Research Exchange Screening Research Exchange Review

Release Notes

Last Updated February 26, 2026

Contents

Feb-2026: Editorial Conversation Tool, Phase 2.2.1 - Display of conversation participants, some tagging capabilities

Available from	19-February-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editorial Assistants (EAs), Journal Managers (JMs) (excludes Admin)
Overview	Assigned editors or editorial board members with observing or full editor access, as well as Editorial Assistants and Journal Managers, can now tag with an @mention each other in a comment on a manuscript and can see who has access to the manuscript.

Key Features

Conversation Tool Enhancements

- Editors can see who has access to the comments, for added transparency

    o They can view who has a role on the manuscript, or can view the manuscript

Editors can tag other users in comments

- Using the @ symbol to tag specific members of the editorial board

- Who can be tagged following release 2.2.1?

    o Other editors with a role assigned on the manuscript

    o Editors on the journal board with Full Access Editor permissions (either actioning taking or observational FAEs)

    o EA

    o JM

- Editors on the journal board who are not assigned on the manuscript and do not have Full Access Editor permissions **cannot** be tagged in this release, see 'Not in this Release' section below

Tagged users will:

- Be notified via email when they have been tagged

    o See a red cot counter on manuscripts with un-read comments

- New messages will appear with blue shading to signify the new comments from the older comments

- If a new comment is made while using the application, a toast message will appear

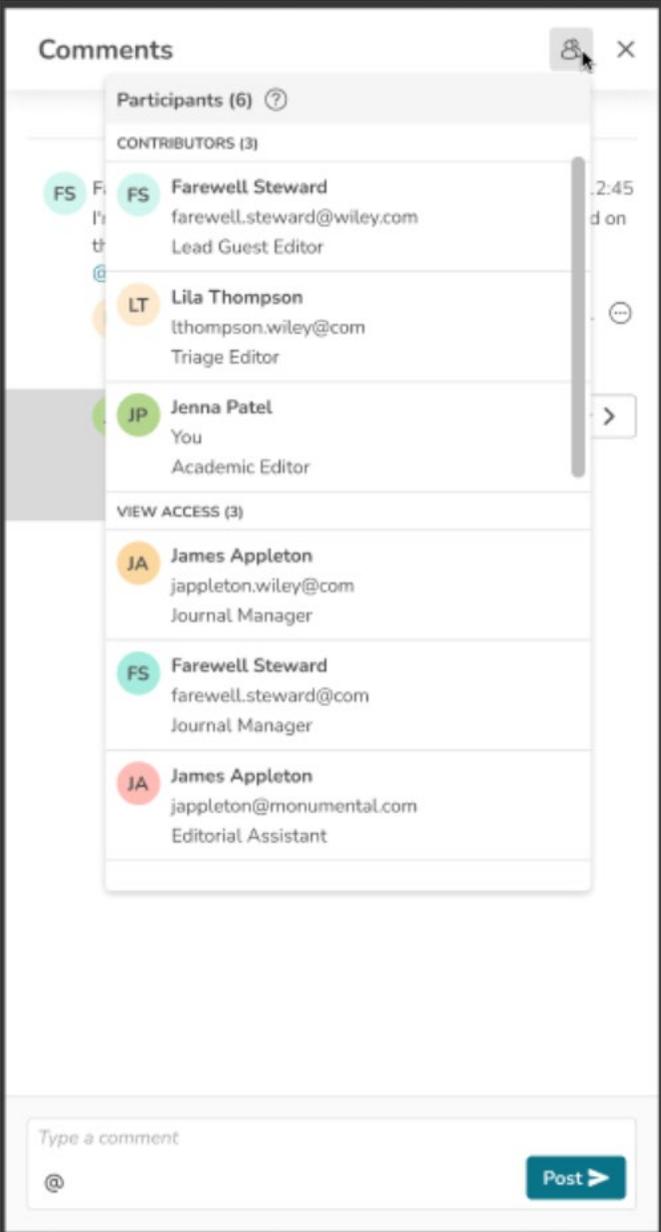All users who have access to the manuscript can now:

- View a list of users who have access to the manuscript and its comments.

- The list includes assigned and FAE editors, JM, and EA.

- Viewer roles (primarily our Editorial Systems Operations team) will be included but should not be engaged in Conversations.

- This list will NOT include potential responders not assigned to the manuscript (i.e., other Editorial Board members) who cannot be invited to a conversation with this release.

User Interface Updates

Comments Panel: Updated to show participants with access.

Once a participant with view access has started adding comments to the conversation they are moved to the contributor list

- Members are shown in alphabetical order

- Instead of the email address of the user who is logged in, they are shown the label "You"

Comments

Participants (6) ⓘ

CONTRIBUTORS (3)

FS	**Farewell Steward**
	farewell.steward@wiley.com
	Lead Guest Editor

LT	**Lila Thompson**
	lthompson.wiley@com
	Triage Editor

JP	**Jenna Patel**
	You
	Academic Editor

VIEW ACCESS (3)

JA	**James Appleton**
	jappleton.wiley@com
	Journal Manager

FS	**Farewell Steward**
	farewell.steward@com
	Journal Manager

JA	**James Appleton**
	jappleton@monumental.com
	Editorial Assistant

Type a comment

@

Post ➤

Tagging UI: Responsive dropdown for tagging editorial board members.

Comments

VERSION 1 ∧

FS **Farewell Steward** [TRIAGE] Jun 16, 12:45

I'm ready to make a final decision on this manuscript. Based on the reviews and our discussions, I'm inclined to accept it. @Janet Jackson, do you concur?

LT **Lila Thompson** Jun 27, 12:31

Reviewers mentioned that the issues were fixed in version 2.

JP [Add a reply here.   Reply >]

Type or select someone to mention

ⓘ Mentioning someone who isn't already a participant will give them rights to add comments and view manuscript details.

CONTRIBUTORS (5)

Alice Johnson
alice.johnson@email.com
Editor

Bob Smith
bob.smith@email.com
Editor

Charlie Brown
charlie.brown@email.com
Editor

VIEW ACCESS (3)

Dana White
dana.white@email.com
Editor

cript? I want to

know @|

@   [Post >]

Dashboard: New section for "Manuscripts Requiring My Input."

Notifications:

Journal Role	Manuscript Role	New Comment	Reply on user's comment	Reply on another user's comment
Editor	Assigned	Email | Toast | Bubble	Email | Toast | Bubble	Bubble
Editor	Tagged	Bubble	Email | Bubble	Bubble
Editor	Observing permissions	Bubble	Bubble	Bubble
EA/JM /Admin	None	Bubble	Bubble	Bubble

Feb-2026: Unified Dashboard for all Review Users

Available from	18-February-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editorial Assistants (EAs), Journal Managers (JMs) (excludes Admin)
Overview	We are introducing a **Unified Dashboard** for all Review users, consolidating the existing dashboards into a single, streamlined interface. This update simplifies navigation, improves consistency in design, allows multiple roles to enjoy the same feature and reduces technical debt by removing legacy dashboards.

Key Features

- Single Dashboard for All Roles

- All Review users (except Admins) now share a unified dashboard experience.

Expanded Scope Filter

- The Focus filter now includes all relevant user roles: Journal-wide (for Editors with full access editor [FAE] capabilities and Journal Managers), Editor (for all Editors), Editorial Assistant, Reviewer, and Legacy Authors

- The Focus filter will be shown to users with multiple roles (for example, a user with regular Editor and FAE rights will see both "Editor" and "Journal-wide")

- Users with single-role capabilities will not see this Focus filter, as they will only have one viewing experience.

Advanced Search Capabilities

Users with Journal-wide or Editorial Assistant access can also search by:

- Author email

- Editor name or email

- Role-Specific Filters
  EA/JM-specific filters (e.g., searching by Editor or Author) are integrated into the unified dashboard.

Ability "Reset filter" individually or to reset all.

User Interface Updates

- Filters are now nested in the following order:

  o Journal

  o Focus

  o Author Search – by email address only

  o Editor Search – by name or email address

  o Status

  o Article Type

  o Other Properties

- Consistent design language applied across all Review roles for a cleaner, more intuitive experience.
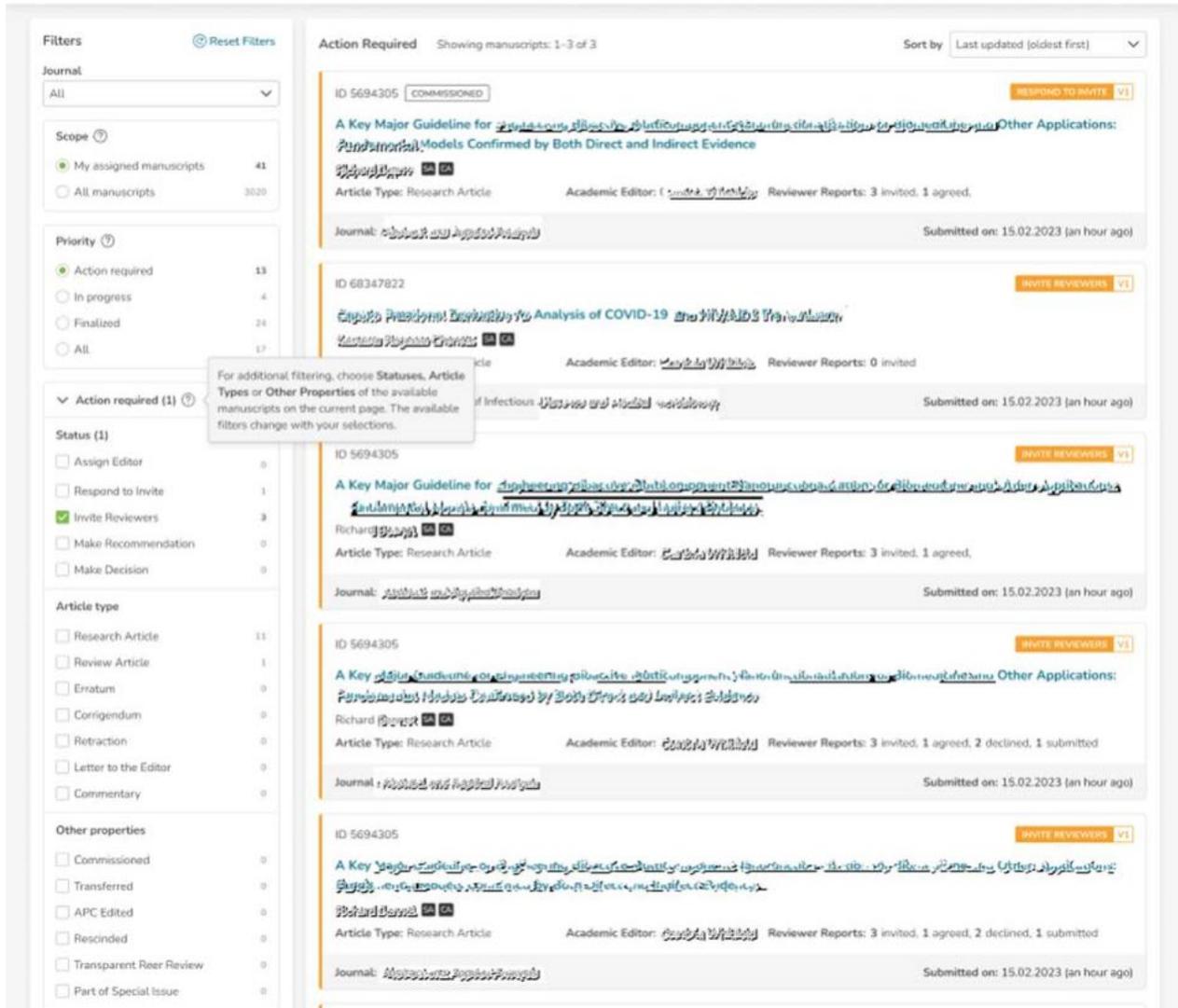
Feb-2026: User Interface Update | Special Issue Filter

Available from	18-February-2026
Impacted Module	Research Exchange **Review**

Special Issue is now its own filter category on the Unified Dashboard (live with Editor view now, other roles to following during rollout of unified dashboard in coming weeks [end-Feb 2026].

- 'Special Issue' option is no longer included in the *Other Properties* filter options

- The Special Issue filter can't be used on the *Journal > all* selection

- Specific journal must be chosen, and that specific journal must have open Special Issues for the filter to work.

The Special Issue search filter is currently active on the editor dashboard and is available to editors with both observing and full access capability. This will also be added to Unified Dashboard and visible to all Research Exchange users (except for Authors).

- **Current behavior:** Full Access Editors who are assigned to only a single journal cannot view Special Issue titles on the 'All' Journal selection; they must navigate to the Journal first, to use the Special Issue filter.

- **Planned improvement:** Users with access to multiple journals will continue to see the **"All"** option, while users with access to only one journal will automatically default to that journal.
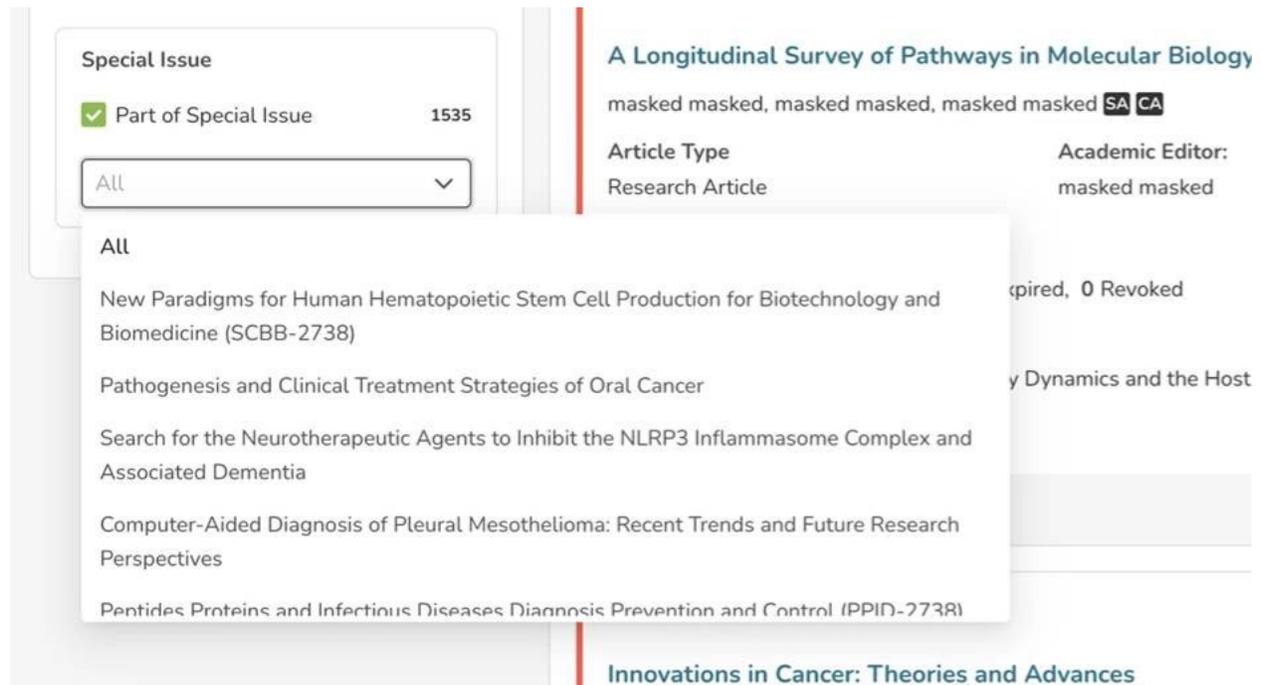
Feb-2026: Configurable Workload Capacity for Screening Teams

Available from	17-February-2026
Impacted Module	Research Exchange **Screening**
Impacted Roles	Lead Screeners, Lead Specialists, Admins

Overview	This release introduces a capacity management system that enables Lead Screeners, Lead Specialists, and Admins to set individual workload capacity values ("Workload Share") for team members, allowing the manuscript assignment algorithm to distribute work proportionally based on actual availability and capacity rather than assuming equal distribution.
	Team leads can view capacity information in the User Management table, adjust individual capacity values using simple increment/decrement controls (range 0-99, default 5), and see visual indicators when users are unavailable (capacity = 0).
	The assignment algorithm considers each user's capacity relative to their current workload, assigning manuscripts to users with lower workload-to-capacity ratios before those who are more heavily loaded. When all users are at or over capacity, assignments are distributed proportionally based on capacity levels.
	Changes to capacity take effect immediately for the next manuscript assignment. Users with capacity set to 0 never receive new assignments, though their existing assigned manuscripts remain with them until manually reassigned.
	Role-based access ensures Lead Screeners can only edit Checker capacity; Lead Specialists can only edit Specialist capacity, and Admins have full access to all capacity settings.

Key Features

Workload Share

- Capacity Editing Controls

- Simple +/- buttons for increment/decrement (1 unit per click)

- Valid range: 0 (unavailable) to 99 (maximum capacity)

Workload-Aware Assignment

- Assignment algorithm calculates workload-to-capacity ratio for each eligible user (see Workload Share Examples for more information)

- Manuscripts assigned to users with lowest stress ratio (current workload / capacity)

- Proportional distribution when all users at/over capacity

- Capacity 0 users excluded from automatic assignment

- Existing manuscripts NOT automatically reassigned when capacity changes to 0

- Changes effective immediately on next assignment event

Access Control

- Lead Screeners: View Users tab, edit Checker capacity only

- Lead Specialists: View Users tab, edit Specialist capacity only

- Admins: View Users tab, edit all Screener and Specialist capacity

- Checkers/Specialists: No access to Users tab or capacity editing

UI Updates

Workload Share

- New "Workload share" column appears after "Teams & Roles" in the Users table

- Workload share values remain visible when navigating between pages, searching, or filtering users

- Screeners and Specialists show their workload share as a number (new users show 5 by default)

- Users who are not Screeners or Specialists show "N/A" or "Not applicable" in grey text

- Immediate save confirmation with error handling for invalid values

- Failed saves revert to previous value to maintain clarity on active settings

- Question mark icon with tooltip explaining workload share

Workload Share Column

Edit Workload Share

Users not applicable for Workload Share

Full name	Email address	Role & team	Workload share ⑦
Stephan the Great	email.address@wiley.com	Image Screening Team [LS]	N/A
Marcus Rodriguez	email.address@wiley.com	Team Thunderbolts [SC]	5
Amelia Turner	email.address@wiley.com	Team Thunderbolts [SC]	0 • On hold ✎
Olivia Foster	email.address@wiley.com	Team Thunderbolts [SC]	5
Ethan Hayes	email.address@wiley.com	Team Thunderbolts [SC]	5
Benjamin Patel	email.address@wiley.com	Team Thunderbolts [SC]	5
Jackson Nguyen	email.address@wiley.com	Team Thunderbolts [SC]	5
Sophia Reynolds	email.address@wiley.com	Image Screening Team [LS]	N/A
Liam Campbell	email.address@wiley.com	Team Thunderbolts [QC]	5
Nathan Wright	email.address@wiley.com	Image Screening Team [LS]	N/A
Mason Thompson	email.address@wiley.com	Team Thunderbolts [QC]	5
Landon Baker	email.address@wiley.com	Team Image Screening Team [LS] [QC]	N/A
Ava Mitchell	email.address@wiley.com	Team Thunderbolts [QC]	0 • On hold
Sophia Maccmanan	email.address@wiley.com	Team Thunderbolts [QC]	5
Steven King	email.address@wiley.com	Team Thunderbolts [QC]	0 • On hold

Error state

Marcus Rodriguez	email.address@wiley.com	Team Thunderbolts [SC]	5	⚠ Failed to save. Try again!
Amelia Turner	email.address@wiley.com	Team Thunderbolts [SC]	12 ⊘ ⊗	

Hover over Workload Share tooltip

Workload share ⑦

Workload share determines how manuscripts are distributed across a team. How assignment works:

How assignment works:

- Manuscripts are distributed proportionally based on each user's workload share relative to the team's total.
- Example: In a team where User A has share 10 and User B has share 5, User A receives twice as many manuscripts as User B (e.g., 20 vs 10 out of 30 total manuscripts).
- Workload share only determines proportion, not a maximum, users may receive more manuscripts than their share value.
- Default share = 5 for new users.
- Share 0 = on hold (no new assignments, but manuscripts already assigned to them, returned to author or returned to peer review will be reassigned back to the original user).
- N/A = role doesn't receive manuscript assignments

Workload Share Examples

Example team:

- Screener A: capacity = 2 (part-time, can handle 2 manuscripts comfortably)
- Screener B: capacity = 8 (full-time, experienced)
- Screener C: capacity = 10 (full-time, very experienced)

First 10 manuscripts:

1. Goes to C (0/10 = 0%)
2. Goes to B (0/8 = 0%)
3. Goes to A (0/2 = 0%)
4. Goes to C (1/10 = 10% - lowest)
5. Goes to B (1/8 = 12.5% - lowest)

6. Goes to C (2/10 = 20%)

7. Goes to B (2/8 = 25%)

8. Goes to C (3/10 = 30%)

9. Goes to B (3/8 = 37.5%)

10. Goes to C (4/10 = 40%)

After everyone hits 100% capacity, manuscripts continue at those proportions
  Special case - Capacity = 0: If you set someone to 0 (on leave, sick, unavailable), they get zero new manuscripts. But their existing work stays with them unless someone manually reassigns it

Feb-2026: Allow Editors to Change Issue Type at Acceptance

Available from	5-February-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors
Overview	This release introduces a complete workflow that enables decision-making editors to change the publication issue of an article at the point of acceptance, communicates the change to authors, and delivers the change information to production in a structured manner that supports automatic, secure processing through to successful publication in the desired issue. This is an alternative solution to the current inability of authors to change the issue type at revision. Editors can select between Regular Issue and Special Issue, choose a new open special issue published by the journal when relevant, and have any change safeguarded by a confirmation modal that flags whether a change has been made compared with the original issue selected and saved at submission. The editor accepting the paper for publication in a different issue must obtain the agreement of the editors responsible for the new host issue before submitting the decision with the change. The new publication issue, along with the reason for the change, is communicated to authors via the Acceptance Decision Letter.

The system preserves issue change selections and text input until the decision letter is delivered (information is not lost at refresh or logout), manages edge-case scenarios (e.g., flagging the absence of active special issues), and transmits finalized changes to production systems via output metadata files containing structured data that can be automatically processed.

Key Features

1. Ability for Editors to Change Publication Issue at Acceptance

- Editors can opt to change the manuscript's publication issue when selecting the *Accept* decision.

- Rejection/revision decisions do not enable issue type changes.

- "Issue Type" options (Regular Issue / Special Issue) are displayed via radio buttons.

Supports switching between:

- Regular Issue → Special Issue

- Special Issue → Regular Issue

- Special Issue A → Special Issue B

- Conditional "New Issue Name" dropdown appears only when Special Issue is selected.
  Dropdown includes:

  o All *open* Special Issues (not *closed,* not *cancelled*)

2. Mandatory "Reason For Issue Change" text box

3. Intelligent Pre-selection & State Handling

- When the checkbox "Change the publication issue for this manuscript" is first selected, radio buttons are displayed in a preselected state reflecting the manuscript's current issue type.

- If no active Special Issue exists:

  o Special Issue option is greyed out and disabled (explanatory text)

- Behavior remains consistent after Return to Peer Review from Quality Checks:

  o *Accept* decision option re-displays previously saved values, allowing modification.

- *Reject & Revision* decisions discard any changes made to the publication issue.

4. Data Persistence

- System autosaves:

- Issue Type selection

- New Special Issue Name

- Reason for issue change

- Persisted across navigation or incomplete workflows.

- Reason text is preserved even when switching between options.

5. Mandatory confirmation checkbox that the editors responsible for the new host issue agreed to the changes

6. Confirmation Modal Before Email Preview

- Appears when:

- "Change publication issue" is checked, AND

- Editor clicks "Preview Decision Email"

- Two modal variants:

- A. No actual change detected (but reason entered): Warns editor that no issue change has been made and reason will be discarded if they submit the decision.

- B. Issue change detected: Informs editor that changes were made and provides the opportunity to verify accuracy and confirm before proceeding to submit the decision.

7. Updated Acceptance Decision Letter Emails

- Whenever the issue type is changed by the editor at acceptance, the Decision Letter will include that information to inform and confirm the change with the authors.

- publication issue is not changed → no extra information is added to the default content of the decision letter

- Special → Regular:

"Your paper will be published in a Regular Issue of the journal.
The reason for changing the issue is as follows:
<<editor-entered reason>>"

- Regular → Special, OR

- Special Issue A → Special Issue B

"Your paper will be published in the special issue <<special issue name>>.
The reason for changing the issue is as follows:
<<editor-entered reason>>"

- This text is editable in the preview and may be amended to refine the message delivered to authors.

8. Data Transfer to Production Systems

- After the decision to accept the manuscript for publication has been submitted, changes are sent downstream to production only once the **Material Checks** stage has been completed and all required manuscript files have been provided by the authors in accordance with production requirements.

- The service that handles the export to production has been updated to:

- Save the new publication issue details + Reason for issue change

- Deliver the change information to production in a structured manner that supports automatic processing

UI Updates

- *New checkbox: "Change the publication issue for this manuscript".*

- *Radio buttons for "Issue Type" selection with conditional "Special Issue Name" dropdown.*

Disabled/greyed-out SI option when no active SIs exist.

Mandatory Reason text area with autosave behavior.

☑ Change the publication issue for this manuscript

⚠ Please communicate your decision to the editor responsible for the new issue.

Issue Type *

◉ Special Issue

◯ Regular Issue

New Issue Name *

| Special Issue 1 Test 2026 | ⌄ |

Reason For Issue Change *

The paper is highly in scope for the special issue and will deliver value to this collection and to the collective efforts of researchers working in this niche domain.

- *Mandatory confirmation checkbox (warning message displayed in red if Editor clicks "Preview Decision Email" without confirmation).*

☑ I confirm that I have spoken to the editor responsible for the new issue before accepting this manuscript *

Preview Decision Email

☐ I confirm that I have spoken to the editor responsible for the new issue before accepting this manuscript *

You must confirm that you have spoken to the new issue editor-in-chief before accepting this manuscript

Preview Decision Email

Confirmation modal shown prior to previewing the decision email.

- ○ *No issue change detected (but reason entered)*
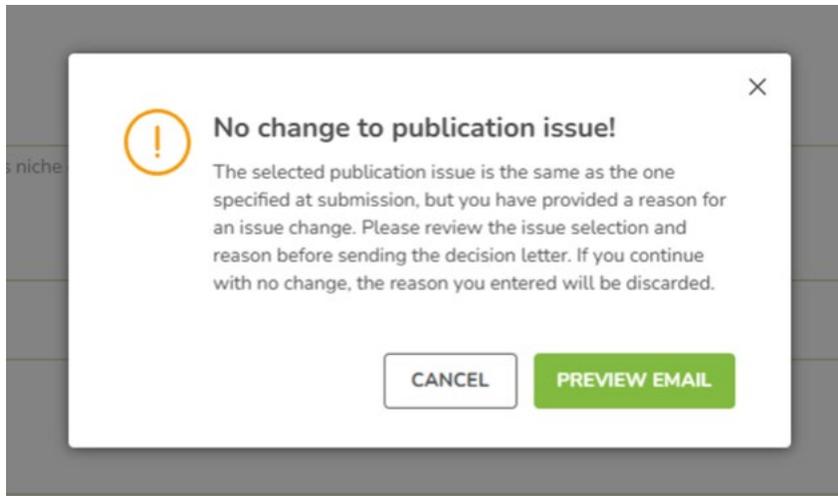
- *Issue change detected (but reason entered)*
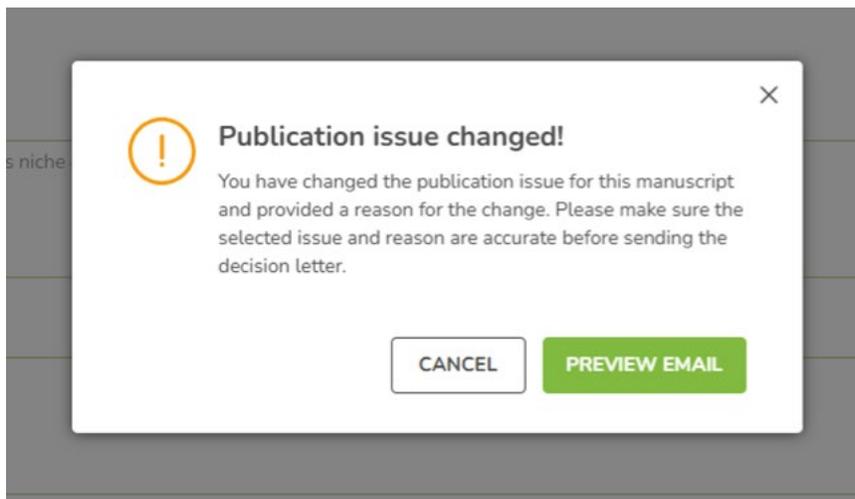
- *Acceptance Decision Letter email now displays structured, styled reason text when applicable.*
  - *New publication issue is a special issue*

Dear Dr. Jane Doe,

We are delighted to inform you that your manuscript "Test article title" has been accepted for publication in Test Journal A.

Your paper will be published in the special issue Test Special Issue 1 2026. The reason for changing the issue is as follows:

> **"**
>
> The paper is highly in scope for the special issue and will deliver value to this collection and to the collective efforts of researchers working in this niche domain.

You can find reviewer comments at the bottom of this email, if applicable.

What happens now?

We will now check that all of your files are complete before passing them to our production team for processing. We will let you know soon if we require any further information.

- *New publication issue is a regular issue*

Dear Dr. Jane Doe,

We are delighted to inform you that your manuscript "Test article title" has been accepted for publication in Test Journal A.

Your paper will be published in a Regular Issue of the journal.
The reason for changing the issue is as follows:

> The Special Issue to which you submitted your manuscript has been cancelled.
>
> We are pleased to note, however, that your article has been very positively evaluated and is considered to be of high quality, bringing clear value to the research field. For this reason, we have decided to proceed with publishing your manuscript in a regular issue of the journal.

You can find reviewer comments at the bottom of this email, if applicable.

What happens now?

We will now check that all of your files are complete before passing them to our production team for processing. We will let you know soon if we require any further information.

- the feature that enables authors to change the issue type/ special issue when submitting a revision will be implemented.
- The changes made in Research Exchange Review and propagated downstream to the Production systems are not in sync with the Reporting system.

Jan-2026: Improvements to Editor Assignment Flexibility for Special Issues

Available from	27-January-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Special Issue Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers, Full Access Capability

Overview	This release introduces enhancements to the editor-assignment workflow leveraging the PKG-based algorithm. The improvements ensure that Special Issue (SI) editors are consistently represented in PKG service events, editor suggestions become more relevant and precise, and Editorial Board roles can be surfaced with greater flexibility. These changes collectively enhance accuracy, transparency, and usability for editorial staff assigning editors to manuscripts.

Key Features

1. Inclusion of SI Editors in PKG Events

SI editors are now included when events are sent to the PKG service. This ensures that PKG receives the complete editorial board context.

2. SI-Specific Editor Suggestions

When a manuscript belongs to a Special Issue, the editor suggestion panel now displays recommendations *only* from that SI's designated editor pool.
Benefits include:

- More relevant and contextually appropriate suggestions.
- Faster, more accurate editor assignment.

3. Editorial Board Assignment Flexibility

Users have the option to view **non-responsible roles** within the editor suggestions panel by toggling off "Show all editorial board members".

This provides:

- Increased flexibility when selecting editors beyond the primary responsible role.
- Better visibility into the full breadth of editorial expertise.

4. SI Editor Query by External ID

Systems can now query SI editors using an SI's **external ID**, improving:

- Reliability and consistency across integrated systems.
- Ability to support external or partner workflows referencing SI metadata.

UI Updates

- *A new toggle allows users to optionally show **non-responsible roles** within the editor suggestions panel by toggling off "Show all editorial board members".*
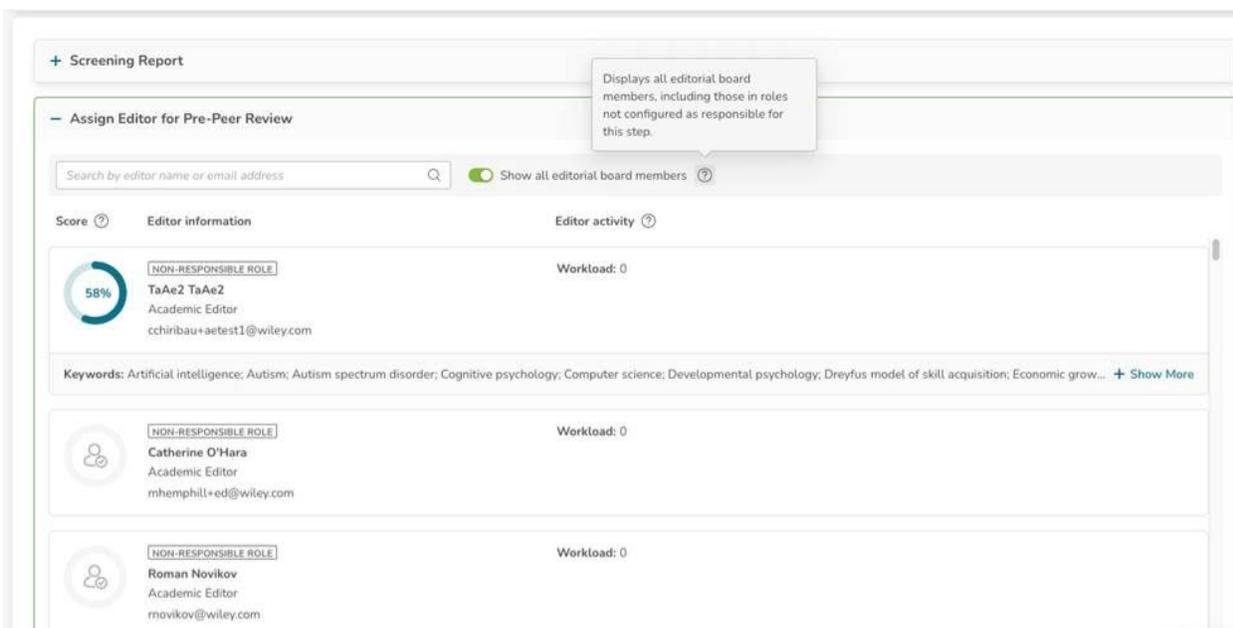
Dec-2025: Editors can record their availability in app

Available from	18-December-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors, Editorial Assistants, Journal Managers
Overview	Editors can now record their availability in the application to manage out-of-office periods and prevent automatic manuscript assignments during their absence. OOO dates are visible to colleagues—including other editors, Journal Managers, and Editorial Assistants—enabling informed assignment decisions across the team.

Key Features

- Set Out-of-Office Dates: Editors who are journal board members can schedule multiple OOO periods in the Account Settings page available under "My Profile"

- Visibility of Availability: OOO status is displayed to relevant roles (pre-peer-review editors, editors with Full Access, JMs, EAs, and admins) in the Review application.

- Assignment Logic Update: Review will not automatically assign manuscripts to editors marked as OOO unless they are the only suggested editor.

User Interface Updates

Profile Page: Editors can set and manage OOO dates from the "My Profile" section within Review
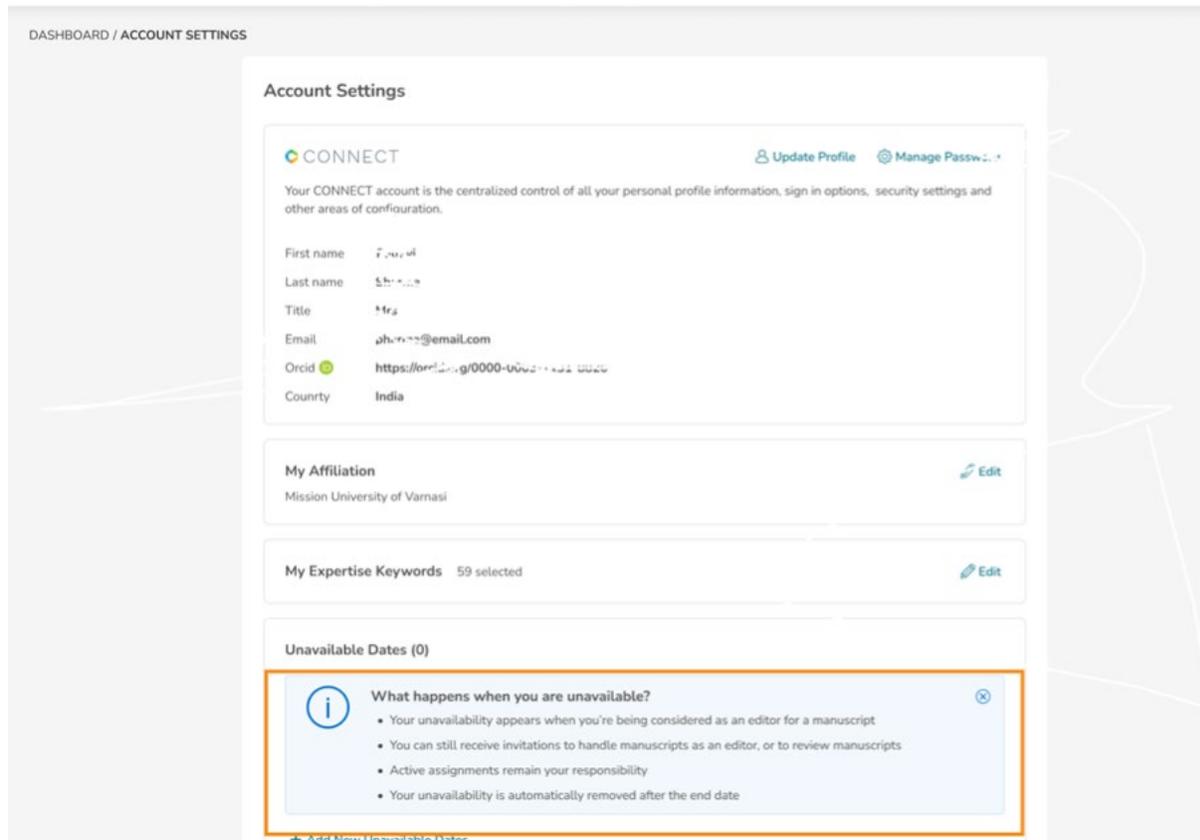
Modal is open by default. If it is closed, it can be re-opened by clicking "Add New Unavailable Dates"

Dates entered

Red dot indicates Editor is currently unavailable

No dates entered

Account Settings

C CONNECT

Update Profile   Manage Password

Your CONNECT account is the centralized control of all your personal profile information, sign in options, security settings and other areas of configuration.

First name   P...

Last name   S...

Title   Mrs

Email   pharm...@email.com

Orcid ⓞ   https://orcid.org/0000-0002-1121-...

Counrty   India

My Affiliation   ✐ Edit

Mission University of Varnasi

My Expertise Keywords   59 selected   ✐ Edit

Unavailable Dates (0)   ⓘ About Unavailable Dates

+ Add New Unavailable Dates

Notification Settings   >

Choose which emails you want to receive.

Can edit and/or delete previously entered unavailable dates

Unavailable Dates (2)   ⓘ About Unavailable Dates

+ Add New Unavailable Dates

Edit dates

Delete dates

> Jun 06, 2025 - Jun 13, 2025 (8 days) 🔴   ✐ 🗑

⌄ Dec 24, 2025 - Jan 03, 2026 (11 days)   ✐ 🗑

Comments

Annual conference in Boston

Assignment Screens

Availability indicator appears in Article details page

Unavailable dates details

When editor is close to unavailable period or is unavailable currently, system will display warning message
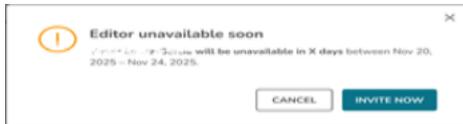
Dec-2025: Implement Role-Based Escalation Filters

Available from	8-December-2025
Impacted Module	Research Exchange **Screening**
Impacted Roles	Lead screeners, lead specialists, viewers and admin users
Overview	This release introduces a new **Manuscript Escalation Management** feature designed to give lead screeners, lead specialists, viewers and admin users dynamic visibility into workload distribution across teams and individuals. The goal is to enable informed decisions on work redistribution and identify performance patterns under different manuscript conditions.

Key Features

- Role-Based Access Control

Admin and Lead Screener users: Full visibility of the Manuscript Escalation section (except "Myself" option).

- Dropdown options: All, Specialists, Lead Screeners.

Lead Specialist users: Limited visibility.

- Dropdown options: Myself, Specialists.

Team and Individual Workload Visibility

- o Filter submissions by assignment teams and roles.

- o Real-time counts for teams and individual specialists.

- o Lead Specialists clearly marked with the 'LSP' abbreviation.

- o Counts dynamically update based on manuscript conditions.

Contextual Escalation Distribution

- o Filter escalation data by issue type, manuscript stage, assignment, and author response.

- OR-based status filtering for broader visibility.

- Dynamic count updates for intersections of multiple filters.

Filter Management

- Reset all escalation-related filters simultaneously or individually.

- Immediate visual feedback and real-time updates on filter changes.

User Interface Updates

- Added Manuscript Escalation section with:

- Checkbox: Escalated manuscripts.

- Dropdown: Escalated to (with counts)

- Behavior changes:

- Selecting "All" hides team and specialist dropdowns.

- Selecting "Specialists" shows team and specialist dropdowns.

- Selecting "Lead Screeners" shows only team dropdown.

- *Sort by section moved to top-right of dashboard*

- **Total manuscript counter** moved to top-left of dashboard.

Manuscript Escalation filter added

Issue type

All ⌄

Manuscript stage

Submission checks ⌄

☐ Author responded   84

Manuscript assignment

Assignment status

All ⌄

Checker team

All ⌄

Checker

All ⌄

Manuscript escalation

☐ Escalated manuscripts   36

Submission checks

Processing

☐ Automatic checks   133

Work in progress

☐ New manuscript stage   3524

Pending response

☐ Returned to draft   110
☐ Paused   17

"Escalated To" Views

Issue type

All ⌄

Manuscript stage

All ⌄

☐ Author responded   0

Manuscript escalation   Clear

☑ Escalated manuscripts   1

Escalated to

Myself ⌄

Issue type

All ⌄

Manuscript stage

All ⌄

☐ Author responded   0

Manuscript escalation	Clear

☑ Escalated manuscripts   2

Escalated to

Specialists ⌄

Escalation team

All ⌄

Specialist

All ⌄

Issue type

All ⌄

Manuscript stage

All ⌄

☐ Author responded   0

Manuscript escalation	Clear

☑ Escalated manuscripts   2

Escalated to

Specialists ⌄

Escalation team

All ⌄

All	2
[Sergiu] Specialist Test	2

Issue type

All ⌄

Manuscript stage

All ⌄

☐ Author responded   0

Manuscript escalation	Clear
☑ Escalated manuscripts	2

Escalated to

Specialists ⌄

Escalation team

[Sergiu] Specialist Test ⌄

Specialist

All ⌄

All	2
[SERGIU] SPECIALIST TEST	2
Sergiu Lead (LSP)	1
Sergiu Leogan	0
Sergiu Specialist lead now ...	1

Sort by *section moved to top-right of dashboard*
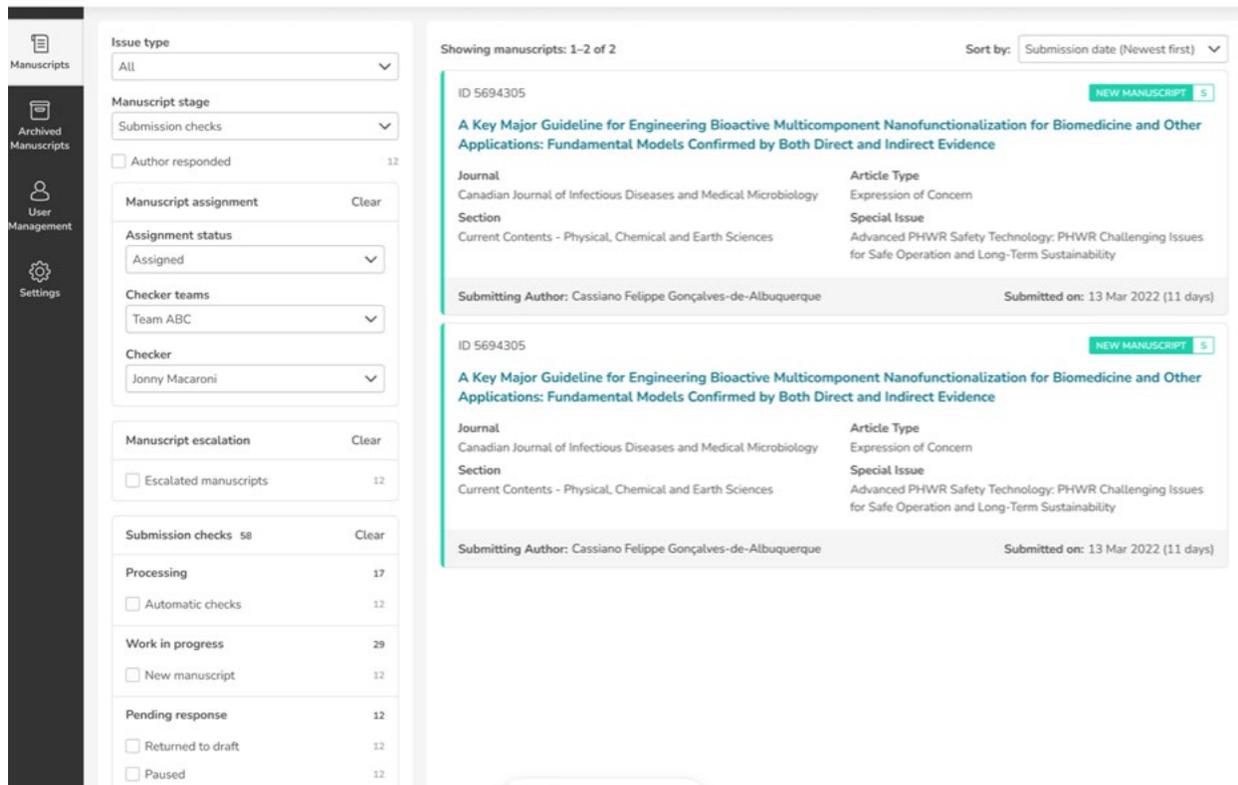
- *Removed duplicate manuscript counters from status section to reduce clutter.*

Dec-2025: Materials Check – Version History Enhancements

Available from	3-December-2025
Impacted Module	Research Exchange **Screening**
Impacted Roles	Screening Users
Overview	When a manuscript enters the Materials Check flow with a new minor version (e.g., after a *Request Files* action), previously selected radio button answers will be displayed in the UI. This update improves clarity and traceability of requests for materials and versioning during that process.

Key Features

- When navigating to an **earlier minor version** within the Materials Check flow:

  o **Previously selected radio button answers** will now be visible.

  o Any **associated free-text responses** will also be displayed.

- All displayed inputs on previous versions are **read-only**:

  o Radio buttons and text fields are **disabled (greyed out)**.

  o No data can be edited when viewing a prior version.

This ensures full visibility of historical Materials Check decisions without risk of accidental changes.

User Interface Update
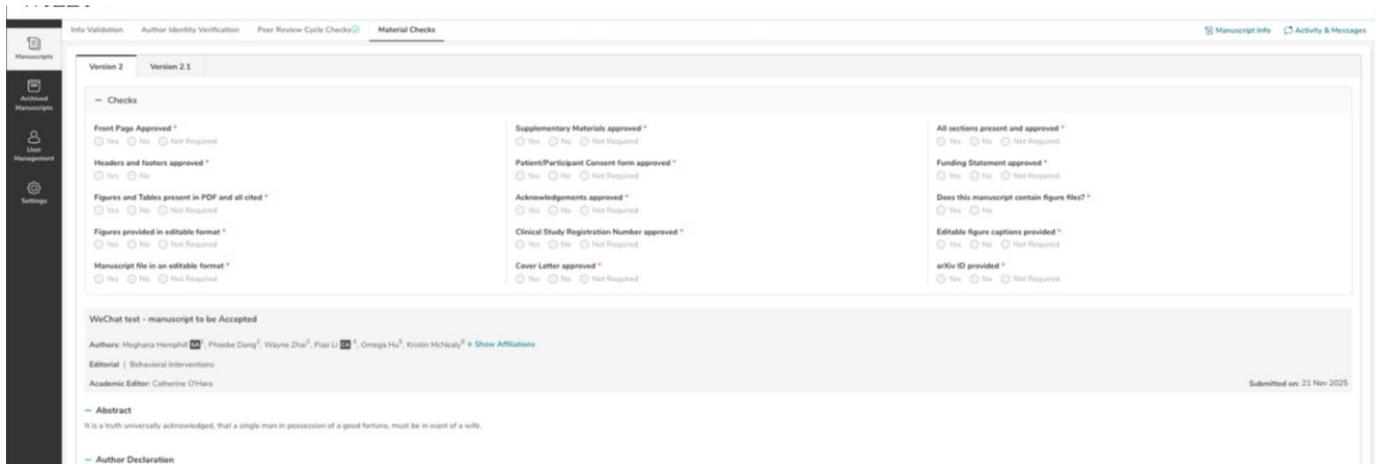
Dec-2025: Full Access Editor Capability

Available from	01-December-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Handling Editors/Chief Editors
Overview	This release provides a new capability available to Handling editors. When activated, editors with Full Access will have the authority to manage any manuscript at any stage of the workflow. They will also be empowered to oversee submissions, make decisions, invite reviewers, and assign or reassign editors across all manuscripts within a journal.

Key Features
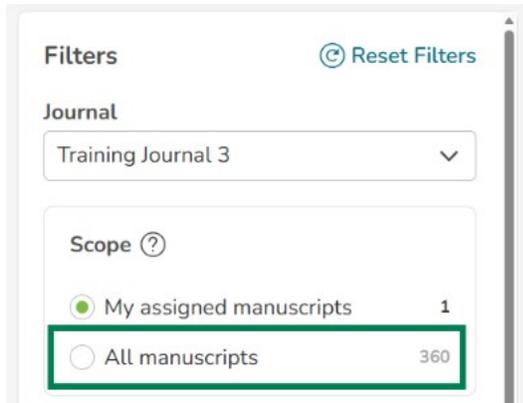
Once Full Access Editor capabilities are in place, editors will notice that all manuscripts appear in their dashboard and that a range of additional actions are available to them at the manuscript level.

Full Access Editors **can**:

o View and can act upon any manuscript at any given stage of the workflow, including those they are not assigned to (except for their own authored manuscripts)

o Make decisions before and after peer review at each stage in the process

o Invite reviewers and manage reviewer assignments and deadlines

o Assign or reassign a new editor to the pre-peer review and peer review stages (providing their role on the editorial board aligns with the stage for that editorial model)

o Participate in manuscript conversations using the conversation tool

o View all actions taken in the activity log for transparency/traceability. Emails sent will be signed with the Full Access editor's name

 Full Access Editors **cannot**:

o Re-assign the manuscript to themselves at any point while the manuscript is in the Review module (this is in development for delivery at a later date).

 Example of the Full Access editor capability to re-assign an Editor for the Pre-Peer Review stage, Invite an editor for the Peer Review stage, or make an immediate decision:

Example of the Full Access editor capability to re-invite an Editor for the Peer Review stage, Invite and manage reviewer reports, or make a decision after reports have been submitted:

By default, **users with the EiC/Chief/Handling Editor role *and* Observing capabilities will have Full Access Editor capabilities enabled.** Where appropriate, any Editor can be granted Full Access Editor capabilities upon request to their Publisher representative.

Limitations

- FAE is a set of capabilities added to an existing editorial role; FAE is not a stand-alone role

- Editors cannot hold both Observing and Full Access capabilities simultaneously (Full Access overrides Observing). Either style can be requested/removed upon request to your Publisher representative

- When Full Access Editor capabilities are removed, editors lose the ability to take further actions on manuscripts previously handled under FAE, but the historical activity remains logged.

- Post-peer review, Full Access Editors can make decisions only, not recommendations.

- Actions taken by the FAE on behalf of the assigned Editor do not trigger notifications to that Editor.

Nov-2025: Editorial Conversation Tool, Phase 2.1

Available from	25-November-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Admins, editorial assistants (EAs), journal managers (JMs), editors with Full Access Editor (FAE) capabilities
Overview	Journal staff with manuscript access, including editorial assistants, journal managers, and full access editors, can now participate in the Conversation Tool.

Key Features

Commenting Capabilities for Admin/JM, FAE, and EA

- Users with existing manuscript access can:
  - Create new comments on manuscripts
  - Reply to existing comments
  - Be notified via email of conversations in which they are participants

Nov-2025: Reviewer Role-Based Visibility Restrictions

Available from	11-November-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Reviewers
Overview	This release introduces targeted updates to the reviewer experience across both single and double anonymous workflows. The changes aim to reduce the risk of reviewers being able to identify author and also streamline the reviewer interface by hiding information unnecessary to their review.

Key Features

Author Declaration Visibility Restrictions

- **Double Anonymous Reviewers** will no longer see responses to:
  - "Is this research supported by funding?"

- o   "Do you or any of your co-authors have a conflict of interest to disclose?"

- • **Single Anonymous Reviewers** retain access to this information to identify potential conflicts.

- • The data availability statement remains to all Reviewers

- • Emails are unaffected by this change

Hide Submission Questions

- • For all peer review model types, all Submission Questions will be hidden from reviewers

User Interface Updates

Author Declarations Tab

- • For double anonymous reviewers:

- o   Funding and COI responses are hidden

- • For single anonymous reviewers:

- o   No change; full visibility retained.

Nov-2025: Queue Invited Reviewers (Pilot Journals Only)

Available from	24-November-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Handling Editors
Overview	This release introduces a streamlined reviewer invitation workflow for peer review management. Users can now queue selected reviewers in a prioritized order and invite only the required number of reviewers. If a reviewer declines or fails to respond within the designated timeframe, the system automatically sends an invitation to the next reviewer in the queue. This approach reduces unnecessary invitations, minimizes wasted reviewer effort, and helps shorten turnaround times.

Key Features

Reviewer Queue Management

- Users can search for reviewers once, create a prioritized queue, and include the option to invite the required number of reviewers with or without customized messaging.

Automated Invitation Handling

When a reviewer declines or does not respond within the set timeframe of 7 days, the system automatically invites the next reviewer in the queue.

Queue Numbering

- The queue is numbered, so editors can easily identify the order in which reviewers will be invited.

Re-invite Reviewer Button

- Added a "Re-invite Reviewer" button for journals with queue-enabled functionality.

User Interface Updates

- Queue numbering is now visible in the UI (top-to-bottom order).

- New "Re-invite Reviewer" and "Re-queue Reviewer" buttons available in queue-enabled journals.

Nov-2025: Show Keywords in the UI for Journals that have PKG for Editor Suggestion Enabled

Available from	12-November-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors

Overview	For journals that use PKG for Editor suggestion, we now display the keywords based on related publication history on Editor Suggestion cards.

For journals that use PKG, we now display the keywords based on related publication history on Editor Suggestion cards. This is an enhancement to the Editor Suggestion card release that introduced Suggested Editor cards containing detailed information about potential invitees. With this release PKG journals now have parity with those using Editor Suggestion Tool (EST).

Nov-2025: Receive transfer 'message for destination editor'

Available from	7 October (Review)-2025, 22 October (Screening) -2025
Impacted Module	Research Exchange **Review** & **Screening**
Impacted Roles	Destination Editor (Editorial Board member assigned to transferred manuscript)
Overview	This release addresses a visibility gap for destination editors (Editorial Board members assigned to the manuscript) handling transferred manuscripts. Previously, when a manuscript was transferred via **Reject & Refer**, the "message for destination editor" provided by the originating editor was not visible to the receiving editorial team. This enhancement ensures that destination editors can now view the transfer context and message directly within the Review and Screening workflows.

Key Features

- Display Transfer Context for Destination Editors

  o When viewing a transferred manuscript, the assigned destination editor can now see:

    ▪ Name of the editor who suggested the transfer

- Date of transfer

- Message for destination editor (entered during Reject & Refer)

- Journal from which the manuscript was transferred

User Interface Updates

- Dashboard – Article Details page (Review)

- Adds a Transfer Details panel for transferred manuscripts into the Manuscript Details page.

o Panel is collapsible and will always appear first in the list of collapsible panels.

o Panel is open by default

o If user collapses the panel, it will not be expanded if that user refreshes that page on the manuscript.

o Panel appears only for manuscripts with a transfer history.

o Panel includes:

- Transfer Date: [MM/DD/YYYY]

- Message for Destination Editor ("from Transferring Editor Firstname Lastname (role)"): [Free-text message entered by originating editor]

- Transferred From: [Journal Name]
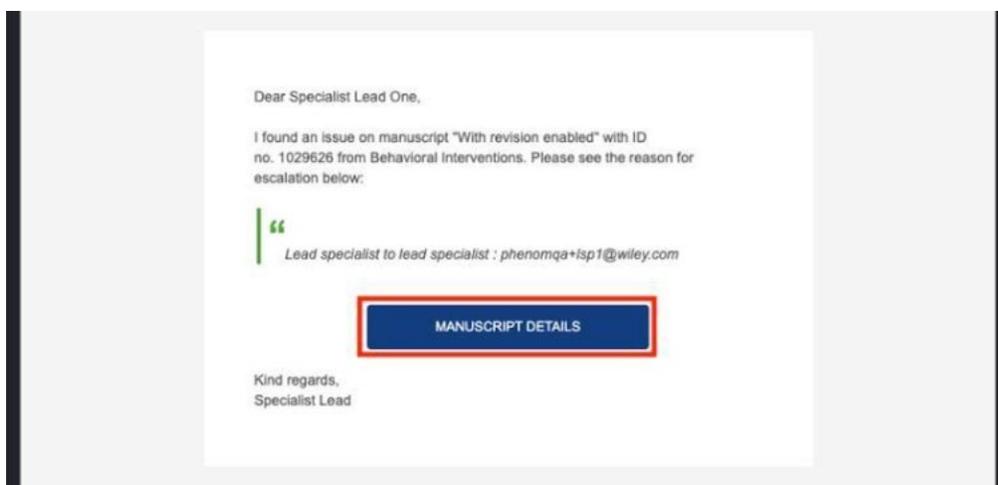
o Information on panel is read-only; cannot be edited.

Transfer Information panel in Review

Updated on 2017-03-13   Version 3 ∨

ID 5694305 [TRANSFERRED]   23 days to submit [INVITE REVIEWERS]

A Key Major Guideline for Engineering Bioactive Multicomponent Nanofunctionalization for Biomedicine and Other Applications: Fundamental Models Confirmed by Both Direct and Indirect Evidence

▪▪▪▪▪ [CA] , Karl Saber [CA] , Ambuj Bhushan Jha, Rama Shanker Dubey, Mohammad Pessarakli, Lakmini Kumari Boralugoda, Ambuj Bhushan Jha, Rama Sh... + Show Affiliations

Article Type
Expression of Concern

Journal
Canadian Journal of Infectious Diseases and Medical Microbiology

Triage Editor: Cassiano Felippe Gonçalves-de-Albuquerque   Academic Editor: Ayodele Temidayo Johnny   Submitted on: 13 Mar 2022 (11 days)

> Abstract

> Author Declaration

> Files ⓘ

— Transfer Information

Date: 19 Sep 2025

Message from Eric Manson (Chief Editor)
I am writing to recommend this manuscript for consideration at your journal. While well-executed research, it falls outside our current scope but aligns perfectly with your publication's focus. The methodology are sound and findings are significant. I believe it would be an excellent fit for your...

Transferred from
Journal of Geophysical Research: Oceans

+ Screening Report

+ Editorial Comments

+ Reviewer Invitation History   0 Reports submitted 0 Overdue 0 Accepted 0 Pending 0 Report not submitted More

+ Reviewer Reports   3 Reports 2 Used

+ Activity Log

No Information Sent from Previous Editor
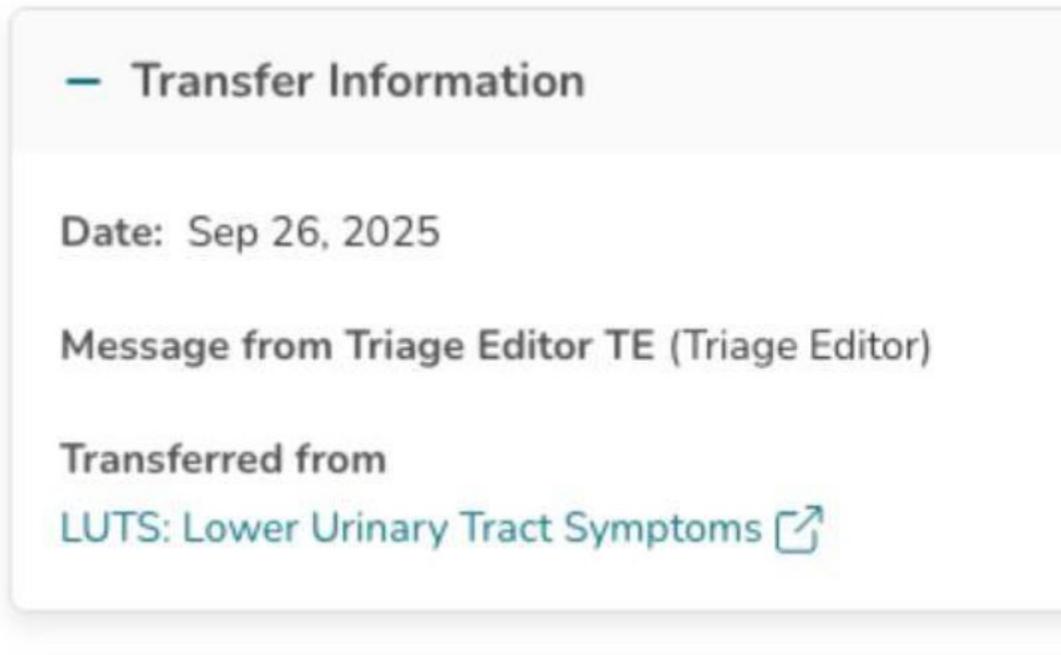
Dashboard – Info Validation Tab (Screening)

- o Adds a Transfer Information panel for transferred manuscripts into the Info Validation Tab

- • Panel appears only for manuscripts with a transfer history.

- • Panel includes:

- o Transfer Date: [MM/DD/YYYY]

- o Message for Destination Editor ("from Transferring Editor Firstname Lastname (Role)"): [Free-text message entered by originating editor]

- o Transferred From: [Journal Name]

- • Information on panel is read-only; cannot be edited.

Transfer Information panel in Screening
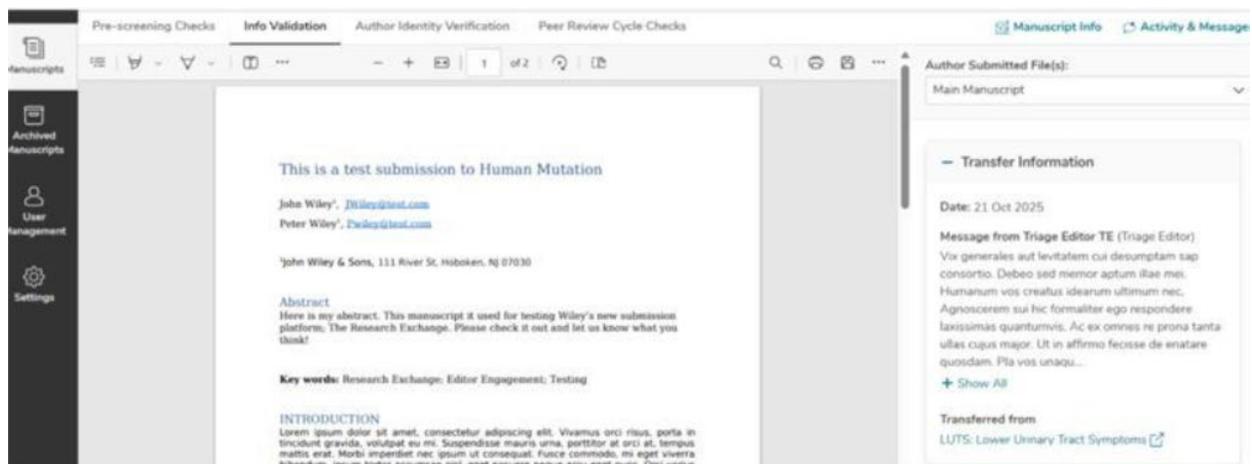
Nov-2025: Add Manuscript Stage & Link to Screening Escalation Email

Available from	11-November-2025
Impacted Module	Research Exchange **Screening**
Impacted Roles	Specialist, Lead Screener
Overview	This update adds the manuscript stage in the subject line and a direct link to the manuscript in the body to all escalation notification emails in Screening

This update adds the manuscript stage in the subject line and a direct link to the manuscript in the body to all escalation notification emails in Screening. This provides specialists/lead screeners with immediate context and one-click access to escalated manuscripts.

Dear Specialist Lead One,

I found an issue on manuscript "With revision enabled" with ID no. 1029626 from Behavioral Interventions. Please see the reason for escalation below:

> " Lead specialist to lead specialist : phenomqa+lsp1@wiley.com

MANUSCRIPT DETAILS

Kind regards,
Specialist Lead

Nov-2025: Bidirectional Linking

Available from	7-November-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Admin users, Editorial Assistant (EA), Journal Managers (JM), Editor assigned on the manuscript, Editors with 'managing' capabilities -Triage, Lead Guest Editors (collectively, "Users")
Overview	This release introduces enhancements to the Linked Papers initiative; bi-directional linking for in-progress papers. If two in-progress papers are linked, the linking will now show up on both automatically.

Key Features

- **Bi-Directional Linking**: When an in-progress paper (Paper A) is linked to another in-progress paper (Paper B), the system automatically creates a reciprocal link from Paper B to Paper A.

- **Status Restriction**: Linking and unlinking are permitted only between manuscripts that are **in-progress**. Linking to Published, QA, Quality Check, or Deleted papers is not allowed.

- **Script for Existing Links**: A migration script will update existing one-way links between in-progress manuscripts (>147 MSs) to ensure bi-directional linking where applicable.

- **Unlink Update**: Unlinking now removes the link from both manuscripts.

- **Activity Log Enhancement**: Activity logs will reflect linking/unlinking actions on both papers involved. Example:

ON PAPER A:
Monica Bruma Admin linked paper: ID 1015805 Research Manuscript – demo 7th of August (PAPER B)
October 10, 2025 at 12:08

ON PAPER B:
Monica Bruma Admin linked paper: ID 1015803 Research Manuscript – ALLALALLALA (PAPER A)
October 10, 2025 at 12:08
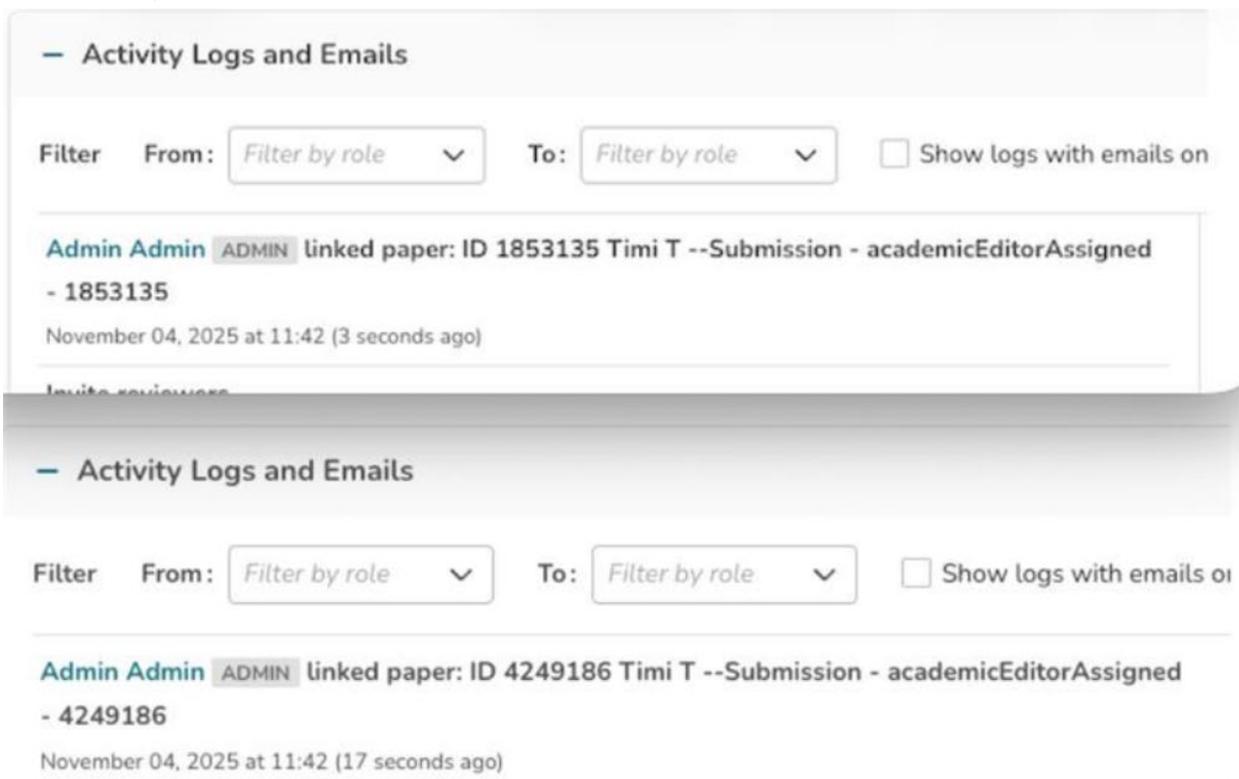
Nov-2025: Updates to Dashboard Cards and Manuscript Details Page

Available from	20-October-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors

Overview	We now display metrics on Reviewer Invitations and Reviewer Reports display

To better summarize the status of Reviewer Invitations and Reviewer Reports for editors directly in the Dashboard, we have introduced three sets of metrics

- Reviewer reports (metrics for the current manuscript version)

- Reviewer invitation statuses (metrics for the current manuscript version)

- Required reviewers for accept decision (metrics across all manuscript versions)

Editor dashboard listing three manuscript cards. Each card displays the three categories of metrics listed above

 Editors can opt for a simplified view of the dashboard, where only the first category of metrics is displayed: Reviewer Reports

- They may hide the other two categories across the board in one move by turning off the 'Detailed view' toggle at the top –right of the dashboard, near the 'Sort by' function

'Detailed view' toggle. Action is across the entire dashboard.
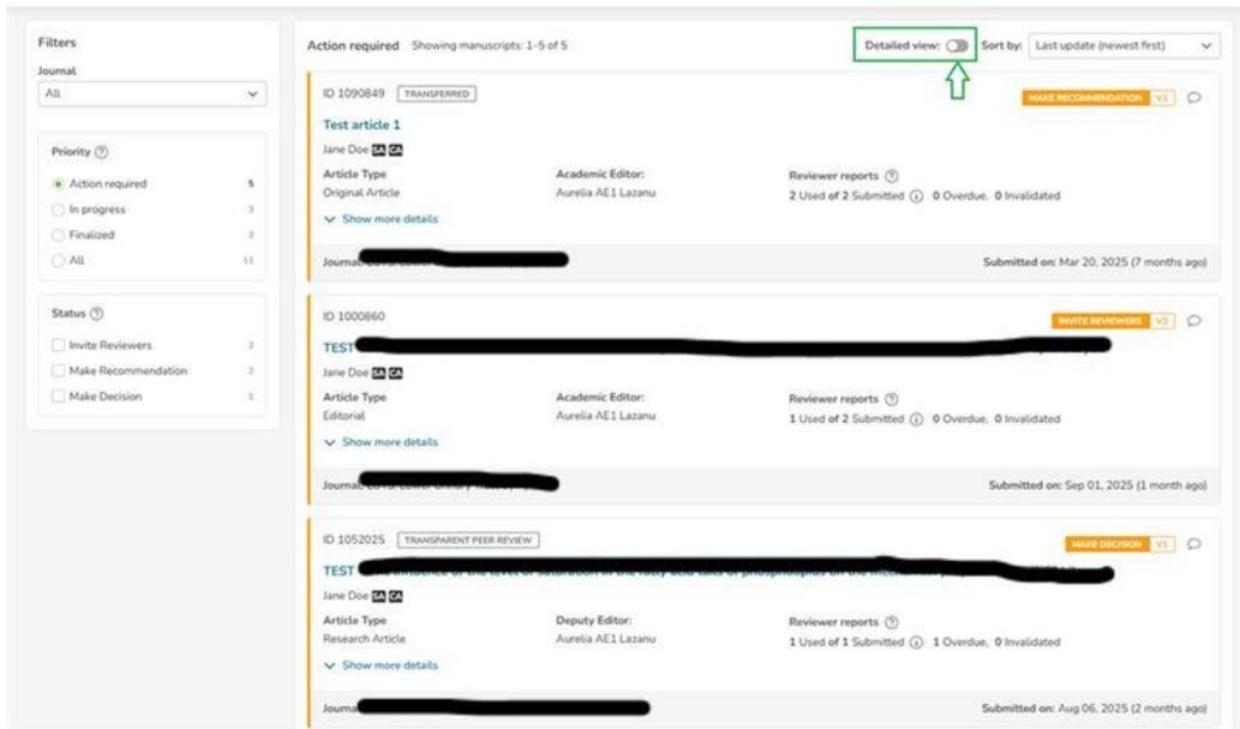
- They may also hide the other two categories at card level, by clicking on the 'Show less details' button per card. They may revert the action and display all categories again by clicking on the 'Show less details' button

'Show less details' button – card A. After clicking on the button in card A, the two categories are hidden, as displayed on card B. On card B, button changes to 'Show more details' to enable the choice to view all categories. These actions are per card.

Reviewer reports (metrics for the current manuscript version)

These metrics offer information on reviewer reports on the current version, combining the following sources:

- **Submitted** - reviewer reports submitted by reviewers that accepted invitations to review the current version or transferred from the original submission rejected in another journal and transferred to the current journal (all valid reports)

- **Used** – from the total of submitted reports, only the ones that are selected by the editor to be used in the peer review process

- **Overdue** - reviewer invitations accepted by the reviewer that passed the deadline to submit the report and are marked as overdue (status on the invitation is REPORT NOT SUBMITTED)

- **Invalidated** – reports that have been marked as invalid in Quality Checks due to Conflicts of Interest between the authors and the reviewer or Improper Review identified later in the flow and automatically removed from peer review

'Reviewer reports' metrics on the current version. Reports source popover will display all Submitted reports broken-down by source.

'Transferred' reports can exist only on V1 and only if the manuscript is a transfer from another journal and has imported reviews.

Reports from 'Previous reviewers' can only exist on revisions, where reviewers that reviewed previous versions can be re-invited on the current version.

 Reviewer invitation statuses (metrics for the current manuscript version)

These metrics offer information on reviewer invitations sent on the current version with no report submitted and not overdue; listing the count of invitations in all possible statuses (Fig.5):

- Statuses with potential to generate a reviewer report: Accepted; Pending

- Statuses with no potential to generate a reviewer report: Expired; Declined; Revoked (reviewers in these statuses can be re-invited)

'Reviewer invitation statuses' metrics on the current version.

Jane Doe **SA** **CA**

Article   These metrics are for this manuscript   c Editor:
Original   version.   E1 Lazanu

Reviewer invitation statuses ⑦
1 Accepted, 1 Pending, 1 Declined, 2 Expired, 0 Revoked

∧ Show less details

Required reviewers for accept decision (metrics across all manuscript versions)

These metrics offer information on the number of individual reviewers that have contributed valid reports selected by the editor to count for peer review against the minimum criteria to unlock the 'Acceptance' decision (Fig.6).

'Required reviewers for accept decision' metrics on the current version.

Required reviewers for accept decision
1 of 2 Required unique reviewers ⑦

F phospholipids on   er.

        A unique reviewer is an individual who
        evaluates the manuscript and counts as 1
        towards the minimum required, regardless
Reviewer re   of how many versions they review.
1 Used of 2
        This metric is across versions.

Required reviewers for accept dec..ion
1 of 2 Required unique reviewers ⑦

Manuscript Details Page Updates

The information displayed on the manuscript card in the three categories detailed in the first section correlate with information displayed in the Manuscript Details Page, accessed after clicking on a manuscript card (Fig.7):

Dashboard Manuscript Card	Manuscript Details Page
Reviewer report	Header of [Reviewer Reports] & [Reviewer Invitation] modals, top-right
Reviewer invitation statuses	Header of [Reviewer Invitation] modal, top-right
Required reviewers for accept decision	Header of [Your Editorial Recommendation]/ [Your Editorial decision] modal, top-right

Reviewer Reports and Reviewer Invitations metrics within the Manuscript Details Page

Reviewer invitations

Reviewer Reports

— **Reviewer Reports**   2 Reports submitted   2 Used

Transferred Reviewer Reports   ⓘ About Transferred Reports

Reviewer 1: Aurelia R1 Lazanu   TRANSFERRED   Oct 06, 2025

Email:
aapetrei+r1@wiley.com

REVIEWER ACTIVITY
Invited: Oct 06, 2025
Accepted: Oct 06, 2025
Submitted: Oct 06, 2025

Recommendation:
MINOR REVISION

Reviewer Report:
Test R1

Would you like to receive recognition for your review using Web of Science™?
No, I don't want to receive recognition

Manage report for editorial recommendation/decision ⓘ
✅ Report is used for editorial recommendation/decision.   Edit Selection

                                                    ⓘ About Invited Reviewer Reports
Invited Reviewer Reports

Reviewer 2: Aurelia R5 Lazanu   Oct 06, 2025

Email:
aapetrei+r5@wiley.com

REVIEWER ACTIVITY
Invited: Oct 06, 2025
Accepted: Oct 06, 2025
Submitted: Oct 06, 2025

Recommendation:
ACCEPT

Reviewer Report:
Test R5

Would you like to receive recognition for your review using Web of Science™?
No, I don't want to receive recognition

Manage report for editorial recommendation/decision ⓘ
✅ Report is used for editorial recommendation/decision.   Edit Selection

Your Editorial Recommendation

Nov-2025: User Manages Email Notifications for Conversations

Available from	09-October-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors
Overview	Phase 2 of the Editorial Conversation Tool will introduce enhanced collaboration features as editors can now tag other editors in comments. This related release provides editors with control over email notifications for conversation messages, reducing inbox overload while maintaining visibility of critical actions.

Key Features

Email Notification Management

Editors can now manage their email preferences for conversation messages:

- Turn email notifications on or off for conversation messages.

- Changes apply globally across all manuscripts from the time of update.

Quick Access to Preferences

Every email notification includes a hyperlink to the email preferences page in Review for easy navigation.

User Interface Updates

Profile Settings

A new section in the editor profile allows self-management of email preferences at any time.

Email Preferences Page

Displays "Conversation" as a configurable message type with toggle options:

- On: Receive email notifications for new conversation messages.

- Off: Stop receiving email notifications for conversation messages.

Profile settings for email notifications

New Comment email notification

Dear [[RECIPIENT_TITLE]] [[RECIPIENT_GIVEN NAME]] [[RECIPIENT_SURNAME]],

A new comment has been added to the manuscript "[[MANUSCRIPT_TITLE]]" in [[JOURNAL_NAME]].

Comment Details
Added by: [[COMMENTER_GIVENNAME]] [[COMMENTER_SURNAME]] ([[COMMENTER_ROLE]])
Date: [[COMMENT_DATE]]
Comment Preview: [[COMMENT_PREVIEW_TEXT]]

READ COMMENT

Kind regards,
[[JOURNAL_NAME]]

If you would no longer like to receive comment notifications, please update notification settings in your Profile.

New Reply email notification

Dear [[RECIPIENT_TITLE]] [[RECIPIENT GIVEN NAME]] [[RECIPIENT_SURNAME]],

A new reply has been added to the manuscript "[[MANUSCRIPT_TITLE]]" in [[JOURNAL_NAME]].

Comment Details
Added by: [[COMMENTER_GIVENNAME]] [[COMMENTER_SURNAME]] ([[COMMENTER_ROLE]])
Date: [[COMMENT_DATE]]
Comment Preview: [[COMMENT_PREVIEW_TEXT]]

READ REPLY

Kind regards,
[[JOURNAL_NAME]]

If you would no longer like to receive comment notifications, please update notification settings in your Profile.

Nov-2025: Extra Dashboard Filters for Editors

Available from	4-Nov-2025
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors
Overview	This release improves the Editor experience by increasing the filtering options on the Editor Dashboard

Key Features

New Filter Sections

Using the Status, Article Type, Other properties categories, Editors can filter down relevant manuscripts to their liking. These sections will appear as manuscripts become visible in the Editor's view – for example, if the user doesn't have any transferred, special issue or commissioned manuscripts in view, the Other properties category will not be shown as there won't be any relevant manuscripts to filter. Different to the "Priority" sections component, the majority of these filters are multi-selection and can be used to triage the view to all the relevant manuscripts that the Editor needs to view. Here is a more detailed list of the newly added filters:

- Article type: This section allows further filtering based on the article types of the manuscripts in view. Similar to the existing Status filter, this component is shown as the Editor receives manuscripts. Example:

- Other properties: This component includes 3 states that a manuscript may have: Part of special issue, Commissioned and Transferred. Similar to the above, this component will only be shown when the Editors have such manuscripts in their existing view. Example:
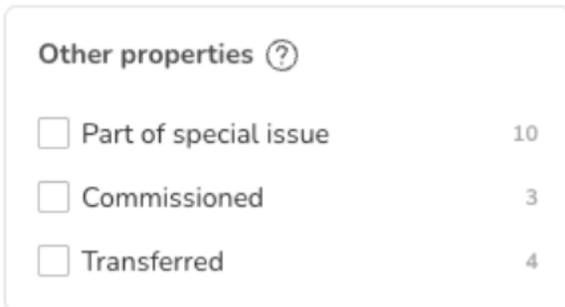
Additional Updates

- Switch from dropdown to checkboxes for status filtering

- Change default sorting to Last Updated (oldest)

- Add helper text (popovers) to the filter categories to help users understand them

User Interface Updates

Additional filters added

"Sort by" default is "Last Update (oldest first)"

Editorial Oversight Filter

Where "Journal-wide" refers to the entire journal that the Editor has Oversight or Managing capabilities, "Assigned to me" is obviously for manuscripts assigned to said user, "Reviewer" is where the user has papers served as a reviewer and finally, "Author" is for old legacy Phenom submissions which the vast majority of users shouldn't get.

Popover with additional information for each filter category

- **Action required**
  Manuscripts needing your immediate action: editor assignments, reviewer invitations, recommendations, or decisions.

- **In progress**
  Manuscripts awaiting action from others. May return to Action Required when your input is needed again.

- **Finalized**
  Manuscripts with completed workflow requiring no further action.

- **All**
  View manuscripts in all workflow stages, regardless of status.

Finalized   4

All   32   Action requi

Status ⑦

You can choose a status from the available manuscripts on the current page. The available statuses change when you select a different priority from above.

Invite Rev

Make Recommendation   2   Automation

Make Decision   1   Article Typ

Status ⑦

☐ Invite Reviewers   13

☐ Make Recommendation   2

☐ Make Decision   1

Article type ⑦

☐ Original Article

☐ Review Article   4

☐ Book Review   3

☐ Short Communication   3

☐ Brief Communication   1

☐ Research Article   1

Here you can filter manuscripts based on the Article types the manuscripts on your dashboard have.

Action required

ID 3538403

Additive Manu

Reviewer Report

Journal: LUTS: Lo

ID 2122510

☐ Research Article   1

Other properties ⑦

☐ Part of special issue

Here you can filter manuscripts based on the following: trasferred content, Part of special issue, Commissioned

Advanced Control Str

A CA

Article Type: Review Arti

Reviewer Reports: 0 Invit

Nov-2025: [Dashboard filters] Implement checker team and individual assignment filters

Available from	4-Nov-2025
Impacted Module	Research Exchange **Screening**
Impacted Roles	Lead Screeners, Admins
Overview	This release introduces enhanced workload visibility and filtering capabilities for Lead Screeners and Admins managing checker assignments. The update enables dynamic analysis of submission distribution across teams and individuals, supporting informed decisions on workload redistribution and performance monitoring.

Key Features

- Team & Individual Workload Visibility

  o Display of submission counts both by team and by individual checkers in dropdown menus

  ▪ If no specific team selected, all available checkers displayed grouped by team

  ▪ If no checkers are present in a team, the dropdown will not be displayed

  o Admins can filter by submission status (Assigned, Unassigned, All).

  o Lead Screeners see only assigned submissions (Assignment status filter hidden).

- Contextual Workload Analysis

  o Filters for manuscript type, processing stage, and status conditions.

  o Workload counts dynamically updated based on filter selection

  o Visibility into workload patterns under specific manuscript states (e.g., paused, returned to draft).

- Filter Management & Decision Support

  o Reset filters individually or all at once.

  o Immediate visual feedback and real-time data updates upon filter changes.

  o Consistent filter state across analysis scenarios.

User Interface Updates

- New Filters Panel:

- o Admin view includes Assignment status filter (All, Assigned, Unassigned).

- ▪ Lead screener view excludes Assignment status filter

- • Workload Dashboard Enhancements:

- o Teams displayed with clear delimiters; individual checkers grouped under respective teams.

- o Dropdown for checkers hidden if no checkers exist in a team.

- • Dynamic Count Indicators:

- o Real-time updates when filters are applied or reset.

Admin View – Containing Assignment Status

Lead Screener View – Without Assignment Status

Archived Manuscripts

Issue type

All ⌄

Manuscript stage

All ⌄

Manuscript assignment

Checker team

All ⌄

Checker

All ⌄

All stages 93

Action required	0
☐ Escalated	2
Work in progress	0
☐ New manuscript stage	81

Lead Screener View (note you can't select Screening Team from Checker filter in either Admin or Lead Screener View)

Checker Teams

NOTE: If a Team only includes lead screeners, the papers they are handling will appear to be "unassigned"

Individual Checkers on Selected Team

Individual checkers grouped by Team

Results Updated by Application of Filter