Welcome to EEMUG 2016

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Editors on Steroids

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Agenda

- Creating an Editor Assignment Chain

  - by assigning individual editors

  - by creating the entire Editor Chain in one action (new in version 12.1)

- Modifying an Editor Assignment Chain

  - by unassigning individual editors

  - by replacing or removing an assigned editor for any step of the Editor Chain (new in version 12.2)

Creating an Editor Chain

For New or Revised Submissions

Sample Peer Review Workflow
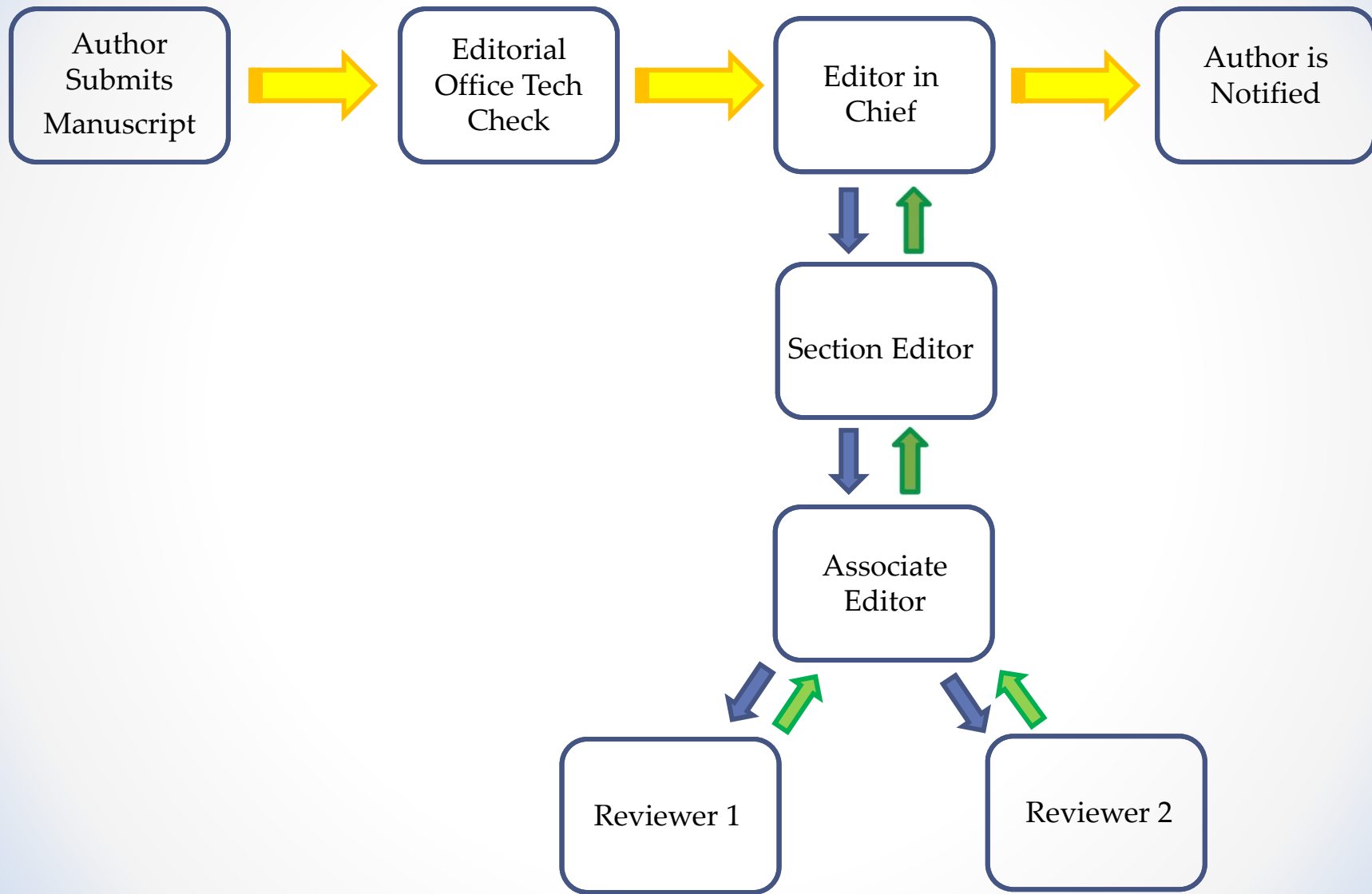
Creating an Editor Chain Manually

- The workflow is based on the assumption that one Editor assigns the submission on to another Editor

- Each Editor in turn may assign the submission on to another Editor, creating a chain

- Once the Editors submit their recommendations, the submission returns back up the chain that was created

Creating an Editor Chain Manually

Editor 'To-Do' List

My Pending Assignments (27)

Editorial Submissions in Progress (2)

Transferred Submissions (3)

New Submissions (0)

Revised Submissions (0)

New Submissions Requiring Assignment (1)
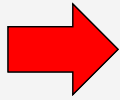
Revised Submissions Requiring Assignment (0)

Direct-to-Editor New Submissions (0)

Direct-to-Editor Revised Submissions (0)

Submissions Needing Approval by Editor (1)

Submissions Sent Back to Author for Approval (2)

Incomplete Submissions (11)

An Editorial Office user clicks the Assign Editor link

**New Submissions Requiring Assignment - Claire Editor**

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

Page: 1 of 1 (1 total submissions)

Display 10 ▼

☐ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/ Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Submi ▲▼
View Submission Duplicate Submission Check (15%) Details ⚐ Initiate Discussion History Technical Information File Inventory Edit Submission Send Back to Author Remove Submission Classifications Assign Editor Set Final Disposition Initiate Production Send E-mail Linked Submissions		Original Article		EEMUG 2016 - Editors on Steroids	Ivarr Philipsson ⚐	Dec 14
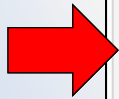
Creating an Editor Chain Manually

Assign Editor

Title: EEMUG 2016 - Editors on Steroids

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 ▼		▼		

Add

Clear   Search

The Editorial Office may search for an Editor. . .

Creating an Editor Chain Manually

Assign Editor

Title: EEMUG 2016 - Editors on Steroids

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

Select	Editor Role ▲▼	Editor Name ▲▼	Current Assignments ▲▼	# Classification Matches ▲▼	Classification Matches	Available during next 30 days
○	Associate Editor	Petra Baer ⚑	2	0		Yes
○	Associate Editor	Benjamin Penguin ⚑	2	0		Yes
○	Associate Editor	Quentin Penguin, JD ⚑	2	0		Yes
○	Associate Editor	Bertie Pony ⚑	0	0		Yes
○	Senior Editor	Harvey A. Hippopotamus ⚑	0	0		Yes
○	Senior Editor	Arie Kameel ⚑	3	0		Yes

Cancel | Send Custom Letters | Send Default Letters

…then the Editorial Office selects an Editor and sends either the default letter or a customised letter . . .

Creating an Editor Chain Manually

Assign Editor - Confirm Selection and Customize Letters

The following people are configured to receive a letter when an Editor is assigned to a submission.

Click **Customize** if you want to personalize a particular letter. Once you have customized a letter,an asterisk is displayed next to the person's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

To change the letter sent to an individual, click the Letter drop-down box next to that person's name and select a different letter. Note: if you personalize a letter, and then select a new letter, your personalized text will be lost.

If there is a person in the list to whom you do not want to send a letter, check the Do Not Send Letter box next to that person's name. When you click **Confirm Selections and Send Letters**, that person will not be sent a letter.

Editor Being Assigned

Name	Letter		Do Not Send Letter
Harvey A. Hippopotamus (Senior Editor)	Editor Assignment ▼	Customize	☐

Cancel   Confirm Selections and Send Letters

The Editorial Office clicks the <u>Customize</u> link to edit the selected letter . . .

Creating an Editor Chain Manually

Editor Assignment Confirmation

Harvey A. Hippopotamus has been assigned to manuscript number DEMOCG122-D-15-00005.

E-mail has been sent to the following individuals notifying them of the Editor assignment:

Harvey A. Hippopotamus (Senior Editor)

[Close]
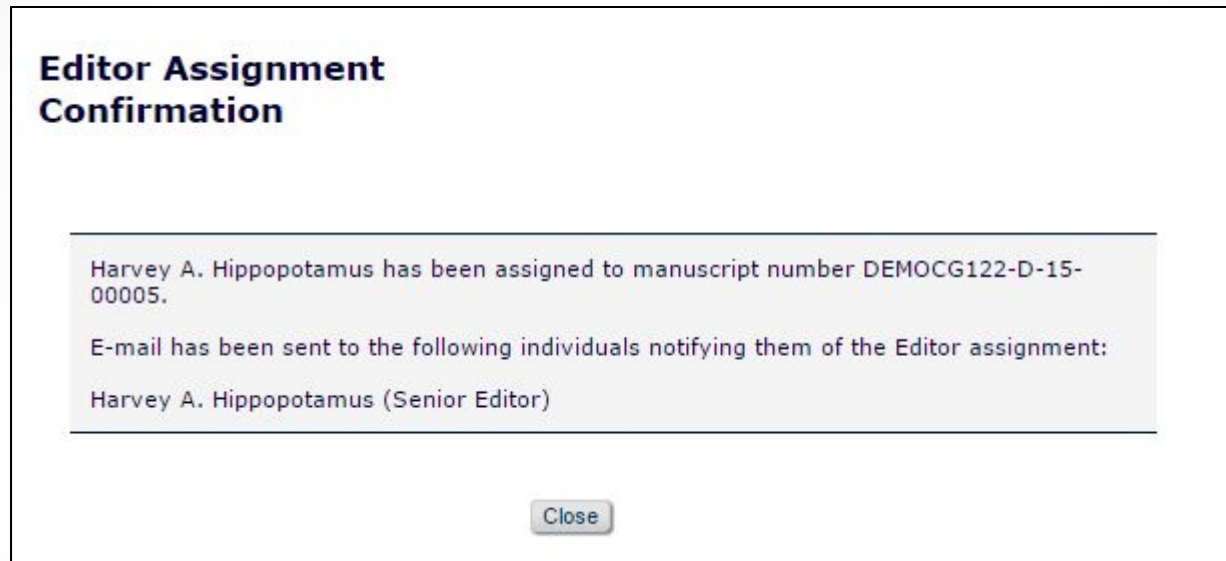
. . . and the first Editor is assigned!

Creating an Editor Chain Manually
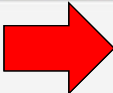
The Editorial Office locates the submission . . .

Creating an Editor Chain Manually

The Editorial Office can go to the *Details* page to proxy in as the first assigned Editor . . .

Creating an Editor Chain Manually

Editor 'To-Do' List

My Pending Assignments (1)

New Assignments (1)

Submissions with Required Reviews Complete (0)

Submissions Requiring Additional Reviewers (0)

Submissions with One or More Late Reviews (0)

Reviews in Progress (0)

Reviewers Invited - No Response (0)

Submissions Under Review (0)

New Editor Assignments - Harvey A. Hippopotamus

Contents: These are submissions that have been Assigned to the Editor. They require one of the following: another Editor assignment, Reviewer invitations, or Decision. Use the up/down arrows to chan

Page: 1 of 1 (1 total submissions)   Display 10 ▼ results per page.

⊟ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/ Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼	Cur Stat
View Submission Details ⊳ Initiate Discussion History File Inventory Classifications Unassign Editor Assign Editor Invite Reviewers Solicit Commentary Submit Editor's Decision and Comments Send E-mail	DEMOCG122-D-15-00005	Original Article		EEMUG 2016 - Editors on Steroids	Ivarr Philipsson ⊳	Dec 14, 2015	Dec 14, 2015	With

Creating an Editor Chain Manually

While proxied in as the first assigned Editor, the Editorial Office searches for and selects an Editor. . .

Creating an Editor Chain Manually

Assign Editor

Manuscript Number: DEMOCG122-D-15-00005

Title: EEMUG 2016 - Editors on Steroids

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 and customization proc

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 (6 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	Petra Baer ⚑	2	0		Yes
○	Associate Editor	Benjamin Penguin ⚑	2	0		Yes
○	Associate Editor	Quentin Penguin, JD ⚑	2	0		Yes
●	Associate Editor	Bertie Pony ⚑	0	0		Yes
	Senior Editor (This editor is already assigned to the current	Harvey A. Hippopotamus ⚑	1	0		Yes

Editor Assignment Confirmation

Bertie Pony has been assigned to manuscript number DEMOCG122-D-15-00005.

E-mail has been sent to the following individuals notifying them of the Editor assignment:

Bertie Pony (Associate Editor)

Close

The Editorial Office invites the next Editor – and then starts all over again to build the complete Editor Assignment Chain.

What's the Problem?

- Most publications use the same sequence of Editor Assignments to create an Editor Chain each time they process a submission

Journal Office → Editor-in-Chief → Section Editor → Associate Editor
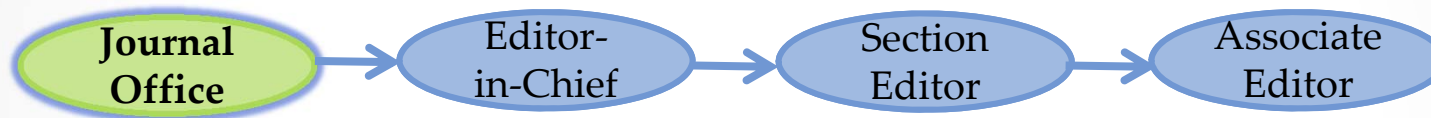
- Some publications rely on the Editorial Office to create the Chain to reduce the Editors' workload

- This means that the Editorial Office must proxy in for each Editor in turn in order to build the complete Editor Chain

- **What a tedious process!**

What if?

- The Editor Assignment Chain could be *created* in one action on a single page?

- Publications could create various templates that could then be associated with different Article Types and then use that template to assign specific Editors?

- A template could be created to preselect an Editor Role and default assignment letter for each step of the Chain?

- Revisions could be assigned using a template?

A new 'Assign Editor Chain' Feature is available in version 12.1!

New 'Assign Editor Chain' Feature

- New 'Assign Editor Chain' functionality is available in EM version 12.1

- System Administrators can create 'Assignment Chain Templates' in PolicyManager

- Templates can then be associated with individual Article Types

- When the Editorial Office clicks the <u>Assign Editor</u> link a new page is displayed showing the suggested Editor Roles and Assignment Letters

- The Editorial Office can select specific Editors, add or remove steps and customise Assignment Letters

New 'Assign Editor Chain' Feature

⊟ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/ Category ▲▼	Article Title ▲▼	Author Name ▲▼	Initial Date Submitted ▲▼	Status Date ▲▼
View Submission Duplicate Submission Check (50%) Details ⚑ Initiate Discussion History Technical Information File Inventory Edit Submission Send Back to Author Remove Submission Classifications Assign Editor Set Final Disposit Initiate Production Send E-mail Linked Submissions		Review		Editor Chains for EEMUG 2016	Ivarr Philipsson D ⚑	Dec 14, 2015	Dec 14, 2015

The Editorial Office clicks the Assign Editor Action Link, as in current functionality.

New 'Assign Editor Chain' Feature
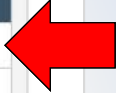
- The new *Assign Editor Chain* page is displayed based on the template associated with the submission's Article Type
- Each step is associated with a suggested Editor Role
- The Role determines how the Editors to be assigned are identified:
  - A combo box allows users to select from Editors in a dropdown list
  - The Editor Search link brings the user to a search interface
- The template's default Assignment Letter is displayed

New 'Assign Editor Chain' Feature

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter	
🗑	Editor 1	Senior Editor ▼	Editor Search	None ▼	Customize
🗑	Editor 2	Associate Editor		None ▼	Customize
🗑	Editor 3	Assistant Editor ▼	Muc Piggy	None ▼	Customize

Assistant Editor ▼   Add to Chain

Cancel   Create Chain and Send Letters

The mechanism used to identify the appropriate Editor for the assignment is defined by the Editor Role and can be:
- an Editor Search, looking for Editors with that role by name
- a drop down list of all Editors with that role
- a pre-selected name (where only one Editor has this role)

New 'Assign Editor Chain' Feature

Looking at the Editor Search, the Role for that step in the Chain is preselected but can be changed in the dropdown menu
You can then search for the Editor as usual

New 'Assign Editor Chain' Feature

When the Editor to be assigned is selected, the user clicks the 'Assign Selected Editor' button.

New 'Assign Editor Chain' Feature

The selected Editor is now displayed for the step in the Editor Assignment Chain, and the assigning Editor can click Customize to personalize the letter.

New 'Assign Editor Chain' Feature

New 'Assign Editor Chain' Feature

Additional 'Editor Steps' can be added to the Chain by selecting a Role and clicking the 'Add to Chain' button.

New 'Assign Editor Chain' Feature

If the proposed Editor or Role is invalid, an error icon ⚠ is displayed and the 'Create Chain and Send Letters' button is disabled.

New 'Assign Editor Chain' Feature

Informational text is displayed when the user hovers over the error icon.
Here the Role selected for Editor 3 does not have permission to assign other Editors, and therefore must be the last Editor in the Chain.

New 'Assign Editor Chain' Feature

The 'Assign Editor Chain' page does not allow an individual Editor to be assigned to more than one step in the Chain.

'Assign Editor Chain' Feature

Editors who have been 'blinded' to the submission are not displayed in the 'Editor' combo box and do not appear in search results.

New 'Assign Editor Chain' Feature

If the logged-in user prefers, he or she can click the 'Assign Individual Editor' button to assign only the first Editor, instead of assigning the entire Chain.

New 'Assign Editor Chain' Feature

After clicking the 'Assign Individual Editor' button, the user is prompted to select the first assigned Editor.

New 'Assign Editor Chain' Feature

After clicking the 'Assign Individual Editor' button, the 'Assign Editor' page displays all Editors with permission to receive assignments – not just Editors with a particular Role.

New 'Assign Editor Chain' Feature

Editor Assignment Confirmation

Bertie Pony has been assigned to manuscript number DEMOCG122-D-15-00005.

E-mail has been sent to the following individuals notifying them of the Editor assignment:

Bertie Pony (Associate Editor)

Close

When the user chooses to assign just the first Editor, the selected Editor is assigned as in current functionality.

'Assign Editor Chain' Configuration

- *PolicyManager*

    - *Define Editor Assignment Chain Templates* page

        o Create Templates

    - *Edit Article Type* page

        o Select Editor Assignment Chain Template per Article Type

    - *Set Editor Assignment Options* page (Revisions)

        o Revisions go to 'Revised Submissions' or 'Revised Submissions Requiring Assignment' folder

- *RoleManager – Editor Role*

    o Select or Search for Editor to assign

'Assign Editor Chain' Configuration

PolicyManager Main Menu

Expand All   Collapse All

⊞ **Registration and Login Policies**
⊞ **Status Policies**
⊞ **Submission Policies**
⊞ **Questionnaire Policies**
⊞ **Additional Data Policies**
⊟ **Editor Assignment Policies**
    Set Editor Assignment Options
    Define Editor Assignment Chain Templates
    Set Editor Rotation Participants
    Configure Automated Summary Reminders

⊞ **Reviewer and Editor Form Policies**
⊞ **E-mail and Letter Policies**
⊞ **General Policies**
⊞ **Discussion Forums**
⊞ **Linked Submissions Policies**
⊞ **Conference Submission Policies**
⊞ **Transmittal Policies**
⊞ **ProduXion Manager**

'Assign Editor Chain' Configuration

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

No 'Assignment Chain Templates' are defined upon upgrade.

'Assign Editor Chain' Configuration

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

Close

Edit Article Types

'Assign Editor Chain' Configuration

Click the glasses icon 👓 to view an existing 'Assignment Chain Temple'.

'Assign Editor Chain' Configuration

Click the pencil icon ✎ to edit an 'Assignment Chain Temple'.

'Assign Editor Chain' Configuration

The Editor Chain template must be valid in order for it to be saved. In this example, the Associate Editor does not have permission to assign other Editors and must be the last Editor in the Chain.

'Assign Editor Chain' Configuration
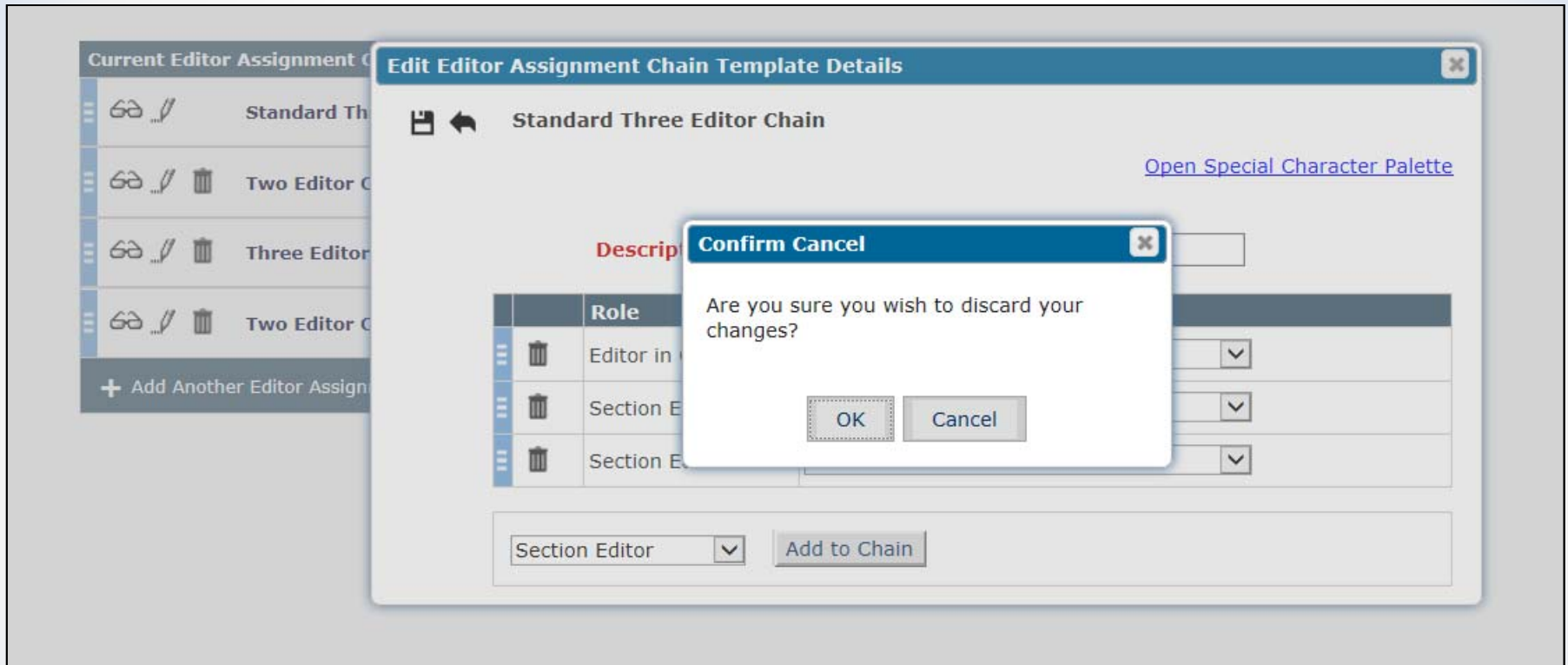
The logged-in user can click the 'Cancel' icon ⬅ to return to the 'Define Editor Assignment Chain Templates' page.

'Assign Editor Chain' Configuration

To create a new template, enter a 'Description' for the template and select a Role to add to the Chain.

'Assign Editor Chain' Configuration
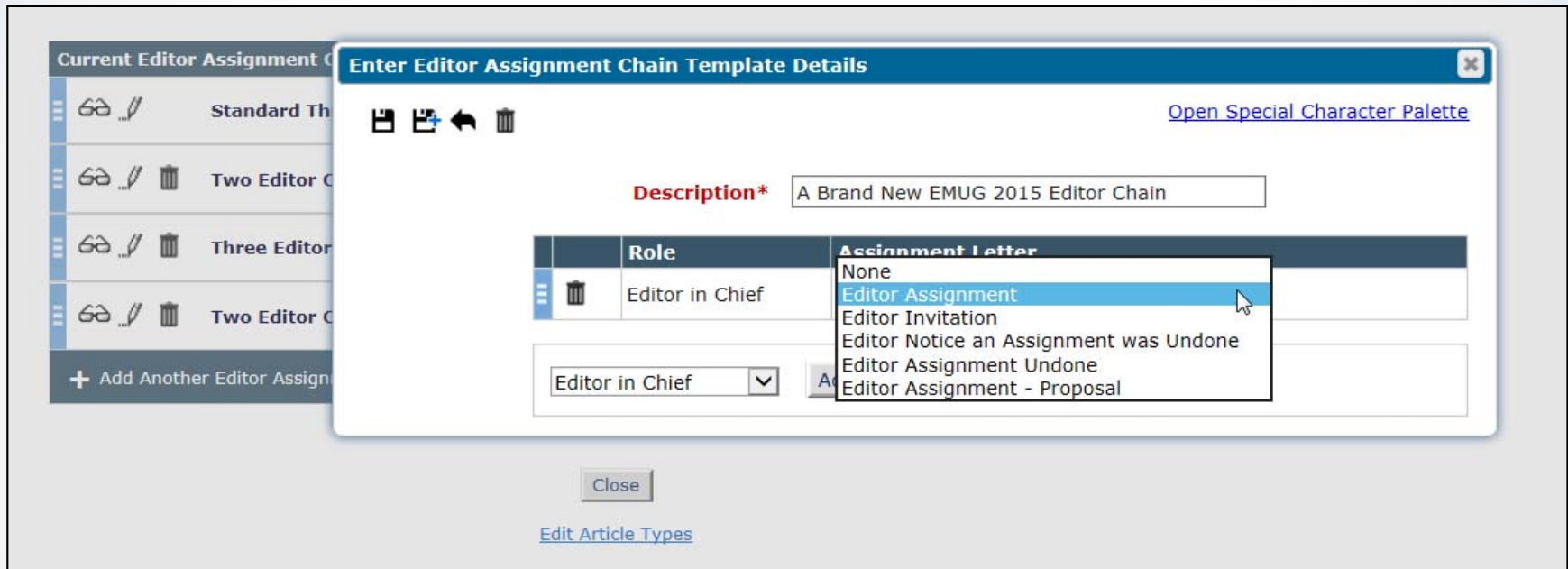
Continue adding Roles until the Chain template is complete. The Editor order does not matter yet – you will be able to sort the Editors after adding them to the template.

'Assign Editor Chain' Configuration

Edit Editor Assignment Chain Template Details ✕

A Brand New EMUG 2015 Editor Chain

Open Special Character Palette

Description* | A Brand New EMUG 2015 Editor Chain |

		Role	Assignment Letter
	🗑	Editor in Chief	Editor Assignment ▼
	🗑	Section Editor	Editor Invitation ▼
	🗑	Special Issue Editor	None ▼
	🗑	Special Issue Editor	Editor In...

Se... ▼ Add to Chain

Grab the blue gripper bar to sort the Editor Roles in the template.

'Assign Editor Chain' Configuration

The newly defined sort order is displayed.

'Assign Editor Chain' Configuration

Edit Article Type

Cancel   Submit

Article Type: Original Study

Maximum Article Type name is 75 characters.
Warning: changing the Article Type name will apply the name change to all submissions

Family: Regular   **Editor Use Only:** ☐

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

☐ Allow file uploads from arXiv.org server

Similarity Check: ☐ Send Reviewer PDF on Initial Submission
                          ☐ Send Reviewer PDF on First Revision
                          ☐ Send Reviewer PDF on Final Disposition to Accept

The System Administrator can select a default 'Editor Assignment Chain' template for each Article Type.

You must also set up Automatic Transfer to a checking service on the Configure Similarity Check page. Editor and Publisher Roles can be configured to send files by Automatic Transfer from the File Inventory or Technical Check pages even if you do not enable the options on this page.

Partial page displayed

Editor Parameters

New and
Subm

None ▼
None
A shiny new EEMUG chain!!
Two editor chain for rapid reviews
Standard three editor chain
Three editor chain for invited submissions

Editor Assignment Chain Template: Standard three editor

just the first Editor.

Reviewer Parameters: New and Revised
                                                             Submissions
Submissions will move to the 'Submissions with Required Reviews
Complete' folder as soon as this number of reviews have been   2   *Must be 0 or greater.*
completed.

Set this value to zero to turn off the

'Assign Editor Chain' Configuration

Set Editor Assignment Options

New Submissions

The settings below control how new manuscripts are assigned to Editors. The first choice, 'Submissions go to *New Submissions Requiring Assignment* folder' allows manual assignment of editors. The sub option "Submissions where Author has Selected an Editor" automatically directs the submission to the Editor selected by the Author at the 'Request Editor' manuscript submission step. The sub option 'Submissions where Author has Selected a Section/Category' automatically directs the submission to the Editor selected by the Author at the 'Select Section/Category' manuscript submission step.

If "Assign to Editors by Rotation" is selected, the submissions are automatically directed to the Editor with the oldest assignment date.

- ⦿ Submissions go to *New Submissions Requiring Assignment* folder
  - ☑ Except:
    - ⦿ Submissions where Author has selected an Editor
      Please also configure settings on the 'Set Request or Assign Editor Display Options' page.
    - ○ Submissions where Author has selected a Section/Category
      Please also assign Editors to sections or
- ○ Assign to Editor by Rotation
  Please also select Editors on the 'Set Editor Rotation Participan

Revised Submissions

The settings below control how revised manuscripts are assigned to Edito
Requiring Assignment folder" allows manual assignment of Editors. If the
first editor assignment for the revision will be allowed to assign the entire

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: [Editor Assignment ▼]
- ○ Revisions are automatically directed to the First Assigned Editor of the previous version.

> **HINT:** To assign the Editor Chain for revised submissions using a template, select the 'Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder' radio button.

'Assign Editor Chain' Configuration

Reassign Editors

Manuscript Number:
DEMOCG122-D-15-00006R1

Title: Editor Chains for EEMUG 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.

Assignment Order	Editor Name	Editor Role	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
Editor 1	Harvey A. Hippopotamus	Senior Editor	1	0		Yes
Editor 2	Bertie Pony	Associate Editor	1	0		Yes
Editor 3	Muc Piggy	Assistant Editor	0	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

Edit this Chain

Create a New Chain

Assign Individual Editor

'Assign Editor Chain' Configuration

Edit Role Definition

Role Name:*   Managing Editor

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**

- ☑ Receive New Submissions in 'New Subm...
  - ☑ Perform Technical Check (submissio...
- ☑ Receive New Transferred Submissions in...
- ☑ Submit Manuscript as an Editor
  - ☐ Restrict to 'Editor/Publisher Use Only...
  - ☑ Can set 'Accept on Submission' Final...

⊟ **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 (i.e. if not Applied Automatically by System)
- ☑ Assign Editor
- ☑ Redirect to Other Editor (and be removed from Editor Chain)
- ☑ Change Corresponding Editor
- ☑ Blind Editor
- ☑ Unassign Other Editors
- ☑ Unassign Myself

The *RoleManager – Editor* 'Always Use Search-based selection for Editor Chain Assignment' permission determines the method used to identify the Editor when assigning the Chain.
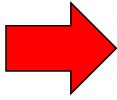
Modifying an Editor Chain

Replace or Remove an Editor

Current Unassign Editor Functionality

- Editors with permission can click the <u>Unassign Editor</u> Action Link to 'Unassign' or 'Switch' the assignment for the *lowest level Editor* in the Chain

- The lowest level Editor must not have saved or submitted an Editorial decision

- If the Editor is removed from the Chain, Reviewers are associated with the next highest Editor in the Chain

- If the assignment is switched to another Editor, reviews are associated with the new Editor

- Editors with 'Unassign Other Editors' and 'Assign Editor' permission can remove or replace the Editor at the *bottom of the Chain*

- Editors with 'Unassign Myself' and 'Assign Editor' permission – who are at the bottom of the Chain – can remove or replace *their own assignment*

Current Unassign Editor Functionality

If the current Editor Assignment Chain is:

Editor C can be removed from the Chain

or Editor C's assignment can be switched to another Editor.

Current Unassign Editor Functionality

If there is only one Editor in the Chain, and Reviewers *have not been* invited, the assignment can be rolled back.

Unassign Editor

Are you sure you want to unassign the Editor? If you unassign the Editor from this submission, David Editor will no longer be responsible for the submission, and the submission must be assigned to another Editor.

Click 'Switch to New Editor' to immediately assign a new Editor to the submission.

Click 'Roll Back to Previous Editor' to move the submission back up the chain to the Assigning Editor.

[Cancel] [Switch to New Editor] [Roll Back to Previous Editor]

If there is only one Editor in the Chain, and Reviewers *have bee*n invited the assignment can only be switched to another Editor.

Unassign Editor

Are you sure you want to unassign the Editor? If you unassign the Editor from this submission, Sally Editor, PhD will no longer be responsible for the submission, and the submission must be assigned to another Editor.

Click 'Switch to New Editor' to immediately assign a new Editor to the submission.

[Cancel] [Switch to New Editor]

Current Unassign Editor Functionality

If Reviewers have been invited or assigned:

Editor A → Editor B → Editor C → Reviewer

Editor C's assignment can be switched to another Editor:

Editor A → Editor B → Editor X → Reviewer

Or the assignment can be rolled back:

Editor A → Editor B → Reviewer

But no other Editors can be added to the Chain once the assignment has rolled back if Reviewers have been invited or assigned!

What if?

- The Editor Assignment Chain could be *modified* in one action on a single page?

- An Editor with permission could replace or remove an Editor for *any step* in the Editor Assignment Chain – not just the lowest level Editor?

- Editors could be replaced *after* they have submitted a decision?

- An Editor with permission could replace or remove multiple Editors in one action, on a single page?

- An Editor with permission could replace one Editor with another Editor who has a *different* Editor Role?

New 'Modify Editor Chain' Feature

NEW!

In EM v. 12.2, Editors can replace or remove an Editor from any step in the Editor Assignment Chain:

Modified Editor Assignment Chain:
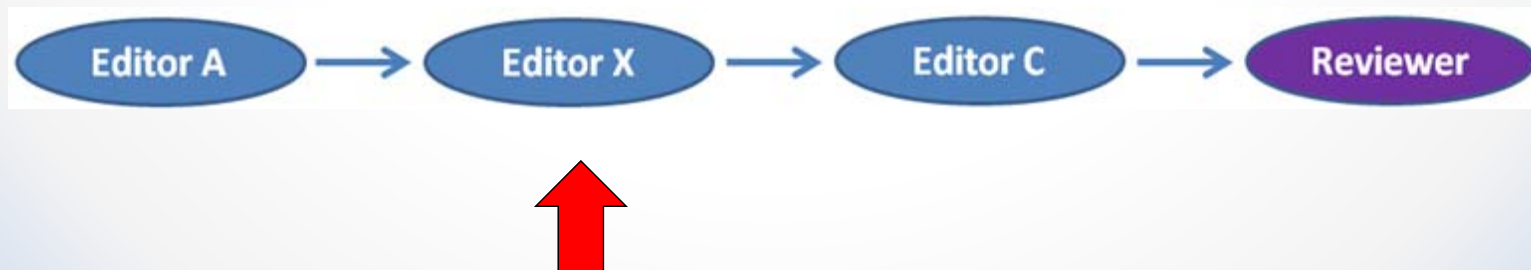
New 'Modify Editor Chain' Feature

Editors will be able to remove or replace more than one Editor in the Chain in one action on one page!

Modified Editor Assignment Chain:
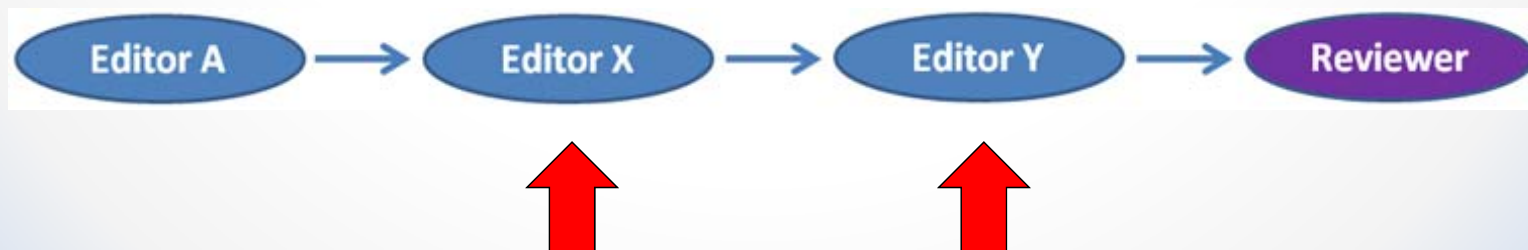
New 'Modify Editor Chain' Feature

- An Editor who has saved or submitted a decision can be replaced by another Editor with the *same Role*

- Under certain conditions, an Editor may be replaced by another Editor with a *different Role*

- Replacement Editors inherit the history of the Editor they have replaced

- Under certain conditions, an Editor may be removed from the Chain altogether

- Default or customized letters may be sent

- Modifications to the Editor Chain are visible on the Custom *Details* page, the *History* page and in Reports

New 'Modify Editor Chain' Feature

Action	Manuscript Number	Article Type	Section/ Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor with Current Responsibility	Review Status	View Decision
View Submission Duplicate Submission Check (50%) Details History Classifications Unassign Editor File Inventory Edit Submission Invite Reviewers Solicit Commentary Notify Editor View Reviews and Comments Set Final Disposition Initiate Production Send E-mail Linked Submissions	DEMOCG122-D-15-00006R1	Review		Editor Chains for EEMUG 2016	Ivarr Philipsson	Dec 14, 2015	Dec 15, 2015	With Editor	Muc Piggy		Revise

The Unassign Editor link is displayed for Editors with access to the submission and permission to modify the Chain, up to the point that the Final Disposition is set for the submission.

Clicking the link brings the user to the new *Modify Editor Chain* page.

New 'Modify Editor Chain' Feature

Modify Editor Chain

View Reviews and Comments

Manuscript Number:
DEMOCG122-D-15-00006R1

Title: Editor Chains for EEMUG 2016

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor Assignments as needed and send the selected letters.

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
🗑	Editor 1	Harvey A. Hippopotamus Senior Editor	Senior Editor ▼	▼
🗑	Editor 2	Bertie Pony Associate Editor	Associate Editor ▼	▼
🗑	Editor 3	Muc Piggy Assistant Editor	Assistant Editor ▼	▼

Cancel   Confirm Selections and Send Default Letters   Confirm Selections and Send Custom Letters

In this example, the logged-in Editor is either not in the Chain AND has permission to remove / replace other Editors OR is the first Editor in the Chain and has permission to remove or replace their assignment or that of subordinate Editors.

New 'Modify Editor Chain' Feature

Modify Editor Chain

View Reviews and Comments

Manuscript Number:
DEMOCG122-D-15-00006R1

Title: Editor Chains for EEMUG 2016

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor Assignments as needed and send the selected letters.

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	Harvey A. Hippopotamus Senior Editor	Senior Editor	This Editor cannot be replaced
	Editor 2	Bertie Pony Associate Editor	Associate Editor	This Editor cannot be replaced
🗑	Editor 3	Muc Piggy Assistant Editor	Assistant Editor	▼

Cancel   Confirm Selections and Send Default Letters   Confirm Selections and Send Custom Letters

In this example, Editor 3 is the logged-in Editor

They have not saved or submitted a decision and they only have permission to remove or replace their own Editor assignment.

New 'Modify Editor Chain' Feature

You can choose to edit the Role that should be assigned using the dropdown in the 'Role' column
The 'New Editor' column displays Editors with the Role selected

New 'Modify Editor Chain' Feature

Modify Editor Chain

View Reviews and Comments

Manuscript Number:
DEMOCG122-D-15-00006R1

Title: Editor Chains for EEMUG 2016

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm... click 'Confirm Selecti... Send Default Letters'... 'Confirm Selections a... Custom Letters'. The... will update Editor Ass... as needed and send... selected letters.

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
🗑	Editor 1	Harvey A. Hippopotamus Senior Editor	Senior Editor ▾	▾
🗑	Editor 2	Bertie Pony Associate Editor	Associate Editor ▾	Editor Search
🗑	Editor 3	Muc Piggy Assistant Editor	Assistant Editor ▾	▾

Cancel   Confirm Selections and Send Default Letters   Confirm Selections and Send Custom Letters

Insert Special Character   Value Options

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

Clear   Search

When searching for an Editor, the Role name is preselected on the search page.
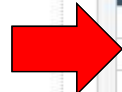
New 'Modify Editor Chain' Feature

Editor Search

Manuscript Number: DEMOCG122-D-15-00006R1

Title: Editor Chains for EEMUG 2016

Please select the Editor whom you would like to assign for this step in the Editor Assignment Chain. You will be allowed to send this Editor either the default editor assignment letter or a customized letter.

Editor 2: Associate Editor

Click the Blind Editor

The Editor selected on the search results page is now displayed on the "Modify Editor Chain" page. When a valid change is proposed, the "Confirm Selections . . ." buttons are enabled.

Page: 1 of 1 (4 total Peop

Select	Editor Role	Editor Name	Current Assignments	Classification Matches	Classification Matches	during next 30 days
○	Associate Editor	Petra Baer ⚑	2	0		Yes
⦿	Associate Editor	Benjamin Penguin ⚑	2	0		Yes
○	Associate Editor	Quentin Penguin, JD ⚑	2	0		Yes

Modify Editor Chain

View Reviews and Comments

Manuscript Number: DEMOCG122-D-15-00006R1

Title: Editor Chains for EEMUG 2016

The current Editor Assignment Chain is displayed. You may remove an Editor by clicking the delete icon or may replace an Editor for a particular step in the Chain. To confirm changes, click 'Confirm Selections and Send Default Letters' or 'Confirm Selections and Send Custom Letters'. The system will update Editor Assignments as needed and send the selected letters.

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
🗑	Editor 1	Harvey A. Hippopotamus Senior Editor	Senior Editor ▼	_____ ▼
🗑	Editor 2	Bertie Pony Associate Editor	Associate Editor ▼	Benjamin Penguin [Search]
🗑	Editor 3	Muc Piggy Assistant Editor	Assistant Editor ▼	_____ ▼

Cancel   Confirm Selections and Send Default Letters   Confirm Selections and Send Custom Letters

New 'Modify Editor Chain' Feature

Editors who have submitted a decision cannot be removed – they can only be replaced by another Editor who has the *same* Role.

In this example, the logged-in user has permission to unassign other Editors, but does not have permission to replace Editors in the Chain. Since all Editors have submitted decisions they cannot be removed.

New 'Modify Editor Chain' Feature

In this example, Editor 3 is the only user with an "Assistant Editor" Role. Text is displayed that reads,
"No users have this Role".

New 'Modify Editor Chain' Feature

Once Editors have made a decision, their assignment can be switched to another Editor with the *same* Editor Role, but they cannot be removed from the Editor Assignment Chain.

New 'Modify Editor Chain' Feature

If there is only one Editor and Reviewers have been invited or assigned, the trash can icon is not visible.
The only Editor in the Chain can be replaced but not removed, as someone has to handle the incoming reviews!

New 'Modify Editor Chain' Feature

When the proposed changes are valid, the 'Confirm Selections and Send Default Letters' and 'Confirm Selections and Send Custom Letters' buttons are enabled.

New 'Modify Editor Chain' Feature

Letters can be customized for those recipients whose Role is configured to receive notifications for these events in ActionManager.

New 'Modify Editor Chain' Feature

Editor Assignment Confirmation

The following changes have been made for submission: DEMOCG122-D-15-00006R1

- Harvey A. Hippopotamus has been replaced by Arie Kameel
- Bertie Pony has been replaced by Benjamin Penguin

E-Mail has been sent to the following individuals notifying them of the Editor assignment changes:

Harvey A. Hippopotamus (Senior Editor)
Arie Kameel (Senior Editor)
Claire Editor (Managing Editor)
Bertie Pony (Associate Editor)
Muc Piggy (Assistant Editor)
Benjamin Penguin (Associate Editor)

Close

The *Confirmation* page identifies all changes to the Editor Assignment Chain and lists email recipients.

New 'Modify Editor Chain' Feature

	Editors	Top
Name:	Arie Kameel ⚑ [Proxy] (Replaced Harvey Hippopotamus)	
Role:	Senior Editor	
Date Assigned:	Dec 15, 2015	
Date Completed:		
Elapsed Days:	0	
Recommendation:		
Name:	Benjamin Penguin ⚑ [Proxy] (Replaced Bertie Pony)	
Role:	Associate Editor	
Date Assigned:	Dec 15, 2015	
Date Completed:	Dec 15, 2015	
Elapsed Days:	0	
Recommendation:	Provisional Accept	
Name:	Muc Piggy ⚑ [Proxy]	
Role:	Assistant Editor	
Date Assigned:	Dec 15, 2015	
Date Completed:	Dec 15, 2015	
Elapsed Days:	0	
Recommendation:	Provisional Accept	

The changes are recorded on the *Details* page

'Modify Editor Chain' Configurations

RoleManager – Editor

Edit Role Definition

Role Name:* [Managing Editor]

Maximum Role name is

Check the functions that this role is permitted to perform. Note : in boxes
select or deselect multiple terms by holding down the CTRL (PC) or

Expand All   Collapse All

⊞ **New Submissions**

⊟ **Editor Assignment**

  ☑ Receive Assignments

    Classic Method of Editor Assignment

    ⦿ 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 Using Single Editor Selection

  ☑ Assign Editor Using Suggested Editor Queue

    ☑ Close Queue and Assign Editor

  ☑ Redirect to Other Editor (and be rem

  ☑ Change Corresponding Editor

☑ Blind Editor

➡ ☑ Unassign Other Editors ⬅

➡ ☑ Unassign Myself

  ☐ Unassign Subordinate Editors

  ☐ Replace Editor

⊞ **Reviewer Invitations**

⊞ **Editor Decisions**

⊞ **Proposals/Commentaries**
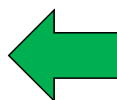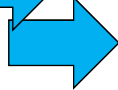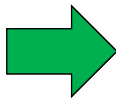
A Few Options:

- 'Unassign Other Editors' + 'Assign Editor'
- 'Unassign Myself' + 'Unassign Subordinate Editors' + 'Replace Editor'
- 'Unassign Myself' + 'Unassign Subordinate Editors'
- 'Unassign Myself' + 'Replace Editor'

'Modify Editor Chain' Configurations

RoleManager – Editor

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

- Editorial Office User

  - 'Assign Editor'

  - 'Unassign Other Editors'

- Editor in the Chain

  - 'Unassign Myself'

    o 'Unassign Subordinate Editors'

    o 'Replace Editor'

'Modify Editor Chain' Configurations

PolicyManager Main Menu

Expand All   Collapse All

⊞ **Registration and Login Policies**
⊞ **Status Policies**
⊞ **Submission Policies**
⊞ **Questionnaire Policies**
⊞ **Additional Data Policies**
⊟ **Editor Assignment Policies**
    Set Editor Assignment Options
    Set Editor Rotation Participants
    Edit Instructions on the Modify Editor Chain Page
    Configure Automated Summary Reminders

⊞ **Suggest Editor Policies**
⊞ **Reviewer and Editor Form Policies**
⊞ **E-mail and Letter Policies**
⊞ **General Policies**

Publications can customize the instructional text that is displayed on the 'Modify Editor Chain' page.

'Modify Editor Chain' Configurations

Publications can enter customized text . . .

'Modify Editor Chain' Configurations

. . . And can view or revert to the default instructions.

Summary

Assign Editor Chain (v. 12.1)

- The Editor Assignment Chain can be *created* in one action on a single page
- Publications can create various templates that are then applied to Article Types
- Editor Roles can be pre-selected for each step in the Chain
- Default letters can be associated for each Editor
- Additional Editors can be added when assigning the Chain
- Can be used to assign revisions
- Can only be used when assigning the first Editor in the Chain

Modify Editor Chain (v. 12.2)

- The Editor Assignment Chain can be *modified* in one action on a single page
- Editors with permission can remove or replace an Editor for any step in the Chain (subject to conditions)
- Editors can be replaced after submitting a decision, until the Final Disposition is set
- Editors can be replaced by another Editor with a different Role (subject to conditions)

Questions?