Welcome to EEMUG 2019

#EEMUG2019

Editorial Manager

ProduXion Manager

Aries systems
Transparent and Open Peer Review

Hazel Winter, UK Account Coordinator, hwinter@ariessys.com
Agenda

- Transparent and Open Peer Review
- Author and Reviewer Experience
- Transfer of Review Forms between Journals
- Reviewer Discussion Forums
- Questions?
What on earth is Transparent Peer Review?
Transparent or Open?

- Transparency in peer review has been receiving increased focus over the past few years.
- In addition to being the theme of Peer Review Week 2018, several publishers signed an open letter pledging to facilitate transparent peer review through their publications (http://asapbio.org/letter).
- The phrases ‘Transparent’ and ‘Open’ peer review tend to be used interchangeably; however, it is important to mention the key differences.
Open or Transparent?

- **Open Peer Review**: discloses the identity of reviewers to authors, as well as authors to reviewers as part of the peer review process.

- **Transparent Peer Review**: the publication of review content alongside submitted articles.

  Transparent Peer Review can be open – however, the publication of reviewer identities is not required for transparent peer review.

- Editorial Manager supports Open Peer Review throughout the peer review process. We are evaluating ways to support transparent peer review.
Blinded or Open Peer Review: what’s the difference?

**Blinded Peer Review:**
- Authors never see Reviewer names.
- Authors may be permitted to see blinded attachments from reviewers.
- Authors see “edited highlights” of the review form that are merged into a letter, never the whole thing.
- Reviewers do not see the comments their fellow reviewers have made until the final decision is made.

**Open Peer Review:**
- Authors see Reviewer names.
- Authors can see unblinded attachments.
- Authors can see an unblinded individual review form outside of their decision letter (based on configuration).
- Reviewers can see other reviewers’ comments before the final decision is made.
How can Open Peer Review be handled in EM?

• Editorial Manager can be configured to:

  o allow Authors to see Reviewer names and reviews.

  o allow Reviewers to see other Reviewer identities and comments earlier in the process.

  o transfer both reviews and Reviewer information to other publications when papers are transferred.
Open Peer Review for Authors
Options for Author Access to Unblinded Reviews 1/2

You can choose the point at which you grant an Author access to their reviews. The options are -

After **First Decision** in these folders:

- [Submissions Needing Revision](#)
- [Revisions Sent Back to Author](#)
- [Incomplete Submissions Being Revised](#)
- [Revisions Waiting For Author’s Approval](#)
- [Revisions Being Processed](#)

Alternatively…
Options for Author Access to Unblinded Reviews 2/2

...you could allow the Author access only at the Final Decision stage, where they could view the reviews in the Submissions With A Decision folder.
### What the Author Sees: View Reviewer Comments

#### Submissions with an Editorial Office Decision for Author Amy Winehouse

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Title</th>
<th>Initial Date Submitted</th>
<th>Status Date</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Submission</td>
<td>DEMOHWBeta-D-18-00011</td>
<td>English Dialects: A Consideration</td>
<td>Nov 02, 2018</td>
<td>Nov 02, 2018</td>
<td>Accept</td>
</tr>
</tbody>
</table>

- View Submission
- View Reviewer Comments
- Author Response
- View Decision Letter
- Send E-mail

**Action:** View Reviewer Comments
Once the Author clicks the action link from the grid to view the comments, they can see the Reviewers’ names.

### View Reviewer Comments for Manuscript
**DEMOHWBeta-D-18-00011R1**  
"English Dialects: A Consideration"

Click the Reviewer recommendation term to view the Reviewer comments.

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Revision 1</th>
<th>Original Submission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Richard Reviewer (Reviewer 1)</td>
<td>(None)</td>
<td>Minor Revision</td>
</tr>
<tr>
<td>Amy Analyst (Reviewer 2)</td>
<td>(None)</td>
<td>Major Revision</td>
</tr>
<tr>
<td>Robert Reviewer (Reviewer 3)</td>
<td>(None)</td>
<td>Minor Revision</td>
</tr>
<tr>
<td>Author Decision Letter</td>
<td>Accept</td>
<td>Minor Revision</td>
</tr>
</tbody>
</table>
View Reviewer Comments for Manuscript
DEMOHWBeta-D-18-00011R1
"English Dialects: A Consideration"

Robert Reviewer (Reviewer 3)

Reviewer Recommendation Term:
Overall Reviewer Manuscript Rating:

<table>
<thead>
<tr>
<th>Custom Review Question(s)</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you willing to review the revision of this manuscript?</td>
<td>Yes:</td>
</tr>
<tr>
<td>Can the author and other reviewers see my comments on this manuscript?</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Manuscript Rating Question(s):</th>
<th>Scale</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>The subject addressed in this article is worthy of investigation.</td>
<td>[1-3]</td>
<td>2</td>
</tr>
<tr>
<td>The information presented was new.</td>
<td>[1-5]</td>
<td>4</td>
</tr>
<tr>
<td>The conclusions were supported by the data.</td>
<td>[1-10]</td>
<td>8</td>
</tr>
</tbody>
</table>

Comments to Author:
My comments to the author note that this manuscript needs minor revision.
What the Author Sees: Unblinded Attachments

Click 'File Inventory' to download the source files for the manuscript. Click 'Revise Submission' to submit a revision of the manuscript. If you Decline To Revise the manuscript, it will be moved to the Declined Revisions folder.

IMPORTANT: If your revised files are not ready to be submitted, do not click the 'Revise Submission' link.

Attachments for Manuscript Number DEMOHW150-D-18-00005 R1
"I am the greatest"

<table>
<thead>
<tr>
<th>Action</th>
<th>Uploaded By</th>
<th>Description</th>
<th>File Name</th>
<th>File Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download</td>
<td>Charles Critic (Reviewer 2)</td>
<td>Unblinded attachment 2.docx</td>
<td>11.6 KB</td>
<td></td>
</tr>
<tr>
<td>Download</td>
<td>Richard Reviewer (Reviewer 1)</td>
<td>Unblinded attachment 1.docx</td>
<td>11.6 KB</td>
<td></td>
</tr>
</tbody>
</table>
Configuring Open Peer Review for Authors
Start with your **Author role** first!

**RoleManager > Author role > Allow Access to Reviewer Names and Reviews** – choosing one of the sub-permissions **After Final Decision** or **After First Decision**.
You can either display or hide all elements of the review form to Authors.

**PolicyManager > Overall Manuscript Rating Question Settings > Display Reviewer Manuscript Rating to Author**
Configuration: Author Role 3/4

PolicyManager > Reviewer Recommendation Policies > Match Review Forms to Article Types and Reviewer Roles
**PolicyManager > Reviewer Recommendation Policies > Create/Edit Review Forms**

### Create Review Forms

- Default Review Form: **Edit**
- Add New Review Form
- Create/Edit Custom Review Questions

### Custom Review Questions

<table>
<thead>
<tr>
<th>Order</th>
<th>Question</th>
<th>Required for Submission</th>
<th>Visible to Other Reviewers</th>
<th>Visible to Author</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Are you willing to review the revision of this manuscript?</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>Remove</td>
</tr>
<tr>
<td>2</td>
<td>Can the author and other reviewers see my comments on this manuscript?</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>Remove</td>
</tr>
</tbody>
</table>
Open Peer Review for Reviewers
Options for Reviewers in Open Peer Review

• In traditional peer review, the Reviewer RoleManager permission “View Unblinded Comments” is used. This gives access to unblinded reviews after the Author Notification letter is sent.

• Open Peer Review uses the RoleManager permission “View Unblinded Reviews for Open Peer Review”.
Options for Reviewers in Open Peer Review

At the invitation stage, Reviewers have more material they can access. They can see:

• Unblinded completed reviews for any prior revisions, and
• Unblinded completed reviews for the current revision
• Decision letters for all revisions of the manuscript
• Unblinded Attachments for all revisions – if these are configured to be available to other reviewers.
Options for Reviewers in Open Peer Review

The Reviewer can access unblinded Reviews in the following places:

• New Invitations folder
• Pending Assignments folder
• Completed Assignments folder
• Submit Recommendation and Comments page
• View Reviewer Comments page
• View Individual Reviewer Comments page
• View Attachments Page
What the Reviewer Sees: Unblinded Reviews at Invitation

This reviewer can see other Reviewer Comments before they have even agreed to review this submission. Additionally…
What the Reviewer Sees: Attachments and Decision Letters

...you can permit the Reviewer to see unblinded attachments and decision letters, giving further insight.
What the Reviewer Sees: Unblinded Reviews 1

This reviewer can see other Reviewer Comments, in the same way that the Author can.

<table>
<thead>
<tr>
<th>Reviewer Comments for Manuscript</th>
<th>Revision 1</th>
<th>Original Submission</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Reviewer Comments for Manuscript DEMOHW150-D-18-00006R1 &quot;Coffee Nut&quot;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Click the Reviewer recommendation term to view the Reviewer comments.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Olivia Opinion (Reviewer 1)</td>
<td>Accept</td>
<td>(None)</td>
</tr>
<tr>
<td>Remy Referee (Reviewer 2)</td>
<td>Accept</td>
<td>(None)</td>
</tr>
<tr>
<td>Arnold Appraiser (Reviewer 3)</td>
<td>Accept</td>
<td>(None)</td>
</tr>
<tr>
<td>Author Decision Letter</td>
<td>Accept</td>
<td>Revise</td>
</tr>
</tbody>
</table>
**What the Reviewer Sees: Unblinded Reviews 2**

<table>
<thead>
<tr>
<th>DEMOHW150-D-18-00006R1</th>
<th>Coffee Nut</th>
<th>Revision 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arnold Appraiser (Reviewer 3)</td>
<td>Accept</td>
<td>75</td>
</tr>
</tbody>
</table>

**Reviewer Recommendation Term:**

<table>
<thead>
<tr>
<th>Overall Reviewer Manuscript Rating:</th>
</tr>
</thead>
<tbody>
<tr>
<td>75</td>
</tr>
</tbody>
</table>

**Comments to Editor:**

What an absolutely fascinating read this was. I have attached a file with some see suggestions for light changes.

**Comments to Author:**

This was a refreshing read!
What the Reviewer Sees: Unblinded Attachments

The reviewer can see unblinded attachments from all revisions.
Configuring Open Peer Review for Reviewers
Configuration: Reviewer Role

Edit Role Definition

Role Name:*
Reviewer

Check the functions that this role is permitted to perform.

- Permissions for New Reviewer Invitations
- Permissions for Pending Assignments and Completed Assignments
- Permissions for Completed Assignments Only
- General Permissions (Applicable to All Reviewer Pages)

General Permissions (Applicable to All Reviewer Pages)

- View Manuscript Number
- View Article Type
- View Article Title
- View Status Date
- View Current Status
- View Assigning Editor
- View Author Decision Letter
- View Unblinded Version
- View Blinded Version
- View Un-Blinded Reviews for Open Peer Review
- View Other Reviewer’s Comments to Author
- View Other Reviewer’s Comments to Editor
- View Author’s Response to Reviewer Comments
- View Reviewer’s Own Review History
- Send Ad Hoc E-mail
Merge Fields for Open Peer Review

%OPEN_INDIVIDUAL_REVIEWER_COMMENTS_TO_AUTHOR%
%OPEN_LINKED_REVIEWER_COMMENTS_TO_AUTHOR%
%OPEN_LINKED_REVIEWER_COMMENTS_TO_EDITOR%
%OPEN_LINKED_REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%
%OPEN_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%
%OPEN_REVIEWER_COMMENTS_TO_AUTHOR%
%OPEN_REVIEWER_COMMENTS_TO_EDITOR%
%OPEN_REVIEWER_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%
%OPEN_REVIEW_QUESTIONS_AND_RESPONSES%
%OPEN_ALL_RESPONSES_AND_INDIVIDUAL_COMMENTS_TO_AUTHOR%
Transferring Reviews
Transferring Reviews

• Review information can be transferred from an EM journal to a non-EM journal.

• Review information can be transferred from an EM journal to another EM journal.

• Reviewers are asked at the time of review if their information may be transferred.
Transferring Reviews: Authorisation Questions

Authorisation questions drive what appears upon the transfer of the paper:

1. If this submission is transferred to another publication, do we have your consent to include your identifying information?
2. If this submission is transferred to another publication, do we have your consent to include your review?

If yes to both of the above, a third question appears:

3. If this submission is transferred to another publication with "Open Peer Review", do we have your consent to publish your review in a pre-publication history?
Transferring Reviews

One More Time: an appreciation of Daft Punk

Original Submission
Reggie Reviewer (Reviewer 1)

Recommendation: Minor Revision
Overall Manuscript Rating (1-100):

Transfer Authorization

[Instructions]
* If this submission is transferred to another publication, do we have your consent to include your identifying information?
  - [ ] Please Select Response
  - [ ] Yes
  - [ ] No
* If this submission is transferred to another publication, do we have your consent to include your review?
  - [ ] Please Select Response
  - [ ] Yes
  - [ ] No
* If this submission is transferred to another publication with "Open Peer Review", do we have your consent to publish your review in a pre-publication history?
  - [ ] Please Select Response
  - [ ] Yes
  - [ ] No
Transferring Reviews

- For EM-to-EM transfer, the submission lands in the “Transferred Submissions” folder on the receiving site.
- [View Transferred Information] action link appears.
Transferring Reviews

Transferred Information for "This is my transferred reviews test"

Transferred from UK AC TEST Site 1

Andy Author (Corresponding Author)
View Transferred Submission
View Transferred Decision Letter

Reviewer 1

Reggie Reviewer

AUGERIA
Trash4@edmgr.com

Recommendations: Minor Revision

Overall Reviewer Manuscript Rating:

Date Reviewer Invited: Dec 17, 2018
Date Review Completed: Dec 17, 2018

Transfer Authorization Questions

If this submission is transferred to another publication, do we have your consent to include your identifying information? Yes
If this submission is transferred to another publication, do we have your consent to include your review? Yes
If this submission is transferred to another publication with "Open Peer Review", do we have your consent to publish your review in a pre-publication history? Yes

Custom Review Question(s)
Are you willing to review the revision of this manuscript? Yes

Reviewer Blind Comments to Author:
Nicely done

Reviewer Confidential Comments to Editor:
Transferring Reviews: reviewer 1

<table>
<thead>
<tr>
<th>Reviewer 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reggie Reviewer</td>
</tr>
<tr>
<td>ALGERIA</td>
</tr>
<tr>
<td><a href="mailto:Trash4@edmgr.com">Trash4@edmgr.com</a></td>
</tr>
</tbody>
</table>

**Recommendation:** Minor Revision  
**Overall Reviewer Manuscript Rating:**  
**Date Reviewer Invited:** Dec 17, 2018  
**Date Review Completed:** Dec 17, 2018

### Transfer Authorization Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>If this submission is transferred to another publication, do we have your consent to include your identifying information?</td>
<td>Yes</td>
</tr>
<tr>
<td>If this submission is transferred to another publication, do we have your consent to include your review?</td>
<td>Yes</td>
</tr>
<tr>
<td>If this submission is transferred to another publication with &quot;Open Peer Review&quot;, do we have your consent to publish your review in a pre-publication history?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Custom Review Question(s)

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you willing to review the revision of this manuscript?</td>
<td>1</td>
</tr>
</tbody>
</table>

### Reviewer Blind Comments to Author:

Nicely done

### Reviewer Confidential Comments to Editor:

I like it
Transferring Reviews: Reviewer 2

Mickey Mouse

XX
mouse@trash.com

Recommendation: Minor Revision
Overall Reviewer Manuscript Rating:
Date Reviewer Invited: Dec 17, 2018
Date Review Completed: Dec 17, 2018

Transfer Authorization Questions
If this submission is transferred to another publication, do we have your consent to include your identifying information? Yes
If this submission is transferred to another publication, do we have your consent to include your review? Yes
If this submission is transferred to another publication with “Open Peer Review”, do we have your consent to publish your review in a pre-publication history? No

Custom Review Question(s)
Are you willing to review the revision of this manuscript? 1

Reviewer Blind Comments to Author:
It needs a re-write.

Reviewer Confidential Comments to Editor:
Work to do.
## Transferring Reviews: Reviewer 3

(This Reviewer declined to transfer identifying information.)

<table>
<thead>
<tr>
<th>Recommendation:</th>
<th>Major Revision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Reviewer Manuscript Rating:</td>
<td></td>
</tr>
<tr>
<td>Date Reviewer Invited:</td>
<td>Dec 17, 2018</td>
</tr>
<tr>
<td>Date Review Completed:</td>
<td>Dec 17, 2018</td>
</tr>
</tbody>
</table>

### Transfer Authorization Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>If this submission is transferred to another publication, do we have your consent to include your identifying information?</td>
<td>No</td>
</tr>
<tr>
<td>If this submission is transferred to another publication, do we have your consent to include your review?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Custom Review Question(s)

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you willing to review the revision of this manuscript?</td>
<td>1</td>
</tr>
</tbody>
</table>

### Reviewer Blind Comments to Author:

I am pretty appalled at this

### Reviewer Confidential Comments to Editor:

Maybe transfer?
Transferring Reviews 1

View Transferred Information action link on receiving site displays on:

- Transferred Submissions folder
- View Reviews and Comments page
- Details (Custom Layouts)
- Editor’s Decision and Comments page
Transferring Reviews: NB

• Transferred Reviews are **read only** in the receiving journal - Reviewer records are not created for each transferred review / reviewer.

• Transferred Reviews are **not** directly available to Author or Reviewers on the receiving site, but…

• …they can be copied and pasted into letters.

• Also, a [%TRANSFERRED_REVIEWS% merge field can be included in the Transfer Letter deposited in the receiving journal.

• Lastly, review information from Journal A only goes from A to B, not on to C. Review information from B would go to C, but not to D, etc.
Discussion Forums for Open Peer Review
Discussion Forums

• Discussion Forum functionality allows Reviewers and Editors to participate in a discussion.

  • The discussion automatically initiates when an Editor is assigned to handle a submission.
  • The Editor and Special Relationship Editor are added to the discussion automatically.
  • Reviewers are added to the discussion when they agree to review.
  • Reviewers can only participate in a discussion after they submit a review.
Discussion Forums for Editors
### Discussion for Manuscript Number: DEMOHWBeta-D-18-00013R1

**Hedy Lamarr**

"Being a matinee idol: it's not as glamorous as it seems"

<table>
<thead>
<tr>
<th>Participant</th>
<th>Comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olivia Opinion (Reviewer 2)</td>
<td>Publish or be damned!</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>Remy Referee (Reviewer 1)</td>
<td>I'm late to the party, but I don't have any strong feelings either way</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>Ricki Lake</td>
<td>Please join the discussion about this manuscript, which the reviewers are (more...)</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>Arnold Appraiser (Reviewer 1)</td>
<td>I disagree with you, Olivia. I found the analysis lacking and the (more...)</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>Olivia Opinion (Reviewer 1)</td>
<td>Greetings, fellow reviewers. I think this manuscript is well-written and (more...)</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>mary mary</td>
<td>Please review the manuscript and discuss here.</td>
<td>Dec 12, 2018</td>
</tr>
</tbody>
</table>
Discussion Forums: Open Peer Review

Reviewer participants are kept in a separate section for ease.
Discussion Forums: Open Peer Review

When a discussion is initiated, the initial Editor comments are visible on the right. As the discussion continues…
Discussion Forums: Open Peer Review

…the area on the right becomes populated with the comments made.

Discussion for Manuscript Number: DEMOHWbeta-D-18-00013
"Being a matinee idol: it’s not as glamorous as it seems"

Reviewer instructions go here

View Reviewer Comments

Comments:
I disagree with you, Olivia. I found the analysis lacking and the conclusions, well, inconclusive. The paper needs a significant rewrite.

<table>
<thead>
<tr>
<th>Participant</th>
<th>Comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olivia Opinion</td>
<td>Greetings, fellow reviewers, I think this manuscript is well-written and needs only minor revision to make it publishable. (les...)</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>Mary Mary</td>
<td>Please review the manuscript and discuss here.</td>
<td>Dec 12, 2018</td>
</tr>
</tbody>
</table>
Discussion Forums: Notifications

Participants in the discussion can receive notifications of comments posted:

Re: Ms. No. DEMOHWBeta-D-18-00013
Being a matinee idol: it’s not as glamorous as it seems

Dear Dr mary,

A comment has been posted for the discussion you initiated.

The initial post was Please review the manuscript and discuss here.

The new comment is:
Greetings, fellow reviewers. I think this manuscript is well-written and needs only minor revision to make it publishable.

Thank you,

DEMO HW Beta Site
Discussion Forums: Add Participants

You can add participants from the Editor pool…

<table>
<thead>
<tr>
<th>Participant</th>
<th>Comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olivia Opinion (Reviewer 1)</td>
<td>Publish or be damned!</td>
<td>Dec 12, 2018</td>
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<td>Greetings, fellow reviewers. I think this manuscript is well-written and (more...)</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>mary mary</td>
<td>Please review the manuscript and discuss here.</td>
<td>Dec 12, 2018</td>
</tr>
</tbody>
</table>
Discussion Forums: Add Participants 2

**Topic**
Reviewer discussion: Matinee Idol

**Comments**
Please join the discussion about this manuscript, which the reviewers are already discussing.

---

**Manuscript Classifications**
(1) Bicycles; (2) Racing; (3) BMX

---

**Editor Candidates**
Page: 1 of 1 (8 total candidates)
Display 10 results per page.

<table>
<thead>
<tr>
<th>Select</th>
<th>Editor Role</th>
<th>Editor Name</th>
<th>Current Assignments</th>
<th>View Reviews and Comments</th>
<th>Download Files (source and companion)</th>
<th>View Draft Decision Letter</th>
<th>Classification Matches</th>
<th>Classification Matches</th>
<th>Available during next 30 days</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>Editor</td>
<td>Claire Commentator</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>✔</td>
<td>Editor</td>
<td>Frankie Hollywood</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
Discussion Forums: Add Participants 3

Comments:

<table>
<thead>
<tr>
<th>Participant</th>
<th>Comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ricki Lake</td>
<td>Please join the discussion about this manuscript, which the reviewers are (more...)</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>Arnold Appraiser</td>
<td>I disagree with you, Olivia. I found the analysis lacking and the (more...)</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>Olivia Opinion</td>
<td>Greetings, fellow reviewers. I think this manuscript is well-written and (more...)</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>mary mary</td>
<td>Please review the manuscript and discuss here.</td>
<td>Dec 12, 2018</td>
</tr>
</tbody>
</table>

Editor Participants

<table>
<thead>
<tr>
<th>Editor Participant</th>
<th>Role</th>
<th># Posts</th>
<th>Latest Post</th>
<th>Participant Status</th>
<th>View Reviews and Comments</th>
<th>Download Files</th>
<th>View Draft Decision Letter</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claire Commentator</td>
<td>Editor</td>
<td>0</td>
<td></td>
<td>Active</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>Send E-mail</td>
</tr>
<tr>
<td>Frankie Hollywood</td>
<td>Editor</td>
<td>0</td>
<td></td>
<td>Active</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>Send E-mail</td>
</tr>
<tr>
<td>Ricki Lake</td>
<td>Editor</td>
<td>1</td>
<td>Dec 12, 2018</td>
<td>Active</td>
<td></td>
<td>✓</td>
<td></td>
<td>Send E-mail</td>
</tr>
<tr>
<td>mary mary</td>
<td>Managing Editor</td>
<td>1</td>
<td>Dec 12, 2018</td>
<td>Active</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Send E-mail</td>
</tr>
</tbody>
</table>
Discussion Forums for Reviewers
Discussion Forums: Reviewer Interface 1

The Reviewer sees the **Discussion** action link *after* submitting a Review…

<table>
<thead>
<tr>
<th>Action</th>
<th>My Reviewer Number</th>
<th>Manuscript Number</th>
<th>Article Type</th>
<th>Article Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion</td>
<td></td>
<td>DEMOHWBeta-D-18-00013</td>
<td>Original Study</td>
<td>Being a matinee idol: it’s not as glamorous as it seems</td>
</tr>
</tbody>
</table>
Discussion Forums: Reviewer Interface 2

…they also see it on the Review Thank You landing page following completion of their Review.
## Discussion for Manuscript Number: DEMOHWBeta-D-18-00013R1
"Being a matinee idol: it’s not as glamorous as it seems"

Reviewer instructions go here

[View Reviewer Comments]

### Topic: Reviewer discussion: Matinee idol

<table>
<thead>
<tr>
<th>Participant</th>
<th>Comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olivia Opinion</td>
<td>Publish or be damned!</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>(Reviewer 1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remy Referee</td>
<td>I'm late to the party, but I don't have any strong feelings either way</td>
<td>Dec 12, 2018</td>
</tr>
<tr>
<td>(Reviewer 2)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Post]
View Reviewer Comments for Manuscript
DEMOHWBeta-D-18-00013R1
"Being a matinee idol: it’s not as glamorous as it seems"

Click the Reviewer recommendation term to view the Reviewer comments.

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Revision 1</th>
<th>Original Submission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olivia Opinion (Reviewer 1)</td>
<td>Accept</td>
<td>Minor Revision</td>
</tr>
<tr>
<td>Arnold Appraiser (Reviewer 2)</td>
<td>Agreed to Review</td>
<td>Major Revision</td>
</tr>
<tr>
<td>Remy Referee (Reviewer 3)</td>
<td>Agreed to Review</td>
<td>Minor Revision</td>
</tr>
<tr>
<td>Author Decision Letter</td>
<td></td>
<td>Minor Revision</td>
</tr>
</tbody>
</table>
### Completed Reviewer Assignments for Olivia Opinion

Page: 1 of 1 (4 total assignments)

<table>
<thead>
<tr>
<th>Action</th>
<th>My Reviewer Number</th>
<th>Manuscript Number</th>
<th>Article Type</th>
<th>Article Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion</td>
<td>1</td>
<td>DEMOHWBeta-D-18-00013</td>
<td>Original Study</td>
<td>Being a matinee idol: It’s not as glamorous as it seems</td>
</tr>
<tr>
<td>View Reviewer Comments</td>
<td>1</td>
<td>DEMOHWBeta-D-18-00013</td>
<td>Original Study</td>
<td>Being a matinee idol: It’s not as glamorous as it seems</td>
</tr>
</tbody>
</table>

- Discussion
- View Reviewer Comments
- View Decision Letter
- View Attachments
- Send E-mail
Configuring Discussion Forums
Discussion Forums: Configuration

PolicyManager > Configure Discussion Topic Templates

PolicyManager Main Menu

- Registration and Login Policies
- Status Policies
- Submission Policies
- Questionnaire Policies
- Additional Data Policies
- Editor Assignment Policies
- Reviewer and Editor Form Policies
- E-mail and Letter Policies
- General Policies
- Discussion Forums
  - Configure Discussion Forum Settings
  - Configure Discussion Topic Templates
  - Configure Automatic Discussion Initiation
Discussion Forums: Configuration

Choose Reviewer Consultation as a template type; add a name and comments.

![Image of Add Discussion Topic Template]

- **Discussion Topic Template Type**: Reviewer Consultation
- **Discussion Topic Template Name**: Reviewer Consultation
- **Discussion among Reviewers**: Discussion among Reviewers
- **Initial Comments**: Please review the manuscript and use this discussion forum to discuss among yourselves.
# Discussion Forums: Configuration

There are default options for Editors on this screen too.

<table>
<thead>
<tr>
<th>Default Editor Participant Permissions</th>
<th>Editor Access to ‘Details’ Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Reviews and Comments</td>
<td>□ Display 'Details' link in Submissions with Active Discussions folder and on Discussion page.</td>
</tr>
<tr>
<td>Download Files (source and companion)</td>
<td>Select the Details Page Layout that participants should see if they are not in the Editor chain and do not have RoleManager permission to 'View All Submissions' or 'Search All Manuscripts.'</td>
</tr>
<tr>
<td>View Draft Decision Letter</td>
<td>Editorial Details Layout Configured for the Editor's Role</td>
</tr>
</tbody>
</table>
Discussion Forums: Configuration

Select notifications for the participants to receive.

<table>
<thead>
<tr>
<th>Editor Discussion Letters</th>
<th>Select the Letter to send asking Editors to participate:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Discussion Forum Invitation</td>
</tr>
</tbody>
</table>

Select the notification letter to send to Editors when comments are posted:
- Discussion Forum Notification

- Notify discussion initiator only
- Notify all active Editor participants

<table>
<thead>
<tr>
<th>Reviewer Discussion Letters</th>
<th>Select the Letter to send asking Reviewers to participate:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Discussion Forum Invitation</td>
</tr>
</tbody>
</table>

Select the notification letter to send to Reviewers when comments are posted:
- Discussion Forum Notification
Discussion Forums: Configuration

PolicyManager > Configure Automatic Discussion Initiation

PolicyManager Main Menu

- Registration and Login Policies
- Status Policies
- Submission Policies
- Questionnaire Policies
- Additional Data Policies
- Editor Assignment Policies
- Reviewer and Editor Form Policies
- E-mail and Letter Policies
- General Policies

Discussion Forums
- Configure Discussion Forum Settings
- Configure Discussion Topic Templates
- **Configure Automatic Discussion Initiation**
## Discussion Forums: Configuration

### Configure Automatic Discussion Initiation

In the grid below, for each Article Type, you may specify the types of discussions to be opened automatically for a submission based on a Discussion Trigger.

<table>
<thead>
<tr>
<th>Article Type</th>
<th>Discussion Trigger</th>
<th>Editor Agrees to Assignment</th>
<th>First Editor Confirmed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td></td>
<td>Initiate Editor Consultation Discussion Automatically</td>
<td>Initiate Reviewer Consultation Discussion Automatically</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editor Roles:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editor</td>
<td>Select All</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editorial Assistant</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editorial Board</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editor-in-Chief</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Please Choose a Topic Template</td>
<td></td>
</tr>
</tbody>
</table>
Discussion Forums: Configuration

PolicyManager > Configure Discussion Forum Settings

PolicyManager Main Menu

- Registration and Login Policies
- Status Policies
- Submission Policies
- Questionnaire Policies
- Additional Data Policies
- Editor Assignment Policies
- Reviewer and Editor Form Policies
- E-mail and Letter Policies
- General Policies
- Discussion Forums
  - **Configure Discussion Forum Settings**
  - Configure Discussion Topic Templates
  - Configure Automatic Discussion Initiation
Discussion Forums: Configuration

Configure Discussion Forum Settings

Custom Instructions

Enter any instructions that you would like to appear on the Editor version of the Discussion page.

Put your Editor instructions here

Enter any instructions that you would like to appear on the Reviewer version of the Discussion page.

Put your Reviewer instructions here

Deep Link Explications

Please specify how long the Discussion Deep Links (DISCUSSION DEEP_LINK% and REVIEWER_DISCUSSION DEEP_LINK%) remain active. To keep the links active indefinitely, do not check any of the boxes. If all boxes are checked, each link expires when the first criterion is met.

- Expire link after 3 clicks
- Expire link after 5 days
- Expire when discussion is concluded
Discussion Forums: Configuration

RoleManager > Reviewer > General Permissions

- General Permissions (Applicable to All Reviewer Pages)
  - View Manuscript Number
  - View Article Type
  - View Article Title
  - View Status Date
  - View Current Status
  - View Assigning Editor
  - View Author Decision Letter
    - View Unblinded Version
    - View Blinded Version
  - View Un-Blinded Reviews for Open Peer Review
  - View Other Reviewer's Comments to Author
  - View Other Reviewer's Comments to Editor
  - View Author's Response to Reviewer Comments
  - View Reviewer's Own Review History
  - Send Ad Hoc E-mail
**Discussion Forums: Configuration**

**PolicyManager > Reviewer Recommendation**
**Policies > Create/Edit Review Forms**

**Edit Review Form**

<table>
<thead>
<tr>
<th>Review Form Name:</th>
<th>Default Review Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hide</strong> - When you Hide a Reviewer Form, the form will be deactivated (not available for use with any Article Types).</td>
<td></td>
</tr>
</tbody>
</table>

**Custom Review Questions**

<table>
<thead>
<tr>
<th>Order</th>
<th>Question</th>
<th>Required for Submission</th>
<th>Visible to Other Reviewers</th>
<th>Visible to Author</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Are you willing to review the revision of this manuscript?</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Remove</td>
</tr>
<tr>
<td>2</td>
<td>Can the author and other reviewers see my comments on this manuscript?</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Remove</td>
</tr>
</tbody>
</table>
Questions?

Hazel Winter: hwinter@ariessys.com