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EMUG 2023



Courtyard Boston Downtown Hotel
June 14-15, 2023

Aries
systems.



EMUG 2023

Editor Decision Support

Caroline Webber

Senior Product Manager

cwebber@ariessys.com

Lauren Oppenheim

Product Manager

loppenheim@ariessys.com

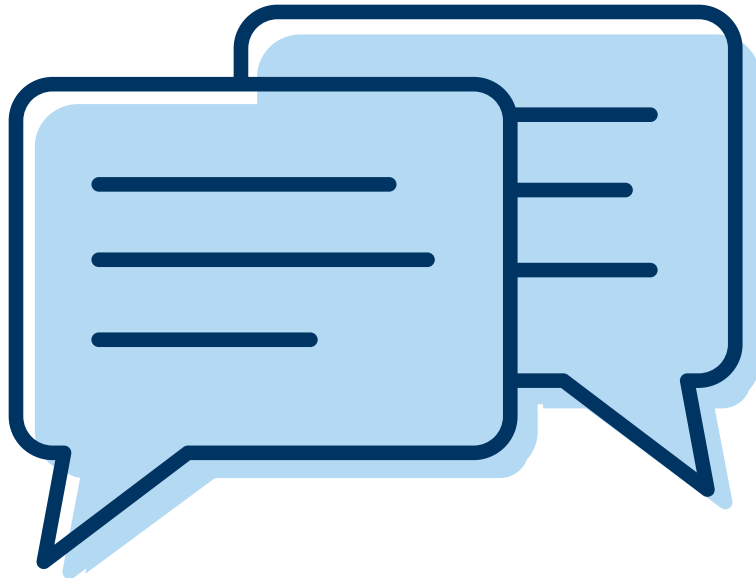
Agenda

#EMUG2023

- Discussion Forums
- Custom Editor Forms
- Early Decision
- One-way Cross-Publication Submission Transfer
- Decision Letter Customization Shortcuts
- Resources
- Questions

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Discussion Forums


Collaborative Editorial Workflows

Discussion Forums

- Solicit informal opinions, feedback, or editorial consultation regarding a submission or all submissions from other Editors and Reviewers
- Supports collaborative editorial workflows and saves time
- Can be initiated at any point in the workflow and can run concurrently with peer review
- Multiple discussion topics can be created for a submission
- The invitation letter can contain a deep link that brings the Editor or Reviewer directly to the Discussion page
- Allows Editors to pose questions and post comments without delaying the editorial process
- Helpful in cases of show-stopper issue



Discussion Forum - Initiation

Action	Manuscript Number	Article Type	Section Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status
View Submission Duplicate Submission Check (61%) Details Initiate Discussion History Submit Early Decision Technical Check View QC Results File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Send E-mail Linked Submissions Search Publons Reviewer Finder	DEMOAW.2018.0030	Original Study	Clinical Section	Diabetes Mellitus - EEMUG Demo Duplicate	Doctor Worm 	Dec 12, 2018	Dec 12, 2018	Manuscript Submitted

Manual initiation: Editor (with role permission) clicks the 'Initiate Discussion' action link



Discussion Forum - Initiation

If more than one Topic Template has been created, the Editor/Admin can either choose from the drop-down template list, or (if configured) the Editor/Admin can type in a Topic and Initial Comment

**Initiate Discussion for Manuscript Number: DEMOAW.2018.0030
Doctor Worm
"Diabetes Mellitus - EEMUG Demo Duplicate"**

Choose Topic Template: Please Choose
Please Choose
Master Topic Template
Pre Decision and Draft Decision Letter Discussion
Special Issue Discussion Topic Template

Editor Candidates

Insert Special Character Value Options

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

Clear Search Add

Cancel



Discussion Forum - Initiation

Initiate Discussion for Manuscript Number: DEMOAW.2018.0021
 Doctor Worm
 "Drinking Tea Makes You Happy and is Good for your Health!"

Topic	This submission - what do you think?
Initial Comments	I like this submission and think we should publish it, what do you think?

Editor Candidates

Search Again

Page: 1 of 1 (6 total candidates)

Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	View Reviews and Comments	Download Files(source and companion)	View Draft Decision Letter	# Classification Matches	Classification Matches	Available during next 30 days
<input checked="" type="checkbox"/>	Associate Editor	Alison Associate-Editor	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Editor (This editor is already assigned to the current submission)	Eddie Editor	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Managing Editor	Alison Admin	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Managing Editor	Anna Anna	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input type="checkbox"/>	Managing Editor (Possible author of the submission)	Amie Author	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0		Yes
<input checked="" type="checkbox"/>	Managing Editor	mary mary	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0		Yes

Page: 1 of 1 (6 total candidates)

Display 10 results per page.

Search Again

Cancel

Start Discussion without Sending Letters

Proceed To Customize Letters



Discussion Forum - Initiation

Discussion Participants - Confirm Selections and Customize Letters

You have selected the following people to participate in this discussion. To change the letter sent, 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.

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.

If there is a person in the list whom you do not want to participate in this discussion, check the Do Not Ask Editor to Participate box next to that person's name. When you click Send All Letters, that person will not be asked to participate in this discussion.

Editor Candidates

Name	Letter		Do Not Ask Editor To Participate
Alison Associate-Editor (Associate Editor)	Discussion Forum Invitation ▼	Customize	<input type="checkbox"/>
Eddie Editor (Editor)	Discussion Forum Invitation ▼	Customize	<input type="checkbox"/>
mary mary (Managing Editor)	Discussion Forum Invitation ▼	Customize	<input type="checkbox"/>

Cancel

Confirm Selections and Send Letters



Discussion Forum - Initiation

Discussion Participants - Confirm Selections and Customize Letters

Discussion Participants Confirmation

An E-mail has been sent to the following Editors asking them to participate in the discussion:

Alison Associate-Editor (Associate Editor)
Eddie Editor (Editor)
mary mary (Managing Editor)

Editor Candidates

Name

Alison Associate-Editor (Associate Editor)

Eddie Editor (Editor)

mary mary (Managing Editor)

Close

Set Flag

Discussion Forum Invitation

Customize

Cancel

Confirm Selections and Send Letters



Discussion Forum - Participation

Discussion for Manuscript Number: DEMOAW.2018.0021
Doctor Worm
"Drinking Tea Makes You Happy and is Good for your Health!"

[Participant Summary](#)
[View Submission](#)
[View Reviews and Comments](#)
[File Inventory](#)
[Add/Edit Submission Flags](#)
[Details](#)

Topic:
 This submission - what do you think?

Comments:

Participant	Comments	Date
mary mary	• I agree!	Dec 05, 2018
Eddie Editor	• I like this submission and think it would be good in our Special Issue	Dec 05, 2018
Anna Anna	I like this submission and think we should publish it, what do you think?	Dec 05, 2018

Editor Participants

Editor Participant	Role	# Posts	Latest Post	Participant Status	View Reviews and Comments	Download Files	View Draft Decision Letter	
Anna Anna	Managing Editor	1	Dec 05, 2018	Active	✓	✓	✓	Send E-mail
Alison Associate-Editor	Associate Editor	0		Active	☑	☑	☐	Send E-mail
Eddie Editor	Editor	1	Dec 05, 2018	Active	☑	☑	☐	Send E-mail
mary mary	Managing Editor	1	Dec 05, 2018	Active	☑	☑	☐	Send E-mail



Discussion Forum - Participation

Editor 'To-Do' List

My Pending Assignments (11)



New Assignments (3)



Submissions with Required Reviews Complete (2)



Submissions Requiring Additional Reviewers (3)

Submissions with One or More Late Reviews (0)

Submissions with Active Discussions (5) **1**

Reviews in Progress (0)

Reviewers Invited - No Response (0)

Submissions Under Review (0)

- Submissions with Active Discussions folder – shows the number of submissions with discussions in parentheses (5)
- An indicator showing the number of unread posts may be configured to display (in the blue circle)



Submissions with Active Discussions

- Editor clicks the 'Discussions' Action link
- Or, Editor clicks the hyperlinked topic in the "Topic" column

Submissions with Active Discussions

Page: 1 of 1 (5 total submissions) Results per page 100

Action	Manuscript Number	Article Type	Article Title	Corresponding Author	Topic	Date of Last Post	Date Discussion Started	Discussion Initiator	Editorial Status Date	Current Editorial Status
Discussions View Submission Details Go to Submission Send E-mail	ELSTRAINING2-D-22-00063	Full Length Article	MD Training Submission 110222-01	Jack Hill	Question	Dec 04, 2022	Dec 02, 2022	Serena Walker	Dec 02, 2022	With Editor
Discussions View Submission Details Go to Submission Send E-mail	ELSTRAINING2-D-22-00056	Full Length Article	CM Test Paper for Training June 2022	Jack Hill	This is a test topic for discussion test test	Dec 20, 2022 Dec 20, 2022	Sep 01, 2022 Dec 20, 2022	Serena Walker Serena Walker	Nov 28, 2022	Under Review



Submissions with Active Discussions

- If there are multiple topics, Editor clicks the 'View' link to view the individual topic

Discussions for Manuscript Number: ELSTRAINING2-D-22-00056
Jack Hill
"CM Test Paper for Training June 2022"

Action ▲	Topic ▲▼	Type ▲▼	Last Post Date ▲▼	Posted By ▲▼	Discussion Status ▲▼	Date Initiated ▲▼	Initiated By ▲▼	Ir
View	test test	Editor Consultation	Dec 20, 2022	Serena Walker	Open	Dec 20, 2022	Serena Walker	tr
View	This is a test topic for discussion	Editor Consultation	Dec 20, 2022	Serena Walker	Open	Sep 01, 2022	Serena Walker	tr

[Close](#) [Start New Topic](#)



Discussion Forum: Configuration

PolicyManager > Edit Letters:

- Add letter templates in the 'Discussion Forum' letter family to use for the Editor invitation letter (can also add a letter template to be used as a notification letter for new posts)
- Add letter templates to use for the Reviewer Invitation letter and notification letter
- Merge fields available:
 - %DISCUSSION_DEEP_LINK% - Hyperlinks directly to the Editor discussion
 - %INITIAL_DISCUSSION_POST% - Inserts the comments posted in the Initial Comments box for the discussion
 - %DISCUSSION_POST% - Inserts the most recent comments post from the discussion (useful in notification letter template)
 - %REVIEWER_DISCUSSION_DEEP_LINK% - Opens discussion popup window from Reviewer's 'Completed Assignments' folder



Discussion Forum: Configuration

PolicyManager > Discussion Forums > Configure Discussion Forum Settings:

- Custom Instructions can be added
- Deep Link Expirations can be set
- Discussion Indicators can be enabled

PolicyManager Main Menu

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

- [+ Registration and Login Policies](#)
- [+ Status Policies](#)
- [+ Submission Policies](#)
- [+ Questionnaire Policies](#)
- [+ Additional Data Policies](#)
- [+ Editor Assignment Policies](#)
- [+ Suggest Editor 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](#)

Configure Discussion Forum Settings

Custom Instructions

[Open Special Character Palette](#)

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

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

Deep Link Expirations

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 clicks

Expire link after days

Expire when discussion is concluded

Discussion Indicators

If the checkbox below is selected, discussion badges (e.g. **17**) are displayed to alert a user when new comments have been posted to discussions. Also, on the Discussion page, a blue dot is displayed at the beginning of each new comment to indicate at a glance which comments are new.

Display Discussion Indicators

Discussion Forum: Configuration

PolicyManager > Discussion Forums > Configure Discussion Topic Templates – Add Discussion Topic Template

- Tip: To force the Editor to choose a topic template from the list on 'Initiate Discussion' (rather than typing in a Topic and Initial comment) select the **Require** box

Add Discussion Topic Template

There are two types of discussions: Editor Consultation and Reviewer Consultation. The set of configuration options differs slightly for the two types. [\(more...\)](#)

Discussion Topic Template Type: Editor Consultation

Open Special Character Palette

Discussion Topic Template Name:

Configure Discussion Topic Templates

Listed below are the Discussion Topic Templates configured for your publication. To create a new template, click the 'Add' button. [\(more...\)](#)

Require editors to choose a Discussion Topic Template on the Initiate Discussion page for an Editor Consultation discussion. If this checkbox is not selected, users can either type in a Topic and Initial Comment, or select a Topic template to pre-populate the Topic and Initial Comments boxes.

Save Changes

Add

Order	Type	Description	Actions
<input type="text" value="1"/>	Editor Consultation	Master Topic Template	Edit (Master)
<input type="text" value="2"/>	Editor Consultation	Pre Decision and Draft Decision Letter Discussion	Remove Edit
<input type="text" value="3"/>	Editor Consultation	Special Issue Discussion Topic Template	Remove Edit

Update Order

Add

[Configure Discussion Forum Settings](#)

[Configure Automatic Discussion Initiation](#)

Topic name when initiating a discussion

Initial Comments when initiating a discussion

ments and companion) er

Submissions with Active Discussions folder and on Discussion

out that participants should see if they are not in the Editor Manager permission to 'View All Submissions' or 'Search All

configured for the Editor's Role

ing Editors to participate:

to send to Editors when comments are posted:

or only

participants



Discussion Forum: Configuration

RoleManager > Editor Role > Select the relevant permissions in the **Discussion Forums** section:

- Select 'View All Discussions'
- Select 'Initiate and Manage Discussions' along with the desired sub-setting:
 - 'My Discussions Only', or
 - 'All Discussions'

Discussion Forums

- View All Discussions
- Initiate and Manage Discussions
 - My Discussions Only
 - All Discussions



Discussion Forum: Configuration for Automation

PolicyManager > Configure Automatic Discussion Initiation

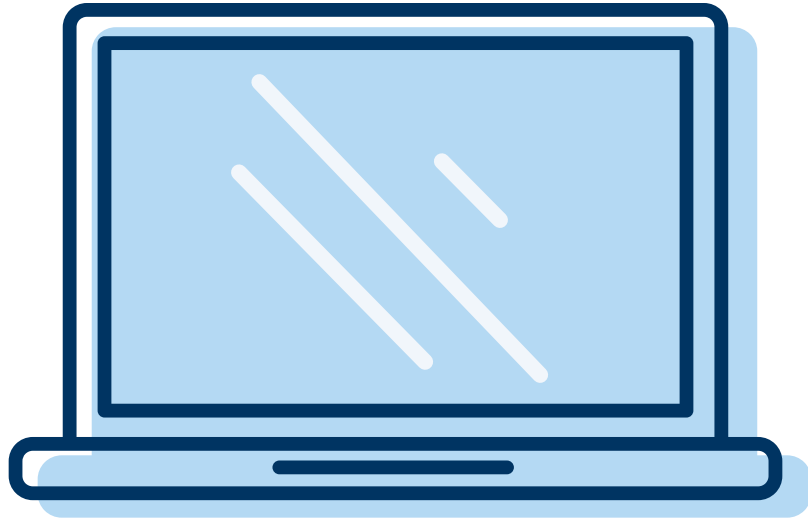
- Select the checkbox 'Initiate Editor Consultation Discussion Automatically' (for each Article Type)
- Select the Editor Roles to invite
- Select a Topic Template
- Can also initiate a Reviewer Consultation Discussion Automatically

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. [\(more...\)](#)

Article Type	Discussion Trigger	Editor Agrees to Assignment	First Editor Confirmed
Original Study		<input checked="" type="checkbox"/> Initiate Editor Consultation Discussion Automatically Editor Roles: Select All Clear All Associate Editor Brief Reports Editor Editor Edit TF Editor No TF Editor Consultation Topic Templates: Editor Topic Template #1	<input checked="" type="checkbox"/> Initiate Reviewer Consultation Discussion Automatically Reviewer Consultation Topic Templates: My Reviewer Consultation Template





Editor Forms

Submitting Editor Decisions




Customizing the Editor Decision Form

- Streamlines the decision-making process
- Specific to an Article Type and Editor role
- Sections (and their order) are configurable
- Provides the Editor with extensive information about the reviews
- Allows the Editor to answer standardized questions about the submission
- Content is available for merging into the decision letter:
 - Review questions and responses
 - Editor review questions and responses
 - Decision phrases



Editor Decision Form

- This is the first step in making a recommendation/decision
- Reached by clicking the 'Submit Editor's Decision and Comments' Action Link
- Can have a separate form for Editor recommendations and decisions, or use the same form for both

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name
View Submission Duplicate Submission Check (68%) Details  Initiate Discussion History File Inventory Edit Submission Classifications Assign Editor Invite Reviewers Solicit Commentary Set Final Disposition Submit Editor's Decision and Comments Send E-mail	DEMOAW.2018.0021	Original Study		Drinking Tea Makes You Happy and is Good for your Health!	Doctor Worm  



Editor Forms Instructions

The instructions shown to the Editor can be customized:

The screenshot displays the Editorial Manager interface for a manuscript. At the top, there is a navigation bar with the logo 'em', the site name 'Lauren's Test Site', and the user name 'Thor Kunkel'. Below the navigation bar is a red banner with an important message: 'Important Message: Site under development. Do not use for live manuscript submission.' The main content area shows the manuscript details for '17th April #1', 'Original Submission' by 'Thor Kunkel (Editor)'. A decision dropdown menu is set to 'Revise'. Below this are buttons for 'Cancel', 'Save & Submit Later', and 'Proof & Print'. A table lists the submission details, including the editor 'Thor Kunkel (Editor)' and the author 'George F. Babbitt (Author)'. A section titled 'Editor Decision Phrases' contains a list of phrases with checkboxes for selection. A blue box highlights the 'Decision: Revise' dropdown, and another blue box highlights the 'Editor Instructions' button. A red arrow points from the 'Editor Instructions' button to a pop-up window titled 'Editor Instructions'. The pop-up window contains the text: 'This is customizable instructions text for the editor completing the Editor Form at decision.' and has 'Close' and 'Print' buttons.



Editor Decision Phrases

Customized pre-configured text that can be populated into the decision letter using a merge field %EDITOR_DECISION_PHRASES%

Editor Decision Phrases available for inclusion in the Decision Letter are displayed below. Select the phrases you wish to include.

Select Phrase

- This is a good paper.
- The reviewers have reviewed your work and generally their reviews are positive. We are pleased to tell you we will accept your submission once the changes detailed by the reviewers and editors have been made.
- The reviewers have evaluated your paper and have recommended some changes.
- I am sorry to tell you that your submission has not been successful.
- Your submission to our journal has not been successful. The reason for this is....

Review Questions and Responses

Karen Little	Becky Reviewer	Numair Salmalin
--------------	----------------	-----------------



Editor Forms: Review Questions

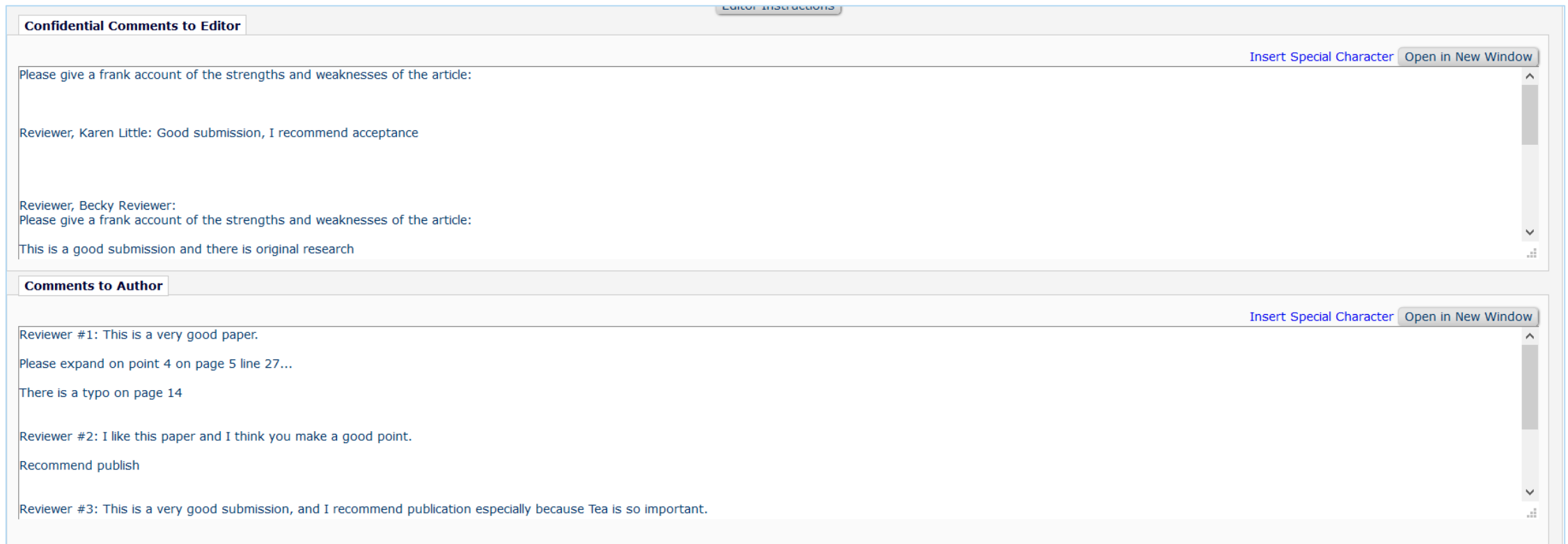
- Review Questions and Responses grid: Review questions and responses are automatically displayed and can be merged into decision letter
- Questions can be made individually selectable for merging into decision letter

Review Questions and Responses		
Karen Little Reviewer 1	Becky Reviewer Reviewer 2	Numair Salmalin Reviewer 3
Are you willing to review the revision of this manuscript?		
Yes	Yes	Yes
Will this paper be of interest to our readers?		
Yes	Yes	Yes
Please rate the research:		
Very Good	Very Good	Excellent
Would you recommend that we publish this manuscript?		
Yes	Yes	Yes



Editor Forms: Comments

Reviewers' comments can be automatically populated into the Comments boxes on the form



Confidential Comments to Editor

Please give a frank account of the strengths and weaknesses of the article:

Reviewer, Karen Little: Good submission, I recommend acceptance

Reviewer, Becky Reviewer:
Please give a frank account of the strengths and weaknesses of the article:
This is a good submission and there is original research

Comments to Author

Reviewer #1: This is a very good paper.
Please expand on point 4 on page 5 line 27...
There is a typo on page 14

Reviewer #2: I like this paper and I think you make a good point.
Recommend publish

Reviewer #3: This is a very good submission, and I recommend publication especially because Tea is so important.



Editor Forms: Comments

Or, Reviewer Comments to Author can be displayed separately and selected to go into the Decision letter

Comments to Author

Editor comments to author

[Insert Special Character](#) [Open in New Window](#)

Individual Reviewer Comments to Author (Editor's Copy)
Select comments for inclusion in the Decision Letter sent to the Author. * indicates a comment modified from the original.

Reggie Reviewer
Reviewer 1

Reviewer 1 Comments to Author
I like this paper and recommend acceptance after a few changes....

[Insert Special Character](#) [Open in New Window](#)

Rosie Reviewer
Reviewer 2

Reviewer 2 Comments to Author

[Insert Special Character](#) [Open in New Window](#)

Rapunzel Reviewer
Reviewer 3

Reviewer 3 - please see attached comments
original ideas, well presented
Please expand on conclusions

[Insert Special Character](#) [Open in New Window](#)



Reviewer Comments Configuration

- Reviewer comments can be either merged in or separated out
- For both options, the Reviewers' Comments to the Editor are in the 'Confidential Comments to Editor' box
- For Comments to Author configurations: PolicyManager > Reviewer and Editor Form Policies > Reviewer Recommendation Policies > Create/Edit Review Forms > Edit Form:
 - Under 'Display Comments to Author text box' select 'Keep separate from Editor Comments in Decision Chain'
- If using separate comments, the merge field to insert them into the decision letter is %INDIVIDUAL_REVIEWER_COMMENTS_TO_AUTHOR%



Decision Form: Editor Review Questions

Custom Editor Review Questions:

- Allows publications to collect specific information from their Editors as part of the peer review process during all revisions of a submission
- Can be added to multiple Editor/Review Forms
- Questions and responses can be populated into the decision letter

Editor Review Questions

When you select the checkbox next to the question, the question and answer can be merged into the decision letter.

This is a custom review question #1 (Limit 200 Characters) [\[Instructions\]](#)

Character Count: 0

List question [\[Instructions\]](#)

Please select a response

yes/no



Editor Decision Forms: Manuscript Ratings

Configurable questions with a 3, 5 or 10-point scale for responses

Manuscript Ratings

Question #1 - What is my overall opinion of this manuscript.


N/A 1 2 3 4 5 6 7 8 9 10

Question #2 - Should we invite this Author to submit in the future?

N/A 1 2 3 4 5 6 7 8 9 10




Editor Forms: Configuration

em |  Lauren's Test Site Lauren Oppenheim | Managing Editor

RoleManager ActionManager PolicyManager AdminManager Administration Help

☰ **Reviewer and Editor Form Policies**

- Custom Review Questions for Editors and Reviewers**
 - [Create/Edit Custom Review Questions](#)
- Manuscript Rating Question Configuration**
 - [Edit Manuscript Rating Questions](#)
 - [Overall Manuscript Rating Question Settings](#)
 - [Edit Manuscript Rating Instructions](#)
- Reviewer Recommendation Policies**
 - [Edit Reviewer Recommendation Terms](#)
 - [Create/Edit Review Forms](#)
 - [Match Review Forms to Article Types and Reviewer Roles](#)
 - [Set Pending Assignments Deep Link Expiration](#)
 - [Set Reviewer Recommendation Deep Link Expiration](#)
- Editor Decision Policies**
 - [Edit Editor Decision Terms](#)
 - [Configure Editor Decision Phrases](#)
 - [Create/Edit Editor Forms](#)
 - [Match Editor Forms to Article Types and Editor Roles](#)
 - [Editor Manuscript Rating Question Configuration](#)
 - [Configure Options for Review Rating](#)

em |  Lauren's Test Site Lauren Oppenheim | Managing Editor

RoleManager ActionManager PolicyManager AdminManager

Create Editor Forms

Default Editor Form	Edit
Alternative Editor Form	Remove Edit
Editor-in-Chief Editor Form	Remove Edit

[Add New Editor Form](#)

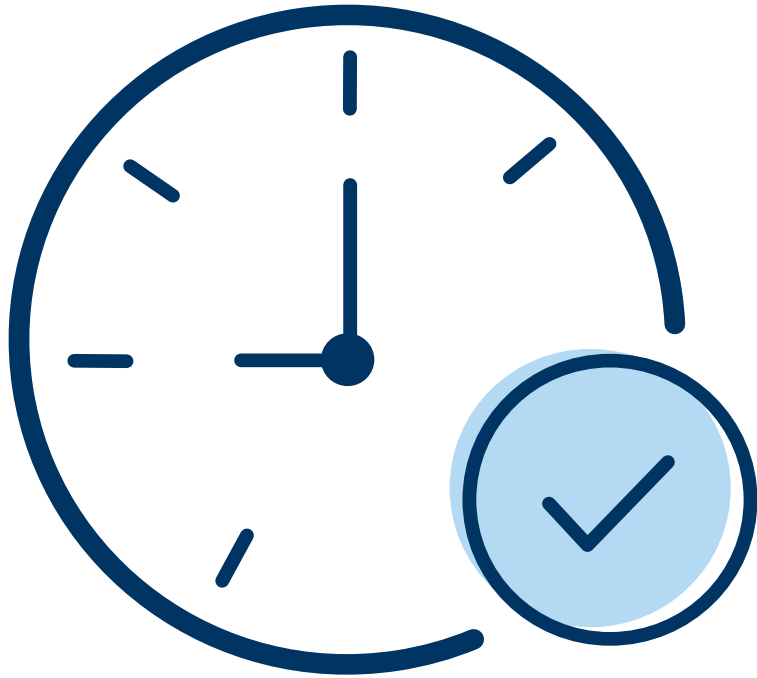
[Create/Edit Custom Review Questions](#)

[Configure Editor Decision Phrases](#)

[Match Editor Forms to Article Types and Editor Roles](#)

[Return to PolicyManager](#)





Early Decision

Upfront Desk Disposition

Early Decision

- Allows authorized Editors to submit a decision directly for new submissions, without assigning an Editor first:
 - Desk Reject decisions
 - Workflows with alternative uses for Revise decisions
 - Immediate decisions submitted on behalf of other Editors
- Expedites publication by bypassing Editor assignment/peer review workflow
- Personal time-saver: Decisions can be submitted with fewer clicks



Early Decision

em Lauren's Test Site

Home Main Menu Submit a Manuscript About Help Shortcuts

Important Message: Site under development. Do not use for live manuscript submission.

Quicklinks

New Submissions Requiring Assignment - Lauren Oppenheim

Batch Assign to Editor

Submit Early Decision - Google Chrome

Page: 1 of 1 (59) testweb.editorialmanager.com/laurendev170/SubmitEarlyDecisionNewSubmission.aspx?documentID=579&msid={13B1ADF6-2FE1-429C-9F31-5C168481CA4A}

Action

- View Submission Details
- Initiate Discussion
- History
- Submit Early Decision
- View Reference Checking Results
- File Inventory
- Edit Submission
- Send Back to Author
- Classifications
- Assign Editor
- Set Final Disposition
- Assign Editorial Task
- Initiate Production
- Linked Submissions

Submit Early Decision

Manuscript Number: LAURENDEV170-D-23-00016

"EDM-28992 docker test #1"

Please select an Editor to be associated with the early decision.

Assign to Me

All Editor Roles

Select Editor:

Decision:

- Please Select
- Please Select
- Accept
- Revise
- Reject
- Reject and Transfer

Editor Decision Phrases

Preview Selected Phrases

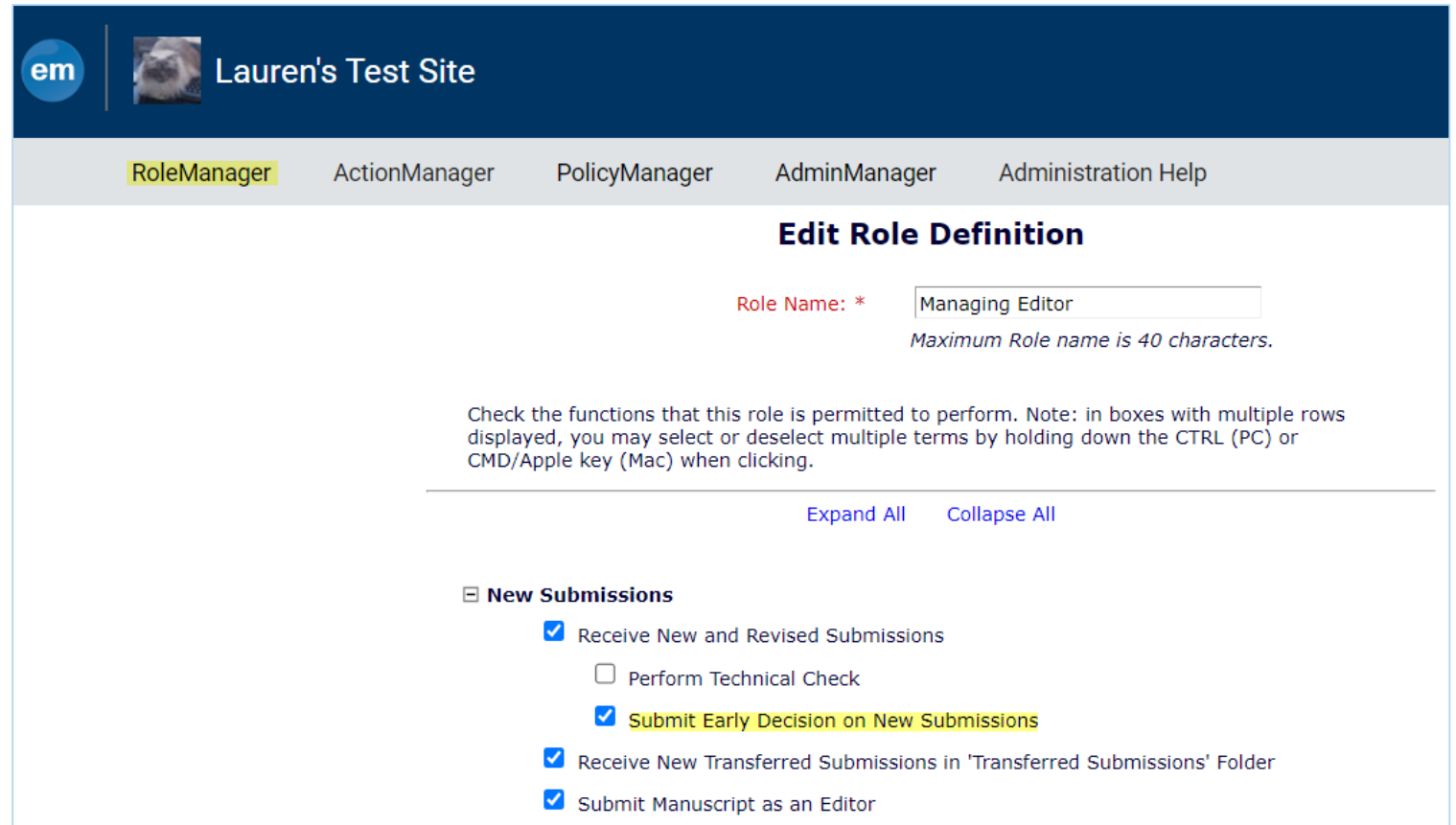
Editor Decision Phrases available for inclusion in the Decision Letter are displayed below. Select the phrases you wish to include.

- 'Submit Early Decision' Action link is shown in the following folders:
 - New Submissions
 - New Submissions Requiring Assignment
 - Direct-to-Editor New Submissions
 - Search Submissions – Search Results
- Can be configured for decision terms in any decision family



Early Decision: Configuration

- Staff Editor's role must be authorized to submit an Early Decision:
 - RoleManager: Select 'Submit Early Decision on New Submissions'
 - Parent permission, 'Receive New and Revised Submissions', must also be selected



em | Lauren's Test Site

RoleManager ActionManager PolicyManager AdminManager Administration Help

Edit Role Definition

Role Name: *
Maximum Role name is 40 characters.

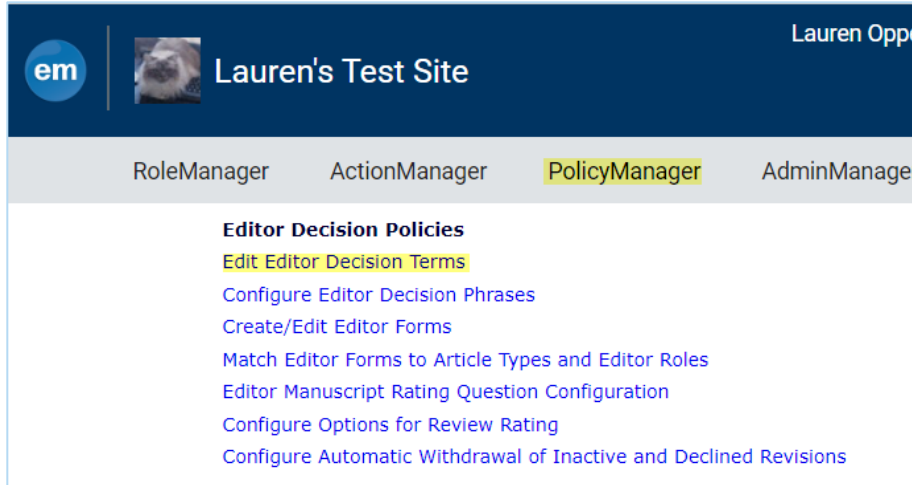
Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

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

New Submissions

- Receive New and Revised Submissions
 - Perform Technical Check
 - Submit Early Decision on New Submissions**
- Receive New Transferred Submissions in 'Transferred Submissions' Folder
- Submit Manuscript as an Editor

Early Decision: Configuration



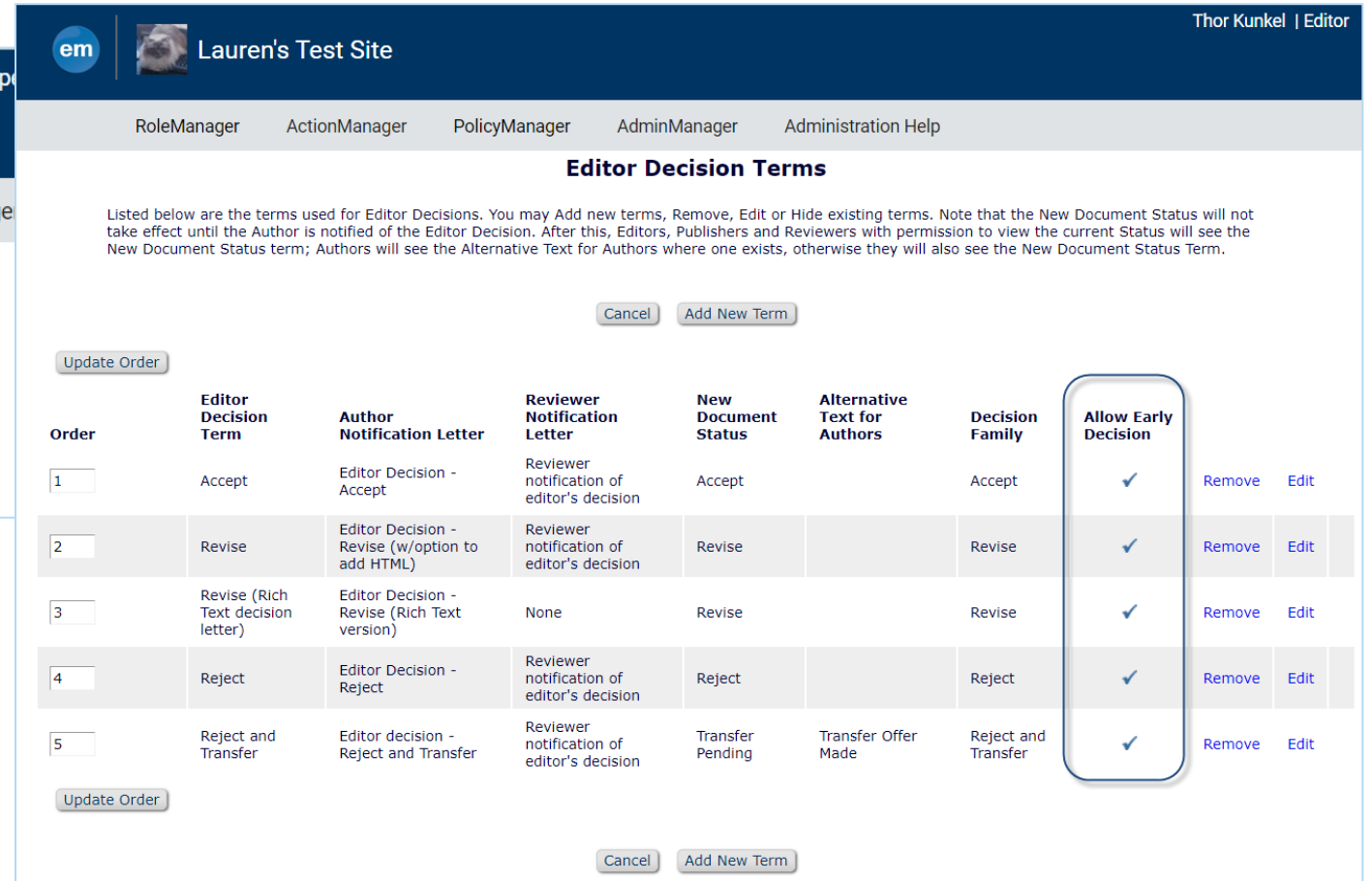
em Lauren's Test Site Lauren Opp

RoleManager ActionManager **PolicyManager** AdminManage

Editor Decision Policies
[Edit Editor Decision Terms](#)
[Configure Editor Decision Phrases](#)
[Create/Edit Editor Forms](#)
[Match Editor Forms to Article Types and Editor Roles](#)
[Editor Manuscript Rating Question Configuration](#)
[Configure Options for Review Rating](#)
[Configure Automatic Withdrawal of Inactive and Declined Revisions](#)

The decision term itself must also be configured for Early Decision:

PolicyManager > Edit Editor Decision Terms



em Lauren's Test Site Thor Kunkel | Editor

RoleManager ActionManager PolicyManager AdminManager Administration Help

Editor Decision Terms

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

Cancel Add New Term

Update Order

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Alternative Text for Authors	Decision Family	Allow Early Decision		
1	Accept	Editor Decision - Accept	Reviewer notification of editor's decision	Accept		Accept	✓	Remove	Edit
2	Revise	Editor Decision - Revise (w/option to add HTML)	Reviewer notification of editor's decision	Revise		Revise	✓	Remove	Edit
3	Revise (Rich Text decision letter)	Editor Decision - Revise (Rich Text version)	None	Revise		Revise	✓	Remove	Edit
4	Reject	Editor Decision - Reject	Reviewer notification of editor's decision	Reject		Reject	✓	Remove	Edit
5	Reject and Transfer	Editor decision - Reject and Transfer	Reviewer notification of editor's decision	Transfer Pending	Transfer Offer Made	Reject and Transfer	✓	Remove	Edit

Update Order

Cancel Add New Term

Early Decision: Configuration

Editor Decision Terms >

Click Edit link to open Add/Edit Editor Decision Term page >

Select 'Allow Early Decision' checkbox

Editor Decision Terms

Listed below are the terms used for Editor Decisions. You may Add new terms, Remove, Edit or Hide existing terms. When you select **Allow Early Decision**, the Editor Decision Term will be available on the Submit Early Decision page. After this, Editors, Publishers and Reviewers with permission to edit Document Status term; Authors will see the Alternative Text for Authors where one exists, otherwise they will not see it.

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

[Update Order](#)

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Alternative Text for Authors	Decision Family	Allow Early Decision	
1	Accept	Editor Decision - Accept	Reviewer notification of editor's decision	Accept		Accept	<input checked="" type="checkbox"/>	Remove Edit

Reviewer Notification Letter:

Document Status:

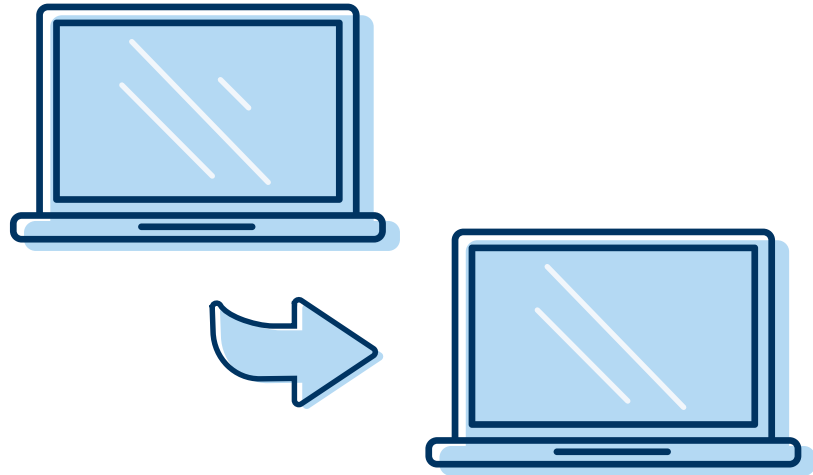
Decision Family:

Allow Early Decision When you select **Allow Early Decision**, the Editor Decision Term will be available on the Submit Early Decision page.

(hidden) When you **Hide** an Editor Decision Term, the term will no longer be available to Editors making a decision on new or revised manuscripts. Decisions that already use this term *will* appear in historical reports.

[Cancel](#) [Submit](#)





One-Way Cross-Publication Transfer

'Micromanage' Submission Transfers

One-Way Cross-Publication Transfer

- Allows publishers to set up submission transfer relationships whereby:
 1. Journal A can transfer submissions to Journal B, but cannot receive transferred submissions from Journal B
 2. Journal A can receive submissions from Journal B, but cannot transfer to Journal B
- Publication portfolios can restrict smaller or lower-profile journals from transferring submissions 'up' to higher-profile journals
- Multiple decision terms in the Reject and Transfer family can be configured, and reserved for specific transfer target publication
- Specific journals can be either presented or concealed as target publications if a particular decision term in the Reject and Transfer family is selected



One-Way Cross-Publication Transfer

One or more candidate transfer target publications can be proposed to the Author when a decision in the Reject and Transfer family is submitted...

The screenshot displays the EM system interface for 'Lauren's Test Site'. The user 'Thor Kunkel' is logged in. A red banner indicates the site is under development. The main content area shows the 'Editor Decision and Comments for Manuscript Number LAURENDEV170-D-22-00006'. The decision dropdown menu is open, showing options: 'Reject and Transfer' (highlighted), 'No Decision', 'Accept', 'Revise', and 'Reject'. A blue arrow points from the 'Reject and Transfer' option to a modal window titled 'Select Transfer Target Publications'. The modal window contains a list of publications to be presented to the Author as transfer targets:

Publication	Target Type
<input type="checkbox"/> Caroline's test site v17.0	EM Website
<input type="checkbox"/> Lauren's test site v16.1	EM Website
<input type="checkbox"/> Sally's test site v16.1	EM Website
<input type="checkbox"/> Sams test site v17.0	EM Website
<input type="checkbox"/> Test Sitea	EM Website
<input type="checkbox"/> Another non-EM target publication	Non-EM Publication Website
<input type="checkbox"/> Lauren's non-EM target publication	Non-EM Publication Website



One-Way Cross-Publication Transfer

The screenshot shows a web interface for setting the final disposition of a manuscript. At the top, there is a navigation bar with 'em' logo, 'Lauren's Test Site', and user 'Thor Ku'. Below the navigation bar is a red banner with the message: 'Important Message: Site under development. Do not use for live manuscript submission.' The main content area is titled 'Set Final Disposition' for 'Manuscript Number: LAURENDEV170-D-23-00001' and 'EDM-27881 QE docker test #1'. There are two paragraphs of explanatory text. Below the text is a 'Final Disposition:' dropdown menu with options: 'Accept', 'Reject', 'Transfer' (highlighted), and 'Withdrawn'. A 'Cancel' button is also visible.

...or a transfer target publication can be selected when a Final Disposition of Transfer is set

This screenshot shows the recipient selection dropdown menu that appears after selecting 'Transfer' as the final disposition. The menu is titled 'Please select a recipient:' and lists several options. The option 'LAURENDEV161 - Lauren's test site v16.1' is highlighted in blue. Other options include 'CAROLINEDEV170 - Caroline's test site v17.0', 'NICKDEV170 - Test Sitea', 'SALLYDEV161 - Sally's test site v16.1', 'SAMDEV170 - Sams test site v17.0', and 'Lauren's non-EM target publication'. The menu is divided into sections: '--Other EM Publications--' and '--Non-EM Publication--'.



One-Way Cross-Publication Transfer: Configuration

AdminManager > Configure Cross-Publication Submission Transfer >

Enable One-Way Submission Transfer:

Configure Transfer Target Publications

[Enable One-Way Submission Transfer](#)

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

Other Editorial Manager Publications:

Publication	Current Status	
CAROLINEDEV170	Confirmed – bidirectional	Remove
JACKEDEV170	Receive from only	Remove
LAURENDEV161	Confirmed – bidirectional	Remove
NICKDEV170	Confirmed – bidirectional	Remove
SALLYDEV161	Confirmed – bidirectional	Remove
SAMDEV170	Transfer to only	Remove

Other Editorial Manager Publication (enter publication code)

[Add](#)

Enable One-Way Submission Transfer

Reciprocally confirmed target publications are listed below. Select the checkbox to suppress submission transfers from this publication to a target publication. If the box is checked, that target publication will not be available for selection on the Editor's 'Select Transfer Target Publications' page' or included in the list of recipients on the 'Set Final Disposition' page.

Confirmed Target Publication:

Suppress Transfers to this Publication:

- Other EM Publications -

CAROLINEDEV170	<input type="checkbox"/>
JACKEDEV170	<input checked="" type="checkbox"/>
NICKDEV170	<input type="checkbox"/>
SAMDEV170	<input type="checkbox"/>

- Non-EM Publications -

Lauren's non-EM target publication	<input type="checkbox"/>
Another non-EM target publication	<input type="checkbox"/>

[Cancel](#) [Submit](#)



One-Way Cross-Publication Transfer: Configuration

em Lauren's Test Site Lauren C

RoleManager ActionManager **PolicyManager** AdminMan

Editor Decision Policies
Edit Editor Decision Terms
Configure Editor Decision Phra
Create/Edit Editor Forms

Certain decision terms in the Reject and Transfer family can also be restricted to specific target publications:

PolicyManager > Edit Editor Decision Terms > Click Edit link

Editor Decision Terms

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

Cancel Add New Term

Update Order

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Alternative Text for Authors	Decision Family	Allow Early Decision		
1	Accept	Editor Decision - Accept	Reviewer notification of editor's decision	Accept		Accept	✓	Remove	Edit
2	Revise	Editor Decision - Revise (w/option to add HTML)	Reviewer notification of editor's decision	Revise		Revise	✓	Remove	Edit
3	Reject	Editor Decision - Reject	Reviewer notification of editor's decision	Reject		Reject	✓	Remove	Edit
4	Reject and Transfer	Editor decision - Reject and Transfer	Reviewer notification of editor's decision	Transfer Pending	Transfer Offer Made	Reject and Transfer	✓	Remove	Edit

Update Order

Cancel Add New Term



One-Way Cross-Publication Transfer: Configuration

Add/Edit Editor Decision Term

The Author Notification letter is a letter in the 'Decision' family that notifies the Author of the Editor's decision. You may select one default and multiple optional letters for each Decision Term. If more than one letter is selected, the Editor may choose from these letters at the time of Author Notification

(hidden) When you **Hide** an Editor Decision Term, the term will no longer be available to Editors making a decision on new or revised manuscripts. Decisions that already use this term *will* appear in historical reports.

Associate Decision Term with Transfer Target Publications:

If Cross-Publication Submission Transfer is enabled for this publication, you may restrict submission transfers to specific publications when this Decision Term is selected. Only the target publications selected below will be presented to the Editor when this Decision Term is selected, or populated into the Author decision letter.

All target publications ▲

CAROLINEDEV170

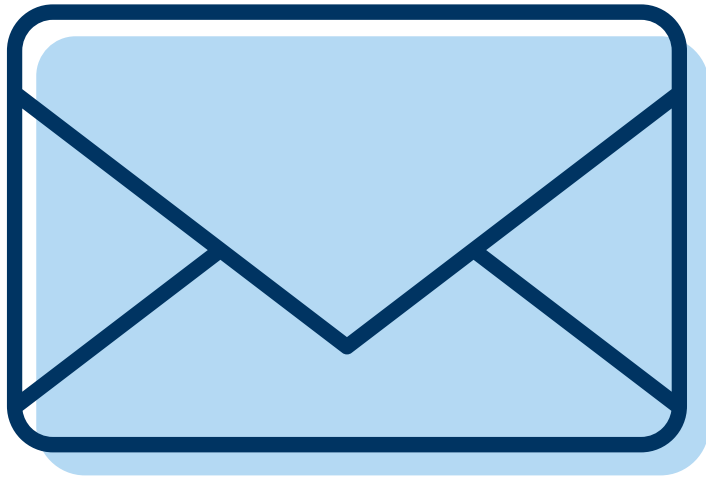
LAURENDEV161

NICKDEV170

SALLYDEV161

SAMDEV170 ▼





Decision Letter Customization


Shortcuts for Drafting Author Decisions




Editor Decision Phrases


Time-saver for high-volume publications!

- Allows Editors to auto-populate text into the decision letter
- No need to copy and paste verbiage for each decision
- Retains consistent language across a larger Editor staff
- Populated directly into letter preview and can be edited prior to sending
- Can be configured by Article Type or Editor role
- Allows Editors who cannot access the decision letter to select decision phrases for inclusion in the letter

Your Submission - [EMID:7cc492294fd73c40]

 emdev.laurendev170.18.8561a4.c62e088f@editorialmanager.com on behalf of Thor Kunkel <em@editc
To Lauren Oppenheim

  Reply  Reply All

 We removed extra line breaks from this message.

*** External email: use caution ***

Ref.: Ms. No. LAURENDEV161-D-19-00196
Checking Prod Status Grid status messaging #4 Lauren's Test Site

Dear Travers,

I am pleased to tell you that your submission was accepted for publication in Lauren's Test Site on 05 May 2023.

Please be advised that our Editorial Office will be closed for the summer recess from July 15th through August 15th.

Thank you for submitting your work to this journal.

With kind regards

Thor Kunkel
Editor
Lauren's Test Site

In compliance with data protection regulations, you may request that we remove your personal registration details at any time. (Use the following URL: <https://testweb.editorialmanager.com/laurendev170/login.asp?a=r>). Please contact the publication office if you have any questions.



Editor Decision Phrases

The screenshot displays the 'Editor Decision and Comments for Manuscript Number LAURENDEV161-D-19-00196'. The main decision area shows 'Decision: Accept' and 'Overall Manuscript Rating (1-100): 0'. Under 'Editor Decision Phrases', a phrase is highlighted: 'Please be advised that our Editorial Office will be closed for the summer recess from July 15th through August 15th.' Below this are sections for 'Confidential Comments to Editor' and 'Comments to Author'. A separate window at the bottom shows the 'Editor Decision Phrases' selection screen with three options: the highlighted phrase (checked), a default text phrase (unchecked), and an appreciation phrase (unchecked). A blue arrow points from the selection screen to the main decision area.

Editor forms can be configured to list decision phrases based on Article Type or Editor role



Editor Decision Phrases: Configuration

PolicyManager > Configure Editor Decision Phrases > Add Editor Decision Phrase

The screenshot shows a web application interface for configuring editor decision phrases. At the top, there is a navigation bar with the user's name 'Thor Kunkel | Editor' and a site name 'Lauren's Test Site'. Below this is a menu with options: RoleManager, ActionManager, PolicyManager (highlighted), AdminManager, and Administration Help. The main content area is titled 'Configure Editor Decision Phrases' and contains a list of current phrases. A modal window titled 'Edit Editor Decision Phrase Details' is open, showing a text editor for editing a phrase. The phrase being edited is 'Please be advised that our Editorial Office will be closed for the summer recess from July 15th through August 15th.' The modal also includes icons for save, delete, and back, and a link to 'Insert Special Characters'.

em Lauren's Test Site Thor Kunkel | Editor

RoleManager ActionManager **PolicyManager** AdminManager Administration Help

Configure Editor Decision Phrases

Listed below are the Editor Decision Phrases which, when associated with an Editor Form, can be selected by an Editor when submitting a decision and added to the Decision Letter. To edit a phrase use the Edit icon. A phrase may be removed at any time using the Discard icon. To add a new phrase, click 'Add Editor Decision Phrase'.

Current Editor Decision Phrase List + Add Editor Decision Phrase

...	✎	🗑	Here's some text populated by an Editor Decision Phrase. This text can be auto-populated into the decision letter if the editor selects this Decision Phrase on the Editor Form shown at decision.
...	✎	🗑	Please be advised that our Editorial Office will be closed for the summer recess from July 15th through August 15th.

+ Add Editor Decision Phrase

Edit Editor Decision Phrase Details

Insert Special Characters

Editor Decision Phrase*

Please be advised that our Editorial Office will be closed for the summer recess from July 15th through August 15th.



Editor Decision Phrases: Configuration

- Decision letter must contain %EDITOR_DECISION_PHRASES% merge field
 - PolicyManager > Edit Letters > Add %EDITOR_DECISION_PHRASES% merge field to letters in Decision family (select System merge fields)
 - Editor role must be authorized in RoleManager to draft or send the decision letter

The screenshot displays a web application interface for editing a decision letter. The main area is titled "Letter Body:" and contains a text editor with the following content:

Dear %TITLE% %LAST_NAME%,
I am pleased to tell you that your submission was accepted for publication on %FINAL_EDITOR_DECISION_DATE%.
Comments from the Editor or Reviewers may be found below.
%READ_AND_PUBLISH_TO_AUTHOR%
%EDITOR_DECISION_PHRASES%
Thank you for submitting your work to this journal.
With kind regards
%EDITOR_NAME%
%EDITOR_ROLE%
%JOURNALFULLTITLE%

At the top right of the editor, there are links for "Insert Special Character" and "Insert Merge Field: Custom | System".

An "Insert System Merge Fields" dialog box is open in the foreground. It contains the following text and elements:

Insert System Merge Fields [Close]

You can drag and drop merge fields from here to the letter Subject or Body. (more...)

Search: editor_decision [X] Expand All | Collapse All

- + %EDITOR_DECISION% [X]
- + %EDITOR_DECISION_PHRASES% [X] Inserts 'Editor Decision Phrases' selected for the submission. Can only be (more...)
- + %FINAL_EDITOR_DECISION_DATE% [X]

At the bottom of the editor, there are "Cancel" and "Preview" buttons.



Custom Merge Fields

Leverage hundreds of standard system merge fields or create your own!

The screenshot shows a letter editor interface. The 'Letter Body' contains the following text:

Ref.: Ms. No. LAURENDEV170-D-23-00017
EDM-28992 docker test #2
Lauren's Test Site

Dear Mr. High Alert,

Reviewers have now commented on your paper. You will be prepared to undertake the revision suggested, we will be glad to assist you.

For your guidance, reviewers' comments are appended to the end of this letter.

If you decide to revise your manuscript, please submit a revision within the time frame indicated. If a revision is not raised, when you submit the revised version.

Your revision is due by %DATE_REVISION_DUE%.

To submit a revision, go to <https://testweb.editorialmanager.com> and click on the 'Revisions' link in the submission record under the 'Submission Needing Revision' status.

%CUSTOM_CALL_FOR_PAPERS%

Kind regards,

Lauren Oppenheim
Managing Editor
Lauren's Test Site

Reviewers' comments:

The 'Insert Custom Merge Field' dialog box is open, showing a search bar and a list of merge fields:

- %CUSTOM_BLAHBLAH%
- %CUSTOM_CALL_FOR_PAPERS%
- %CUSTOM_CONTAINS_KITTENS%
- %CUSTOM_CUSTOM_SCRAP_OF_TEXT_WITH_HTML%
- %CUSTOM_SCRAP_OF_TEXT%

- Saves Editors time by inserting boilerplate text into letter for context
- Can be either added when the letter is sent or stored as part of the letter template
- Custom merge field text is *not* populated in the letter preview and *cannot* be edited prior to sending
- Custom merge field definitions can be saved as a 'container' that is periodically updated with announcements/seasonal information
- Stored custom merge field content can also be temporarily removed, so no need to manually edit/remove



Custom Merge Fields

Your Submission - [EMID:54aff82f6a2f1ae6] - Message (Plain...)

File Message Help

Delete Archive Reply Reply All Forward Share to Teams

Team Email Done Reply & Delete

Move Assign Policy Categorize Follow Up

Mark Unread

Immersive Reader

Translate

Zoom

Reply with Scheduling Poll

Viva Insights

Your Submission - [EMID:54aff82f6a2f1ae6]

emdev.laurendev170.0.8571f3.e6e2e306@editorialmanager.com on behalf of Lauren's Test Journal <em@editc...>
To: Lauren Oppenheim

Ref.: Ms. No. LAURENDEV170-D-23-00022
Coco's ECR testje, 2 March 2023
Lauren's Test Site

Dear Miss Mortenson,

Reviewers have now commented on your paper. You will see that they are advising that you revise the manuscript. If you are prepared to undertake the revision suggested, we would be pleased to reconsider your paper for publication.

For your guidance, reviewers' comments are appended below.

If you decide to revise your manuscript, please submit a list of changes, or a rebuttal against each point the reviewers have raised, when you submit the revised version.

Your revision is due by .

To submit a revision, go to <https://testweb.editorialmanager.com/laurendev170/> and log in as an Author. You will find your submission record under the 'Submission Needing Revision' section on your homepage.

We are currently accepting papers for a special issue on autumn foliage in New England. Please contact the Editorial Office (fallfoliage@mallinator.com) if you are interested in submitting a paper.

Kind regards,

Lauren Oppenheim
Managing Editor
Lauren's Test Site

Reviewers' comments:

In compliance with data protection regulations, you may request that we remove your personal registration details at any time. (Use the following URL: <https://testweb.editorialmanager.com/laurendev170/login.asp?a=r>). Please contact the publication office if you have any questions.

- Custom merge field added during decision process populates text into decision letter
- Not specific to letters in the Decision family: can be used for all letter families



Custom Merge Fields: Configuration

PolicyManager >
Define Custom Merge Fields

em | Lauren's Test Site | Lauren Oppenheim | Managing Editor

RoleManager ActionManager **PolicyManager** AdminManager Administration Help

Define Custom Merge Fields

These custom merge fields enable your publication to define standardized text that can be added to letters sent from your publication, such as signatures, marketing messages, announcements, and legal disclaimers. [\(more...\)](#)

[Add New Field](#)

[Sort In Alphabetical Order](#) [Edit Image Files for Letters](#)

Custom Merge Fields	Actions
% CUSTOM_CALL_FOR_PAPERS%	View Content Edit Definition Edit Letter Templates Copy
% CUSTOM_SCRAP_OF_TEXT%	View Content Edit Definition Edit Letter Templates Copy
% CUSTOM_CUSTOM_SCRAP_OF_TEXT_WITH_HTML%	View Content Edit Definition Edit Letter Templates Copy
% CUSTOM_CONTAINS_KITTENS%	View Content Edit Definition Edit Letter Templates Copy
% CUSTOM_BLAHBLAH%	View Content Edit Definition Edit Letter Templates Copy

[Sort In Alphabetical Order](#) [Edit Image Files for Letters](#)

[Add New Field](#)

Edit Custom Merge Field

To define a custom merge field, enter a name for it and define the content. When you submit your definition, the system appends a prefix and suffix to the name you entered. When a letter that contains a custom merge field name is sent, the content is merged into the letter. [\(more...\)](#)

[Cancel](#) [Submit](#)

Name:

Maximum 256 alphanumeric characters and underscores allowed, no spaces

Content: [Insert Image](#) [Insert Special Character](#)

We are currently accepting papers for a special issue on autumn foliage in New England. Please contact the Editorial Office (fallfoliage@mailinator.com) if you are interested in submitting a paper.

[Preview in HTML Format](#)

[Cancel](#) [Submit](#)



Additional Resources

Video Library

Browse helpful videos on Editorial Manager and ProduXion Manager

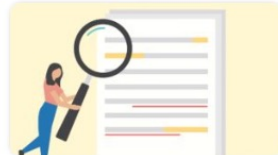
Recent Releases



LiXuid Manuscript: Direct Content Editing



LiXuid Manuscript: A Limitless Production Experience



Submitting Reviews in Editorial Manager

Search:

Filter by:

RESET FILTERS



Adding Custom Questions to Editor Forms

SUMMARY ▾



Customizing Editor Displays to Optimize the Editor Experience



Manuscript Prioritization with Editor Signposting

SUMMARY ▾

em Lauren's Test Site

Home Main Menu Submit a Manuscript About ▾ Help ▾ Shortcuts ▾

Important Message: Site under development. Do not use for live manuscript submission

System Help

Video Tutorials

em Editorial Manager®

HELP

For full **System Help** contents, click the menu icon at the top of the window

For help by user role, click one of these buttons:

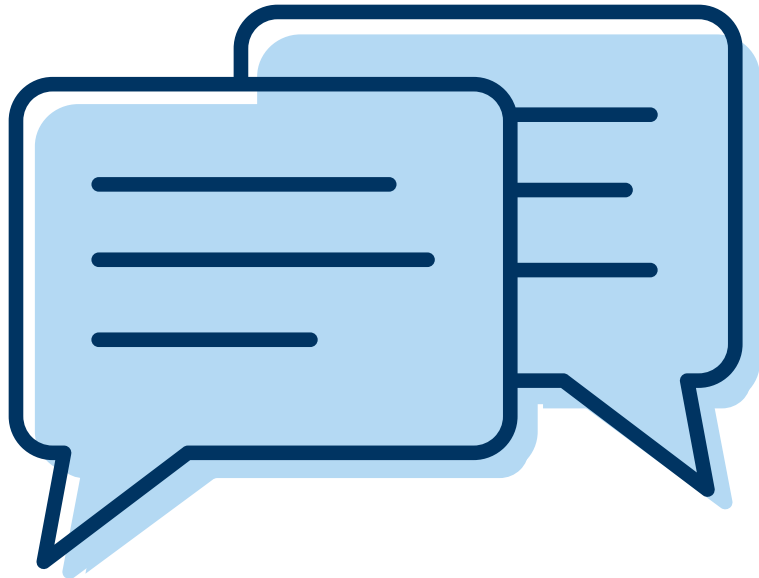
Author Reviewer Editor Publisher

[Minimum system requirements and browser requirements](#)

Was this article helpful?

What's new?





Questions?

Thank you!

Stay Connected

Caroline Webber
Senior Product Manager
cwebber@ariessys.com

Lauren Oppenheim
Product Manager
lOppenheim@ariessys.com

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50 High Street, Suite 21
North Andover, MA 01845 USA

www.ariessys.com

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