Welcome to the 16TH Annual EMUG BOSTON

#EMUG2018

em Editorial Manager® pm ProduXion Manager®

Early Decision Workflow

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16th Annual em Editorial Manager® User Group Meeting

Aries systems

Early Decision Workflows are supported in Editorial Manager version 15.0!

“Desk Reject”

- Global scientific output **doubles** every nine years [1]
- Reviewers are a scarce resource
- Editors must identify those papers which have little chance of acceptance as quickly as possible
- First pass screening:
  - Does the topic fit within the journal’s scope?
  - Does the content offer a potential contribution to the literature?
  - Are the format, syntax, and grammar consistent with the journal’s policies and expectations?

[1] (n.d.). Retrieved from http://blogs.nature.com/news/2014/05/global-scientific-output-doubles-every-nine-years.html

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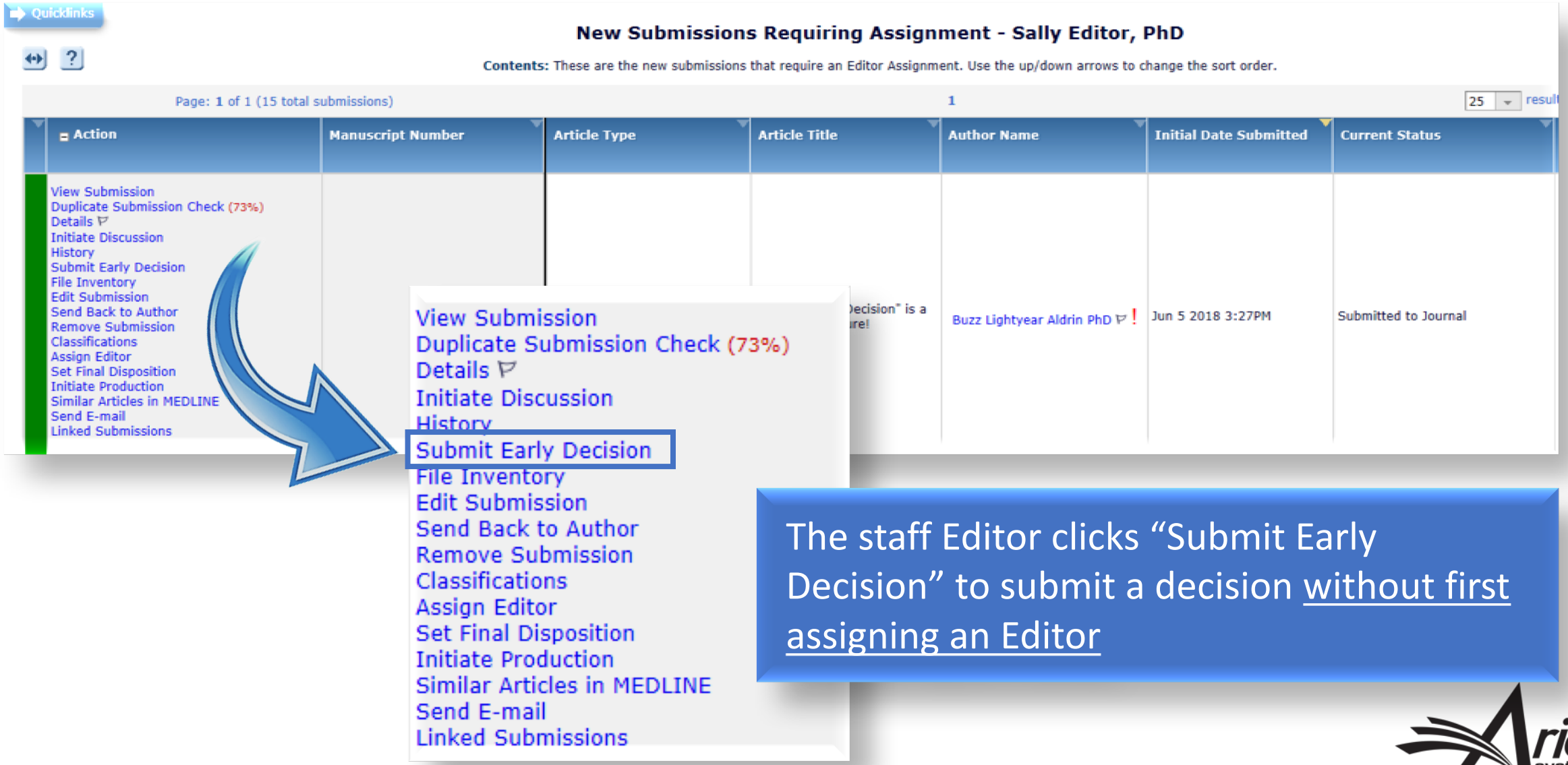
New ‘Submit Early Decision’ Feature in EM 15.0

- Primary Objective – provide a short-cut for staff Editors to submit a quick decision for a new submission
- Decision is submitted on behalf of a specific Editor
- The decision term can be in any decision family, but must be configured for early decision
- Staff Editors must have new “Submit Early Decision” permission

“Submit Early Decision” Action Link

- Displayed in:
  - "New Submissions"
  - "New Submissions Requiring Assignment"
  - "Direct-to-Editor New Submissions"
  - "Search Submission – Search Results" (when the submission is also located in one of the folders listed above, i.e. is an Original Submission and an Editor has not been assigned)

“New Submissions Requiring Assignment”

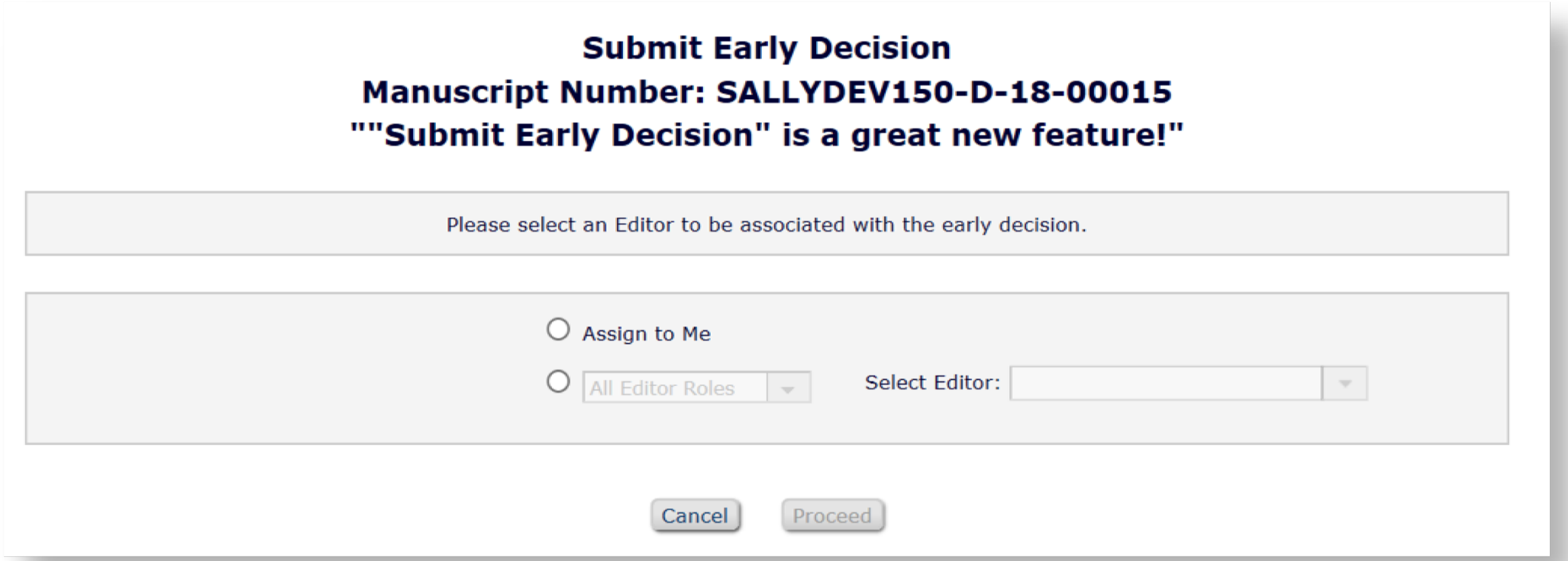


The staff Editor clicks “Submit Early Decision” to submit a decision <u>without first assigning an Editor</u>

Staff Editor Selects a Role and Editor to be Assigned

- The Staff Editor must select an Editor who will be credited with the decision
- The assignment occurs 'behind-the-scenes' and provides a name that can be used to populate the %EDITOR_NAME% merge code in the Author Notification Letter
- The selected Editor's Role, together with the Article Type, determine whether Editor Decision Phrases are displayed on the *Submit Early Decision* page

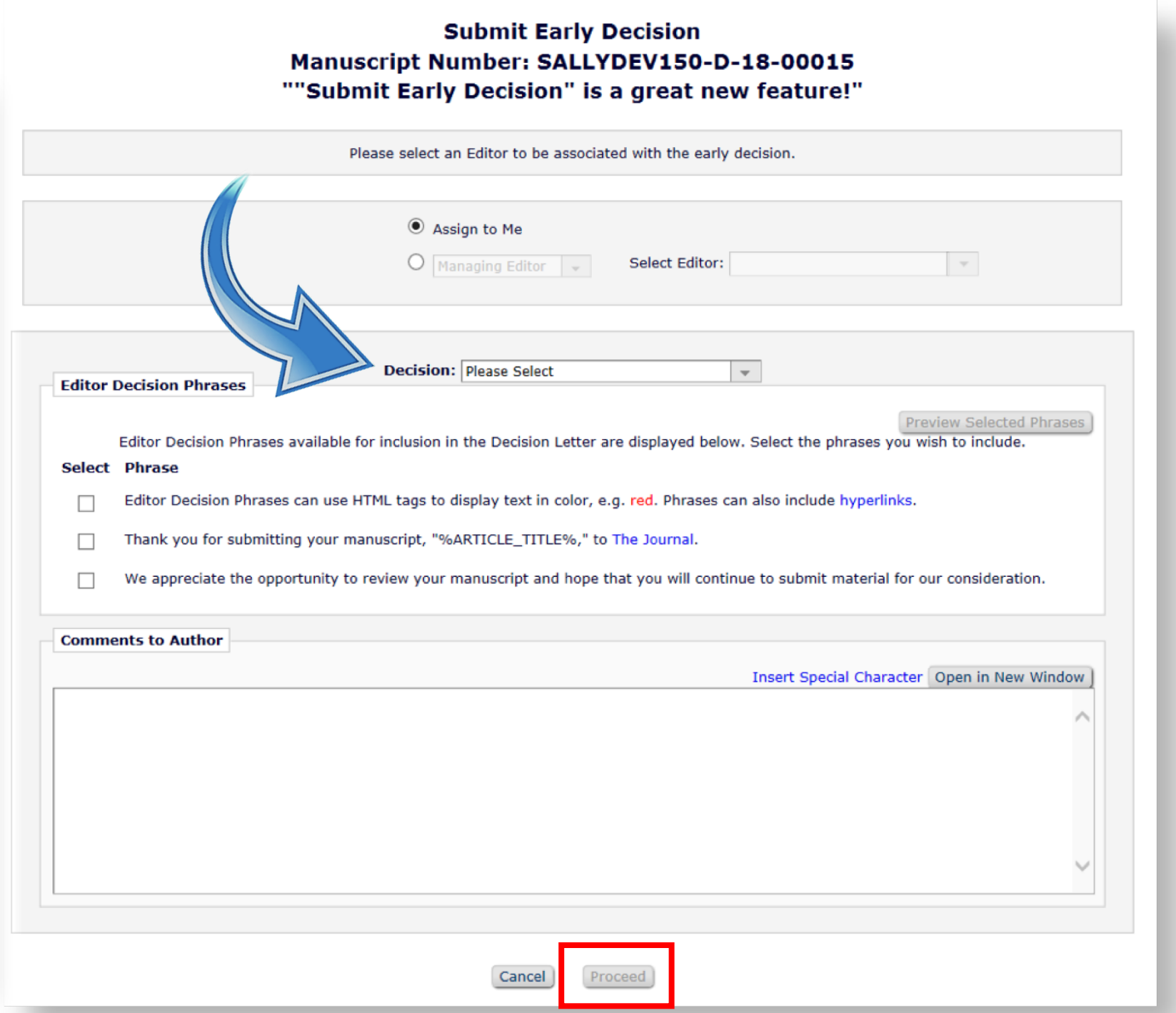
Staff Editor Must Select an Editor to be Assigned

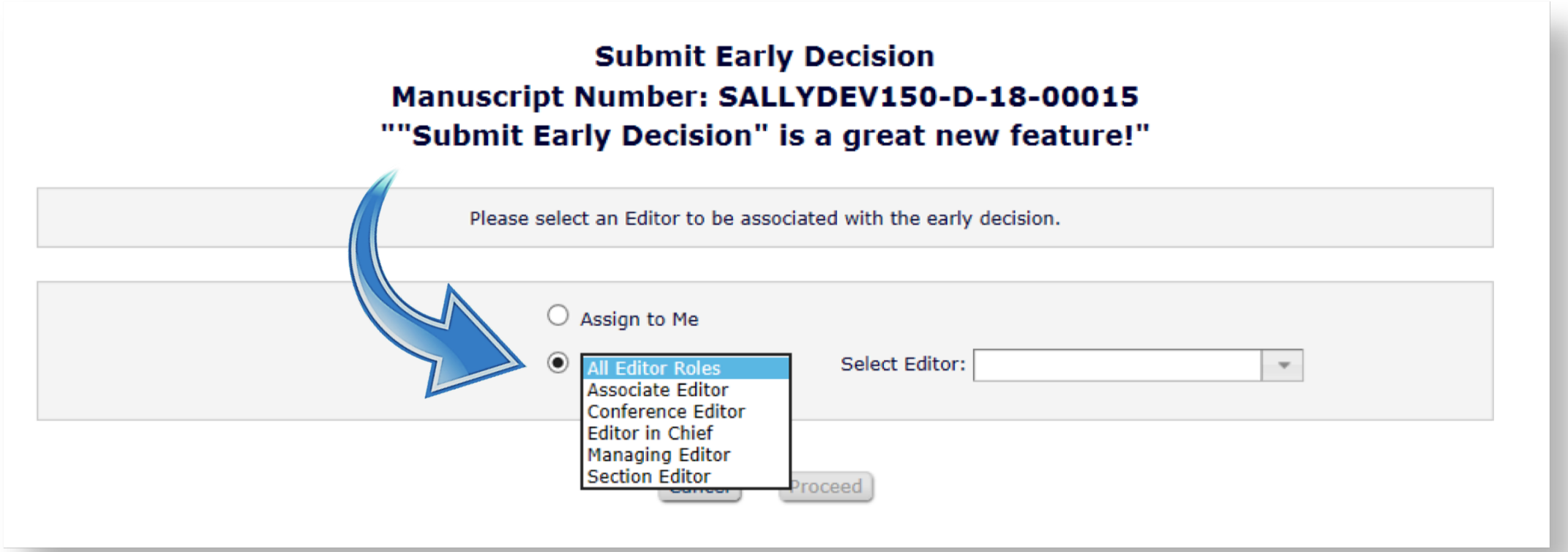


The Staff Editor can select an Editor to be assigned “behind-the-scenes”:

- Select “Assign to Me” (if they have “Make a Decision” permission)
- Select an Editor Role and a user with that Role

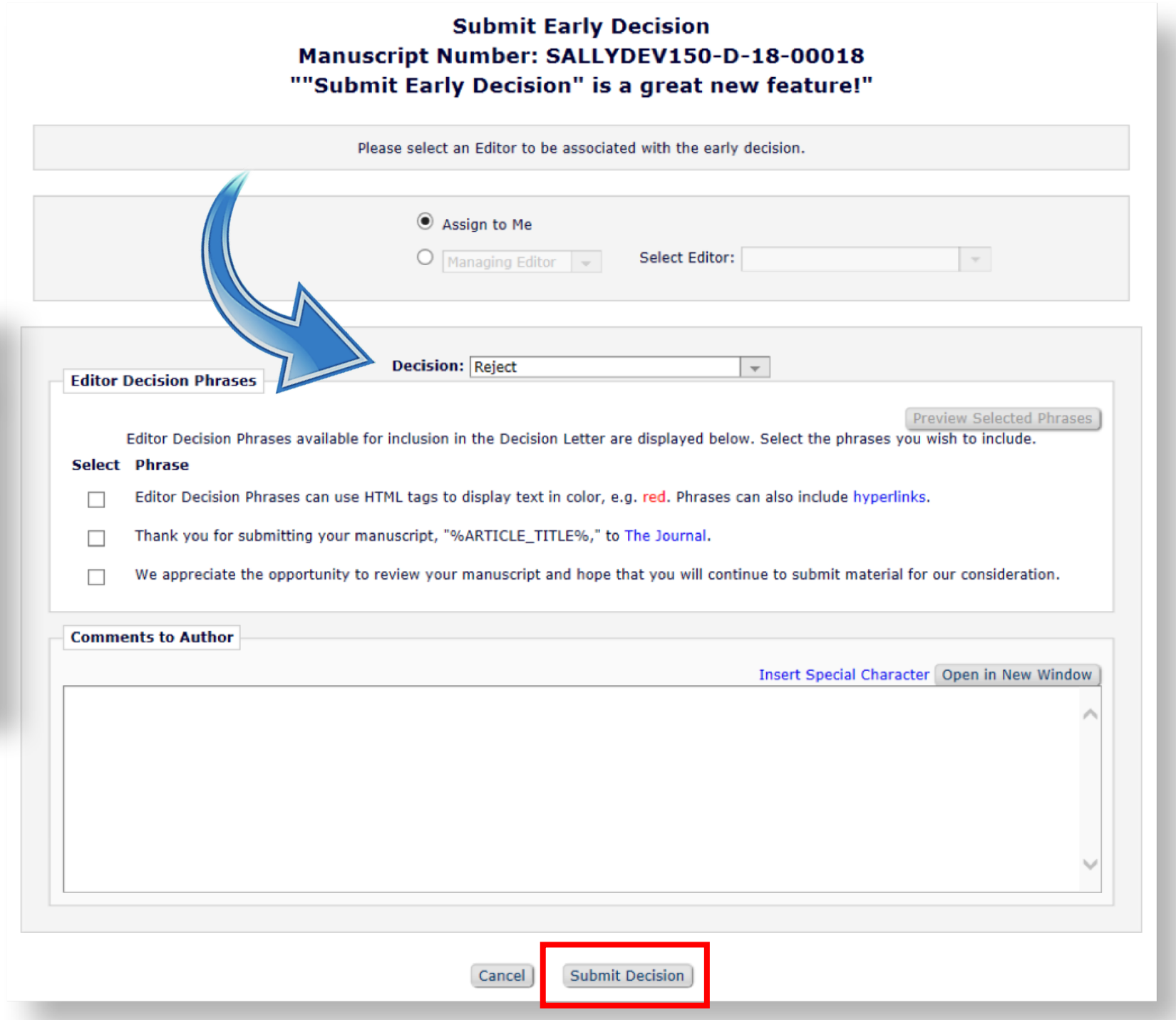
- The page refreshes when an Editor has been selected
- 'Editor Decision Phrases' are displayed (if they are configured for the Editor Form)
- 'Comments to Author' is always displayed
- The [**Proceed**] or [**Submit Decision**] button is disabled until a decision term is selected

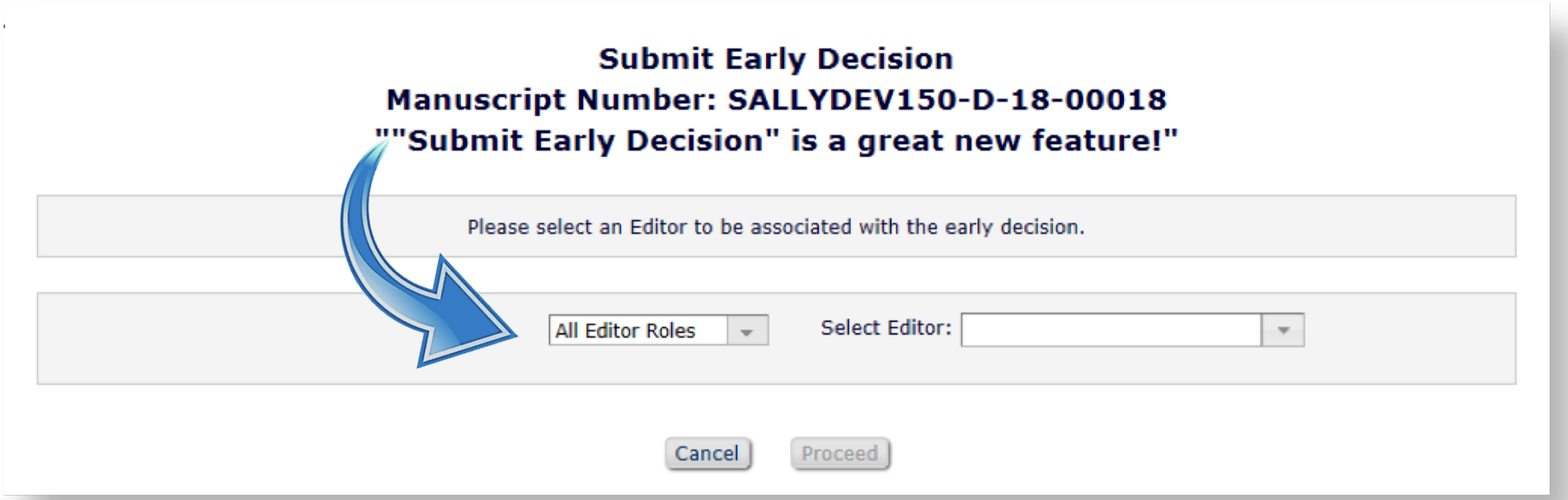




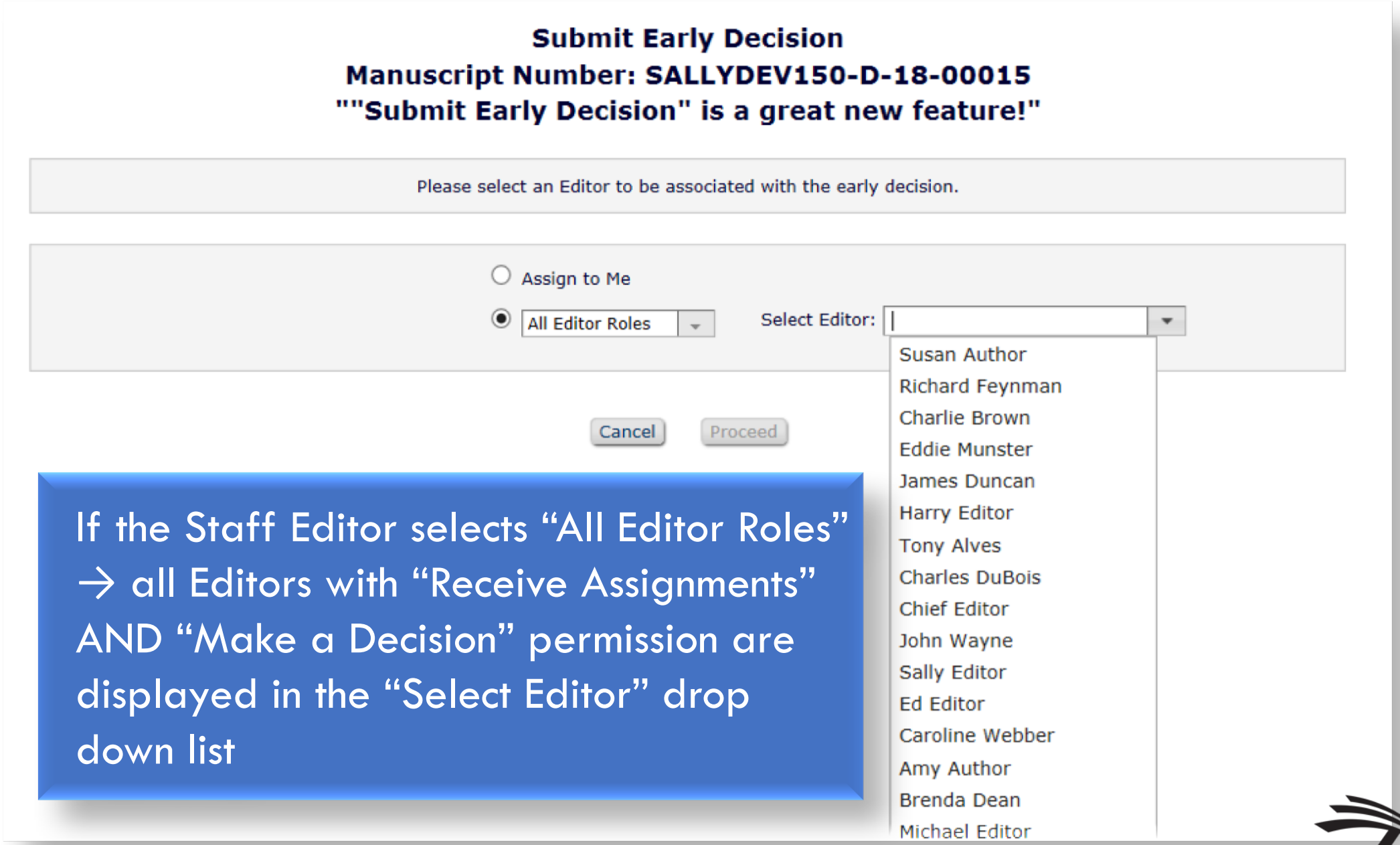
If the Staff Editors do not assign the submission to themselves they can select from “All Editor Roles” OR select a specific Editor Role

The [**Submit Decision**] button is displayed if the Staff Editor does not have "Notify Author of Editor's Decision when Editor Chain is Complete" permission

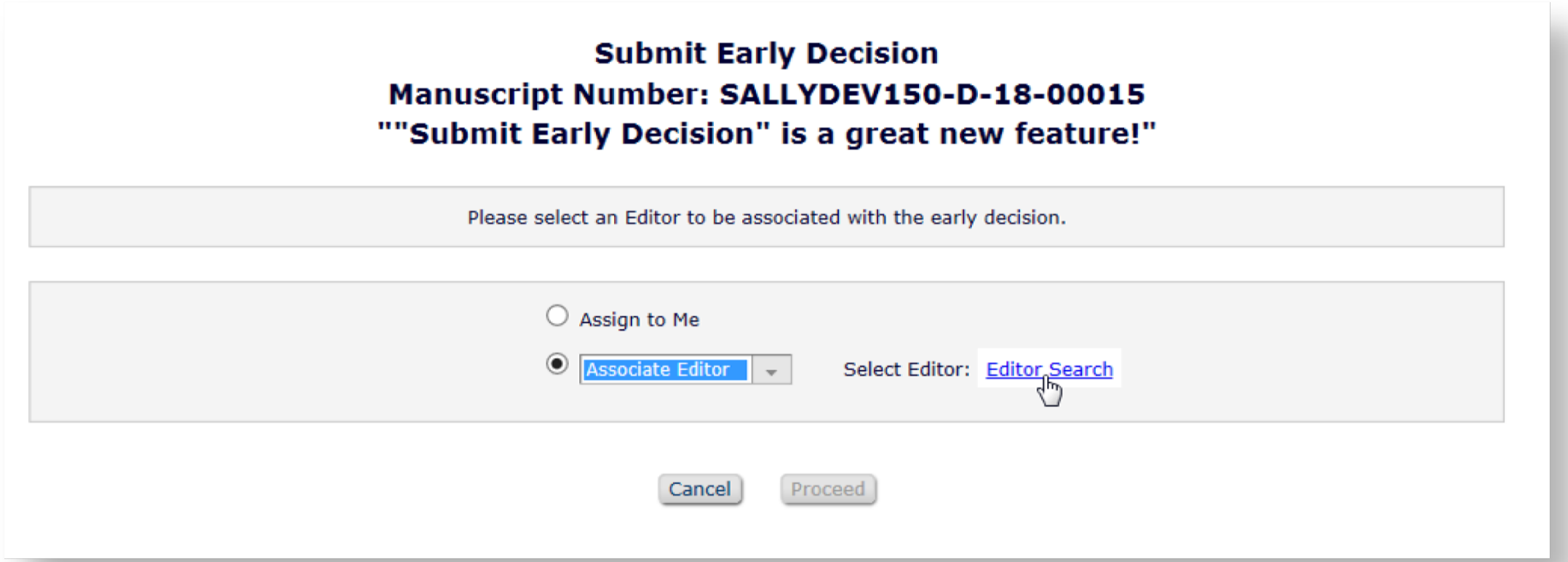




The “Assign to Me” radio button is suppressed if the Staff Editor does not have “Make a Decision” permission

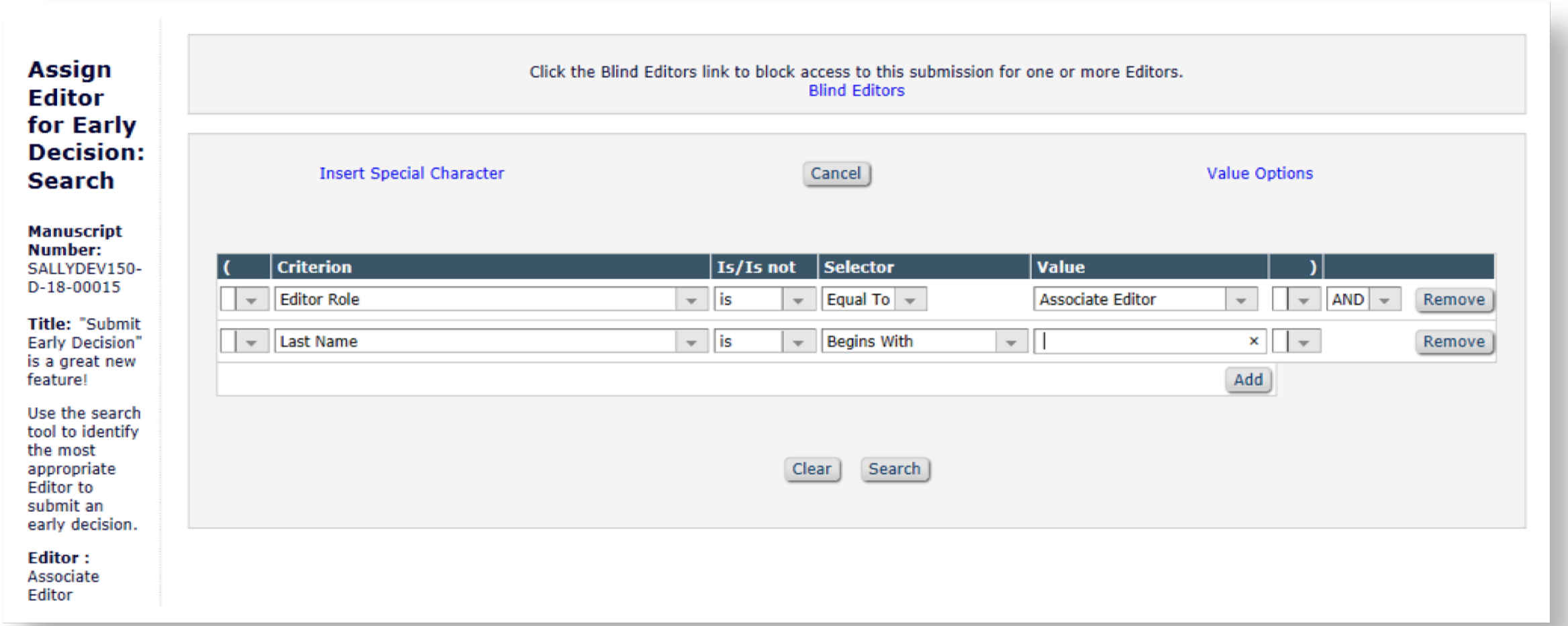


If the Staff Editor selects “All Editor Roles” → all Editors with “Receive Assignments” AND “Make a Decision” permission are displayed in the “Select Editor” drop down list



The “Select Editor” mechanism depends on the Editor Role:

- An “Editor Search” link is displayed if “Always Use Search-based selection for Editor Chain Assignment / Replacement” is enabled for the Role
- Otherwise, the Editors are presented in a dropdown list



The selected Editor Role:

- Is selected by default on the “Search” page
- Can be changed on-the-fly

Assign Editor for Early Decision: Select

Manuscript Number: SALLYDEV150-D-18-00015

Title: "Submit Early Decision" is a great new feature!

The following have been identified as candidates to submit an early decision. Select the Editor and click 'Assign Selected Editor' or click 'Search Again' to search for a different Editor.

Editor : 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 (7 total People Matches) Display 50 results per page.

Select	Editor Role	Editor Name	Current Assignments	# Classification Matches	Classification Matches	Available during next 30 days
○	Associate Editor	Tony Alves	0	0		Yes
○	Associate Editor	Susan Author	0	0		Yes
◉	Associate Editor	Charlie Snoopy Brown, PhD	0	0		Yes
○	Associate Editor	James Duncan	0	0		Yes
○	Associate Editor	Harry Editor	4	0		Yes
○	Associate Editor	Richard Feynman, PhD	0	0		Yes
○	Associate Editor	Eddie Munster	0	0		Yes

Page: 1 of 1 (7 total People Matches) Display 50 results per page.

Search Again

Cancel | Assign Selected Editor

The Staff Editor selects an Editor and clicks [**Assign Selected Editor**]

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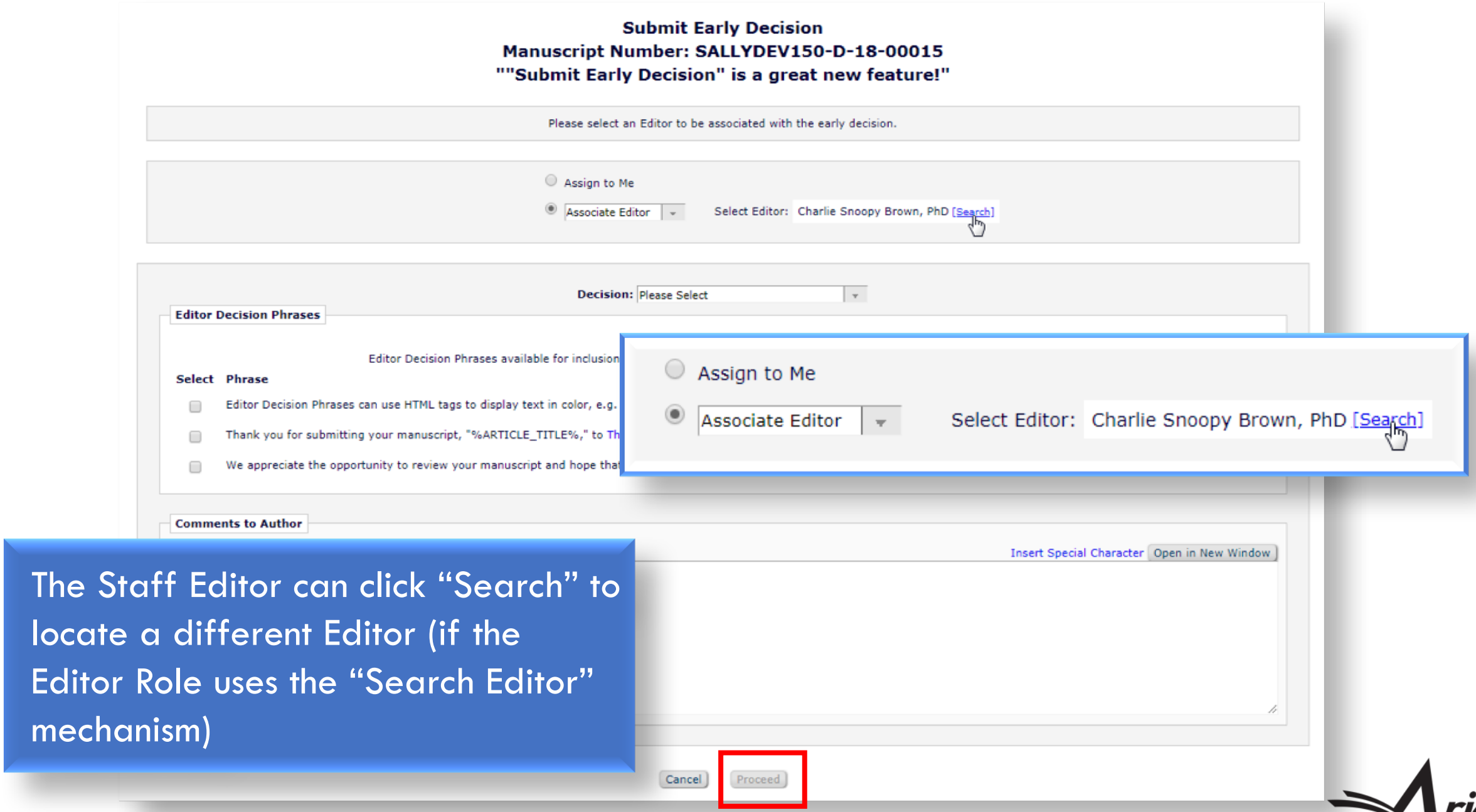
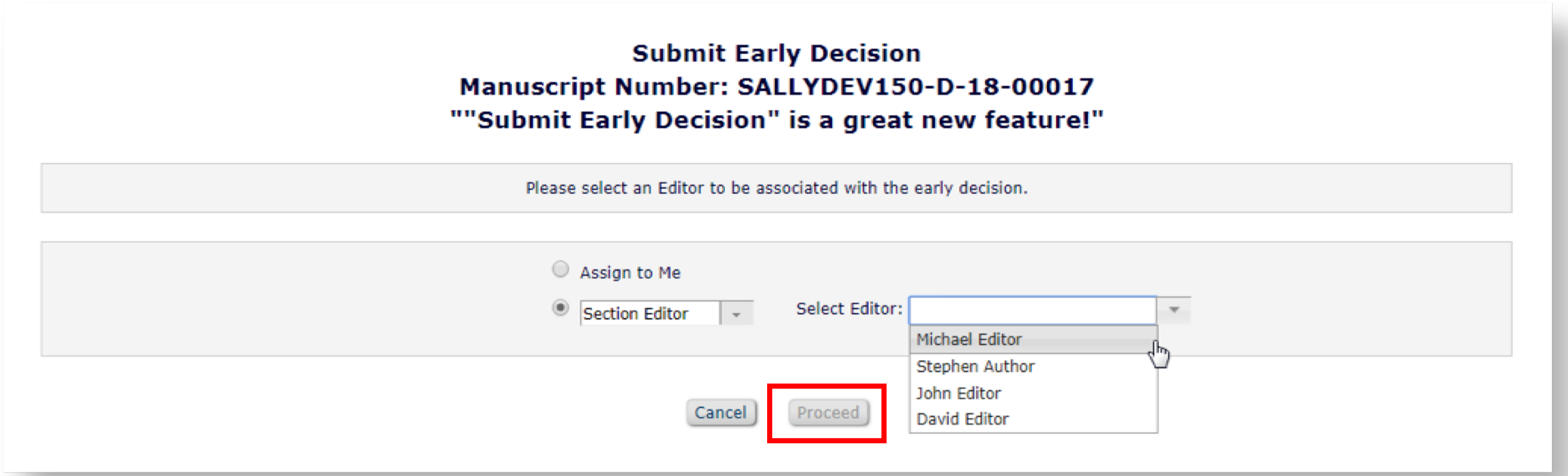
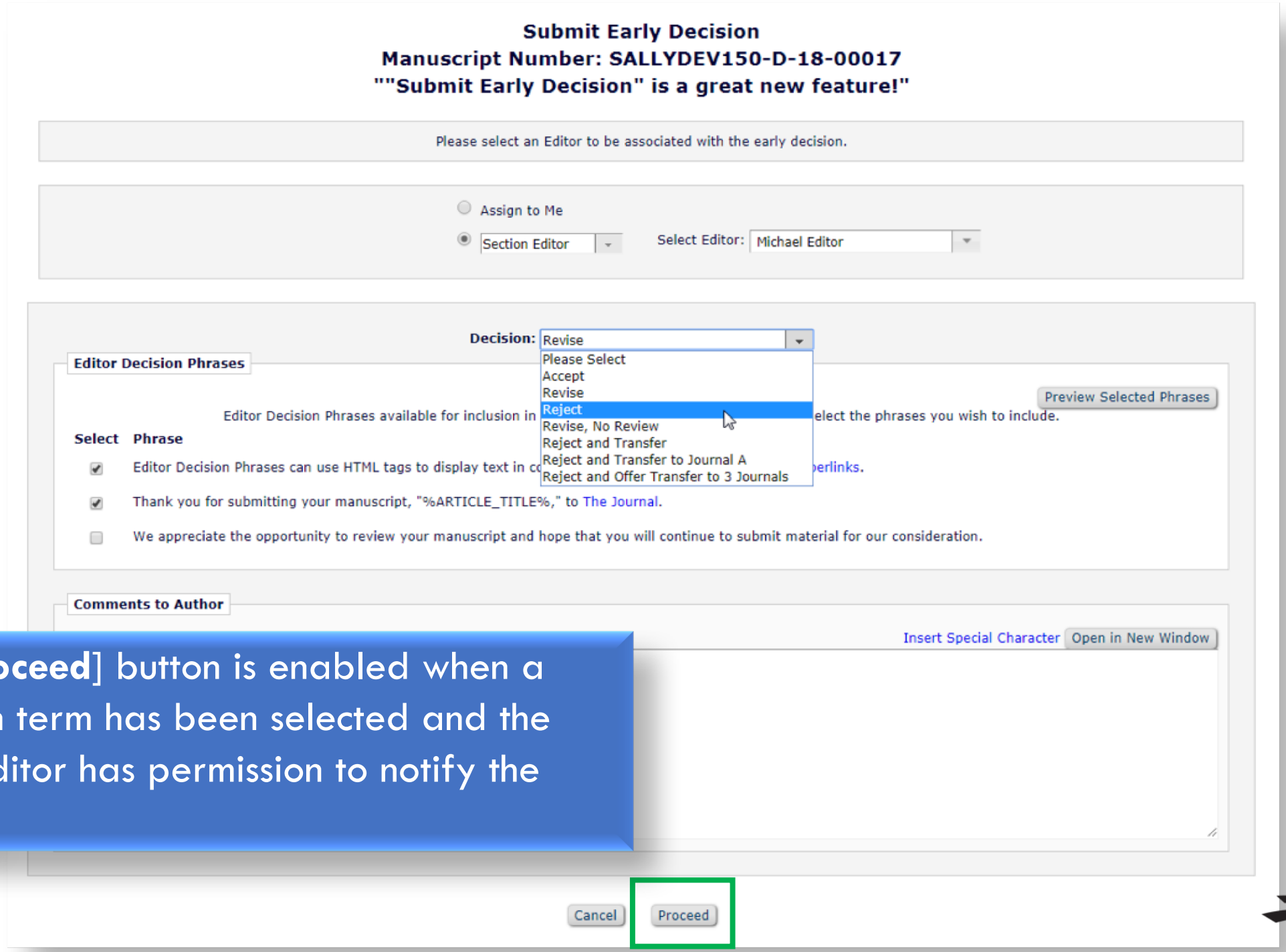


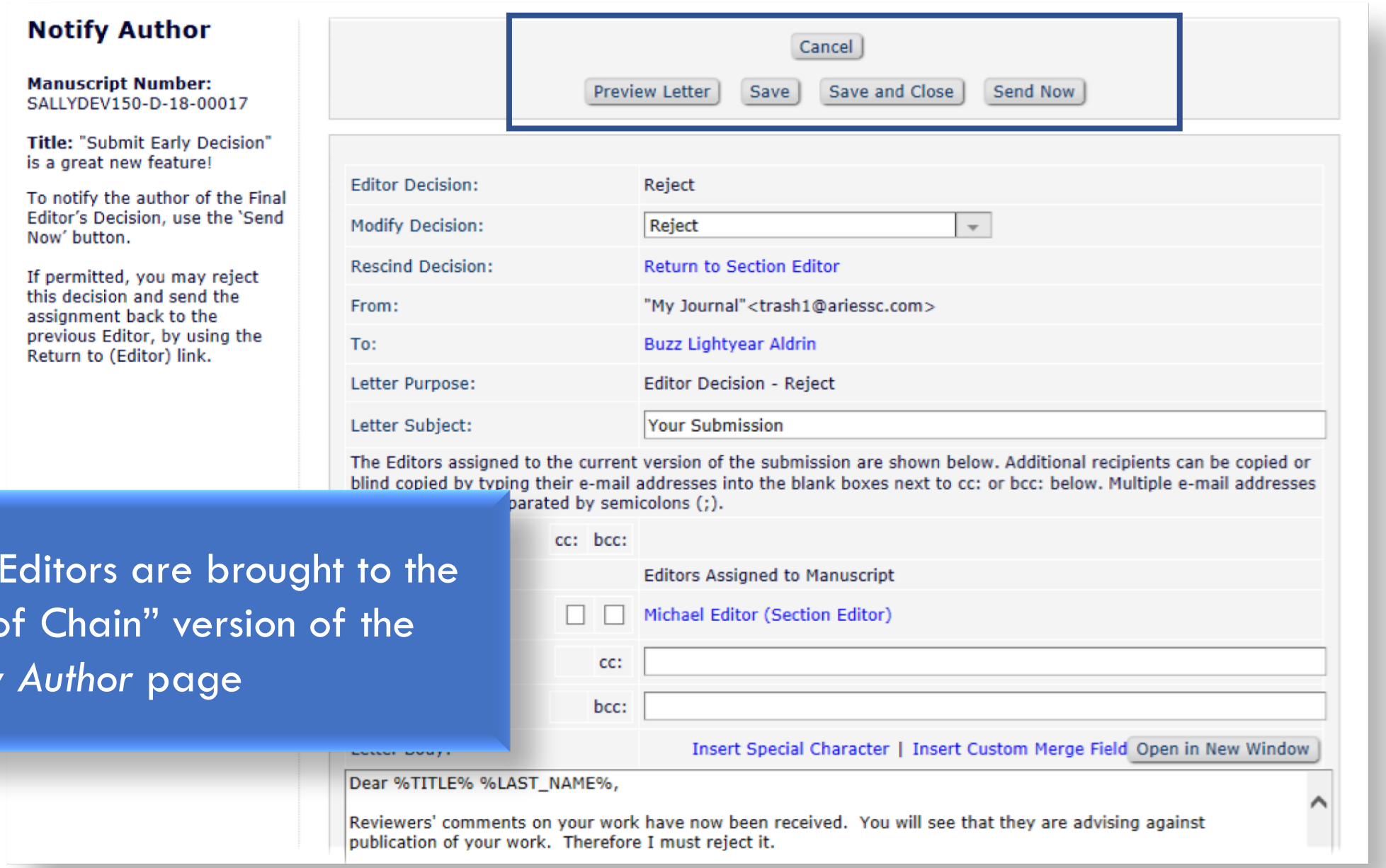
The Staff Editor can click “Search” to locate a different Editor (if the Editor Role uses the “Search Editor” mechanism)



Only uses with the selected Editor Role are displayed in the drop down list



The [**Proceed**] button is enabled when a decision term has been selected and the Staff Editor has permission to notify the Author



Staff Editors are brought to the "End of Chain" version of the *Notify Author* page

If the Staff Editor notifies the Author of a “Reject” or “Accept” decision:

- The submission moves to the “Submissions with Editor’s Decision” folder
- The assigned Editor’s name and the decision are displayed

All Submissions with Editor's Decision - Sally Editor, PhD

Contents: All submissions for which an Editor has submitted a decision.

Page: 1 of 2 (41 total submissions) 1 2 >> >| Display 25 results per page.

Action	Manuscript Number	Article Type	Section/ Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Name	Editor Decision	Author Notified Date
View Submission Details History Unassign Editor File Inventory Edit Submission Solicit Commentary Set Final Disposition Initiate Production View Reviews and Comments Rescind Decision Similar Articles in MEDLINE Send E-mail Linked Submissions	SALLYDEV150-D-18-00017	Original Study		"Submit Early Decision" is a great new feature!	Buzz Lightyear Aldrin, PhD	Jun 6 2018 11:45AM	Jun 6 2018 12:16PM	Reject	Michael Editor	Reject	Jun 6 2018 12:16PM

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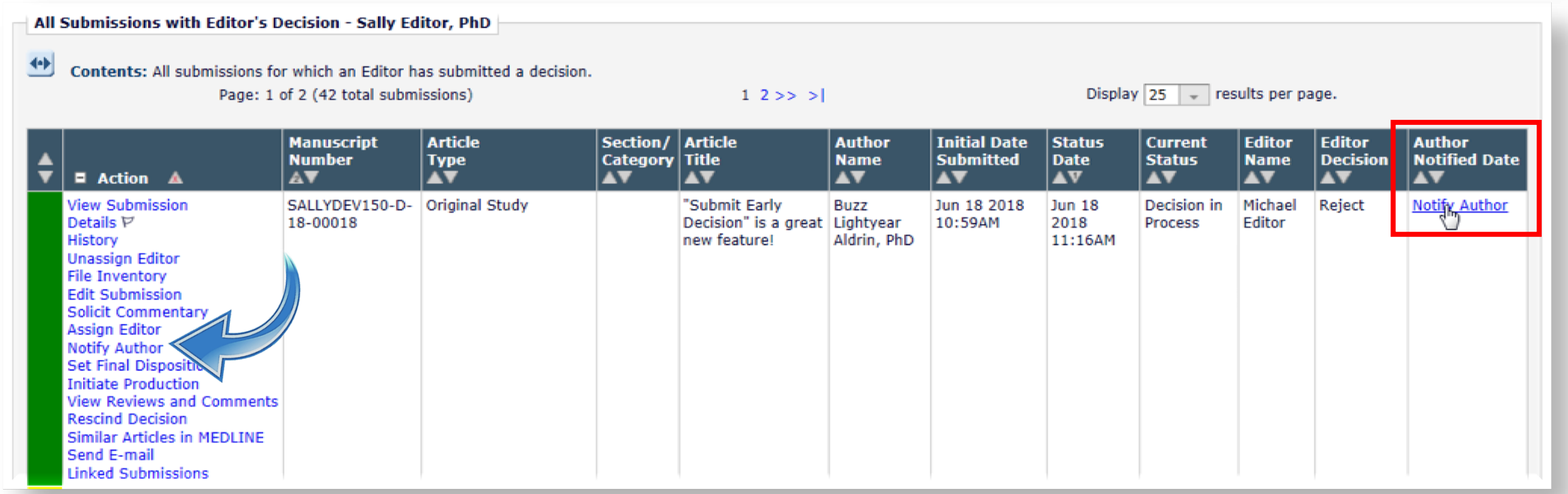
If the Staff Editor does NOT have permission to "Notify Author of Editor's Decision when Editor Chain is Complete":

- The paper still moves to the "Submissions with Editor's Decision" folder
- But another Editor must notify the Author

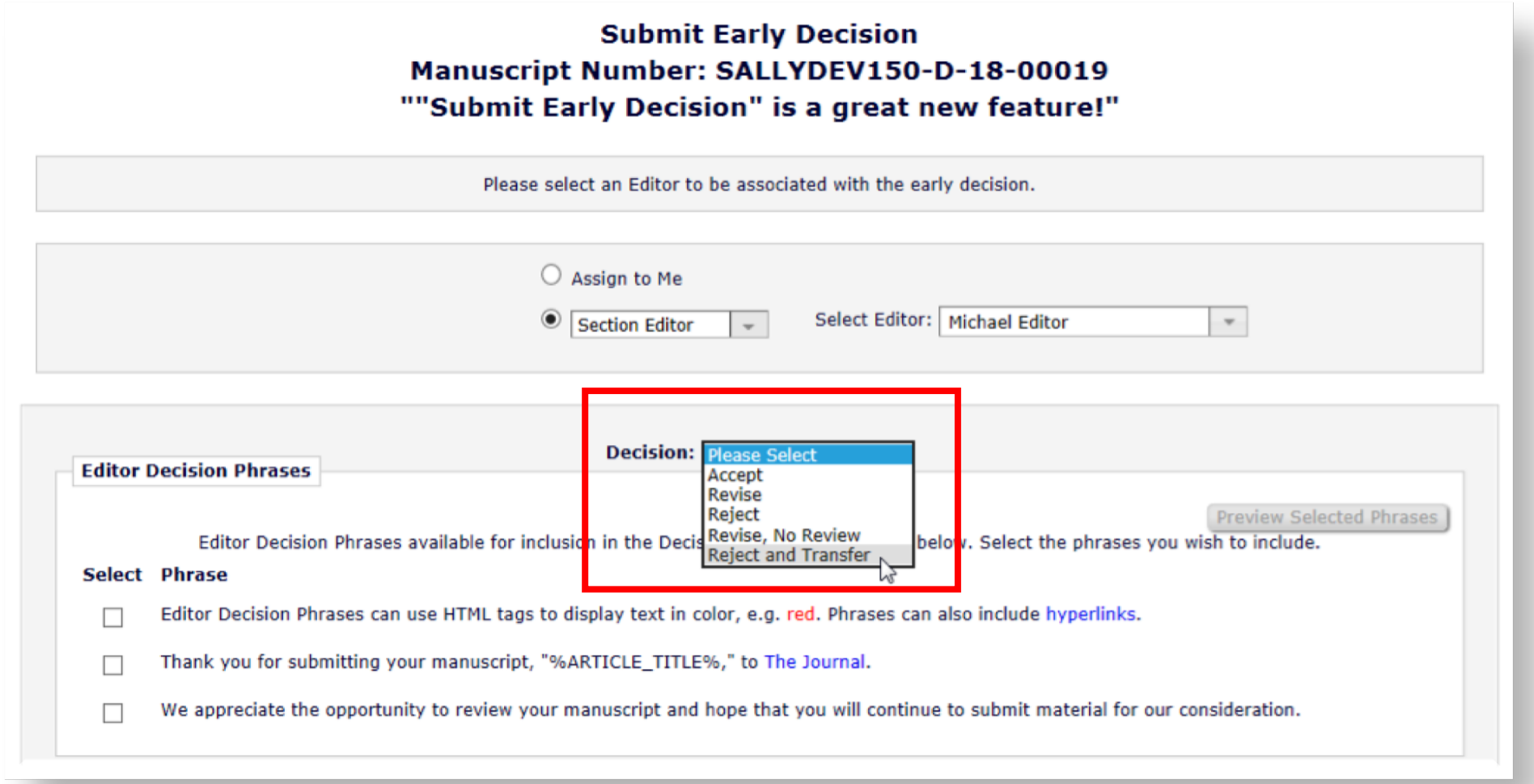


All Submissions with Editor's Decision - Sally Editor, PhD

Contents: All submissions for which an Editor has submitted a decision.

Page: 1 of 2 (42 total submissions) 1 2 >> >| Display 25 results per page.

Action	Manuscript Number	Article Type	Section/ Category	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor Name	Editor Decision	Author Notified Date
View Submission Details History Unassign Editor File Inventory Edit Submission Solicit Commentary Assign Editor Notify Author Set Final Disposition Initiate Production View Reviews and Comments Rescind Decision Similar Articles in MEDLINE Send E-mail Linked Submissions	SALLYDEV150-D-18-00018	Original Study		"Submit Early Decision" is a great new feature!	Buzz Lightyear Aldrin, PhD	Jun 18 2018 10:59AM	Jun 18 2018 11:16AM	Decision in Process	Michael Editor	Reject	Notify Author



"Submit Early Decision" supports the "Reject and Transfer" workflow

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Like the standard “Reject and Transfer” workflow, the Staff Editor selects the Transfer Target Publications to be presented to the Author for selection

Notify Author

Manuscript Number:
SALLYDEV150-D-18-00020

Title: "Submit Early Decision" is a great new feature!

To notify the author of the Final Editor's Decision, use the 'Send Now' button.

If permitted, you may reject this decision and send the assignment back to the previous Editor, by using the Return to (Editor) link.

Cancel

Preview Letter | Save | Save and Close | Send Now

Editor Decision:	Reject and Transfer
Modify Decision:	Reject and Transfer
Transfer Target Publication(s):	Tony's 15.0 TW Site; Aries Target One; Edit Transfer Target Publications List
Rescind Decision:	Return to Section Editor
From:	"My Journal"<trash1@ariessc.com>
To:	Buzz Lightyear Aldrin
Modify Letter:	Editor Decision - Reject and Transfer
Letter Subject:	Your Submission "Submit Early Decision" is a great new feature!

The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:	bcc:	
		Editors Assigned to Manuscript
☐	☐	Michael Editor (Section Editor)
	cc:	
	bcc:	

Letter Body: Open in New Window

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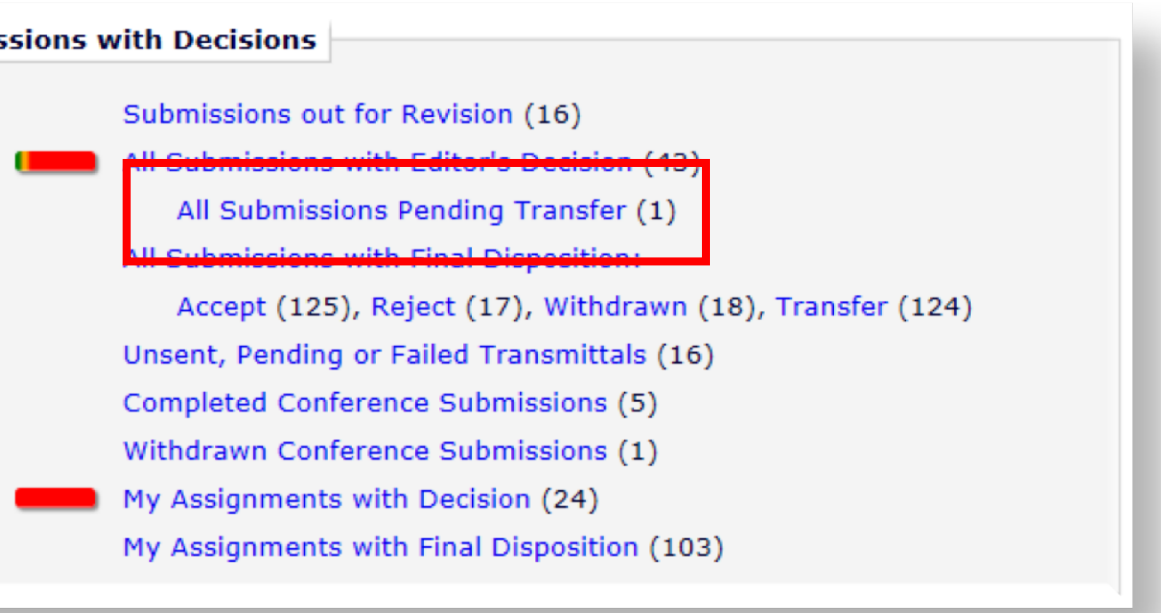
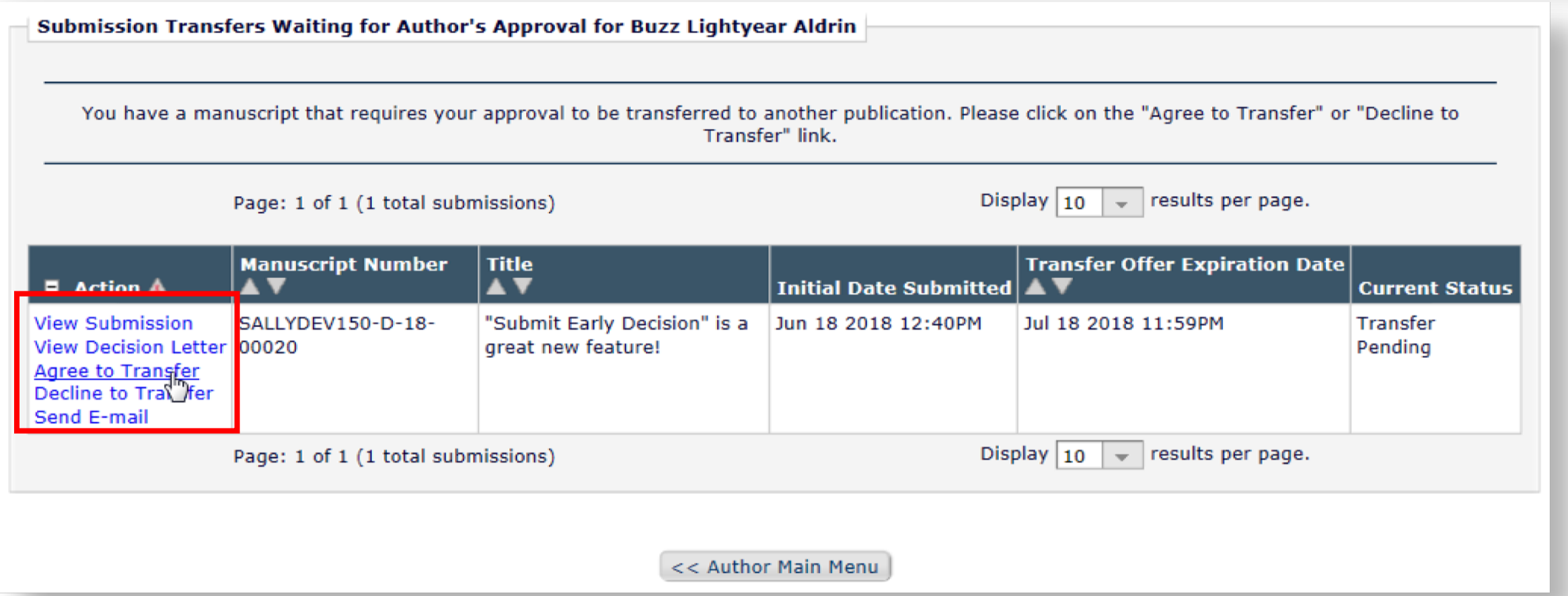
The submission moves to:

- Editor → "All Submissions Pending Transfer"
- Author → "Submission Transfers Waiting for Author's Approval"



The Author agrees or declines to transfer → the standard workflow occurs



Submission Transfers Waiting for Author's Approval for Buzz Lightyear Aldrin

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

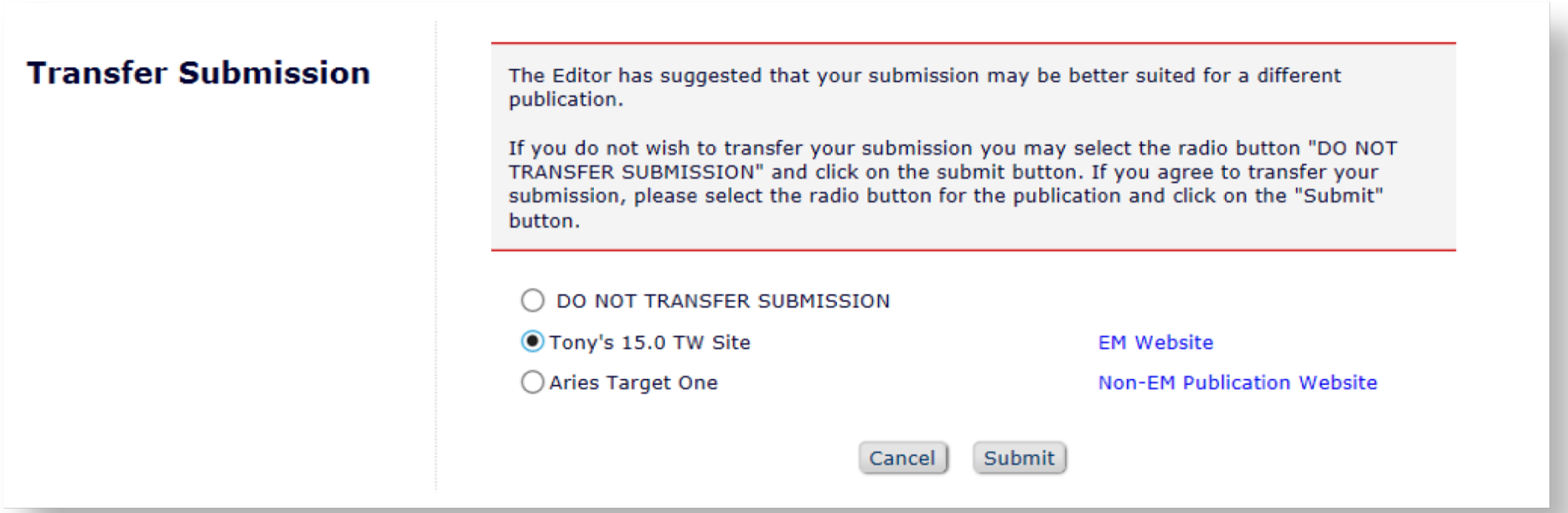
Page: 1 of 1 (1 total submissions) Display 10 results per page.

Action	Manuscript Number	Title	Initial Date Submitted	Transfer Offer Expiration Date	Current Status
View Submission View Decision Letter Agree to Transfer Decline to Transfer Send E-mail	SALLYDEV150-D-18-00020	"Submit Early Decision" is a great new feature!	Jun 18 2018 12:40PM	Jul 18 2018 11:59PM	Transfer Pending

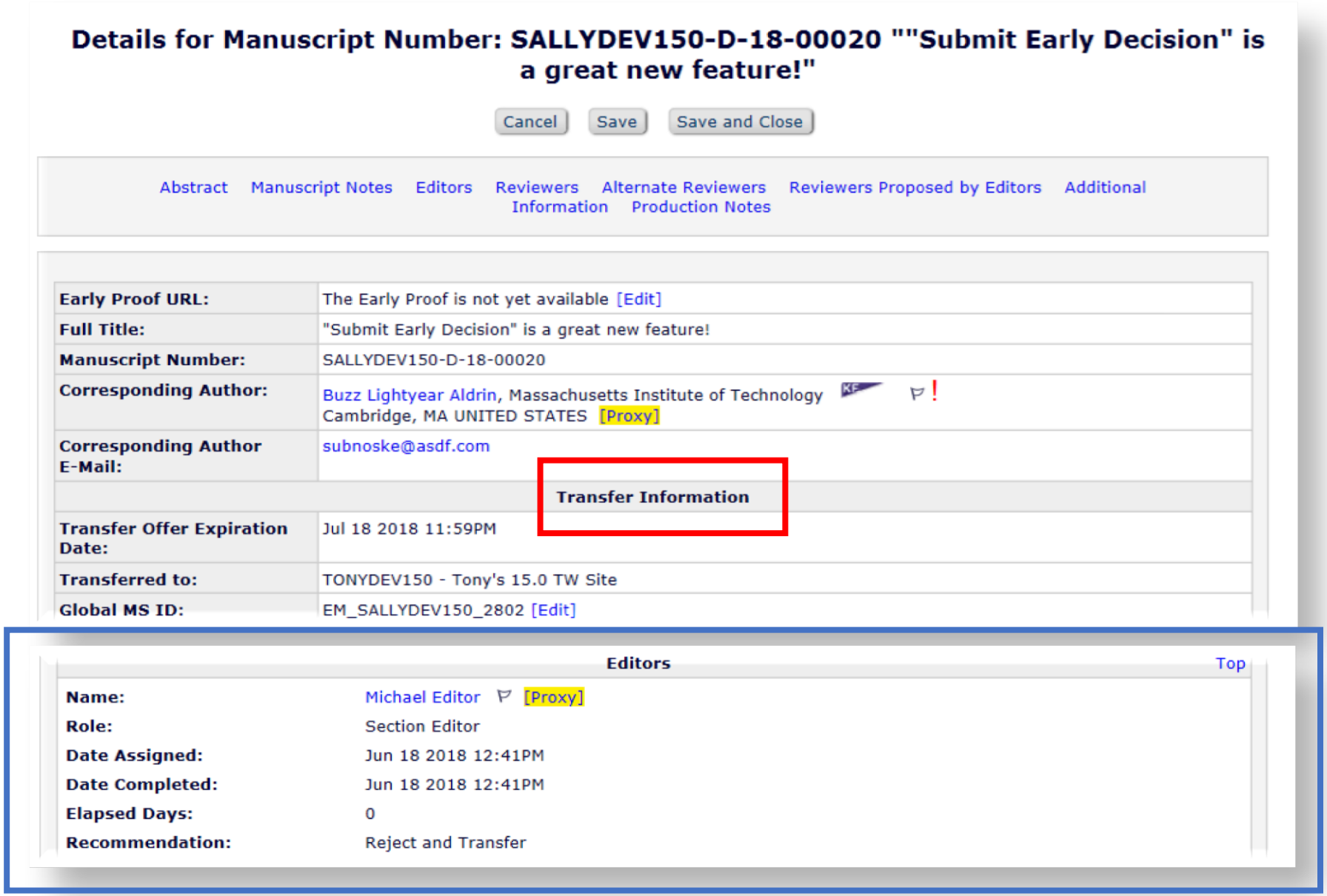
Page: 1 of 1 (1 total submissions) Display 10 results per page.

<< Author Main Menu

The Author selects the Transfer Target publication and clicks [**Submit**]



The Selected Editor's Decision is Displayed on *Details*



Details for Manuscript Number: SALLYDEV150-D-18-00020 ""Submit Early Decision" is a great new feature!"

Cancel | Save | Save and Close

Abstract | Manuscript Notes | Editors | Reviewers | Alternate Reviewers | Reviewers Proposed by Editors | Additional Information | Production Notes

Early Proof URL:	The Early Proof is not yet available [Edit]
Full Title:	"Submit Early Decision" is a great new feature!
Manuscript Number:	SALLYDEV150-D-18-00020
Corresponding Author:	Buzz Lightyear Aldrin, Massachusetts Institute of Technology Cambridge, MA UNITED STATES [Proxy]
Corresponding Author E-Mail:	subnoske@asdf.com
Transfer Information	
Transfer Offer Expiration Date:	Jul 18 2018 11:59PM
Transferred to:	TONYDEV150 - Tony's 15.0 TW Site
Global MS ID:	EM_SALLYDEV150_2802 [Edit]

Editors Top

Name:	Michael Editor [Proxy]
Role:	Section Editor
Date Assigned:	Jun 18 2018 12:41PM
Date Completed:	Jun 18 2018 12:41PM
Elapsed Days:	0
Recommendation:	Reject and Transfer

BEHIND
THE
SCENES

RoleManager – **Staff Editor**

- "Receive New Submission in 'New Submissions Requiring Assignment'" permission
- "Submit Early Decision on New Submission" permission
  - Displays "Submit Early Decision" Action Link in:
    - ✓ "New Submissions" folder
    - ✓ "New Submissions Requiring Assignment" folder
    - ✓ "Direct-to-Editor New Submissions" folder
    - ✓ "Search Submission – Search Results" folder (when also located in one of the previous three folders)
- "Notify Author of Editor's Decision when Editor Chain is Complete" permission
  - Optional permission – otherwise, another Editor must notify the Author
  - Delivers the Editor to the *Notify Author* page

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RoleManager – **Assigned Editors**

- "Receive Assignments" permission
- "Make a Decision" permission
- "Always Use Search-based selection for Editor Chain Assignment / Replacement" permission
  - Optional permission – controls the mechanism used to identify the Editor who will be assigned

Edit Role Definition

Role Name:* Managing Editor

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

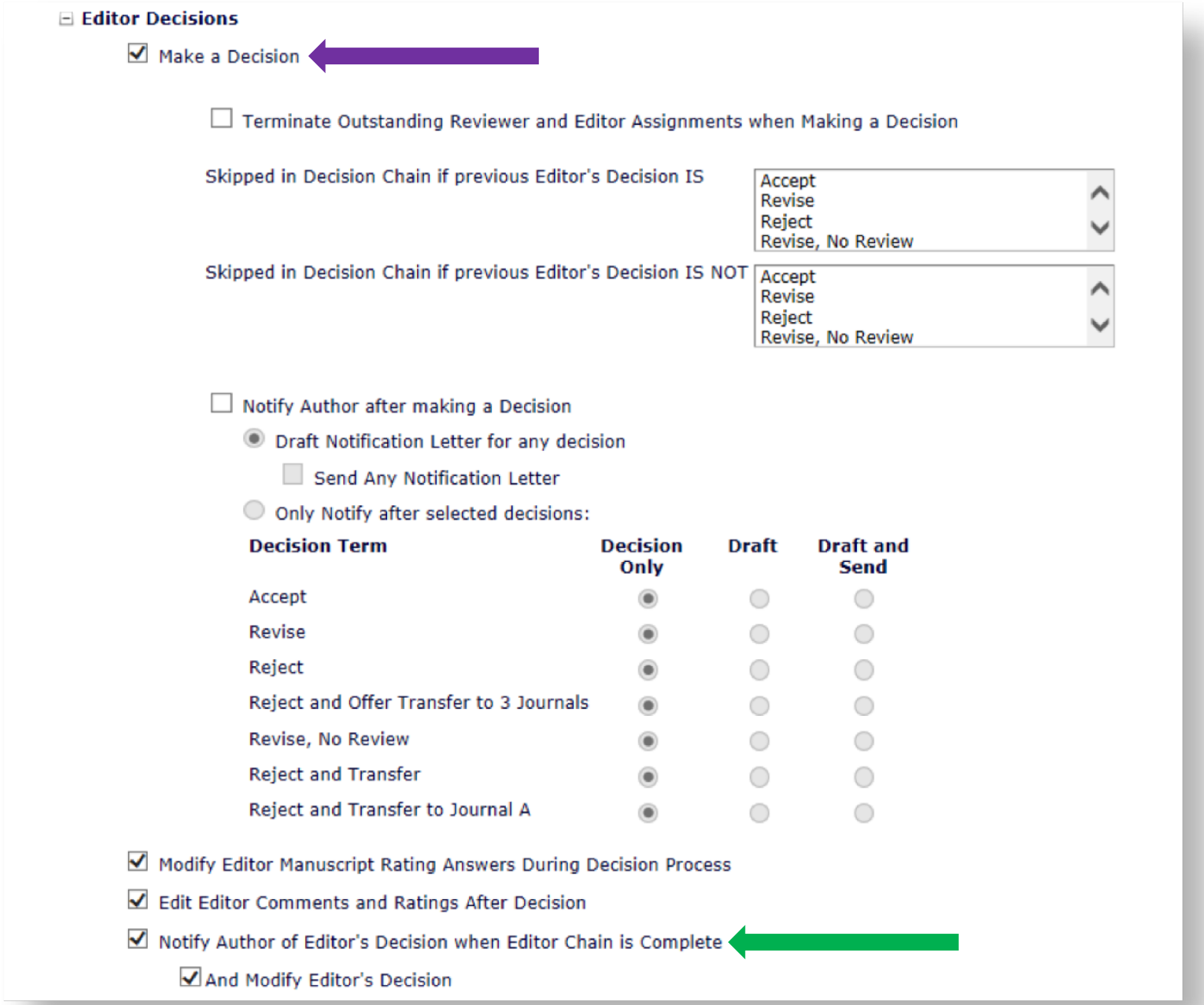
- [x] Receive New Submissions in 'New Submissions Requiring Assignment' Folder
  - [x] Perform Technical Check (submission received in 'New Submissions' Folder)
  - [x] Submit Early Decision on New Submissions
- [x] Receive New Transferred Submissions in 'Transferred Submissions' Folder
- [x] Submit Manuscript as an Editor
  - [ ] Restrict to 'Editor/Publisher Use Only' Article Types
  - [x] Can set 'Accept on Submission' Final Disposition on 'Editor/Publisher Use Only' Types

Editor Assignment

- [x] Receive Assignments

  Classic Method of Editor Assignment

  - (•) Receive Assignments without Invitation
  - ( ) Receive Invitations for Assignments
- [x] Always Use Search-based selection for Editor Chain Assignment / Replacement (i.e. if not Applied Automatically by System)


Editor Decisions
Make a Decision
Terminate Outstanding Reviewer and Editor Assignments when Making a Decision
Skipped in Decision Chain if previous Editor's Decision IS
Accept
Revise
Reject
Revise, No Review
Skipped in Decision Chain if previous Editor's Decision IS NOT
Accept
Revise
Reject
Revise, No Review
Notify Author after making a Decision
Draft Notification Letter for any decision
Send Any Notification Letter
Only Notify after selected decisions:
Decision Term
Decision Only
Draft
Draft and Send
Accept
Revise
Reject
Reject and Offer Transfer to 3 Journals
Revise, No Review
Reject and Transfer
Reject and Transfer to Journal A
Modify Editor Manuscript Rating Answers During Decision Process
Edit Editor Comments and Ratings After Decision
Notify Author of Editor's Decision when Editor Chain is Complete
And Modify Editor's Decision

PolicyManager – Editor Decision Terms

- Identify the decision terms that should be available for early decision
- Add or edit an existing decision term and select the checkbox labeled “Allow Early Decision”

Add/Edit Editor Decision Term

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

The Reviewer Notification Letter is a letter which can be sent to each Reviewer at the time the Author Notification Letter is sent.

The Document Status is the status displayed in the system when the decision is made.

Each decision term must be mapped to a Decision Family value of Accept, Reject, Revise or Reject and Transfer. This is used internally by {0} to push submissions through the system properly.

Decision terms mapped to the Reject and Transfer Decision Family trigger additional functionality that allows the Author to agree or decline to transfer the submission to another publication. Please note that you must also configure at least one transfer target publication in AdminManager.

Editor Decision Term: Reject

Author Notification Letter Options:

Default	Optional	Letter Purpose
○	☐	None Selected
○	☐	Editor Decision - Accept
◉	☑	Editor Decision - Reject
○	☐	Editor Decision - Revise
○	☐	Editor Decision - Reject and Transfer

Reviewer Notification Letter: Reviewer Notification of Reject Decision

Document Status: Reject

Decision Family: Reject

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

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

Cancel Submit

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Editor Decision Terms

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

Cancel | Add New Term

Update Order

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Alternative Text for Authors	Decision Family	Allow Early Decision		
1	Accept	Editor Decision - Accept	None	Accept		Accept	✓	Remove	Edit
2	Revise	Editor Decision - Revise	Reviewer Notification of Revise Decision	Revise		Revise	✓	Remove	Edit
3	Reject	Editor Decision - Reject	Reviewer Notification of Reject Decision	Reject		Reject	✓	Remove	Edit
4	Reject and Offer Transfer to 3 Journals	Editor Decision - Reject and Transfer	None	Transfer Pending		Reject and Transfer		Remove	Edit
5	Revise, No Review	Editor Decision - Revise	None	Revise		Revise	✓	Remove	Edit
6	Reject and Transfer	Editor Decision - Reject and Transfer	None	Transfer Pending		Reject and Transfer	✓	Remove	Edit
7	Reject and Transfer to Journal A	Editor Decision - Reject and Transfer	None	Transfer Pending		Reject and Transfer		Remove	Edit

Update Order

Cancel | Add New Term

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Q&A