Welcome to EMUG 2015

em Editorial Manager®
www.editorialmanager.com

Aries systems
Publish Faster. Publish Smarter.

Transfer That!

Ann McLaughlin

Agenda

- Why use Transfer functionality?
    - Transferring to sister publications
        - Editorial Office Transfers
            - How are transfers initiated?
            - What kind of information carries over?
        - Author Initiated Transfers
- Transferring to EM and non-EM sites
- Setting up your sites for submission Transfers
    - Required Permissions
    - Letters and ActionManager events
- Transfers in another context (EM Ingest)

Why use Transfer functionality?

Cascading Workflow!

- Prevents rejection of papers due to topic
- Seamless resubmission process for authors
- Retention of original data and source files
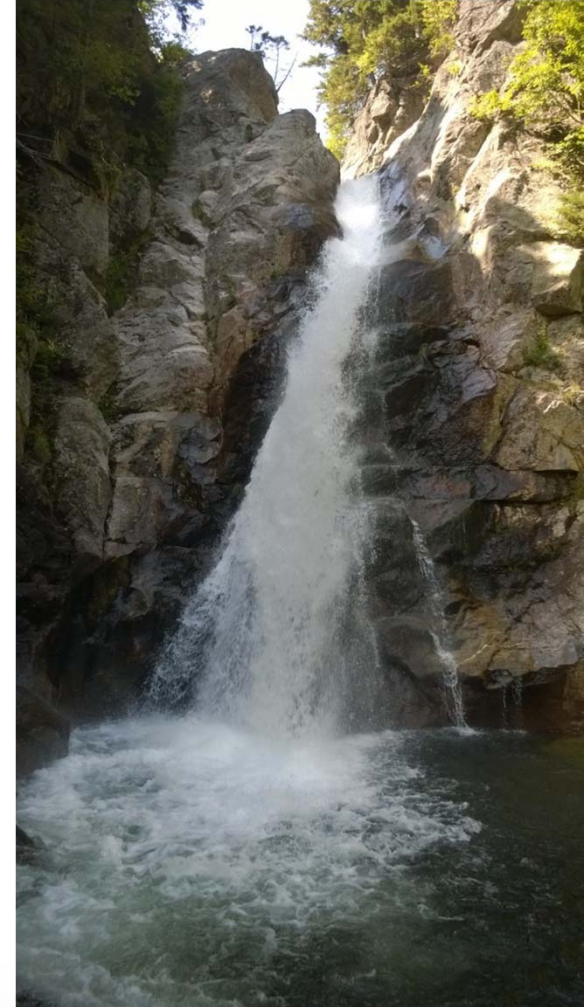
Types of Transfers

There are two basic types of Transfers:

Editorial Transfer

Reject and Transfer

Both can be used to transfer to EM and non-EM sites.

Types of Transfers

Editorial Transfers

Transfer is initiated by the Editorial Office in cases where topic suitability is quickly identified (meaning the submission has not been assigned to an editor).

Types of Transfers

Reject and Transfer

Transfer is initiated by the Editor at the time of decision, either before or after peer review.

How Editorial Transfers work

Set Final Disposition
"The value of transferring MSs"

Setting the final disposition completes the peer-review process. You may only set a Final Disposition of "Accept" or "Reject" after you notify the author of the editor's decision.

Setting a Final Disposition of "Accept" may initiate production or trigger transmittal of data to the publisher if your publication is configured to do this. If you choose a Final Disposition of "Transfer" a list of possible recipients will display. After you have made your choice, you will have an opportunity to customize letters regarding the transfer. When this process is complete, the submission will be transferred.

Production Status : Not in Production

Final Disposition: | Transfer ⌄ |

Please select a recipient publication: | DEMODT120 - DT Demo 12.0 ⌄ |

| Cancel | | Proceed |

How Reject and Transfer works

How Reject and Transfer works

Select Transfer Target Publications

Cancel   Proceed

Please select up to 2 publications to be presented to the Author as transfer targets. If you click on the "Proceed" button and then wish to change the list of target publications before the Author is notified, you may return to this page to change your selections.

☐ KH Demo 12.0 EM Website
☐ DT Demo 12.0 EM Website

Cancel   Proceed

How Reject and Transfer works

Pending Submission Transfer Offers

Submission Transfers Waiting for Author's Approval (1)

Submission Transfers Waiting for Author's Approval for Bill Penney

You have a manuscript that requires your approval to be transferred to another publication. Please click on the "Agree to Tr

Page: 1 of 1 (1 total submissions)

▪ Action ▲	Manuscript Number ▲▼	Title ▲▼	Initial Date Submitted
View Submission View Decision Letter Agree to Transfer Decline to Transfer Send E-mail	DEMO-AR112	The value of transferring MSs	Jun 16, 2015

Page: 1 of 1 (1 total submissions)

The Editor has suggested that your submission may be better suited for a different publication.

If you do not wish to transfer your submission you may select the radio button "DO NOT TRANSFER SUBMISSION" and click on the submit button. If you agree to transfer your submission, please select the radio button for the publication and click on the "Submit" button.

- ● DO NOT TRANSFER SUBMISSION
- ○ KH Demo 12.0   EM Website
- ○ DT Demo 12.0   EM Website

Cancel   Submit

What information transfers?

EM to EM Transfer:

- **Corresponding Author information**
  - EM-to-EM will link to People record or create new record
- **Co-Authors**
  - Including verification status
- **Submission metadata entered by Author**
  - e.g. Title, Abstract, Keywords

What information transfers?

- **Submission metadata**
  - Matching Article Type, Classifications, Category
- **Files**
  - All files for all versions of the submission
- **Additional Information**
  - Matching Custom Submission Questions
- **Reviews**
- **Decision Letter**

What information transfers?

EM to Non-EM Transfer:

- Information is transferred via FTP
- All submission files
- XML file with submission metadata
- Receiving site must import the submission

Configuring sites for Transfer

AdminManager Main Menu

Set Live Journal Flag
Manage Publication Groups
Set Default Target FTP Site for Extract of Conference Submissions
Share People
Configure Cross-Publication Submission Transfer
View File Transfer Statistics
Configure Restricted System Administration Access Rights
Configure Manuscript Service Providers for Ingest Service

EM to EM Transfer configuration

Configure Transfer Time Limit

If your publication has configured a Decision Term in the "Reject and Transfer" Decision Family, you may define a transfer time limit during which the Author can agree or decline to transfer a submission to one of the target sites configured below. If the deadline passes and the Author has not agreed to transfer, Final Disposition will be set automatically to "Reject", and the submission will not be transferred. You may enter a number between 1 and 90 in the box below.

Automatically Set Final Disposition to "Reject" if the Author does not agree to transfer a submission within [30] days.

Configure Transfer Target Publications

☑ Enable cross-publication submission transfer for EM publications in a People Sharing Group

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

Other Editorial Manager Publications:

There are currently no other EM publications defined for transfer.

Other Editorial Manager Publication [   ] (enter publication code)

[Add]

Restrict Transfer Target Publication(s)

When Authors are notified of a decision in the "Reject and Transfer" Decision Family, they are given the opportunity to agree or decline to transfer their submission to another publication. You may allow the notifying Editor to restrict the list of transfer targets presented to the Author.

☑ Allow the Editor to suggest the transfer target publication(s)

☑ Editors may suggest up to [2] publication(s)

EM to Non-EM Transfer

☑ Enable cross-publication submission transfer to non-Editorial Manager publications

Non-Editorial Manager Publications

There are currently no non-Editorial Manager Publications defined for transfer.

Add

Add Publication for FTP Transfer

Cancel   Submit

Insert Special Character

Publication Name:	
Publication URL:	
Transfer Method:	None ▼
FTP Server address (e.g. ftp.ariessys.com):	
FTP Username:	
FTP Password:	
Subdirectory:	

Cancel   Submit

RoleManager Permissions

☐ New Submissions

☑ Receive New Submissions in 'New Submissions Requiring Assignment' Folder

   ☑ Perform Technical Check (submission received in 'New Submissions' Folder)

☑ Receive New <mark>Transfer</mark>red Submissions in '<mark>Transfer</mark>red Submissions' Folder

☑ Submit Manuscript as an Editor

   ☐ Restrict to 'Editor/Publisher Use Only' Article Types

   ☑ Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types

       ☑ Notify Author after making a Decision

          ◉ Draft Notification Letter for any decision

            ☑ Send Any Notification Letter

          ○ Only Notify after selected decisions:

Decision Term	Decision Only	Draft	Draft and Send
Accept	◉	○	○
Revise	◉	○	○
Reject	◉	○	○
<mark>Transfer</mark>	◉	○	○
Editorial Reject	◉	○	○
Reject and <mark>Transfer</mark>	◉	○	○
Possible <mark>transfer</mark>	◉	○	○

    ☑ Create Automated Author <mark>Transfer</mark> Reminders

ActionManager events

Editor Decision and Final Disposition

Event	Managing Editor Letters
Editor Decision	Journal Office Notice Editor Decision Notification ⌄
Rescind Decision	Journal Office Notice Editor Decision Rescinded ⌄
Publication Charges Payment Requested	NONE ⌄
Publication Charges Payment Complete	NONE ⌄
Final Disposition - Accept on Submission	NONE ⌄
Final Disposition - Accept	NONE ⌄
Final Disposition - Reject	NONE ⌄
Final Disposition - Withdrawn	NONE ⌄
Author Agrees to Transfer Submission	Author Approved Transfer ⌄
Author Declines to Transfer Submission	NONE ⌄
Final Disposition - Transfer	NONE ⌄
Final Disposition - Completed Proposal	NONE ⌄

Editor Receives Submission

Event	Managing Editor Letters
New Submission Sent to Publication	Journal Office Notice New Submission ⌄
New Child Submission Sent to Publication	Journal Office Notice New Child Submission ⌄
Revised Submission Sent to Publication	Journal Office Notice Revised Submission ⌄
Submission Transferred to Publication	Author Approved Transfer ⌄
Notify Other Authors	NONE ⌄
Editor - Remove Submission	NONE ⌄

Fun Transfer Facts!

o There are several merge fields associated with transfers:

Transfer Submission Merge Fields

The following merge fields are used when the "Reject and Transfer" feature is used. These merge fields can be used in the 'Notify Author' letter, the Editor Notification of Author Accepts Transfer letter (as noted), or the Author Transfer Reminder letters. These merge fields are:

- **%AGREE_TO_TRANSFER%** - Inserts a hyperlink, which when clicked, fully logs the Author in and delivers him to the 'Transfer Submission to a Different Publication' page, where he can select the publication to which he wishes to have his paper transferred.
- **%DECLINE_TO_TRANSFER%** - Inserts a hyperlink, which when clicked, delivers the Author to the 'Decline to Transfer Confirmation' page, and automatically sets the Final Disposition if the submission to 'Reject'.
- **%TRANSFER_TARGETS%** - Inserts a list of all publications to which this submission can be transferred, along with links to these websites. The Author will be able to choose which of these sites she wishes to transfer her submission to when she agrees to the transfer.
- **%TRANSFER_OFFER_EXPIRATION_DATE%** - Inserts the date by which an Author must agree to transfer the submission before a Final Disposition of 'Reject' is automatically set. This date is calculated at the time the Author is notified of the Decision based on the number of days configured on the 'Configure Cross-Publication Submission Transfer' page.
- **%ACTUAL_TRANSFER_PUBLICATION_TITLE%** - Inserts the name of the Publication to which the submission has been transferred. For use in a letter configured for the 'Author Agrees to Transfer Submission' event.
- **%AUTHOR_TRANSFER_REMIND_COUNT%** - Inserts the number of revision reminder letters that the Author has been sent for this submission/revision. For use in Author Reminder letters.
- **%AUTHOR_TRANSFER_REMIND_DATE%** - Inserts the date that the last revision reminder letter was sent to the Author. For use in Author Reminder letters.

- **%TRANSFERRED_REVIEWS%** - Inserts all eligible reviews for all versions of a transferred submission, similar to the way the information appears on the 'Transferred Information' page. Available for use in all letters associated with EM to EM Transfers (Portal and non-Portal). May be used in the 'Transfer Letter' that is deposited in the sending and receiving publication site, in letters sent to any Editor in the Editor Chain on the receiving site, and in Reviewer Invitations on the receiving site.

- **%AGREE_TO_TRANSFER%** - Inserts a hyperlink, which when clicked, fully logs the Author in and delivers him to the 'Transfer Submission to a Different Publication' page, where he can select the publication to which he wishes to have his paper transferred.
- **%DECLINE_TO_TRANSFER%** - Inserts a hyperlink, which when clicked, delivers the Author to the 'Decline to Transfer Confirmation' page, and automatically sets the Final Disposition if the submission to 'Reject'.

Fun Transfer Facts!

There is an Author Reminder report for transfers:

Author Reminder Reports
Co-Author Reminder Report
Author Revision Status Report
Author Revision Reminder Report
Automated Author Revision Reminder Report
Automated Author Transfer Reminder Report

There is a Transferred Reviews view in EAR

Suggest Reviewer Preferences Table
Suggested/Opposed Reviewers
Target Publication Info.
Technical Check Events
Technical Check History
Transferred Reviews View ←
Transmittal Form History
Transmittal Form Tracking Information
Transmittal Status
Unavailability Dates Table