Data- driven decisions – using NPS surveys, user feedback, retrospectives, etc.
- In-product Feedback

- Surveys and ad-hoc feedback for product development purposes this also may include notifications and announcements for new features, product changes, tool tips/help, etc.
  - Questions: Surveys – if you are triggering surveys across all journals whose data is that?
  - Answer: This is something we need to pick up with customers. We understand they are our customers' users, and we need to work this through.

  - Product Analytics
    - Insights for our product prioritization, e.g., determining priority workflows for our UX redesign initiative
    - Data analysis beyond vanity metrics such as user flows, task completion time, page views, drop-offs, for improving the user experience and journeys
    - Another example where we are able to leverage Elsevier tools where our staff has a secure view

  - Question: Previously there was a bullet point around incident management and responses. How would you like this to work? What we use conventional and traditionally over email works now but will it work into the future? How we raise bugs or report requests.
    - Answer: We are discussing how we can adjust release notes to make them more available as we shorten release cycles

  - Questions: How do we keep on top of bug submittals as the pace of updates increases
    - Answer: This is the Client Services team's primary goal next year. They are working to develop a new system for pushing information and tickets out. The in-EM notification systems would be something we could use.

Wrap up
Jennifer shared that the board meeting schedule will take on a virtual bi-annual cadence. Jennifer shared she will be at STM Frankfurt and the bookfair and would like to get everyone together. The meeting concluded around 10:00am US-Eastern.