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EMUG 2023



Courtyard Boston Downtown Hotel
June 14-15, 2023

Aries
systems.



EMUG 2023

Supporting Authors II

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Technical Product Manager

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Product Manager

Bfitzhenry-neale@ariessys.com

Agenda

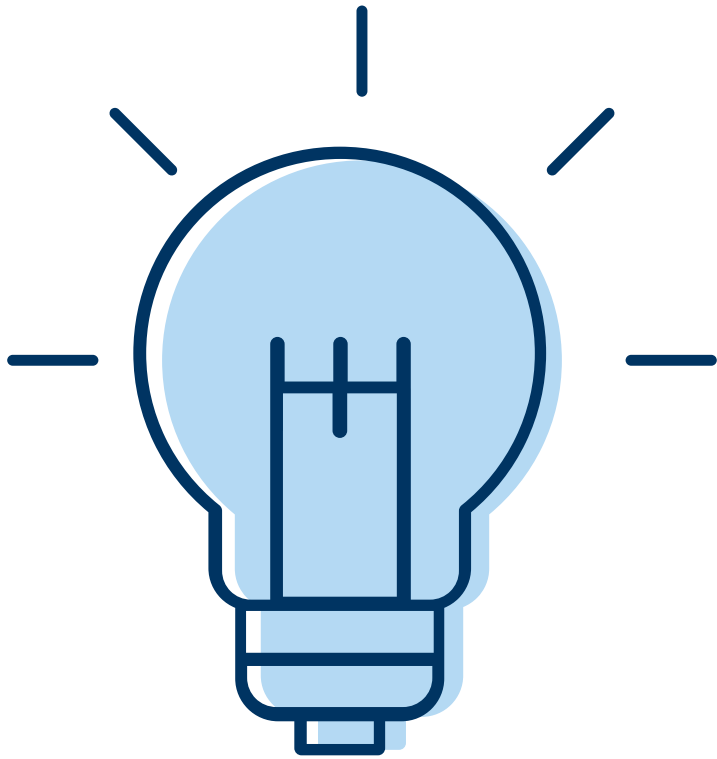
Welcome to Day 2

#EMUG2023

- Introduction to the Aries Ecosystem
- Writing Services
- Reference Formatting
- Conflict of Interest Disclosures
- Mobile Manuscript Status Check
- Data Repositories
- Resources
- Questions from Attendees

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The Aries Ecosystem

The Aries Ecosystem: Integrated Solutions

- Connects users with best-in-class tools and services, all in one place and directly within workflow
- Comprised of both Aries and third-party technology that plug into EM/PM
- Enables publishers to address new initiatives and workflow/quality gaps without additional investment
- Continuously evolving to meet needs of the industry

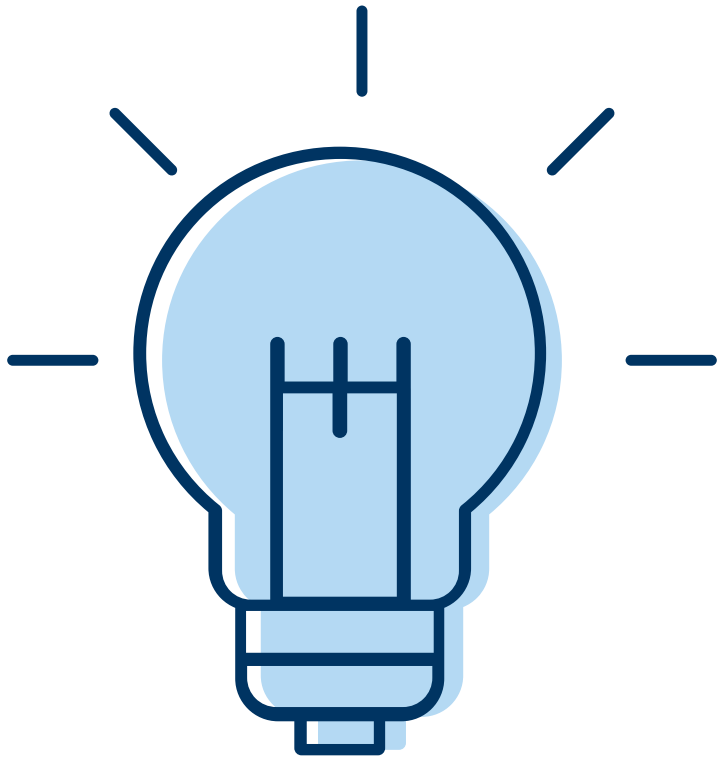


The Aries Ecosystem: Supporting Authors

Many tools and services within the Aries ecosystem support Authors and their workflows!

- More tools are covered in the Supporting Authors I session from Day 1!
- Visit the Aries website to explore tools available across all branches of the Aries ecosystem and discover helpful resources for each tool





Writing Services

Paperpal Preflight

Writing & Language Challenges

- Hundreds of thousands of hours spent drafting manuscripts and proposals for publication each year
- Authors risk desk rejection if quality of manuscript/writing is poor
- 1 in 3 manuscripts are returned to Authors due to technical issues
- 87% of editorial offices perform technical/language checks manually
- 56% of manuscripts are checked two/three times before acceptance
- Authors and Editors experience delays to publication due to manual checks or additional revisions



Source: <https://paperpal.com/preflight>

Paperpal Preflight

- AI-powered language and technical writing check tool
- Identifies complex writing errors and provides subject-specific language suggestions in real-time *prior* to manuscript submission
- Configurable: Technical check against journal's custom requirements
- Author can apply suggested corrections and continue with submission in EM



Accelerates Writing & Submission

Improves Research Quality

Increases Likelihood of Acceptance

Saves Editors Valuable Time



Writing Evaluation & Suggestions

Evaluation

Upload your manuscript and preview a detailed summary of your paper's performance against these standard journal requirements to avoid desk rejection

Language

- Inclusive Language
- Plain Language Summary
- Grammar
- Mechanics and Style
- Readability
- Vocabulary

References

- Age of References
- No Citations in Abstract
- Number of References
- Reference Citations
- Use of Self-citation

Structure

- Manuscript Structure
- Structured Abstract

Counts

- Abstract Length
- Manuscript Length
- Title Length
- Use of Brand Names
- Use of Copyrighted Methods

Figures and tables

- Figure and Table Citations
- Figure Legends
- Table Legends

Disclosures

- Author Contributions Statement
- Conflict of Interest Statement
- Data Access Statement
- Ethics Statement
- Funding Statement

Metadata

- Corresponding Author Address
- List of Contributing Authors
- List of Keywords
- Word Count

- Paper structure and evaluation uses the rules configured with the publisher's PaperPal account

Your Paperpal-edited Manuscript

John Paperpal, Jane Cactus

Corresponding Author: example@example.com

Abstract

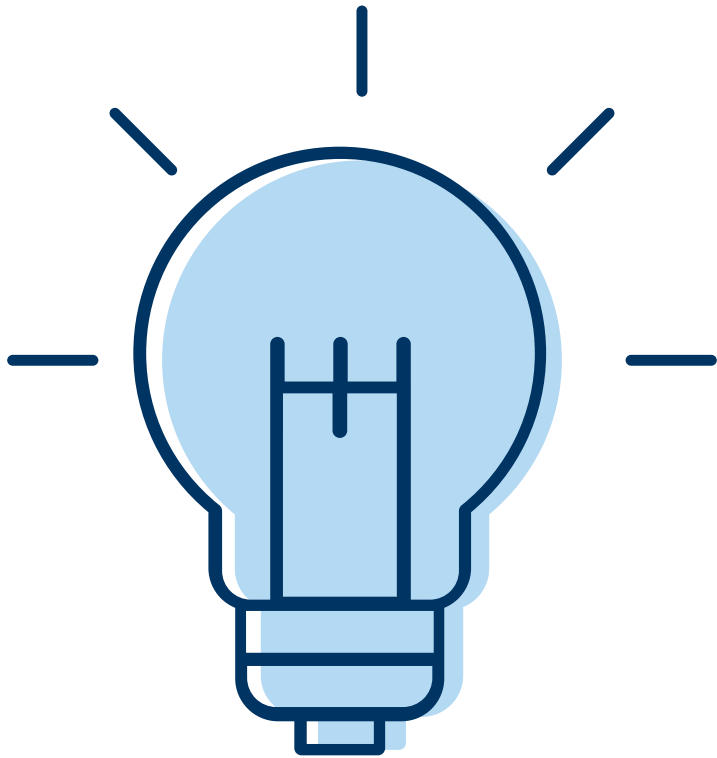
Estimation of learning curves is ubiquitously based on the proportion of correct responses within moving trial windows. ~~Thereby~~ **Therefore**, it is assumed that the learning performance ~~stays~~ **remains** constant within the moving windows, which may ~~often~~ not be the case. In the present study, we demonstrate that this assumption's violations lead to systematic errors in the analysis of learning curves, ~~and~~. We explore the dependency of these errors on window size, different statistical models, and the learning phase. ~~For reducing~~ **To reduce** these errors in the analysis of single subject data, we propose adequate statistical methods for the estimation of learning curves and construction of confidence intervals in a ~~trial by trial~~ **trial-by-trial** manner. Applied to data from an avoidance learning experiment with rodents, these methods revealed performance changes ~~happening~~ **occurring** at multiple time scales across training sessions. Our

Add a corresponding author's email address to let editors know how to get in touch with you.

Introductory commas separate the introductory part of a sentence from the main message, thus giving context for the message to come. An introductory comma is necessary here.

Compound words can be written in one of three ways – one word (mailbox), two words (ice cream), or hyphenated (mother-in-law).





Reference Check

Inera eXtyles

Reference Formatting & Validation

- Many Author revisions are related to reference errors and required corrections
- External composition vendors sometimes paid to fix references
- Expecting Authors to follow journal's specific reference style may be unrealistic and burdensome
- Expensive bottleneck that poses risks to quality and publication time



Automatic Reference Check

- Automatically formats and validates submitted bibliographic information
- Extracts unformatted bibliographic metadata and uses heuristics to analyze, peel apart, and restructure
 - No pre-formatting required!
- Validate references by tagging elements in structured XML and queried against external databases to make a match
 - Links to PubMed and Crossref



Streamlines Reference Technical Check

Improves Quality & Consistency

Saves Authors and Editors Time

Reduces Delays Upfront



Inera eXtypes Reference Linking

Action	Title	Date Submission Began	Status Date	Current Status
<ul style="list-style-type: none">View SubmissionEdit SubmissionApprove SubmissionRemove SubmissionView Reference Checking ResultsCorrespondenceSend E-mail	Reference Linking			
<p><jrn>1. Access of Medicaid recipients to outpatient care. <i>N Engl J Med.</i> 1994;330:1426-1430 doi:10.1056/NEJM199405193302007. Medline:8159198</jrn></p> <p><jrn>2. Alcohol-related traffic fatalities among youth and young adults: United States, 1982-1989. <i>MMWR Morb Mortal Wkly Rep.</i> 1991;40:178-179, 185-187. Medline:1900563</jrn></p> <p><jrn>3. Logan AG, Achber C, Milne BJ, Campbell WP, Haynes RB. Work-Site treatment of hypertension by specially trained nurses A controlled trial. <i>Lancet.</i> 1979;xxx:1175-1178 doi:10.1016/S0140-6736(79)92397-3. Medline:91901</jrn></p> <p><jrn>4. Banit DM, Kaufer H, Hartford JM. Intraoperative frozen section analysis in revision total joint arthroplasty. <i>Clin Orthop Relat Res.</i> 2002; (401):230-238 doi:10.1097/00003086-200208000-00026. Medline:12151900</jrn></p> <p><jrn>5. Banwell MG, Dupuche JR. <i>Chem Commun.</i> 1996;869 doi:10.1039/cc9960000869.</jrn></p> <p><jrn>6. Shen T-J, et al. <i>Protein Eng.</i> 1997;38:xxx.</jrn></p> <p><jrn>7. Curcio F, Pegoraro I, Dello Russo P, Falletti E, Perrella G, Cerialle A. SOD and GSH inhibit the high glucose-induced</p>				

eXtypes Reference Check

The reference has no authors. Please proof carefully. (in reference 1 "Access of Medicaid recipients to, 1994").

Missing content

This comment thread contains content that's not yet supported. Select it to view it in the Revisions pane.

eXtypes CrossRef Check

CrossRef reports the author should be "The Medicaid Access Study Group" not "" in the reference 1 "Access of Medicaid recipients to, 1994".

Missing content

This comment thread contains content that's not yet supported. Select it to view it in the Revisions pane.



Configuration

PolicyManager

- PolicyManager > ProduXion Manager > Configure Reference Checking

- [-] **ProduXion Manager**
 - Configure Artwork Quality Checking
 - Configure Automatic Production Initiation
 - Configure Automatic Copy of Target to Actual Publication Information
 - Configure Book Processing
 - Configure NIHMS Embargo Period Rules
 - Configure Submission Workflows and Production Tasks
 - Configure Schedule Group Production Tasks
 - Configure Task Manager Policies
 - Set Production Task Deep Link Expirations
 - Configure Identifiers Displayed in Production Tracking
 - Configure Production Statuses
 - Define National Holidays
 - Configure Automatic DOI Assignment
 - Configure Reference Checking**
 - Configure Attachment Security
 - Edit Instructions for Attachments
 - Set Attachments Deep Link Policy



Configuration: Select Methods

Configure Reference Checking (powered by eXtyle)

Configure one or more Reference Linking methods and the workflow points that will trigger Reference Checking. Add any instructions and text you would like to display on the results page. Submit this page, then click the 'Edit Submission Item Types' link to select at least one Submission Item for Reference Checking.

Select the method(s) for Reference Linking:

<input checked="" type="checkbox"/>	Use PubMed ID
<input checked="" type="checkbox"/>	Display error messages on results page
<input type="checkbox"/>	PubMed Automatic Reference Correction (Add missing data only)
<input checked="" type="checkbox"/>	PubMed Automatic Reference Correction (Add missing data and replace incorrect data)
<input checked="" type="checkbox"/>	Use CrossRef DOI
<input type="checkbox"/>	CrossRef Automatic Reference Correction (Add missing data only)
<input checked="" type="checkbox"/>	CrossRef Automatic Reference Correction (Add missing data and replace incorrect data)



Configuration: Workflow Triggers & Source Files

Select the workflow points that will trigger Reference Checking:

No Reference Checking	Reference Linking Only	Reference Cleanup and Linking	
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Original PDF Building by Author
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Original PDF Building by Editor
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	First Reviewer Invited/Assigned for Original Submission
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Revised PDF Building by Author
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Revised PDF Building by Editor
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Author Notified of Editor Decision in the 'Accept' Decision Family
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Author Notified of Editor Decision in the 'Revise' Decision Family
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Create Submission

<input checked="" type="radio"/>	Source file <u>can</u> be carried forward during Revision
<input type="checkbox"/>	Automatically replace original file with cleaned-up file.
<input type="radio"/>	Source file <u>cannot</u> be carried forward during Revision



Configuration: Customize User Instructions

- Customize the instructions displayed on the Reference Checking Results page for Authors, Editors, and Reviewers

Customize Instructions Displayed on the Reference Checking Results Page

To Authors:

Line Wrap: ▼

[Insert Special Character](#)

Reference checking is done for journal citations. If the journal citation has a PubMed or CrossRef link, it has been validated. If 'Not Checked' is displayed, either the citation could not be identified as a journal citation, or the linking service did not return results. If 'Not Validated' is displayed, the journal citation could not be validated on the linking service.

[View Default Instructions](#)

[Revert to Default Instructions](#)



Configuration: Submission Item Types

- PolicyManager > Submission Policies > Edit Submission Items

Item Type:

Maximum 256 characters

Item Type Family: ▼

This Submission Item Type is a Companion File (not built into PDF)

Reviewer PDF Handling ▼

Author/Editor PDF Handling ▼

Auxiliary PDF Handling ▼

Important Note: If 'Build Hyperlink to the Item into the PDF(Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

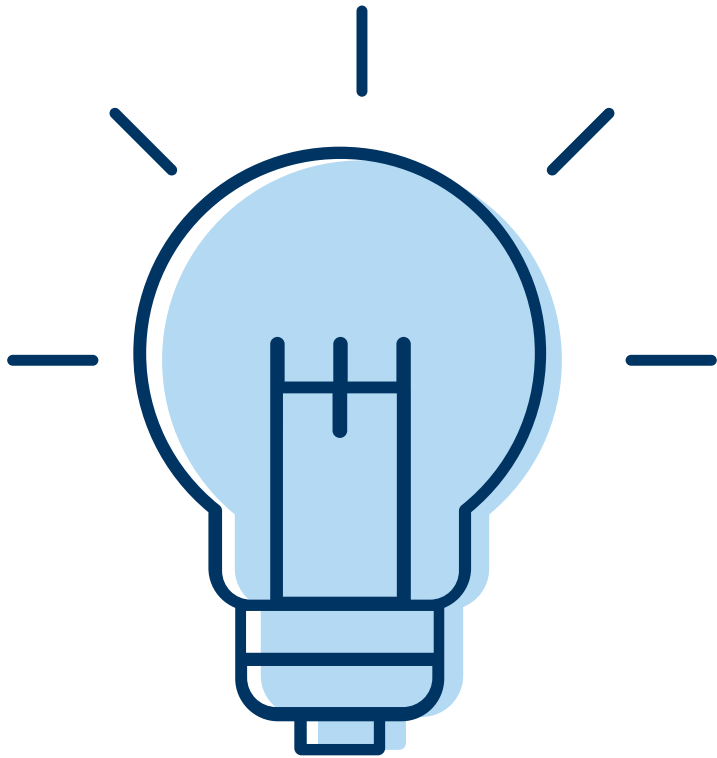
URL/URI/External Resource Entry (in lieu of file upload) : ▼

- Display with automatic line numbering in PDF
- Include this Item Type for Artwork Quality Checking
- Include this Item Type for checkCIF

Include this Item Type for Reference Checking

This Item Type will contain reference annotations. [Example](#)





Conflict of Interest Disclosures

AAMC's Convey

Challenge with Conflicts of Interest (COI)

- COI standards/policies vary between journals and are unevenly applied
- Authors need to manually collect the co-Author disclosures and send reminders
- Authors need to upload the disclosure files manually depending on the requirements of publications
- Authors have no visible way to know the status of each co-Author's submission of COI interests
- Publications often see discrepancies in disclosures



Automated COI Disclosure Workflows

- Request, retrieve, and view Author disclosures and attachments
- Industry standard disclosure forms to eliminate redundancies
- Centralizes Author COIs to a single platform
- Decreases need for Authors to fill out questionnaires across multiple journals and Editors to manually sift through PDFs



Streamlines & Centralizes Disclosures

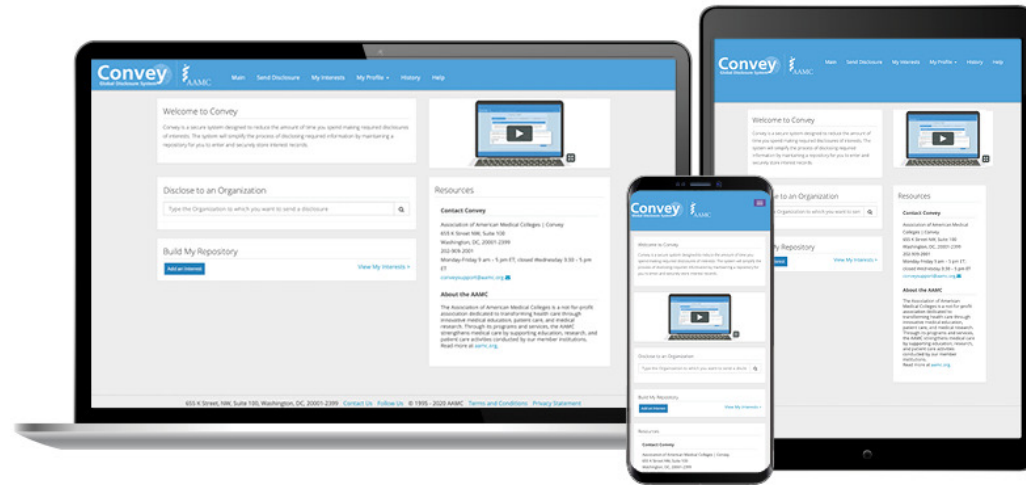
Supports Research Integrity

Saves Authors and Editors Time

Reduces Delays Upfront



Convey: How it Works for Publications



Set your organization's policy and instructions



Select the data elements you want to receive from your disclosers



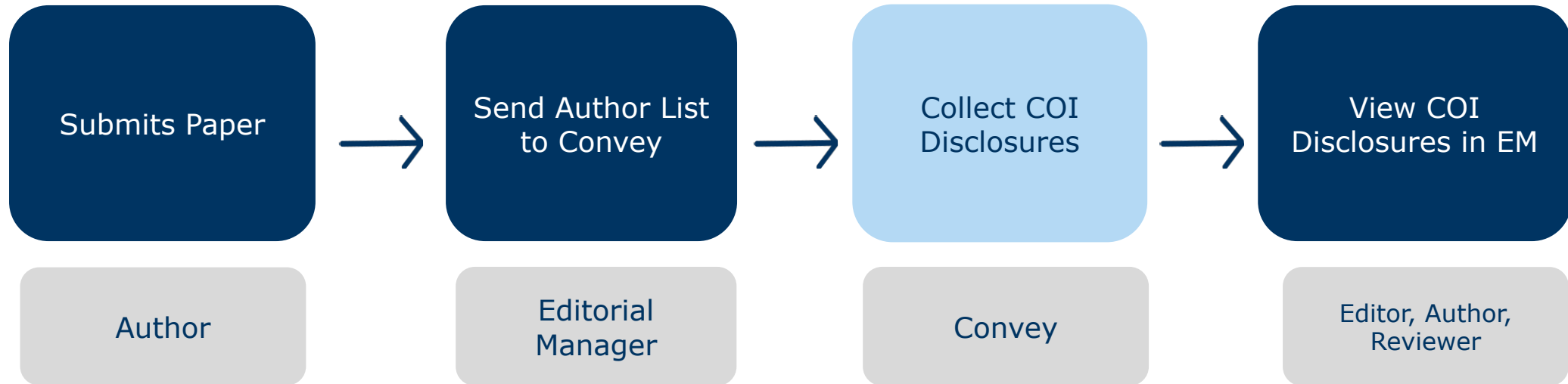
Create additional questions to ask disclosers



Start collecting disclosures through Convey



Convey: Author Experience



Convey: Matching Authors

Manage Disclosers - Governance Committee

Last Name x Request Date Status Submission Date Disclosure Incomplete Info

Disclosers

<input type="checkbox"/>	Title	Last Name	First Name	Email	ID	Request Date	Status		
<input type="checkbox"/>	Ms.	Winningham	Stacey	swinningham@aamc.org	6605		Submitted 5/15/20 Cloned: 6/18/20	<input type="button" value="- Select Action -"/>	
<input type="checkbox"/>	Ms.	Sims	Stella	ssims@aamc.org	S7553942		Not Started	<input type="button" value="- Select Action -"/>	
<input type="checkbox"/>	Dr.	Roberts	Alexandra	aroberts@aamc.org	R6593658		Not Started	<input type="button" value="- Select Action -"/>	
<input type="checkbox"/>	Mr.	Jordan	Randy	rjordan@aamc.org	RJ123		Not Started	<input type="button" value="- Select Action -"/>	
<input type="checkbox"/>	Professor	Johnson	Douglas	djohnson@aamc.org	R3742067		Not Started	<input type="button" value="- Select Action -"/>	



Creating Relationships



Matching if set to Clone



Each Author has their own account to prevent duplicates



AACID assigned to each user



Convey Emails Author with Deep Link

File Message Help Acrobat Tell me what you want to do

Delete Archive Reply Reply All Forward Quick Steps Move Tags

Stacey To Manager Team Email Mark Unread Categorize Follow Up Editing Speech Zoom Insights View

Mon 6/15/2020 11:33 AM
Do_Not_Reply@aamc.org
IMPORTANT: Submit Your Disclosure!

To Stacey Winningham
Retention Policy 24 Months Delete All Folders (2 years) Expires 6/15/2022

[Start Disclosure for Editorial Manager Test](#)

If you already have a free AAMC account:

- Click the **Start Disclosure for Editorial Manager Test** link above, log in with your AAMC username, and start your disclosure.

If you do not have a free AAMC account:

- Click the **Start Disclosure for Editorial Manager Test** link above, and then click "Create AAMC Account".
- After you create an account, you will receive a confirmation email from aamc_registration@aamc.org. Click on the link provided in the confirmation email to verify/activate your account.
- Once your account is verified, return to this email and click the **Start Disclosure for Editorial Manager Test** link above, log in with your AAMC username, and start your disclosure.

AAMC

Sign In

Username
Enter Username

Password
Enter Password

SIGN IN

[FORGOT YOUR USERNAME?](#)
[FORGOT YOUR PASSWORD?](#)
[NEED HELP?](#)

Don't have an account?
Register for an AAMC account to begin accessing products and services.

[CREATE ACCOUNT](#)

***Check your inbox and spam/junk folders for the AAMC account confirmation email. If you did not receive it, go to convey.aamc.org and sign in. You will be given the option to correct/change your email and have the confirmation email resent. Please add aamc.org to your approved senders list.*



Author Workflow in Convey

- Step 1: Review Organization's policy and instructions
- Step 2: Enter interests and relationships

Sending Disclosure To: University of AAMC

Policy Details | Enter Interests | Additional Questions | Review and Send

Policy & Instructions

The University of AAMC Conflict of Interest Policy was developed to ensure integrity in research and patient care that occurs at our institution and affiliated entities. All individuals who participate in research or clinical care activities are required to submit to the University a disclosure of all financial interests that relate to that person's institutional responsibilities, as well as those financial interests of the person's spouse or dependent children. Individuals disclosing to the University of AAMC are expected to disclose all required financial interests held within the last 12 months and over a threshold of \$5000.

The Discloser Identifier is unique to you and is used by the University of AAMC to match your disclosure to your institutional records. If it is not filled in for you automatically, please add your ORCID identifier or type your University of AAMC employee ID into the box for this disclosure. If the Disclosure Purpose is not filled in for you automatically, please type in 'Annual Disclosure'.

This organization accepts ORCID iD as your Discloser ID. If you already have an ORCID iD or would like to obtain one, you can retrieve or create it by clicking the ORCID icon above the Discloser ID field. If Convey has previously saved your ORCID iD, it has been used as your Discloser ID. To learn more about ORCID, visit <http://orcid.org>.

Discloser Identifier Create or Connect your ORCID iD

Disclosure Purpose

Convey Global Disclosure System | **AAMC** | Main | Send Disclosure | My Interests | My Profile | History | Help | Stacey Winningham

Sending Disclosure To: University of AAMC

Disclosure Purpose:

Policy Details | Enter Interests | Additional Questions | Review and Send

Do you have anything to disclose?

Add an Interest

Nothing to Disclose

Cancel

Convey Global Disclosure System | **AAMC** | Main | Send Disclosure | My Interests | My Profile | History | Help | Stacey Winningham

Adding an Interest

Search for and select an entity | Select an Interest | Add details for the selected interest

1 | 2 | 3

Search for an entity

Fondation Sanofi Espoir
SANOFI US SERVICES INC. - NJ, USA
Sanofi
Sanofi China Investment Company

Cancel

Author Workflow in Convey

Convey Global Disclosure System

AAMC

Main Send Disclosure My Interests My Profile History Help Stacey Winningham

Sending Disclosure To: University of AAMC

Disclosure Purpose:

Policy Details Enter Interests Additional Questions Review and Send

The questions on this page have been requested by the organization identified above, and your answers are specific to this disclosure. In the future, you will be able to see your answers by reviewing this submitted disclosure, which can be accessed through your History. Any information that you enter here will not change or add to the interests saved in My Financial Interests for future disclosures.

Do you want to review this organization's policy & instructions? Add an Interest

Additional Questions

1. Please provide your title and summarize your role with the University of AAMC:

Required

- Step 3: Answer disclosure specific additional questions

- Step 4: Review and send

Financial Interests Not Included In This Disclosure

Edit

Any interests displayed in this section are in your 'My Financial Interests' repository but **will not be disclosed** to this organization. These interests were either automatically excluded or you excluded them from this disclosure. You can revise which interests will be disclosed to this organization by clicking **Edit** in this section or the one above. If there are no interests in this section, all of the interests you have stored in Convey will be disclosed to this organization.

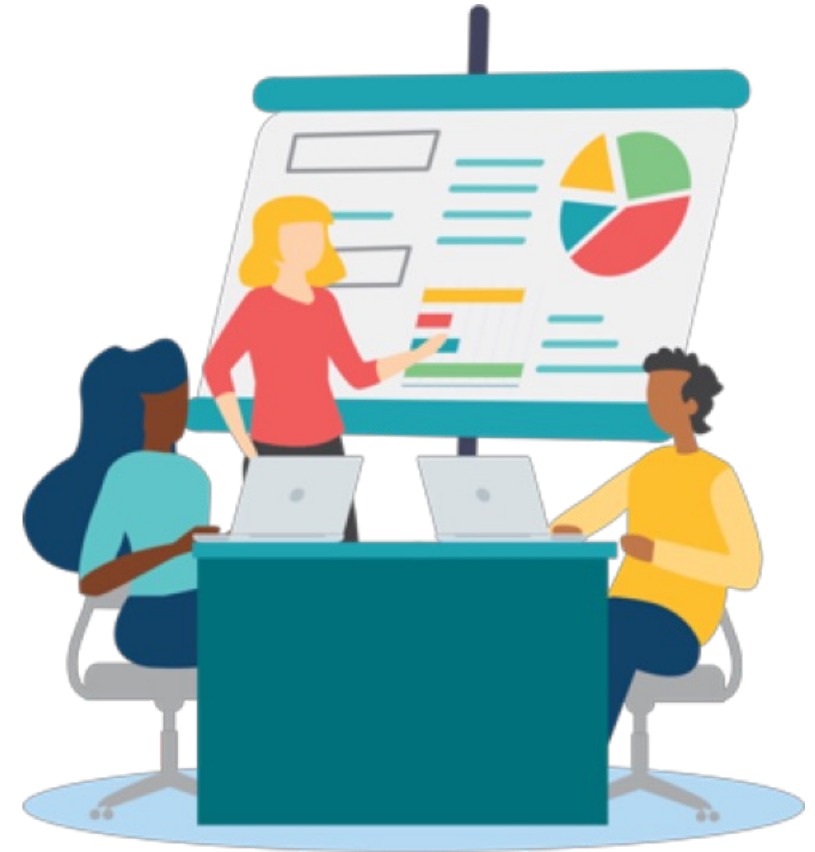
Certification

I certify that the information I am disclosing is complete and accurate

Back Certify and Submit

Reports: Viewing COI Disclosures in EM

- Two Standard COI Disclosures Reports:
 - **Full Report:** View all Author disclosure information with access to download PDF files
 - **Restricted Report:** View redacted disclosure information (designed for Reviewers who are Anonymized in the peer review process)
- Which report the user sees depends upon their role permissions and the configuration
- The way the data displays is dictated by the Convey Reports associated with your Policy



Author View the COI Disclosure in EM

em Editorial Manager™

HOME • LOGOUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS • PRIVACY

Role: **Author** English

Revisions Being Processed for Author Amy Author

Page: 1 of 1 (1 total revisions being processed) Display 10 results per page.

Action	Manuscript Number	Title	Date Submission Began	Status Date	Current Status
View Submission View Author Conflict of Interest Correspondence Send E-mail	ABCDEV161-D-18-00026R1	TT32971 Test	Oct 22 2018 12:32PM	Oct 22 2018 12:32PM	Revision Submitted

Page: 1 of 1 (1 total revisions being processed) Display 10 results per page.

<< Author Main Menu



View the COI Disclosure in EM

Conflict of Interest Disclosures for Manuscript Number: DEMO170-D-19-00015 "Test Submission"

[Close](#)

All available Conflict of Interest disclosure information is displayed below. You may use the 'Request Updated COI Data' to request more recent data.
[Request Updated COI Data](#) **Last Updated Oct 17, 2019**

Authors

Name	Disclosure Status	
Randy Jordan	Aug 19, 2020	Fi v
Yitzhak Rabinowitz	<i>Not Requested</i>	Indicates the disclosure has included interests v
Alexandra Roberts	<i>Not Requested</i>	v
Ganguli S	<i>Not Requested</i>	v
234 sdf	May 22, 2020	Fi ^

Discloser
Identifier: 01_SP_cloning Requested Date: Jun 12, 2020

[Show Full Details](#) [Download PDF](#)

Summary of Financial Interests
test (Copyright),
test (Patent),
3M Company (Spouse/Partner: Gift),

- Permissioned users can view the report (either Full or Restricted view)
- Customize page instructions by user role
- Real-time data pulled each time page is rendered or refreshed
 - Authorized Editors can request updated data
- Click "Show Full Details" and "Download PDF file"
 - View Supporting Information and Files



View the COI Disclosure: Report

The screenshot displays a web interface for viewing a COI Disclosure Report. The main content area shows a summary for a disclosure by Leaha Hindert, titled "Editorial Manager Test". The identifier is 24521342, the purpose is "Demonstration, Purpose, Annual Disclosure", and the date is Aug 11, 2020, 2:53:07 PM. A link "Go back to summary view" is present.

Two pop-up windows are overlaid on the main content:

- Summary of Financial Interests**
Company or Organization

Entity	Interest Type
180 Medical, Inc.	Consultant

Close

- Additional Information**

1. What order is it?
 - a. **Independent Contractor - Other 3D Systems**
Test
 - b. **Independent Contractor - Expert Witness 3M Company**
test
 - c. **Independent Contractor - Consultant** A. James Clark School of Engineering
 - d. **Employment** ACADIA Pharmaceuticals Inc
 - e. **Empolvment** Smiths Medical ASD. Inc.

Close

At the bottom of the interface, there are buttons for "Show Full Details" and "Download PDF".



What if the Author List Changes?

- When Authors are added or removed an automatic update is sent to Convey
- Once an Author is removed, the Author is no longer visible on the Conflict-of-Interest Disclosure page and is set to a status of "ARCHIVED" in the Convey records
- New Authors will receive a request to disclose their interests and relationships



Example Anonymized COI Report

- Alias replaces Author name and email
- A row for each Interest Type
- Export All Data
- Filter and Sort with funnel icon in top right corner

Conflict of Interest Disclosures for Manuscript Number: DEMO.2021.0003 "Diabetes Mellitus Submission"

Close

All available Conflict of Interest disclosure information for the authors of this submission is displayed below.

Last Updated: 05/25/2021 12:35:07

Name	Disclosure Date	Interest Held By	Interest Type	Entity / Licensee
Discloser 001	04/01/2021 6:59 PM	Self	Independent Contractor - Other	Oxford Brookes University
Discloser 001	04/01/2021 6:59 PM	Self	Other IP	
Discloser 001	04/01/2021 6:59 PM	Self	Copyright	
Discloser 001	04/01/2021 6:59 PM	Self	Other IP	
Discloser 001	04/01/2021 6:59 PM	Self	Employment	Aries Systems
Discloser 001	04/01/2021 6:59 PM	Self	Independent Contractor - Other	University Of Birmingham
Discloser 002	04/01/2021 6:52 PM	Self	Employment	Oxford Brookes University
Discloser 002	04/01/2021 6:52 PM	Self	Independent Contractor - Expert Witness	British Medical Association
Discloser 002	04/01/2021 6:52 PM	Spouse/Partner	Stock	Oxford University Press
Discloser 002	04/01/2021 6:52 PM	Self	Independent Contractor - Consultant	Oxford University Hospitals NHS Trust

Export

Items per page: 50 1 - 10 of 10



Editorial and Production Task Transmittals

- Include COI Disclosures - XML Files
 - Convey returns an XML file(s) for each Author, when available
- Include PDF when configured for the COI Disclosures
 - Convey returns a PDF file(s) with all supplemental files included for each Author, when available
- Editorial Manager Zips Files with other Transmittal Files

Questionnaire Options

Use Custom Questionnaire: None

FTP Options

Submission Production Task Transmittal Method: General Submission Production Task Export

- Allow task assignment and FTP without Assignment Files
- Include Aries Import XML file in transmittal
- Include XML version of Author COI data files in transmittal
- Include PDF version of Author COI data files in transmittal
- FTP task without go.xml file
- Use Manuscript Number for package file names
- Rename transmitted files by File Reference

Secure FTP Server address (e.g. sftp://ftp.ariessys.com[:21]):

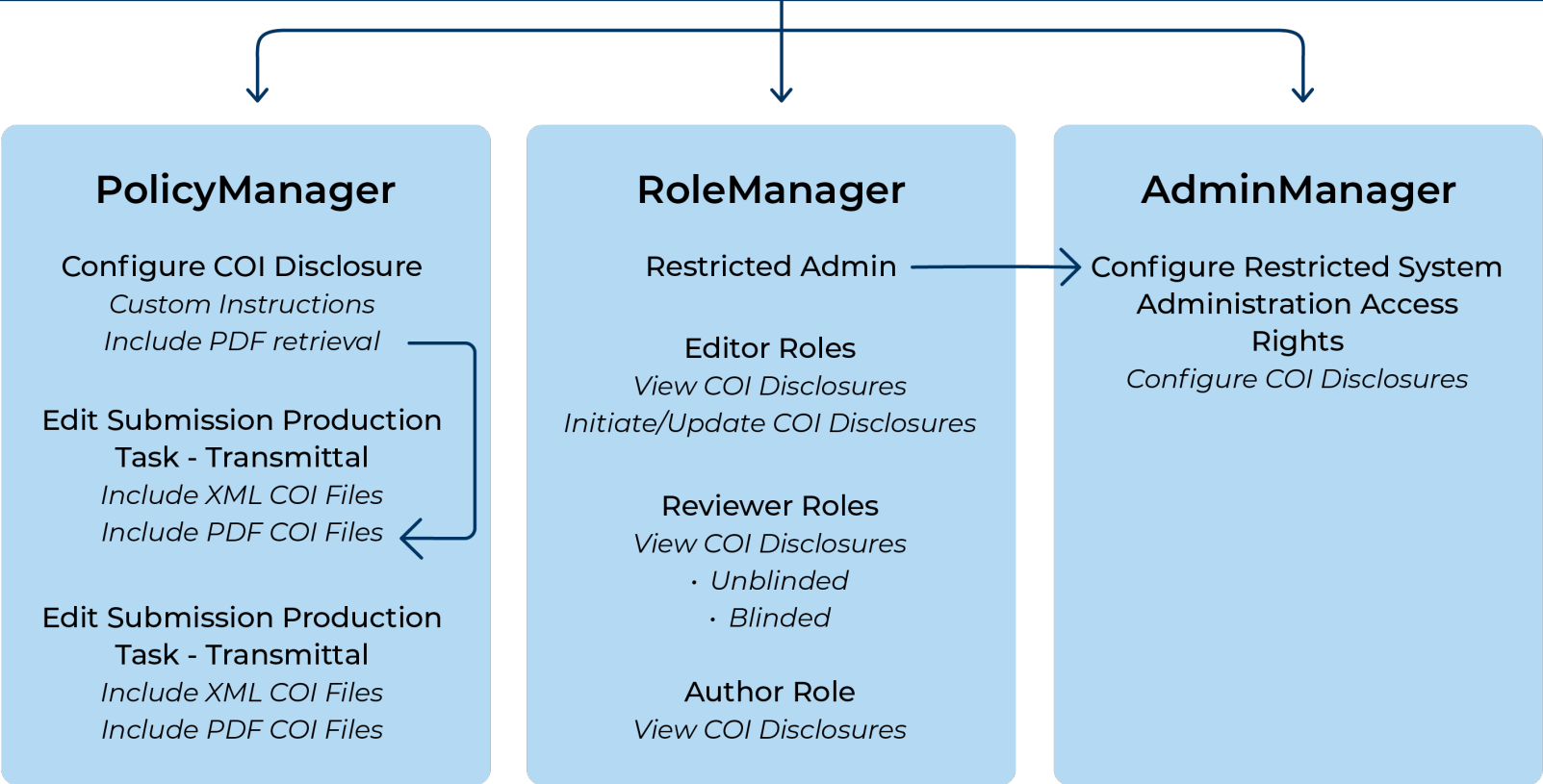
Required Import

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>  
<FinancialInterestPackages xmlns:ns2="http://ns.medbiq.org/name/v1/"  
xmlns:ns3="http://ns.medbiq.org/address/v1/"  
xmlns:ns4="http://ns.medbiq.org/member/v1/"  
xmlns:ns5="http://ns.medbiq.org/Disclosure/v1/"  
xmlns:ns6="http://convey.aamc.org/conveydisclosure/v1/"  
xmlns:ns7="http://ns.medbiq.org/common/v2/"  
xmlns:ns8="http://www.w3.org/2004/08/xop/include"  
xmlns:ns9="http://www.w3.org/1999/xlink">  
  <ns5:IndividualFinancialInterestPackage>  
    <ns5:Metadata>  
      <ns5:DisclosureProfile>Sample</ns5:DisclosureProfile>  
      <ns5:CreationInfo>  
        <ns5:UniqueID domain="AAMC ID">20956015</ns5:UniqueID>  
        <ns5:UniqueID domain="Disclosure Identifier">T123</ns5:UniqueID>
```



Configuring Convey for EM

Publication/Publisher must have relationship with Convey to integrate!
Aries Account Coordinator configures/enables with the information provided by Convey



Configuration: Role Permissions

Edit Role Definition

Role Name: Author

Check the functions that this role is permitted to perform.

- View Status Date
- View Current Status
- View Other Author Status
 - Manage Other Authors
 - Edit Other Author E-mail Address
- Allow Access to Reviewer Names and Reviews:
 - After Final Decision of Accept, Reject or Reject and Transfer
 - After First Decision
- Send Ad Hoc E-mail
- View Author Related Correspondence History
- View Author COI Disclosures
- View Similarity Check Results

Author Role

Permissions for Pending Assignments and Completed Assignments

- View Status History
- View Correspondence History
- View Corresponding Author

Reviewer Role(s)

- View Author COI Disclosures
 - View Unblinded Version
 - View Blinded Version

- View Similarity Check Results
- View CheckCIF Results
- View Editorial Status History
- Upload

- View Duplicate Submission Check Results
- Initiate checkCIF
- View checkCIF Results

Editor Roles

Bibliographic Search

- Publons w/ Abstract

- View Author COI Disclosures
 - Request Updated COI Disclosure Data
- View Editorial Status History



Configuration: Instructions & PDF Disclosures

- PolicyManager > Submission Policies > Configure Conflict of Interest Disclosure

Configure Conflict of Interest Disclosure

The instructions displayed for Editors, Reviewers, and Authors when viewing COI data in Editorial Manager may be customized below. Submit this page to save your changes.

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

Page	Instructions
View Conflict of Interest Disclosure (Editor View)	Insert Special Character All available Conflict of Interest disclosure information for the authors of this submission is displayed below. View Default Instructions Revert to Default Instructions
View Conflict of Interest Disclosure (Reviewer View)	Insert Special Character All available Conflict of Interest disclosure information for the authors of this submission is displayed below.

View Conflict of Interest Disclosure (Author View)

[Insert Special Character](#)

All available Conflict of Interest disclosure information for the authors of this submission is displayed below.

[View Default Instructions](#) [Revert to Default Instructions](#)

Retrieve disclosures in PDF format (in addition to the default XML format)

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



Configuration: Disclosure Workflow Triggers

- PolicyManager > Submission Policies > Edit Article Types
- Article Types can be configured to initiate the collection of disclosures at different workflow points
- Author List Changed - Added or Removed is automatically done once the collection has been initiated

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

Duplicate Submission Check:

- Check for duplicate submissions to Editorial Manager

Conflict of Interest Check:

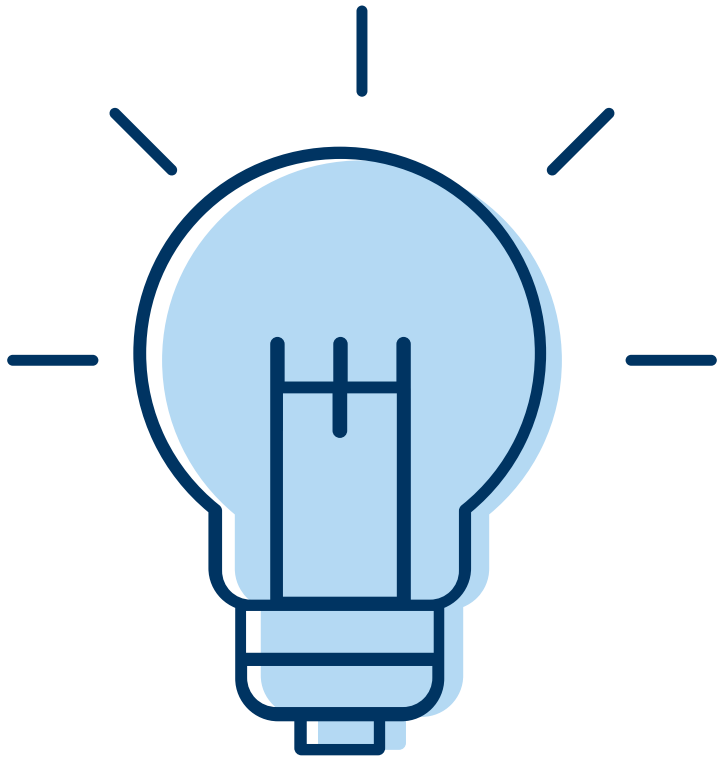
- Retrieve COI Disclosures for this article type.
Automation options for retrieving COI Disclosures:
 - New Submission Sent to Publication
 - Technical Check is Completed
 - First Editor Assigned
 - Revised Submission Sent to Publication

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.

You must also enable the check for duplicate submissions on the Configure Duplicate Submission Check page.

To manually request COI Disclosures, do *not* check any of the automation options. Editors will need permission configured in RoleManager





Chinese Mobile Manuscript Status Check

Charlesworth WeChat Gateway

Chinese Scholarly Publishing & WeChat

- China is a leading producer of academic papers
 - 39% increase in output 2014-19
 - 20.9% of world output in 2019
 - 3,500+ research-focused institutions
- WeChat is the leading instant messaging, social media, and mobile payment app in China
 - 1.15 billion monthly active users, 82 mins of daily engagement ([Walk the Chat](#))
 - 34% of total mobile data traffic in China is based in WeChat ([Walk the Chat](#))
 - 83% of WeChat users use the general app for work ([ChinaChannel](#))



Charlesworth WeChat Gateway & EM

- WeChat Gateway is a web-based content marketing and Author communication platform for STM
- Provides Authors access to status updates on their submitted manuscript
 - Allows Author to self-check the status of their manuscript through publication's WeChat account
 - Allows journal to push customized status notifications to the Author
- Manage journal WeChat posts and analytic dashboards to inform China marketing strategy



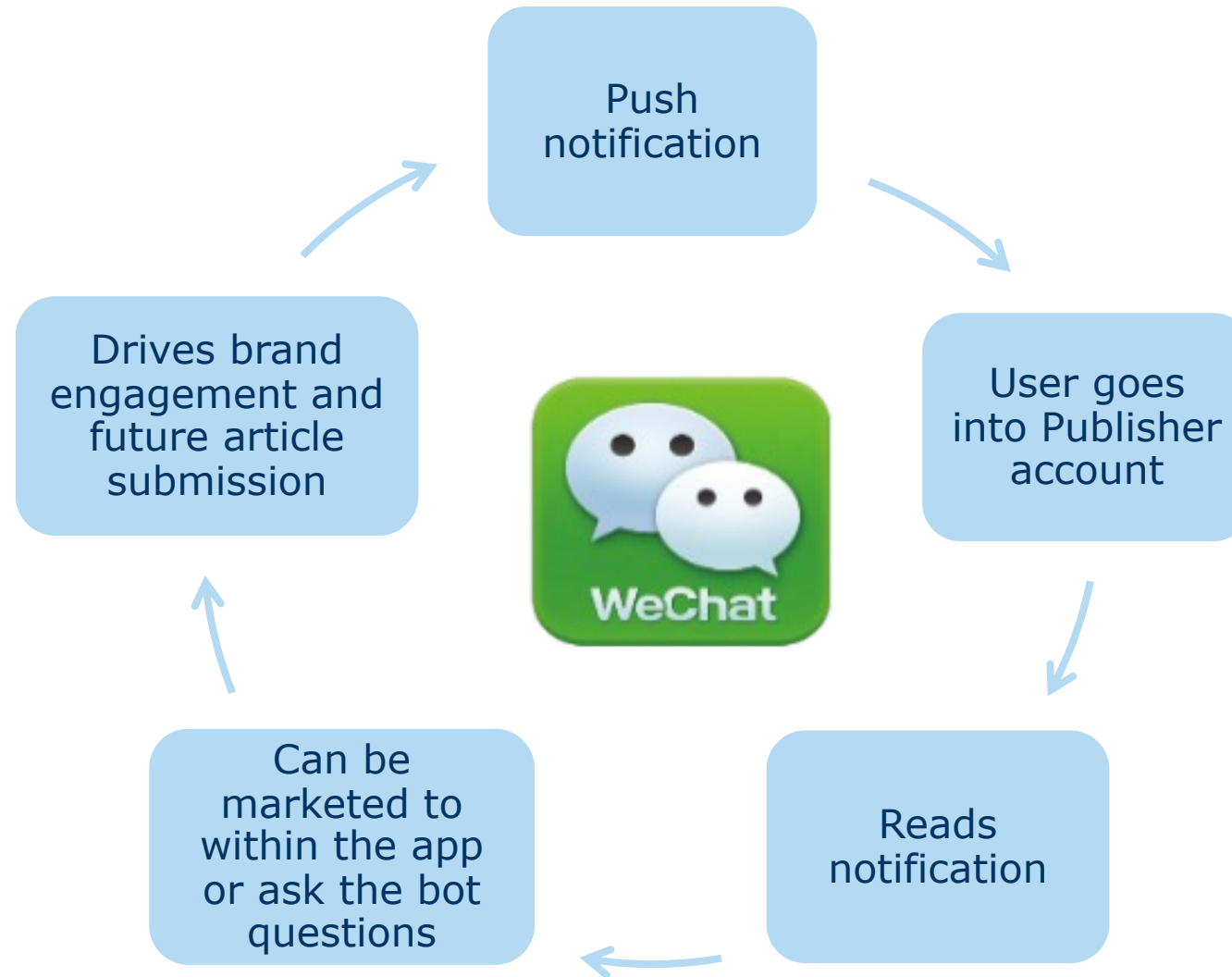
Increases Engagement with International Researchers

Promotes Transparency and Visibility for Authors

Saves Editor Time by Reducing Author Queries



WeChat Gateway: How it Works



Connecting WeChat with EM Site



Author scans WeChat QR code to Follow Publisher WeChat Account

Select TITLE STATUS INQUIRY menu on Publisher WeChat Account

Select Journal from list of publications on Publisher WeChat Account

Enter Credentials and Complete Login Authentication

WeChat Gateway Communicates with EM

EM Replies with Data Confirmation



Link WeChat Account to EM Account



Random Journal Title

A one-time login validation is required to link your WeChat account with your <publication full name> **single sign on (SSO)** for your Editorial Manager account.

Validate

[Help?](#) [Register Now](#)



Random Journal Title

A one-time login validation is required to link your WeChat account with your <publication full name> Editorial Manager account granting permission to send status

Username

Password

[Send Login Details](#) [Validate](#)

[Help?](#) | [Register Now](#)



Random Journal Title



Success

You have successfully validated your <publication full name> EM Account.

Please allow 24 to 48 hours for us to complete the connection of this account with your WeChat account for status notifications of your submissions.



Random Journal Title

Help with Logging In

Why do I have to Login?

You have reached this Login page because this is the first time you are requesting to receive status notifications for one or more of your submissions. We must first validate your login credentials with the publication for security purposes.

What Login Credentials Should I Use?

Enter the username and password you normally use to view your submissions for the selected Publication. Once you have successfully entered your login credentials, you will not be asked to complete this step again.

[Return to Login Screen](#)

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[Aries Privacy Policy](#) | [Publisher's Data Use Privacy Policy](#)

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Pull Notification



User enters
paper numbers

Gateway Template
Message Response

- Use Charlesworth Gateway Chat Bot for Pull Notifications to Authors
- Authors never have to leave WeChat to get a status update on their submissions

Unlink WeChat from Publisher EM Site

Update My Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

[Edit 'Go to' Publication List](#)

[Correspondence History](#)

[Insert Special Character](#)

Login Information

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

Username *


Password * [Password Rules](#)

Re-type Password *

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Linked Accounts

 WeChat Notification Channel	Unlink
---	------------------------

[Insert Special Character](#)

Personal Information

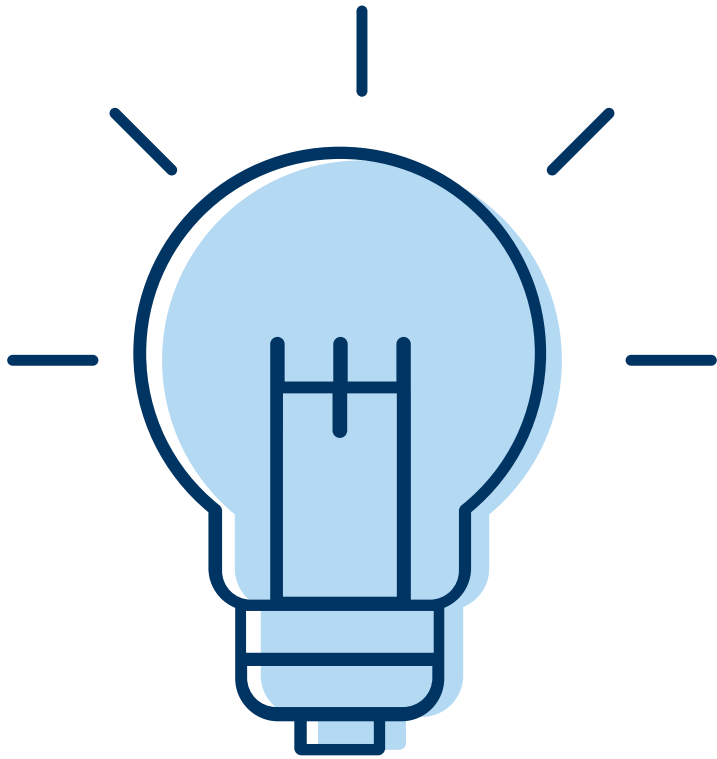
Title (Mr., Mrs., Dr., etc.)

Given/First Name *

Secondary Given/First

- Update My Information Page
- Search People – Update Information
- Under “Linked Accounts” section





Data Repositories

Dryad, Figshare

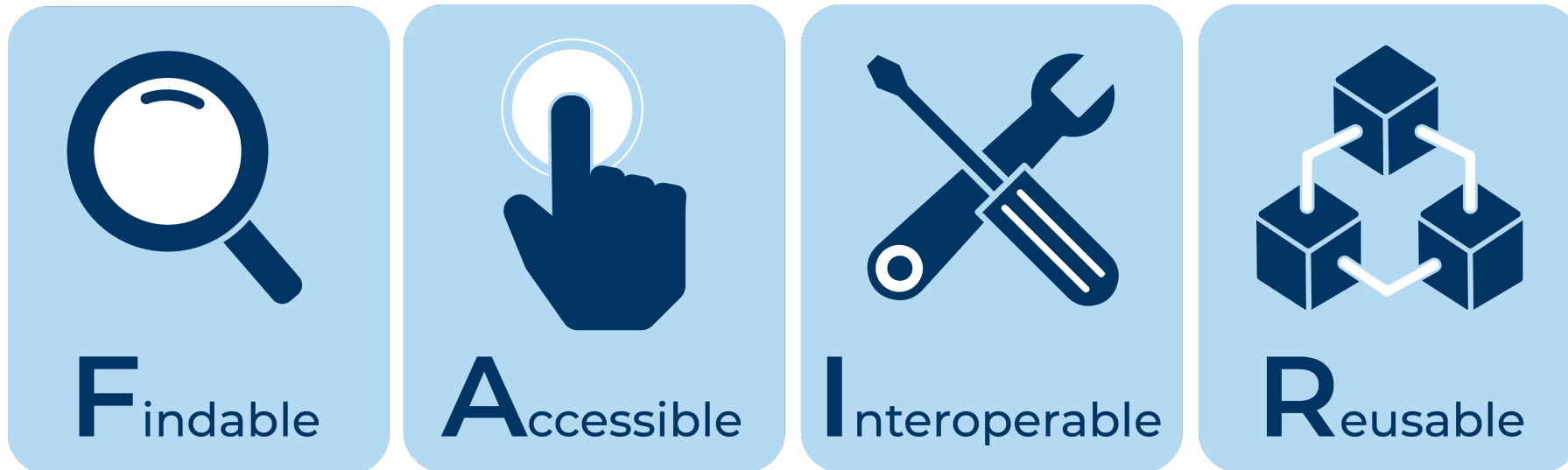
Data Availability

- Many publishers encourage or require Authors to make some/all of their research data available to the journal/public
 - Data Availability Statement
- Most publishers have their own data sharing policy and require compliance
- Can be arduous for Authors to share larger supplemental files and locate older data/digital assets
- Authors may experience delays to publication if data is shared later in the editorial process



FAIR Guiding Principles

- Many publishers align with the FAIR data framework
- Aries supports the FAIR Guiding principles
- Community-agreed framework for scholarly data



Data Repository Deposits from EM

- Seamless deposit of data during the Author submission process
- Publications may select which repositories Authors can deposit files and submissions to
- Allows datasets, image banks, video libraries, etc to be cited and linked
- Powered by Aries' Repository API:
 - Generic design: flexible for universal third-party repository partnerships
 - Repository DOI displays for repository items on the file inventory page
 - Configure repository profile while allowing custom configurations for specific publishers



Captured Upfront to Prevent Delays

Makes Data Discoverable and Citable

Increases Research Validity, Replication, and Reuse

Supports Author Visibility and Recognition

Improves Author Experience



Repository Integration Options in EM

1. Author deposits dataset to repository and pastes URL to dataset within EM as a “URL/URI/External Resource” Submission Item
2. Author can upload to repository from EM during the submission workflow – Author interacts with EM and popup page hosted by repository
3. Behind-the-scenes upload to repository from EM during the submission workflow – Author interacts with EM



Author Enters URL to Dataset During Submission

[Insert Special Character](#)

Select Item Type
Dataset

Description
Dataset

Delivery Method
 Online Web System URL/URI/External Resource

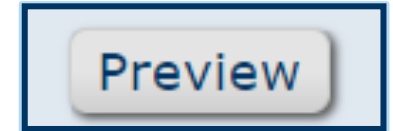
URL/URI/External Resource Location:
http://

Please select http://, https://, ftp:// or sftp://, then type in the remainder of the web address (e.g. www.targetsite.edu/datasets/dataset1) and click the 'Preview' button to ensure that the address you entered navigates to the correct location. Once you are satisfied with your entry, click the 'Attach This Information' button.



Author Enters URL to Dataset

- Author can preview the URL to ensure it was copied/pasted correctly
 - Journal can configure a Preview to be required
- URL can be included in Reviewer PDF and accessed throughout EM by permissioned users



The order in which the attached items appear is the order established by this publication. You may re-order any items of the same type manually if necessary.

Change Item Type of all files to [Check All](#) [Clear All](#)

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
<input type="text" value="1"/>	<input type="text" value="Dataset"/>	<input type="text" value="Dataset"/>	External Item		May 19 2021 12:56PM	<input type="button" value="Access Item"/>	<input type="checkbox"/>

[Check All](#) [Clear All](#)



Dryad Integration: Upload via Page Within Repository



- Author selects the repository from the drop-down list on the Attach Files EM submission page
- Create Deposit and "Go to Upload Page" button is displayed

Article Type Selection ✓ Attach Files ↓ General Information ✓ Review Preferences ✓ Additional Information ✓ Comments ✓ Manuscript Data ✓

✓ Manuscript
Please provide any additional items.

Insert Special Character

Select Item Type
Dataset

Description
Dataset

Select a repository then upload your file.

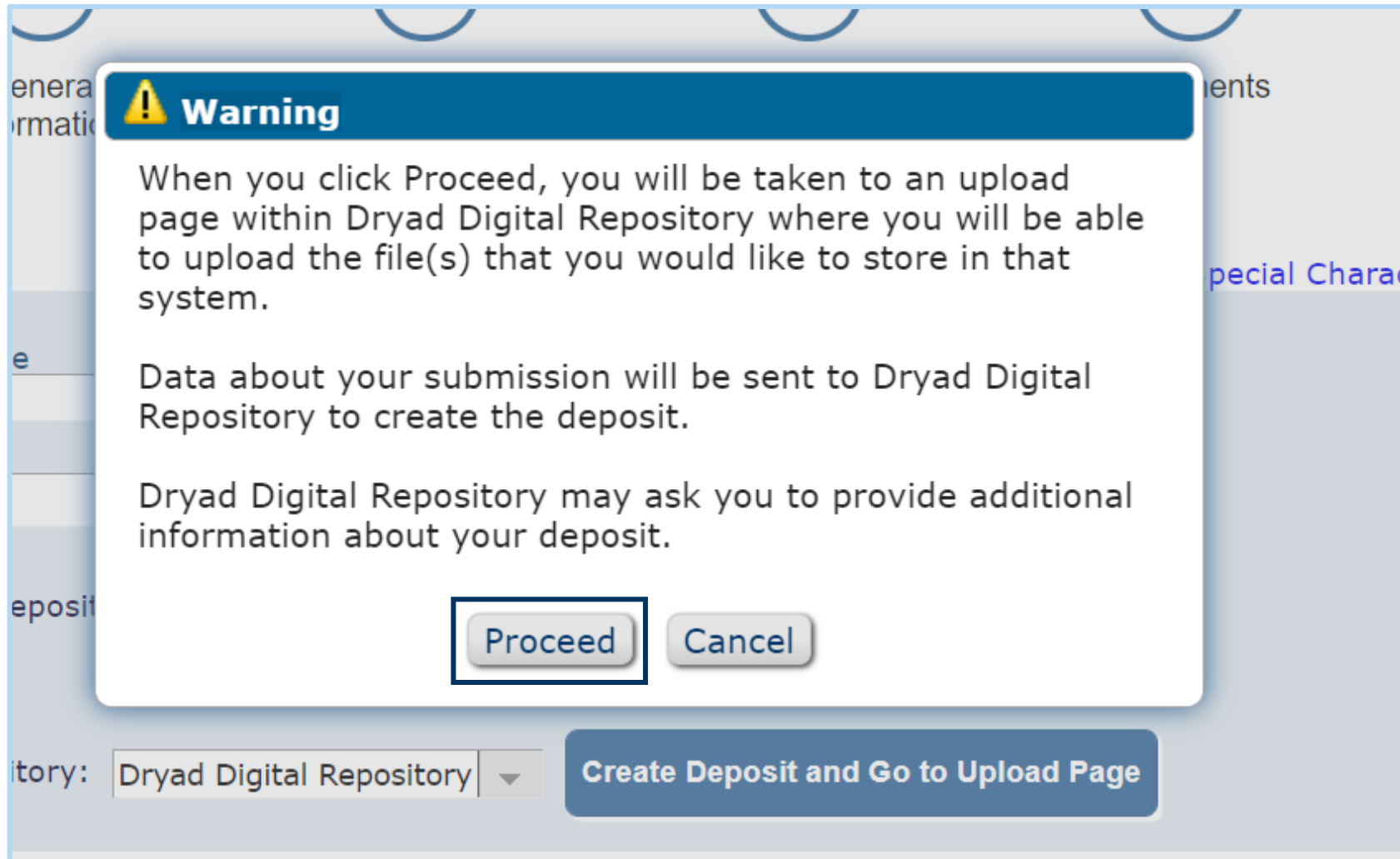
Upload to repository Enter URL/URI

Select a repository: Dryad Digital Repository
Please Choose
Dryad Digital Repository

Create Deposit and Go to Upload Page ←



Dryad Integration: Informational Alert for Author




The screenshot shows a warning dialog box with a yellow warning icon and the word "Warning" in a blue header. The text inside the dialog reads: "When you click Proceed, you will be taken to an upload page within Dryad Digital Repository where you will be able to upload the file(s) that you would like to store in that system. Data about your submission will be sent to Dryad Digital Repository to create the deposit. Dryad Digital Repository may ask you to provide additional information about your deposit." At the bottom of the dialog are two buttons: "Proceed" (highlighted with a red box) and "Cancel". Below the dialog, in the background interface, there is a dropdown menu showing "Dryad Digital Repository" and a large blue button labeled "Create Deposit and Go to Upload Page".

- A pop-up alert informs Authors that this option will redirect to an upload page within the repository
- “Proceed” opens the “Upload Files” to Repository pop-up window displaying the repository's user interface and passes information to the repository to start the deposit



Dryad Integration

Dryad Interface and Deposit

SearchAdmin | Explore Data | About | Help | My Datasets | Logout


You are editing Daniella Lowenberg's dataset. Cancel and Discard Changes

Describe Dataset Upload Files Review and Submit


Describe Your Dataset

Preliminary Information


My data is related to:



a manuscript in progress



a published article



other or not applicable

Please provide the following information. You may either enter the information and leave it or choose to autofill your dataset based on the information you supply below.

Journal Name *

eLife

Manuscript Number *

18-05-2021-ADV-eLife-66715

Import Manuscript Metadata

Dataset: Basic Information

Dataset Title *

Coordinating Manuscript Submission and Dataset Submission Reduces Burdens

Author(s)

First Name *

Daniella

Last Name *


Lowenberg

Institutional Affiliation *

California Digital Library

Author Email *

Daniella.Lowenberg@ucop.edu

 <https://sandbox.orcid.org/0000-0001-9596-0781>

+ Add Author

Dryad Integration: Accessing the Deposit from EM

- Author is returned to EM, repository returns the URL(s) to EM
- View deposit via hyperlink to repository in File Inventory and other pages
 - (Editing is not available for Editors from File Inventory)
- Author-facing pages allow the Author to both Access and Edit the Item

Submission Files									
Check All Clear All	Action	Item	Description	Item Family	File Name	Size	Modified	QC	Display On TF
<input type="checkbox"/>	Download	Manuscript	Manuscript	Document	Sample Manuscript.docx	17.7 KB	May 28 2019 12:24PM	Error	
	Access Item	Repository Item	Repository Item	Default	External Item		Jul 9 2019 5:44PM	N/A	

[Upload Companion Files](#)

* 2 URLs maybe be returned: "View" URL and optionally, an "Edit" URL for Authors



Fishare Integration: Upload Page within EM

- Author selects the repository from the drop-down list on the Attach Files page in EM
- “Go to Upload Page” button is displayed



Select Item Type
Dataset

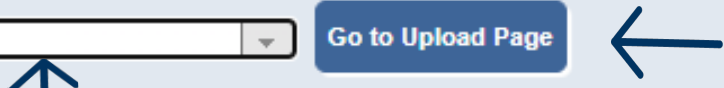
Description
Dataset

* If your manuscript is accepted, this journal offers automatic deposit of your files into Data Repositories. Please confirm which files and repositories you would like to select. These deposits will be embargoed until 30 days after publication.:

Please Choose a Value

Upload to repository Enter URL/URI

Select a repository: Figshare [Go to Upload Page](#)



Figshare Integration: Upload Page within EM


- The “Upload Files to Repository” pop-up window opens in EM
- Author can upload multiple files in the same deposit
 - Uploading a file on this page will trigger an API call to the repository to create the deposit and send the file and metadata to the repository

Upload Files to Figshare

Enter additional data about your deposit in the fields below. Required fields appear in red and are labeled with an asterisk. After you have uploaded a file, an Update Metadata button will appear on the page. To edit information in these fields, enter the new text and click the Update Metadata button.

Uploading a file on this page will immediately initiate transfer of the file to the external repository. You will see the status of file transfer in the file list below. Click the Cancel link to cancel an in-process file upload.

During file upload you may navigate to other pages in the submission process. Closing this page will not cancel any in-process uploads.

OR  Drag & Drop Files Here

Figshare Integration: Add Files/Edit Metadata for Deposit

Upload Files to Figshare

You may edit data about your deposit in the fields below. Click the Update Metadata button to send the updates to the repository. Required fields appear in red and are labeled with an asterisk.

Use the file upload tools (Browse or Drag & Drop) to transfer additional files to your deposit.

Uploading a file on this page will immediately initiate transfer of the file to the external repository. You will see the status of the file transfer in the file list below. Click the Cancel link to cancel an in-process file upload.

During file upload you may navigate to other pages in the submission process. Closing this page will not cancel any in-process uploads.


*** Deposit Description**

Data collected at Research Organization in 2019.

Comments

Research conducted by A. Author, R. Reviewer, E. Editor.

Update Metadata

Browse... OR  **Drag & Drop Files Here**

File	Status	Upload Date/Time
dataset001.db	Uploaded	Sep 10 2019 11:13AM
dataset002.db	Uploaded	Sep 10 2019 11:15AM

Close

- EM page - shows previously uploaded files
- Allows update of Metadata
- Allows upload of new files
- Author-facing page; Editors cannot access



After Upload: Access, Edit, or Add!

- Author stays in EM; repository returns the URL(s) to EM
- Author can access, edit, or add items deposited
- Editors can only “Access Item”

The order in which the attached items appear is the order established by this publication. You may re-order any items of the same type by dragging and dropping them into place.

Order	Item	Description	File Name	Size	Last Modified	Actions	Select
1	Manuscript	Manuscript	Manuscript.docx	9.6KB	Sep 09 2019 05:00PM	Download	<input type="checkbox"/>
2	Repository Item	Repository Item	External Item		Sep 09 2019 05:00PM	Edit Data Access Item Add Files/Edit Metadata Edit Item	<input type="checkbox"/>

[Update File Order](#) [Remove](#) [Check All](#) [Clear All](#)

[← Back](#) [Proceed →](#)



Access & Edit Item


You are previewing this dataset.

Dataset for submission : Dataset (Repo)

Description of this data

Test2

Experiment data files



Wm Herschel Portrait.jpg


Title of the dataset

Dataset for submission : Dataset (Repo)



Contributor(s): Anton Heimann | + Add

Research data files

Upload files of any type, up to a maximum of 10GB for the dataset. [Upload Files](#)




Wm H.jpg

+ Description 89 KB Cite  

+ Drop any filetype to upload

Scientific disciplines covered by this data

Enter the name of the scientific discipline

Aerodynamical Test 

Example interface within repository

- User can view the dataset by clicking on the file name or download the dataset
- Author can add files or change metadata



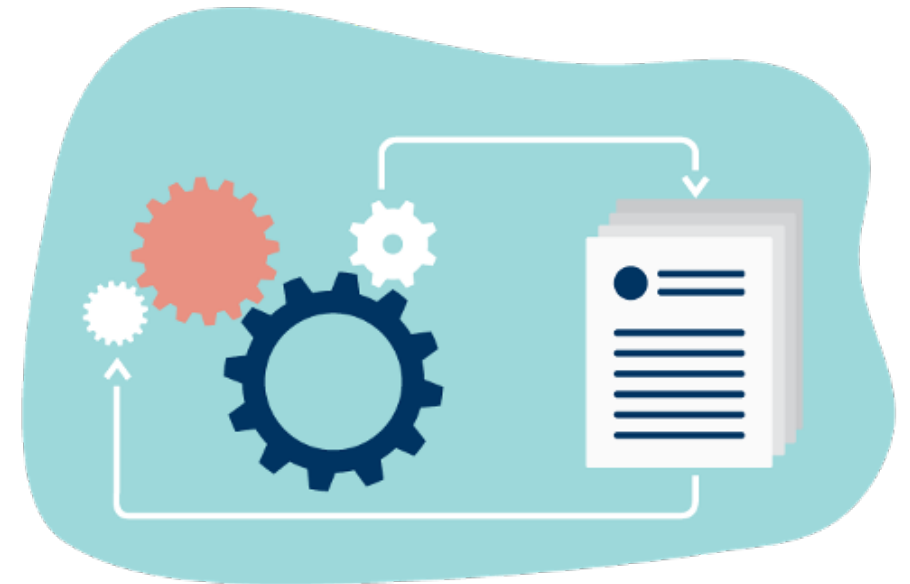
Display of Repository Item in a PDF

- URL returned from repository is built into the EM PDFs



After Initial Upload: Workflow Points

- **At revision:** Repository automatically updated with submission status and other submission metadata. New files uploaded directly to repository or from EM page
- **At final decision:** Repository automatically updated with submission status and other metadata
- **At publication (ProduXion Manager users):** Repository updated with submission status and other metadata if configured as a Production Task



Repository Configuration

System Admin
Settings

Each Repository made available behind-the-scenes by Aries Account Coordinators

- PolicyManager > Add/Edit Submission Item Type
- PolicyManager > Edit Article Type
- PolicyManager > Submission Production Task



Add/Edit Submission Item Type (e.g. "Dataset") in Supplemental Family

Item Type:

Item Type Family:

If the checkbox below is selected, authors will be required to deposit this file to a repository during the submission process (or enter a URL/URI for the item). This item will only be built into the system PDFs as a hyperlink.

This Submission Item Type is a Repository Item

Dryad Digital Repository

Repository Embargo Date (this setting will be included in the metadata sent to the repository):

- None
- days after Initial Submission
- days after Final Disposition of Accept
- 5 days after Publication Date

The following instructions will display on the *Attach Files* page to authors who select this item:

Select a repository then upload your file.



Add/Edit Article Type

- Enable the Submission Item Type for submission as Optional or Required for the Article Type, and set other parameters

Dataset	New Submission	Revised Submission
Required for Submission:	Optional ▼	Optional ▼
Allow Offline Submission:	Hidden ▼	Hidden ▼
<input type="checkbox"/> Exclude from Reviewer PDF (for New and revised Submissions)		
<input type="checkbox"/> Exclude from Auxiliary PDF (for New and Revised Submissions)		
<input type="checkbox"/> Publisher gets file: (for New and revised Submissions)		



Submission Production Task Configuration

Repository Notification

If one or more submission files were uploaded to a repository, completing this task can trigger a metadata deposit to notify the repository that the associated submission has been published.

This setting should only be selected for the task that occurs at the end of the production workflow, and indicates that a submission has been published.

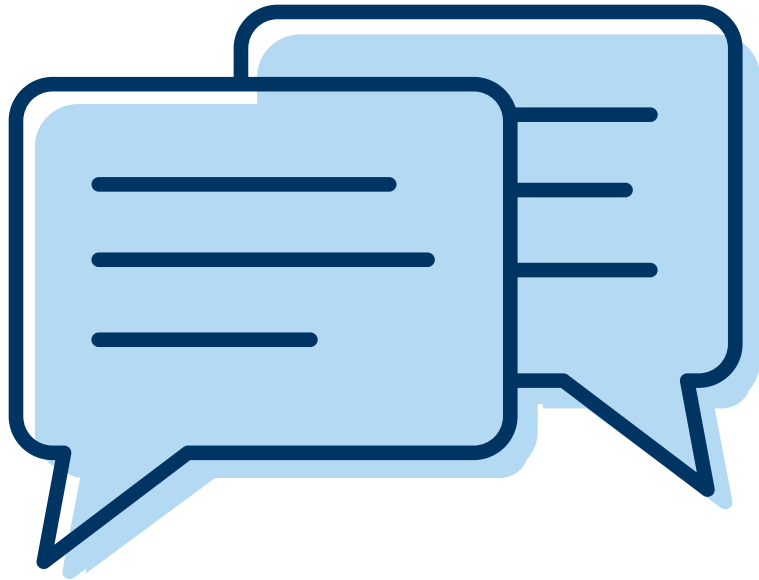
Notify repository at task completion



Resources

- EMHelp Articles
- EM/PM Release Notes Documentation
- Aries Ecosystem
 - [Aries Ecosystem: Connecting Publishers with the Right Technology](#)
- Aries Video Library & Blog
 - [Automating Research COI Disclosures with Convey](#)
 - [Automated Reference Checking](#)
 - [Engaging Authors in China through the WeChat Gateway and EM](#)
- Your Account Coordinator!





Questions?

Thank you!

Stay Connected

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