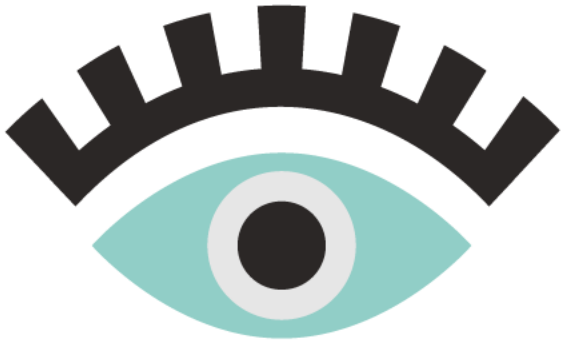
EEMUG 2020

#EEMUG2020

Transactional APIs and other APIs



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Nick Andrews, Managing Director,
DataSalon

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Agenda

- Current APIs & SFTP integrations (16.0 & 16.1)
- Guest Speaker – DataSalon case study
- Upcoming API integrations (17.0+)

Current APIs & SFTP Integrations

EM Version 16.0 & 16.1

Current EM/PM APIs

- 3rd party Analysis Tools
  - Similarity Check (iThenticate)
  - CheckCIF
  - Reference Checking
- Reviewer Locator Services
  - Reviewer Discovery (Pivot)
  - Generic Ext. Reviewer DB Search
  - Generic API coming
- “Suggest Editor” Service
- Taxonomy Ingest/Export
- Article Processing Charges
- ORCID API
  - Retrieve Authenticated ORCID iD
  - Register/login via Authenticated ORCID iD
  - Deposit review records to ORCID

Current Aries APIs, cont'd

- Submission Ingest from Submission partners
  - Workflow Event Notifications to submission partners, also file transfers for Send Back to Author, Revise, and Transfer
- SSO/Federated Identity Mgmt
- ProduXion Manager and Task manager file transfer
- Web Services
  - Export submission metadata
  - Ingest/overwrite submission metadata
  - Webhook notifications

EM Ingest & API Push Notifications

- “EM Ingest” = Import of files & metadata from external submission system or preprint server
- Submission is SFTP'ed to EM using “EM Ingest”. Submission can be triaged by journal staff or placed directly into submission workflow.
- Submission can be modified on external site, and re-ftp’ed to EM after Send Back to Author or Revise decision. Submission can be transferred back to Submission partner for transfer to another journal.
- API push notifications from EM:
  - Notify external partner of success/failure
  - Submission sent back to Author (metadata and files)
  - Revise decision (metadata and files)
  - Transfer (metadata and files)
  - Correspondence/letters to Author/co-authors

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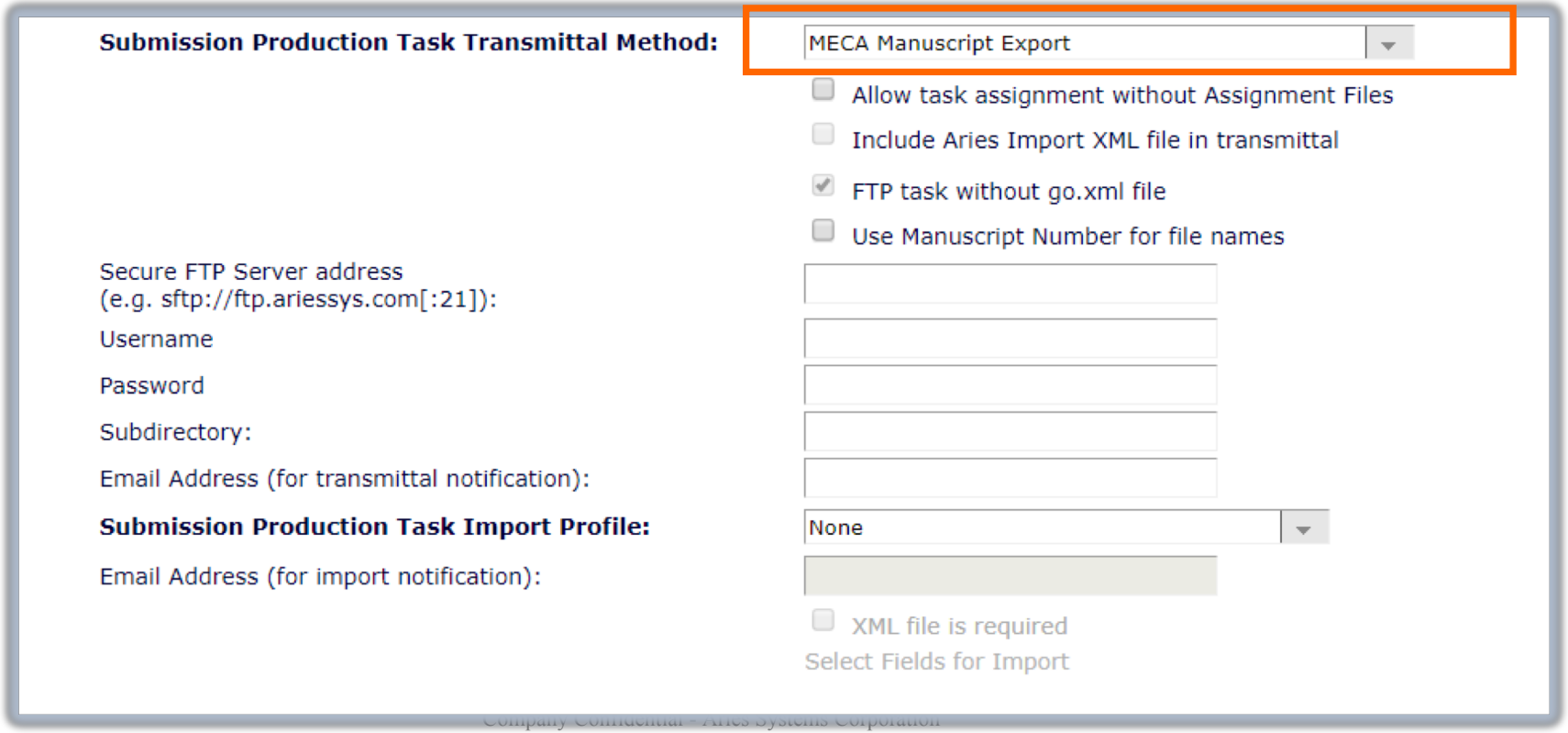
Export of files & metadata using a Task

Files can be SFTP'ed to Content Management System or preprint server, the NIHMS, or a vendor using a Task Export. This can be a "one-way" or "milestone" task export accompanied by article metadata XML (JATS XML format).



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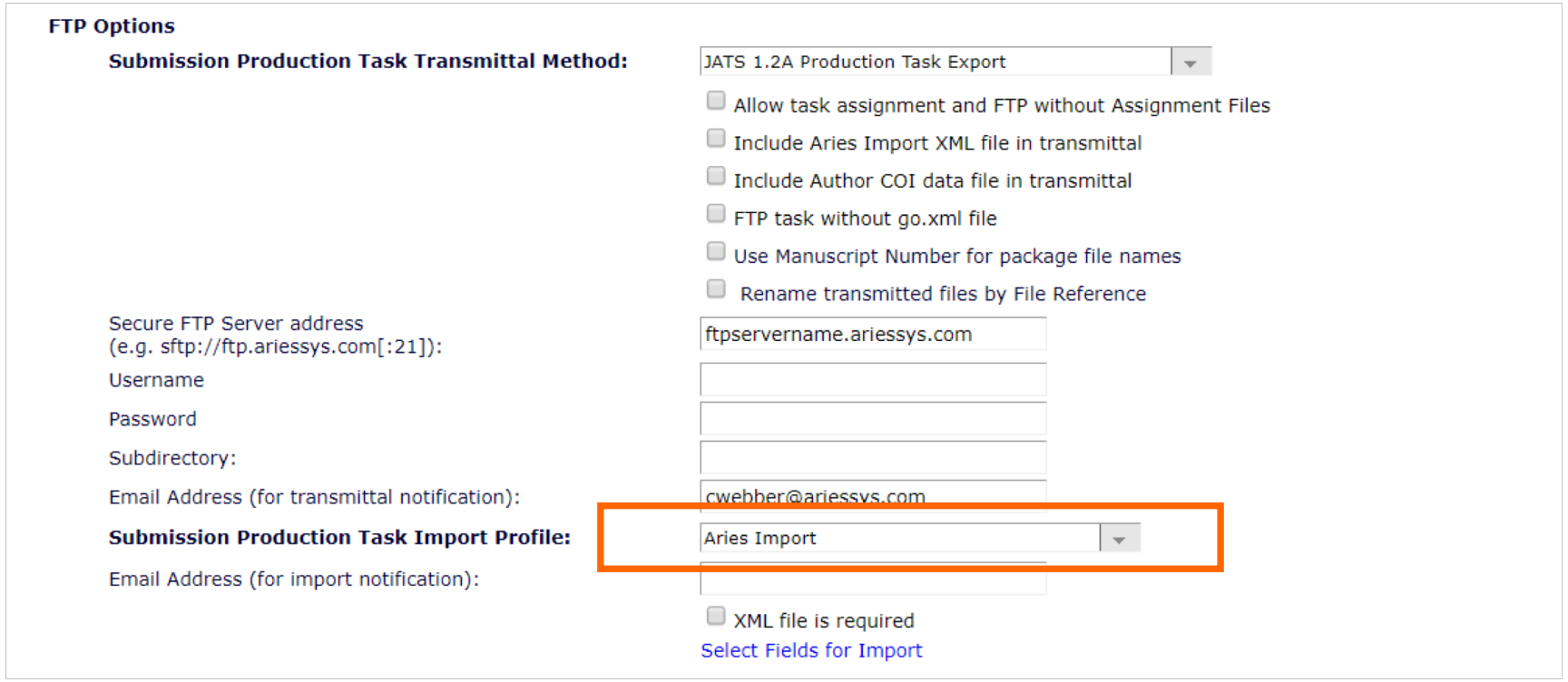
Import of files & metadata using a Task

Files and metadata can be SFTP'ed *into* EM/PM from a vendor using Task Import. The submission must already exist in EM/PM, and the Task must be open (i.e. previously assigned and not yet closed).



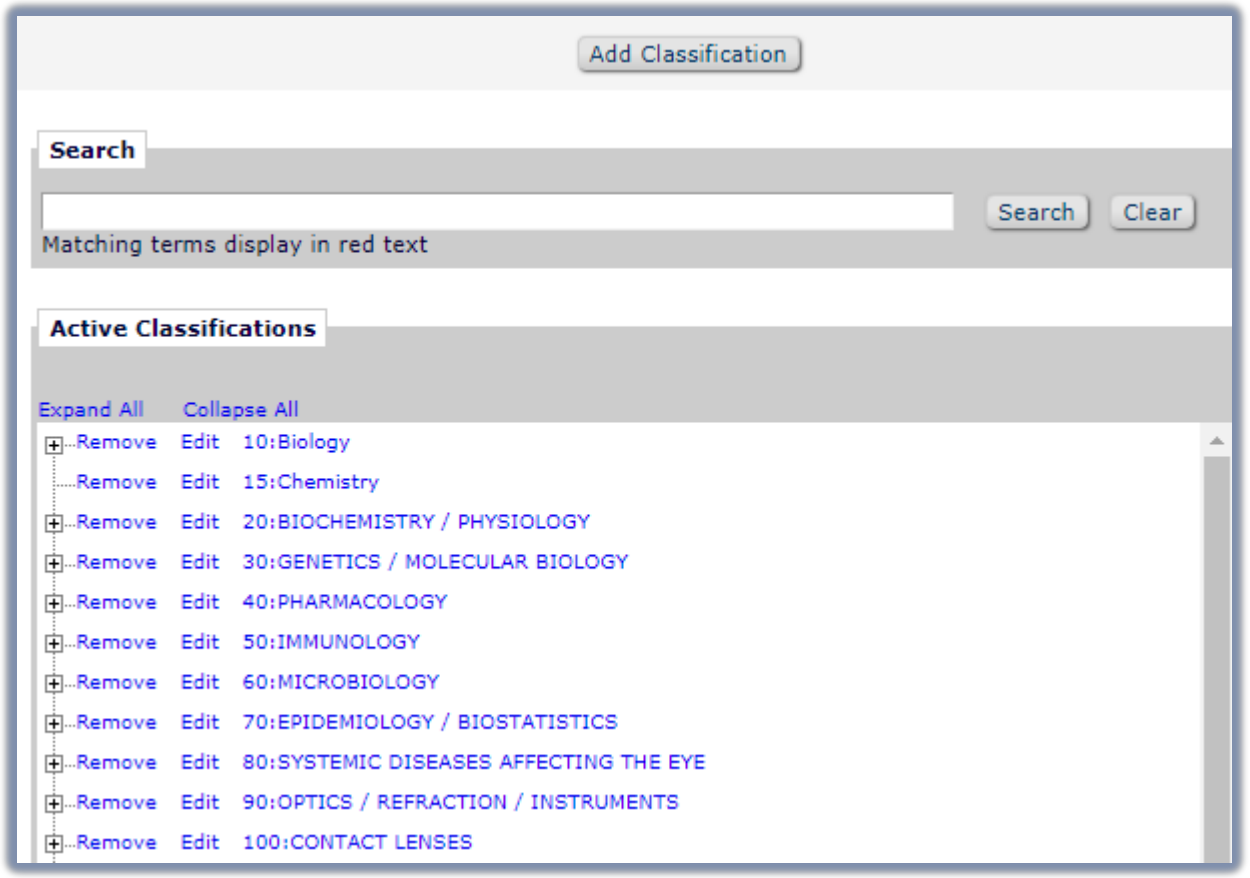
Import of files & metadata using a Task

A variety of metadata can be overwritten during task import (configured per task).

- General Manuscript Information:
  - ☐ Article Title
  - ☐ Short Title
  - ☐ Early Proof URL
  - ☐ Abstract
  - ☐ Target Online Publication Date
  - ☐ Actual Online Publication Date
  - ☐ Publication Date
  - ☐ Print Pages of Article
  - ☐ Page Range
  - ☐ Publication Start Page
  - ☐ Publication End Page
  - ☐ Publication Volume Number
  - ☐ Publication Issue Number
  - ☐ Table of Contents Position
  - ☐ Black and White Image Count
  - ☐ Color Image Count
  - ☐ Date Production Was Completed
- Additional Manuscript Details
  - ☐ A new field hidden on Manuscript Details
  - ☐ New test field not editable on Additional Manuscript Details
  - ☐ Embargo Time
  - ☐ AMD - Additional Notes

Taxonomy API/Classification Update

- EM sites can be configured with a list of classifications to apply to users and submissions.
- Some customers use an external taxonomy system to automatically classify submissions.
- EM allows these classification updates to take place using an API.



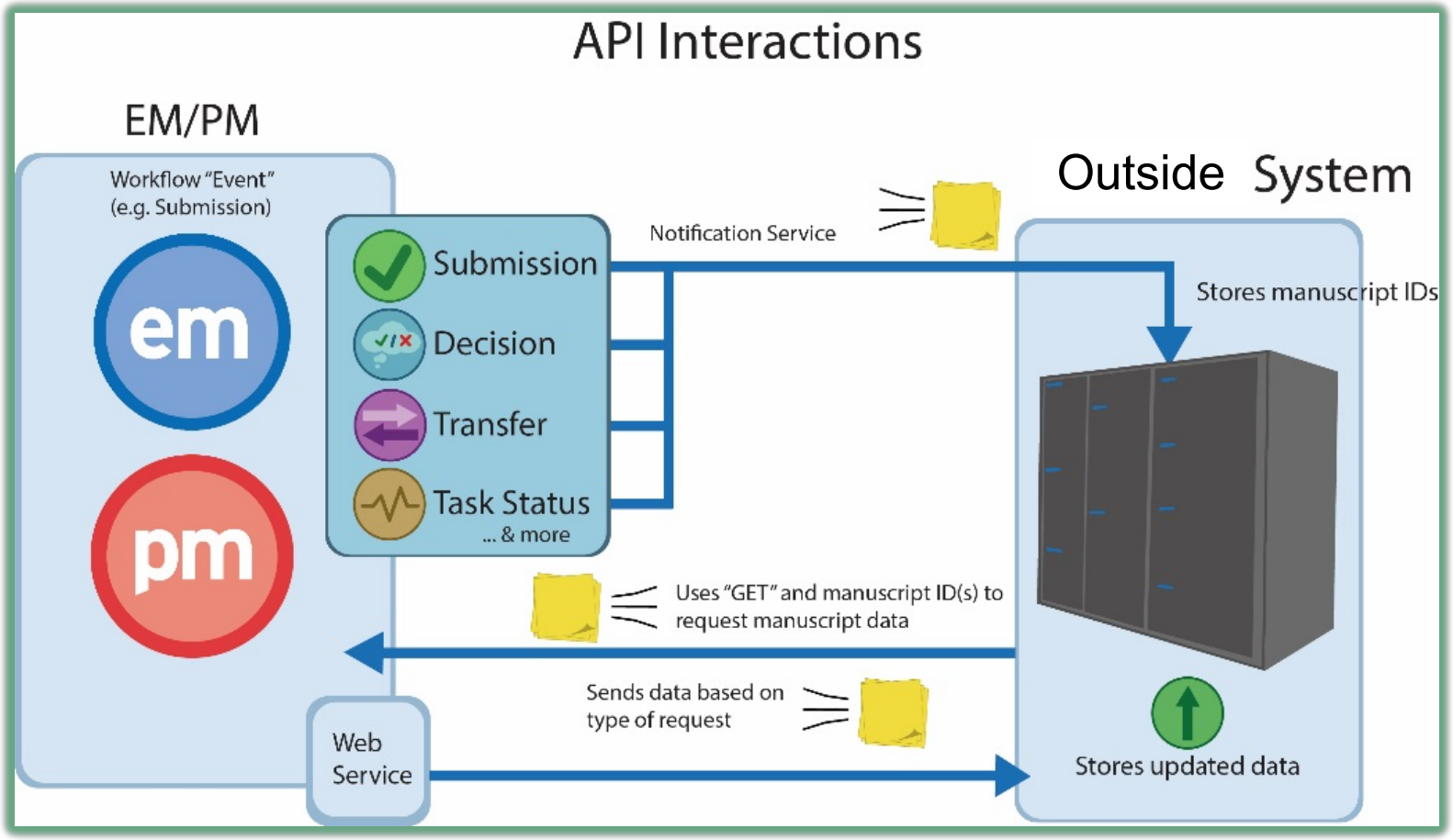
Taxonomy API workflow

- External taxonomy systems can make an API call to an EM site to retrieve classification info for a user account or submission.
- A separate push from the taxonomy system can update classifications for a user or submission via the API.
- A peopleID or documentID must be passed in each request.
- Can be used with EM Notification Services (to obtain documentIDs and status changes).

General Purpose Transactional API and Web Services

- **Notification Services:** 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:** allow publishers to retrieve detailed submission data at any time
  - Publication has a Web Services account registered with Editorial Manager
  - Publication sends the GET request in the specified format, and results are returned
  - Information delivered in either XML or JSON

EM Web Services



General Purpose Transactional API and Web Services - Additional Information and Configuration

- Activated by Aries Client Services
- Security Models built-in (https; Digest Access Authentication Method)
- AdminManager – Configure endpoints and events for Notification Services (pages: Configure Endpoints for Notification Services, Configure Notification Services)
- Editor RoleManager – Access Notification Services Monitoring Tool
- Documentation available from Aries Client Services

Guest Speaker

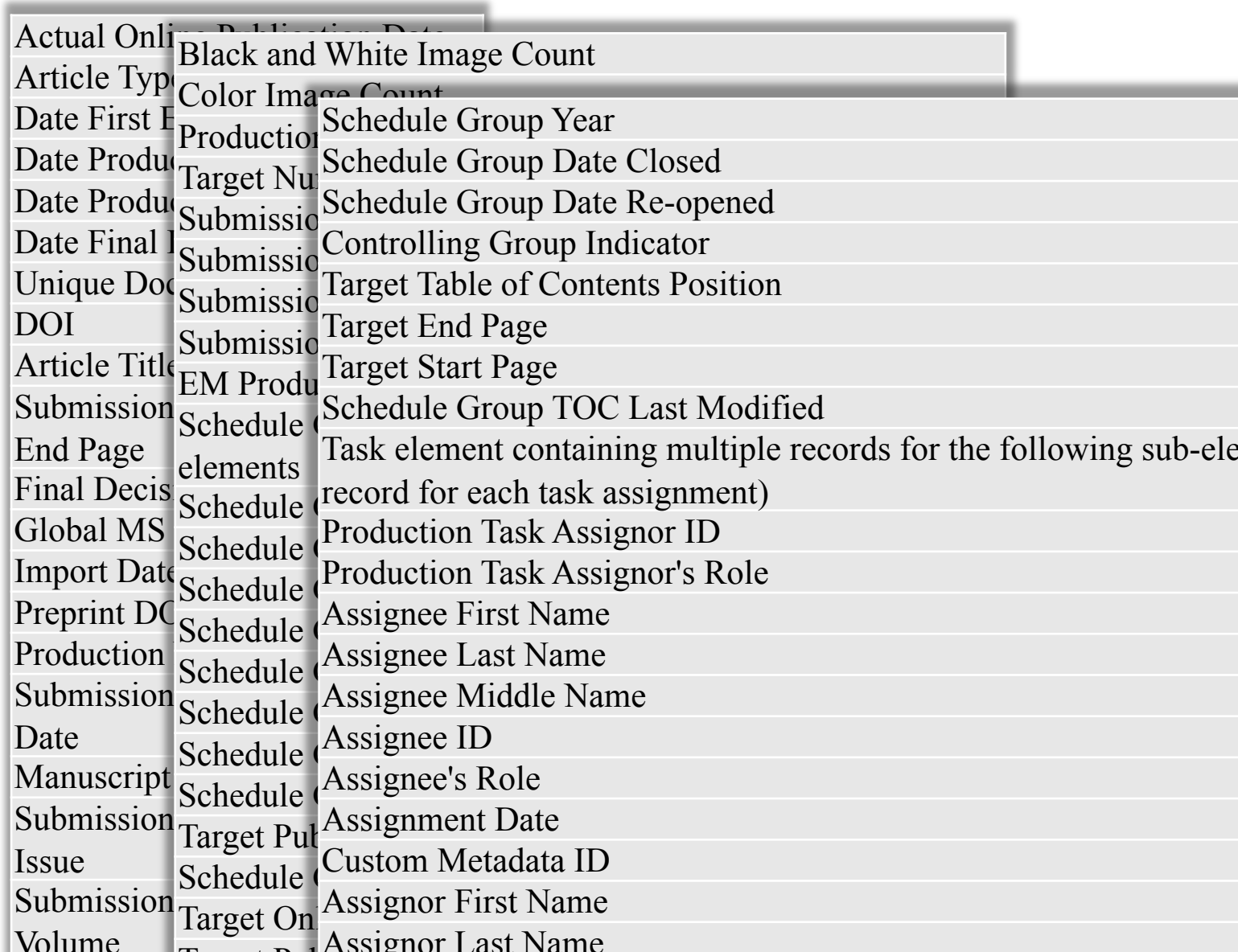
Nick Andrews, Managing Director
DataSalon

Upcoming API Integrations

EM Version 17.0 & beyond

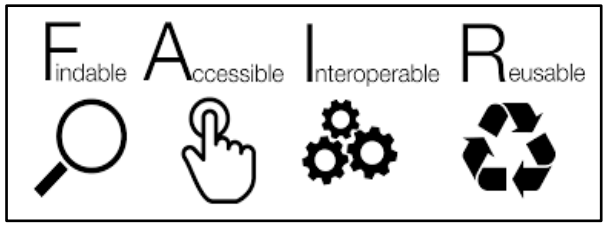
General Purpose Transactional API and Web Services Expansion to Production-related information – 17.0

- Expanding the API to return production-specific information.
- Uses same credentials and authentication mechanism as existing EM Web Services calls.



Repository Integration via API – EM Version 17.0

- **Repositories** and data trusts, both commercial and institutional, are used to store large data sets, image banks, video libraries and code snippets.
- FAIR data!



- API allows direct upload to repository by Author.

DRYAD

figshare

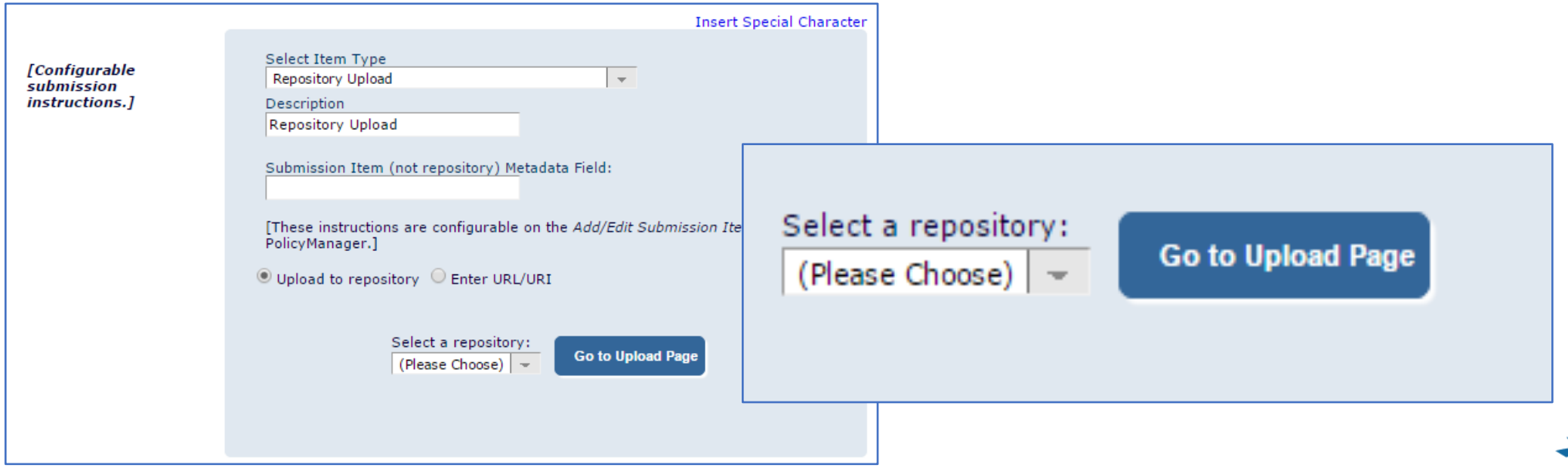
COS
CENTER FOR
OPEN SCIENCE

Cadmore Media

MENDELEY DATA

Repository Integration via API – EM Version 17.0

- Author selects a repository, then uploads the file and deposit information - file and information sent directly to the repository. Metadata about the deposit retained in EM; repository sends back an identifier.



Repository Integration via API – EM Version 17.0

- Display of a repository item in an EM System PDF – includes download link.

Manuscript Analysis Services Integration via Aries Generic API -17.0

Manuscript analysis tools use advanced machine intelligence and natural-language understanding to help assess quality by examining the structure, declarations, statistics, referencing, and other manuscript elements.

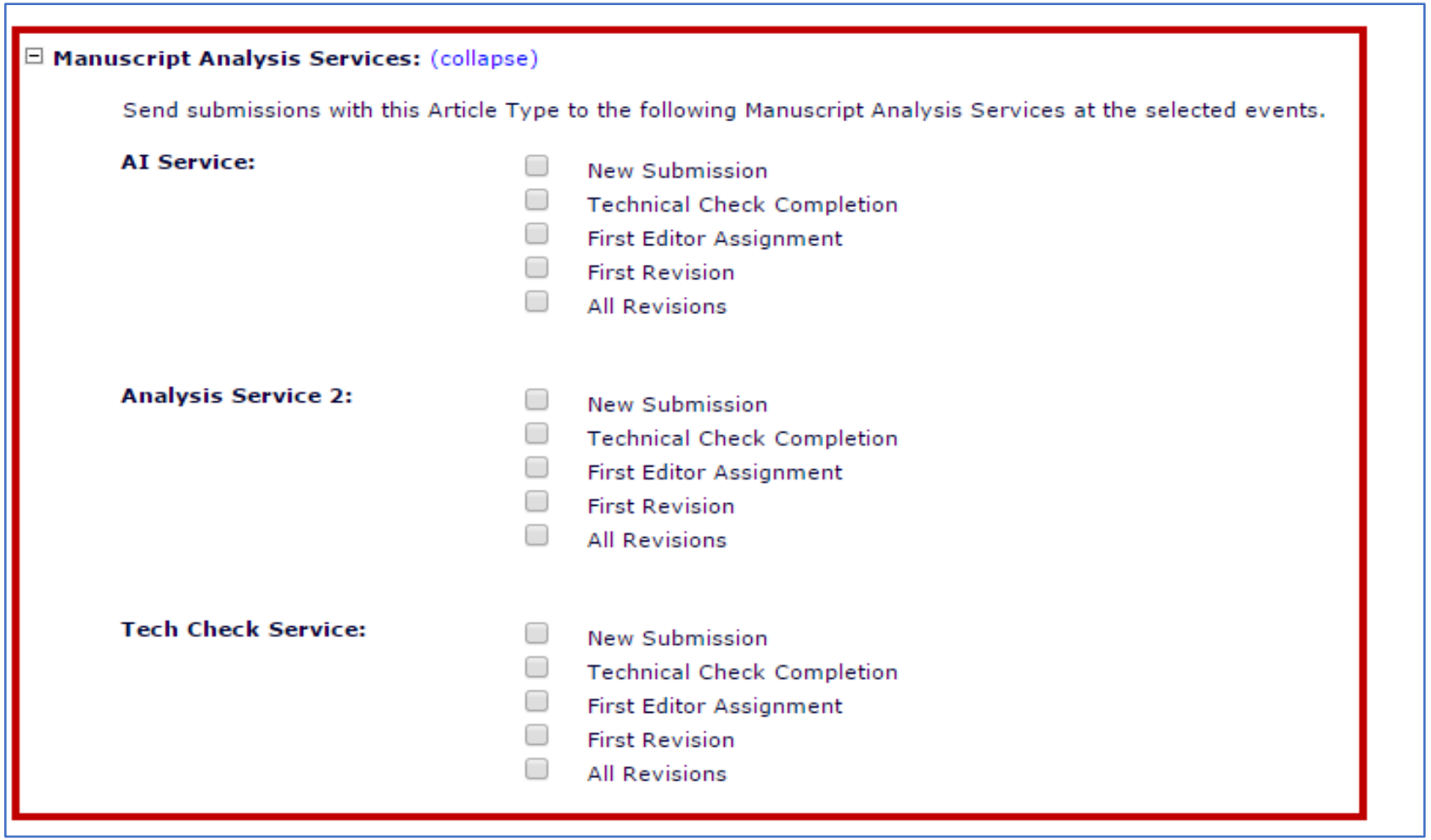
- SciScore – SciCrunch – research resource identifier
- Unsilo – Manuscript QA
- Penelope.ai – manuscript QA
- Ada – Editage – manuscript QA
- Ripeta – reproducibility assessment

AI Integration via Aries Generic API - 17.0

The package automatically sent from EM to an analysis tool (through the API) can include any combination of the following:

- The EM PDF of a submission.
- Individual submission items that are configured to be sent to the Analysis Tool.
- A set of submission metadata, including any custom submission questions configured on the site.

Manuscript Analysis Services Integration via Aries Generic API -17.0 – Automated trigger points by Article Type and AI Tool



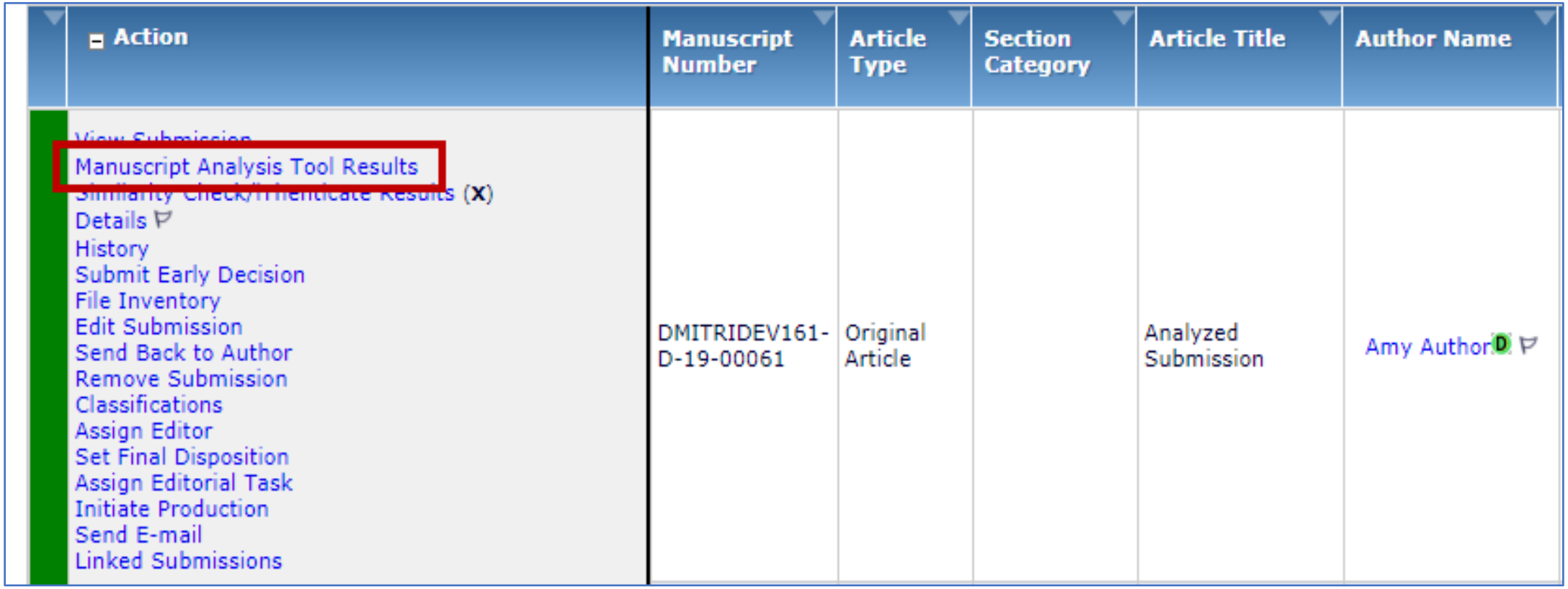
AI Integration via Aries Generic API - 17.0

Integrated analysis tools will be able to return results to EM (through the API) in any of the following formats:

- One or more files that will be stored in EM.
- A link to a report page within the Analysis Tool, which will be displayed in the EM interface.
- A set of scores that will be mapped to the EM UI.

AI Integration via Aries Generic API - 17.0

Access to the results via an "Action" link in various EM folders and EM Details



Manuscript Analysis Services Results page

Manuscript Analysis Services

Analysis Service	Date	Revision	Triggered By	Status	Actions	Scores
AI Service				Not Started	Send for Analysis	
Data checking service	June 4, 2019	1	Amy Associate [Associate Editor]	Processing	Cancel	
Manuscript QA service	June 2, 2019	0	Emily Editor [Associate Editor]	Complete	Send for Analysis Download Report Files	(55)
New manuscript analysis provider	June 3, 2019	1	New Submission	Error	Retry	
Z_Another service	June 1, 2019	0	Technical Check Completion	Complete	Send for Analysis Go to Report	
Z_Service with every possible report	June 4, 2019	1	Editor Assignment	Complete	Download Report Files Go to Report	[These scores were sent by the Analysis Service]

Convey Conflict of Interest Integration – 17.0

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

Convey Conflict of Interest Integration – 17.0

Integration with EM via the Convey API:

- Author list sent to Convey from EM (automatically at trigger points)
- Convey sends email to Authors, Authors submit disclosures within the Convey system
- A widget embedded in EM calls out to Convey to display the disclosure list and any supplemental files the Authors have uploaded.
- Two disclosure-related files can be pulled back into EM:
  - An XML file of the disclosures
  - A PDF report of the disclosures
- These files can be subsequently SFTP'ed out of EM to a downstream process.

Q&A