Welcome to the 16TH Annual EMUG BOSTON #EMUG2018
Increased Convenience for Editors

Anna Walton,
Account Coordinator,
awalton@ariessys.com
Increased Convenience for Editors

- Sign Posting
- Automated Editor Summary Reminders
- Automated Reminders
- Editor Decision and Decision Phrases
- Editor Specific Configuration Options
- My Reviewer Preferences
- Assign Only Specific Editor Role Permissions
- Reviewer Discovery
- Duplicate Submission check
- Flags
Sign Posting

Prioritise Late Submissions
Sign Posting

• Submissions are placed in folders subject to their current status and the type of action they require next.
• On the Editor Main Menu page users can see the folder names and the number of submissions in those folders.
• In version 14.0 we introduced colour-coded signposts which enable Editors to see at a glance which folders contain submissions which require attention most urgently.
• The publication can define the time thresholds for each status to highlight submissions by priority:
  - On Schedule
  - Needs Attention
  - Late
Sign Posting

Editor 'To-Do' List

My Pending Assignments (107)
- New Submissions (20)
- Revised Submissions (2)
- New Submissions Requiring Assignment (1)
- Revised Submissions Requiring Assignment (0)
- Incomplete Submissions (2)
- New Invitations (10)
- New Assignments (8)
- Submissions with Rescinded Decision (2)
- Submissions with Required Reviews Complete (9)
- Submissions Requiring Additional Reviewers (11)
- Submissions with One or More Late Reviews (2)
- Submissions with Active Discussions (45)

Reviews in Progress (27)
- Reviewers Invited - No Response (11)
- Submissions Under Review (26)
Sign Posting

- Colour-coding extends into the folders, where Editors can see which individual submissions require attention as priority, relative to the configured time thresholds.

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Article Title</th>
<th>Article Type</th>
<th>Sections/Edits</th>
<th>Author</th>
<th>Initial Date</th>
<th>Status Date</th>
<th>Corrected Revision Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Submission Details</td>
<td>SAN074-V40-D17-1000</td>
<td>Busy People</td>
<td>Original</td>
<td>Base Science Section</td>
<td>Jan Lee, PhD</td>
<td>Mar 23, 2017</td>
<td>Mar 13, 2017</td>
<td>Submitted Revisions Completed</td>
</tr>
<tr>
<td>View Submission Details</td>
<td>SAN074-V40-D17-1002</td>
<td>Testing again</td>
<td>Special Issue Q6</td>
<td>Special Issue Q6</td>
<td>Fran Forest</td>
<td>Mar 14, 2017</td>
<td>Mar 14, 2017</td>
<td>With Editor</td>
</tr>
<tr>
<td>View Submission Details</td>
<td>SAN074-V40-D17-1002</td>
<td>A Study of Spring</td>
<td>Original</td>
<td>A Study of Spring</td>
<td>Rocky Holmes</td>
<td>Mar 16, 2017</td>
<td>Mar 16, 2017</td>
<td>With Editor</td>
</tr>
<tr>
<td>View Submission Details</td>
<td>SAN074-V40-D17-10023</td>
<td>Snow Crystals</td>
<td>Original</td>
<td>Snow Crystals</td>
<td>Oliver Owen</td>
<td>Mar 16, 2017</td>
<td>Mar 16, 2017</td>
<td>With Editor</td>
</tr>
</tbody>
</table>
Sign Posting – Configuration

• In Policy Manager, under General Policies, select “Configure Warning Thresholds” to set the “Needs Attention” and “Late” thresholds.

• Then in Role Manager update each Editor Role for which signposting should appear and check (enable) the box next to “View Warning Status Signposts” under General Searching and Viewing.
Automated Editor Summary

Reminders

A Helpful Reminder for Your Editors
Automated Editor Summary Reminders (AESRs)

• These are reminder emails sent to Editors at regular intervals that summarise an Editor’s assignments from 3 key folders in the Editor’s To Do List to help remind Editors of what needs doing and what to prioritise.
• In version 14.0 the AESRs were enhanced and can now provide information from up to 11 assignment related Editor Main Menu Folders.
• Both the folder summary and the details report can include folders from the Editor’s To Do List and the Subordinate Editor’s Pending Assignments sections.
• The details report also pulls in information on review status.
• Easier to read and more visually appealing.
• For Rich Text (HTML) emails the new format uses the same colour coding as the Editor signposting.
Automated Editor Summary Reminders (AESRs)

- The HTML AESR showing colour coding, enhanced formatting and deeplinks.

- The Email recipient can see at a glance which folders have assignments that need attention or are behind schedule.

- The emails can be configured to show a folder summary and/or submission lists.

- Folder names can be listed in the letter as deeplinks that will log the recipient into EM and go directly to the folder.

- A plain text version of the AESRs also available – no colour coding or enhanced formatting.
Automated Editor Summary Reminders (AESRs)

- Submission lists show the contents of Editor folders including details such as title, author(s), abstract and review status.
- Submissions also have a colour-coded outline to indicate whether submissions need attention.
Automated Editor Summary Reminders (AESRs) Merge Fields

- In the 14.0 enhancements there are 2 new merge fields for use only in AESRs:
  - `%EDITOR_REMINDER_FOLDER_SUMMARY%` - pulls in folder summary
  - `%EDITOR_REMINDER_SUBMISSION_LISTS%` - pulls in submission list

- The Enhancement also introduces two similar merge fields for use in any letter to an Editor whose Editor Role has the "Receive Assignments" permission:
  - `%EDITOR_ASSIGNMENT_FOLDER_SUMMARY%`
  - `%EDITOR_ASSIGNMENT_SUBMISSION_LISTS%`

- These two any-letter fields summarise information from all 11 assignment-related Editor folders (excluding the New Invitations folder if the recipient Editor role does not have permission to receive invitations for assignments).
Automated Editor Summary Reminders – Configuration

• To configure the enhanced AESR functionality, log into Policy Manager and, under General Policies, select “Configure Warning Thresholds” to set the “Needs Attention” and “Late” times (otherwise the colour-coding in the emails will reflect the default).

• Next under Email and Letter Policies, select “Edit Letters” to edit an existing letter or create a new one in the Editor Reminder Family.

• If you are not already using the enhanced AESR merge fields these will need to be added into the letter body.

• Finally, go to Configure Automated Summary Reminders (under Editor Assignment Policies) to set up the reminders for Editor Roles with permission to receive assignments.

• Check the boxes for folders to include and indicate (by selecting a radio button) when to include the folder’s information: always, only if items need attention, or only if items are late. These designations correspond to the colour-coding.

• To include Author List and/or Abstract check the applicable boxes.
Automated Reminders

Automated with a Personal Touch!
Automated Reminders

• Editors and/or Admins can set up Automated Reminder Reports to send out reminders to Authors/Reviewers.
• This is permission based (Role Manager).
• This permission can also be restricted to only submissions assigned to that Editor.
• Saves time.
• A reminder can also be restricted to one or more Article Types or Section/Categories.
Automated Reminders - Author

Authors:
• Automated Author Revision Reminder Report
• Automated Author Transfer Reminder Report

Invited Authors:
• Automated Author Invitation Reminder Report
Automated Author Revision Reminder Reports

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

<table>
<thead>
<tr>
<th>Reminder Type:</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outstanding Revisions:</strong></td>
<td>Send an automated reminder e-mail to Authors who were asked to revise their submission exactly [ ] days ago. If Authors have already submitted their revision or have declined to revise, they will not receive a reminder.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Reminder Before Revision Due Date:</strong></td>
<td>Send an automated reminder e-mail for revisions that are exactly [ ] days before their due date. Reminders will be sent to Authors who have agreed to submit a revised manuscript but have not yet submitted their revision.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Reminder Past Revision Due Date:</strong></td>
<td>Send an automated reminder e-mail for revisions that are exactly [ ] days past the due date. To send reminders for revisions that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Authors who were asked to revise their submission, but have not submitted their revision or declined to revise.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First Assigned Editor:</th>
<th>[All Editors]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editor Who Made First Decision:</td>
<td>[All Editors]</td>
</tr>
<tr>
<td>Reminder Name:</td>
<td>Insert Special Character</td>
</tr>
<tr>
<td>Maximum 200 characters</td>
<td></td>
</tr>
<tr>
<td>Reminder Letter:</td>
<td>Please Choose an Automated Reminder</td>
</tr>
</tbody>
</table>

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.

| Article Type: | Original Study
| Editorial
| Review
| Rapid Communication |

| Section/Category: | Basic Science Section
| Clinical Section
| Epidemiology Section
| No Section Assigned |

Save as Automated Reminder
Automated Reminders – Author Transfer

Automated Author Transfer Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Author Transfer Reminder Report will be run once every 24 hours to send reminder e-mails to Authors who have outstanding transfer requests that meet the report's criteria.

Reminder Type:
- Reminder Before Transfer Offer Expires: Send automated reminder e-mails to Authors whose transfer offers expire in exactly [x] days. If Authors have already accepted or declined a transfer offer, or their transfer offer has expired, they will not be sent a reminder. Enter a number from 1 to 99.
- Reminder After Transfer Offer Sent: Send automated reminder e-mails to Authors who were sent transfer offers exactly [x] days ago. If authors have already accepted or declined a transfer offer, or their transfer offer has expired, they will not be sent a reminder. Enter a number from 1 to 99.

First Assigned Editor: (All Editors)
Editor Who Made First Decision: (All Editors)
Reminder Name: Insert Special Character
Reminder Letter: 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.

Article Type:
- Original Study
- Editorial
- Review
- Rapid Communication

Section/Category:
- Basic Science Section
- Clinical Section
- Dermatology Section
- No Section Assigned

Save as Automated Reminder
Automated Reminders - Reviewer

Reviewers:

• Automated Reviewer Reminder Report

Reviewer Reminder Reports
- Reviewer Invited - No Response Report
- Reviewer Reminder Report
  - Automated Reviewer Reminder Report
Automated Reviewer Reminder Reports

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

**Reminder Type:**
- **No Response, Send Reminder:** Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly 5 days ago. Reminders will be sent to Reviewers who have neither accepted nor declined the review invitation, and have not been un-invited or terminated.
- **Reminder Before Due Date:** Send an automated reminder e-mail for reviews that are exactly 10 days before their due date. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.
- **Reminder Past Due Date:** Send an automated reminder e-mail for reviews that are exactly 7 days past the due date. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.

**Reviewer Role:**
- (All Reviewers)

**Handling Editor:**
- (All Editors)

**Reminder Name:**
- **Insert Special Character**
- Maximum 200 characters

**Reminder Letter:**
- 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.

**Article Type:**
- Original Study
- Editorial
- Rapid Communication

**Select All**

**Clear All**

**Section/Category:**
- Basic Science Section
- Clinical Section
- Epidemiology Section
- No Section Assigned

**Select All**

**Clear All**

Save as Automated Reminder
Automated Reminders – Configuration 1

In Policy Manager, E-mail and Letter Policies, Edit Letters, add/edit reminder letters (in the Reviewer/Author Reminder Letter Family).

Now go to Send Reminder Letters in the Administrative Functions section of the Main Menu (ARs can also be accessed through Reports).

Select the link for the automated reminders you would like to create.
## Automated Reviewer Reminder Reports

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

### Reminder Type:
- **No Response, Send Reminder:** Send an automated reminder e-mail to Reviewers with outstanding invitations that were sent exactly 5 days ago. Reminders will be sent to Reviewers who have neither accepted nor declined the review invitation, and have not been un-invited or terminated.
- **Reminder Before Due Date:** Send an automated reminder e-mail for reviews that are exactly 10 days before their due date. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.
- **Reminder Past Due Date:** Send an automated reminder e-mail for reviews that are exactly 7 days past the due date. To send reminders for reviews that are due on the day the reminder report is run, enter 0 days. Reminders will be sent to Reviewers who have agreed to the review invitation but have not yet submitted their review.

### Reviewer Role:
(All Reviewers)

### Handling Editor:
(All Editors)

### Reminder Name:
Insert Special Character
Maximum 200 characters

### Reminder Letter:
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.

### Article Type:
- Original Study
- Editorial
- Review
- Rapid Communication

### Select All

### Clear All

### Section/Category:
- Basic Science Section
- Clinical Section
- Epidemiology Section
- No Section Assigned

### Select All

### Clear All

Save as Automated Reminder
Automated Author Reminders – Coming Soon!

• Coming in version 15.0, Author Automated Reminders –
  - Incomplete.
  - Needs Approval.
• To allow sending automated reminders for authors where:
  1. A Submission has been started but not completed.
  2. A Submission PDF has been created but not approved.
  3. A Submission has been sent back to Author.
Automated Author Reminders – Coming Soon in v15.0!

- Coming in version 15.0, Author Automated Reminders.
- Incomplete - submissions in the Incomplete Submissions folder that have been there for exactly [X] days.
- Needs Approval - submissions in the Submissions Waiting for Author’s Approval folder that have been there for exactly [X] days.
- Sent back to Author - submissions in the Submissions Sent Back to Authors folder that have been there for exactly [X] days.
Automated Author Reminders – Coming Soon!

Configuration 1

- Permission in Role Manager.
- In the Administrative and Reporting Functions section for Editor Role Manager permissions.
Automated Author Reminders – Coming Soon!

Configuration 2

Send Reminder Letters
Click a link below to access the reminder report, from which reminder letters can be sent.

Author Reminder Reports
- Co-Author Reminder Report
- Author Revision Status Report
- Author Revision Reminder Report
- Automated Author Submission Reminder Report
- Automated Author Revision Reminder Report
- Automated Author Transfer Reminder Report

Invited Author Reminder Reports
- Authors Invited – No Response
- Author Invitation Status Report
- Automated Author Invitation Reminder Report

In “Send Reminder Letters”

Reports
Report Tools
- Enterprise Analytics Reporting
- General Data Export
- Custom Report
- Search/Manage Conference Submissions

Status Reports
- Accepted Manuscripts Without a Publication Date
- Current Status Report
- Publishing Pipeline Report
- Published Table of Contents Report
- Editor’s To-Do List Report
- Current Role Designations Report

Author Reminder Reports
- Co-Author Reminder Report
- Author Revision Status Report
- Author Revision Reminder Report
- Automated Author Submission Reminder Report
- Automated Author Revision Reminder Report
- Automated Author Transfer Reminder Report

In “Reports”
Decision Phrases

Speak with the Same Voice
Decision Phrases

- Previously, Editors who routinely made the same comments during the decision process had to repeatedly type or cut and paste those comments every time they submitted a decision letter.
- For high-volume publications this can be time consuming (and error-prone).
- Editors may use different language.
- The Editor Decision Phrases enable publications to provide a consistent voice when communicating decisions with their authors.
- Saves Editors’ time.
- First publications create a pool of Editor Decision Phrases for their Editors to use.
- When Editors are on the “Submit Editor’s Decision and Comments” page they can select any, all or none of the configured decision phrases to include in the letter.
- Phrases selected by the Editor populate a new merge field:

  %EDITOR_DECISION_PHRASES%
Dear %TITLE% %LAST_NAME%,

Reviewers have now commented on your paper. You will see that they are advising that you revise your manuscript. If you are prepared to undertake the work required, I would be pleased to reconsider my decision.

For your guidance, reviewers' comments are appended below.

Editor Decision Phrase 1

This allows you to create short snippets of text or longer sections of explanation for the body of the decision letter.

This is a very good paper which would benefit from some small changes prior to publication.

If you decide to revise the work, please submit a list of changes or a rebuttal against each point which is being raised when you submit the revised manuscript.

Your revision is due by %DATE_REVISION_DUE%.
Decision Phrases

In View Reviews and Comments:

**Eddie Editor (Editor)**

<table>
<thead>
<tr>
<th>Date Submitted:</th>
<th>Feb 28, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Date:</td>
<td>Oct 19, 2017</td>
</tr>
<tr>
<td>Current Status:</td>
<td>Rebuttal</td>
</tr>
<tr>
<td>Final Disposition:</td>
<td></td>
</tr>
<tr>
<td>Editor's Recommendation:</td>
<td>Reject</td>
</tr>
<tr>
<td>Overall Editor Manuscript Rating (1-100):</td>
<td>(1-100) View Manuscript Rating Card</td>
</tr>
<tr>
<td>Date Assignment Completed:</td>
<td>Oct 19, 2017</td>
</tr>
<tr>
<td>Elapsed Days:</td>
<td>232</td>
</tr>
</tbody>
</table>

**Editor Decision Phrases:**

Editor Decision Phrase 1

This allows you to create short snippets of text or longer sections of explanation for the body of the decision letter.

They are also displayed when viewing the Editors recommendation.

This is a very good paper which would benefit from some small changes prior to publication.

**Editor's Comments to Editor:**

Please give a frank account of the strengths and weaknesses of the article:

Reviewer, Reggie Reviewer: Is there a financial or other conflict of interest between your work and that of the authors? YES __ NO __
Decision Phrases – Configuration 1

• In Policy Manager, go to the Editor Decision Phrases section.

• Click the link to the “Configure Editor Decision Phrases” page.

• Click “Add Editor Decision Phrase” to open a pop up window.
• Enter the phrase, save and continue to add more phrases as needed.

• Create new or edit existing Editor Forms where the phrases will be used (a link to the Create Editor Forms page is on the Configure Editor Decision Phrases page and in Policy Manager).

• Click “Add Editor Decision Phrase” to open pop up and check the appropriate phrases for the Editor Form and click save icon.

• The selected Phrases will then appear on the main form page.

• Finally, navigate to the Editor Form Configuration page and match the Editor Form to the appropriate Role and Article Types.
Sneak Peek - Coming Soon!
Editor Questionnaires

Coming in Version 16.0

NOTE: This is subject to change
Coming Soon! Editor Questionnaires in v16.0
This is subject to change

• Extends the Custom Review Question functionality to the Editor Form.

• Allows publications to collect specific information from their Editors as part of the peer review process during all revisions of a submission.

• Similar to current functionality, a Custom Review Question can be added to multiple Editor and/or Review Forms.

• Allows you to ask your Editors the same questions as your reviewers or different questions.

• Available for Decision Letter merging (using 2 new merge fields).
Editor Specific Configuration Options

Personalise Your View
### View All Assigned Submissions - mary mary

Content: This page lists all submissions that have been assigned to an Editor, for which the Editor's decision has not yet been made. This includes submissions with invited reviewers, submissions out for review, submissions requiring a decision, and submissions which have a subordinate Editor's decision but not a decision from the top Editor in the decision-making chain.

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Article Type</th>
<th>Section Category</th>
<th>Article Title</th>
<th>Author</th>
<th>Initial Date Submitted</th>
<th>Status Date</th>
<th>Status</th>
<th>Current Status</th>
<th>Editor with Current Responsibility</th>
<th>Review Status</th>
<th>Editor Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Submission</td>
<td>DEMO.2017.0007</td>
<td>RapidTestNv</td>
<td></td>
<td>Tea is Essential to Life!</td>
<td>Andy Author</td>
<td>Feb 23, 2017</td>
<td>Nov 23, 2017</td>
<td>Under Review</td>
<td>mary mary</td>
<td>2 Agreed 1 Late (more...)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Submission</td>
<td>DEMO.2017.0002</td>
<td>RapidTestNv</td>
<td></td>
<td>Test Title 2</td>
<td>Amy Author</td>
<td>Jan 18, 2017</td>
<td>Feb 21, 2017</td>
<td>W</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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**: Action, Manuscript Number, Article Type, Section Category, Article Title, Author, Initial Date Submitted, Status Date, Current Status, Editor with Current Responsibility, Review Status, Editor Decision
- **Fixed**: Yes/No
- **Show**: Yes/No
Saved Searches

For speed and convenience:
My Reviewer Preferences

Personalise Reviewer Suggestion and Display
My Suggest Reviewer Preferences

Reviewer Selection Summary - Submission DEMO.2017.0007

Andy Author
Tea is Essential to Life!

Reviewer Search
- Search My Publication
- Search for Reviewers
- Reviewer Discovery from Pivot ProQuest Community of Scholars

Review Settings
This Submission will move to the 'Submissions with Required Reviews Complete' list when completed.
Automatically un-invite reviewers who do not respond to an invitation within 2 days.
Automatically un-assign reviewers who do not complete a review within 0 days.

Excluded from the list:
- People from the same institution
- People from the same city
- People with unavailable dates within the next 0 days
- People with more than 0 pending reviews
- People with fewer than 2 matches to manuscript classifications

Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers
- Anna Walton (Reviewer)
- Rosie Reviewer (Reviewer)

Sort the Candidate Reviewer list in order of importance by:
1. Board membership
2. Number of matches to manuscript classifications
3. Number of pending reviews
4. Average number of days reviews are outstanding
5. Date last review completed
6. Average Review Rating (Highest Ratings listed first)
7. Total Number of Completed Reviews (Highest number displayed first)

Update Order
My Reviewer Display Preferences

Reviewer Selection Summary - Submission DEMO.2017.0007
Andy Author
Tea is Essential to Life!

Reviewer Search
- Search My Publication
- Search for Reviewers
- Reviewer Discovery from ProQuest Community of Scholars

Review Settings
This Submission will move to the 'Submissions with Required Review' list when the review is completed.
Automatically un-invite reviewers who do not respond to an invitation.
Automatically un-assign reviewers who do not complete a review.

Selected Reviewers
Invited Reviewers and Linked Alternate Reviewers
Anna Walton (Reviewer)
Rosie Reviewer (Reviewer)

My Reviewer Display Preferences

Classifications
- Show only Classification matches with manuscript
- Suppress Classifications
- Show all Personal Classifications for the Reviewer candidate

Sort the Candidate Reviewer list in order of importance by:
- Ascending Reviewer Name
- Number of Matches to Manuscript Classifications (Most matches displayed first)
- Board Membership (Board Members listed first)
- Average Review Rating (Highest Ratings listed first)
- Total Number of Completed Reviews (Highest number displayed first)
Assign Only Specific Editor Role Permissions

Editor Role Permission – Allow Assignment of Only Specific Editor Roles
Assign Only Specific Editor Role Permissions

• You may wish to allow your EiCs to be able to assign an Editor role to subordinate Editors but not to be able to assign other Editor roles with more permissions, such as Admin etc.

• You can restrict the Editor roles that can be assigned by an Editor in Role Manager.

• This helps the Admin as the Editor can assign a role to subordinates.
Assign Only Specific Editor Role Permissions

• Configured in Role Manager, Editor Roles, Edit “Editor” or “Editor in Chief” role.

• Under Viewing and Editing People Data.

• Can select one or use ctrl + click to multi select more than one Editor role.
Reviewer Discovery

Increase Your Reviewer Pool
Reviewer Discovery (RD)

- Journals need to find reviewers in a timely fashion.
- A journal’s reviewer pool is often overburdened and journals can spend a lot of time searching outside of the reviewer pool.
- RD uses ProQuest, a well-curated database of biographic and bibliographic profiles on approximately 2.5 million scholars and researchers (including e-mail addresses).
- RD allows these profiles to be matched against the title and abstract of a submission, based on how closely the topics reflected in the title/abstract correlate with the PQ scholar profiles.
- Increases and refreshes the journal’s reviewer pool and also helps to find reviewers for more niche submissions.
The resulting records are displayed in one of three ways:

- A Pivot Candidate.
- A Candidate that is a potential match in the publication.
- An unambiguously matched (Confirmed) publication user.

Up to 100 results can be displayed.
Reviewer Discovery

Assign Reviewer Role

All Reviewer candidates must be assigned a Reviewer Role before being invited to review. Please assign a Reviewer Role to the people who do not yet have roles. You can also check 'Do not use this Person' if you decide not to invite them.

<table>
<thead>
<tr>
<th>Name</th>
<th>Selected As</th>
<th>Reviewer Role</th>
<th>Do not use this Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hirofumi Tachibana</td>
<td>Invited</td>
<td>Reviewer</td>
<td></td>
</tr>
</tbody>
</table>

Select Reviewers - Confirm Selection and Customize Letters
Submission DEMO.2017.0007

Andy Author
"Tea is Essential to Life!"

You have selected the following people as potential Reviewers (more...)

<table>
<thead>
<tr>
<th>Name</th>
<th>Letter</th>
<th>Days to Review</th>
<th>Do Not Invite</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kate Hammer</td>
<td>Reviewer Invitation</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Change Selections

Cancel Confirm Selections and Proceed
Reviewer Discovery

• To enable the Reviewer Discovery feature, contact your Aries representative.

• Once this feature is enabled, the new “Reviewer Discovery from ProQuest Community of Scholars” search option is available for Editors with permission to Invite/Assign/Propose/select Alternate Reviewers (in Role Manager).
Reviewer Discovery – Prevent Duplicates

- In v14.0 an enhancement was added an option to the existing “Set Duplicate E-mail Policy” page in Policy Manager.

- This option helps to prevent Editors from registering a new user via the ProQuest tool if the user already has an account within the EM site.

- When enabled, if Editors attempt to select the Reviewer Discovery candidate (which proxy-registers the person with an email address that already exists in the system) if there is a matching email address in EM there will be a warning message which asks the Editor to select the existing EM-registered user instead.

- If there is more than one match all are shown and the Editor can choose which one to use.
### Reviewer Discovery – Prevent Duplicates

- If the user selects the possible EM match, (s)he proceeds through customising the letter, amending the due dates etc. in the usual way.

- If the user selects the Reviewer Discovery Candidate that person is proxy-registered behind the scenes.

- Also cosmetic/visual enhancements to simplify and improve user experience.
  - The reviewer candidate that is already registered in EM is now shown above the RD option to help encourage use of the current EM option.
  - The department (if available) and email address of the EM match are displayed as if they are not shown it may give the Editor the false impression that the data is missing from the user record which may prompt them to choose to use the RD entry.
Reviewer Discovery – Configuration

- In Policy Manager, Registration Policies, Set Duplicate E-mail Address Policy.
- Select “Yes” under Prevent Duplicate E-mail Addresses for Reviewer Discovery.
- If “No” is selected current behaviour is retained.

Prevent Duplicate E-mail Addresses for Reviewer Discovery

When a Reviewer Discovery candidate is returned from the Pivot ProQuest Community of Scholars database, the system checks to see if the ProQuest e-mail address already exists in the EM database. If a matching e-mail address is found in EM, both the ProQuest record and the EM record are displayed for the Editor, and s/he can choose which person to use. If the Editor selects the ProQuest record, the person is proxy-registered in EM and a person record with a duplicate email address is created. This setting allows you to determine whether Editors are allowed to select and use a Reviewer Discovery candidate that may already exist in EM, thereby creating a duplicate account with the same e-mail address.

Select ‘Yes’ to prevent the Editor from selecting and proxy-registering a person that may already exist in EM on the Reviewer Discovery Results page.

☐ Yes  ☐ No
Duplicate Submission Check

Am I Seeing Double?
Am I Seeing Double?
Duplicate Submission Check

Helps publications easily identify duplicate submissions where either an author has submitted more than one paper by mistake or a co-author has also submitted the same paper:

- A green D symbol shows if the author of a submission has submitted another paper within the previous X days (X is configurable).
Duplicate Submission Check

- Enhanced Duplicate Submission Checking calculates a score as %:
  - Article Title Similarity – 40% of the total score
  - Author Similarity – 30% of the total score
  - Abstract Similarity – 30% of the total score
- Also a 'Duplicate Submission Check Results' link will be displayed to users with permission. Clicking the link will display a list of similar submissions.
Duplicate Submission Check – Configuration 1

- In Policy Manager, Submission Policies, Configure Duplicate Submission Check.
- In Policy Manager, Submission Policies, Edit Article Types.
Duplicate Submission Check – Configuration 2

- In Role Manager, General Searching and Viewing, **View Duplicate Submission Check Results**.
Flags

Visual Reminders
Flags

There are two main types of flags that are useful for Editors:

- People Flags
- Submission Flags

- Only visible to those users with permission.
- Can be set to be shown in the History.
- Hovering over the flag tells you what that flag means.
- You can also search on flags.
Flags – Configuration 1

**Create Customized Submission Flags**

Submission Flags can be attached to submission records on the Submission Flags page (accessible from the 'Details' page), or by clicking on the flag icon on any page where Submission Flags are displayed, (with permission to “turn on submission flags”). You can also set a flag by clicking the ‘Edit Flag’ link in a Field. When a Flag is displayed for a submission, it is visible to editors and publishers (with appropriate RollManager permissions) on all pages where the ‘Details’ action link is displayed. For sites using Production Tracking, Submission Flags are also displayed next to the ‘Production Details’ action link. The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both. If a Flag is associated with a specific Additional Manuscript Details (AMD) field, the option to attach or remove the Flag displays next to the associated AMD field.

- In Policy Manager, General Policies, Create Customized Submission Flags.
- In Policy Manager, General Policies, Create Customized People Flags.
- You can Add, Edit or Remove Flags.

**Add Customized Submission Flag**

Please enter the flag name and choose an icon from the menu. Editors and Publishers with RollManager permission to Turn On Submission Flag and Turn Off Submission Flag can display/turn off Submission Flags for any manuscript on the Submission Flags page (accessible from the Details page). The Flag Type indicates whether a particular flag is displayed on the editorial or production side of the system, or both. If you associate the Flag with an Additional Manuscript Details (AMD) field, then editors and publishers can also display/toggle off the Flag on pages containing that AMD field. When a Flag is attached to a submission, it will be displayed next to the ‘Details’ action link on all pages where the ‘Details’ link is displayed (editor and publisher RollManager permission is required to ‘view Submission Flags’).

- Choose an unused flag icon.
- Name your Flag.
- Editorial or Production?
- AMD Field?
- Display in History?
Flags – Configuration 2

- In Role Manager, Editor or Publisher role, Edit Role, Flag Icons.

- Can be set up so different Editor and Publisher Roles have different permissions, for example, the Associate Editor could be set up to View Flags only and the Editor in Chief or Admin could be set up to View Flags, Turn Flags on or off and see Flags in the history.
Flags - Associate Flags with Submission Questions (new in v14.1)

- Allows Submission Flags to be associated with Custom Submission Question responses and automatically turned on when a Corresponding Author enters a specific response to a question.
Flags - Associate Flags with Submission Questions (new in v14.1)  
Configuration 1

1. Create your flags in Policy Manager, General Policies, Create Customized Submission Flags.

2. Next create/edit the Custom Question in Policy Manager, Questionnaire Policies, Create Custom Questions.

3. Click “Associate with Flag” to select the Flag for that answer.
4. Select the flag you want for that answer.

5. If you want a flag for the other answer(s), add those too.

6. Save your settings (“Save and Close” or “Save and Add Another Question”).
Flags - Associate Flags with Submission Questions (new in v14.1)

Configuration 3

7. On the Create Custom Question page you will now see the questions and their associated flags.

8. If you added a new question, add this to the desired questionnaire.
Questions?