

# Research Exchange

## Roles and Responsibilities

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## Introduction

Research Exchange has multiple system roles and added capabilities to support a variety of editorial roles. Users can have more than one system role on a Journal Editorial Board, but only one per manuscript.

## Assigning Roles and Capabilities

All roles will be configured prior to your journal migration. If you need to make any adjustments at any time, please contact your platform representative for assistance.

### *Role vs Capability*

Research Exchange has multiple system roles and added capabilities to support a variety of editorial roles. Roles in Research Exchange are system-level designations that determine what tasks a user can perform within specific modules. Users can have more than one system role on a Journal Editorial Board, but only one per manuscript.

Capabilities refer to specific permissions or functions attached to roles, enabling users to perform additional actions within the platform.

### *Dual Roles*

On occasion, individuals may be assigned dual roles. For instance, a user may hold up to four checker roles concurrently, or an Editorial Assistant position may be combined with that of a Journal Manager. However, some roles cannot. See below which combination of roles is not available:

1. The Checker roles cannot be granted with a Lead Screener or Specialist Team roles, and vice versa.
2. The Lead Screener role cannot be granted with a Specialist Team role and vice versa.
3. The Editorial Assistant and Journal Manager roles cannot be granted with any Editor roles and vice versa.
4. If an Editorial Assistant is granted the Journal Manager role on one journal, they must be granted Journal Manager on all the journals in their portfolio.

### Overview of Roles and Capabilities per Module

Submission Module	Screening Module	Review Module	Commission Module
Submission Administrator	Submission Checker	Editorial Assistant	Editorial Assistant
	Revision Checker	Journal Manager	Journal Manager
	Quality Checker	Triage Editor/Associate Editor	Triage Editor/Associate Editor
	Material Checker	Lead Guest Editor	Lead Guest Editor
	Lead Screener	Academic Editor	Academic Editor
	Specialist Team	Guest Editor	Guest Editor
		Reviewer	
		Observing Capability	

Submission Module	Screening Module	Review Module	Commission Module
		Full Access Capability	

## Submission Module

### Submission Administrator

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editorial Assistants
- Journal Administrators
- Managing Editors

Key Tasks	Module
Proxy as the author to support file uploads at submission, revision, and material check stages	Submission Admin
Monitor submissions	Submission Admin
Add Comments to submissions	Submission Admin
Change submission ownership	Submission Admin
Submit on behalf of an author	Submission Admin

## Screening Module

### Submission Checker

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editorial Assistants
- Journal Administrators
- Managing Editors

A person can be given more than one checker role if needed.

Key Tasks	Module
Find manuscripts needing submission checks	Screening
Carry out initial checks such as pre-screening checks, info validation, and author identity verification	Screening
Escalate and pause the manuscript	Screening
Escalate to a Lead Screener with file attachments	Screening
Escalate to a Specialist Team with file attachments	Screening
Return the manuscript to draft	Screening
Withdraw a manuscript	Screening
Refuse to consider a manuscript	Screening
Approve a manuscript for peer review	Screening

## Revision Checker

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editorial Assistants
- Journal Administrators
- Managing Editors

A person can be given more than one checker role if needed.

Key Tasks	Module
Find manuscripts needing revision checks	Screening
Review initial submission check results	Screening
View results of initial submission checks	Screening
Carry out submission checks, peer review cycle checks, and material checks on revised manuscripts	Screening
Escalate and pause the manuscript	Screening
Escalate to a Lead Screener with file attachments	Screening
Escalate to a Specialist Team with file attachments	Screening
Return the manuscript to draft	Screening
Withdraw a manuscript	Screening
Refuse to consider a manuscript	Screening
Approve a manuscript to move back into peer review	Screening

## Quality Checker

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editorial Assistants
- Journal Administrators
- Managing Editors

A person can be given more than one checker role if needed.

Key Tasks	Module
Find manuscripts needing quality checks	Screening
Review initial submission and revision check results	Screening
Carry out Peer Review cycle Checks	Screening
Access results of the Unusual Activity Detection tool	Screening
Escalate and pause the manuscript	Screening
Escalate to a Lead Screener with file attachments	Screening
Escalate to a Specialist Team with file attachments	Screening
Return the manuscript to draft	Screening
Withdraw a manuscript	Screening
Refuse to consider a manuscript	Screening
Approve a manuscript to move to final material checks	Screening

## Material Checker

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editorial Assistants
- Journal Administrators
- Managing Editors

A person can be given more than one checker role if needed.

Key Tasks	Module
Find manuscripts needing material checks	Screening
Review initial submission and revision check results	Screening
Review Peer Review Cycle Check results	Screening
Review manuscript files by designation or request additional files from the author	Screening
Escalate and pause the manuscript	Screening
Escalate to a Lead Screener with file attachments	Screening
Escalate to a Specialist Team with file attachments	Screening
Return the manuscript to draft	Screening
Withdraw a manuscript	Screening
Refuse to consider a manuscript	Screening
Approve a manuscript to move to final material checks	Screening

## Lead Screener

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Senior Administrators
- Senior Managing Editors
- Editorial Assistant Team Leads

Key Tasks	Module
Filter to escalated manuscripts from checkers that require action	Screening
View and action manuscripts at any stage on behalf of a Submission, Revision, Quality, or Material Checker	Screening
View an overview of submission distribution across checkers and teams	Screening
Escalate manuscripts to Specialist Teams with file attachments	Screening
Return escalated manuscripts to Peer Review at the Peer Review Cycle Checks stage	Screening

## Specialist Team

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Platform specialist teams
- Journal-specific specialist teams (e.g., copyeditors)

Key Tasks	Module
Filter to escalated manuscripts from Checkers or Lead Screeners that require action	Screening
View results of Submission, Revision, and Quality Checks	Screening
Escalate manuscripts to the Lead Screener or other Specialists with attachments	Screening
Return escalated manuscripts to Checkers with file attachments	Screening

## Review Module

### Editorial Assistant

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editorial Assistants
- Journal Administrators
- Managing Editors

**Available on:** All workflows in the Review module.

Key Tasks	Module
View all manuscripts submitted to the journal in the peer review stage	Review
Withdraw a manuscript on behalf of an author	Review
Extend author revision deadlines	Review
Apply an Article Processing Charge (APC), request manual price overrides, and apply APC discount codes	Review

Key Tasks	Module
Use the conversation tool	Review
Assign, reassign, invite, or re-invite Editors at the Pre-Peer Review and Peer Review Stages	Review
Make recommendations and decisions on behalf of editors	Review
Find and invite reviewers on behalf of editors	Review
Extend reviewer deadlines on behalf of editors	Review

### Journal Manager

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editorial Assistants
- Journal Administrators
- Managing Editors
- Peer Review Performance Leads/Teams

**Available on:** All workflows in the Review module.

Key Tasks	Module
View all manuscripts submitted to the journal in the peer review stage	Review
Withdraw a manuscript on behalf of an author	Review
Extend author revision deadlines	Review
Apply an Article Processing Charge (APC), request manual price overrides, and apply APC discount codes	Review

Key Tasks	Module
Use the conversation tool	Review
Assign, reassign, invite, or re-invite Editors at the Pre-Peer Review and Peer Review Stages	Review
Make recommendations and decisions on behalf of editors	Review
Find and invite reviewers on behalf of editors	Review
Extend reviewer deadlines on behalf of editors	Review
Assign and remove editorial roles from a journal's editorial board for regular and special issues	Review
View the journal's open Special Issues, publish Special Issues, and assign Lead Guest Editors	Review
Grant observing capabilities to editors on the journal's board	Review

### Handling or Associate Editor

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editors-in-Chief
- Handling Editors
- Senior Editors

**Available on:** All 2 and 3-tier workflows in the Review module. Regular Issues, with occasional assignment of Special Issues in certain cases with identified conflicts of interest.

<b>Key Tasks <i>(Only available on manuscripts they have been assigned a role on)</i></b>	<b>Module</b>
View and access manuscripts from the dashboard	Review
Use the conversation tool	Review
Make recommendations and decisions (before and after the peer review stage)	Review
Assign, reassign, invite, or re-invite Editors to the Peer Review Stage	Review
Find and invite reviewers (using self-assign functionality)	Review
Extend reviewer deadlines (using self-assign functionality)	Review

### Lead Guest Editor

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editors-in-Chief
- Handling Editors
- Senior Editors
- Guest Editors

**Available on:** All 2 and 3-tier workflows in the Review module. Special Issues only.

<b>Key Tasks (Only available on manuscripts they have been assigned a role on)</b>	<b>Module</b>
View and access manuscripts from the dashboard	Review
Use the conversation tool	Review
Make recommendations and decisions (before and after the peer review stage)	Review
Assign, reassign, invite, or re-invite Editors to the Peer Review Stage	Review
Find and invite reviewers (using self-assign functionality)	Review
Extend reviewer deadlines (using self-assign functionality)	Review

### Academic Editor

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editors-in-Chief
- Associate Editors
- Senior Editors
- Handling Editors

**Available on:** All workflows in the Review module. Regular Issues, with occasional assignment of Special Issues in certain cases with identified conflicts of interest.

<b>Key Tasks (Only available on manuscripts they have been assigned a role on)</b>	<b>Module</b>
View and access manuscripts from the dashboard	Review

<b>Key Tasks (Only available on manuscripts they have been assigned a role on)</b>	<b>Module</b>
Use the conversation tool	Review
Make recommendations and decisions (before and after the peer review stage)	Review
Find and invite reviewers	Review
Extend reviewer deadlines	Review

### Guest Editor

This system role can be given to anyone required to carry out the following tasks for their journal. This is usually mapped to the following editorial roles:

- Editors-in-Chief
- Associate Editors
- Senior Editors
- Handling Editors

**Available on:** All workflows in the Review module. Special Issues only.

<b>Key Tasks (Only available on manuscripts they have been assigned a role on)</b>	<b>Module</b>
View and access manuscripts from the dashboard	Review
Use the conversation tool	Review
Make recommendations and decisions (before and after the peer review stage)	Review

<b>Key Tasks (Only available on manuscripts they have been assigned a role on)</b>	<b>Module</b>
Find and invite reviewers	Review
Extend reviewer deadlines	Review

## **Reviewer**

This system role can be given to anyone required to submit a review for a journal.

**Available on:** All workflows in the Review module.

<b>Key Tasks (Only available on manuscripts they have been assigned a role on)</b>	<b>Module</b>
Respond to invitations to review manuscripts	Review
Make recommendations on new or revised manuscripts	Review

## **Observing Capability**

This additional capability can be given to any editor on the editorial board. Once enabled, editors will have visibility of all manuscripts submitted to the journal within the Review module, rather than being limited to those specifically assigned to them. However, they will not be able to take action on those manuscripts.

**Available on:** All workflows in the Review module upon request. Requests must be sent to someone with a Journal Manager user role.

## **Full Access Capability**

This additional capability can be given to any Chief Editor on the editorial board. Once enabled, editors will have visibility of all manuscripts submitted to the journal within the Review module, rather than being limited to those specifically assigned to them.

They will be able to take action on those manuscripts. Full Access Editors will have the ability to:

- View and act on all submissions within your journal, except manuscripts you have authored.
- Make editorial decisions, invite reviewers, and assign or reassign editors as needed.
- Perform these actions with full transparency, as all activities will be logged under your account.

**Available on:** All workflows in the Review module upon request. Requests must be sent to a platform representative to raise a support ticket request.

## Commission Module

### Role Mapping

User roles from the Review module map directly to the Commission module.

**Available on:** All workflows in the Review module.

### Editorial Assistants and Journal Managers

Key Tasks	Module
View all commissions submitted to the journals in their portfolio	Commission
Create submissions on behalf of editors for the journals in their portfolio	Commission
Edit all submissions created for the journals in their portfolio	Commission

Key Tasks	Module
Invite/re-invite authors and withdraw invitations for the journals in their portfolio	Commission

#### All Editors

Key Tasks	Module
View all commissions created for the journals in their portfolio*	Commission
Create or edit their own commissions for journals in their portfolio*	Commission
Invite/re-invite authors and withdraw invitations for their own commissions*	Commission

*\*Lead Guest Editors and Guest Editors can only view commissions created for Special Issues they are assigned to on the Journal.*