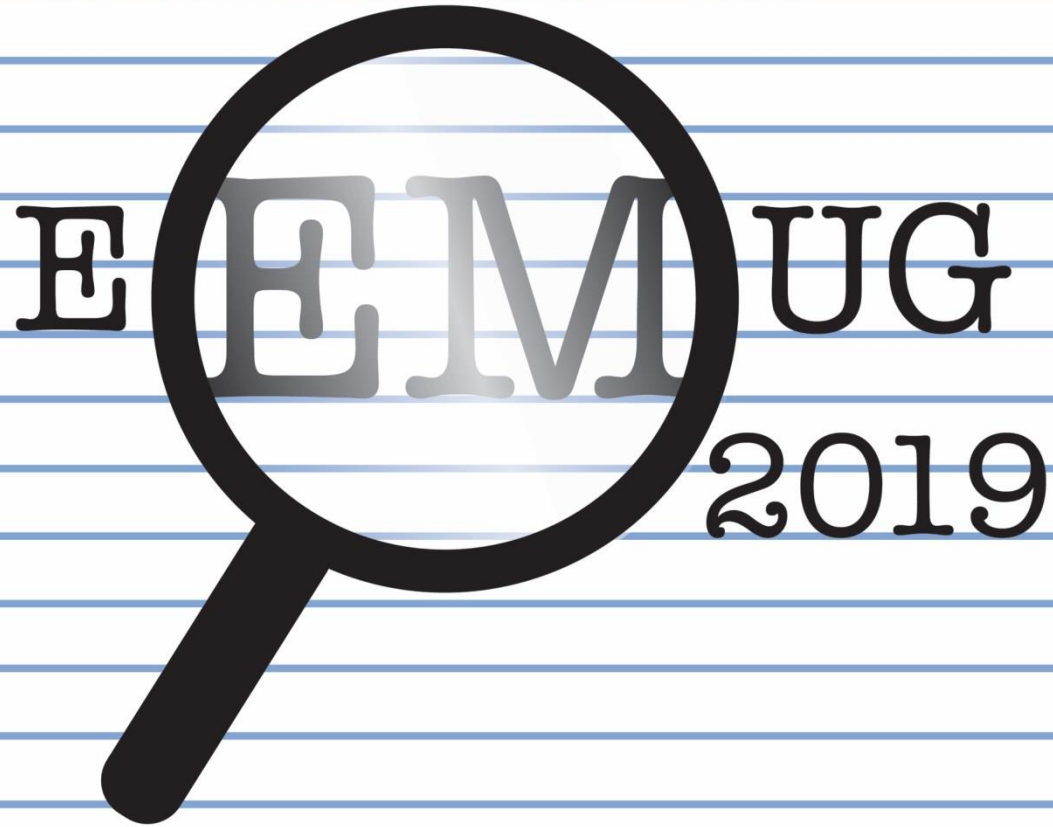


Welcome to



#EEMUG2019



# The Road Ahead

**Tony Alves**

**Director, Product Management**

[Orcid.org/0000-0001-7054-1732](https://orcid.org/0000-0001-7054-1732)



# To 16.1 and Beyond

Beta to begin September/October 2019

Upgrades November/December 2019

# Reassign Open Editor Assignments

Editors often leave a publication with open assignments – often they are stepping down as Editor-in-Chief or some other editorial board role.

Currently there are ways to handle reassignment of papers from one Editor to another, but these processes are manual and sometimes they skew historical data.

**SOLUTION: New functionality will allow open assignments to be either transferred batchwise from one editor to another or distributed among multiple new editors.**

# Reassign Open Editor Assignments

The user goes to a page that lists all the open assignments associated with that Editor.

A checkbox appears next to each.

User selects the submissions and clicks the Reassign button.



**Select Open Tasks for Reassignment - Lauren Oppenheim**

Page: 1 of 2 (15 total submissions)

	Manuscript Number	Article Title	Author Name	Article Type	Initial Date Submitted	Status Date	Current Status
<input checked="" type="checkbox"/>	LAURENDEV150-D-18-00004	Test to check which fields scrolling selector box responses populate in the db	Skipper Braud	Original Study	Jan 26, 2018	Jan 26, 2018	With Editor
<input checked="" type="checkbox"/>	LAURENDEV150-D-18-00003	Test with multiple email addresses for Suggest Reviewers and Co-Authors	Molly Carroll	Original Study	Jan 22, 2018	Jan 22, 2018	With Editor
<input checked="" type="checkbox"/>	LAURENDEV150-D-18-00001	Coco's submission to Merge Me Editor #2	Coco Mortenson	Original Study	Jan 18, 2018	Jan 18, 2018	With Editor
<input checked="" type="checkbox"/>	LAURENDEV150-D-18-00002	Gib's submission to Merge Me Editor #1	Gib Haffernick	Original Study	Jan 18, 2018	Jan 18, 2018	With Editor
<input checked="" type="checkbox"/>	LAURENDEV141-D-17-00017	Bert's submission to Thor's proposal	Gijsbertus Loos	Special Issue Article	Dec 21, 2017	Dec 21, 2017	With Editor
<input type="checkbox"/>	LAURENDEV141-D-17-00018	Fokke's submission to Thor's proposal	Fokke Naaktgeboren Niemandsvan Zuidewijn	Special Issue Article	Dec 21, 2017	Dec 21, 2017	With Editor
<input type="checkbox"/>	LAURENDEV141-D-17-00013	Cali's submission to the Discussion Forum proposal	Calista Oppenheim	Special Issue Article	Dec 18, 2017	Dec 18, 2017	With Editor
<input checked="" type="checkbox"/>	LAURENDEV141-D-17-00014	Coco's submission to the Discussion Forum proposal	Coco Mortenson	Special Issue Article	Dec 15, 2017	Dec 18, 2017	With Editor

# Reassign Open Editor Assignments

The previous Editor will be identified on all reassigned submissions that they had previously handled.

Action	Propo Manu: Num	Editor Originating Proposal	Handling Editor	# of Authors Invited	# of Authors
<a href="#">Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Edit Proposal</a> <a href="#">Unassign Editor</a> <a href="#">Invite Authors</a> <a href="#">View Related Submissions</a> <a href="#">Set Final Disposition</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Scopus - Title Search</a>	LAURE D-17-0	Thor Kunkel	Thor Kunkel was: Pippa Oppenheim	3	3
<a href="#">View Proposal</a> <a href="#">Details</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Edit Proposal</a> <a href="#">Unassign Editor</a> <a href="#">Invite Authors</a> <a href="#">View Related Submissions</a> <a href="#">Set Final Disposition</a>	LAURE D-17-0	Lauren Oppenheim	Lauren Oppenheim	4	4

Blinded Editors: [Blinded Editors](#)

**Name:** Thor Kunkel [\[Proxy\]](#)  
was: Pippa Oppenheim

**Role:** Editor

**Date Assigned:** Dec 29, 2017

**Date Completed:**

**Elapsed Days:** 10

**Recommendation:**

---

**Reviewers**

**Name:** Elmer Gantry (Reviewer) [\[Proxy\]](#)

**Review Status:** Agreed to Review

**Date Reviewer Invited:** Dec 29, 2017

**Date Reviewer Agreed:** Dec 29, 2017

**Date Review Due:**  (mm/dd/yyyy)

# Submission Updates via EM Web Services API

**A new General Purpose Transactional API and Web Service was introduced in version 15.1.** This API allows customers to retrieve submission metadata from the system using API calls.

EM will now allow select submission data, specifically Additional Manuscript Detail (AMD) fields, to be sent to the system with the intention of populating or overwriting data already in those fields.

# Additional Manuscript Details Merge Fields

New custom merge fields will pull AMD descriptions and their values into Letters sent out from EM.

De-select the 'Hide' checkbox in the Merge Fields row to allow two merge fields for this Additional Manuscript Detail field to be available for use in letters. Then enter a label to identify these merge fields, which the system will use to create the merge field names. These merge fields will pull the Field Description and its Value for the current manuscript into a letter.

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	This is the help text for the AMD field on the AMD page. DOES THIS SHOW UP?
Manuscript Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	this is the help text for the AMD field on the Manuscript Details page.
<i>Part of table omitted</i>				
Transmittal Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	This is the help text for an AMD field for the number of text pages in a manuscript.
	Custom Metadata ID: <input type="text" value="AMD_CMI_Text-Pages-1"/> <a href="#">Select Custom Metadata ID</a>			
Merge Fields	<input type="checkbox"/>	N/A	N/A	N/A
	Merge Field Label: <input type="text" value="TEXT_PAGES"/> <i>Maximum 256 alphanumeric characters and underscores allowed, no spaces</i>			



# Production Tracking – Enterprise View

Production tracking in ProduXion Manager (PM) follows the Editorial Manager model of “one journal, one site”. This means the Production Tasks menu provides searching and visibility to submissions and tasks on the single journal level. However, many users involved in the production process work across publications, especially those managing the work.

**SOLUTION: Provide a Cross-Publication Production Tasks menu that combines submissions and tasks from multiple PM sites, so that the user can log in to one site to perform tasks assigned to them from any PM site, and/or to manage submissions in production across the PM sites.**

# Enterprise View (16.1)

- Contains links and folders that combine all pubs that a user can access
- Quick Searches are saved searches that can include results from across pubs
- To Do List has all tasks assigned to logged-in user across all pubs

Editorial Production Tasks Enterprise View

**Senior Manager Enterprise View Menu**

Quick Searches:  
[Author Corrections Ready for Review](#)  
[Another Saved Search](#)

**Search**  
[Search Submissions](#)

**To-Do List**  
[Submission Tasks Assigned to Me \(7\)](#)  
[Schedule Group Tasks Assigned to Me \(1\)](#)

**Task Management Overview**  
[Production Initiated - No Tasks Assigned \(15\)](#)  
[Submission Tasks I Have Assigned \(20\)](#)  
[Schedule Group Tasks I Have Assigned \(8\)](#)  
[View All Production Tasks With Authors \(3\)](#)  
[View All Production Tasks with Editors \(110\)](#)

**Submission Overview**  
[View All Submissions in Production \(58\)](#)  
['At Risk' Submissions \(3\)](#)  
[Production Status Grid](#)

**Scheduling**  
[Manage Schedule Groups](#)

**Reports**  
[Cross-Publication Enterprise Analytics Reporting](#)

# Enterprise View (17.0)

- Task Management Overview allows a "birds-eye" view of tasks and Editor workloads across pubs
- Submission Overview allows a "birds-eye" view of status of each submission across pubs

**Editorial** **Production Tasks** Enterprise View

**Senior Manager  
Enterprise View Menu**

Quick Searches:  
[Author Corrections Ready for Review](#)  
[Another Saved Search](#)

**Search**  
[Search Submissions](#)

**To-Do List**  
[Submission Tasks Assigned to Me \(7\)](#)  
[Schedule Group Tasks Assigned to Me \(1\)](#)

**Task Management Overview**  
[Production Initiated - No Tasks Assigned \(15\)](#)  
[Submission Tasks I Have Assigned \(20\)](#)  
[Schedule Group Tasks I Have Assigned \(8\)](#)  
[View All Production Tasks With Authors \(3\)](#)  
[View All Production Tasks with Editors \(110\)](#)

**Submission Overview**  
[View All Submissions in Production \(58\)](#)  
['At Risk' Submissions \(3\)](#)  
[Production Status Grid](#)

**Scheduling**  
[Manage Schedule Groups](#)

**Reports**  
[Cross-Publication Enterprise Analytics Reporting](#)

# Enterprise View (17.0)

- Scheduling
  - Provides statistics about each issue such as Current Number of Submissions, Page Budget and Image Counts
  - Allows drill-down into issue's TOC, access to files and correspondence
- Reports section allows access to reminder reports and all cross-publication reports

**Editorial** **Production Tasks** Enterprise View

### Senior Manager Enterprise View Menu

Quick Searches:  
[Author Corrections Ready for Review](#)  
[Another Saved Search](#)

#### Search

[Search Submissions](#)

#### To-Do List

[Submission Tasks Assigned to Me \(7\)](#)  
[Schedule Group Tasks Assigned to Me \(1\)](#)

#### Task Management Overview

[Production Initiated - No Tasks Assigned \(15\)](#)  
[Submission Tasks I Have Assigned \(20\)](#)  
[Schedule Group Tasks I Have Assigned \(8\)](#)  
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[View All Production Tasks with Editors \(110\)](#)

#### Submission Overview

[View All Submissions in Production \(58\)](#)  
['At Risk' Submissions \(3\)](#)  
[Production Status Grid](#)

#### Scheduling

[Manage Schedule Groups](#)

#### Reports

[Cross-Publication Enterprise Analytics Reporting](#)

# *LiXuid Manuscript*<sup>TM</sup> Roadmap

**PHASE 1: New Author UI and Metadata *Xtract***

**PHASE 2: Automated XML Workflow**

# Submit Manuscript – *Xtract*

## Planned improvements:

- Extraction of keywords
- Discreet affiliations into separate fields
- Matching Institutions with identifiers (Ringgold, GRID, ORGID)
- Extraction of funding information from acknowledgements
- Extraction from PDFs
- Extraction from LaTeX and arXiv

# Submit Manuscript – Xtract

## Keywords

The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with links like HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, and JOURNAL OVERVIEW. The user's role is 'Author' and the language is 'English'. A red banner below the navigation bar reads: 'Important Message: Site under development. Do not use for live manuscript submission.' Below this is a progress bar with seven steps: Article Type Selection, Attach Files, General Information, Review Preferences, Additional Information, Comments, and Manuscript Data. The 'Manuscript Data' step is highlighted with a download icon. A yellow rounded rectangle highlights a 'New Keywords Found' dialog box. The dialog box has a title bar 'New Keywords Found' and a blue header. The main text says: 'Editorial Manager has identified new Keywords in your uploaded manuscript file. Please review the new and existing Keywords below. Click the 'Use New Keywords' button to update the Keywords or click the 'Use Existing Keywords' button to retain the previously entered Keywords. You will be able to manually edit the selected value if necessary.' Below the text are two buttons: 'Use Existing Keywords' and 'Use New Keywords'. Under each button is a text input field. The 'Use Existing Keywords' field contains the text 'One; two three; four'. The 'Use New Keywords' field contains the text 'Eén; twee; drie; vier'. At the bottom of the dialog box, there are three buttons: 'Back', 'Save & Submit Later', and 'Build PDF for Approval'.

em Editorial Manager™

em Editorial Manager™

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

Role: Author Username: call English

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

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

[Insert Special Character](#)

**New Keywords Found**

Editorial Manager has identified new Keywords in your uploaded manuscript file. Please review the new and existing Keywords below. Click the 'Use New Keywords' button to update the Keywords or click the 'Use Existing Keywords' button to retain the previously entered Keywords. You will be able to manually edit the selected value if necessary.

Use Existing Keywords Use New Keywords

One; two three; four

Eén; twee; drie; vier

Back Save & Submit Later Build PDF for Approval

# Submit Manuscript – Xtract

## Discrete Affiliations

The screenshot displays the 'Edit Author Details' window for Jung-Sun Lee. The main interface on the left shows a progress bar with 'Upload Files', 'General Information', and 'Review Preferences' all marked as complete. Below this are sections for 'Title', 'Abstract', and 'Authors'. The 'Current Author List' shows three authors: Chang-Yong Kim, Jung-Sun Lee, and Hyeong-Dong Kim, each with edit and delete icons.

The 'Edit Author Details' window for Jung-Sun Lee includes the following fields:

- Given/First Name\***: Jung-Sun
- Family/Last Name\***: Lee
- Affiliation**: Department of Epidemiology and Health Informatics, The Graduate School of Public Health, **Korea University**, Seoul, Republic of Korea
- Institution**: Korea University
- Affiliation**: Department of Health Science, the Graduate School, **Dongduk Women's University**, Seoul, Republic of Korea
- Institution**: Dongduk Women's University
- E-mail Address\***: lee@mailinator.com
- Contributor Roles**: [Click here to select roles](#)
- This is the corresponding author
- Equal Contribution Status

Red curved arrows point from the 'Institution' field to the 'Affiliation' field for each of the two entries, indicating that the affiliation text is derived from the institution name. A yellow rounded rectangle highlights the two affiliation and institution entries.



# Submit Manuscript – Xtract

## Submission Item Parameters:

### Primary Manuscript File:

Select a Submission Item Type to be assigned to the file uploaded at the initial step of the Attach File process. The selected Submission Item Type will be automatically configured as follows (in the settings below): Required for Submission – Required. Allow Offline Submission – Hidden.

New Submission

Revised Submission

None

None

Allow PDFs to be sent for metadata extraction



Article Type Selection



Attach Files



General Information



Review Preferences



Additional Information



Comments



Manuscript Data

A Manuscript is requested.

Please provide a single file containing your manuscript now. Data included in your manuscript may be used to populate information for you later in the submission process. You may click the 'Proceed' button to upload other submission items now.

[Insert Special Character](#)

Browse...

OR



Drag & Drop Files Here

To attach files from arXiv.org, enter the arXiv identifier (sample: XXXX.XXXXX) and click **Attach arXiv Files**.

arXiv Identifier:

Attach arXiv Files

No Items have yet been attached for this submission.

\*\*These are the Attach Additional Files (No Files Uploaded) instructions for NEW SUBMISSION.

[← Back](#)

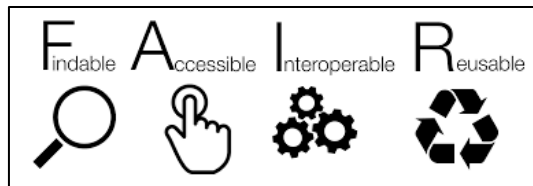
[Proceed →](#)

## Xtract from PDF, LaTeX and arXiv

# Repositories – Data, Video, etc.

Repositories and data trusts, both commercial and institutional, are increasingly being used to store large data sets, image banks, video libraries and code snippets.

This is particularly important for initiatives in reproducibility, open science, and open data – FAIR data!



Making data **F**indable, **A**ccessible, **I**nteroperable, and **R**e-usable.



# Repositories – Data, Video, etc.

An easy way to submit data sets to repositories.

**Article Type Selection** **Attach Files** General Information Review Preferences Comments Manuscript Data

**Required For Submission:**

- Manuscript
- URL ONLY

*Please provide an additional items.*

Item

Enter a **Description** and select a **Delivery Method** click **Attach This Information**.

Description

Delivery Method  Online  Other

Have you already uploaded ANY of your previous files to figshare?  
 Yes  No

Repository  Title  Access

Please enter all details for datasets uploaded to figshare, including entering this information, please click 'Attach This Information'.

**i) Upload File** **ii) File Description**

These files will be stored privately on **figshare** by default.

By default, all authors associated with the submission will be listed as potential authors for each data file, although the names of authors who did not contribute to the preparation of a file should be removed for that file.

Accessing this tab multiple times will enable you to upload multiple files to the private space in **figshare** that will be accessible by editors and reviewers.

5GB of data storage is covered as part of the standard article processing charge. Additional charges may apply for larger datasets. [Read more](#)

# Shortcuts for Editors and Editorial Staff

**Request and Grant/Deny Due Date Extensions** – mechanism for Authors and Reviewers to request a due date extension, and for Editors and staff to grant or deny the extension

**New Reviewer Invitation**

You have been invited to review the following article:

**Request Extension**

Thank you for your time in considering this invitation. Below, please enter the date by which you will be able to submit your review. Your request for a deadline extension will be reviewed by the Journal Office, who will determine if the extension can be granted.

**Requested Due Date:**  (mm/dd/yyyy)

Please provide your reason for requesting an extension (optional):

**Action**

- View Abstract
- Agree to Review
- Agree and Request**
- Decline to Review
- Send E-mail
- View Abstract

Send E-mail

View Submission

# Shortcuts for Editors and Editorial Staff

Removing Role Shortcuts – easy access to close out open Editor assignments instead of hunting down each assignment that prevents the role change or people record inactivation

The screenshot shows the Editorial Manager web interface. At the top left is the logo 'em Editorial Manager™'. Below it is a navigation menu with links: HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. On the top right, there is a search bar with 'Go to: -- Search Page --' and a dropdown arrow. Below the search bar, it shows 'Role: Managing Editor' and 'Username: lauren'. A prominent red banner across the top of the main content area contains the text: 'Important Message: Site under development. Do not use for live manuscript submission.' Below the banner, on the left side, is a bold heading: 'Cannot save changes to Editor Role'. On the right side, there is a grey box containing the following text: 'This is the only user assigned to the Editor role configured in PolicyManager to receive Request for Removal notifications. The Editor role must be removed on the Privacy Policy Configuration page, or at least one other person must be assigned to the role, before this user's Editor role can be removed.' Below this, it says 'This user created one or more automated reminder reports:' followed by two lines: 'Automated Reviewer Reminder: Pippa's automated reviewer reminder report' and 'Automated Author Reminder: Pippa's automated author reminder report'. Then it says 'Any automated reminder reports that this user created as an Editor must be deleted before the Editor role can be removed.' Below that, it says 'One or more submissions are still associated with this user:' followed by five lines of submission details: 'LAURENDEV151-D-18-00066: Editor is part of a Suggested Editor Queue', 'LAURENDEV151-D-18-00069: Editor is part of the assignment chain', 'LAURENDEV151-D-18-00074: Editor is part of the assignment chain', 'LAURENDEV151-D-18-00087: Editor has an outstanding invitation', and 'LAURENDEV151-D-18-00089: Editor is editing this submission'.

# Shortcuts for Editors and Editorial Staff

Re-invite Reviewer Link – a quick way to re-invite/assign Reviewers who declined or got un-invited, but then later agree to do the assignment

### Reviewer Selection Summary - Submission LAURENDEV141-D-17-00013

Calista Oppenheim  
Cali's submission to the Discussion Forum proposal

#### Reviewer Search

Search My Publication  from

Reviewer Discovery from ProQuest Community of Scholars

#### Review Settings

This Submission will move to the 'Submissions with Required Reviews Complete' folder as soon as 2 [\[Change\]](#) review(s) have been completed.

Automatically un-invite Reviewers who do not respond to an invitation within 7 [\[Change\]](#) day(s). [\(more...\)](#)

Automatically un-assign Reviewers who do not complete a review within 0 [\[Change\]](#) day(s) of the review due date. [\(more...\)](#)

#### Selected Reviewers

Invited Reviewers and Linked Alternate Reviewers		
Chan Kunkel (Reviewer)	Agreed to Review <i>Dec 20, 2017</i>	<a href="#">Un-assign</a>
Gilbert Guerrero (Reviewer)	Agreed to Review <i>Feb 08, 2018</i>	<a href="#">Un-assign</a>
Elmer Gantry (Reviewer)	Reviewer Invited <i>Apr 18, 2018</i>	<a href="#">Un-invite</a>
Molly Carroll (Reviewer)	Reviewer Invited <i>Apr 18, 2018</i>	<a href="#">Un-invite</a>
George F. Babbitt (Reviewer)	Un-invited Before Agreeing to Review <i>Apr 18, 2018</i>	<a href="#">Re-invite</a>
Johnny Depp (Reviewer)	Un-invited Before Agreeing to Review <i>Apr 18, 2018</i>	<a href="#">Re-invite</a>

# Shortcuts for Editors and Editorial Staff

## Article Type Specific Recommendation Terms – Ability to define a list of Reviewer Recommendation and Editor Decision Terms by Article Type

The screenshot displays the Editorial Manager interface for a Managing Editor. The top navigation bar includes the 'em Editorial Manager' logo, a play button icon, and the user's role and username: 'Role: Managing Editor Username: lauren'. Below the navigation bar, there are several configuration sections:

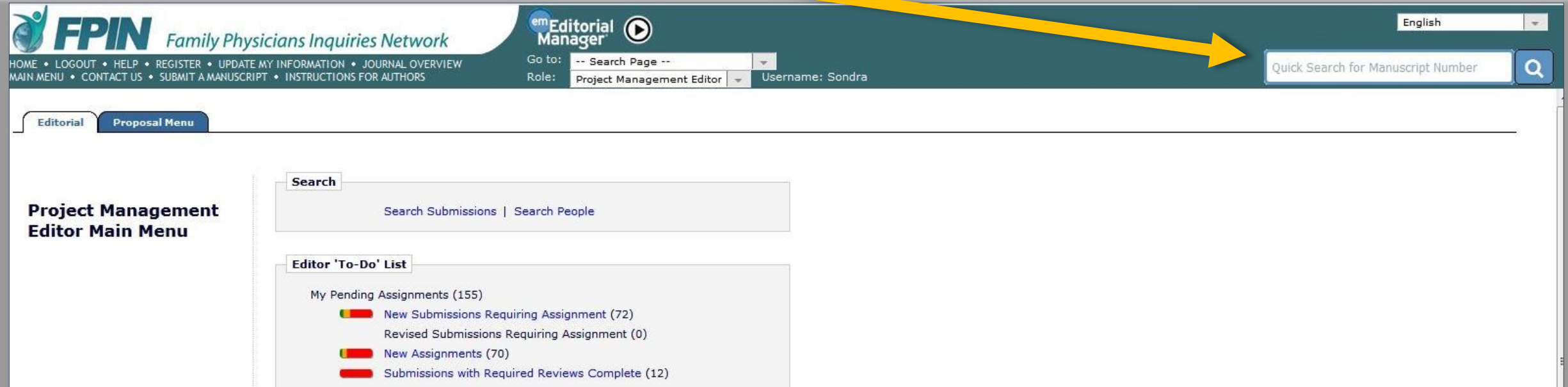
- Automatically Promote Alternate Reviewers:** A checkbox that is checked.
- Only Promote unlinked Alternate Reviewers with MATCHING Roles:** A checkbox that is checked.
- Promotion Options:** Two radio buttons: 'Continue promoting Alternates until there are no more Alternates in queue' (selected) and 'Only promote Alternate Reviewers when the combined number of Agreed and Completed Reviews is less than the current value of the Submission's own 'Required Reviews Complete' value'.
- Days to Review This Article Type:** A text input field containing the number '14'.
- Reviewer Recommendation Terms:** Two dropdown menus for 'New Submission' and 'Revised Submission'. Both are set to '14' days. The dropdowns show a list of terms: Accept, Conditional Accept, Minor Revision, Major Revision, Reject, Statistically Invalid, Methodologically Invalid, Conceptually Invalid, and Out of Scope. A red note states: 'The Reviewer Recommendation Terms selected will be presented to reviewers submitting a review for this Article Type.'
- PDF Cover Page Layout:** Two dropdown menus: 'Editor\Author Version' (set to 'Editor/Author Layout 001') and 'Reviewer Version' (set to 'Reviewer Layout 001').
- Article Type Parameters:** Two dropdown menus for 'New Submission' and 'Revised Submission', both set to 'Hidden'.

Additional text on the right side of the interface explains the 'Automatically Promote Alternate Reviewers' options: 'Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines, is un-invited, or un-assigned. Select this box to only Promote unlinked Alternate Reviewers with MATCHING Reviewer Roles.'



# Shortcuts for Editors and Editorial Staff

**Quick Search Box** – field in menu bar to enter a ms number and quickly find a submission, without going to the Search Submission tool



The screenshot displays the FPIN (Family Physicians Inquiries Network) Editorial Manager interface. The top navigation bar includes the FPIN logo, a list of links (HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, INSTRUCTIONS FOR AUTHORS), the Editorial Manager logo, a 'Go to' dropdown menu (set to '-- Search Page --'), a role dropdown (set to 'Project Management Editor'), and a username field (set to 'Sondra'). A language selector is set to 'English'. A yellow arrow points from the text above to a search box in the top right corner labeled 'Quick Search for Manuscript Number' with a search icon. Below the navigation bar, there are tabs for 'Editorial' and 'Proposal Menu'. The main content area features a 'Project Management Editor Main Menu' on the left and a 'Search' section with links for 'Search Submissions' and 'Search People'. Below the search section is an 'Editor 'To-Do' List' showing 'My Pending Assignments (155)' with a breakdown: 'New Submissions Requiring Assignment (72)', 'Revised Submissions Requiring Assignment (0)', 'New Assignments (70)', and 'Submissions with Required Reviews Complete (12)'.



# Shortcuts for Editors and Editorial Staff

Allow “R” in MS Number Search – e.g., ASC123R2

The screenshot shows a submission management interface. On the left is a vertical menu with options like 'View Submission Details', 'History', 'Classifications', etc. The main area displays a table with submission details. A yellow arrow points from the manuscript number 'DEMO-D-04-00073R1' in the table to the 'Value' field in a search criteria dialog box.

Original Research	DEMO-D-04-00073R1	Edward Editor
-------------------	-------------------	---------------

Search Criteria Dialog:

Help with Searching      Insert Special Character      Value Options      Advanced Criteria

(	Criterion	Is/Is not	Selector	Value	)
	Manuscript Number	is	Contains	DEMO-D-04-00073R1	

Add

# Batch Functionality

**Batch Editor Assignment** – be able to assign multiple submissions to a single Editor at once, send just a single email to that Editor, allow editor to accept or decline assignments in batch

### Batch Assign to Editor

Select an editor to handle the selected submissions listed.

Previously selected submissions listed in the Selected Submissions grid may be excluded from the batch assignment by selecting Do Not Assign. Submissions for which there is a workflow conflict with the editor selected are automatically excluded from the assignment.

### Select Editor

Select	Editor Role	Editor Name	Current Assignments	Available during next 30 days
<input type="radio"/>	Guest Editor	Elmer Gantry, Ph.D.	1	Yes
<input checked="" type="radio"/>	Editor	Thor Kunkel	18	
<input type="radio"/>	Editor	Pippa Oppenheim	19	
<input type="radio"/>	Assistant Editor	Johnny Depp	8	

[Search Again](#)

### Selected Submissions

Page: 1 of 2 (92 total submissions) 1 2 ▶▶

Do Not Assign	Action	Manuscript Number	Author Name	Article Title
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a>	LAURENDEV151-D-18-00063	Lauren Oppenheim UNITED STATES	Submission that uses an Editor Assignment Chain Template
<input checked="" type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a>	LAURENDEV151-D-18-00064	Holly Singleton UNITED STATES	D2E submission #1 for Editor Thor
<input checked="" type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a>	LAURENDEV151-D-18-00065	Holly Singleton UNITED STATES	D2E submission #2 for Editor Thor <small>Selected Editor is blinded to this submission.</small>
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a>	LAURENDEV151-D-18-00089	Holly Singleton UNITED STATES	D2E submission #3 for Editor Thor
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a>	LAURENDEV151-D-18-00069	Penelope Kunkel UNITED STATES	Donderdagstestje #1_Thor is editing this submission & building a new PDF <small>Selected Editor may be the author of this submission.</small>
<input type="checkbox"/>	<a href="#">View Submission Details</a> <a href="#">History</a>	LAURENDEV151-D-18-00067	Calista Oppenheim THE NETHERLANDS	Donderdagstestje #2

### Batch Assign to Editor - Confirm and Customize Letter

You are assigning the selected submissions to the Editor below.

Click **Customize** to personalize the assignment letter to this editor. Once you have customized the letter, an asterisk is displayed next to the Editor's name. If you do not explicitly customize the letter, the default version will be sent.

You may click the drop-down **Letter** list and select a different letter, if additional letters have been configured. Note: if you personalize a letter and then select a new letter, your personalized text will be lost.

If you wish to complete the batch assignment without sending a letter to this Editor, you may check the **Do Not Send Letter** box.

### Editor Being Assigned

Name	Letter	Customize	Do Not Send Letter
Thor Kunkel (Editor)	Batch Assignment to Editor	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Cancel](#) [Confirm and Send Letter](#)

# Shortcuts for Editors and Editorial Staff

**Reviewer Search Preferences** – set the default Reviewer searching method, e.g., always search entire database, search for a specific Reviewer role

**Automatic Reviewer Role** – for Authors of accepted papers, grant them a Reviewer role automatically

**TechCheck Templates** – different Article Types can have different TechCheck parameters

# Batch Functionality

**Set Final Disposition –**  
Be able to set the Final Disposition for multiple submissions at once

The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with links: HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, INSTRUCTIONS FOR AUTHORS. The user is logged in as 'lauren' with the role of 'Managing Editor'. A red banner displays an 'Important Message: Site under development. Do not use for live manuscript submission.' Below this is a 'Quicklinks' section. The main content area is titled 'Search Submissions - Search Results' and contains a table of submissions. A modal dialog titled 'Set Final Disposition for Selected Submissions' is open, allowing the user to select a final disposition for the chosen items. The dialog includes a dropdown menu with 'Reject' and 'Withdrawn' options, and 'Cancel' and 'Proceed' buttons. The table below shows several submissions, with the first three rows highlighted in yellow, indicating they are the ones selected for the batch action.

Select	Action	Manuscript N		
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV15		
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV15		
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV15		
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV151-D-18-00105	Humbert Humbert UNITED STATES	Wonky Production Workflow #1
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV151-D-18-00106	Humbert Humbert UNITED STATES	Wonky Production Workflow #2
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV151-D-18-00107	Humbert Humbert UNITED STATES	Wonky Production Workflow #3
<input type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV151-D-18-00102	Humbert Humbert UNITED STATES	Snelle submissie #4

# Batch Functionality

Turn On and Turn Off  
Flags – be able to  
enable or disable flags  
on multiple submission  
at once

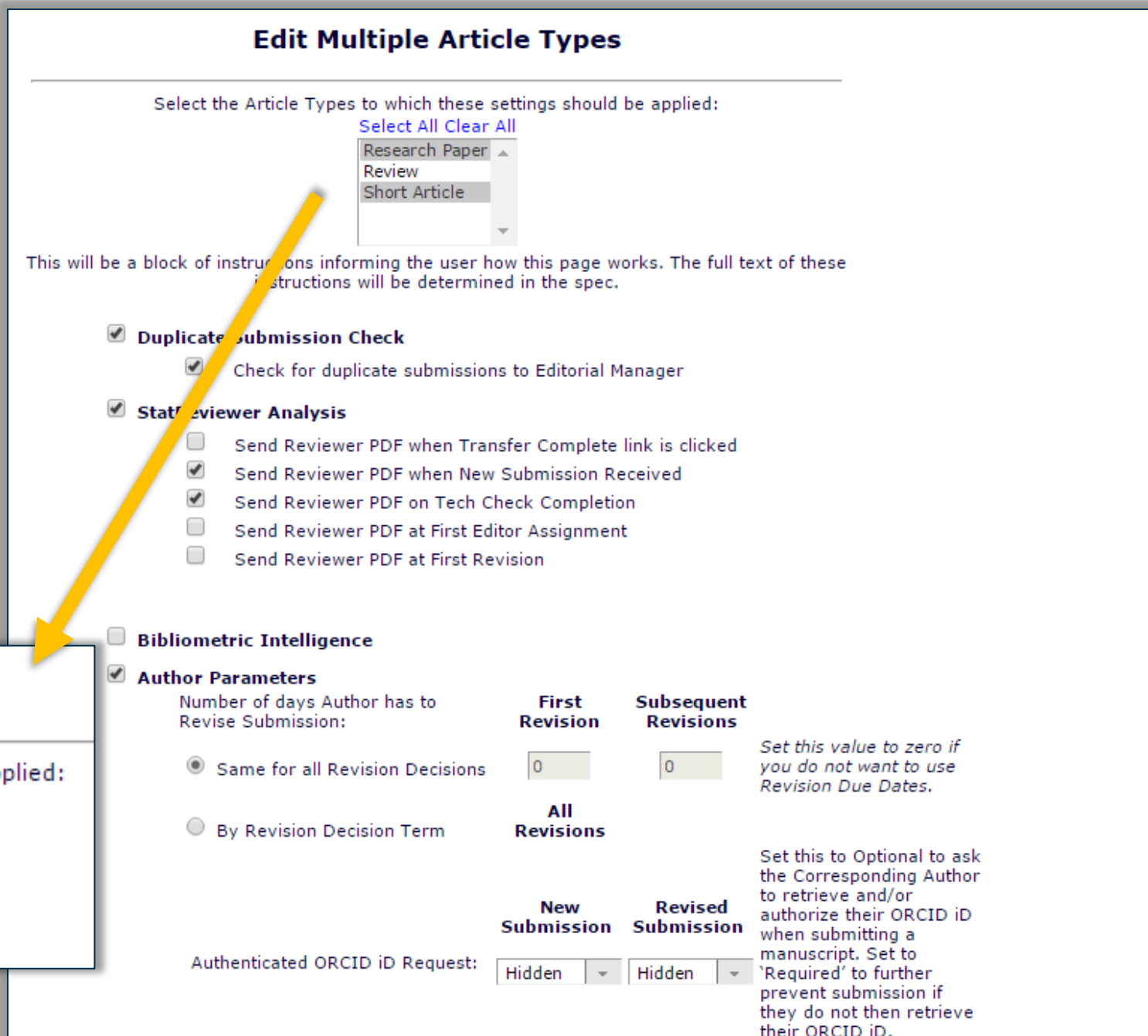
The screenshot shows the Editorial Manager interface with a modal window titled "Set Flags for Selected Submissions". The modal contains a text area with placeholder text and two "Submit" buttons. Below the text area is a table with "Flag Options", "Flag", and "Flag Name" columns. The table lists seven different flag options, each with radio buttons for "No Change", "Display Flag for Selected Submissions", and "Remove Flag from Selected Submissions".

Flag Options	Flag	Flag Name
<input type="radio"/> No Change <input checked="" type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	€	Goudmijntje
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	♥	Lief artikeltje
<input checked="" type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	☎	De beller is sneller
<input checked="" type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	⚙️	Flag associated with an AMD field
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	■	My parachute is red
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	■	My parachute is blue
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	■	My parachute is lavender

# Batch Functionality

## Article Type

Configuration – change configurations across multiple Article Types at once



**Edit Multiple Article Types**

Select the Article Types to which these settings should be applied:  
[Select All](#) [Clear All](#)

Research Paper  
Review  
Short Article

This will be a block of instructions informing the user how this page works. The full text of these instructions will be determined in the spec.

- Duplicate Submission Check**
  - Check for duplicate submissions to Editorial Manager
- Stat Reviewer Analysis**
  - Send Reviewer PDF when Transfer Complete link is clicked
  - Send Reviewer PDF when New Submission Received
  - Send Reviewer PDF on Tech Check Completion
  - Send Reviewer PDF at First Editor Assignment
  - Send Reviewer PDF at First Revision
- Bibliometric Intelligence**
- Author Parameters**

Number of days Author has to Revise Submission:

	<b>First Revision</b>	<b>Subsequent Revisions</b>	
<input checked="" type="radio"/> Same for all Revision Decisions	<input type="text" value="0"/>	<input type="text" value="0"/>	<i>Set this value to zero if you do not want to use Revision Due Dates.</i>
<input type="radio"/> By Revision Decision Term	<b>All Revisions</b>		
	<b>New Submission</b>	<b>Revised Submission</b>	
Authenticated ORCID iD Request:	<input type="text" value="Hidden"/>	<input type="text" value="Hidden"/>	Set this to Optional to ask the Corresponding Author to retrieve and/or authorize their ORCID iD when submitting a manuscript. Set to 'Required' to further prevent submission if they do not then retrieve their ORCID iD.

## Edit Multiple Article Types

Select the Article Types to which these settings should be applied:

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

Research Paper  
Review  
Short Article

# Letter/Email Improvements

**Attachments** – configure standard file attachments so that when the letter is sent from EM the attachment will automatically be included

**“High Importance” designation** – allow emails to be designated as High Importance on a template level and ad hoc when sending

# Reminder Letter Enhancements

**Configure Reminder Letters to Send by Intervals** – instead of setting up multiple reports with different due dates, configure a single report the sends reminders at intervals, e.g., after 1 day, 5 days and 10 days

**Auto-reminders for Co-Authors** – automated reminders to co-authors for verification, verify and register, and completing questionnaires

# Cross-Publication Functionality

**Article Type Configuration** – create Article Types or change configurations across multiple EM sites at once

**Submission Item Configuration** – create Submission Items or change configurations across multiple EM sites at once

**Production Task Configuration** – create Tasks or change configurations across multiple EM/PM sites at once

**Role Configuration** – create Editor and Reviewer roles or change configurations across multiple EM/PM sites at once



# General Purpose Transactional API and Web Services

**Notification Services** that use webhooks to deliver messages to customer-specified endpoints as workflow events occur

- Users can configure endpoints to which notifications should be sent, and select the workflow events that will trigger these notifications

**Web Services** that allow users to retrieve data using a GET method

- Publications has a Web Services account registered with Editorial Manager
- These accounts will be configured by Client Services
- Publication sends the request in the specified format, and results are returned
- Information delivered in either XML or JSON

# General Purpose Transactional API and Web Services

**We are looking to our customers to define how this general API should be enhanced, and to prioritize those additions.**

**Some general improvements:**

- Make more fields and tables accessible via the API
- Be able to receive data from other systems
- Be able to write to, and replace data in the EM/PM database
- Be able to send files via the API
- Be able to receive files via the API

# General Purpose Transactional API and Web Services

Expanding the API to to return production-specific information

Will use the same credentials and authentication mechanism as the existing EM Web Services calls

Actual Online Publication Date	Black and White Image Count	Schedule Group Year
Article Type Name	Color Image Count	Schedule Group Date Closed
Date First Entered	Production Status	Schedule Group Date Re-opened
Date Production V	Target Number of P	Controlling Group Indicator
Date Production V	Submission Target C	Target Table of Contents Position
Date Final Dispos	Submission Target I	Target End Page
Unique Document DOI	Submission Target I	Target Start Page
Article Title	Submission Target I	Schedule Group TOC Last Modified
Submission Actual	EM Production Stat	Task element containing multiple records for the following sub-elements (o
Final Decision Da	Schedule Group ele	record for each task assignment)
Global MS ID	Schedule Group TO	Production Task Assignor ID
Import Date	Schedule Group Sta	Production Task Assignor's Role
Preprint DOI	Schedule Group Bla	Assignee First Name
Production Notes	Schedule Group Co	Assignee Last Name
Submission Actual	Schedule Group De	Assignee Middle Name
Manuscript Num	Schedule Group ID	Assignee ID
Submission Actual	Schedule Group No	Assignee's Role
Submission Actual	Schedule Group Pa	Assignment Date
Publish With ID	Target Publication I	Custom Metadata ID
Initial Date Subm	Schedule Group Tar	Assignor First Name
Revision Number	Target Online Publi	Assignor Last Name
Actual Print Page	Target Publication I	Assignor Middle Name
	Target Publication V	

# Conflict of Interest

Convey is a global disclosure system developed by the Association of American Medical Colleges (AAMC) that allows publishers and societies to store conflict of interest disclosure information for authors and other members.

Publications that have an agreement with Convey are able to use this system to set up and tailor their COI policy requirements, creating a series of forms and questionnaires within the Convey interface that will be presented to users.

<http://www.convey.org>



# Conflict of Interest

Possible COI integration – either Editors and Reviewers to the COI or pull COI data into EM

<b>Additional Manuscript Details:</b>	<a href="#">Add/Edit Additional Manuscript Details</a>
<b>Corresponding Author:</b>	Duncan James Webber, Aries Systems North Andover, MA UNITED STATES
<b>Corresponding Author E-Mail:</b>	<a href="mailto:mdinatale@ariessys.com">mdinatale@ariessys.com</a>
<b>Author Comments:</b>	
<b>Short Title:</b>	sdfsdf
<b>Article Type:</b>	Original Study
<b>Section/Category:</b>	
<b>Keywords:</b>	dsfsdfsdf
<b>Classifications:</b>	This manuscript does not have any Cl
<b>Requested Editor:</b>	
<b>Technical Check:</b>	<a href="#">View Technical Check Information</a>
<b>Conflict of Interest:</b>	<a href="#">View COI Disclosure</a>
<b>Initial Date Submitted:</b>	Jan 21 2015 02:12PM
<b>Editorial Status Date:</b>	Nov 16 2015 05:57PM
<b>Current Editorial Status:</b>	Under Peer Review
<b>Submission Target Publication Date:</b>	<input type="text"/> (mm/dd/yyyy)

**Conflict of Interest Disclosures for Manuscript Number: MIKETEST131-D-16-03143 "Hydrogen Sulfide Delays LPS-induced Preterm Birth in Mice via Anti-inflammatory Pathways"**

[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 2/22/16 12:30:12 PM [Expand all / Collapse All](#)

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**Stock and Other Ownership Interests**  
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Company Name: Pfizer - Recipient: Horace Williamson  
Company Name: Celera - Recipient: An Immediate Family Member  
**Consulting or Advisory**  
Company Name: Seis - Recipient: An Immediate Family Member  
**Speakers' Bureau**  
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**Patents, Royalties**  
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**Honoraria**  
Company Name: Pfizer - Recipient: Horace Williamson  
Company Name: Celera - Recipient: An Immediate Family Member
- Kimberly Deal**  
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**No information available**

# Book Processing

**Better Permissions** – currently, Editors have access to all books being managed in the system. New permissions will be added to allow and restrict access to the different books being processed.

**Better Book and Chapter Signalling** – Book and chapter titles are missing from some folders. These fields will be added to the grids on those folders.

**Streamlined Book Planning** – Table of Contents as a starting point.

# Industry Standards



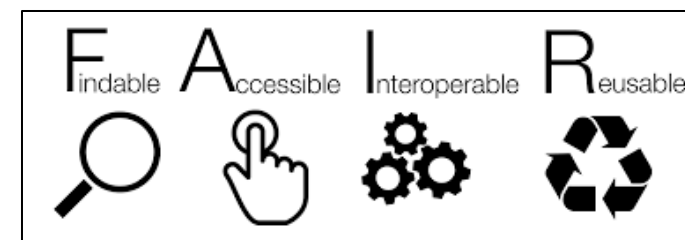
Optimizing the machine reuse of scholarly content tagged in JATS XML, and to improving XML literacy.



Advocating richer, connected, and reusable, open metadata for all research outputs.



MECA - Developing a common approach to manuscript transfer that can be adopted across the industry.



Making data **F**indable, **A**ccessible, **I**nteroperable, and **R**e-usable.



# Artificial Intelligence

**Manuscript evaluation tools** that use advanced machine intelligence and natural-language understanding to help publications assess the quality of submitted manuscripts by examining the structure, declarations, statistics, referencing, and other manuscript elements.

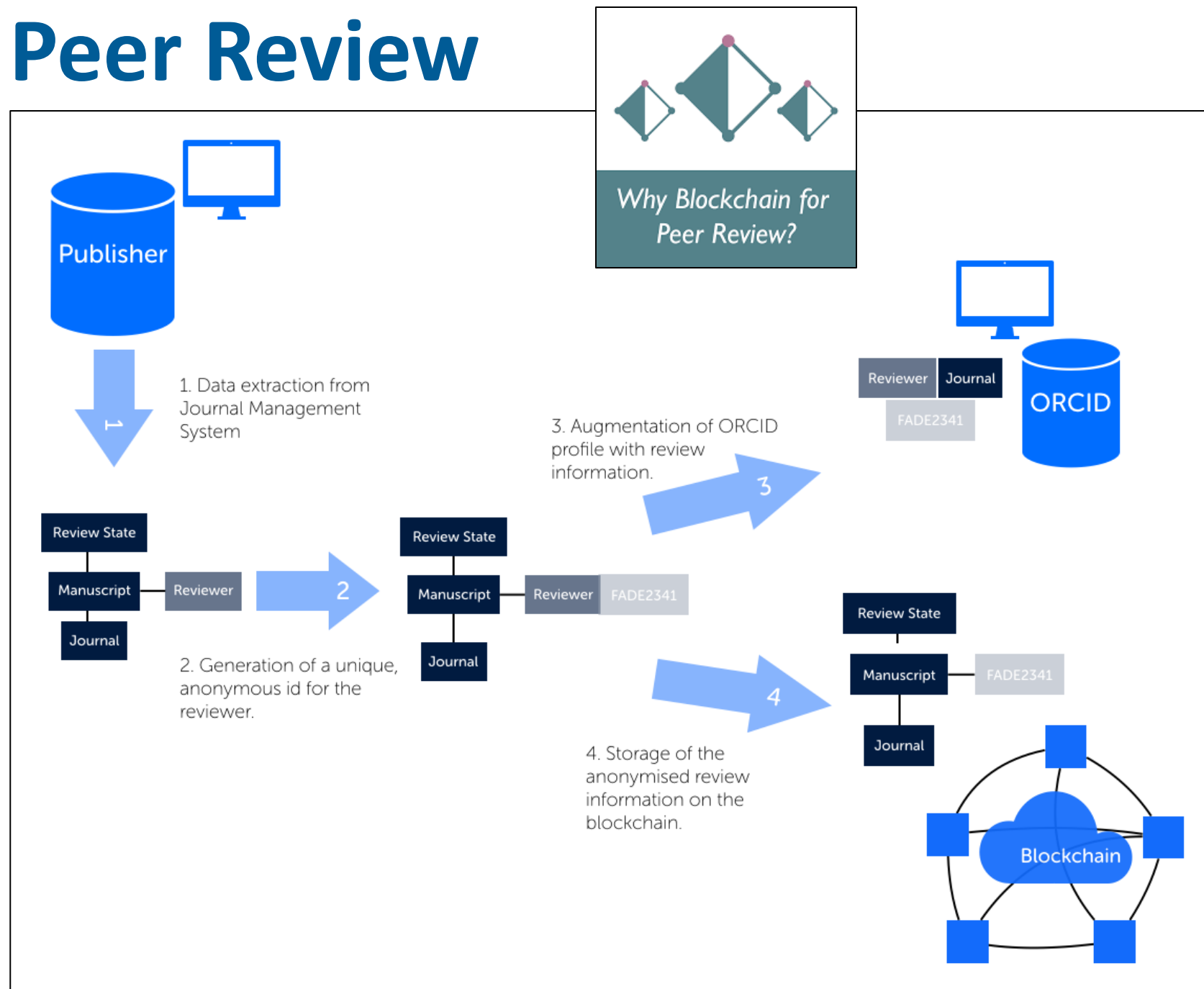


# Meta<sup>α</sup>



# Blockchain for Peer Review

A protocol where information about peer review activities are stored on a blockchain, allowing the review process to be independently validated, to ensure recognition and validation for reviewers, while adhering to laws on privacy, data protection and confidentiality.



# Global Identity Management



Resource Access for the 21st Century (RA21) is a joint STM and NISO initiative aimed at optimizing access to scholarly information resources across publishers, librarians, campuses, vendors, and identity federation operators.

ORCID's vision is a world where all who participate in research, scholarship, and innovation are uniquely identified and connected to their contributions across disciplines, borders, and time.





**Questions?**  
Thank you!

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