

Welcome to EEMUG 2017

13th Annual  European
Editorial Manager®
User Group Meeting



Prompts and Automation in Editor Workflows

Seb Atay
13th February 2017



13th Annual **em** Editorial Manager[®]
User Group Meeting



Introduction

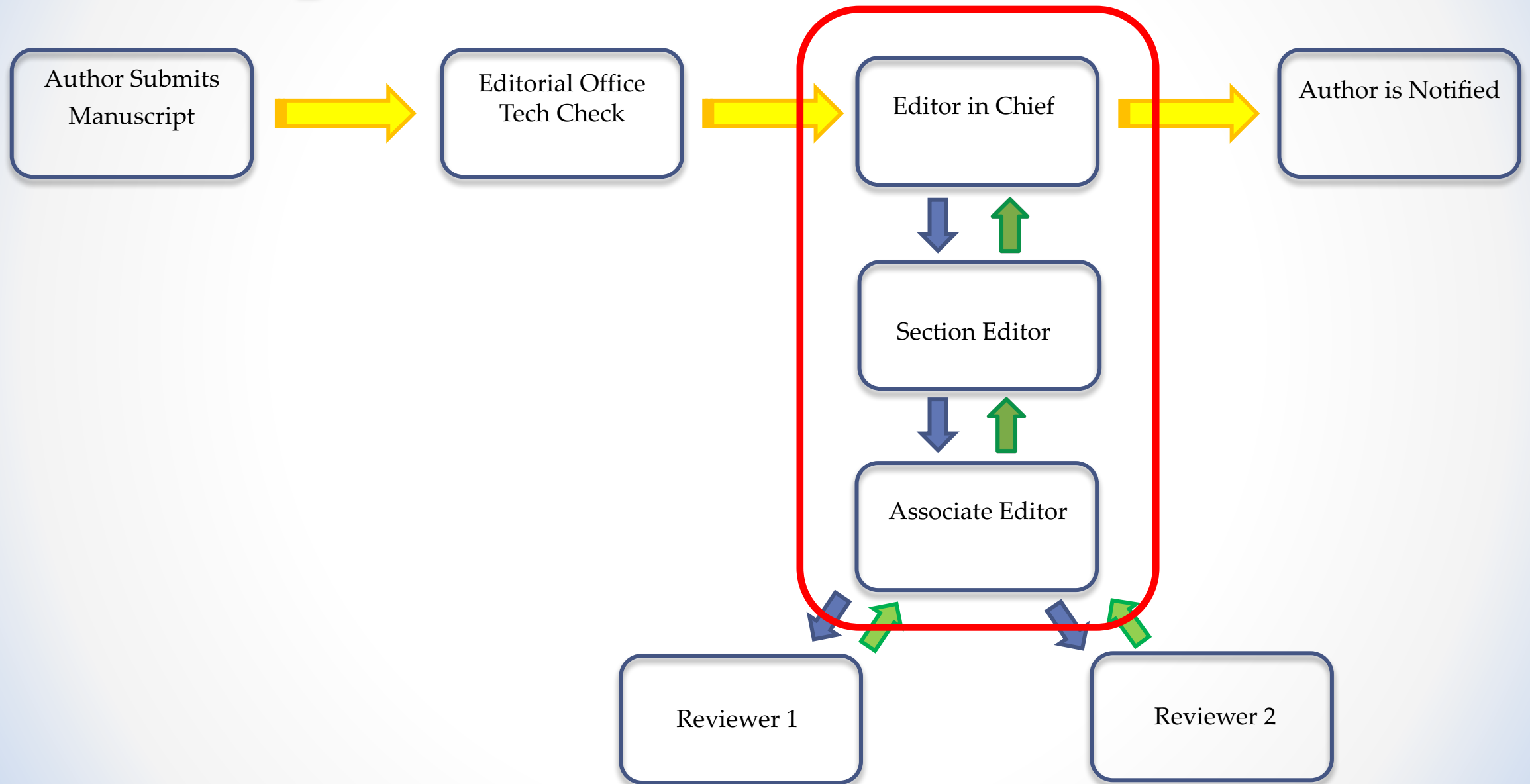
Aim

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





Sample Peer Review Workflow



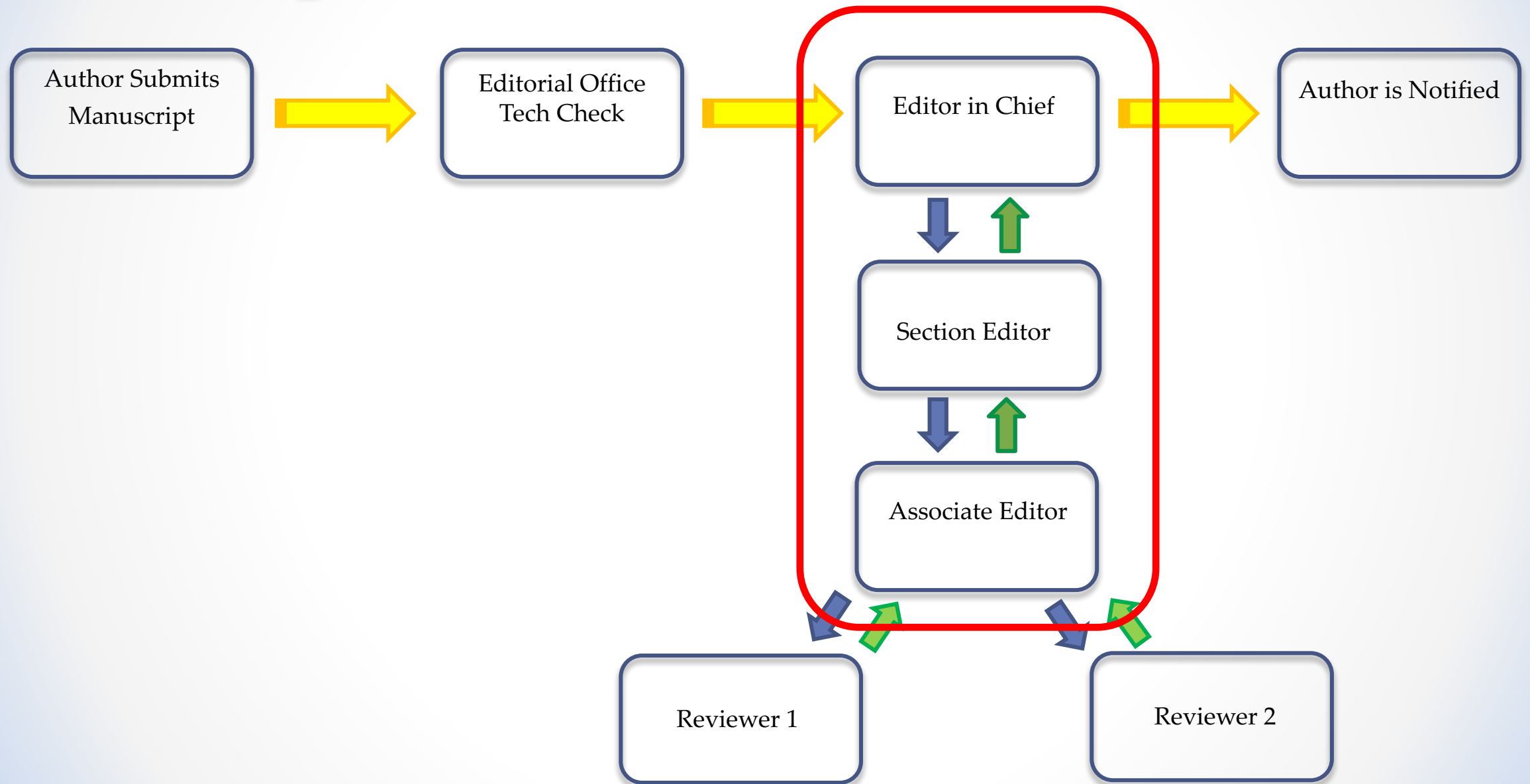
Editor Chains

- 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?

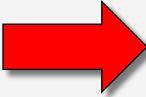
Classic Assignment

Classic Method

Editor 'To-Do' List

My Pending Assignments (48)

- Editorial Submissions in Progress (2)
- Transferred Submissions (1)
- New Submissions Requiring Assignment (20)
- Revised Submissions Requiring Assignment (1)
- Direct-to-Editor Revised Submissions (2)
- Submissions Needing Approval by Editor (2)
- Submissions Sent Back to Author for Approval (2)
- Incomplete Submissions (0)




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
<ul style="list-style-type: none">View SubmissionDuplicate Submission Check (...)Details ▾Initiate DiscussionHistoryFile InventoryEdit SubmissionSend Back to AuthorRemove SubmissionClassificationsAssign EditorSet Final DispositionInitiate ProductionSimilar Articles in MEDLINESend E-mailLinked Submissions	SALLYDEV130-D-16-00068	Original Study	EMUG 2016 - Editor Assignment Options	Buzz Lightyear Aldrin PhD ▾ !	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

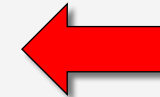
Use the search tool to identify the most appropriate person to handle this submission.

Click the Blind Editors link to block access to this submission for one or more Editors.
[Blind Editors](#)

[Insert Special Character](#)

[Value Options](#)

(Criterion	Is/Is not	Selector	Value)			
<input type="button" value="v"/>	Last Name	<input type="button" value="v"/>	is	<input type="button" value="v"/>	Begins With	<input type="button" value="v"/>	Editor	<input type="button" value="v"/>
<input type="text"/>								



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 to 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
<input type="radio"/>	Associate Editor	Harry Editor ▾	3	0		Yes
<input type="radio"/>	Editor in Chief	Chief Editor ▾	9	0		Yes
<input type="radio"/>	Managing Editor	Ed J Editor, MD ▾	2	0		Yes
<input checked="" type="radio"/>	Managing Editor	Sally Editor, PhD ▾	30	0		Yes
<input type="radio"/>	Section Editor	David Editor ▾	14	0		Yes
<input type="radio"/>	Section Editor	John Editor ▾	7	0		Yes
<input type="radio"/>	Section Editor	Michael Editor ▾	21	0		Yes

Page: 1 of 1 (7 total People Matches)

Display 10 results per page.

Search Again

Cancel

Send Custom Letters

Send Default Letters

Classic Method

New Editor Assignments - Sally Editor, PhD

Contents: These are submissions that have been Assigned to the Editor. They require one of the following: another Editor

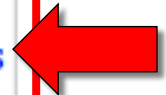
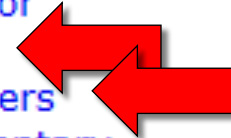
Page: 1 of 1 (3 total submissions)

Action	Manuscript Number	Article Type	Section/Category	Article Title
<ul style="list-style-type: none">View SubmissionDuplicate Submission Check (...)Details ▾Initiate DiscussionHistoryFile InventoryEdit SubmissionClassificationsUnassign EditorAssign EditorInvite ReviewersSolicit CommentarySet Final DispositionInitiate ProductionSimilar Articles in MEDLINESubmit Editor's Decision and CommentsSend E-mailLinked Submissions	SALLYDEV130-D-16-00068	Original Study		EMUG 2016 - Editor Assign Options

- View Submission
- Duplicate Submission Check (...)
- Details ▾
- Initiate Discussion
- History
- File Inventory
- Edit Submission
- Classifications
- Unassign Editor
- Assign Editor
- Invite Reviewers
- Solicit Commentary
- Set Final Disposition
- Initiate Production
- Similar Articles in MEDLINE
- Submit Editor's Decision and Comments
- Send E-mail
- Linked Submissions

ge the sort order.

Current Status
2016 4:49PM With Editor



RoleManager - Editor

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 displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

[Expand All](#)

[Collapse All](#)

New Submissions

Editor Assignment

Receive Assignments in 'New Assignments' Folder

Receive Assignments without Invitation

Receive Invitations for Assignments

Always Use Search-based selection for Editor Chain Assignment / Replacement
(i.e. if not Applied Automatically by System)

Assign Editor

RoleManager - Editor

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 displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

[Expand All](#)

[Collapse All](#)

New Submissions

Editor Assignment

Receive Assignments in 'New Assignments' Folder

Receive Assignments without Invitation

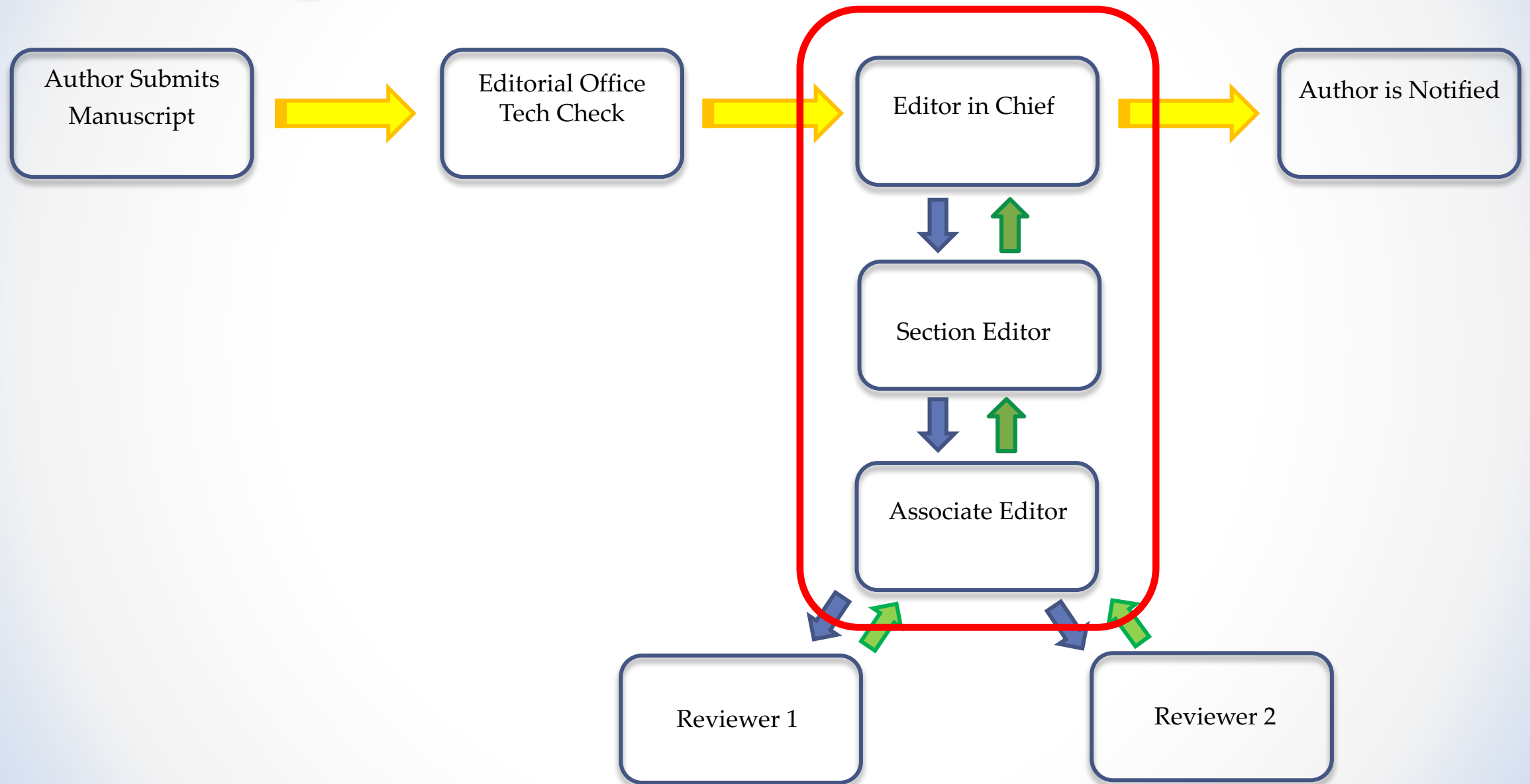
Receive Invitations for Assignments

Always Use Search-based selection for Editor Chain Assignment / Replacement
(i.e. if not Applied Automatically by System)

Assign Editor

Assign Editor Chain

Sample Peer Review Workflow



Assign Editor Chain

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 ▶▶

10 results per page. ⚙️

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Current Status	Status Date
<ul style="list-style-type: none">View SubmissionDuplicate Submission Check (...)Details ▾Initiate DiscussionHistoryFile InventoryEdit SubmissionSend Back to AuthorRemove Submission ClassificationsAssign Editor ←Set Final DispositionInitiate ProductionSimilar Articles in MEDLINESend E-mailLinked 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

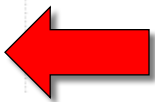
	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief <input type="text" value="v"/>	<input type="text" value=""/>	Editor Assignment <input type="text" value="v"/> Customize
	Editor 2	Section Editor <input type="text" value="v"/>	<input type="text" value=""/>	Editor Assignment <input type="text" value="v"/> Customize
	Editor 3	Associate Editor <input type="text" value="v"/>	Editor Search	Editor Invitation <input type="text" value="v"/> Customize

Associate Editor

Add to Chain

Cancel

Create Chain and Send Letters



Assign Editor Chain

Define Initial Editor Assignment Chain

	Step	
🗑️	Editor 1	Associate Editor Conference Editor Editor in Chief Editorial Assistant Managing Editor Section Editor Special Issue Editor Associate Editor
🗑️	Editor 2	
🗑️	Editor 3	

Associate Editor

Editor

Editor Chief
Wayne John
[Editor Search](#)

Assignment Letter

None	
Editor Assignment	Customize
Editor Invitation	
Editor Notice an Assignment was Undone	Customize
Editor Assignment Undone	
Editor Assignment - Proposal	
Editor Invitation	Customize

1

2

3

Assign Editor Chain

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Editor Chief <input type="text"/>	Editor Assignment <input type="text"/> Customize
	Editor 2	Section Editor <input type="text"/>	Editor Michael <input type="text"/>	Editor Assignment <input type="text"/> Customize
	Editor 3	Associate Editor <input type="text"/>	Editor Search	Editor Invitation <input type="text"/> Customize

Associate Editor

(Criterion	Is/Is not	Selector	Value)	
<input type="text"/>	Editor Role	is	Equal To	Associate Editor	AND	<input type="button" value="Remove"/>
<input type="text"/>	Last Name	is	Begins With	Editor		<input type="button" value="Remove"/>
						<input type="button" value="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 results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input checked="" type="radio"/>	Associate Editor	Harry Editor	3	0		Yes

Page: 1 of 1 (1 total People Matches)

Display results per page.

Search Again

Cancel

Assign Selected Editor

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

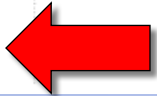
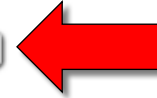
Define Initial Editor Assignment Chain

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

Associate Editor

Cancel

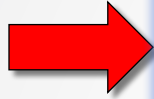
Create Chain and Send Letters



Assign Editor Chain

Editors		Top
Name:	Chief Editor <input type="checkbox"/> [Proxy]	
Role:	Editor in Chief	
Date Assigned:	May 6 2016 12:04PM	
Date Completed:		
Elapsed Days:	0	
Recommendation:		
<hr/>		
Name:	Michael Editor <input type="checkbox"/> [Proxy]	
Role:	Section Editor	
Date Assigned:	May 6 2016 12:04PM	
Date Completed:		
Elapsed Days:	0	
Recommendation:		
<hr/>		
Name:	Harry Editor <input type="checkbox"/> [Proxy]	
Role:	Associate Editor	
Date Assigned:	May 6 2016 12:04PM	
Date Completed:		
Elapsed Days:	0	
Recommendation:		

Assign Editors for Revision



Reassign Editors

Manuscript Number:
SALLYDEV130-D-16-00069R1

Title: Assign Editor Chain for EMUG 2016

The Editors listed were assigned to the previous version of this submission in the order indicated. To reassign the previous Editors in the same order, use one of the 'Reassign...' buttons. The submission will be automatically assigned to each editor in succession, and the last assigned Editor of the previous version will then be responsible for the submission.

Use 'Edit this/selected Chain' to first change these assignments; use 'Create a New Chain' for a new Chain as configured for this Article Type; use 'Assign Individual Editor' to set up just the first assignment.

Edit this Chain

Create a New Chain

Assign Individual Editor

Assignment Order	Editor Name	Editor Role	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
Editor 1	Chief Editor	Editor in Chief	9	0		Yes
Editor 2	Michael Editor	Section Editor	21	0		Yes
Editor 3	Harry Editor	Associate Editor	3	0		Yes

Cancel

Reassign with Custom Letter

Reassign with Default Letter

Cancel

Reassign with Custom Letter

Reassign with Default Letter

Edit this Chain

Create a New Chain

Assign Individual Editor

Add Editor Assignment Chain Template

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

Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor Assignment Chain Template List

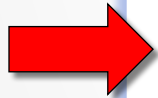
[+ Add Another Editor Assignment Chain Template](#)

There are currently no Editor Chain Templates in the list

[+ Add Another Editor Assignment Chain Template](#)

Close

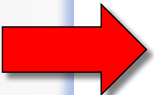







[Edit Article Types](#)



Add Editor Assignment Chain Template

Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last Editor Role must also be configured with permission to Assign other Editors.

Current Editor Assignment Chain Template List		+ Add Another Editor Assignment Chain Template
	  	Standard Three Editor Chain
	   	Two Editor Chain for Rapid Reports
	   	Three Editor Chain for Invited Submissions
	   	Two Editor Chain for Rapid Communications
+ Add Another Editor Assignment Chain Template		



Edit Editor Assignment Chain Template

Define Editor Assignment Chain Templates

Assignment Chain Templates may be created here for use when configuring specific Article Types. Applying an Editor Assignment Chain Template to an Article Type allows Editors to set up the entire initial Editor chain for newly received Submissions and Revised Submissions in one step. Each template consists of a series of Editor Roles arranged in the order they are normally assigned in the chain, with a default letter template used to notify the Editor assigned. Only Editor Roles that are configured to receive assignments can be selected for inclusion, and all but the last

Current Editor Assignments

- Standard Three Editor Chain
- Two Editor Chain
- Three Editor Chain
- Two Editor Chain

+ Add Another Editor

Edit Editor Assignment Chain Template Details

Standard Three Editor Chain

Open Special Character Palette

Description* Standard Three Editor Chain

	Role	Assignment Letter
	Editor in Chief	Editor Assignment
	Section Editor	Editor Assignment
	Associate Editor	Editor Invitation

Associate Editor
Conference Editor
Editor in Chief
Editorial Assistant
Managing Editor
Section Editor
Special Issue Editor

Add to Chain

types

Select Assignment Chain Template per AT

System Administration > PolicyManager > Submission Policies >
Edit Article Types

Editor Parameters

Editor Assignment Chain Template:

Reviewer Parameters:

Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.

New and Revised Submissions

- None
- Standard Three Editor Chain
- Two Editor Chain for Rapid Reports
- Three Editor Chain for Invited Submissions
- Two Editor Chain for Rapid Communications

New and Revised Submissions

2

Set Editor Assignment Options

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

Revised Submissions

The settings below control how revised manuscripts are assigned to Editors. The first choice, "Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder" allows manual assignment of Editors. If the "Allow reassignment to previous Editors" sub option is selected, then the user making the first editor assignment for the revision will be allowed to assign the entire chain of editors from the previous version as one step.

If the "Revisions are automatically directed to the First Assigned Editor of the previous version" choice is selected, a Revision will be automatically assigned to the First Assigned Editor of the previous version.

Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder

Allow reassignment to previous Editors

Letter:

Revisions are automatically directed to the First Assigned Editor of the previous version.

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?