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EMUG 2023



Courtyard Boston Downtown Hotel
June 14-15, 2023

Aries
systems.



EMUG 2023

Convenient Editor Functions

Ann McLaughlin

Account Manager

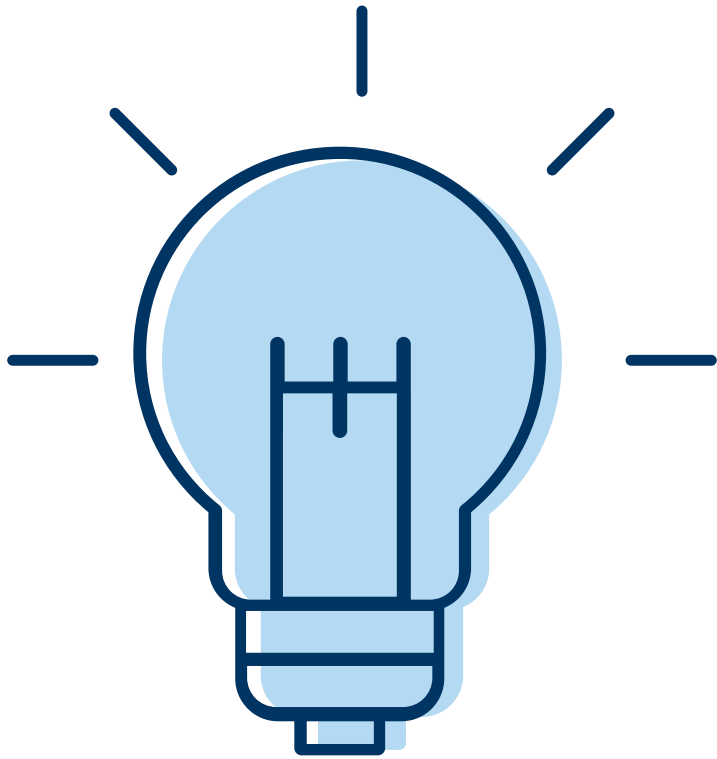
Amclaughlin@ariessys.com

Agenda

Welcome to EMUG: Day 1

- Getting the Big Picture
 - Editor Signposting
 - EAR reports
 - Turn-Around Times
 - Journal Statistics
- Gathering Information
 - Identity Confidence Check
 - Forms, Questionnaires, and Automated Flags
- Moving Things Along
 - Assignment Chains & DTE
 - Summary and Reminder Reports
 - Decision Phrases
 - Batch Functionality
 - Task Manager
- Resources
- Questions from Attendees





Getting the Big Picture

Editor Signposting

- Editor Signposting provides a quick visual summary of where Manuscripts are at in the workflow

Subordinate Editor's Pending Assignments (12)

- Group by Editors I Assigned
- Group by Editor with Current Responsibility
- Group by Manuscript Status

Submissions with Decisions

- Submissions out for Revision (8)
- All Submissions with Editor's Decision (6)
- All Submissions with Final Disposition:
 - Accept (2), Reject (2), Withdrawn (1), Transfer (27)
- Unsent, Pending or Failed Transmittals (2)
- My Assignments with Decision (12)
- My Assignments with Final Disposition (9)

Editor 'To-Do' List

My Pending Assignments (19)

- Editorial Submissions in Progress (2)
 - New Submissions (4)
 - Revised Submissions (0)
 - New Submissions Requiring Assignment (0)
 - Revised Submissions Requiring Assignment (1)
 - Submissions Sent Back to Author for Approval (8)
 - Incomplete Submissions (1)
 - New Assignments (0)
 - Submissions with Required Reviews Complete (0)
 - Submissions Requiring Additional Reviewers (1)
 - Submissions with One or More Late Reviews (0)
 - Submissions with Active Discussions (2) **2**
- Reviews in Progress (0)
- Reviewers Invited - No Response (0)
 - Submissions Under Review (0)



Editor Signposting

- Easy to configure and changes will take effect on the Editor's Main Menu immediately!

PolicyManager > Configure Warning Thresholds

Editorial Submissions in Progress

Needs Attention: Days since submission began

Late: Days since submission began

Transferred Submissions

Needs Attention: Days since initial date submitted

Late: Days since initial date submitted

New Ingested Submissions

Needs Attention: Days since Transferred Submission Received via Ingest

Late: Days since Transferred Submission Received via Ingest

Ingested Submissions Returned to Publication

Needs Attention: Days since Submission Returned to Publication via Ingest

Late: Days since Submission Returned to Publication via Ingest

Revised Ingested Submissions

Needs Attention: Days since the revision was received via Ingest

Late: Days since the revision was received via Ingest

New Submissions

Needs Attention: Days since initial date submitted

Late: Days since initial date submitted

RoleManager > View Warning Status Signposts

Add Attachments to External Correspondence

View All Submissions

View Completed Reviews Grid in Main Menu

View Warning Status Signposts

View Additional Manuscript Details

Edit Additional Manuscript Details



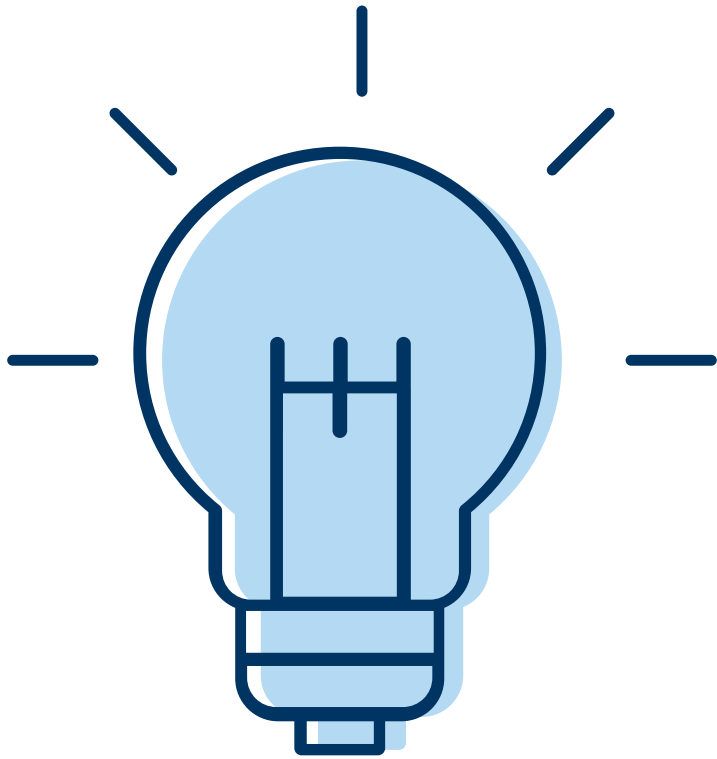
EAR Reports: Data to Support Editors

- There are several EAR reports that provide key indicators of performance and insight into trends
- They can be scheduled to run at certain times, and automatically emailed to select recipients



Average Days to Decision by Editor
Completed Reviews Detail Report
Editor Submission Counts - All editors by Role
Editor Submission Counts - Editors at End of Chain
People and Classifications
People and Institutions
People Detail Sheet Subreport
People List Subreport
Reviewer Thank-You List
Status of Submissions Received in selected timeframe
Submission Turnaround Times - Editorial
Submissions Accepted - by Country and Year
Submissions Received - by Article Type and Year
Submissions Received - by Country and Year
Submissions Received - by Month and Year





Gathering Information

Identity Confidence Check

- Assess Authors, Co-Authors, and suggested Reviewers
- Not just a flagging mechanism! Also highlights the amount of previous activity, existence of an authenticated ORCID
- The journal determines the level of importance of each of five factors:

Factor	Level of Importance 1 = lowest 5 = highest	Corresponding Author	Co-Authors	Suggested Reviewers **	
Email Domain	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Configure
Institution *	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Configure
Country or Region	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure
EM Activity	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Configure
ORCID Activity	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Configure



Custom Submission Questions

- A great way to gather pertinent information about your Authors
- Submission flags can be used in combination to alert the Editorial Office

Initial Question

Question text:
Have you received a grant from an outside agency?

Instructions for Author Response:
Please select yes or no.

"Text" and "Notes" responses can contain any mix of characters and numbers. A "Date" response must be entered in a mm/dd/yyyy format. "Integer" and "Decimal" responses can contain only a number or decimal point. A "List" response type requires the Author to select from the predefined response values.

Response Type: List **List Type:** Drop-down list (Allows for a null or single value selection)

When configuring the default value, please note that only the value "Please select a response" will force the author to select another answer. Any other value will count as a valid response.

Display Order	Default Value	Value	Description	Flag
	<input checked="" type="radio"/>	Please select a response		Associate with Flag
1	<input type="radio"/>	1	Yes	<input checked="" type="checkbox"/> Remove Flag
2	<input type="radio"/>	2	No	Associate with Flag Hide
3	<input type="radio"/>	<input type="text"/>	<input type="text"/>	

Save Item

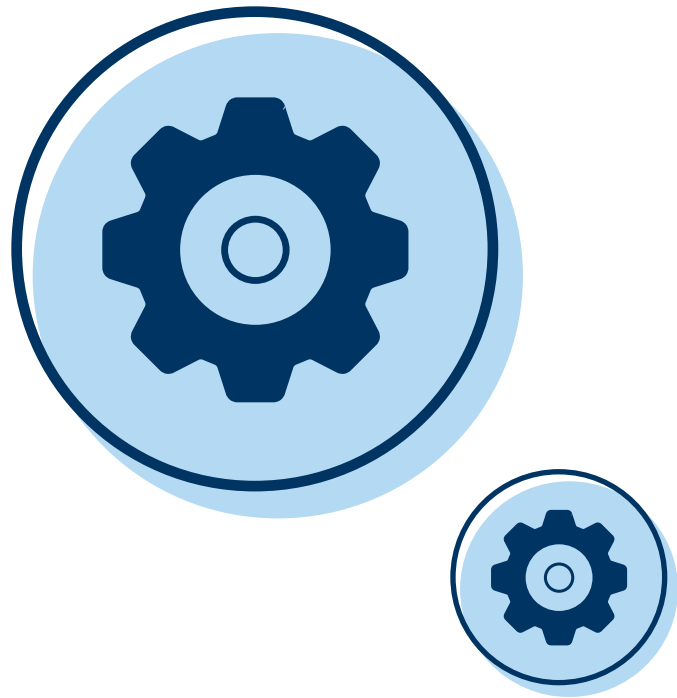


Editor Forms

- Allow the journal to collect specific information from Editors
- Forms can be tailored per role

Editor Role / Article Type	Managing Editor 2	えちとる	Editorial Assistant
Original Research Article	test Editor Form ▼	test Editor Form ▼	Associate Editor Form ▼
Review	Associate Editor Form ▼	test Editor Form ▼	Associate Editor Form ▼
Rapid Communication	test Editor Form ▼	test Editor Form ▼	Associate Editor Form ▼
Case Report - Co Author Verify AT	test Editor Form ▼	Associate Editor Form ▼	test Editor Form ▼
Letter to the Editor	test Editor Form ▼	test Editor Form ▼	test Editor Form ▼
Commentary	test Editor Form ▼	test Editor Form ▼	test Editor Form ▼
Symposium	test Editor Form ▼	test Editor Form ▼	test Editor Form ▼
Special Issue Article	test Editor Form ▼	test Editor Form ▼	test Editor Form ▼





Moving Things Along

Editor Assignment Chains

- Editor Chains can be configured per Article Type
- Allows for the quick assignment of multiple Editors
- Each Editor can be set up to get a different letter, or no letter at all

Article Type Configuration



Editor Parameters	New and Revised Submissions
Editor Assignment Chain Template:	<input type="text" value="Three Editor Chain - EIC - ME - AE"/>

Select an Assignment Chain Template to allow the entire Editor Chain to be assigned in one action, not just the first Editor.

Edit Editor Assignment Chain Template Details

Three Editor Chain - EIC - ME - AE

[Insert Special Characters](#)

Description*

	Role	Assignment Letter
	Editor-in-Chief	<input type="text" value="None"/>
	Managing Editor 2	<input type="text" value="Editor Assianment"/>
	Associate Editor	<input type="text" value="Editor Assianment"/>



Automatic Editor Summary Reminders

- Editor reminders can be sent to specific roles
- This is a one-and-done set-up that triggers an automated email to Editors that contains folder and assignment information

Associate Editor ■ Send Reminders

Frequency (Days)*

Next Reminder Due

Summary Letter*

Include Author List

Include Abstract

Include Folders*

	Always	Needs Attention	Late
<input checked="" type="checkbox"/> New Invitations	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> New Assignments	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Submissions with Rescinded Decision	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Submissions with Required Reviews Complete	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Submissions Requiring Additional Reviewers	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Submissions with One or More Late Reviews	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Reviewers Invited - No Response	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Submissions Under Review	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Group by Editors I Assigned	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Group by Editor with Current Responsibility	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Group by Manuscript Status	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>


Editor-in-Chief ■ Send Reminders

Frequency (Days)*



Decision Phrases

- If you have multiple decision letters per Editor or per theme, Decision Phrases are for you!
- Allows the Editor to select an appropriate phrase to be inserted into the Author notification letter

Current Editor Decision Phrase List		+ Add Editor Decision Phrase
 	Your MS is being rejected because it does not comply with our rigorous standards.	
 	The editors were delighted with your recent contribution to our Special Issue on Birdwatching in the Northeast.	
 	You Image of the Month was incredible, and we cannot wait to put it on our cover!	
+ Add Editor Decision Phrase		

[Create/Edit Editor Forms](#)

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

[Return to PolicyManager](#)



Decision Phrases

- These phrases can be specific to an Editor, or perhaps contain a standard response for certain situations

Responses to custom review questions are not available for this revision of the submission.

Editor Review Questions

*This is a test for the editor form (Limit 200 Characters)

Character Count: 0

Editor Decision Phrases

Editor Decision Phrases available for inclusion in the Decision Letter are displayed below. Select the phrases you wish to include.

Select Phrase

- Your MS is being rejected because it does not comply with our rigorous standards.
- The editors were delighted with your recent contribution to our Special Issue on Birdwatching in the Northeast.
- You Image of the Month was incredible, and we cannot wait to put it on our cover!

Cancel Save & Submit Later Proof & Print Proceed

Preview Letter - Editor Decision - Accept

Close

Ref.: Ms. No. DEMO-AR194
Bluejays at the birdfeeder - Friend or Foe
DEMO AM Site (CS Site)

May 12 2023 05:08:05:427PM

Dear Sir Author,

I am pleased to tell you that your work has now been accepted for publication in DEMO AM Site (CS Site).

It was accepted on %FINAL_EDITOR_DECISION_DATE%

Your Image of the Month was incredible, and we cannot wait to put it on our cover!

Comments from the Editor and Reviewers can be found below.

Thank you for submitting your work to this journal.

With kind regards

Ann M McLaughlin
Managing Editor 2
DEMO AM Site (CS Site)

Comments from the Editors and Reviewers:



Batch Functionality

- One of most widely requested features!
- Allows batch assignment of Editors from the following folders:
 - New Submissions Requiring Assignment
 - Revised Submissions Requiring Assignment
 - New Assignments
- Can also be used to move all assignments from one Editor to another



Batch Functionality

- RoleManager permission
- %EDITOR_REPLACEMENT% merge field to insert both the old and new Editors
- Editor Re-assignment requires a letter in the batch assignment family

Batch Assign to Editor - Select Submissions

Select the submissions to be assigned. For publications that assign manuscript numbers manually, submissions that have not yet received a manuscript number cannot be assigned to an Editor. These submissions are not listed below.

Page: 1 of 1 (3 total submissions) Results per page 10

Select	Manuscript Number	Article Title	Author Name	Section Category
<input checked="" type="checkbox"/>	DEMO-AR191	Test transfer to non IJRS linked journal	Mary Merge	
<input checked="" type="checkbox"/>	DEMO-AR192	Trauma Services - District General Hospitals vs. Emergency Departments	Ann M McLaughlin	
<input checked="" type="checkbox"/>	DEMO-AR193	testing	Ann M McLaughlin	

Cancel Proceed

Batch Assign to Editor - Confirm and Customize Letter

You are assigning 3 submissions to the Editor below.

Click **Customize** to personalize the assignment letter to this Editor. Once you have customized the letter, an asterisk appears next to the Editor's name. If you do not customize the letter, the default version will be sent.

You may select a different letter from the drop-down **Letter** list, if additional letters have been configured. Note: if you personalize a letter and then select a different letter, your personalized text will be lost.

To complete the batch assignment without sending a letter to this Editor, check the **Do Not Send Letter** box.

Editor Being Assigned

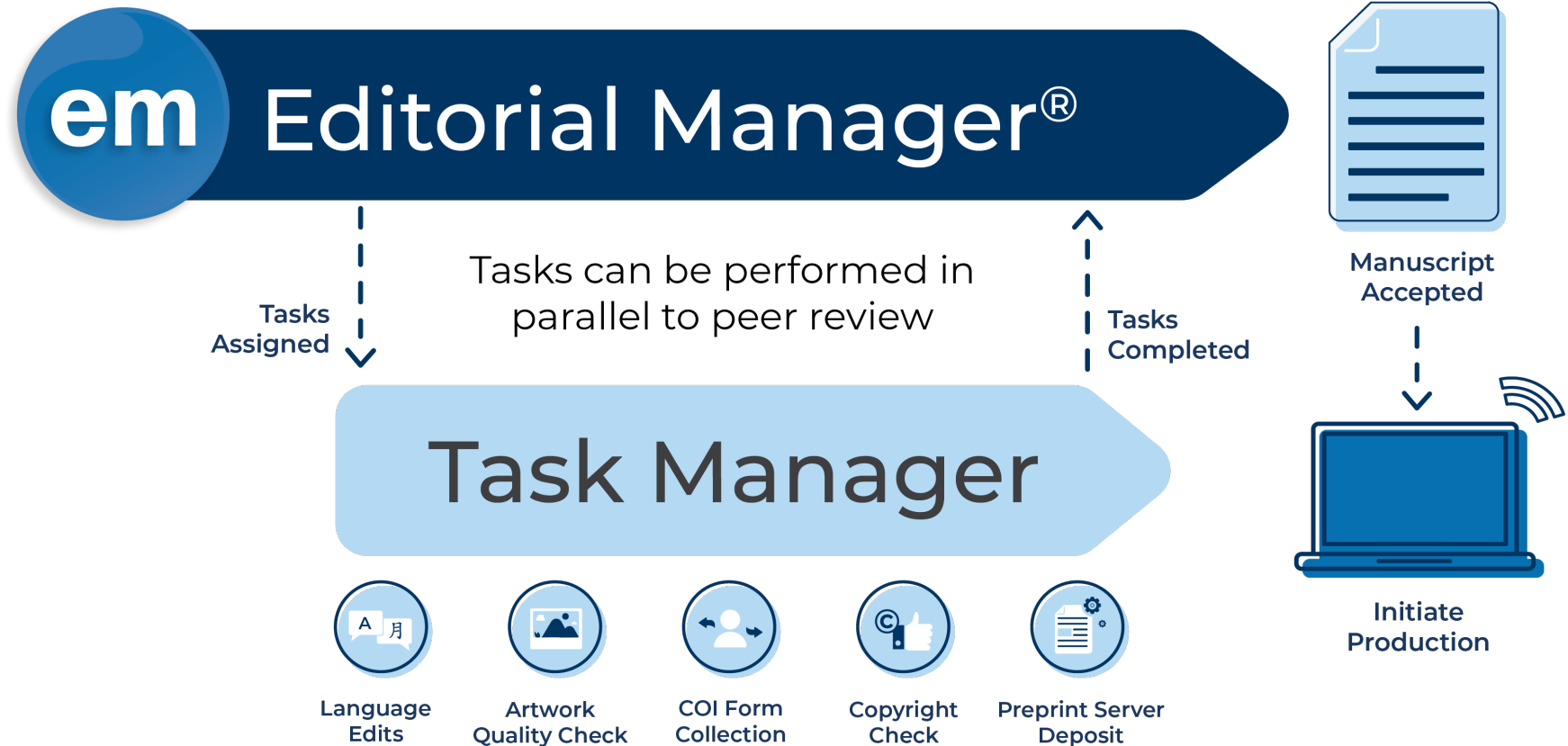
Name	Letter	Customize	Do Not Send Letter
Ale Stewart (Associate Editor)	Editor Assignment	Customize	<input type="checkbox"/>

Cancel Confirm Batch Assignment



Task Manager

- Assign, complete, and track important editorial tasks prior to production
- At any time in the editorial workflow, without access to a production tracking system
- Tasks can be completed in parallel and can be assigned only as relevant



Task Manager and Batch Assignment

- Submission tasks can also be assigned using batch functionality. The submission task itself must be configured to allow batch assignment.

Task Manager Automatic Assignment Options

If this task is configured as a part of the Task Manager Workflow for an Article Type, the following events can be configured to automatically assign the task.

- Assign automatically at new submission
- Assign automatically at revision
- Assign automatically when author returns submission to publication
- Assign automatically when editor edits and approves submission

Automatically End Production or Task Manager when the Task is Completed and there are No Other Open Tasks in the Workflow.

- End Production/Task Manager Automatically after this task is Completed

Batch Assignment can be triggered on either a set of submissions selected from the Search Submissions Results Production view, or all Submissions in a Schedule Group selected from the Manage Schedule Groups folder. Only tasks that are specifically configured to allow batch assignment can be used in these cases. Tasks that are configured for Assignment to 'Corresponding Author Only' cannot also be configured to Allow Batch Assignment.



Task Manager and Batch Assignment

em Ann's Demo Site

MY HOME Main Menu Submit a Manuscript About Help Shortcuts

Important Message: Site under development. Do not use for live manuscript submission.

Quicklinks Batch Actions

Search Submissions - Search Results

Manuscript Number is containing '1'

Page: 1 of 1 (69 total submissions)

Select	Action	Article Type	Manuscript Number	Article Title	Current Status	Status Date
<input checked="" type="checkbox"/>	<ul style="list-style-type: none">View SubmissionManuscript Analysis ServicesView Reference Checking ResultsDetailsInitiate DiscussionHistoryTechnical InformationFile InventorySolicit CommentaryClassificationsSet Final Disposition	Rapid Communicati	DEMO-AR195	Pet Emergencies and the riding cost of pet care.	Sent Back to Author	Jun 6 2023 4:54:22:830PM



Resources

- EM Help Articles
- Aries Video Library
- EM/PM Release Notes
- Aries Blog & Newsletter
- Your Account Coordinator!





Questions?

Thank you!

Stay Connected

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Amclaughlin@ariessys.com

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