

EEMUG 2020

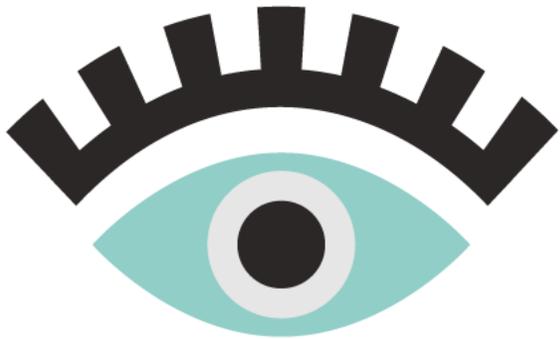


#EEMUG2020





Transfers, Preprint Servers, MECA and more



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#EEMUG2020



Agenda

- Transferring Submissions *In*
 - EM Ingest & Preprint Servers
 - Imports in from “Sister Journals”
 - MECA Import
- Transferring Submissions *Out*
 - Reject and Transfer
 - EM to non-EM/MECA
 - Preprint Servers
- Configurations



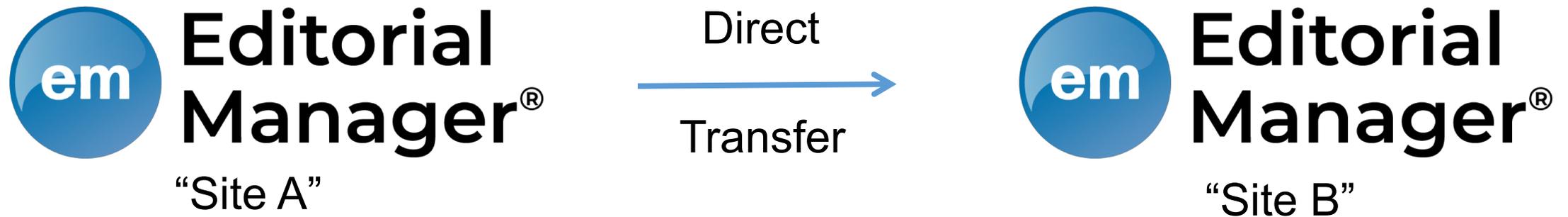
Transferring Submissions In to EM

- **EM-to-EM transferred submissions**
 - Direct database to database copy
- **EM Ingest – manuscript import into EM**
 - Submissions come from an outside submission partner or preprint server, SFTP'ed into Editorial workflow
 - EM pushes to submission partner via API
- **“Sister Journal” manuscript import into EM or PM**
 - Submissions come from a non-EM journal → Editorial workflow or Production Workflow – various types of XML accepted (JATS, Cadmus, etc).
 - MECA Import (Manuscript Exchange Common Approach) – “standard” zip/XML format for import into Editorial Workflow

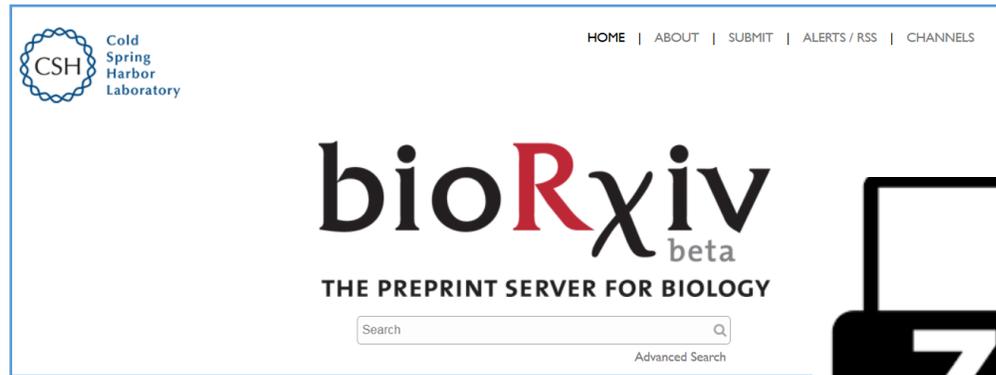


EM to EM transfer

- Behind the scenes database to database transfer



EM Ingest - Submission Partner & Preprint Server Integrations via SFTP to EM



EM
Ingest

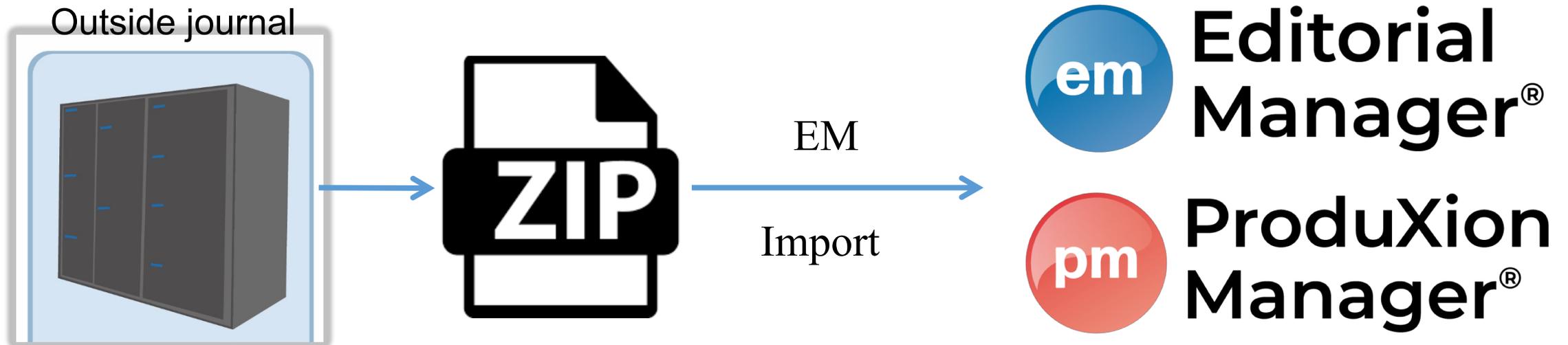


Editorial
Manager®



“Sister Journal” manuscript import into EM or PM via SFTP to EM/PM

- Editorial or Production Workflow using various types of XML
- Editorial Workflow using MECA method



Transfers into EM – Editor Main Menu Folders

Three Ingest-related folders

- New Ingested Submissions
 - Holds new revision 0 submissions ingested via FTP from a submission partner
- Ingested Submissions Returned to Publication
 - Holds submissions and revisions returned from submission partner (via SFTP) after ‘Send Back to Author’
- Revised Ingested Submissions
 - Holds revised submissions returned from submission partner (via SFTP) after Editor decision in ‘Revise’ decision family

Transferred Submissions folder

- Holds submissions transferred from another EM journal, or imported from another peer review system



Editor Main Menu folders

Editor 'To-Do' List

My Pending Assignments (113)



Transferred Submissions (59)

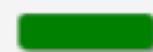
Ingested Submissions (66)



New Ingested Submissions (43)



Ingested Submissions Returned to Publication (6)



Revised Ingested Submissions (17)



New Submissions Requiring Assignment (38)



Revised Submissions Requiring Assignment (1)



Transfers into EM – Editor Main Menu Folders

Post-Transfer processing (Manual)

- Submission can be manually Sent Back to Author for additional information/files needed on receiving journal
- EM PDF must be built and approved
- Editor Role must approve the transfer by clicking “Transfer Complete” action link
- Submission then goes into “New Submissions”, “New Submissions Requiring Assignment”, or “Direct-to-Editor New Submissions” folder



Transfers into EM – Editor Main Menu Folders

Post-Transfer processing (Automated)

- Submission can be Sent Back to Author automatically
- EM PDF can be built automatically
- Transfer can be approved automatically
- After approval, submission goes directly into “New Submissions”, “New Submissions Requiring Assignments”, or “Direct-to-Editor New Submissions” folder



EM ingest – Post-ingest Status updates

- API pushes from EM:
 - Notify external partner of success/failure
 - Submission sent back to Author (metadata and files)
 - Revise decision (metadata and files)
 - Transfer (metadata and files)
 - Correspondence to Author/co-authors
- Submission can be modified on external site, and re-ftp'ed to EM after Send Back to Author or Revise decision.
- Submission can be transferred back to Submission partner for transfer to another journal.



Transfers into EM – Post-transfer status updates

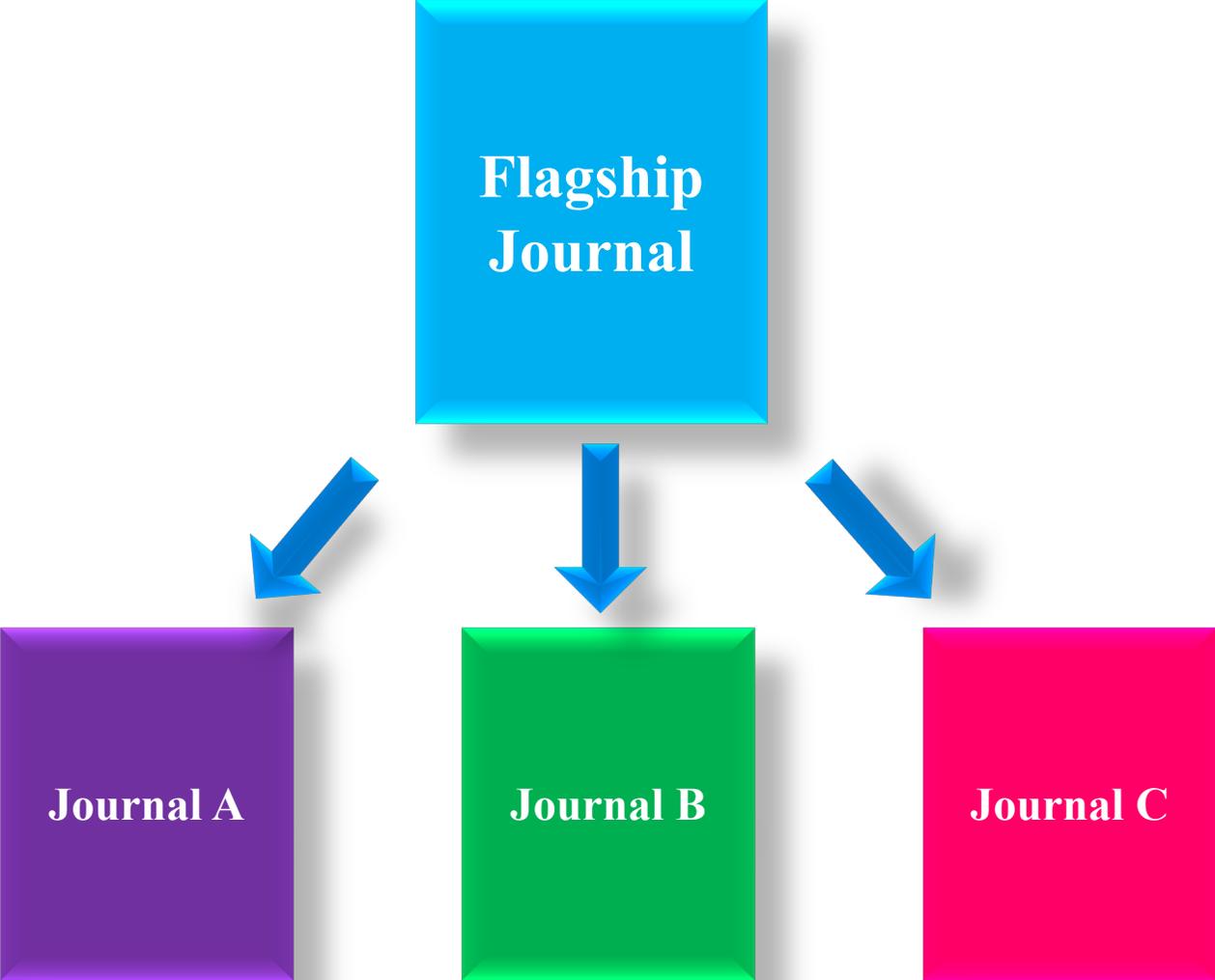
- **Notification Services:** uses webhooks to deliver messages to customer-specified endpoints as workflow events occur
 - Users can configure endpoints to which notifications should be sent, and select the workflow events that will trigger these notifications
- **Web Services:** allow publishers to retrieve detailed submission data at any time
 - Publication has a Web Services account registered with Editorial Manager
 - Publication sends the GET request in the specified format, and results are returned
 - Information delivered in either XML or JSON



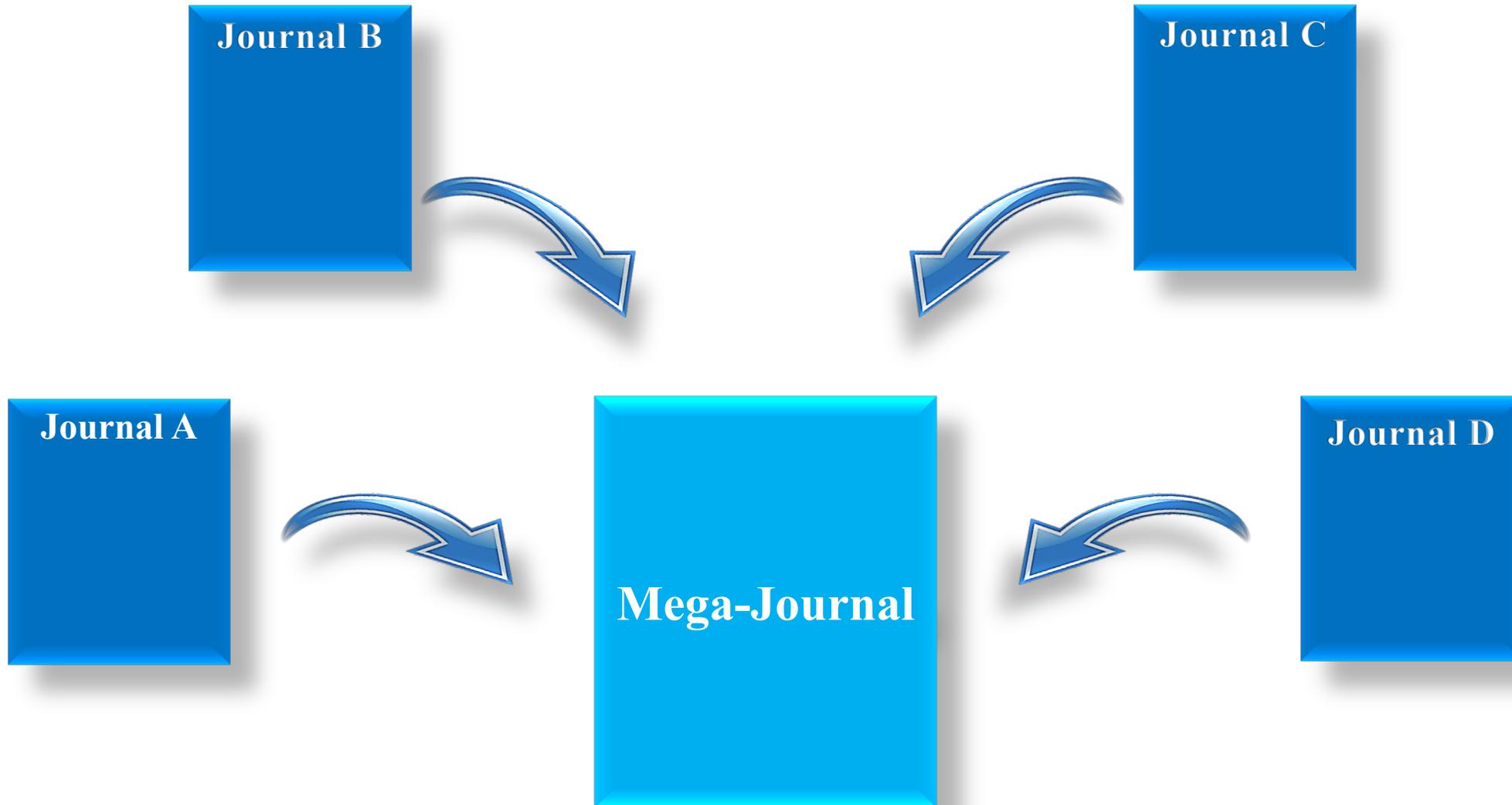
Transferring Submissions Out



Flagship Journal Transfers to Other Publications



Many Journals Transfer to Mega-Journal



Types of Transfer Out

- EM-to-EM (direct database transfer)
- EM-to-**non-EM** via SFTP
 - External Transfer Method
 - MECA Transfer Method



Transfers Out

- When can submissions be transferred out?
 - At submission OR
 - After Author is notified of final decision
- Who triggers the transfer?
 - An Editor → by setting the Final Disposition to Transfer
 - An Author → by agreeing to transfer the submission as part of the Reject & Transfer decision workflow



Editor Notifies Author of “Reject and Transfer” Decision

- Editor proposes Transfer Target Publications to Author
- Author chooses Target Journal



Editor Selects Transfer Target Publications to be presented to Author

Select Transfer Target Publications

Please select up to **3 publications** to be presented to the Author as transfer targets. If you click on the "Proceed" button and then wish to change the list of target publications before the Author is notified, you may return to this page to change your selections.

<input checked="" type="checkbox"/> Lauren's 15.1 Test Site	EM Website
<input checked="" type="checkbox"/> Tony's 15.1 Test Site	EM Website
<input checked="" type="checkbox"/> Aries Target One	Non-EM Publication Website
<input type="checkbox"/> Aries Target Two	Non-EM Publication Website



“Reject with Option to Transfer” Workflow

Decision Letter in:

“reject and transfer”
Decision Family



Editorial Workflow

No response from author



“Transfer Window”

Final Disposition: “reject”

Author clicks transfer
“deep link” to:

Decline transfer



Final Disposition: “reject”

Accept transfer



Final Disposition: “transfer”



Author Agrees to Transfer the Submission

Transfer Submission

The Editor has suggested that your submission may be better suited for a different publication.

If you do not wish to transfer your submission you may select the radio button "DO NOT TRANSFER SUBMISSION" and click on the submit button. If you agree to transfer your submission, please select the radio button for the publication and click on the "Submit" button.

- DO NOT TRANSFER SUBMISSION
- Lauren's 15.1 Test Site [EM Website](#)
- Tony's 15.1 Test Site [EM Website](#)
- Aries Target One [Non-EM Publication Website](#)

Cancel

Submit

Agree to Transfer Submission Confirmation

Thank you for agreeing to transfer Manuscript Number SallyDev151-2019-23 to Tony's 15.1 Test Site.

[Main Menu](#)



Transferred Submissions – Sending Site

Editorial

Proposal Menu

Production Tasks

Managing Editor Main Menu

Submissions With:

0 Reviews Complete
4

1 Reviews Complete
1

2 Reviews Complete
0

3 Reviews Complete
0

4 Reviews Complete
0

Submissions with Decisions

Submissions out for Revision (14)

All Submissions with Editor's Decision (36)

All Submissions Pending Transfer (1)

All Submissions with Final Disposition:

Accept (118), Reject (15), Withdrawn (16), **Transfer (105)**

Unsent, Pending or Failed Transmittals (16)

Completed Conference Submissions (5)

Withdrawn Conference Submissions (1)

My Assignments with Decision (24)

My Assignments Pending Transfer (1)

My Assignments with Final Disposition (89)

Paper moves to "Final Disposition - Transfer" folder on sending site



Transferred Submissions – Sending Site

Quicklinks

▼ Collapse

All Submissions with Final Disposition Transfer - Sally Editor, PhD

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

Page: 1 of 1 (134 total submissions)

1

250 results per page.

Action	Manuscript Number	Article Title	Article Type	Author Name	Transferred To	Initial Date Submitted	Status Date	Current Status	Editor's Name	Final Disposition	Editor Decision
View Submission Duplicate Submission Check (100%) Details History File Inventory View Reviews and Comments Similar Articles in MEDLINE Send E-mail Resend Transfer	SallyDev151-2019-23R1	Reject & Transfer Workflow	Original Study	Buzz Lightyear Aldrin PhD	TONYDEV151 - Tony's 15.1 Test Site	Jun 5 2019 5:12PM	Jun 5 2019 5:38PM	Submission Transferred	Sally Editor PhD	Transfer	Reject and Transfer
View Submission Duplicate Submission Check (73%) Details History File Inventory View Reviews and Comments Similar Articles in MEDLINE Send E-mail Resend Transfer	SallyDev151-2019-9	Testing footer	Original Study	Sally Editor PhD	TONYDEV151 - Tony's 15.1 Test Site	Apr 18 2019 10:43AM	Jun 5 2019 4:54PM	Submission Transferred	Sally Editor PhD	Transfer	Reject and Transfer
View Submission Duplicate Submission Check (100%) Details History File Inventory View Reviews and Comments Similar Articles in MEDLINE Send E-mail Resend Transfer	SALLYDEV150-	"Submit Early Decision" is a		Buzz Lightyear	TONYDEV151 -	Jun 6 2018	May 6 2019	Submission			Reject

- "Transferred To" site is displayed on grid in "Final Disposition - Transfer" folder
- "Reject and Transfer" submissions have a link to the Decision Letter



Transferred Submission – Sending Site (Details page)

Details for Manuscript Number: SallyDev151-2019-23R1 "Reject & Transfer Workflow"

[Cancel](#) [Save](#) [Save and Close](#)

[Abstract](#) [Manuscript Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Reviewers Proposed by Editors](#) [Additional Information](#) [Production Notes](#)

Early Proof URL:	The Early Proof is not yet available [Edit]
Full Title:	Reject & Transfer Workflow
Manuscript Number:	SallyDev151-2019-23
Corresponding Author:	Buzz Lightyear Aldrin  , Massachusetts Institute of Technology    Cambridge, MA UNITED STATES [Proxy]
Corresponding Author E-Mail:	buzz@ariestrash.com
First Author:	Buzz Lightyear Aldrin, PhD  , Massachusetts Institute of Technology, buzz@ariestrash.com    [Proxy]
All Authors Secondary Information:	
Other Authors:	Richard Feynman, PhD California Institute of Technology   Author Status
All Authors:	Buzz Lightyear Aldrin  , PhD, Massachusetts Institute of Technology Massachusetts Institute of Technology    [Proxy] Richard Feynman  , PhD California Institute of Technology  Author Status
Transfer Information	
Transfer Offer Expiration Date:	Jul 05 2019 11:59PM
Transferred to:	TONYDEV151 - Tony's 15.1 Test Site
Global MS ID:	EM_SALLYDEV151_2852 [Edit]
Short Title:	
Article Type:	Original Study



Transferred Submission – Receiving EM Site

Quicklinks Collapse

Transferred Submissions - Mary François Smith, PhD

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

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

Action	Article Type	Article Title	Author Name	Transferred From	Initial Date Submitted	Status Date	Current Status
Details History View Transferred Information View Transferred Decision Letter File Inventory Edit Submission Send Back to Author Remove Submission Send E-mail	Original Study	Reject & Transfer Workflow	Buzz Lightyear Aldrin PhD	SALLYDEV151 - Sally's 15.1 Test Site	Jun 5 2019 5:38PM	Jun 5 2019 5:38PM	Transferred Submission Received

On receiving EM journal, submission moves to:

- Author's "Submissions Sent Back to Author" folder OR
- Editor's "Transferred Submissions" folder OR
- Editor's "New Submissions", "New Submissions Requiring Assignment" or "Direct-to-Editor New Submissions" folder if the publication is configured to automatically build the PDF and automatically mark the submission as "Transfer Complete"

Transferred Submission – Receiving EM Site

Quicklinks Collapse

Transferred Submissions - Mary François Smith, PhD

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

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

Action	Article Type	Article Title	Author Name	Transferred From	Initial Date Submitted	Status Date	Current Status
<ul style="list-style-type: none">DetailsHistoryView Transferred InformationView Transferred Decision LetterFile InventoryEdit SubmissionSend Back to AuthorRemove SubmissionSend E-mail	Original Study	Reject & Transfer Workflow	Buzz Lightyear Aldrin PhD	SALLYDEV151 - Sally's 15.1 Test Site	Jun 5 2019 5:38PM	Jun 5 2019 5:38PM	Transferred Submission Received

- Details
- History
- View Transferred Information
- View Transferred Decision Letter
- File Inventory
- Edit Submission
- Send Back to Author
- Remove Submission
- Send E-mail



What Metadata is Transferred EM-to-EM?

- Corresponding Author information
 - Link to an existing People record or create a new record
 - Name, Address, ORCID, CRediT Roles, Institution, Ringgold ID
- Co-Author Information
 - Name, Address, ORCID, CRediT Role, Institution, Ringgold ID, Co-Author Verification Status
 - Verification may be reset at “Transfer Complete” for the receiving site’s Article Type
- Article Type and Submission Items
 - If there is a matching Custom Metadata ID, Article Type, or Submission Item
- Submission metadata entered by the Author
 - e.g. Title, Abstract, Keywords, Funding Information



What Metadata is Transferred EM-to-EM? (cont'd)

- Questionnaires - Author, Co-Author, and Submission
 - Responses are transferred if there is a matching Article Type with a Questionnaire, AND a Custom Metadata ID or Question String Match, AND a matching response type
- Source Files
 - Submission Item Types (if there is a matching name or Custom Metadata ID)
- Reviews
 - If the Reviewer agrees; may include identifying information
 - Displayed on the 'Transferred Information' page
 - Included in the Decision Letter and/or Transfer Letter via merge code
 - Read-only on the receiving site; Reviewer records are not created for each transferred review / Reviewer
 - Reviews can only be transferred from the journal on which the Reviewer submitted the review to the receiving journal
 - Review information received via transfer cannot be transferred to subsequent sites



Transferred Submissions folder – Receiving EM Site

Quicklinks Collapse

Transferred Submissions - Mary François Smith, PhD

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

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

Action	Article Type	Article Title	Author Name	Transferred From	Initial Date Submitted	Status Date	Current Status
<ul style="list-style-type: none">DetailsHistoryView Transferred InformationView Transferred Decision LetterFile InventoryEdit SubmissionSend Back to AuthorRemove SubmissionSend E-mail	Original Study	Reject & Transfer Workflow	Buzz Lightyear Aldrin PhD	SALLYDEV151 - Sally's 15.1 Test Site	Jun 5 2019 5:38PM	Jun 5 2019 5:38PM	Transferred Submission Received

- Details
- History
- View Transferred Information
- View Transferred Decision Letter
- File Inventory
- Edit Submission
- Send Back to Author
- Remove Submission
- Send E-mail



Receiving Site – Transferred Information page

- Corresponding Author information
- Information about each version of the submission:
 - View Transferred Submission
 - View Transferred Decision Letter
- Transferred reviews (with Reviewer's consent):
 - Reviewer's identity
 - Recommendation term
 - Overall Reviewer manuscript rating
 - Review dates
 - Transfer authorization questions and responses
 - Reviewer comments to Author
 - Reviewer comments to Editor



Receiving Site – Transferred Information page

Original Submission

Dr. Buzz Lightyear Aldrin (Corresponding Author)
[View Transferred Submission](#)
[View Transferred Decision Letter](#)

Attachments:

Action	Description	File Name	Size	Last Modified
Download	Editor Attachment	Editor_AttachmentR0.docx	12.4 KB	Jun 05 2019 05:38PM

Reviewer 1
(This Reviewer declined to transfer identifying information.)

Reviewer 2
Roger Rabbit, PhD

Revision 1
Dr. Buzz Lightyear Aldrin (Corresponding Author)

- *Transferred Information* page displays information about each revision and each review
- Reviewers have choice to transfer their reviews and/or their identifying information



What data is Transferred EM-to-non-EM? (i.e. to an outside journal)

- **External Transfer Method (via SFTP)**
 - All files for *all versions* of the submission
 - A single XML file that contains submission metadata for all versions of the submission including reviews (if the Reviewer agreed)
 - The receiving non-EM/outside site must import the submission
- **MECA Transfer Method (via SFTP)**
 - Emerging NISO recommended practice (target approval Q1 2020)
 - All files for *highest revision* of the submission
 - Multiple XML files for submission, manifest, peer review and transfer metadata



MECA package – what is it?

- Zip File sent by SFTP:
 - **Manifest.xml** (new DTD for file manifest)
 - **Transfer.xml** (new DTD for source/destination, contact, and security information)
 - **Article.xml** (JATS-compliant) - highest revision of the submission
 - **Reviews.xml** (optional - JATS-like) - reviews for multiple revisions
 - Source files (for the *highest revision* of the submission)
 - Reviewer Attachments (for *all revisions* of the submission)
- The receiving site must import the submission.



Transfers and Transfer Offers Reporting View

- Available in:
 - Single-journal Enterprise Analytics Reporting
 - Cross-Publication Enterprise Analytics Reporting
 - Custom Reports
- Report data:
 - Submissions that have been transferred in or out of a publication
 - Submissions for which the publication has made a transfer offer to the Author (via the "Reject & Transfer" decision workflow)
- The reporting view returns one row for each transfer target publication (accepted or declined) presented to the Author.



Export to Preprint Server

- MECA zip “package” is also available as a Task Export using SFTP
- The receiving vendor, preprint server or other system must be able to parse / import the MECA package
- Other XML types also available (e.g. JATS)
- Submission remains in EM/PM



Configuration

AdminManager | PolicyManager | RoleManager | ActionManager



AdminManager

AdminManager Main Menu

Set Live Journal Flag

Configure Enterprise Analytics Reporting Menus

Set Default Target FTP Site for Extract of Conference Submissions

Share People

Configure Shared Letters Management

Configure Cross-Publication Submission Transfer

View File Transfer Statistics

Configure Restricted System Administration Access Rights

Configure Manuscript Service Providers for Ingest Service

Configure Notification Services

Configure Endpoints for Notification Services

Configure CAPTCHA to Shield Deep Links from Email Security Systems

- Click “System Administrator Functions” link on the Editor Main Menu
- Select AdminManager
- Then click the link

AdminManager- Configure Cross-Publication Submission Transfer

Configure Cross-Publication Submission Transfer

Cancel

Submit

Confirming submission transfer relationships is the responsibility of the publications involved.

Please select the box(es) below to enable the transfer of submissions to or from other Editorial Manager sites. You may also designate non-Editorial Manager publications as target sites for submissions transferred from your site. Please enter e-mail addresses to receive notification when a transferred submission is received or in the case of a transfer error.

- You may add other Editorial Manager publications that are not in a People Sharing Group, in the "Other Editorial Manager Publications" section. Please enter a publication's Editorial Manager acronym and click the "Add" button. Any publication to which you would like to transfer submissions must confirm this relationship by entering your publication's acronym on its site.
- You may also configure non-Editorial Manager publications as recipients of transferred submissions in the "Target Non-Editorial Manager" section.

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

Publications are responsible for confirming the transfer relationships!

AdminManager – Configure Cross-Publication Submission Transfer, cont'd

Configure Transfer Target Publications

Enable cross-publication submission transfer for EM publications in a People Sharing Group

Enable cross-publication submission transfer for Editorial Manager publications not in a People Sharing Group

Other Editorial Manager Publications:

Publication	Current Status	
DEMO131	Confirmed	Remove

Other Editorial Manager Publication (enter publication code)

Publications can enable transfer between sites in a People Sharing Group or any EM site.

Both sites must confirm the relationship!

AdminManager – Configure Cross-Publication Submission Transfer, cont'd

Publications
can configure
automatic:

Send Back to
Author

Build PDF

Transfer
Complete

Configure Automatic Settings for Transferred Submissions

To automatically send a submission back to the author, select the checkbox "Automatically trigger 'Send Back to Author'". Alternatively, when a transferred submission is received, the system can automatically build and approve the PDF if all required metadata and submission files are present. To enable this option, select the checkbox "Automatically trigger PDF Build Processing". When either of these checkboxes are selected, an Editor Role and individual editor must also be selected from the drop-down boxes. This editor is recorded as the sender of the 'Send Back to Author' letter and/or as the initiator of the PDF build, and will receive PDF build notifications. If both checkboxes are selected, the system will first attempt to automatically build and approve the PDF, and if this cannot be completed, the submission will be automatically sent back to the Author.

To automatically mark the submission as "Transfer Complete" and direct it to the appropriate folder when the PDF is approved, select the checkbox "Automatically mark as 'Transfer Complete' and direct to the appropriate folder when the submission PDF is approved (or was built automatically)".

Note: automatic settings for submissions received from Manuscript Service Providers are configured on the 'Configure Manuscript Service Providers for Ingest' page.

For New Submissions transferred-in from another publication:

- Automatically trigger 'Send Back to Author'
- Automatically trigger PDF Build Processing

The Editor selected below is the person recorded as the sender when a submission is automatically sent back to the Author, and is also the recipient of automatic PDF build notifications.

Editor Role: Editor:

For New Submissions transferred-in from another publication or ingested from a Manuscript Service Provider:

- Automatically marked as 'Transfer Complete' and directed to the appropriate folder when the submission PDF is approved (or was built automatically).

AdminManager – Configure Cross-Publication Submission Transfer, cont'd

Configure Transfer Time Limit

If your publication has configured a Decision Term in the "Reject and Transfer" Decision Family, you may define a transfer time limit during which the Author can agree or decline to transfer a submission to one of the target sites configured below. If the deadline passes and the Author has not agreed to transfer, Final Disposition will be set automatically to "Reject", and the submission will not be transferred. You may enter a number between 1 and 90 in the box below.

Automatically Set Final Disposition to "Reject" if the Author does not agree to transfer a submission within days.



- A transfer time limit can be configured for "Reject and Transfer" decision workflow
- If Author does not agree to transfer the submission within this time limit, Final Disposition is automatically set to "Reject"

AdminManager – Configure Cross-Publication Submission Transfer, con'td (to Non-EM site)

Enable cross-publication submission transfer to non-Editorial Manager publications

Non-Editorial Manager Publications

Publication	Publication Website		
Aries Target One	http://www.edmgr.com	Edit	Remove
Aries Target Two	http://www.edmgr.com	Edit	Remove

- Click [Add] button to add a non-EM transfer target site
- Click "Edit" link to edit information about an existing external site

AdminManager – Configure Cross-Publication Submission Transfer, cont'd

Edit Publication for FTP Transfer

[Insert Special Character](#)

Publication Name:	<input type="text" value="Aries Target One"/>
Publication URL:	<input type="text" value="http://www.edmgr.com"/>
Transfer Method:	<div style="border: 1px solid black; padding: 2px;"><input type="text" value="None"/> <input checked="" type="text" value="ExternalTransfer"/> <input type="text" value="MECA Manuscript Transfer"/> <input type="text" value="developer.ariessc.com"/></div>
Secure FTP Server address (e.g. sftp://ftp.ariessys.com):	<input type="text" value=""/>
FTP Username:	<input type="text" value="username"/>
FTP Password:	<input type="password" value="••••••••"/>
Subdirectory:	<input type="text" value="Sally"/>



AdminManager – Configure Cross-Publication Submission Transfer, cont'd – email notifications

Restrict Transfer Target Publication(s)

When Authors are notified of a decision in the "Reject and Transfer" Decision Family, they are given the opportunity to agree or decline to transfer their submission to another publication. You may allow the notifying Editor to restrict the list of transfer targets presented to the Author.

Allow the Editor to suggest the transfer target publication(s)

Editors may suggest up to publication(s)

Configure E-mail Addresses for Notification

Transferred submission received:

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

Submission returned to publication via ingest:

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

Revision received via ingest:

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

Error during outbound transfer:

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

AdminManager

AdminManager Main Menu

Set Live Journal Flag

Configure Enterprise Analytics Reporting Menus

Set Default Target FTP Site for Extract of Conference Submissions

Share People

Configure Shared Letters Management

Configure Cross-Publication Submission Transfer

View File Transfer Statistics

Configure Restricted System Administration Access Rights

Configure Manuscript Service Providers for Ingest Service

Configure Notification Services

Configure Endpoints for Notification Services

Configure CAPTCHA to Shield Deep Links from Email Security Systems

AdminManager – Configure Endpoints for Notification Services

Configure Endpoint Details

Endpoints configured on this page can be used to receive the notification payload for one or more subscribed events. Once you have configured an endpoint on this page, go to the Configure Notification Services page to select the events at which this endpoint should be notified.

If an endpoint is placed on hold, messages to this endpoint will continue to be created and queued, but will not be sent until the on hold status is removed. Messages older than 45 days will not be re-sent when the on-hold status is removed.

If an endpoint is hidden, no messages will be created for this endpoint until it is restored.

Create New Endpoint

Actions	Name	URL	Subscribed Events	On Hold
Edit Hide Remove	Testing endpoint	https://someendpoint.somewhere.com		<input type="checkbox"/>

Create New Endpoint

Cancel

Submit

[Configure Notification Services](#)

AdminManager – Configure Notification Services

Configure Notification Services

Use this page to select the workflow events that will trigger a notification to be sent to the endpoints that you have configured for Notification Services. The events listed below can trigger the system to send a notification to any endpoints that are set up to receive notifications. Click the "Add New Endpoint" link for an event to add an endpoint to the list of endpoints that will receive notifications at the event.

Decision

Event	Endpoints Notified
Accept	Add New Endpoint
Major Revision	Add New Endpoint
Minor Revision	Add New Endpoint
Inappropriate Format	Add New Endpoint
Reject	Add New Endpoint
Convert to Brief Report	Add New Endpoint
Transfer to different publication	Add New Endpoint
<i>Reject but may be reconsidered (Hidden)</i>	Add New Endpoint
Final Disposition - Accept on Submission	Add New Endpoint
Final Disposition - Accept	Add New Endpoint
Final Disposition - Reject	Add New Endpoint

Task Status

Event	Endpoints Notified
Editor Assigned (Not Invited)	Add New Endpoint
Editor Invited for Assignment	Add New Endpoint
Editor Agree to Assignment	Add New Endpoint
Editor Declines Invitation of New Submission	Add New Endpoint
Editor Declines Invitation from an Editor	Add New Endpoint
Editor Unassigned	Add New Endpoint
Reviewer Invited	Add New Endpoint
Reviewer Assigned (Not Invited)	Add New Endpoint
Reviewer Agree	Add New Endpoint
Promote Alternate Reviewers	Add New Endpoint
Required Reviews Complete	Add New Endpoint
Required Reviews Reset	Add New Endpoint
Rescind Decision	Add New Endpoint

AdminManager

AdminManager Main Menu

Set Live Journal Flag

Configure Enterprise Analytics Reporting Menus

Set Default Target FTP Site for Extract of Conference Submissions

Share People

Configure Shared Letters Management

Configure Cross-Publication Submission Transfer

View File Transfer Statistics

Configure Restricted System Administration Access Rights

Configure Manuscript Service Providers for Ingest Service

Configure Notification Services

Configure Endpoints for Notification Services

Configure CAPTCHA to Shield Deep Links from Email Security Systems

AdminManager – Configure Manuscript Service Providers for Ingest Service

Configure Manuscript Service Providers for Ingest Service Confirmation

Publications may authorize third party Manuscript Service Provider(s) to automatically submit manuscripts via the EM Ingest Service. If the Ingest Service is authorized, please select one or more Manuscript Service Provider(s) to automatically submit manuscripts on behalf of Authors. Submissions ingested in this manner are placed in the Ingested Submissions section of the Editor Main Menu for further processing.

Authorize Manuscript Service Provider(s) to automatically submit manuscripts on behalf of Authors.

The Editor selected below is the person recorded as the sender when a submission is automatically sent back to the Author, and is also the recipient of automatic PDF build notifications.

Editor Role: Editor:

[Check All](#) | [Clear All](#)

Select Name

Website

- | | | |
|-------------------------------------|--|--------------|
| <input checked="" type="checkbox"/> | 1234567 | www.goog.com |
| <input checked="" type="checkbox"/> | Automatically build and approve PDF | |
| <input type="checkbox"/> | Automatically trigger 'Send Back to Author' for new submissions from this provider | |
| <input checked="" type="checkbox"/> | Push Editorial Status Updates to this provider | |
| <input checked="" type="checkbox"/> | Push 'Send Back to Author' information and files to this provider | |
| <input checked="" type="checkbox"/> | Push Revision information and files to this provider | |
| <input checked="" type="checkbox"/> | Push Transfer information and files to this provider at Final Disposition - Transfer | |
| <input checked="" type="checkbox"/> | Push letters for Corresponding Authors to this provider | |
| <input checked="" type="checkbox"/> | Push letters for co-authors to this provider | |

PolicyManager

ROLEMANAGER • ACTIONMANAGER • **POLICYMANAGER** • ADMINMANAGER • ADMINISTRATION HELP Role: Managing Editor Username: mary

Editor Decision Policies

- Edit Editor Decision Terms**
- Configure Editor Decision Phrases
- Create/Edit Editor Forms
- Match Editor Forms to Article Types and Editor Roles
- Editor Manuscript Rating Question Configuration
- Configure Options for Review Rating
- Configure Automatic Withdrawal of Declined Revisions

PolicyManager – Edit Editor Decision Terms

Editor Decision Terms

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

[Cancel](#) [Add New Term](#)

[Update Order](#)

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Alternative Text for Authors	Decision Family
<input type="text" value="1"/>	Accept	Editor Decision - Accept	None	Accept		Accept Remove Edit
<input type="text" value="2"/>	Revise	Editor Decision - Revise	Reviewer Notification of Revise Decision	Revise		Revise Remove Edit
<input type="text" value="3"/>	Reject	Editor Decision - Reject	Reviewer Notification of Reject Decision	Reject		Reject Remove Edit
<input type="text" value="4"/>	Revise, No Review	Editor Decision - Revise	None	Revise		Revise Remove Edit
<input type="text" value="5"/>	Reject and Transfer	Editor Decision - Reject and Transfer	None	Transfer Pending		Reject and Transfer Remove Edit
<input type="text" value="6"/>	Reject and Transfer to Journal A	Editor Decision - Reject and Transfer	None	Transfer Pending		Reject and Transfer Remove Edit
<input type="text" value="7"/>	Reject and Offer Transfer to 3 Journals	Editor Decision - Reject and Transfer	None	Transfer Pending		Reject and Transfer Remove Edit

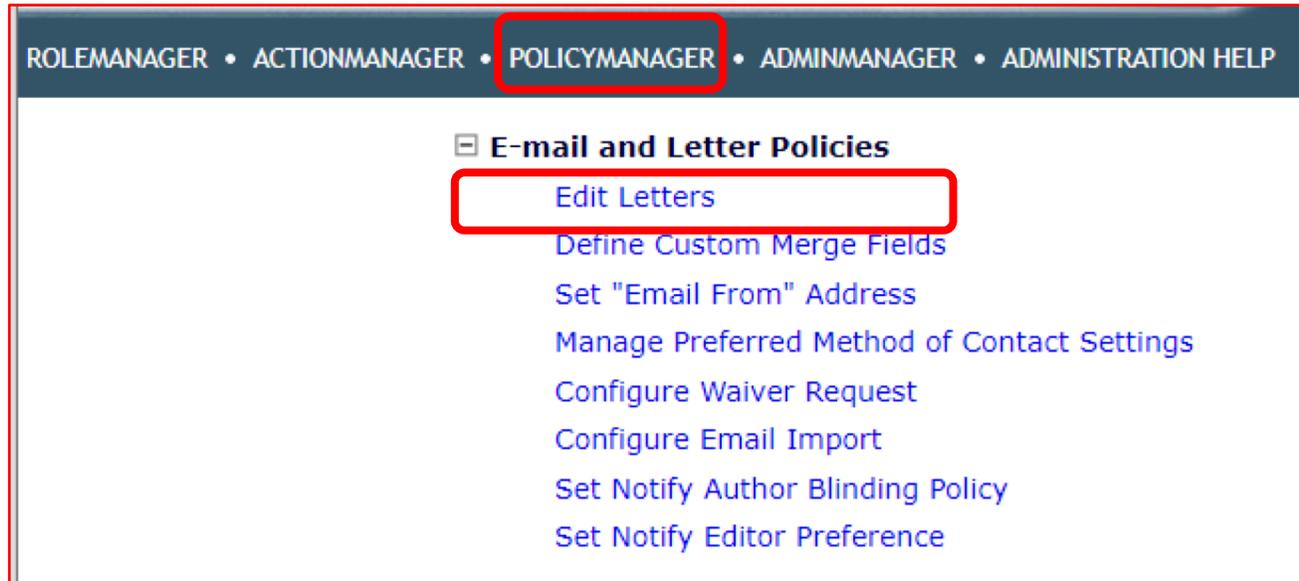
[Update Order](#)

[Cancel](#) [Add New Term](#)



Notifying the Author of Editor Decision in "Reject and Transfer" Decision Family allows Authors to select a transfer target site.

PolicyManager



ROLEMANAGER • ACTIONMANAGER • **POLICYMANAGER** • ADMINMANAGER • ADMINISTRATION HELP

- [-] **E-mail and Letter Policies**
 - Edit Letters**
 - Define Custom Merge Fields
 - Set "Email From" Address
 - Manage Preferred Method of Contact Settings
 - Configure Waiver Request
 - Configure Email Import
 - Set Notify Author Blinding Policy
 - Set Notify Editor Preference

PolicyManager – Edit Letters – Merge Codes

- **Editor Decision – Reject and Transfer**

- %TRANSFER_TARGETS%
- %TRANSFER_OFFER_EXPIRATION_DATE%
- %AGREE_TO_TRANSFER%
- %DECLINE_TO_TRANSFER%

- **Transfer Letter**

- %DECISION_LETTER%



- **Editor Notices**

- %ACTUAL_TRANSFER_PUBLICATION_TITLE%

- **Author Notice Submission Transferred**

- %ACTUAL_TRANSFER_PUBLICATION_TITLE%

- **Automated Transfer Reminder Report**

- %AUTHOR_TRANSFER_REMIND_DATE%

PolicyManager

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Role: Man

General Policies

- Set Manuscript Number Type
- Set Manuscript Number Revision Suffix
- Set Date Format
- Set Time Zone Display Policy
- Configure Unavailability Check and Instructions
- Configure Identity Confidence Check
- Set ISO Country Standard
- Configure General Due Date Preferences
- Set Reviewer Preferences
- Configure Electronic Calendar Due Date Preferences
- Set Editor Deep Link Expiration
- Set Enterprise Analytics Reporting Deep Link
- Set View Reviewer Comments for Author Deep Link Expiration
- Define Details Page Layouts
- Set Update Information Deep Link Expiration
- Create Customized Submission Flags
- Create Customized People Flags
-  Create Customized Schedule Group Flags
- Edit Production Notes Instructions
- Edit Alternate Contact Notes Instructions
- Customize Author Main Menu Instructions
- Customize Reviewer Selection Summary Instructions
- Configure Personal Classification Rankings
- Enable Institution Name Normalization
- Define Custom Metadata IDs
- Configure Warning Thresholds
- Set 'View Submission' Options

- Configure Personal Classification Rankings
- Enable Institution Name Normalization
- Define Custom Metadata IDs
- Configure Warning Thresholds
- Set 'View Submission' Options

PolicyManager – Select Custom Metadata ID – Article Type

Edit Article Type

Article Type:

Maximum Article Type name is 75 characters.

Warning: changing the Article Type name will apply the name change to all submissions of this type, including manuscripts/submissions.

Family: Regular **Editor Use Only:**

Hide When you **Hide** an Article Type, the Article Type will be deactivated (not available for new manuscripts).

Custom Metadata ID: 

[Select Custom Metadata ID](#)



PolicyManager – Select Custom Metadata ID – 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.

Cancel

Save and Close

Save and Add Another Question

[Insert Special Characters](#)

Initial Question

Question text:

Do you have color figures?

Integration Options ?

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote
- Include in Publication Charges Metadata *(Please enter a Custom Metadata ID below)*

Custom Metadata ID: ?

Have_Color_Figures

[Select Custom Metadata ID](#)

Policy Manager – Task Configuration

☰ **ProduXion Manager**

- Configure Artwork Quality Checking
- Configure Automatic Copy of Target to Actual Publication Information
- Configure Book Processing
- Configure NIHMS Embargo Period Rules
- Configure Submission Workflows and Production Tasks**
- Configure Schedule Group Production Tasks
- Configure Task Manager Policies
- Set Production Task Deep Link Expirations
- Configure Identifiers Displayed in Production Tracking
- Configure Production Statuses
- Define National Holidays
- Configure Automatic DOI Assignment
- Configure Reference Checking

PolicyManager – Add/Edit Task (for task export to Preprint server)

FTP Options

Submission Production Task Transmittal Method: 

Allow task assignment and FTP without Assignment Files

Include Aries Import XML file in transmittal

Include Author COI data file in transmittal

FTP task without go.xml file

Use Manuscript Number for package file names

Rename transmitted files by File Reference

Secure FTP Server address
(e.g. sftp://ftp.ariessys.com[:21]):

Username

Password

Subdirectory:

Email Address (for transmittal notification):

Submission Production Task Import Profile:

Email Address (for import notification):

XML file is required

Select Fields for Import

RoleManager – Editor Roles

Edit Role Definition

Role Name:*

Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple (Mac) clicking.

[Expand All](#) [Collapse All](#)

New Submissions

- Receive New Submissions in 'New Submissions Requiring Assignment' Folder
 - Perform Technical Check (submission received in 'New Submissions' Folder)
- Receive New Transferred Submissions in 'Transferred Submissions' Folder
- Submit Manuscript as an Editor
 - Restrict to 'Editor/Publisher Use Only' Article Types
 - Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Article Types

Editor Decisions

- Make a Decision

- Send Any Notification Letter OR
- "Draft and Send" permission for Reject and Transfer Decision Terms

- Notify Author after making a Decision
 - Draft Notification Letter for any decision
 - Send Any Notification Letter
 - Only Notify after selected decisions:

Decision Term	Decision Only	Draft	Draft and Send
Accept	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Revise	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reject	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Revise, No Review	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reject and Transfer	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reject and Transfer to Journal A	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reject and Offer Transfer to 3 Journals	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

- Receive New Transferred Submissions in "Transferred Submissions Folder"

ActionManager – Author Letters

Editor Decision and Final Disposition	
Event	Author Letters
Editor Decision	NONE
Rescind Decision	Author Notice Decision Rescinded
Publication Charges Payment Requested	APC - Payment Due
Publication Charges Payment Complete	APC Complete - Author
Final Disposition - Accept on Submission	Editor Decision - Accept
Final Disposition - Accept	NONE
Final Disposition - Reject	NONE
Final Disposition - Withdrawn	NONE
Author Agrees to Transfer Submission	NONE
Author Declines to Transfer Submission	NONE
Final Disposition - Transfer	Author Notice Submission Transferred

- The Decision Letter is associated with the Decision Term
- But publications may also configure **Author** letters for other Transfer events, e.g. "Final Disposition - Transfer"

ActionManager – Editor Letters

Editor Decision and Final Disposition	
Event	Managing Editor Letters
Editor Decision	Journal Office Notice Editor Decision Notification
Rescind Decision	NONE
Publication Charges Payment Requested	Journal Office Notice APC Requested
Publication Charges Payment Complete	Journal Office Notice APC is Complete
Final Disposition - Accept on Submission	NONE
Final Disposition - Accept	Editor Notice Submission Transferred
Final Disposition - Reject	NONE
Final Disposition - Withdrawn	NONE
Author Agrees to Transfer Submission	Editor Notice - Author Agrees to Transfer
Author Declines to Transfer Submission	Editor Notice - Author Declines to Transfer
Final Disposition - Transfer	Editor Notice Submission Transferred

- Publications may configure **Editor** Letters for Transfer events, e.g. "Author Agrees to Transfer Submission"

Don't forget the helpful Videos! (www.ariessys.com)

The screenshot shows the top navigation bar of the Ariessys website. The Ariessys logo is on the left. The navigation menu includes: HOME, JOURNALS LIST, SOLUTIONS (with a dropdown arrow), VIDEOS (highlighted with a purple box and a purple arrow pointing to it), EVENTS, VIEWS & PRESS (with a dropdown arrow), and ABOUT (with a dropdown arrow). On the right side of the navigation bar, there are links for Request a Demo, Contact Us, and Careers. Below the navigation bar, the page title is "Video Library". The introductory text reads: "Browse videos on Editorial Manager and ProduXion Manager below. For a full list of videos alphabetically, [click here](#). Can't find what you're looking for? [Contact us here](#) to suggest a topic!"

NEWEST RELEASES

The latest video releases on Editorial Manager and ProduXion Manager functionality.

A grid of four video thumbnails. Each thumbnail has a title, a duration, and a small icon representing the software (em for Editorial Manager, pm for ProduXion Manager, or tm for Task Manager).

- Personal Correspondence History**: 2:43. Icons: em, pm.
- Drag and Drop Reorder - Submission Items**: 1:06. Icon: em.
- Task Manager Overview**: 5:34. Icon: tm.
- Identity Confidence Checking in EM**: 2:17. Icon: em.

« prev 1 2 3 4 next »

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