Welcome to EEMUG 2017

13th Annual European Editorial Manager® User Group Meeting

Aries systems

Prompts and Automation in Editor Workflows

Seb Atay
13th February 2017

13th Annual European Editorial Manager® User Group Meeting

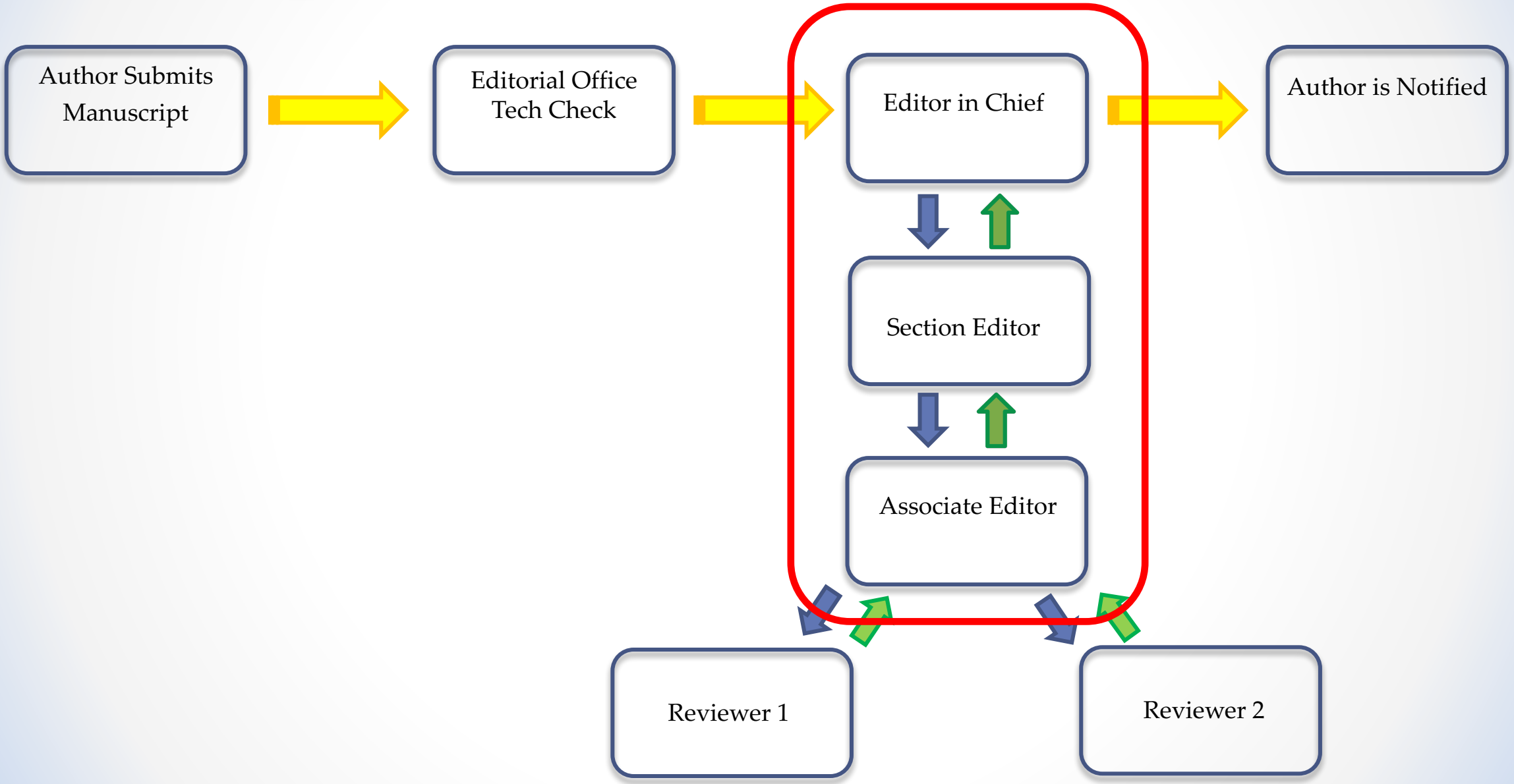
Aries systems

Introduction

Aim

- Classic assignment
- Assigning an editor chain
- Modifying an editor chain
- Automatic editor assignment
- Suggest editors
- Editor summary reminders

Sample Peer Review Workflow



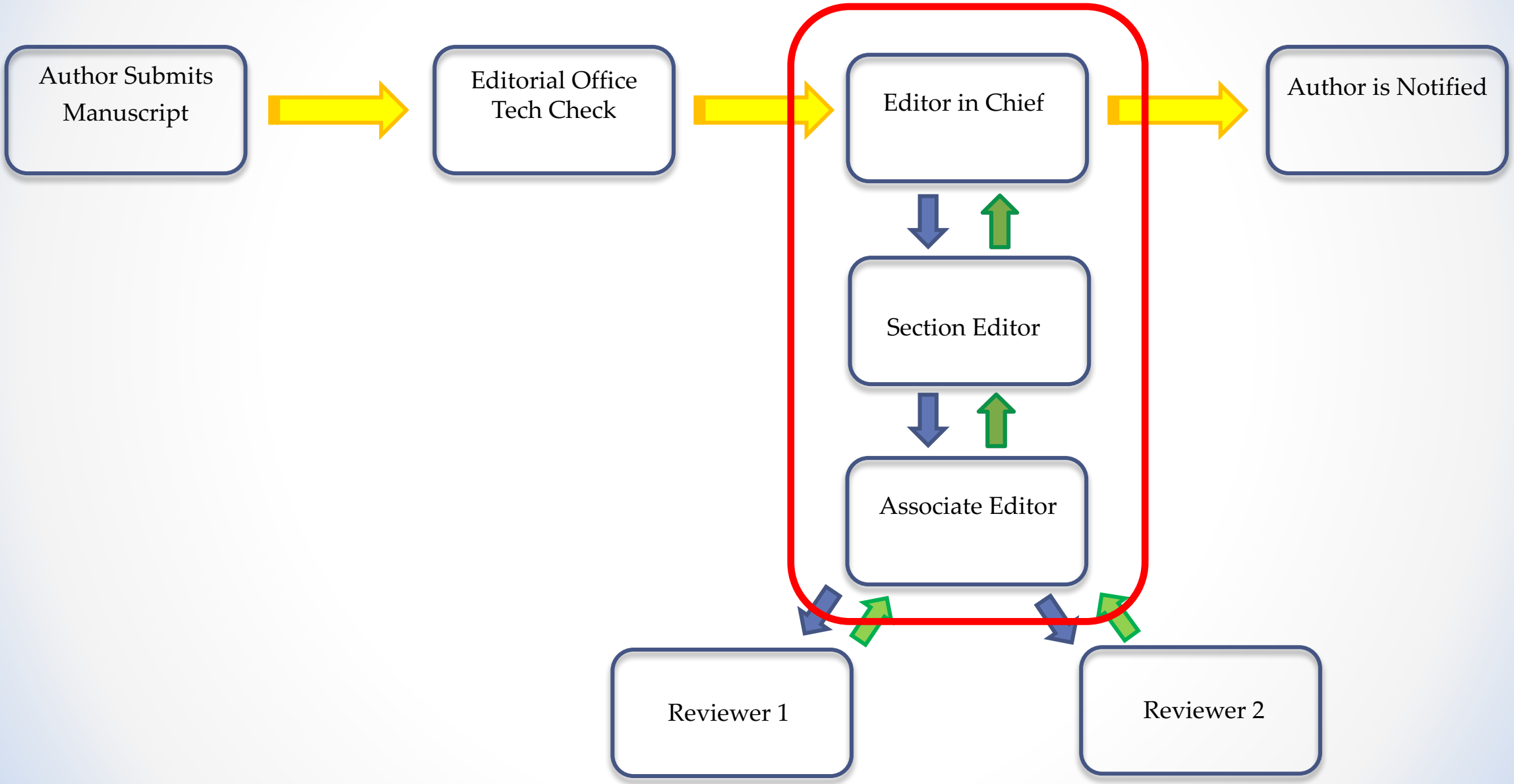
Editor Chains

- All submissions must be assigned to an editor to go through peer review.
- Editors can handle or delegate a submission based on permissions.
- Order of assignment determines the order decisions are returned.

Editor Terminology

- Attached Editor
- Handling Editor
- First Editor
- Assigned Editor
- Lower-Level Editor
- Upper-Level Editor
- Corresponding Editor

Sample Peer Review Workflow

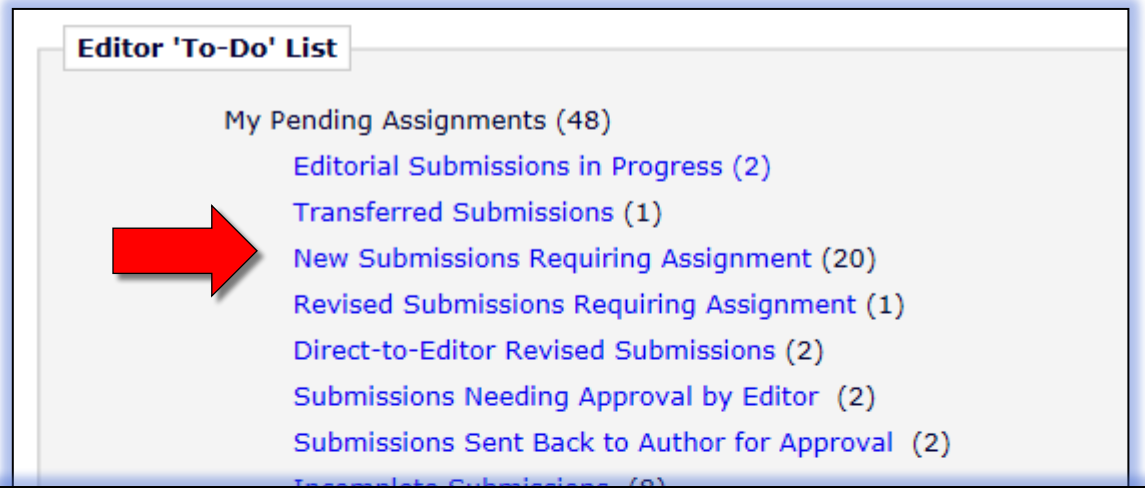


Editor Chains

- How are editors assigned?
  - Invited
  - Assigned directly
- Where does the submission go?

Classic Assignment

Classic Method



Quicklinks

New Submissions Requiring Assignment - Sally Editor, PhD

Contents: These are the new submissions that require an Editor Assignment. Use the up/down arrows to change the sort order.

Page: **1** of 2 (20 total submissions) 1 2

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Current Status	Status Date
View Submission Duplicate Submission Check (...) Details Initiate Discussion History File Inventory Edit Submission Send Back to Author Remove Submission Classifications Assign Editor Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions	SALLYDEV130-D-16-00068	Original Study	EMUG 2016 - Editor Assignment Options	Buzz Lightyear Aldrin PhD D !	May 5 2016 4:28PM	Submitted to Journal	May 5 2016 4:28PM

Classic Method

Assign Editor

Manuscript Number: SALLYDEV130-D-16-00068

Title: EMUG 2016 - Editor Assignment Options

Use the search tool to identify the most appropriate person to handle this submission.

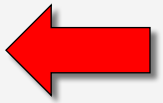
Click the Blind Editors link to block access to this submission for one or more Editors.
Blind Editors

Insert Special Character | Cancel | Value Options

(	Criterion	Is/Is not	Selector	Value	)
	Last Name	is	Begins With	Editor	

Add

Clear | Search



Classic Method

Assign Editor

Manuscript Number: SALLYDEV130-D-16-00068

Title: EMUG 2016 - Editor Assignment Options

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.

Click the Blind Editors link to block access to this submission for one or more Editors.
Blind Editors

Cancel | Send Custom Letters | Send Default Letters

Search Again

Page: 1 of 1 (7 total People Matches) Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
○	Associate Editor	Harry Editor	3	0		Yes
○	Editor in Chief	Chief Editor	9	0		Yes
○	Managing Editor	Ed J Editor, MD	2	0		Yes
◉	Managing Editor	Sally Editor, PhD	30	0		Yes
○	Section Editor	David Editor	14	0		Yes
○	Section Editor	John Editor	7	0		Yes
○	Section Editor	Michael Editor	21	0		Yes

Page: 1 of 1 (7 total People Matches) Display 10 results per page.

Search Again

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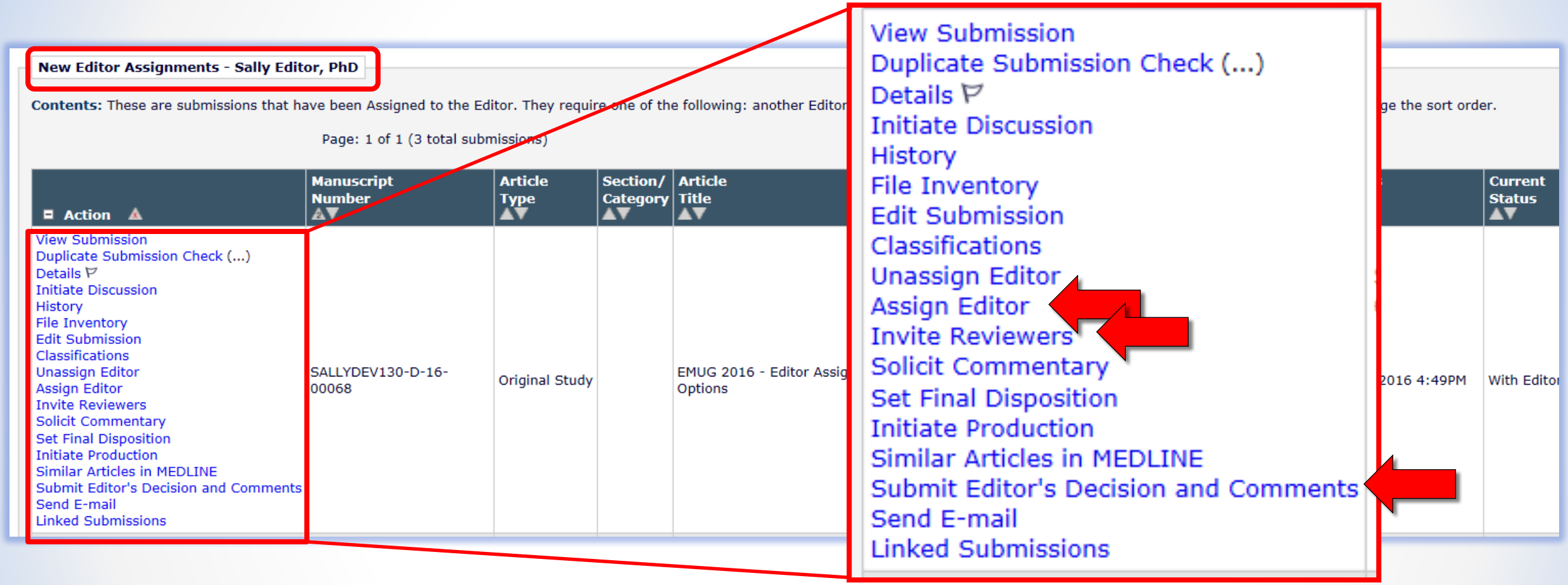
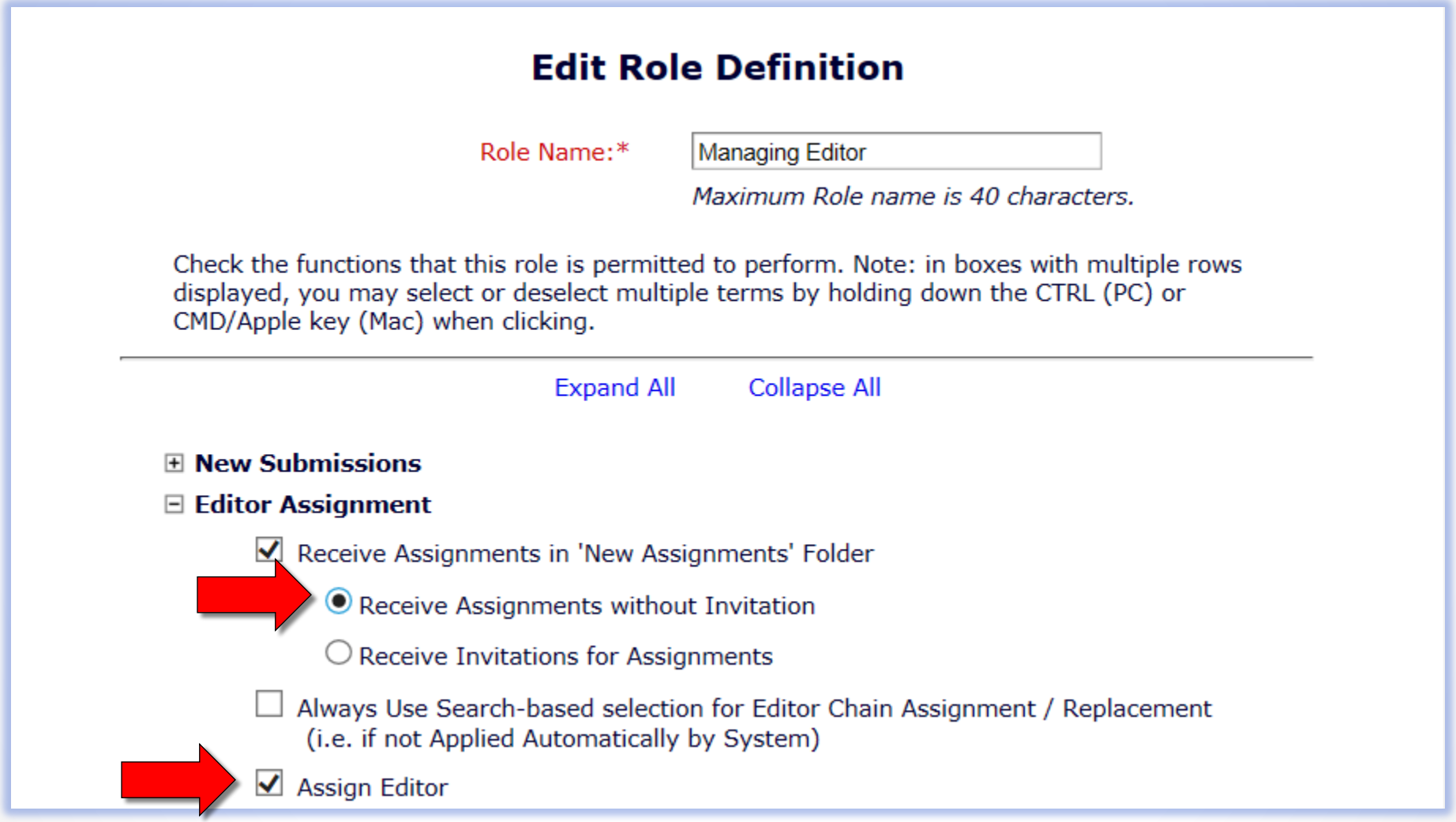
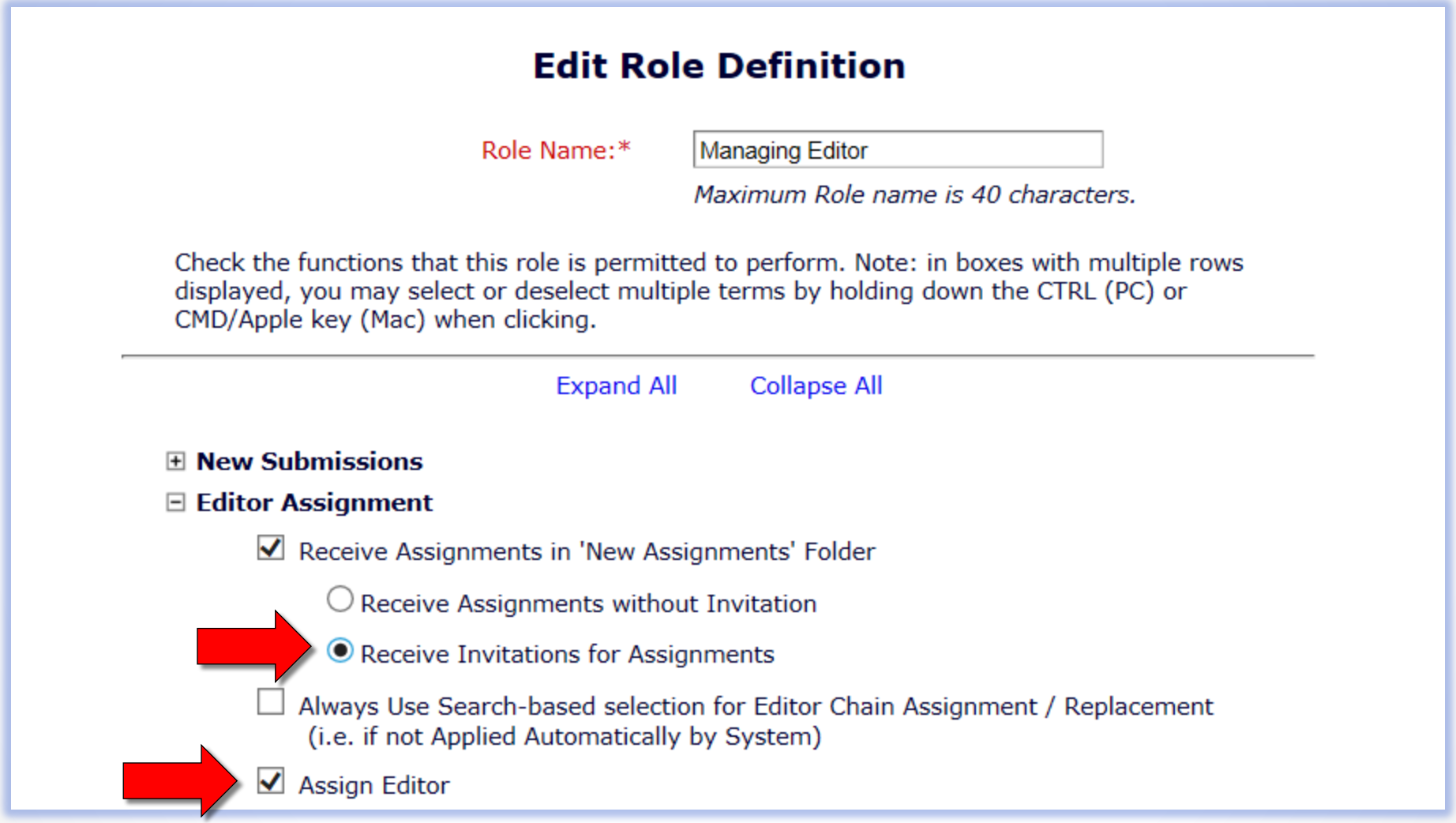
Classic Method



RoleManager - Editor

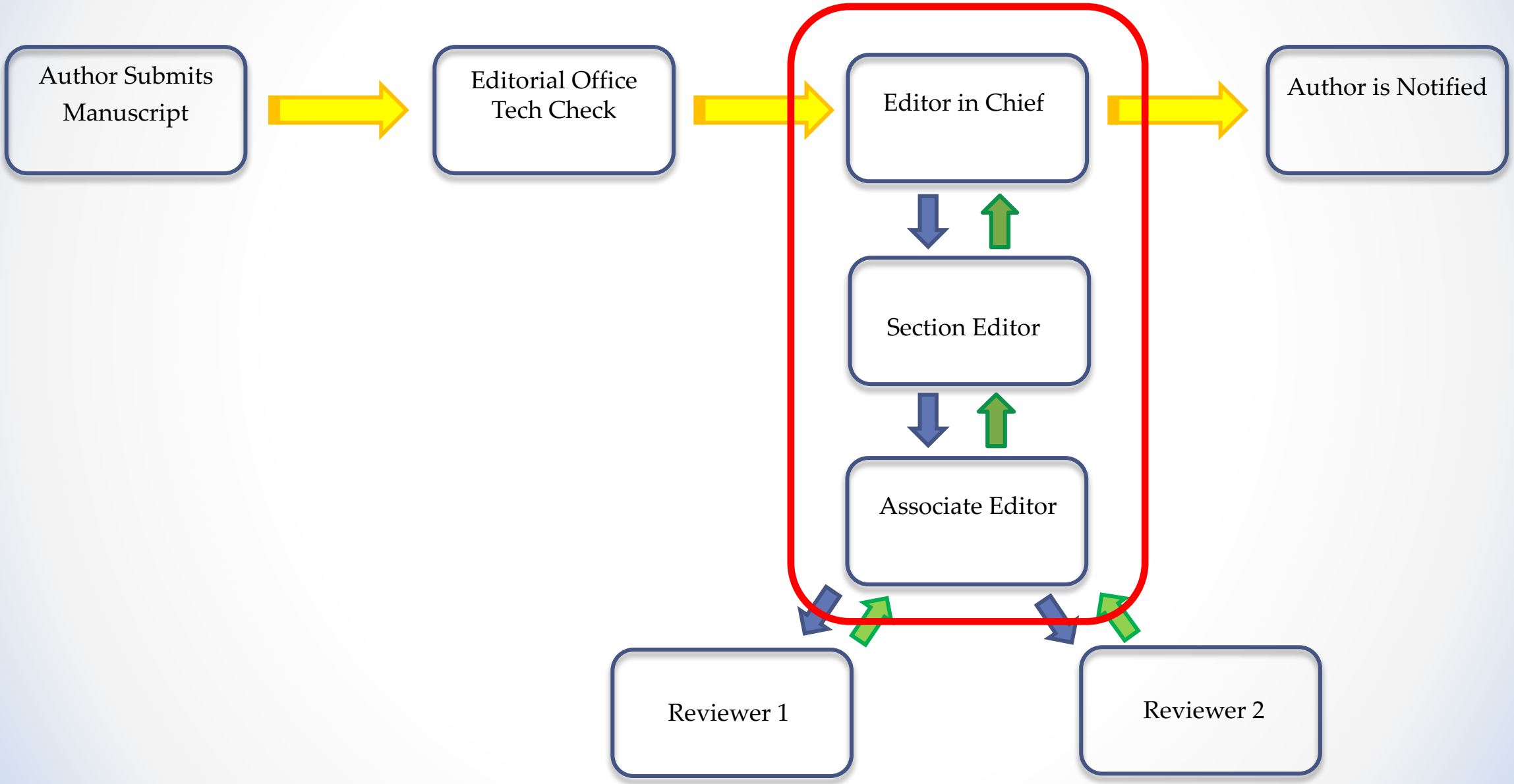


RoleManager - Editor



Assign Editor Chain

Sample Peer Review Workflow



Assign Editor Chain

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View Submission Duplicate Submission Check (...) Details Initiate Discussion History File Inventory Edit Submission Send Back to Author Remove Submission Classifications Assign Editor Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions	SALLYDEV130-D-16-00069	Original Study	Assign Editor Chain for EMUG 2016	Buzz Lightyear Aldrin PhD	May 6 2016 10:56AM	Submitted to Journal	May 6 2016 10

Assign Editor Chain

Assign Editor Chain

Manuscript Number: SALLYDEV130-D-16-00069

Title: Assign Editor Chain for EMUG 2016

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

Assign Individual Editor

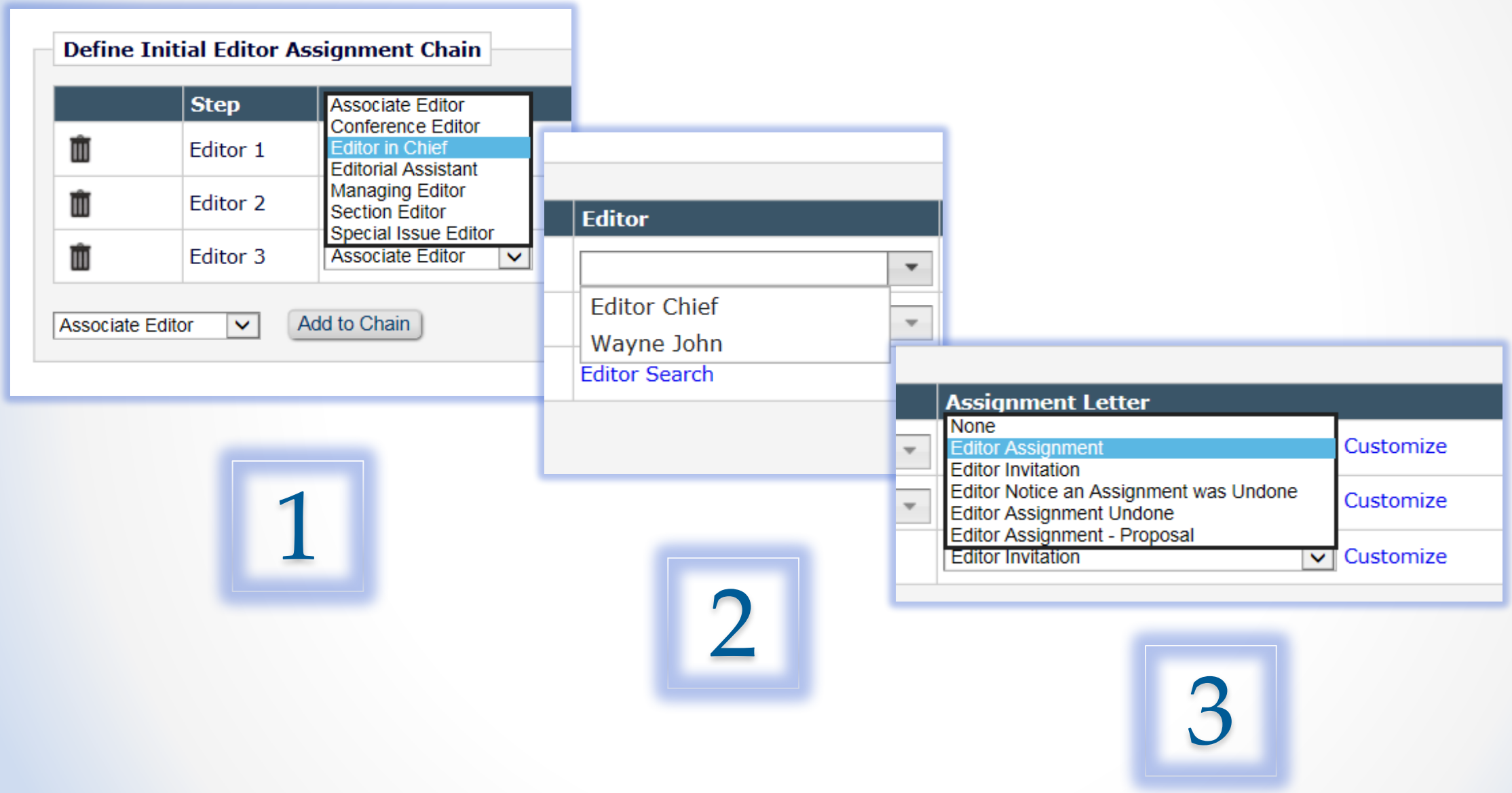
Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief		Editor Assignment Customize
	Editor 2	Section Editor		Editor Assignment Customize
	Editor 3	Associate Editor	Editor Search	Editor Invitation Customize

Associate Editor | Add to Chain

Cancel | Create Chain and Send Letters

Assign Editor Chain



Assign Editor Chain

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
🗑	Editor 1	Editor in Chief	Editor Chief	Editor Assignment Customize
🗑	Editor 2	Section Editor	Editor Michael	Editor Assignment Customize
🗑	Editor 3	Associate Editor	Editor Search	Editor Invitation Customize

Associate Editor | Add to Chain

(	Criterion	Is/Is not	Selector	Value	)		
	Editor Role	is	Equal To	Associate Editor		AND	Remove
	Last Name	is	Begins With	Editor			Remove

Add

Assign Editor Chain

Assign Editor Chain: Select

Manuscript Number: SALLYDEV130-D-16-00069

Title: Assign Editor Chain for EMUG 2016

The following have been identified as candidates for this Step in the Editor Chain. Select the Editor to return the Assign Editor Chain page where you can select and customize the Assignment Letter, if appropriate.

Editor 3: Associate Editor

Click the Blind Editors link to block access to this submission for one or more Editors.
Blind Editors

Cancel | Assign Selected Editor

Search Again

Page: 1 of 1 (1 total People Matches) Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
◉	Associate Editor	Harry Editor	3	0		Yes

Page: 1 of 1 (1 total People Matches) Display 10 results per page.

Search Again

Cancel | Assign Selected Editor

Assign Editor Chain

Assign Editor Chain

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Assign Individual Editor

Define Initial Editor Assignment Chain

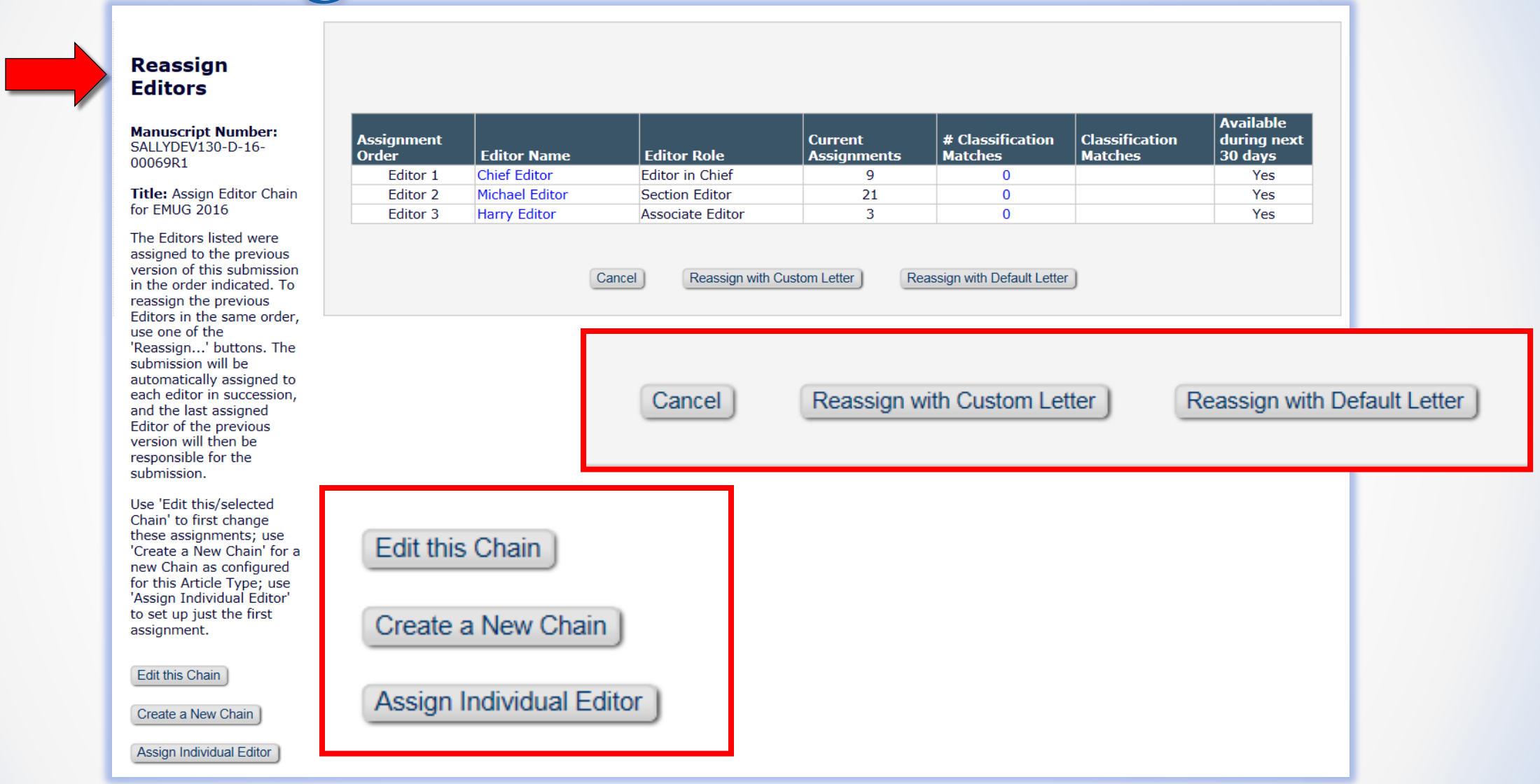
	Step	Role	Editor	Assignment Letter
🗑	Editor 1	Editor in Chief	Editor Chief	Editor Assignment — Customize*
🗑	Editor 2	Section Editor	Editor Michael	Editor Assignment — Customize
🗑	Editor 3	Associate Editor	Harry Editor [Search]	Editor Invitation — Customize

Associate Editor | Add to Chain

Cancel | Create Chain and Send Letters

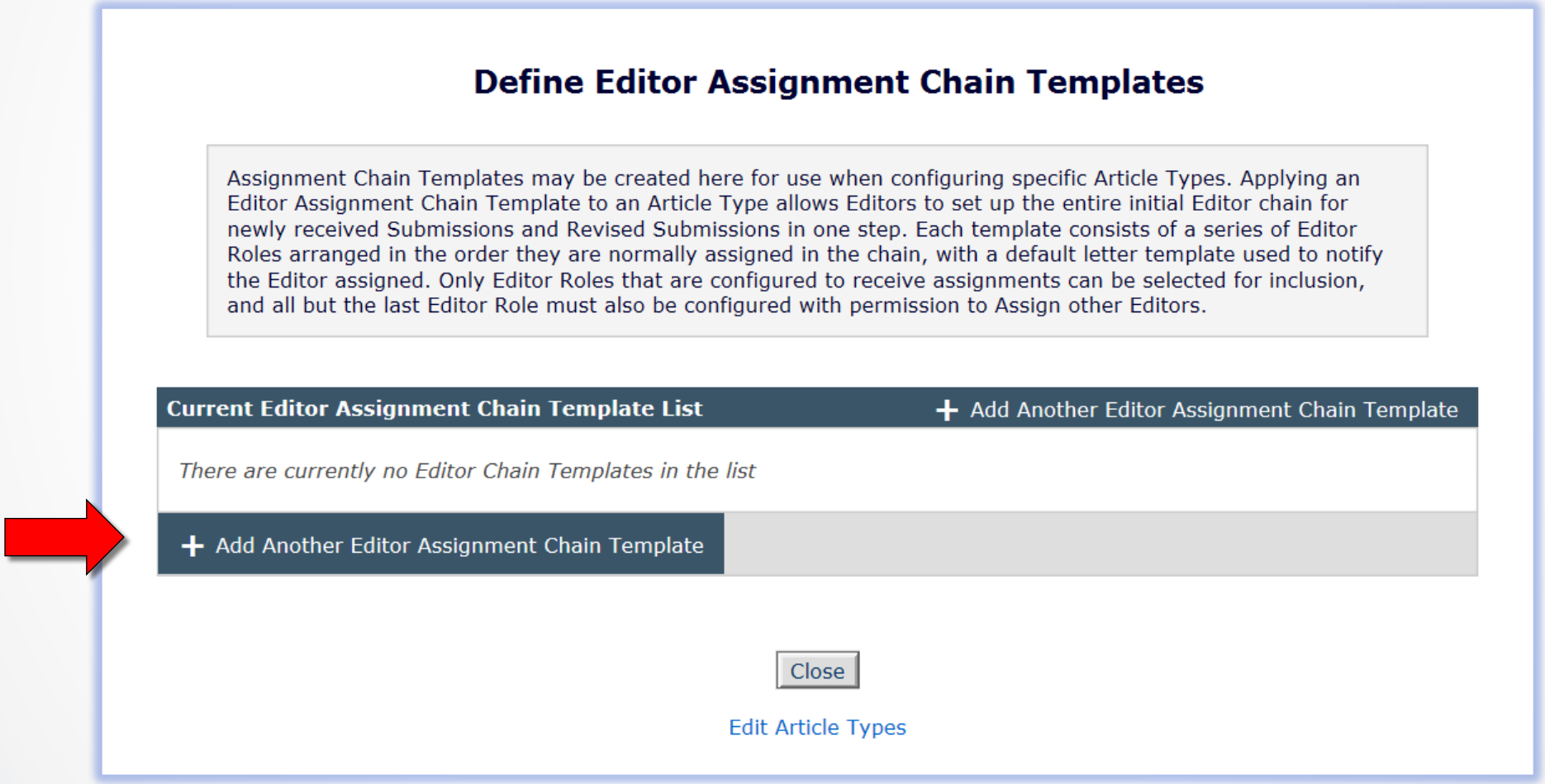
Assign Editor Chain

Assign Editors for Revision

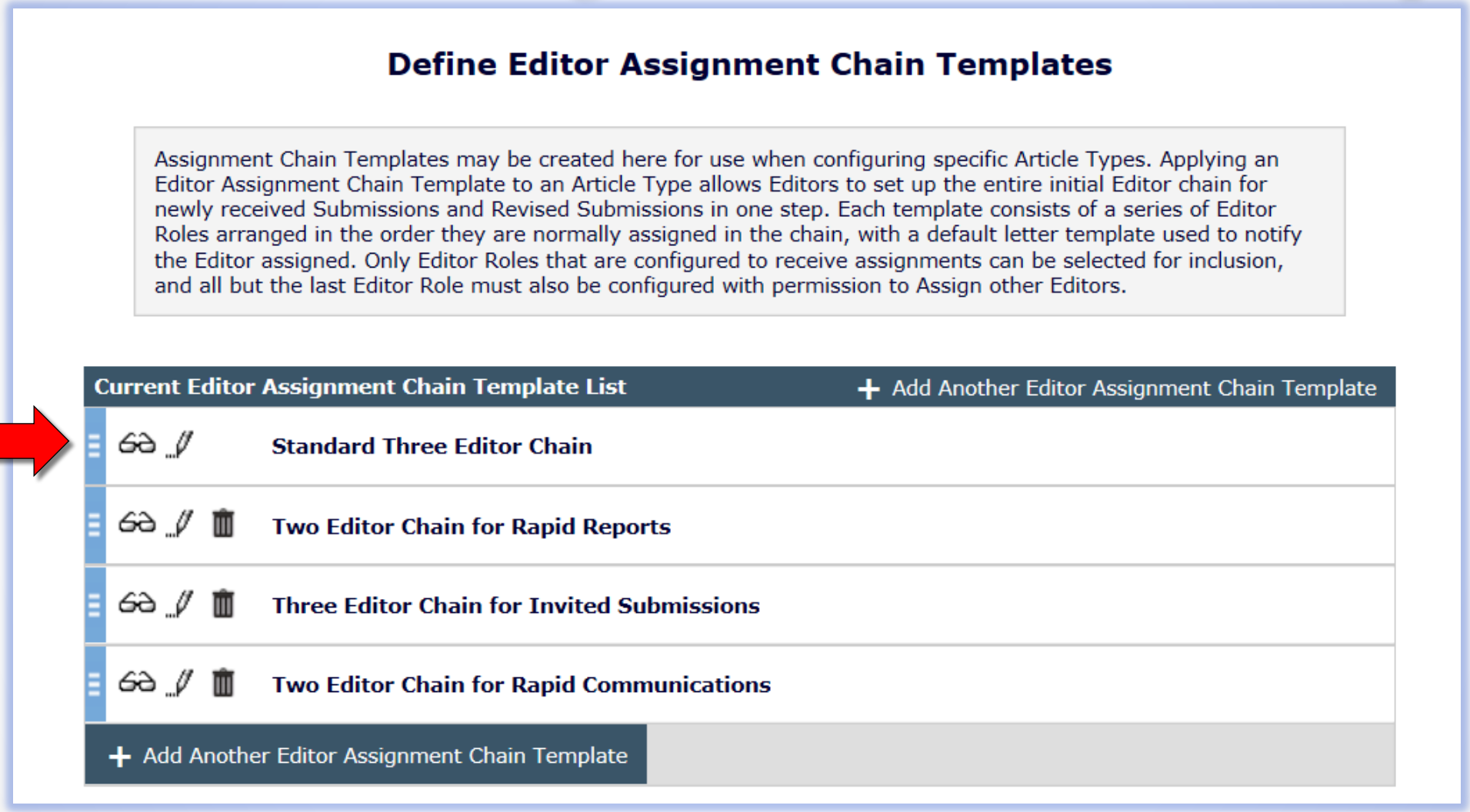


Add Editor Assignment Chain Template

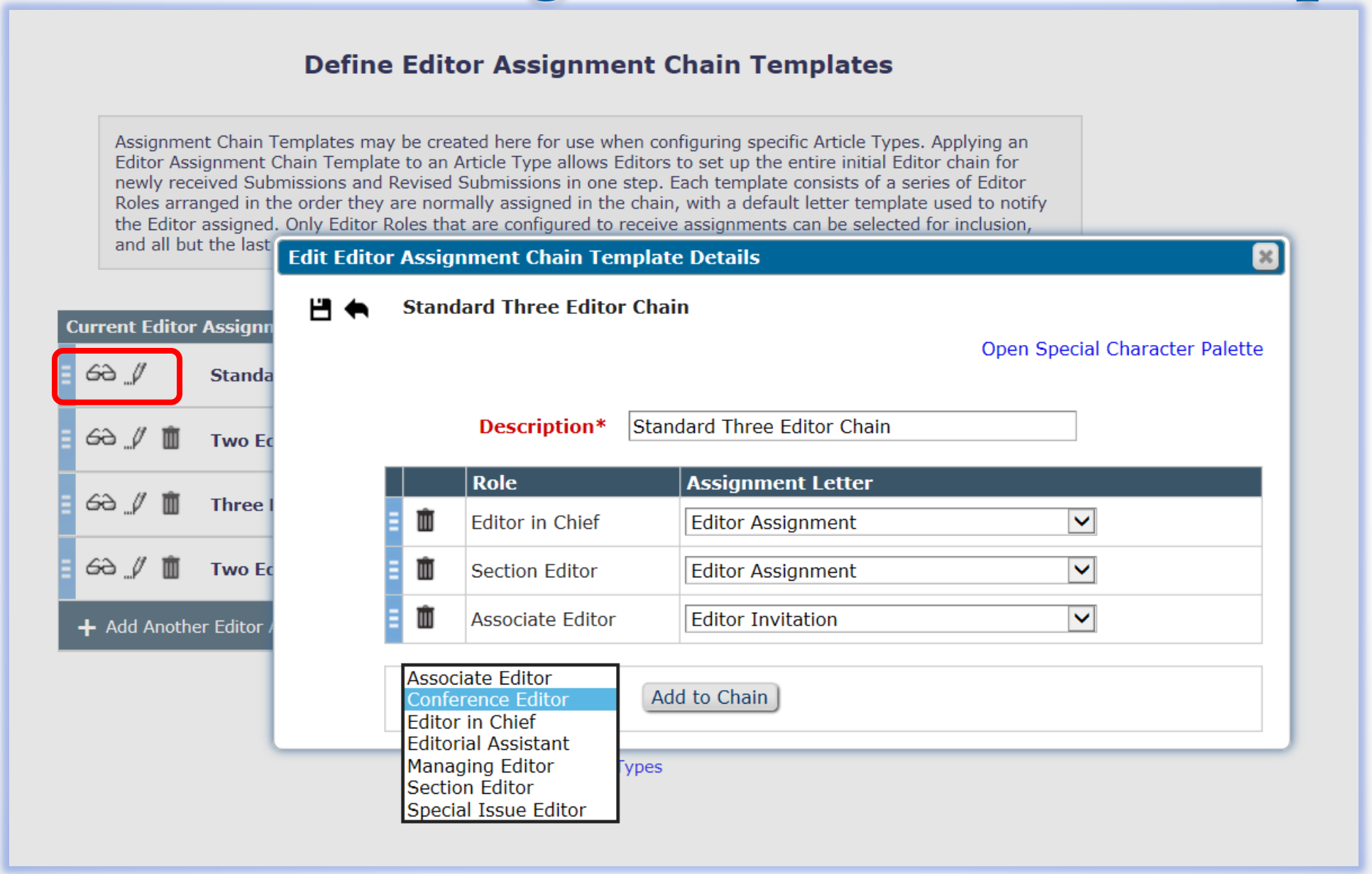
System Administration> PolicyManager > Editor Assignment Policies > Define Editor Assignment Chain Templates



Add Editor Assignment Chain Template

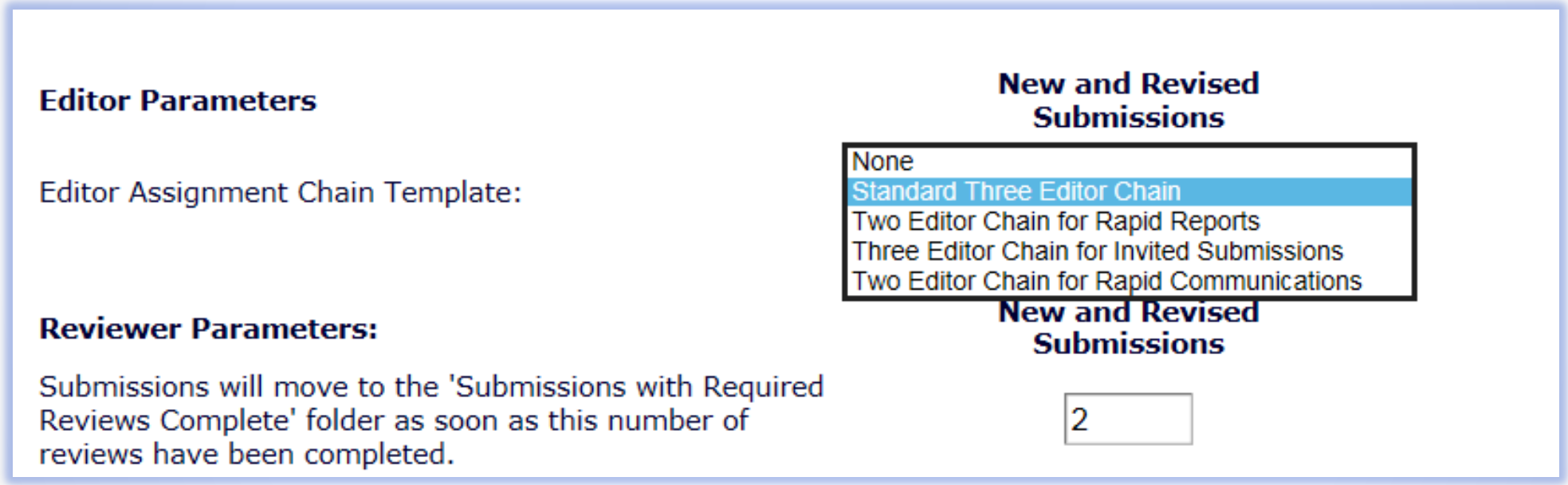


Edit Editor Assignment Chain Template



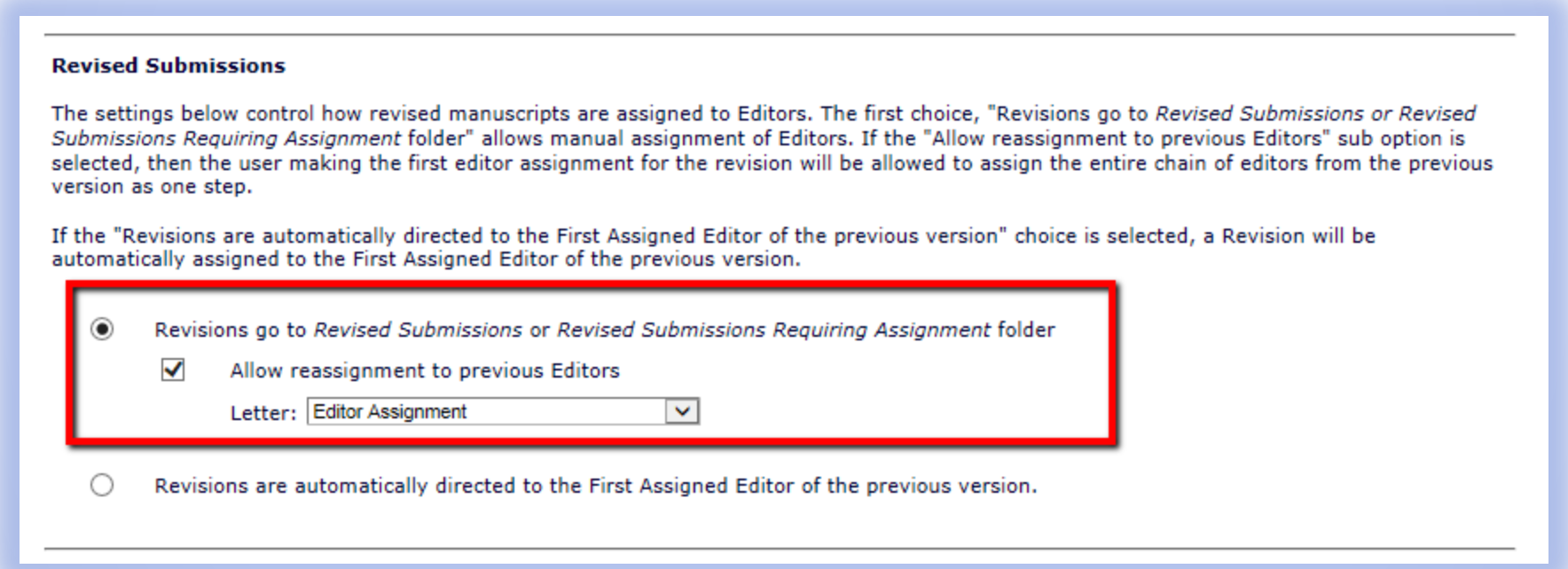
Select Assignment Chain Template per AT

System Administration> PolicyManager > Submission Policies > Edit Article Types



Set Editor Assignment Options

System Administration> PolicyManager > Editor Assignment Policies > Set Editor Assignment Options



Modify Editor Chain

Modify Editor Chain

- Remove or replace?
- Sometimes editor with **different** role can be substituted
- If decision saved or submitted, only replace with **same** role
- History is inherited
- Changes visible via details, history, reports
- Can send letters on modification

Factors Affecting Modification

- User's RM permissions
- User's relationship to submission and position in chain
- Has editor being modified saved or submitted a decision?
- Are there any unprocessed reviews?
- Has any editor in the chain saved or submitted a decision?
- Can any editor in the chain still save or submit a decision?