



Welcome to
EMUG 2016

 Editorial Manager®  ProduXion Manager®

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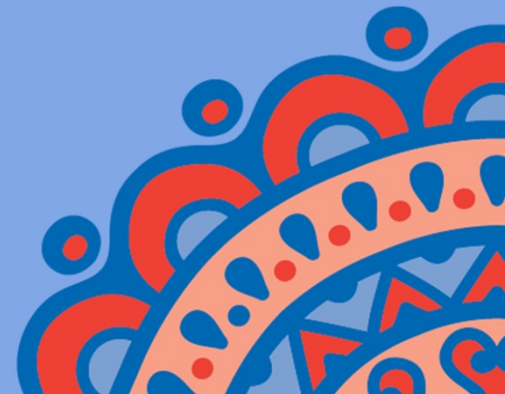

Publish Faster. Publish Smarter.

that...
< Lat. *edere*, to publish,
ed·i·tor (ĕd'ī-tər)
One who writes edit
basically of a splier
in edit text or

<http://bit.ly/1PkAi0A>

Editor Assignment Options

Sally Ubnoske, Senior Business Systems Analyst
subnoske@ariessys.com



Agenda

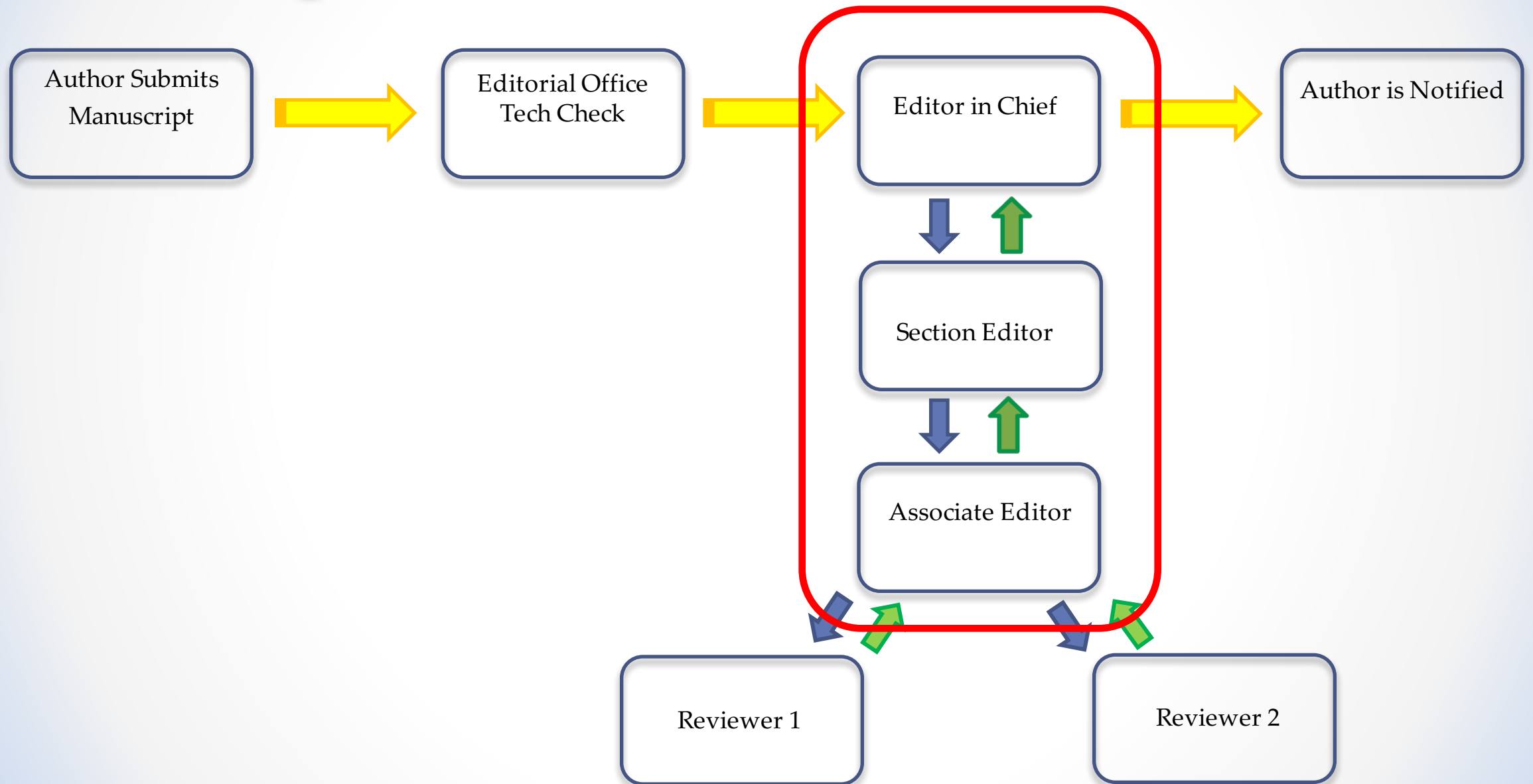
- Editor Chains – Overview
- Assigning Submissions to Editors
 - Classic Method
 - Assign Editor Chain
 - Modify Editor Chain
 - Automatic Editor Assignment (Direct-to-Editor)
 - Suggest Editor
- Blinding Editors on a Submission
- Questions

Agenda

❖ Editor Chains – Overview

- Assigning Submissions to Editors
 - Classic Method of Editor Assignment
 - Assign Editor Chain
 - Modify Editor Chain
 - Automatic Editor Assignment (Direct-to-Editor)
 - Suggest Editor
- Blinding Editors on a Submission
- Questions

Sample Peer Review Workflow



Editor Chains

- New and revised submissions must be assigned to an Editor for peer review
- Each assigned Editor may choose to handle the submission or assign it to another Editor, depending on permissions
- The resulting chain of responsibility dictates the order in which Editors make decisions on the submission



Editor Chains

- Terms used to describe an Editor's relationship with a submission
 - **Attached Editor** – Editor who first assigns the manuscript to an Editor
 - **Handling Editor** – Editor with current responsibility
 - **First Editor** – Editor who was first assigned to the submission
 - **Assigned Editor** – any Editor who is assigned to the submission and is in the list of Editors on the *Details* page
 - **Lower-Level Editor** – any Editor assigned after the Editor in question
 - **Upper-Level Editor** – any Editor assigned before the Editor in question
 - **Corresponding Editor** – the first Editor, unless setting follows the Editor Chain
 - **Handling Editor may** (depending on RoleManager permissions):
 - Assign another Editor
 - Invite Reviewers
 - Submit Decision and Comments

Editor Chains

- Editors get assigned to submissions through:
 - **Assignment** - Editors can be assigned to papers, without being given the opportunity to decline the assignment
 - **Invitation** - Editors are invited to take on an assignment. The Editor must agree or decline to take the assignment.
- Whether an Editor is invited or assigned is configurable per Editor Role
- When an Editor accepts an invitation or is assigned, the new assignment is displayed in the Editor's 'New Assignments' folder
- Editors can receive letters configured for the following events:
 - Editor Assigned (Not Invited)
 - Editor Invited for Assignment
 - Editor Agree to Assignment
 - Editor Declines Invitation of New Submission
 - Editor Declines Invitation from an Editor

Agenda

- Editor Chains – Overview
- Assigning Submissions to Editors

❖ Classic Method

- Assign Editor Chain
- Modify Editor Chain
- Automatic Editor Assignment (Direct-to-Editor)
- Suggest Editor
- Blinding Editors on a Submission
- Questions

Classic Method

Editor 'To-Do' List

My Pending Assignments (48)

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



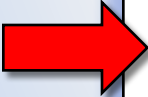
Quicklinks

New Submissions Requiring Assignment - Sally Editor, PhD

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

Page: 1 of 2 (20 total submissions) 1 2 ▶▶

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Current Status	Status Date
View Submission Duplicate Submission Check (...) Details ▾ Initiate Discussion History File Inventory Edit Submission Send Back to Author Remove Submission Classifications Assign Editor Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions	SALLYDEV130-D-16-00068	Original Study	EMUG 2016 - Editor Assignment Options	Buzz Lightyear Aldrin PhD 🟢 🟡 !	May 5 2016 4:28PM	Submitted to Journal	May 5 2016 4:28PM



Classic Method

Assign Editor

Manuscript Number: SALLYDEV130-D-16-00068

Title: EMUG 2016 - Editor Assignment Options

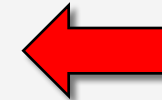
Use the search tool to identify the most appropriate person to handle this submission.

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

[Insert Special Character](#)

[Value Options](#)

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



The Editorial Office searches for an Editor . . .



Classic Method

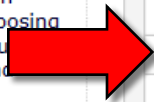
Assign Editor

Manuscript Number: SALLYDEV130-D-16-00068

Title: EMUG 2016 - Editor Assignment Options

The following have been identified as candidates to edit this submission. Select the one you want and send them either the default editor assignment letter or a customized letter.

One or more notification letters may be configured to be sent when an editor is assigned or invited. Choosing 'Send Custom Letters' allows you choose which letters are sent and customize those letters as appropriate. Choosing 'Send Default Letters' will send the default letters as configured, bypassing the selection and customization process.



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

Page: 1 of 1 (7 total People Matches) Display results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Associate Editor	Harry Editor ▾	3	0		Yes
<input type="radio"/>	Editor in Chief	Chief Editor ▾	9	0		Yes
<input type="radio"/>	Managing Editor	Ed J Editor, MD ▾	2	0		Yes
<input checked="" type="radio"/>	Managing Editor	Sally Editor, PhD ▾	30	0		Yes
<input type="radio"/>	Section Editor	David Editor ▾	14	0		Yes
<input type="radio"/>	Section Editor	John Editor ▾	7	0		Yes
<input type="radio"/>	Section Editor	Michael Editor ▾	21	0		Yes

Page: 1 of 1 (7 total People Matches) Display results per page.

... selects an Editor and sends a customized or default letter

Classic Method

New Editor Assignments - Sally Editor, PhD

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

Page: 1 of 1 (3 total submissions)

Action	Manuscript Number	Article Type	Section/Category	Article Title	Current Status
<ul style="list-style-type: none">View SubmissionDuplicate Submission Check (...)Details ▾Initiate DiscussionHistoryFile InventoryEdit SubmissionClassificationsUnassign EditorAssign EditorInvite ReviewersSolicit CommentarySet Final DispositionInitiate ProductionSimilar Articles in MEDLINESubmit Editor's Decision and CommentsSend E-mailLinked Submissions	SALLYDEV130-D-16-00068	Original Study		EMUG 2016 - Editor Assign Options	2016 4:49PM With Editor

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

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

The assigned Editor can assign the manuscript to another Editor or handle it herself

RoleManager - Editor

Edit Role Definition

Role Name:*

Maximum Role name is 40 characters.

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

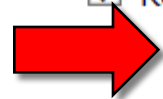
[Expand All](#)

[Collapse All](#)

New Submissions

Editor Assignment

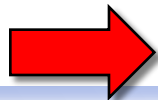
Receive Assignments in 'New Assignments' Folder



Receive Assignments without Invitation

Receive Invitations for Assignments

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



Assign Editor

Permissions for the Classic Method

RoleManager - Editor

Edit Role Definition

Role Name:*

Maximum Role name is 40 characters.

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

[Expand All](#)

[Collapse All](#)

New Submissions

Editor Assignment

Receive Assignments in 'New Assignments' Folder

Receive Assignments without Invitation

Receive Invitations for Assignments

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

Assign Editor

Permissions for the Classic Method

Agenda

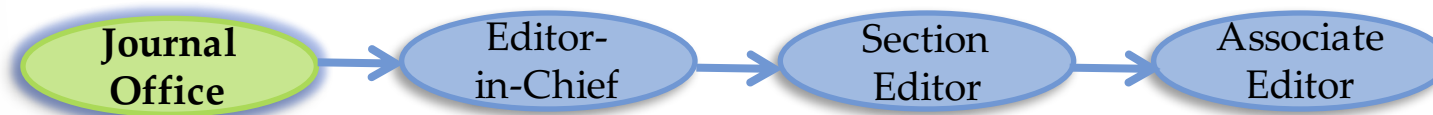
- Editor Chains – Overview
- Assigning Submissions to Editors
 - Classic Method

❖ Assign Editor Chain

- Modify Editor Chain
- Automatic Editor Assignment (Direct-to-Editor)
- Suggest Editor
- Blinding Editors on a Submission
- Questions

Assign Editor Chain

- Most publications use the same sequence of Editor Assignments to create an Editor Chain
- Some publications rely on the Editorial Office to create the Chain
- Using the Classic Method, the EO must proxy in for each Editor to build the complete Editor Chain



- The 'Assign Editor Chain' feature allows publications to create the complete Editor Chain in one action
- Multiple Editor Chain Templates can be created and configured by Article Type

Assign Editor Chain

Quicklinks

New Submissions Requiring Assignment - Sally Editor, PhD

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

Page: 1 of 2 (20 total submissions)

1 2 ▶▶

10 results per page. ⚙

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Current Status	Status Date
<ul style="list-style-type: none">View SubmissionDuplicate Submission Check (...)Details ▾Initiate DiscussionHistoryFile InventoryEdit SubmissionSend Back to AuthorRemove Submission ClassificationsAssign Editor ←Set Final DispositionInitiate ProductionSimilar Articles in MEDLINESend E-mailLinked Submissions	SALLYDEV130-D-16-00069	Original Study	Assign Editor Chain for EMUG 2016	Buzz Lightyear Aldrin PhD ▾ !	May 6 2016 10:56AM	Submitted to Journal	May 6 2016 10

The EO clicks the Assign Editor link . . .

Assign Editor Chain

Assign Editor Chain

Manuscript Number:
SALLYDEV130-D-16-00069

Title: Assign Editor Chain for EMUG 2016

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

Assign Individual Editor

Define Initial Editor Assignment Chain

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

Associate Editor

Add to Chain

Cancel

Create Chain and Send Letters

The template configured for the Article Type is displayed

Assign Editor Chain

1. Choose a *Role*

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

Associate Editor ▼

2. Choose a *user* with selected Role

Editor
▼
Editor Chief
Wayne John
Editor Search

3. Select and customize letter

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

Assign Editor Chain

Define Initial Editor Assignment Chain

	Step	Role	Editor	Assignment Letter
	Editor 1	Editor in Chief	Editor Chief	Editor Assignment Customize
	Editor 2	Section Editor	Editor Michael	Editor Assignment Customize
	Editor 3	Associate Editor	Editor Search	Editor Invitation Customize

Associate Editor

Add to Chain

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

How an Editor is located is defined by the Editor Role

Assign Editor Chain

Assign Editor Chain: Select

Manuscript Number: SALLYDEV130-D-16-00069

Title: Assign Editor Chain for EMUG 2016

The following have been identified as candidates for this Step in the Editor Chain. Select the Editor to return the Assign Editor Chain page where you can select and customize the Assignment Letter, if appropriate.

Editor 3: Associate Editor

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

Cancel

Assign Selected Editor

Search Again

Page: 1 of 1 (1 total People Matches)

Display 10 results per page.

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

Page: 1 of 1 (1 total People Matches)

Display 10 results per page.

Search Again

Cancel

Assign Selected Editor

Assign Editor Chain

Assign Editor Chain

Manuscript Number:
SALLYDEV130-D-16-00069

Title: Assign Editor Chain for EMUG 2016

Select the correct Editor to be used at each step in the assignment chain. You may add and remove steps, change Roles and select Editors to customize the chain. On confirming the chain by clicking 'Create Chain and Send Letters', the system will create assignments for each Editor in the chain, sending the selected letter to each; the final Editor will be the Handling Editor.

Assign Individual Editor

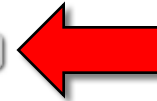
Define Initial Editor Assignment Chain

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

Associate Editor

Cancel

Create Chain and Send Letters



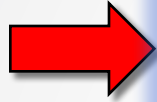
- [Create Chain and Send Letters] to create Chain
- [Assign Individual Editor] to revert to Classic Method

Assign Editor Chain

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

The Editor Chain is created and displayed on *Details*

Assign Editors for Revision



Reassign Editors

Manuscript Number:
SALLYDEV130-D-16-00069R1

Title: Assign Editor Chain for EMUG 2016

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

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

Edit this Chain

Create a New Chain

Assign Individual Editor

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

Cancel

Reassign with Custom Letter

Reassign with Default Letter

Cancel

Reassign with Custom Letter

Reassign with Default Letter

Edit this Chain

Create a New Chain

Assign Individual Editor

Options when assigning Editors for a Revision

PolicyManager Main Menu

PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

Registration and Login Policies

Status Policies

Submission Policies

Questionnaire Policies

Additional Data Policies

Editor Assignment Policies

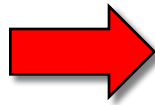
[Set Editor Assignment Options](#)

[Define Editor Assignment Chain Templates](#)

[Set Editor Rotation Participants](#)

[Edit Instructions on Modify Editor Chain Page](#)

[Configure Automated Summary Reminders](#)



Add Editor Assignment Chain Template

Define Editor Assignment Chain Templates

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

Current Editor Assignment Chain Template List

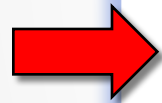
+ Add Another Editor Assignment Chain Template

There are currently no Editor Chain Templates in the list

+ Add Another Editor Assignment Chain Template

Close

[Edit Article Types](#)





Click '+ Add Another Assignment Chain Template' to add an 'Assignment Chain Template'

Add Editor Assignment Chain Template

Define Editor Assignment Chain Templates

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

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

Click the pencil icon  to edit an 'Assignment Chain Template'

Edit Editor Assignment Chain Template

Define Editor Assignment Chain Templates

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

Current Editor Assignments

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

+ Add Another Editor

Edit Editor Assignment Chain Template Details

Standard Three Editor Chain

Open Special Character Palette

Description* Standard Three Editor Chain

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

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

Add to Chain

types

Select 'Assignment Chain Template' per AT


Editor Parameters	New and Revised Submissions
Editor Assignment Chain Template:	<div style="border: 1px solid black; padding: 2px;"><p>None</p><p>Standard Three Editor Chain</p><p>Two Editor Chain for Rapid Reports</p><p>Three Editor Chain for Invited Submissions</p><p>Two Editor Chain for Rapid Communications</p></div>
Reviewer Parameters:	New and Revised Submissions
Submissions will move to the 'Submissions with Required Reviews Complete' folder as soon as this number of reviews have been completed.	<input type="text" value="2"/>

Select a default template for the Article Type

Set Editor Assignment Options

PolicyManager Main Menu

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

- Registration and Login Policies**
- Status Policies**
- Submission Policies**
- Questionnaire Policies**
- Additional Data Policies**
- Editor Assignment Policies**
 - [Set Editor Assignment Options](#) 
 - [Define Editor Assignment Chain Templates](#)
 - [Set Editor Rotation Participants](#)
 - [Edit Instructions on Modify Editor Chain Page](#)
 - [Configure Automated Summary Reminders](#)
- Reviewer and Editor Form Policies**

Configure 'Editor Assignment Chain' for Revisions

Set Editor Assignment Options

Set Editor Assignment Options

New Submissions

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

If "Assign to Editors by Rotation" is selected, the submissions are automatically directed to the Editor selected by the Author at the 'Request Editor' manuscript submission step.

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

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

Revised Submissions

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

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

- Revisions go to *Revised Submissions* or *Revised Submissions Requiring Assignment* folder
 - Allow reassignment to previous Editors
 - Letter:
- Revisions are automatically directed to the First Assigned Editor of the previous version.

Agenda

- Editor Chains – Overview
- Assigning Submissions to Editors
 - Classic Method
 - Assign Editor Chain

❖ **Modify Editor Chain**

- Automatic Editor Assignment (Direct-to-Editor)
- Suggest Editor
- Blinding Editors on a Submission
- Questions

Modify Editor Chain

- Editors may be removed or replaced for any step of the Editor Chain
- An Editor who has saved or submitted a decision can be replaced by another Editor with the **same Role**
- Under certain conditions, an Editor may be replaced by another Editor with a **different Role**
- Default or customized letters may be sent
- Replacement Editors inherit the history of the Editor they have replaced
- Modifications to the Editor Chain are visible on the Custom **Details** page, the **History** page and in Reports



Modify Editor Chain

- Options depend on:
 - The logged-in user's *RoleManager* permission
 - The logged-in user's relationship to the submission and position in the Chain
 - Whether the Editor to be modified has saved or submitted a decision

Modify Editor Chain

- Options also depend on:
 - Whether there are any unprocessed reviews
 - Whether another Editor in the Chain has submitted a decision
 - Whether another Editor in the Chain can still submit a decision



Modify Editor Chain

- **Unprocessed Review** – an invitation, open review or a review that has been completed since the ‘Last Good Decision’ was submitted
- **Last Good Decision** - a decision where the Editor was not [Skipped] or [Terminated]. This is a decision where an Editor has clicked on the ‘Submit Editors Decision and Comments’ link



WORK IN PROGRESS



EM keeps track of the rules so you don't have to!

Modify Editor Chain

View All Assigned Submissions - Sally Editor, PhD

Contents: This page lists all submissions that have been assigned to an Editor, for which the Editor's decision has not yet been made. This includes submissions with invited Reviewer comments, submissions out for review, submissions requiring a decision, and submissions which have a subordinate Editor's decision but not a decision from the top Editor in the decision-making chain.

Page: 1 of 1 (57 total submissions)

Display 100 results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor with Current Responsibility	Review Status
View Submission Duplicate Submission Check (...) Details History Classifications Unassign Editor File Inventory Edit Submission Invite Reviewers Solicit Commentary Notify Editor Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions	SALLYDEV130-D-16-00076	Original Study		Modifying the Editor Chain is Easy!	Buzz Lightyear Aldrin PhD	May 19 2016 2:46PM	May 19 2016 2:47PM	With Editor	Harry Editor	

Click 'Unassign Editor' to modify the Chain

Modify Editor Chain

Modify Editor Chain

[View Reviews and Comments](#)

Manuscript Number:
SALLYDEV130-D-16-00076

Title: Modifying the Editor Chain is Easy!

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

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	Sally Editor, PhD Managing Editor	Managing Editor	Editor Search
	Editor 2	Michael Editor Section Editor	Section Editor	
	Editor 3	Harry Editor (Revise) Associate Editor	Associate Editor	

Allen Josh
Author Stephen
Editor David
Editor John

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

Harry Editor (Revise) Associate Editor	Associate Editor	Editor Search
--	------------------	---------------

Modifications depend on the submission's state, the logged-in user's permissions, and whether the Chain can be completed

Modify Editor Chain

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	Sally Editor, PhD Managing Editor	Managing Editor <input type="text" value="Managing Editor"/>	Editor Search
	Editor 2	Michael Editor Section Editor	Section Editor <input type="text" value="Section Editor"/>	<input type="text"/>
	Editor 3	Harry Editor Associate Editor (Revise)	Associate Editor	Editor Search

Cancel

Confirm Selections and Send Default Letters

Confirm Selections and Send Custom Letters

- Assign Editor
- Redirect to Other Editor (and be removed from Editor Chain)
- Change Corresponding Editor
- Blind Editor
- Unassign Other Editors
- Unassign Myself
 - Unassign Subordinate Editors
 - Replace Editor

Sally Editor can replace or remove her own assignment and remove or replace any subordinate Editor regardless of whether she is in the Chain

Modify Editor Chain

Current Editor Assignment Chain

	Step	Assigned Editor	Role	New Editor
	Editor 1	Sally Editor, PhD Managing Editor	Managing Editor	This Editor cannot be replaced
	Editor 2	Michael Editor Section Editor	Section Editor <input type="text" value="Section Editor"/>	<input type="text" value=""/>
	Editor 3	Harry Editor Associate Editor (Revise)	Associate Editor	Editor Search

Cancel

Confirm Selections and Send Default Letters

Confirm Selections and Send Custom Letters

- Unassign Other Editors
- Unassign Myself
- Unassign Subordinate Editors
- Replace Editor

Michael Editor can replace or remove his own assignment and remove or replace a subordinate Editor

Modify Editor Chain

Current Editor Assignment Chain

Step	Assigned Editor	Role	New Editor
Editor 1	Sally Editor, PhD Managing Editor	Managing Editor	This Editor cannot be replaced
Editor 2	Michael Editor Section Editor	Section Editor	This Editor cannot be replaced
Editor 3	Harry Editor Associate Editor (Revise)	Associate Editor	Editor Search

Cancel

Confirm Selections and Send Default Letters

Confirm Selections and Send Custom Letters

- Unassign Other Editors
- Unassign Myself
- Unassign Subordinate Editors
- Replace Editor

Harry Editor can only replace his own assignment because he has submitted a decision - he cannot remove or replace another Editor in the Chain

Modify Editor Chain

Editor Search

Manuscript Number:
SALLYDEV130-D-16-00076

Title: Modifying the Editor Chain is Easy!

Use the search tool to identify the most appropriate person for this step in the chain.

Editor 3: Associate Editor

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

[Insert Special Character](#)

[Value Options](#)

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

Since Harry Editor has submitted a decision a replacement Editor must have the same Role

Modify Editor Chain

Search Again

Page: 1 of 1 (7 total People Matches)

Display 10 results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
<input type="radio"/>	Associate Editor	Tony Alves	0	0		Yes
<input type="radio"/>	Associate Editor	Susan Author	1	0		Yes
<input type="radio"/>	Associate Editor	Charlie Snoopy Brown, PhD	0	0		Yes
<input type="radio"/>	Associate Editor	James Duncan	0	0		Yes
<input type="radio"/>	Associate Editor	Harry Editor	3	0		Yes
<input checked="" type="radio"/>	Associate Editor (This Editor is being unassigned)	Richard Feynman, PhD	0	0		Yes
<input type="radio"/>	Associate Editor	Eddie Munster	0	0		Yes

Page: 1 of 1 (7 total People Matches)

Display 10 results per page.

Search Again

Cancel

Submit

Select a replacement Editor and click [Submit]

Modify Editor Chain

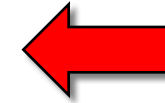
Current Editor Assignment Chain

Step	Assigned Editor	Role	New Editor
Editor 1	Sally Editor, PhD Managing Editor	Managing Editor	This Editor cannot be replaced
Editor 2	Michael Editor Section Editor	Section Editor	This Editor cannot be replaced
Editor 3	Harry Editor Associate Editor (Revise)	Associate Editor	Richard Feynman, PhD [Search]

Cancel

Confirm Selections and Send Default Letters

Confirm Selections and Send Custom Letters



The Editor can send Default or Custom Letters



Modify Editor Chain

Editor 3

Editor Being Unassigned

Name	Letter		Do Not Send Letter
Harry Editor (Associate Editor)	Editor Notice an Assignment was Undone ▼	Customize	<input type="checkbox"/>

Editor Being Assigned (Switched To)

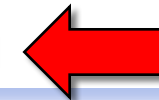
Name	Letter		Do Not Send Letter
Richard Feynman, PhD (Associate Editor)	Editor Assignment ▼	Customize	<input type="checkbox"/>

Others Notified of Editor Unassignment

Name	Letter		Do Not Send Letter
Sally Editor, PhD (Managing Editor)	Editor Notice an Assignment was Undone ▼	Customize	<input type="checkbox"/>
Michael Editor (Section Editor)	Editor Notice an Assignment was Undone ▼	Customize	<input type="checkbox"/>

Cancel

Confirm Selections and Send Letters



Modify Editor Chain

Blinded Editors:		Blinded Editors	
		Editors Top	
Name:	Sally Editor, PhD	<input type="checkbox"/>	[Proxy]
Role:	Managing Editor		
Date Assigned:	May 19 2016 2:48PM		
Date Completed:			
Elapsed Days:	0		
Recommendation:			
<hr/>			
Name:	Michael Editor	<input type="checkbox"/>	[Proxy]
Role:	Section Editor		
Date Assigned:	May 19 2016 2:48PM		
Date Completed:			
Elapsed Days:	0		
Recommendation:			
<hr/>			
Name:	Richard Feynman, PhD	<input type="checkbox"/>	[Proxy] (Replaced Harry Editor)
Role:	Associate Editor		
Date Assigned:	May 19 2016 2:48PM		
Date Completed:	May 19 2016 2:54PM		
Elapsed Days:	0		
Recommendation:	Revise		

Agenda

- Editor Chains – Overview
- Assigning Submissions to Editors
 - Classic Method
 - Assign Editor Chain
 - Modify Editor Chain

❖ Automatic Editor Assignment

- Suggest Editor
- Blinding Editors on a Submission
- Questions

Automatic Editor Assignment

(Direct-to-Editor)

- For Publications that do not have a central editorial office
- Optimized for groups of Editors who work independently
- Allows Editors to control and monitor most aspects of the peer review process on their own



Automatic Editor Assignment

- Direct-to-Editor – submissions are automatically pushed to Editors
- Submission are not ‘assigned’ to an Editor – they land in the ‘Direct-to-Editor’ folder
- Editors either assign themselves or redirect to another Editor
- Editors manage correspondence and the peer review process
- Editors share the Reviewer database

Automatic Editor Assignment

- Three methods for Direct-to-Editor:
 - Author selects Editor during the 'Submit Manuscript' process
 - Author selects a Section/Category – associated with an Editor – during the 'Submit Manuscript' process
 - Editors are assigned on a rotating basis
- Revisions can be sent directly to the first assigned Editor of the previous version
 - Does not require Direct-to-Editor

Automatic Editor Assignment

Submission

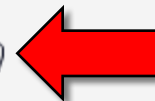
- ✓ Select Article Type
- ✓ Enter Title
- Add/Edit/Remove Authors
- ✓ Funding Information
- ✓ Submit Abstract
- Enter Keywords
- Select Classifications
- ✓ Additional Information
- Enter Comments
- Suggest Reviewers
- Oppose Reviewers
- ➔ Request Editor
- Select Region of Origin
- ✓ Attach Files

Request an Editor

You may Request an Editor to be assigned to your paper. The request will be taken under advisement by the Journal Office. If you do not Request an Editor, your manuscript will be assigned to the appropriate Editor(s) as determined by the Journal Staff.

Please Choose

- No Request
- Sally Editor, Managing Editor
- Ed J Editor, Managing Editor
- Caroline Webber, Managing Editor
- Michael Editor, Section Editor
- Stephen Author, Section Editor
- John Editor, Section Editor
- David Editor, Section Editor
- Josh Allen, Section Editor
- Chief Editor, Editor in Chief
- John Wayne, Editor in Chief
- Charles DuBois, Conference Editor
- Susan Author, Associate Editor
- Richard Feynman, Associate Editor
- Charlie Snoopy Brown, Associate Editor
- Eddie Munster, Associate Editor
- James Duncan, Associate Editor
- Harry Editor, Associate Editor
- Tony Alves, Associate Editor



Automatic Editor Assignment

Editor 'To-Do' List

- My Pending Assignments (54)
 - Editorial Submissions in Progress (2)
 - Transferred Submissions (1)
 - New Submissions Requiring Assignment (24)
 - Revised Submissions Requiring Assignment (4)
 -  Direct-to-Editor New Submissions (1)
 - Submissions Needing Approval by Editor (2)
 - Submissions Sent Back to Author for Approval (2)
 - Incomplete Submissions (8)
 - New Assignments (2)
 - Submissions with Rescinded Decision (1)
 - Submissions with Required Reviews Complete (0)
 - Submissions Requiring Additional Reviewers (6)
 - Submissions with One or More Late Reviews (0)
 - Submissions with Active Discussions (1)
- Reviews in Progress (0)
 - Reviewers Invited - No Response (0)
 - Submissions Under Review (0)

The submitted paper moves to the Editor's 'Direct-to-Editor New Submissions' folder

Automatic Editor Assignment

Direct-to-Editor New Submissions - Sally Editor, PhD

Contents: These are the new submissions that have been automatically directed to you. Clicking "Assign to Myself" transfers the submission to your New Assignment chain and allows you to redirect the submission to a different Editor. Click the up/down arrows under the column names to change the sort order.

Page: 1 of 1 (1 total submissions)

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼	Aut Name ▲▼
View Submission Duplicate Submission Check (...) Details ▾ Initiate Discussion History Classifications File Inventory Edit Submission Remove Submission Send Back to Author Redirect to Other Editor Assign to Myself Set Final Disposition Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions	SALLYDEV130-D-16-00077	Original Study		Direct-to-Editor helps journals that do not have a central editorial office	Buzz

Page: 1 of 1 (1 total submissions)

Action ▲

[View Submission](#)
[Duplicate Submission Check \(...\)](#)
[Details ▾](#)
[Initiate Discussion](#)
[History](#)
[Classifications](#)
[File Inventory](#)
[Edit Submission](#)
[Remove Submission](#)
[Send Back to Author](#)
[Redirect to Other Editor](#)
[Assign to Myself](#)
[Set Final Disposition](#)
[Initiate Production](#)
[Similar Articles in MEDLINE](#)
[Send E-mail](#)
[Linked Submissions](#)

The Editor can click:

- 'Assign to Myself' or
- 'Redirect to Other Editor'

Automatic Editor Assignment

New Editor Assignments - Sally Editor, PhD

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

Page: 1 of 1 (3 total submissions)

Display results per page.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Decision
View Submission Duplicate Submission Check (...) Details Initiate Discussion History File Inventory Edit Submission Classifications Unassign Editor Assign Editor Invite Reviewers Solicit Commentary Set Final Disposition Initiate Production Similar Articles in MEDLINE Submit Editor's Decision and Comments Send E-mail Linked Submissions	SALLYDEV130-D-16-00077	Original Study		Direct-to-Editor helps journals that do not have a central editorial office	Buzz Lightyear Aldrin, PhD	May 20 2016 11:32AM	May 24 2016 12:24PM	With Editor	

The submission is now in the Editor's 'New Assignments' folder



Automatic Editor Assignment

Assign to Editors

PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

Registration and Login Policies

Status Policies

Submission Policies

Questionnaire Policies

Additional Data Policies

Editor Assignment Policies

[Set Editor Assignment Options](#)

[Define Editor Assignment Chain Templates](#)

[Set Editor Rotation Participants](#)

[Edit Instructions on Modify Editor Chain Page](#)

[Configure Automated Summary Reminders](#)

Set Editor Assignment Options

New Submissions

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

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

Submissions go to *New Submissions Requiring Assignment* folder

Except:

Submissions where Author has selected an Editor

Please also configure settings on the 'Set Request or Assign Editor Display Options' page.

Submissions where Author has selected a Section/Category

Please also assign Editors to sections on the 'Edit Sections/Categories' page.

Assign to Editor by Rotation

Please also select Editors on the 'Set Editor Rotation Participants' page.

By Author Request
or Section/Category

Automatic Editor Assignment

Assign to Editors

PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

Registration and Login Policies

Status Policies

Submission Policies

Questionnaire Policies

Additional Data Policies

Editor Assignment Policies

[Set Editor Assignment Options](#)

[Define Editor Assignment Chain Templates](#)

[Set Editor Rotation Participants](#)

[Edit Instructions on Modify Editor Chain Page](#)

[Configure Automated Summary Reminders](#)

Set Editor Assignment Options

New Submissions

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

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

Submissions go to *New Submissions Requiring Assignment* folder

Except:

Submissions where Author has selected an Editor
Please also configure settings on the 'Set Request or Assign Editor Display Options' page.

Submissions where Author has selected a Section/Category
Please also assign Editors to sections on the 'Edit Sections/Categories' page.

Assign to Editor by Rotation
Please also select Editors on the 'Set Editor Rotation Participants' page.

By rotation

Automatic Editor Assignment

PolicyManager Main Menu

Expand All

Collapse All

+ Registration and Login Policies

+ Status Policies

- Submission Policies

Edit Article Types

Edit Submission Items

Configure Color Codes for Companion Files

Edit Sections/Categories

Set Classifications Display Policy

Edit Classifications

Edit Request Authenticated ORCID iD Instructions

Define PDF Cover Page Layouts

Configure PDF Watermarks

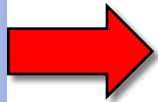
Select Author's Reviewer Preferences

Set Request Editor or Assign Editor Display Options

Edit Manuscript Geographic Region of Origin

Edit Manuscript Submission Instructions

Configure Instructions for New Submission Redirect



Select the Editors

Set Request or Assign Editor Display Options

Select the Editor Roles that are eligible to be requested by an Author.

If you want to specify automatic assignment to Editors by Name, Role, or Description, you must also select the appropriate option on the 'Set Editor Assignment Options' page in PolicyManager.

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

Select the amount of information to be displayed to Authors on the Request Editor page.



Display Editor Name and Role Title

Cancel

Submit

for Authors to request

Agenda

- Editor Chains – Overview
- Assigning Submissions to Editors
 - Classic Method
 - Assign Editor Chain
 - Modify Editor Chain
 - Automatic Editor Assignment (Direct-to-Editor)

❖ Suggest Editor

- Blinding Editors on Some Submissions
- Questions

Suggest Editor

- Designed for publications with:
 - High volume
 - Large Editor pool
 - Broad range of subject disciplines
- System suggests Editor candidates to handle submissions
- An Editor queue is generated based on a set of criteria
- The list can be sorted and modified
- The first invitations are sent immediately
- Enabled by an Aries Account Coordinator

Suggest Editor

- Remaining Editors in the queue are automatically invited until :
 - An Editor accepts the invitation OR
 - All invitations have been sent



Suggest Editor

- The field of Editor candidates can be narrowed based on Classification matches
- Personal Classification Rankings are used to sort by Relevance Ranking
 - Low = 1 point
 - Medium = 2 points
 - High = 3 points



Suggest Editor

- Classification matches are used if the Personal Classification Rankings are not used
- The previously assigned Editor is first on the list for revisions
- Editors requested by the Author are placed at the top of the list
- Publications can list all Editors or display by Classification matches



Suggest Editor

Editor Selection Summary - Manuscript Number SALLYDEV130-D-16-00079 Buzz Lightyear Aldrin, PhD "The "Suggest Editor" feature creates an Editor queue"

[Manuscript Details](#) ▶

Below is a list of suggested candidates based on classification matches with the manuscript. ([more...](#))

Manuscript Classifications	Manuscript Keywords
(1) Abdomen/Gastrointestinal tract; (2) Angiography; (3) Ablation Procedures;	

Search for Editors

[Insert Special Character](#)

[Value Options](#)

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

Candidates

[Select All](#) / [Clear All](#)

Page: 1 of 1 (10 total candidates)

Display results per page.

Select	Invitation Order	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations	Available during next 30 days
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Editor in Chief	Chief Editor ▼	Duke University	6	3	10	3	Yes
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	Section Editor	Stephen Author ▼	Dartmouth College	5	2	2	3	Yes
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	Section Editor	Michael Editor ▼	California Institute of Technology	4	2	22	2	Yes
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	Associate Editor	Charlie Snoopy Brown, PhD ▼	California State Polytechnic University Pomona	4	2	0	0	Yes
<input checked="" type="checkbox"/>	<input type="text" value="5"/>	Editor in Chief	John Wayne ▼	California State Polytechnic University Pomona	3	1	0	0	Yes
<input type="checkbox"/>	<input type="text"/>	Managing Editor	Sally Editor, PhD ▼	University of California Riverside	2	1	31	0	Yes
<input type="checkbox"/>	<input type="text"/>	Section Editor	Josh Allen ▼	MIT	2	1	0	2	Yes
<input type="checkbox"/>	<input type="text"/>	Associate Editor	Eddie Munster ▼		1	1	0	0	Yes
<input type="checkbox"/>	<input type="text"/>	Associate Editor	James Duncan ▼	University of Massachusetts Amherst	1	1	0	0	Yes
<input type="checkbox"/>	<input type="text"/>	Associate Editor	Susan Author ▼		0	0	1	0	Yes

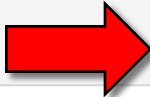
Suggest Editor

Candidates

Select All / Clear All Page: 1 of 1 (10 total candidates) Display 500 results per page.

[Update Invitation Order](#) [Cancel](#) [Customize Letters & Submit Queue](#) [Submit Queue without Customizing Letters](#) [Assign Editor Now](#)

Select	Invitation Order	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations	Available during next 30 days
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Editor in Chief	Chief Editor ↕	Duke University	6	3	10	3	Yes
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	Section Editor	Stephen Author ↕	Dartmouth College	5	2	2	3	Yes
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	Section Editor	Michael Editor ↕	California Institute of Technology	4	2	22	2	Yes
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	Associate Editor	Charlie Snoopy Brown, PhD ↕	California State Polytechnic University Pomona	4	2	0	0	Yes
<input checked="" type="checkbox"/>	<input type="text" value="5"/>	Editor in Chief	John Wayne ↕	California State Polytechnic University Pomona	3	1	0	0	Yes
<input type="checkbox"/>	<input type="text"/>	Managing Editor	Sally Editor, PhD ↕	University of California Riverside	2	1	31	0	Yes
<input type="checkbox"/>	<input type="text"/>	Section Editor	Josh Allen ↕	MIT	2	1	0	2	Yes
<input type="checkbox"/>	<input type="text"/>	Associate Editor	Eddie Munster ↕		1	1	0	0	Yes
<input type="checkbox"/>	<input type="text"/>	Associate Editor	James Duncan ↕	University of Massachusetts Amherst	1	1	0	0	Yes
<input type="checkbox"/>	<input type="text"/>	Associate Editor	Susan Author ↕		0	0	1	0	Yes

[Update Invitation Order](#)  [Cancel](#) [Customize Letters & Submit Queue](#) [Submit Queue without Customizing Letters](#) [Assign Editor Now](#)

The EO can submit the queue with custom or default letters or . . .

Suggest Editor

Candidates

Select All / Clear All

Page: 1 of 1 (10 total candidates)

Display 500 results per page.


Update Invitation Order

Cancel Customize Letters & Submit Queue Submit Queue without Customizing Letters Assign Editor Now

Select	Invitation Order	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations	Available during next 30 days
<input checked="" type="checkbox"/>	1	Editor in Chief	Chief Editor	Duke University	6	3	10	3	Yes
<input type="checkbox"/>		Section Editor	Stephen Author	Dartmouth College	5	2	2	3	Yes
<input type="checkbox"/>		Section Editor	Michael Editor	California Institute of Technology	4	2	22	2	Yes
<input type="checkbox"/>		Associate Editor	Charlie Snoopy Brown, PhD	California State Polytechnic University Pomona	4	2	0	0	Yes
<input type="checkbox"/>		Editor in Chief	John Wayne	California State Polytechnic University Pomona	3	1	0	0	Yes
<input type="checkbox"/>		Managing Editor	Sally Editor, PhD	University of California Riverside	2	1	31	0	Yes
<input type="checkbox"/>		Section Editor	Josh Allen	MIT	2	1	0	2	Yes
<input type="checkbox"/>		Associate Editor	Eddie Munster		1	1	0	0	Yes
<input type="checkbox"/>		Associate Editor	James Duncan	University of Massachusetts Amherst	1	1	0	0	Yes
<input type="checkbox"/>		Associate Editor	Susan Author		0	0	1	0	Yes

Update Invitation Order

Cancel Customize Letters & Submit Queue Submit Queue without Customizing Letters Assign Editor Now



... can select a specific Editor and click 'Assign Editor Now' or ...

Suggest Editor


Search for Editors

Insert Special Character Value Options

(	Criterion	Is/Is not	Selector	Value)
<input type="checkbox"/>	Last Name	is	Begins With	wayne	<input type="checkbox"/>

Page: 1 of 1 (1 total Editor candidates) Display 10 results per page.

Select	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations	Available during next 30 days
<input checked="" type="checkbox"/>	Editor in Chief	John Wayne	California State Polytechnic University Pomona	3	1	0	0	Yes



... can search for a specific Editor and click 'Assign Editor Now'

Suggest Editor

Editor 'To-Do' List

My Pending Assignments (59)

[Editorial Submissions in Progress \(2\)](#)

[Transferred Submissions \(1\)](#)

[New Submissions Requiring Assignment \(24\)](#)

[Revised Submissions Requiring Assignment \(4\)](#)

[Direct-to-Editor New Submissions \(0\)](#)

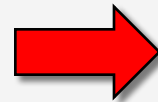
[Submissions Needing Approval by Editor \(2\)](#)

[Submissions Sent Back to Author for Approval \(2\)](#)

[Incomplete Submissions \(8\)](#)

[New Invitations \(0\)](#)

[New Assignments \(3\)](#)



[Editors Invited - None Yet Assigned \(6\)](#)

[Submissions with Rescinded Decision \(1\)](#)

[Submissions with Required Reviews Complete \(0\)](#)

[Submissions Requiring Additional Reviewers \(5\)](#)

[Submissions with One or More Late Reviews \(0\)](#)

[Submissions with Active Discussions \(1\)](#)

Reviews in Progress (0)

[Reviewers Invited - No Response \(0\)](#)

[Submissions Under Review \(0\)](#)

Click 'Editors Invited – None Yet Assigned' to view submissions

Suggest Editor

Quicklinks



Submissions with Editors Invited – None Yet Assigned - Sally Editor, PhD

Page: 1 of 1 (6 total submissions)

1



250 results per page.

Action	Manuscript Number	First Invitation Date	# in Queue	Invitation Status	Last Invitation Date	Article Type	Article Title	Author Name
<ul style="list-style-type: none">View SubmissionDetailsInitiate DiscussionHistoryFile InventoryClassificationsAssign EditorEdit SubmissionSolicit CommentarySet Final DispositionInitiate ProductionSimilar Articles in MEDLINESend E-mail	SALLYDEV130-D-16-00079	May 26 2016 1:41PM	3	2 Open Invitations	May 26 2016 1:41PM	Original Study	The "Suggest Editor" feature creates an Editor queue	Buzz Lightyear Aldrin PhD


Invitation data is displayed in the folder – click 'Assign Editor' to view the queue

Suggest Editor







Invited Editors 

Name	Invitation Status	Date Invited	Date Closed
Chief Editor 	Invited	May 26 2016 01:41PM	
Stephen Author 	Invited	May 26 2016 01:41PM	

(Partial page displayed)

Candidates 

Select All / Clear All Page: 1 of 1 (10 total candidates) Display results per page.

Select	Invitation Order	Editor Role	Editor Name	Institution	Relevance Ranking	Classification Matches	Current Assignments	Open Invitations	Available during next 30 days	Customize Letters
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Section Editor	Michael Editor 	California Institute of Technology	4	2	22	2	Yes	Edit
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	Associate Editor	Charlie Snoopy Brown, PhD 	California State Polytechnic University Pomona	4	2	0	0	Yes	
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	Editor in Chief	John Wayne 	California State Polytechnic University Pomona	3	1	0	0	Yes	
<input type="checkbox"/>	<input type="text"/>	Managing Editor	Sally Editor, PhD 	University of California Riverside	2	1	31	0	Yes	
<input type="checkbox"/>	<input type="text"/>	Section Editor	Josh Allen 	MIT	2	1	0	2	Yes	
<input type="checkbox"/>	<input type="text"/>	Associate Editor	Eddie Munster 		1	1	0	0	Yes	



The *Editor Selection Summary* page displays 'Invited Editors' and the remaining 'Candidates'

Suggest Editor

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**
 - [Customize Suggest Editor Instructions](#)
 - [Configure Suggest Editor Preferences](#)
 - [Configure Editor Reasons for Decline](#)
- Reviewer and Editor Form Policies**
- E-mail and Letter Policies**
- General Policies**
- Discussion Forums**
- Linked Submissions Policies**
- Conference Submission Policies**
- Transmittal Policies**
-  **ProduXion Manager**
-  **Commerce Manager**

System Administrators can configure:

- Suggest Editor Instructions
- Suggest Editor Preferences
- Editor Reasons for Decline

Suggest Editor

Configure Suggest Editor Preferences

Editor Selection Summary Options

Display candidates: By classification matches List all Editors

Number of Editor candidates displayed on page (maximum 300)

Number of candidates selected by default

Number of invitations to be sent immediately when queue is confirmed

Batch Parameters

Turn Off Batch Invitation Process (If this box is selected, Editors in the queue will be automatically promoted when another Editor declines, even if the batch process is turned off.)

Defer first automated batch if within hours of initial invitations sent. If the initial invitations were sent less than this number of hours before the next batch cycle, that cycle is skipped and the next invitations are sent in the following batch cycle.

Number of invitations to send in first batch cycle

Number of days between automated batches *Set this to 0 to send batch invitations nightly (excluding weekends)*

Number of invitations to send in second batch cycle

Number of invitations to send in all subsequent batch cycles

Cancel

Submit

- Criteria used to display candidates
- Number to display
- Number selected by default
- Batch Parameters

Suggest Editor

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

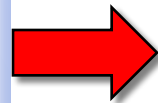
Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

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

New Submissions

Editor Assignment

- Receive Assignments
 - Classic Method of Editor Assignment
 - Receive Assignments without Invitation
 - Receive Invitations for Assignments
- Always Use Search-based selection for Editor Chain Assignment / Replacement (i.e. if not Applied Automatically by System)
- Assign Editor Using Single Editor Selection
- Assign Editor Using Suggested Editor Queue
- Close Queue and Assign Editor Directly



‘Assign Editor Using Suggested Editor Queue’ allows access to the *Editor Selection Summary* page

Suggest Editor

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

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

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

New Submissions

Editor Assignment

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- Assign Editor Using Suggested Editor Queue
- Close Queue and Assign Editor Directly



‘Close Queue and Assign Editor Directly’ allows Editors to close out the queue and assign an Editor directly

Suggest Editor

Enable Personal Classification Rankings by Editor Role

PolicyManager Main Menu

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

- ⊕ [Registration and Login Policies](#)
- ⊕ [Status Policies](#)
- ⊕ [Submission Policies](#)

(Partial page displayed)

- ⊖ [General Policies](#)
 - [Set Manuscript Number Type](#)
 - [Set Manuscript Number Revision Suffix](#)
 - [Set Date Format](#)
 - [Set Time Zone Display Policy](#)
 - [Configure Unavailability Check and Instructions](#)
 - [Set ISO Country Standard](#)
 - [Configure General Due Date Preferences](#)
 - [Set Reviewer Preferences](#)
 - [Configure Electronic Calendar Due Date Preferences](#)
 - [Set Editor Deep Link Expiration](#)
 - [Set Enterprise Analytics Reporting Deep Link](#)
 - [Define Details Page Layouts](#)
 - [Set Update Information Deep Link Expiration](#)
 - [Create Customized Submission Flags](#)
 - [Create Customized People Flags](#)
 - [Edit Production Notes Instructions](#)
 - [Edit Alternate Contact Notes Instructions](#)
 - [Customize Reviewer Selection Summary Instructions](#)
 - [Configure Personal Classification Rankings](#)
 - [Enable Institution Name Normalization](#)

Configure Personal Classification Rankings

When Personal Classification Rankings are enabled for your publication, all users will have the opportunity to select Rankings. You may also select specific Reviewer and/or Editor Roles, *requiring* users with these roles to rank each personal classification they select according to their level of expertise and subject interest.

[Enable Personal Classification Rankings](#)

Select the Reviewer and/or Editor Roles you want to require to Rank Personal Classifications when updating their people data. Note this is not enforced for new user registrations or user login; it is enforced when people are updating their people information. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

- [Associate Editor](#)
- [Conference Editor](#)
- [Editor in Chief](#)
- [Editorial Assistant](#)
- [Managing Editor](#)
- [Section Editor](#)
- [Special Issue Editor](#)
- [Reviewer](#)
- [Statistical Reviewer](#)

[Select All](#)
[Clear All](#)

Enter any instructions that you would like to appear when the Rank Personal Classifications page is displayed.

Please select your level of expertise for each area.

Agenda

- Editor Chains – Overview
- Assigning Submissions to Editors
 - Classic Method
 - Assign Editor Chain
 - Modify Editor Chain
 - Automatic Editor Assignment (Direct-to-Editor)
 - Suggest Editor

❖ Blinding Editors

- Questions

Blinding Editors on Submissions

- Publications can hide submissions from an Editor
- The Editorial Office selects Editors to be blinded from a submission
- Can be done at Editor Assignment or at any time from the *Details* page
- Blinded Editors are not allowed access to any information about that submission

Blinding Editors on Submissions

- Blinding an Editor:
 - Suppresses the submission from all of the Editor's folders
 - Suppresses the submission on the *People Information* page
 - Suppresses the submission from Reminder Reports
 - Suppresses the submission in 'Search All Submissions' results



Blinding Editors on Submissions

Assign Editor Chain: Search

Manuscript Number:
SALLYDEV130-D-16-00078

Title: Publications can Blind Editors on Submissions

Use the search tool to identify the most appropriate person for this step in the chain.

Editor 3: Associate Editor

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

[Blind Editors](#)

Insert Special Character

Cancel

Value Options

(	Criterion	Is/Is not	Selector	Value
▼	Editor Role	is	Equal To	Associate Editor
▼	Last Name	is	Begins With	

Clear

Search

Can Blind Editors while Assigning an Editor ...

... or from the *Details* page at anytime

Details for Manuscript Number SALLYDEV130-D-16-00077 "Direct-to-Editor helps journals that do not have a central editorial office"

Cancel

Save

Save and Close

[Abstract](#) [Manuscript Notes](#) [Production Notes](#) [Editors](#) [Reviewers](#) [Alternate Reviewers](#) [Reviewers Proposed by Editors](#) [Additional Information](#)

Blinded Editors:	Blinded Editors
Additional Manuscript Details:	Add/Edit Additional Manuscript Details
Corresponding Author:	Buzz Lightyear Aldrin, Massachusetts Institute of Technology   Cambridge, MA UNITED STATES [Proxy]
Corresponding Author E-Mail:	subnoske@kfinder.com

Blinding Editors on Submissions

Blind Editor For Manuscript Number SALLYDEV130-D-16-00078

Use the search tool below to identify candidates that should be blocked from access to this submission

Cancel Submit

Search Again

Page: 1 of 1 (7 total People Matches)

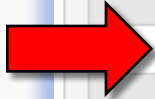
Display 10 results per page.

Blind	Editor Name
<input type="checkbox"/>	Managing Editor: Sally Editor, PhD ▾
<input type="checkbox"/>	Managing Editor: Ed J Editor, MD ▾
<input checked="" type="checkbox"/>	Section Editor: Michael Editor ▾
<input type="checkbox"/>	Section Editor: John Editor ▾
<input type="checkbox"/>	Section Editor: David Editor ▾
<input type="checkbox"/>	Editor in Chief: Chief Editor ▾
<input type="checkbox"/>	Associate Editor: Harry Editor ▾

Page: 1 of 1 (7 total People Matches)

Display 10 results per page.

Search Again

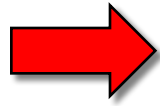


Blinding Editors on Submissions

New Submissions

Editor Assignment

- Receive Assignments in 'New Assignments' Folder
 - Receive Assignments without Invitation
 - Receive Invitations for Assignments
- Always Use Search-based selection for Editor Chain Assignment / Replacement (i.e. if not Applied Automatically by System)
- Assign Editor
- Redirect to Other Editor (and be removed from Editor Chain)
- Change Corresponding Editor
- Blind Editor
- Unassign Other Editors
- Unassign Myself
 - Unassign Subordinate Editors
 - Replace Editor



Editor must have 'Blind Editor' permission to hide submissions from Editors

Agenda

- Editor Chains – Overview
- Assigning Submissions to Editors
 - Classic Method
 - Assign Editor Chain
 - Modify Editor Chain
 - Automatic Editor Assignment (Direct-to-Editor)
 - Suggest Editor
 - Blinding Editors on Some Submissions

 **Questions**

I has a question...



Questions?



