Research Exchange Screening
Research Exchange Review

Release Notes

Last Updated July 22, 2026

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July-2026: Rescind Rejection

Available from	28-July-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editorial Assistant, Journal Manager, Journal Admin
Overview	This release expands the ability to reopen a manuscript after an initial Reject decision. Editorial Assistants, Journal Managers, and/or Journal Admins can rescind the "Reject" decision, restore the manuscript to the appropriate pre-Quality Check peer review status, and continue the Review workflow. The action is fully audited in the activity log and automatically notifies the assigned Editor.

Key Features

"Rescind Decision" allows Editorial Assistants (EAs), Journal Managers (JMs) or Journal Admins to rescind a rejection decision on the Manuscript Details page.

- If the manuscript was in "Make Decision" or "Make Recommendation" status prior to Rejection, the manuscript is restored to its last status before a decision was made.
- If manuscript was in any other status, the manuscript moves to "Invite Reviewers" stage (See "Manuscript Statuses for Rescind Rejection", below)

Users can add reason(s) for rescinding rejection in a free text field

- Will be displayed in a pop-over on Manuscript Details page (See: UI Updates, below)

Email notifying of the rescindment is automatically sent to:

- Author(s)
- All Editors of original
- Editorial Assistant

Rescinded rejection is logged in Activity log

All Reject decisions (Reject, Reject - Do Not Transfer, Reject and Send to Transfer Services, Reject and Refer) are available to rescind

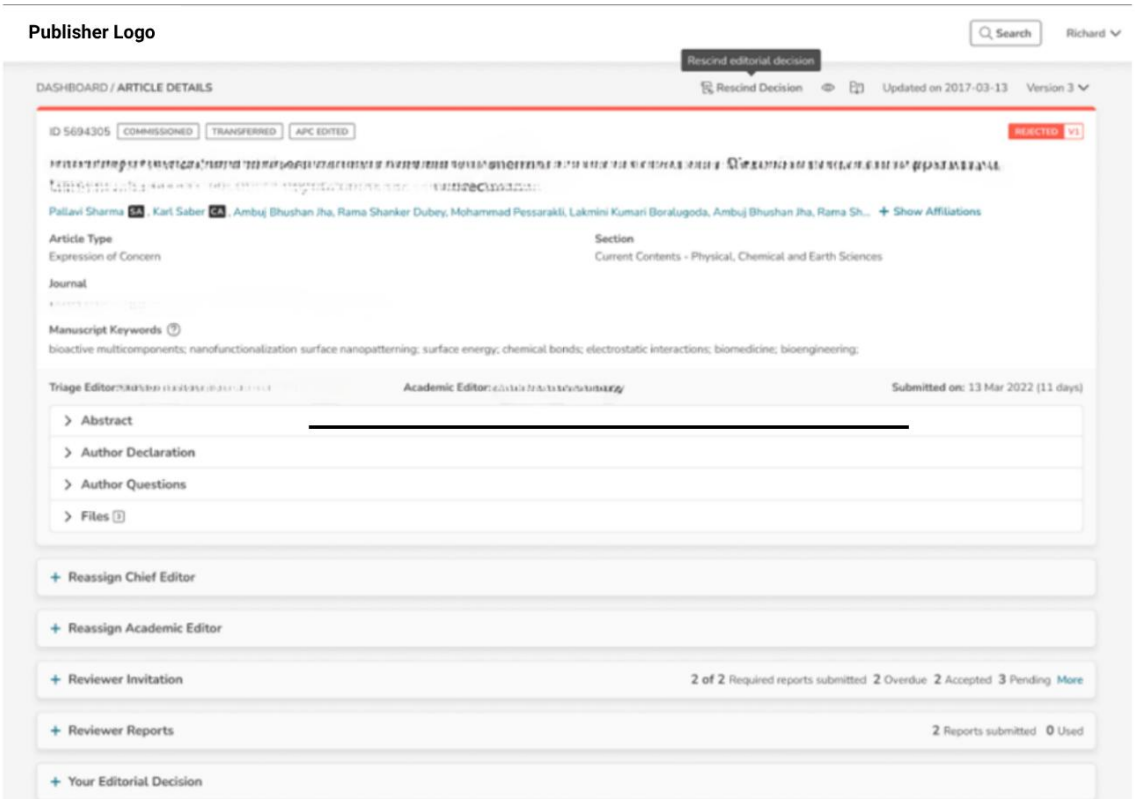
Undertaking a Rescindment automatically re-opens the Price Proposal tool for the article, allowing authors to go on to manage their APC if they progress to Accept without Customer Support intervention

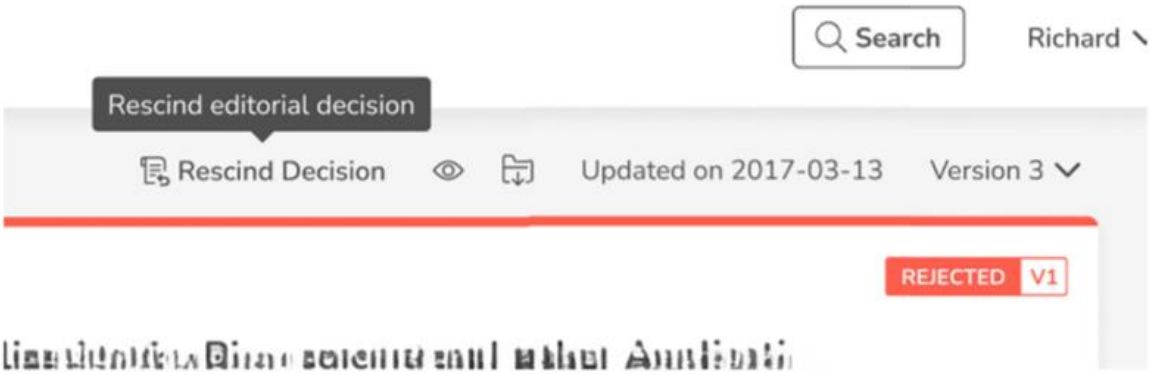
The ability to rescind a rejection is configured at the journal level

User Interface Updates

Review

“Rescind Decision” selection replaces “Withdraw Manuscript” selection at top of the Article Details page (after decision has been entered)

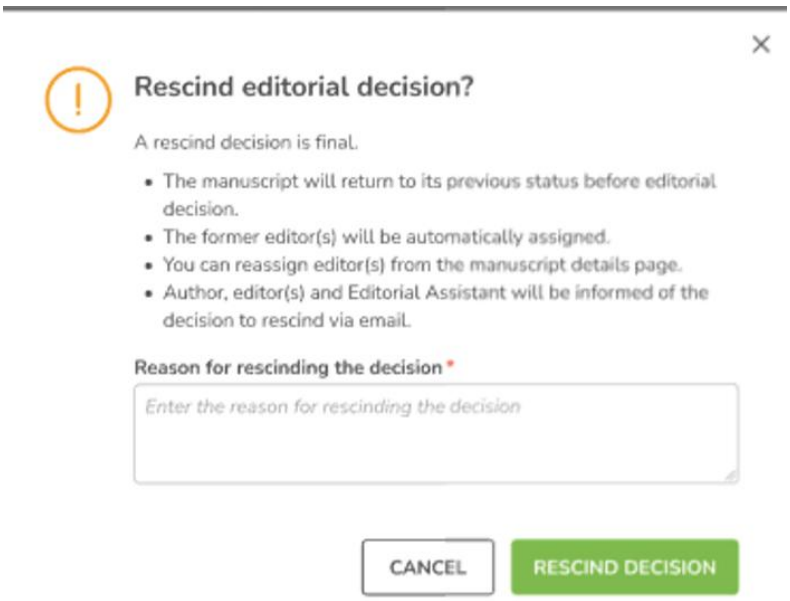




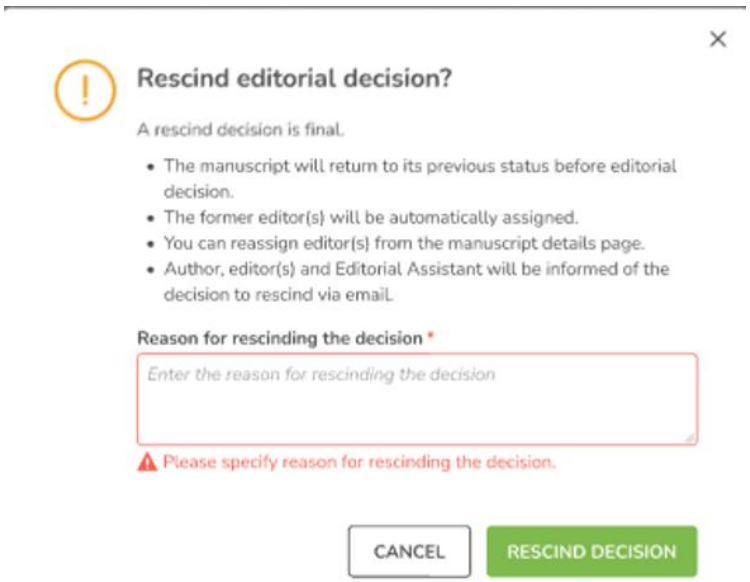
Upon selection of “Rescind Decision”, a modal is displayed. Modal contains a free-text field labeled “Reason for rescinding the decision” and two buttons:

•Cancel

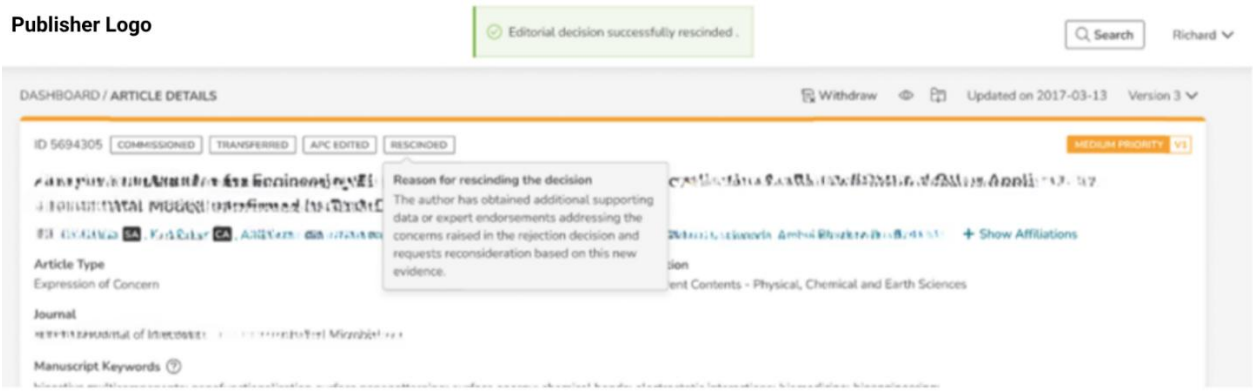
•Rescind Decision



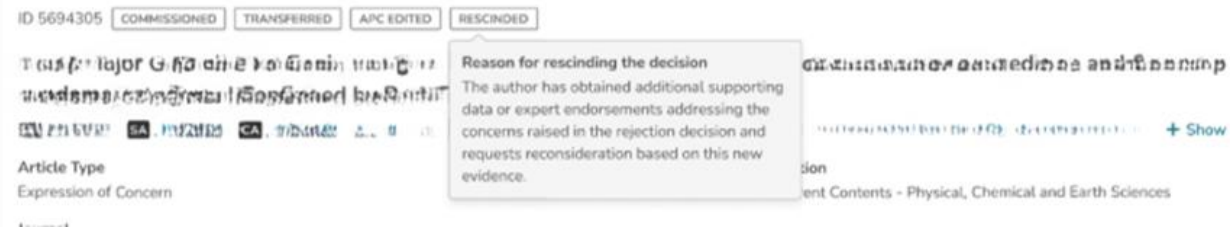
User must enter text in the “Reason for rescinding the decision field”.



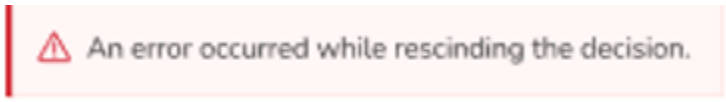
A confirmation toast will be displayed when the decision has been successfully rescinded.



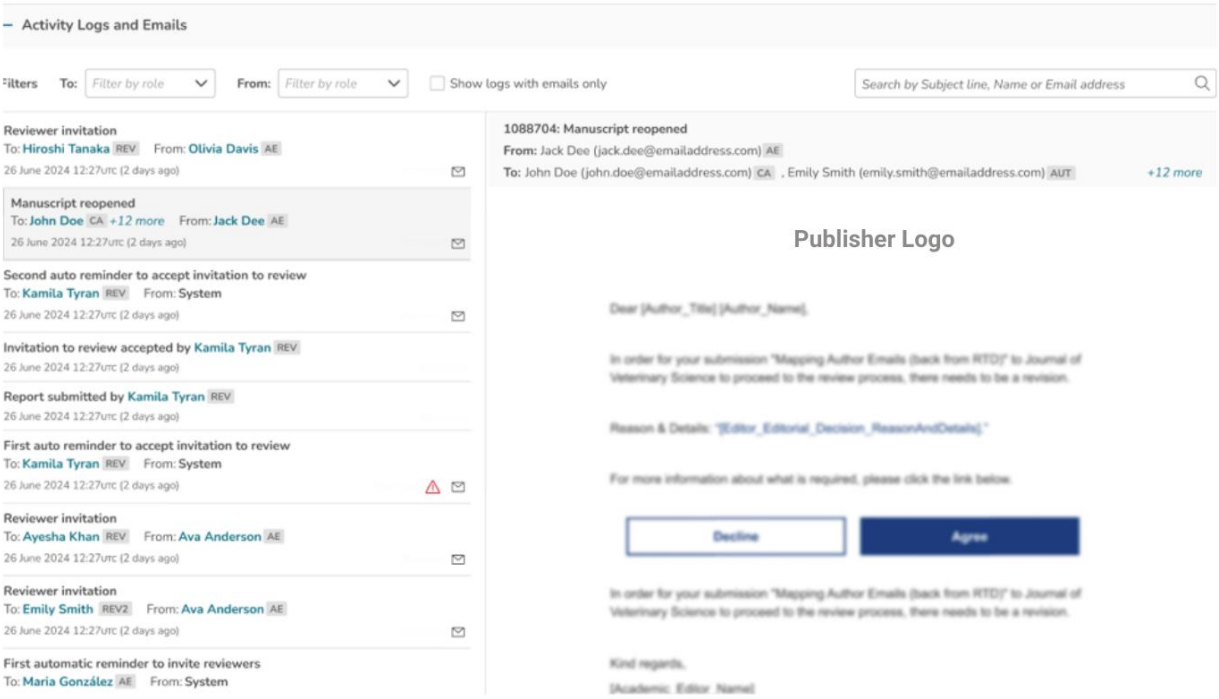
A “Rescinded” tag will be displayed when the decision has been successfully rescinded. The reason is displayed in the popover upon hover on the “Rescinded” tab.



If not successful, an error toast will be displayed.



Rescinded action noted in Activity Log and Emails section.



The Rescind button is hidden

- If the user with a role that does not have access (Reviewer, legacy author, unassigned EA, etc.)
- If the functionality is disabled at the journal by the Wiley administrator.
- If Customer Support rejected manuscript

The rescind button greyed out (with a popover explaining why it's greyed out)

- If paper is older than 2 years from the point of decision.
- If paper has been successfully transferred to another Wiley journal.

Emails

Author

Publisher Logo

Dear Dr. John Smith,

Your manuscript titled "Test Study of Editorial Matters" submitted to Journal of Editorial Studies has been returned to the peer review process following a previous reject decision.

We will be in touch with updates, including revision requests or further decisions regarding the manuscript.

If you have any concerns or questions, please contact the editorial office immediately.

Kind regards,
Journal of Editorial Studies

All Editors

Publisher Logo

Dear Dr. John Smith,

The manuscript titled "Test Study of Editorial Matters" has been returned to the peer review process following agreement to rescind a previous reject decision.

If you have any questions, please contact the editorial office.

Kind regards,
Journal of Editorial Studies

EA

Publisher Logo

Dear Dr. John Smith,

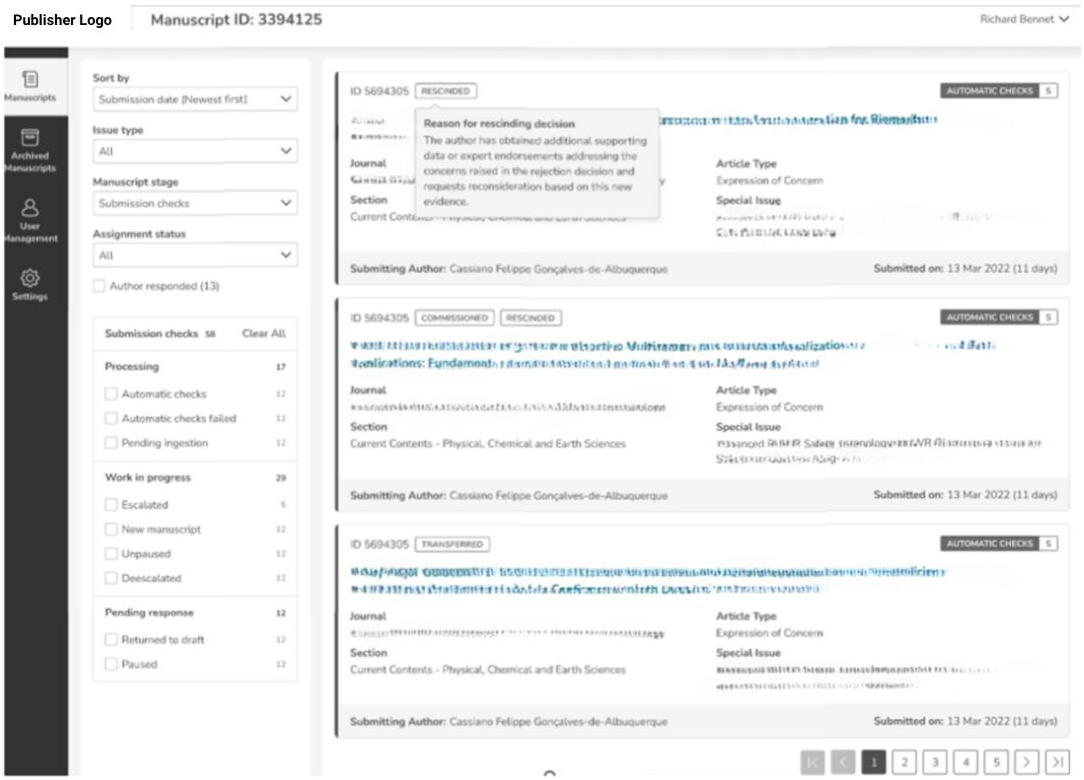
The manuscript "Test Study of Editorial Matters" has been returned to the peer review process following agreement to rescind a previous reject decision.

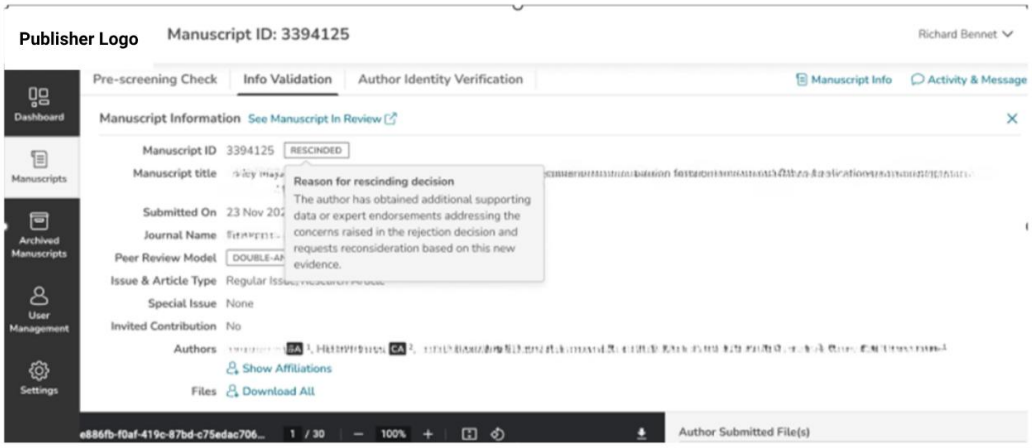
The same members of the Editorial Team have been reassigned to the manuscript, with you as the Editorial Assistant. If reassignment of this manuscript to alternate members of the editorial team is required, please visit the Manuscript Details page.

MANUSCRIPT DETAILS

Kind regards,
Journal of Editorial Studies

Screening





In Activity & Messages, added with “Rescinded” icon

Activity & Messages

Quality checker: [illegible] 10 Oct 2024

Action: Approve Manuscript

Manuscript version: 2

Manuscript Rescinded 21 Oct 2024

Action: Rescinded (Peer Review)

Manuscript version: 1

Reason for rescinding decision

The author has obtained additional supporting data or expert endorsements addressing the concerns raised in the rejection decision and requests reconsideration based on this new evidence.

Submission checker: [illegible] 02 Oct 2024

Action: Refuse to Consider (RC)

Manuscript version: 1

Refusal reasons

Quality concerns

Article type not accepted; Incomplete submission; Sanctioned author(s) and/or their affiliated institution(s);

Other quality concerns: Editor mishandling; Suspicious turnaround times.

Integrity concerns

Other ethical concerns: Editor mishandling; Suspicious turnaround times.

Other research concerns: Editor mishandling; Suspicious turnaround times.

Peer review misconduct

Suspicious review activity; Suspicious turnaround times;

Other peer review misconduct concerns: Editor mishandling; Suspicious turnaround times.

Additional comments to the author

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

Quality checker: [illegible] 02 Oct 2024

Action: Pause Manuscript

Manuscript version: 1

Submission checker: [illegible] 23 Aug 2024

Action: Approve Manuscript

Manuscript version: 1

Comment for editors

No comments.

Comments for publishers

Our system has detected that the profile on phenom for author [Brant G. Wang] does not match the name listed on their linked ORCID profile. Please can this be flagged to authors when the paper is returned for revisions? Please do not hesitate to contact me if you need any further details.

Manuscript Statuses for Rescind Rejection

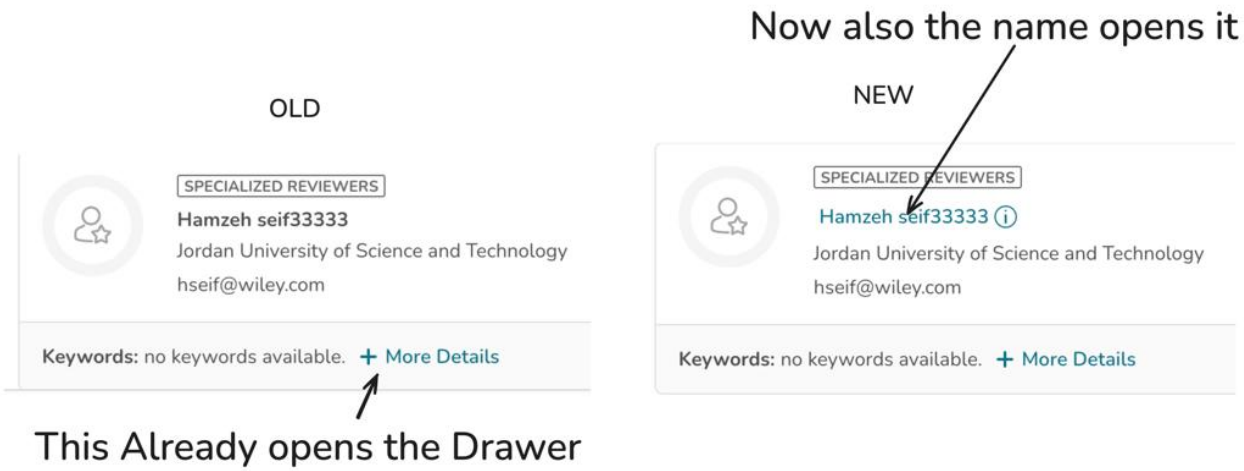
Status of Manuscript Before Rejection	Status in Research Exchange	Once rejection rescinded, open to:
Invitation Pending	reviewersinvited	Invite Reviewers (AKA "academicEditorAssigned")
Under Review	underReview	Invite Reviewers
Revision Requested	revisionRequested (before author submits revision)	Invite Reviewers
Pending Approval	pendingApproval	Invite Reviewers
Accepted	qualityChecksRequested, qualityChecksSubmitted	Invite Reviewers
Assign AE	Submitted	Invite Reviewers
Make Decision	makeDecision	Make Decision
Make Recommendation	reviewCompleted	Make Recommendation

If the manuscript was in any status past the point of Review and into QC, such as inQA (meaning it got approved and went to QC), then reopen to makeDecision / reviewComplete or academicEditorAssigned, depending on its last prior status (see above)

July-2026 User Interface Update - Open Reviewer Drawer by Clicking on Specialized Reviewer name

Available from	21-July-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors handling peer review

From the reviewer card, you can now open the reviewer drawer by clicking on the name of the specialized reviewer. Previously, you could only open the drawer by clicking "More details".



July-2026: Activity Log Visibility Extended to Guest Editors and Lead Guest Editors

Available from	21-July-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Guest Editors and Lead Guest Editors
Overview	Users in the Guest Editor and Lead Guest Editor roles now have visibility into the Activity Log for manuscripts associated with the Special Issues they manage.This extends the existing visibility that Triage and Handling Editors have over the Activity Log for Regular Issue manuscripts, ensuring a consistent user experience for manuscript-level visibility across roles. This will be immediately visible on all manuscripts regardless of stage / date of submission in relation to the feature enablement.

Activity Log in the Review Module

The Activity Log is a built-in audit and communications trail in Research Exchange Review, accessible from the Article Details page of any manuscript. It provides a comprehensive, chronological record of all actions, decisions, and emails that have occurred during a manuscript's peer review lifecycle.

What it shows

- Who performed each action

- The date and time of every event
- Whether the entry was an email (marked with an email icon)
- Entries organized by manuscript version

The Activity Log updates automatically based on system actions — users cannot manually edit it.

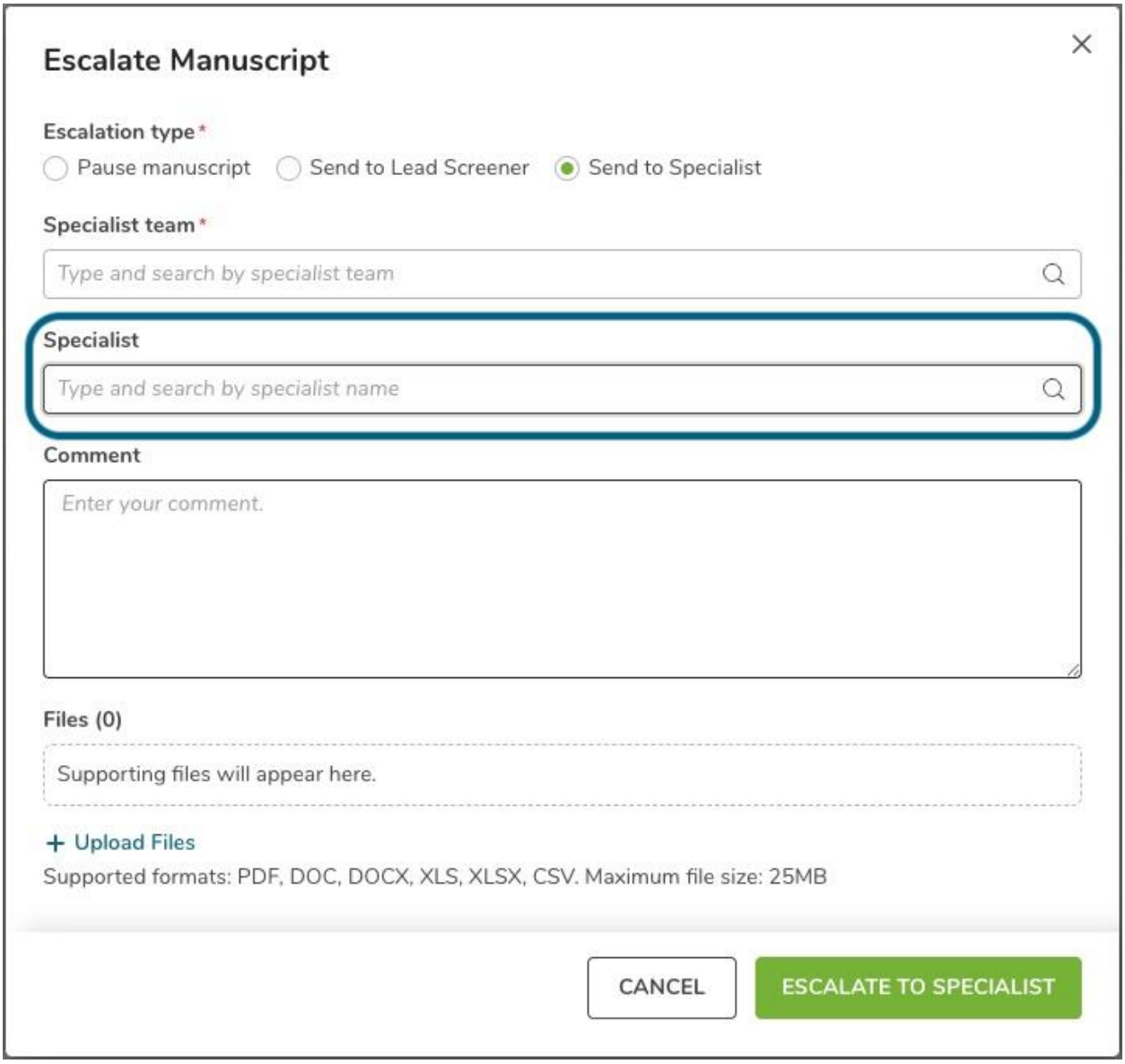
July-2026 Allow Checkers to select a Specialist when escalating papers in screening

Available from	17-July-2026
Impacted Module	Research Exchange **Screening**
Impacted Roles	Checkers
Overview	Checkers can now optionally select an individual Specialist when escalating a paper to a Specialist team, bringing their escalation flow in line with the existing Lead Screener experience.

Key Features

- When a Checker escalates a paper (Escalate → Send to Specialist), they can now optionally choose a specific Specialist within the selected team, in addition to the required team selection.
- The Specialist selection step now behaves identically for Checkers and Lead Screeners.
- If a Specialist is selected, the paper is escalated directly to that individual. If no Specialist is selected, the paper is escalated using the existing assignation algorithm — no change to that fallback behavior.
- The Specialist team dropdown remains mandatory with no change to existing behavior.
- Once a Specialist team is selected, a new Specialist dropdown is populated with members of that team.

- Selecting a Specialist from this dropdown is optional; Checkers can proceed with escalation without choosing one.



July-2026: Reviewer Queue User Feedback Improvements

Available from	7-July-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors handling peer review

Overview	Two improvements have been made to the functioning of the Reviewer Queue based on user feedback. Reviewer workload data is displayed on the queued reviewer cards as well. Accepted invitations transitioning to status 'Overdue' are no longer triggering automatic invitations.

Key Features

- Reviewer workload data is now displayed on the queued reviewer cards

Reviewer workload data was previously shown only on reviewer cards in the Search and Suggestion tabs of the Reviewer Invitation space, before a reviewer was invited or added to the queue. It was not visible on cards in the Invitation Log, under either Invited Reviewers or Queued Reviewers. With this release, workload data is now also displayed on Queued Reviewers cards.

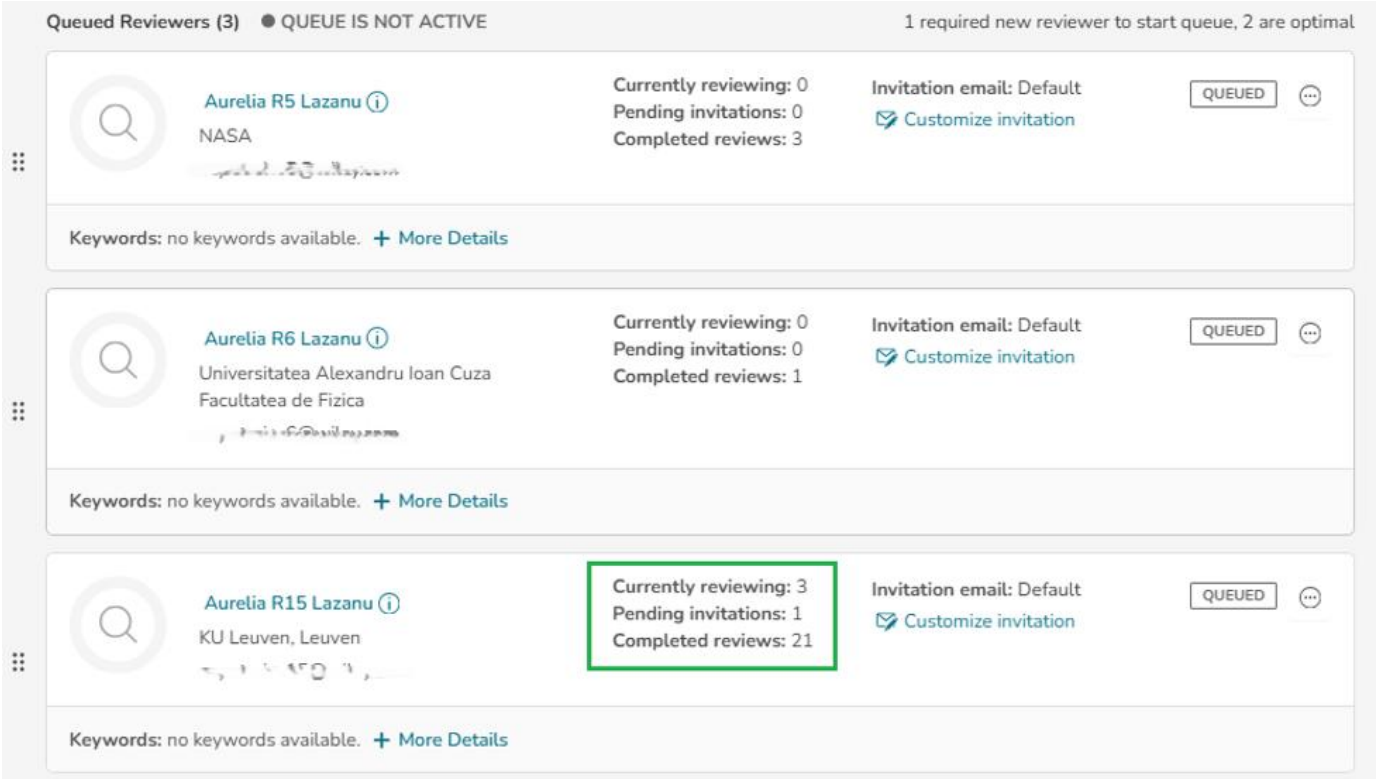
Why does this matter?

The workload indicators – Currently Reviewing and Pending Invitations – help editors identify reviewers who, while suitable, may be unlikely to accept an invitation due to high current workload.

This information is particularly valuable for queued reviewers. Since the queue progresses over an extended period based on system rules, a reviewer's workload at the time of queuing may differ significantly from their workload when they are eventually invited. Displaying this data allows editors to order the queue more effectively – prioritizing reviewers with lower workload while retaining high-workload reviewers further down the queue for when their availability may have improved.

User Interface Updates

-Reviewer workload data is displayed on the 'Queued Reviewers' cards in the 'Invitation Log'



- Accepted invitations transitioning to ‘Overdue’ status no longer trigger automatic invitations

Previously, the system re-evaluated the queue status and automatically invited the next reviewer in the queue if needed when any of the following events occurred:

- An invitation is declined
- An invitation receives no response within 7 days (considered inactive within the queue logic, though not expired)
- An invitation is revoked by the editor
- The editor updates the notification preference on the required number of reviews before making a decision on the manuscript
- An accepted invitation transitions to 'Overdue' status (review deadline passed)

With this release, the last event – an accepted invitation transitioning to 'Overdue' – no longer triggers a queue re-evaluation and a subsequent automatic invitation. Instead, editors are notified by email when an accepted invitation becomes overdue and retain full control over whether and when to invite the next reviewer in the queue.

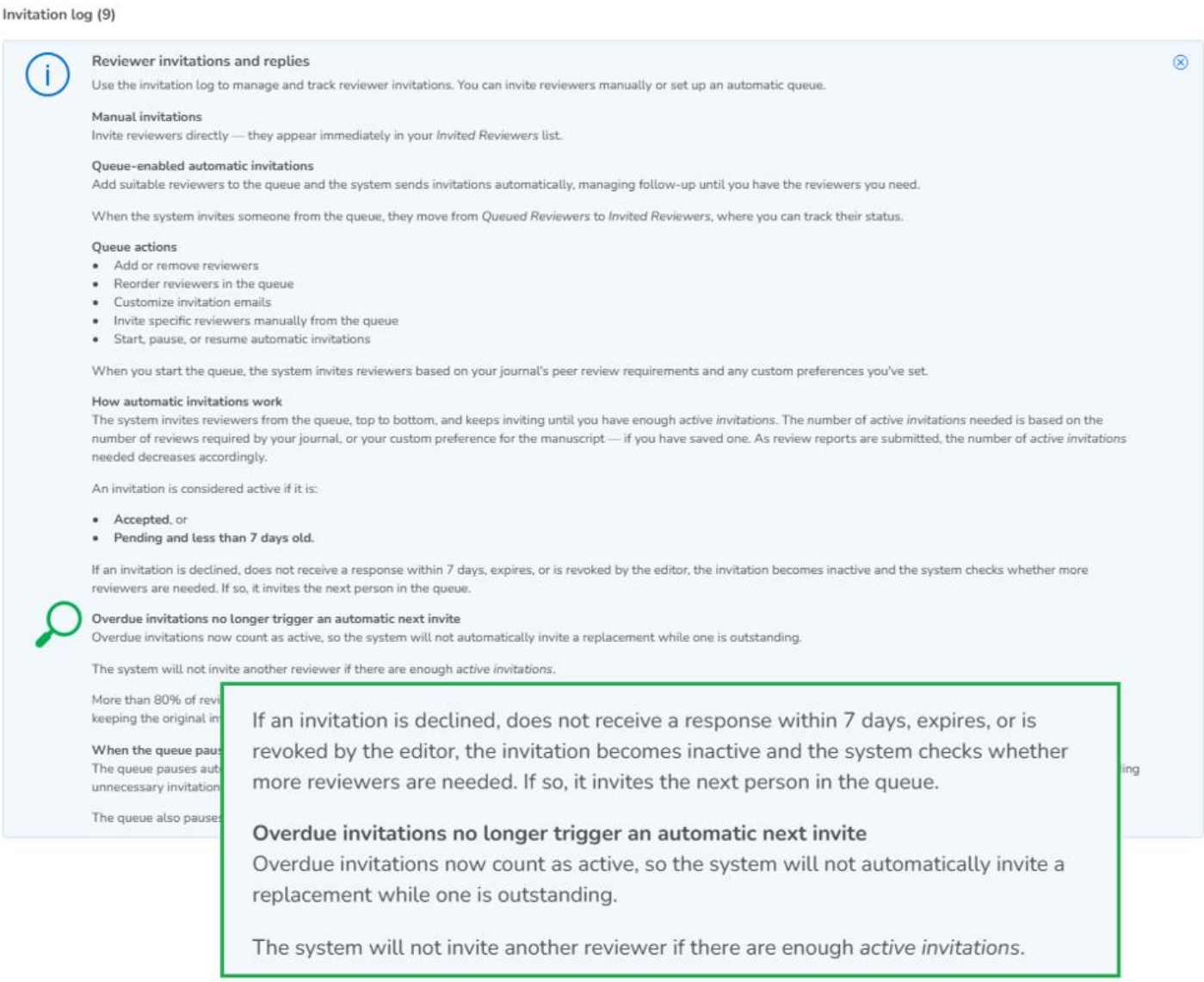
Why does this matter?

In most cases, overdue reviewers submit their review shortly after the overdue notification. Under the previous behavior, the system would automatically invite the next queued reviewer at the point of the deadline being passed, should the number of active invitations be below the needed threshold – before it was clear whether the overdue reviewer would still submit. This created two undesirable outcomes for editors ready to make a decision on the manuscript: either waiting for the newly invited reviewer to respond and potentially submit a report, increasing manuscript turnaround time, or revoking the new invitation, which negatively impacts the experience of the invited reviewer. By removing this trigger, the system avoids unnecessary invitations and gives editors the context and control to act based on the actual situation.

User Interface Updates

While this is an automated process with no changes in the UI for the feature, the instructions on the Reviewer Queue were updated to reflect the change.

-Section of the Reviewer Queue instructions updated to state that transitioning to status 'overdue' is no longer triggering an automatic invitation



June-2026: Reviewers can opt out from reviewer invitations at journal level - Phase 1

Available from	30-June-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Reviewers (all publisher tenants on the Research Exchange platform)

Overview	Currently, the only option for reviewers to unsubscribe from review invitations is an all or none solution stopping invitations from all the journals operating on the Research Exchange platform, regardless of publisher. Users may choose this option from their Review User Profile, but this requires the reviewer to have an account in Review and to log in to update this choice. This release enables reviewers receiving invitations to review manuscripts to opt out of future invitations from a specific journal, directly from the invitation email – without needing to create an account or log in to the application.

Key Features

For Reviewers

A new line has been added to all reviewer invitation email templates: "To opt out of future invitations to review manuscripts for this journal, click here."

- Clicking the link opens an ‘opt out’ page where the reviewer can confirm their preference for that journal and that email address only.
- Upon opting out, a confirmation page is displayed, and all pending invitations from that journal are automatically declined. Accepted invitations already in progress are not impacted.
- Reviewers can opt back in at any time by using the same URL from the original invitation email.
- No account creation or login is required to manage this preference.

Email templates updated include:

- Invitation to review a manuscript (single anonymous & double anonymous peer review models)
- Re-invitation to review a revised manuscript (single anonymous & double anonymous peer review models)

- First, second, and third reminders to review a manuscript (single anonymous & double anonymous peer review models)

For Editors (no change in Phase 1)

Reviewer cards in the Reviewer Invitation space (e.g., suggestions, search results) display a "Review Opt-Out" tag in red for reviewers who have opted out:

- from a particular journal using the new feature
- from all journals in the platform based on the 'all or none' unsubscribe option prior to this feature

Editors can still send an in-app invitation to an opted-out reviewer

- A warning modal will inform the editor that the reviewer has opted out and will not receive an email notification.

- If the editor proceeds, the invitation is recorded in the system. The reviewer will not receive an email but can see and respond to the invitation if they log into the application.

Important Limitations in Phase 1

- The opt-out preference is saved per journal – it applies solely to the journal that sent the invitation

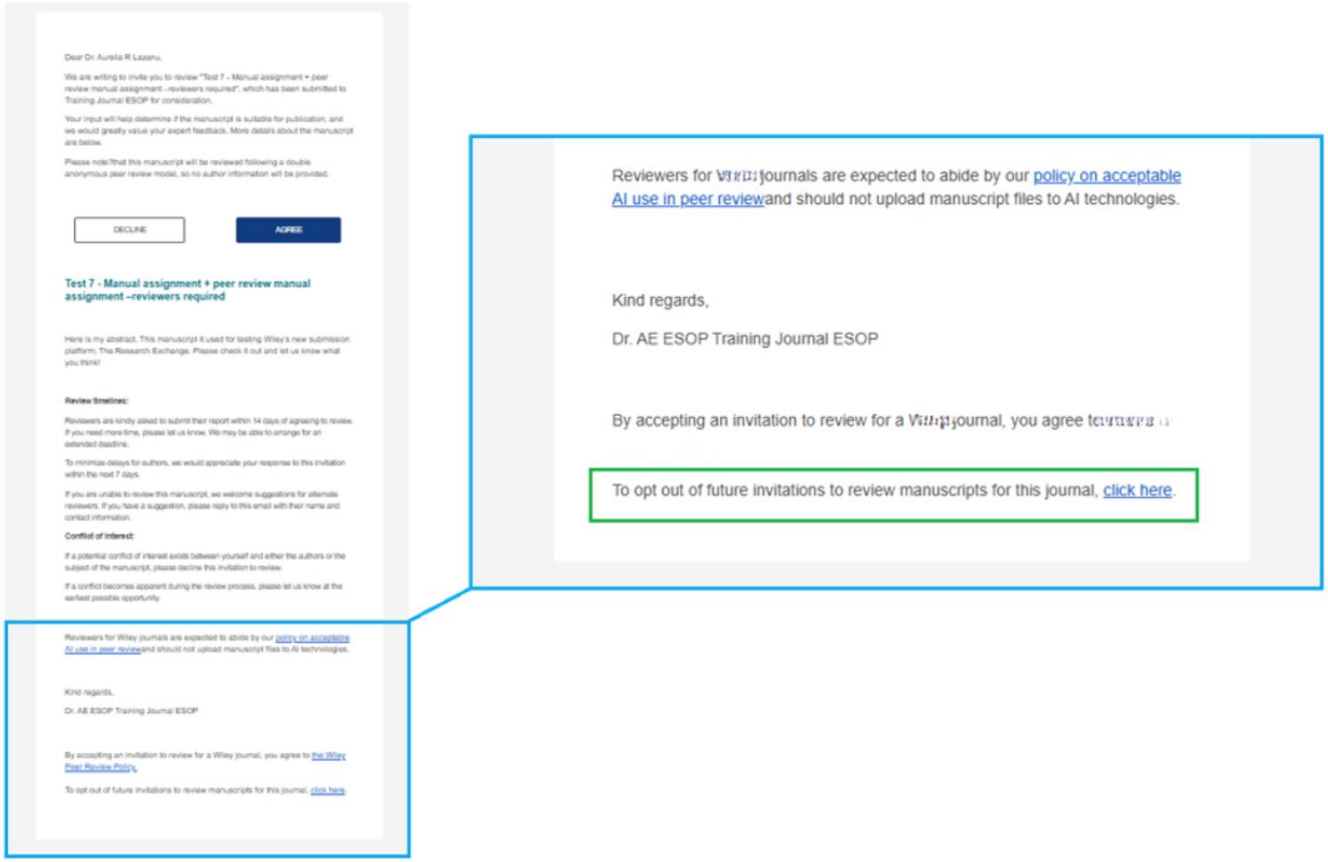
- The opt-out preference is saved per the email address that received the invitation – the reviewer cannot save a preference for other email addresses that they may have

- Reviewers cannot yet manage preferences across multiple journals in a single place. This capability is planned for Phase 2.

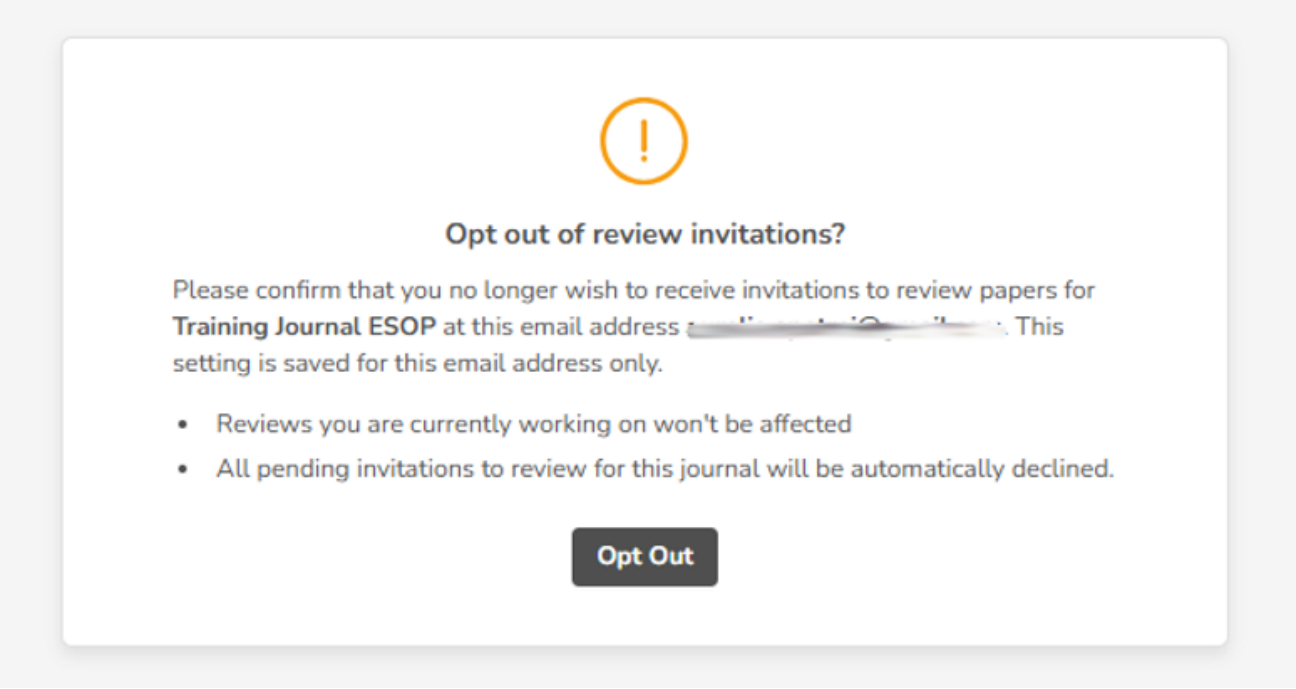
- Invitation emails are blocked for opted-out reviewers, but in-app invitations are still permitted by editors in Phase 1.

User Interface Updates

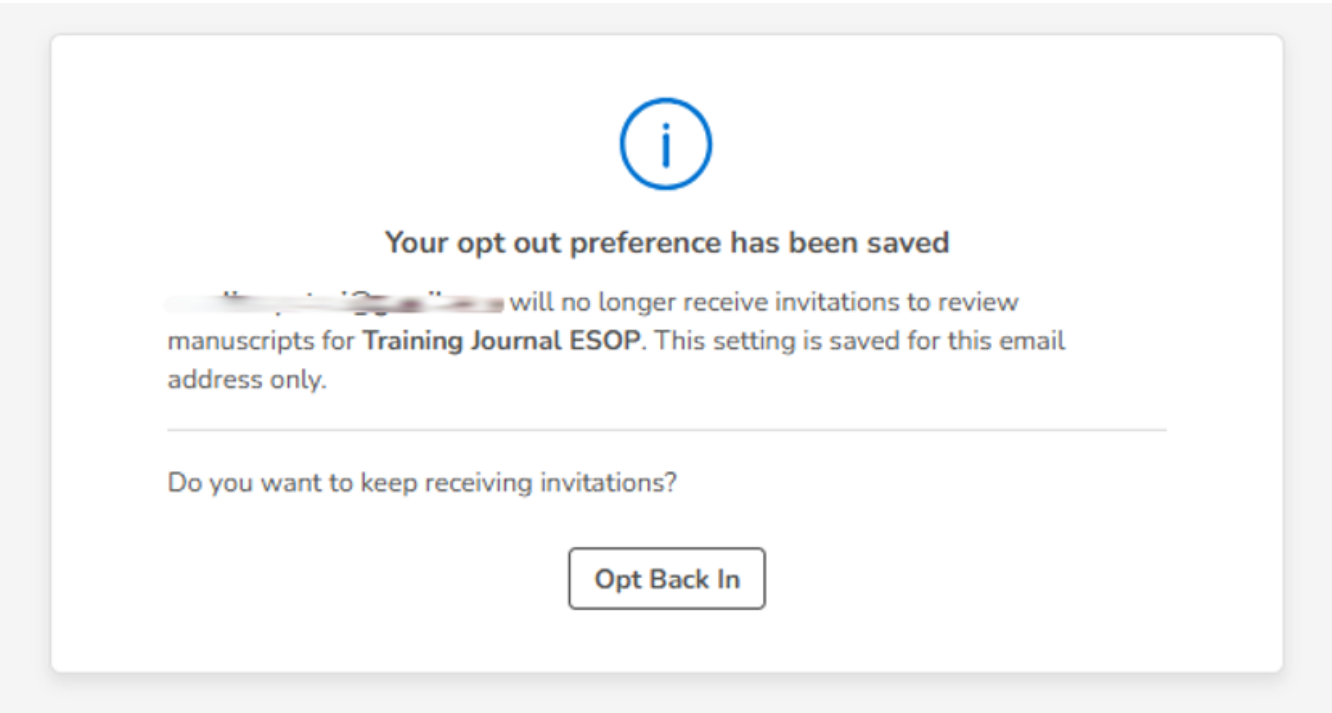
-Invitation to review a manuscript sample email illustrating the new text added as an entry point for the new feature: "To opt out of future invitations to review manuscripts for this journal, click here."



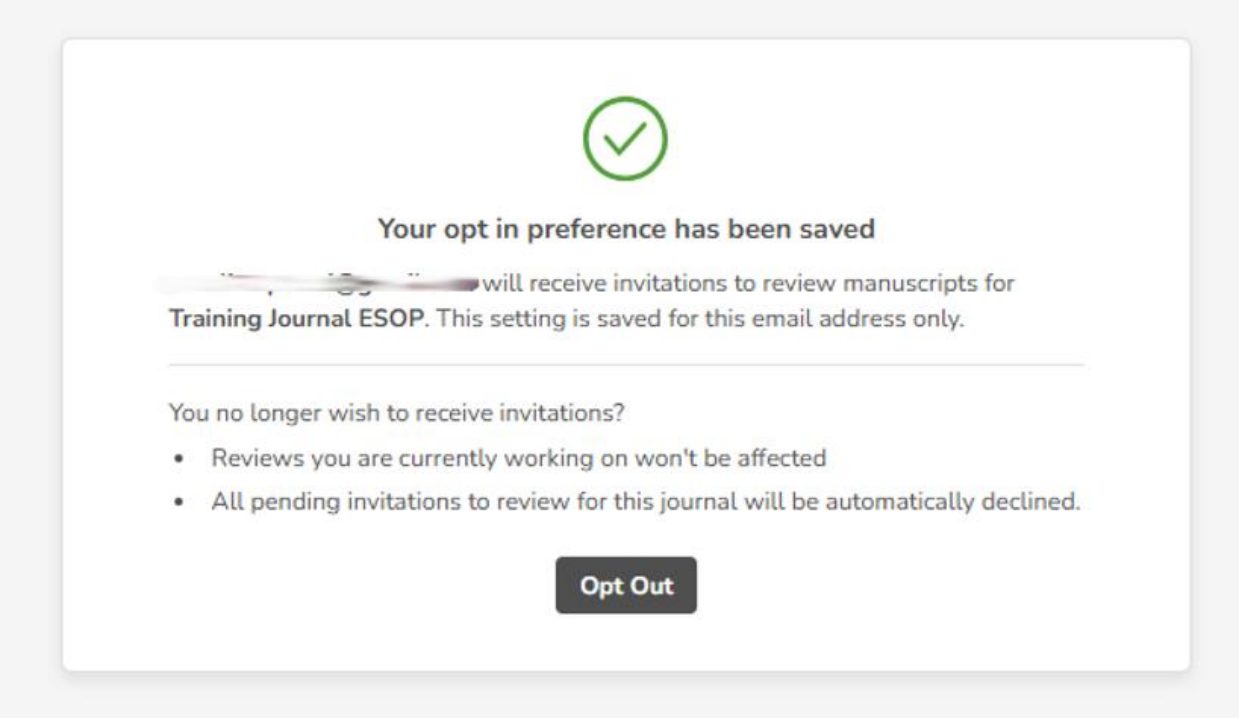
-The warning modal on the 'opt out' management page opened by accessing the URL in the invitation email or reminder.



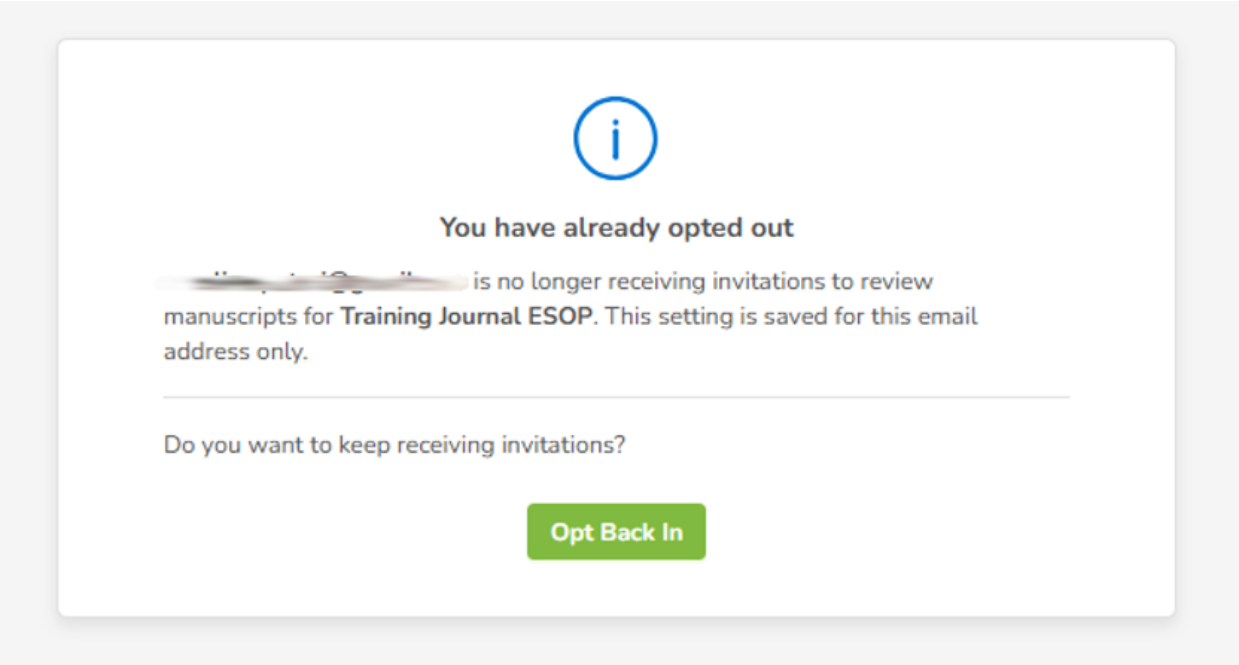
- The confirmation modal on the 'opt out' management page when the opt-out preference is successfully saved, displaying the possibility to change the preference and opt back in.



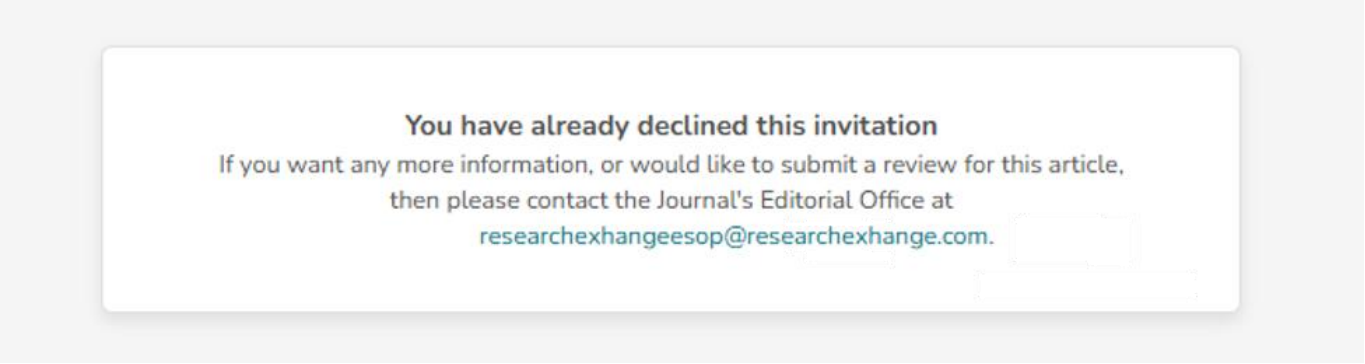
- The confirmation modal on the 'opt out' management page when the preference is changed and the reviewer opts back in, displaying the possibility to change the preference and opt out.



- The confirmation modal on the 'opt out' management page when the reviewer accesses the URL in an invitation email or reminder, after they have already saved the opt-out preference for that journal. Modal displays the possibility to change the preference and opt back in.



-The page displayed if the reviewer attempts to respond to an invitation after they have already saved the opt-out preference for that journal and the respective invitation was automatically declined. This is the page displayed in the general scenario where the reviewer attempts to respond again to an invitation that was already declined.



June-2026: Email Notification Management (Editors)

Available from	25-June-2026
Impacted Module	Research Exchange **Review, Screening**
Impacted Roles	All Editor roles

Overview	Editors can now manage their email notification settings directly from their Review profile. This feature was introduced in response to consistent editor feedback that high volumes of system-generated emails are difficult to manage Editors can enable or disable individual optional email notification types at any time. Essential notifications remain always-on and cannot be disabled to ensure editors are informed of key workflow events or actions. All preferences are saved per user and applied to future notifications only.

Key Features

Email Notification Settings in Review Profile A new "Notification Settings" section is now available in each editor's Review profile Account Settings. From this section, editors can view all email notification types organized by category and toggle individual notifications on or off.

Email types are grouped by category

- Invitations & Assignments
- Responses to invitations
- Review process
- Make decision or recommendation
- Task notifications
- Confirmation emails
  - Each email type includes an on/off checkbox. Checkboxes are disabled for essential notifications
    - All notifications are enabled by default

- All optional email notifications now include a footer link directing editors to their Email Notifications profile page. Editors can use this link to quickly access and update their preferences. This footer link is excluded from required email notifications.

- To restore receipt of notifications for emails currently checked “off”, Editors must reenter their ""Notification Settings” section via the Review profile Account Settings and check “on”. Notifications will then resume upon next applicable email triggering event.

- Saved preferences are applied to all future qualifying events, on all journals for which the user holds an editorial role. Changes do not affect emails that have already been sent.

User Interface Updates

- New Email Notifications section added to the Review user profile Account Settings

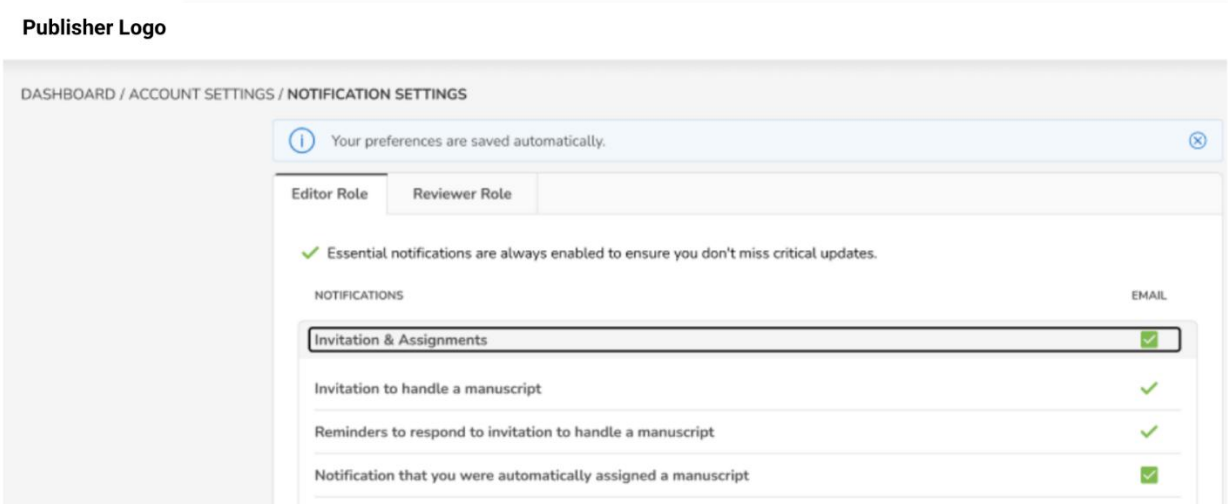
- Display by email category and notification type, separated by editor and reviewer role tabs

- Toggle controls (on/off) displayed adjacent to each configurable email type

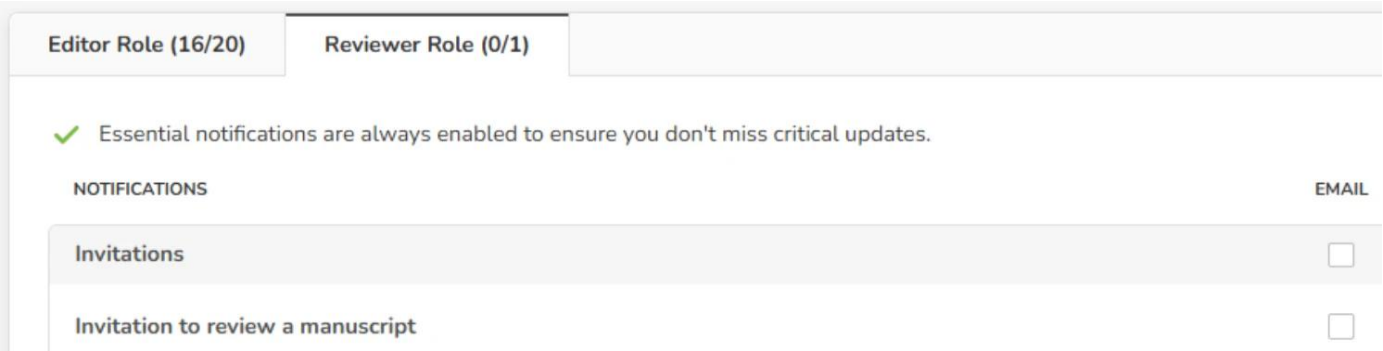
- Required email types are visually indicated (e.g., grayed out, locked icon, or "Required" label) and are non-interactive

- Toggle changes will take effect immediately on any new email notifications
  Footer link added to all optional email templates, linking to the Email Notifications profile page

Editor Tab



Reviewer Tab



List of Notification Settings Available for Editors

Category: Invitations & Assignments

Email Notification	Available Action
Invitations to handle a manuscript	None
Reminders to respond to invitation to handle a manuscript	None
Notification that you were automatically assigned a manuscript	Toggle on/off

Confirmation that you accepted the handling editor assignment	Toggle on/off
Reminders to invite reviewers *Reminders are sent X and X days after a manuscript is assigned.*	Toggle on/off

Category: Responses to invitation

Email Notification	Available Action
An editor declined to handle a manuscript or the editor invitation expired *You may need to invite another editor to handle the manuscript.*	Toggle on/off
A reviewer agreed to handle a manuscript	Toggle on/off
A reviewer declined to handle a manuscript or the reviewer invitation expired *You may need to invite additional reviewers.*	Toggle on/off

Category: Review process

Email Notification	Available Action
A reviewer report has been submitted	Toggle on/off
A reviewer report is overdue	Toggle on/off

Category: Make decision or recommendation

Email Notification	Available Action
Manuscript is ready for decision or recommendation	None

A manuscript you are handling has met your specified requirements for notification and/or the minimum journal requirements for making a decision or recommendation.	
Reminders that a manuscript is ready for decision or recommendation *These reminders are sent when a manuscript you are handling has met the minimum requirements for making a decision.*	Toggle on/off

Category: Task notifications

Email Notification	Available Action
New comment tags	None
Authors have returned a revised version of a manuscript you handled	Toggle on/off
A 'reject' decision' has been rescinded on a manuscript you handled *A manuscript you handled has been re-opened, likely following an author's appeal. Action may be needed.*	Toggle on/off
A senior editor has returned your recommendation with comments	Toggle on/off

Category: Confirmation emails

Email Notification	Available Action

Email Notification	Available Action
Confirmation of final decision on a manuscript you handled	Toggle on/off

Confirmation of the decision to publish or reject.	
A manuscript assigned to you has been withdrawn	Toggle on/off
You have been removed from an editorial role on a manuscript	Toggle on/off
New comments and replies to manuscripts	Toggle on/off

Category: Invitations

Email Notification	Available Action
Invitations to handle a manuscript	Toggle on/off

Note: If toggled off and the Editor is invited to review a manuscript, they will not receive the email notification; it will appear in their dashboard (Focus>Review) to action. *Risk: If the Editor toggles off this notification before receiving at least invitation to review with that account (thus activating their Review role in the dashboard), they will not see the notification in the dashboard.*

June-2026: Search for Manuscript by Author Email

Available from	14-June-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	All Editors
Overview	The Dashboard has been enhanced to allow all Editors to search for manuscripts using an Author's email address. This feature aligns the Editor experience with existing capabilities available to Full Access Editors (FAEs), Editorial Assistants (EAs), and Journal Managers (JMs), improving efficiency and consistency across roles.

Key Features
All editors can now query manuscripts by entering an author's email address.

Editors will only see manuscripts within their permission scope and filtered view

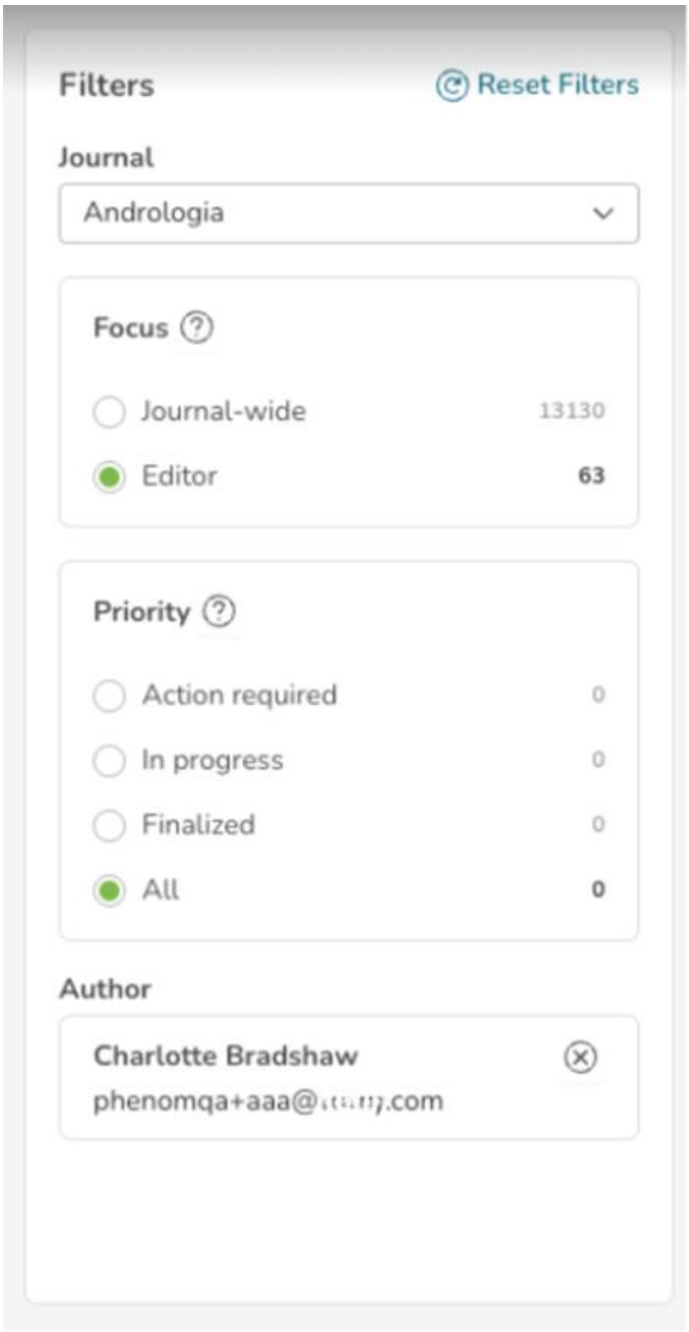
A valid email address is required to begin the query – i.e. searching for 'john@smith' will prompt the user to enter a valid email address, whereas 'john@smith.com' will begin the query

The feature mirrors the existing author email search behavior used by FAEs, EAs, and JMs.

User Interface Updates

-Added the Author Email search filter to the Editor Dashboard

-Author and email address will appear as applied filter



June-2026: Ensure that Review accurately reflects change in editorial roles at the manuscript level

Available from	12-June-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	All Editor roles

Overview	Previously, editorial roles were dynamically sourced from the editorial board, causing historical records (e.g., audit logs and editorial comments) to reflect updated roles rather than the roles held at the time of the action. With this enhancement, the system now records the editorial role at the time of each action, ensuring historical accuracy and consistency even if editorial role holders on the journal are later modified.

Key Features

- Editorial roles are now stored at the time of each action (e.g., assignment, recommendation, decision).
    - Prevents retroactive changes to historical records when editorial roles are renamed or reassigned.
- Audit log entries retain the original role held by the editor at the time the action was taken.
    - Eliminates inconsistencies where past entries were overwritten with the latest role.
- Editorial comment labels now reflect the role associated with the editor at the time the comment was made.
    - Prevents earlier comments from being relabeled after role changes.
    - Maintains a reliable historical record of editorial decisions and responsibilities.
    - Supports auditability and transparency across manuscript workflows.

User Interface Updates

No visual changes to layout, but improved data accuracy.

Editorial Comments

Role labels displayed on comments are fixed at creation and no longer dynamically updated.

Ensures consistent labeling across the manuscript lifecycle.

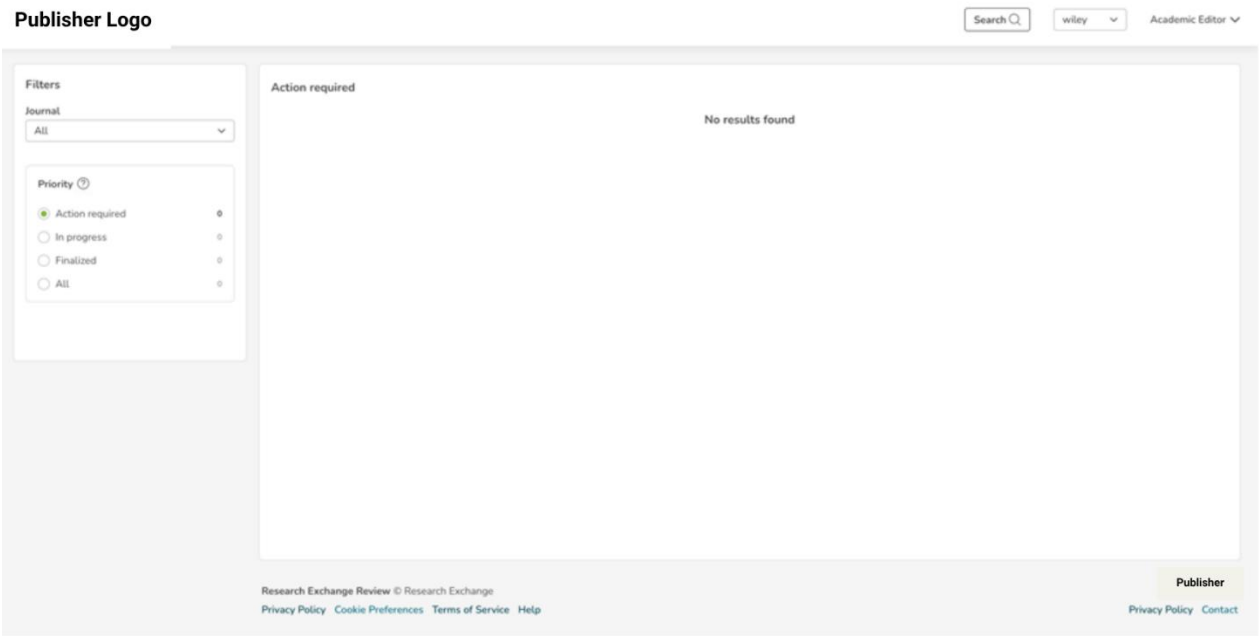
June-2026: New Footer for the Research Exchange Platform

Available from	8-June-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	All users
Overview	The page footer in Research Exchange Review has been updated to include platform-level information alongside the existing publisher links. The footer now displays two distinct sections: platform information on the left, and your publisher-specific links on the right.

What Is Changing

Previously, the footer contained only publisher-specific links (Privacy Policy, Terms of Service, Support contact, and Cookie Preferences), presented as a single row centered across the page.

-The updated footer introduces a two-column layout



Left side – Platform information: displays the product and platform name and copyright notice, along with links to the platform's Privacy Policy, Cookie Preferences, Terms of Service, and Help

Right side – Publisher information: displays your publisher name and your own Privacy Policy and Customer Support Contact links, as before.

No existing publisher links have been removed. The support email previously shown inline has moved to your publisher's Contact link.

May-2026: Overdue reviewers should be informed that their report is no longer needed

Available from	22-May-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Reviewers
Overview	Previously, overdue reviewers were correctly removed from obligations but were not notified during accept/reject decisions. This update fixes the gap in reviewer notifications when an editorial decision of accept or reject is made. Overdue reviewers are now correctly informed when their report is no longer required, aligning system behavior with reviewer communication policy.

Key Features

Ensures all reviewers who accepted an invitation but did not submit a report—including overdue reviewers—receive a “your report is no longer needed” notification when a manuscript is accepted or rejected.

This brings notification behavior for accept/reject decisions in line with existing policy and with the already-correct behavior seen in revision decisions, where all reviewer states (accepted, pending, overdue) are notified.

May-2026: Reviewers should see only those editorial comments that are related to their manuscript activity

Available from	18-May-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Reviewers
Overview	This release introduces a permission-based visibility system for editorial comments within the review workflow. The update ensures that reviewers can only access comments and communications directly related to their assigned manuscript activity, improving confidentiality, clarity, and relevance across editorial interactions.

Key Features

The visibility logic is designed to support future enhancements, including broader ad hoc communication workflows and a generalized comments feature.

- Reviewers will now only see editorial comments related to their specific contributions.
    - Reviewers can only see decisions from cycles they actively contributed to, so a reviewer who did not participate in each cycle will not see that cycle decision.
- Reviewers can view decision emails or comments sent to authors only if they contributed to that specific manuscript action.
    - Ad hoc and QC-stage communications between editors and authors remain excluded from reviewer visibility, as before.
- Newly invited reviewers after a manuscript is returned to peer review will not have access to:
    - Previous editorial comments

    - Prior recommendations or decisions made before their involvement
- Internal editorial recommendations (e.g., an academic editor recommending 'accept' to the triage editor) are no longer visible to reviewers. Only final decisions are shown.
- Private editorial notes (e.g. “Message for editor”) included on decisions are no longer visible to reviewers. Only the public decision content is shown.
- Comment threads are dynamically filtered based on reviewer permissions.

May-2026: As an editor on a 3-tier journal I want to be assigned on subsequent activities when I use "Assign myself to next activity"

Available from	12-May-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors
Overview	Editors on 3-tier journals can now streamline their workflow by pre-assigning themselves to subsequent activities when using **“Assign myself to next activity.”** This enhancement reduces repetitive assignment steps and ensures continuity across activities with similar roles.

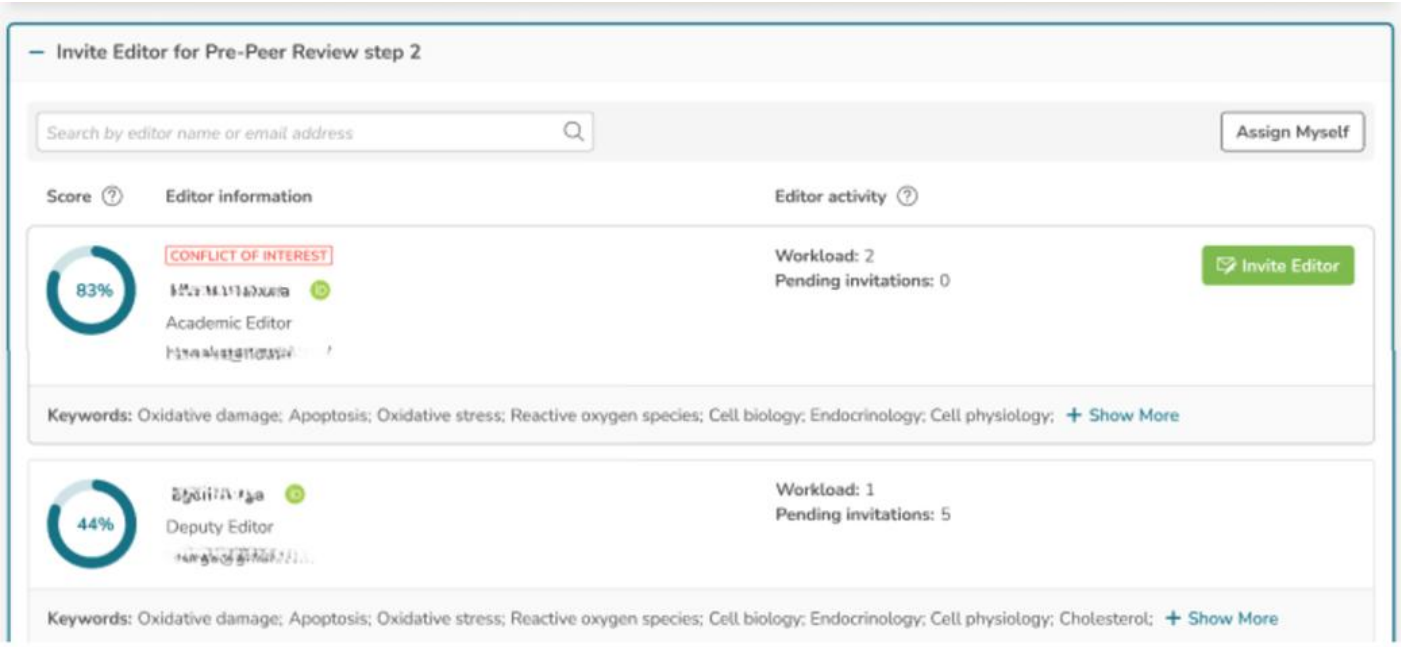
Key Features

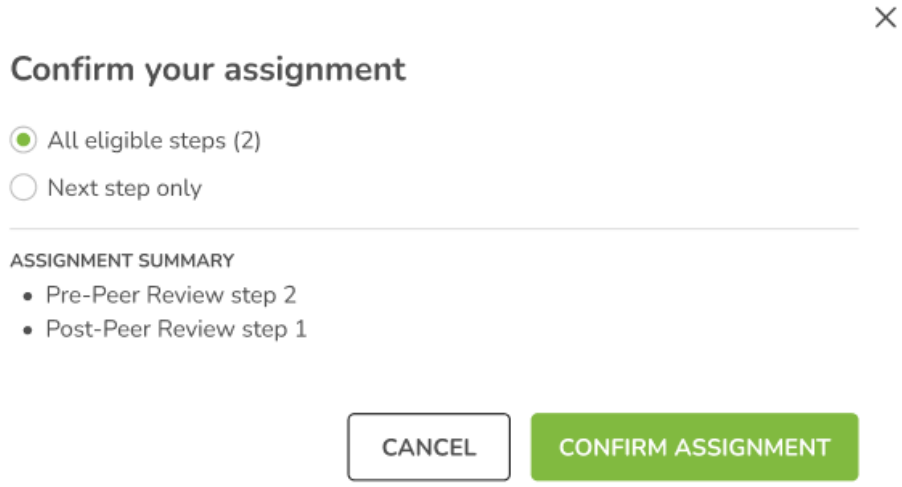
- When an editor on a 3-tier journal selects Assign myself to next activity, the system identifies upcoming activities that share at least one role with the next activity and support automatic assign or invite.
- Editors can choose to assign themselves to:
  - only the immediate next activity, or
  - any combination of eligible future activities, including all.
  - If an editor opts into future activities, they are automatically assigned when the submission reaches each selected step.
    - Pre-assignment will proceed even when the Editor’s Out-of –Office status is on
    - If another editor pre-assigns themselves later, the most recent pre-assignment overrides the previous one.
    - If pre-assigned editor is removed from an activity, they will also be removed from any future activities on the manuscript.

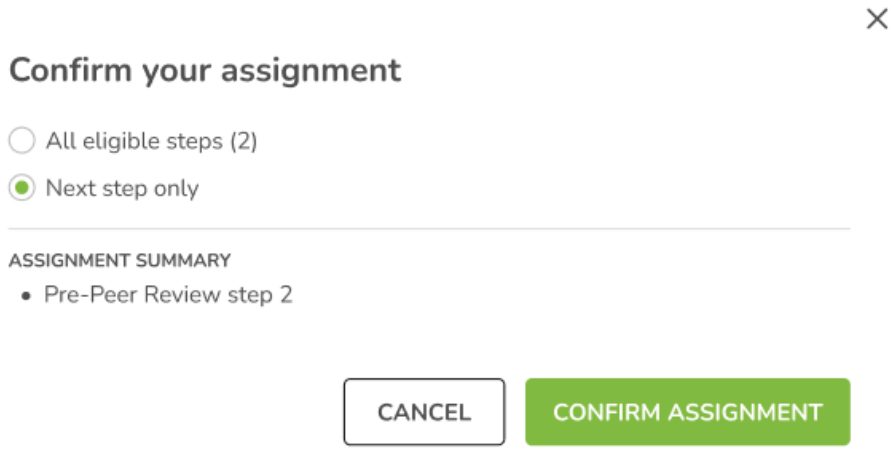
- Pre-assigned editors are carried over through versions of the manuscript.
- All pre-assignment actions are recorded and visible in the activity log for traceability.

User Interface Updates

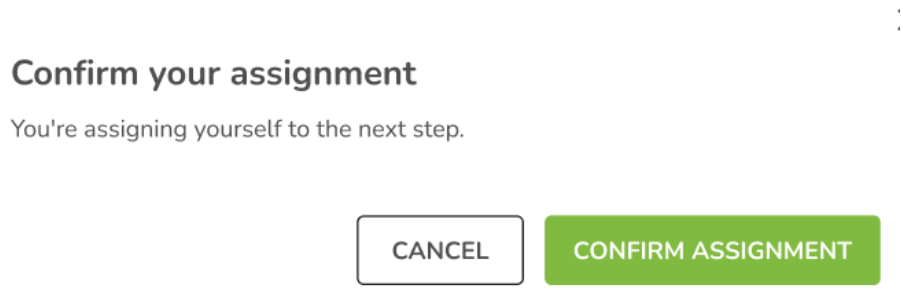
-After choosing Assign myself, editors confirm they will only the current or all eligible future steps.







-Or, where there are no future eligible steps:



May-5-2026: Queue Invited Reviewers

Available from	5-May-2026
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, expires, becomes overdue, or is revoked by the editor, the invitation becomes inactive and the system checks whether more reviewers are needed. If so, it invites the next person in the queue.

The system will not invite another reviewer if there are enough *active invitations.*

The number of *active invitations* needed is based on the number of reviews required by your journal, or your custom preference for the manuscript. As review reports are submitted, the number of *active invitations* needed decreases accordingly.

An invitation is considered *active* if it is:

a. **Accepted**, or

b. **Pending and less than 7 days old**.

When the queue pauses

- The queue pauses automatically when the required number of review reports have been submitted (based on journal requirements or your custom preferences).

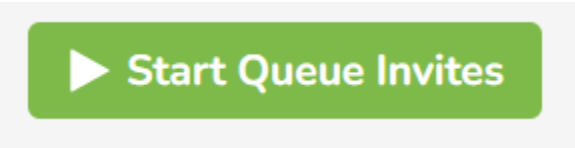
Queue Numbering

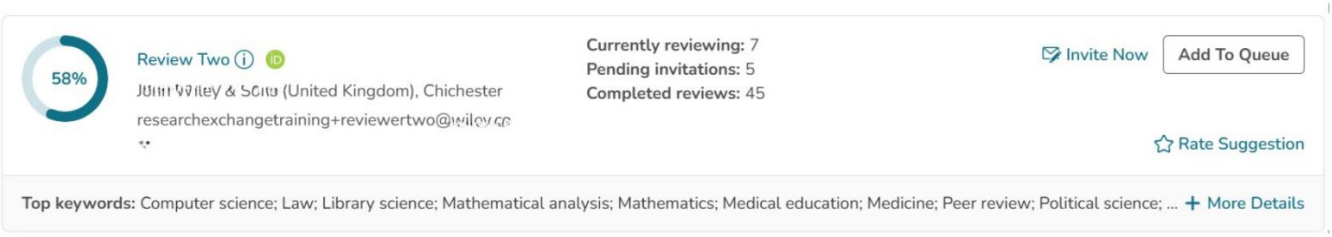
- The queue is numbered, so editors can easily identify the order in which reviewers will be invited.

Re-invite Reviewer Button

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





April-2026: Journal Scope Checker Optimization

Available from	17-April-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors, Editorial Assistants, Admins, Reviewers
Overview	Research Exchange Screening uses a Journal Scope Checker to assess whether a submitted manuscript falls within a journal's stated aims and scope. Before this release: 1. *Scope Check had three main results: In Scope, Moderately In Scope, or Out of Scope* 2. *The check lacked explanatory reasoning* 3. *Journal history was a primary driver for Scope Assessment, comparing new content to*

previously published articles and assessing relevance

With this release, journal Scope Checks have been migrated to a new service. This new version uses an agentic LLM-as-a-jury pipeline to deliver a more accurate, more explainable scope assessment.

For journal scope, the pipeline now runs in two stages.

- First, it checks the manuscript title and abstract against the journal's scope description and aims and scope.
- Then, if the result is ‘Out of Scope’ and similar publications exist in the journal publication history, a second stage checks whether the journal's actual publication history supports or contradicts the overall scope decision. **This is a critical change**: *it catches cases where a journal's stated scope diverges from what it has historically published.*

Scope results are now binary, returning a clean ‘In Scope’ or ‘Out of Scope’ verdict, along with a Publication History Alignment assessment for papers which trigger the second level of checks.

Key Features

Binary scope result

- ‘Moderately In Scope' has been removed. Results are now In Scope or Out of Scope only.

New 'Reason' field

- Every scope result now includes a 2-3 sentence explanation of the decision, always visible regardless of outcome.

Publication history alignment

- When a manuscript is assessed as Out of Scope and similar publications exist in the journal, a secondary LLM review runs against the journal's publication history. The result ('supports' or 'contradicts') is stored for reporting purposes, and displayed to users when both the manuscript is Out of Scope *and* publication history contradicts the primary decision.

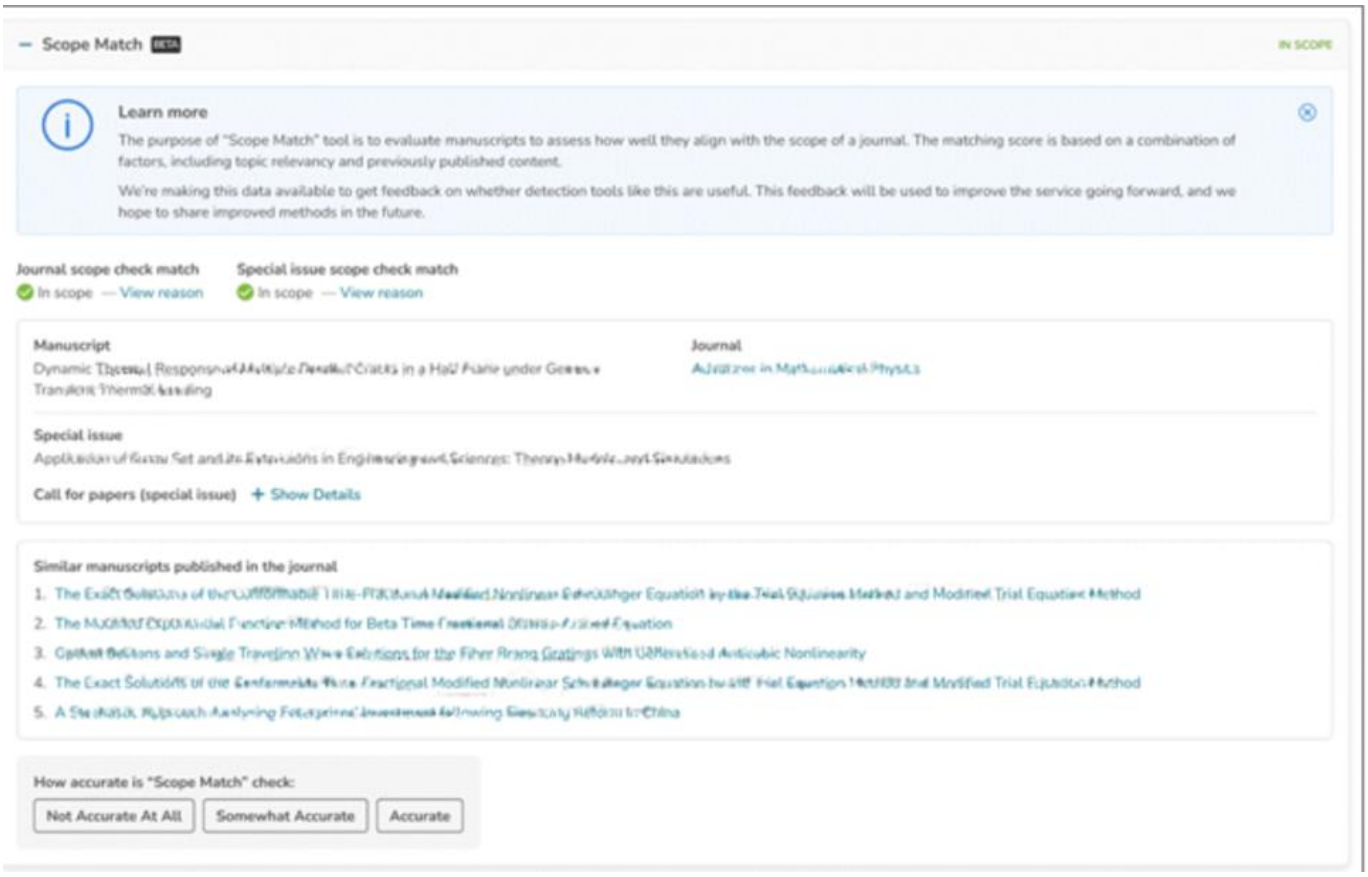
Publication history note

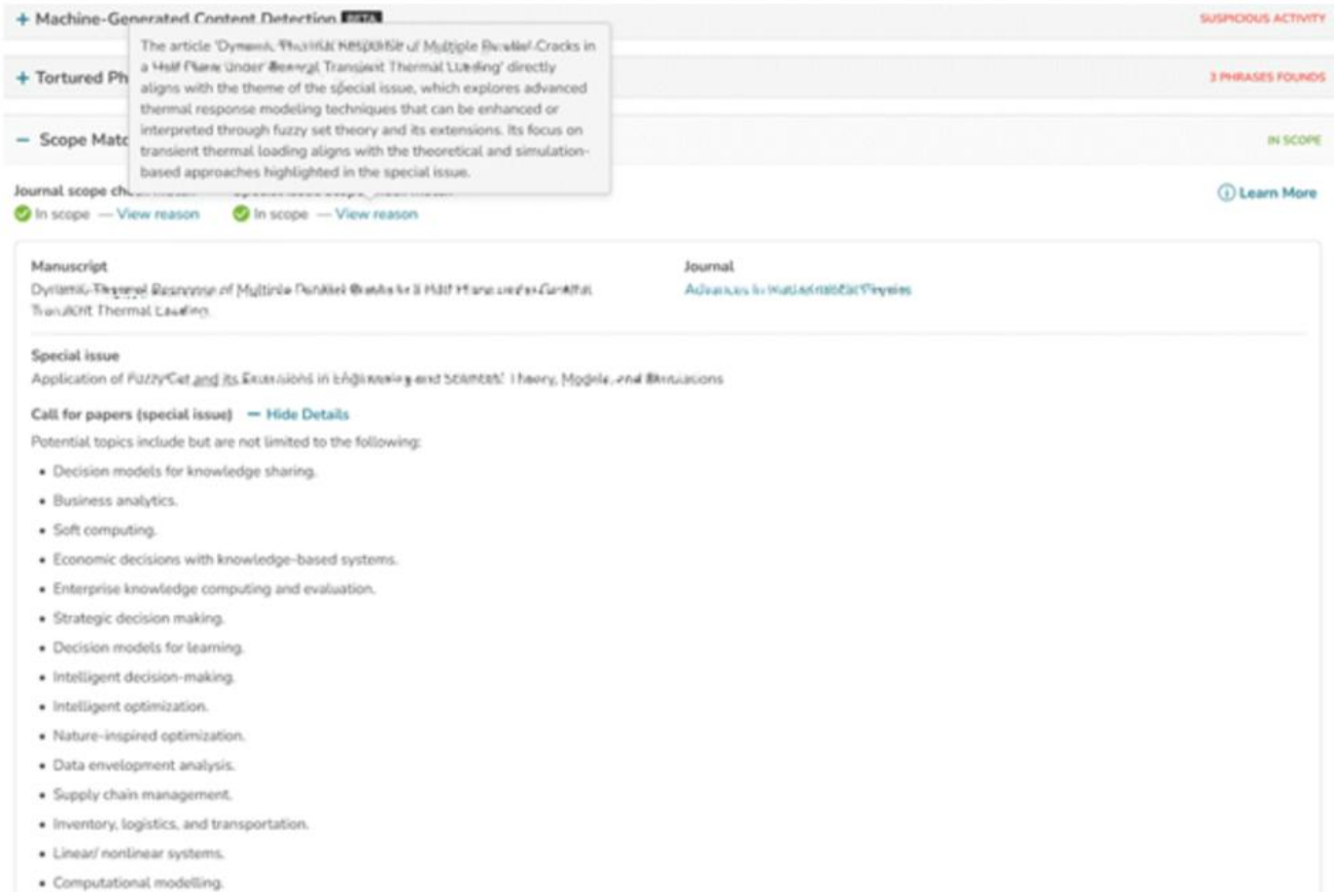
- For papers that trigger the alignment question, a contextual note is displayed, explaining what the journal's historical publications suggest about the submission.
- Screening reports updated
- All new response fields are displayed in both inline Review reports and HTML Screening reports.

User Interface Updates

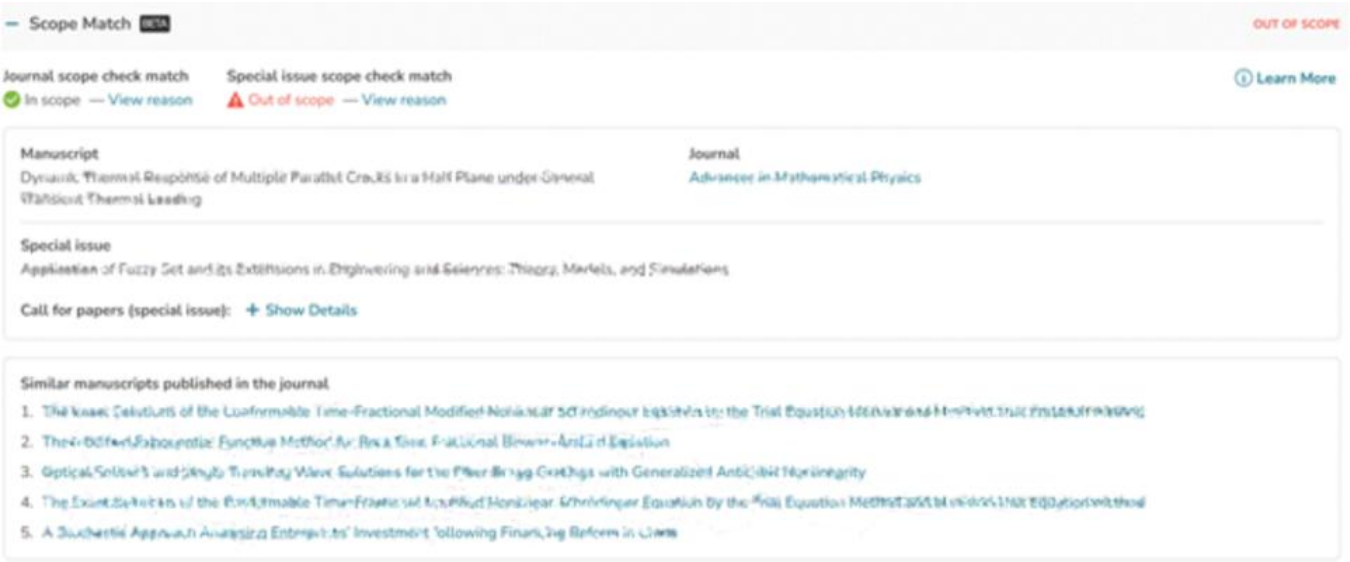
How results display within the manuscript view:

- *In Scope*

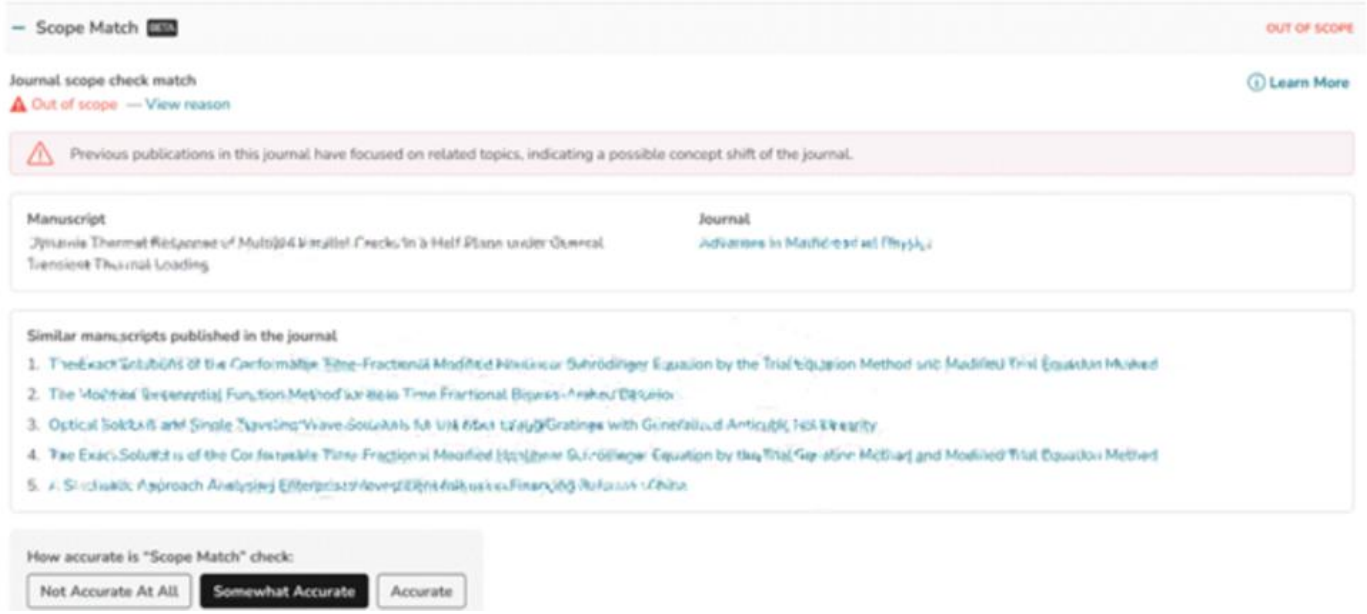




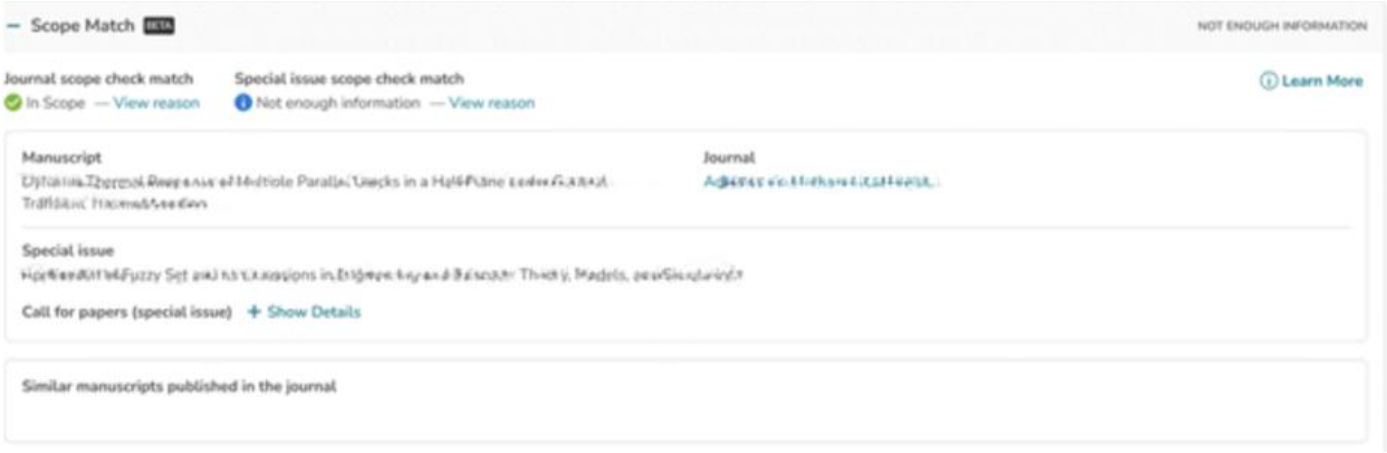
Out of Scope



Out of Scope, but publication history triggered



Not enough information



March-2026: Reflect the correct activity and roles in the manuscript activity logs

Available from	26-March-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors, Editorial Assistants, Admins, Reviewers
Overview	The manuscript activity log now more accurately reflects the specific editorial workflow step and the correct editor role associated with each action. This

	enhancement removes ambiguity in multi-step processes—such as multi-tier triage or post-peer-review stages—and is needed to allow for custom roles

Key Features

- **Exact workflow sub-steps displayed**
  Activity cards now show the *specific* manuscript flow step (e.g., **Pre-peer review 1**, **Pre-peer review 2**, ..., **Post-Peer-Review 1**, etc.), instead of repeating generic labels.
- **Correct role labels shown in activity logs**
  Each activity card now displays the **full editorial role label** (e.g., *Chief Editor*, *Associate Editor*) instead of the abbreviated internal code previously shown.

This includes the Full Access Editorial role, previously shown as ME, and now will be displayed as *Managing Editor*

- **Improved filtering by editor role**
  Roles that appear in multiple workflow stages now appear **only once** in the filter list.
  Selecting a role shows all actions taken by that editor across triage, peer review, and post-peer-review stages.

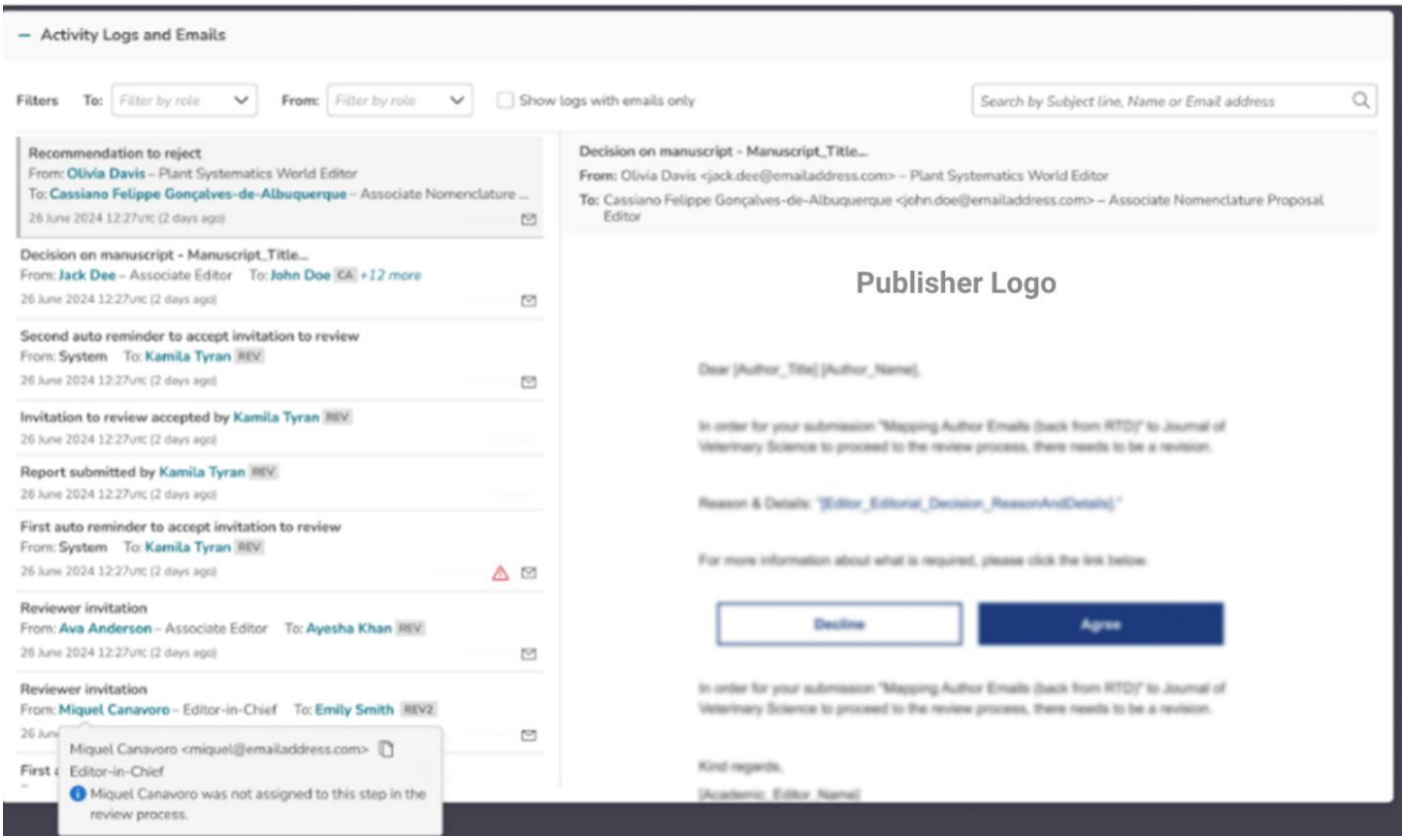
User Interface Updates

-Updated filter design

- Role filters are deduplicated and show user-friendly labels.
- Selecting a role filter to all activities performed by that editor across all workflow stages.

-Activity log cards now display:

- Full manuscript flow step name (e.g., *pre-peer review1*, *peer review, post-peer-review 2*).
- Full editor role label instead of abbreviations.



-Updated filter design

- Role filters are deduplicated and show user-friendly labels.
- Selecting a role filter to all activities performed by that editor across all workflow stages.

March -2026: Submission volume per Author displayed within Author Identity Verification

Available from	26-March-2026
Impacted Module	Research Exchange **Screening**
Impacted Roles	Screeners (Wiley tenant only)
Overview	Screeners can now see how many manuscripts each author on a manuscript has submitted to Wiley journals over the last 12 months. This signal helps screeners identify authors submitting at unusually high

	volumes, which may indicate spam behavior or low-quality bulk submissions.

Key Features

On the Author Identity Verification screen, two counts are displayed for each author in the author list:

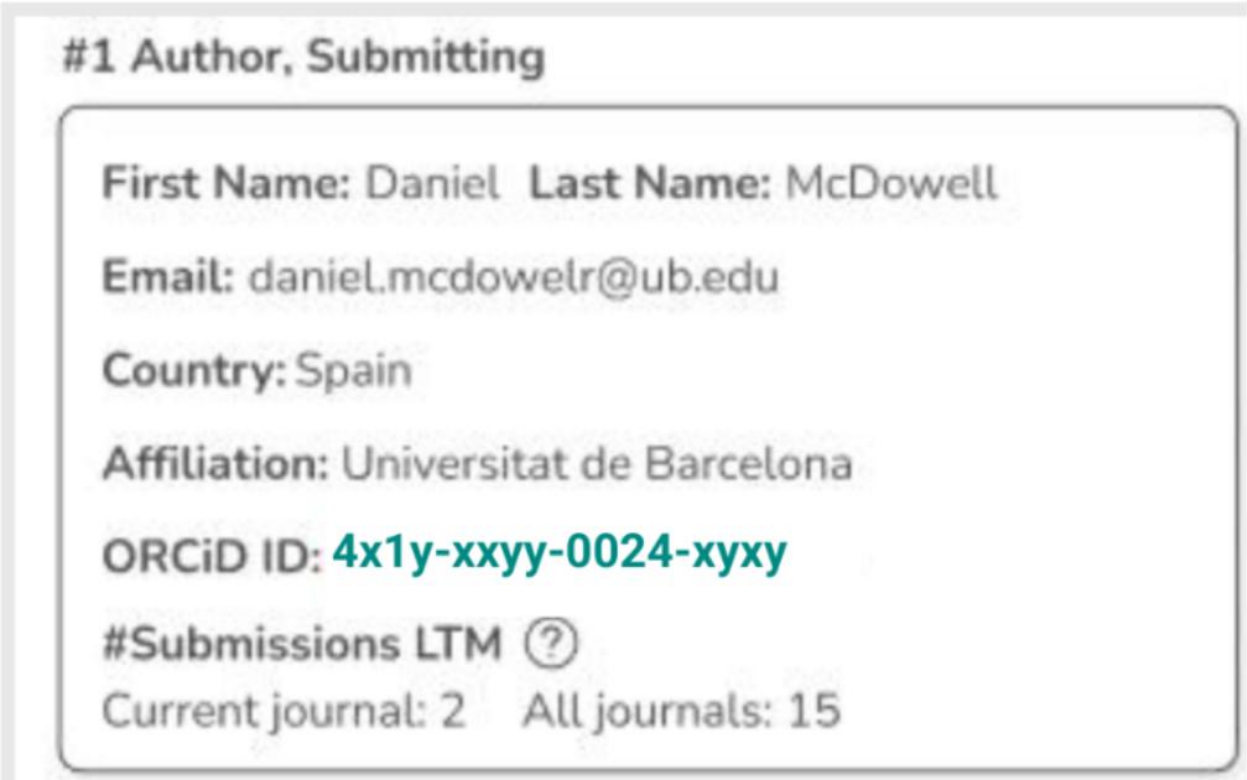
- *Submissions to this journal (last 12 months)*
- *Submissions across all Wiley journals in Research Exchange (last 12 months)*

Counts are counted using email address, are unique per manuscript (revised or return-to-draft resubmissions are not double counted) and are ringfenced for the Wiley tenant.

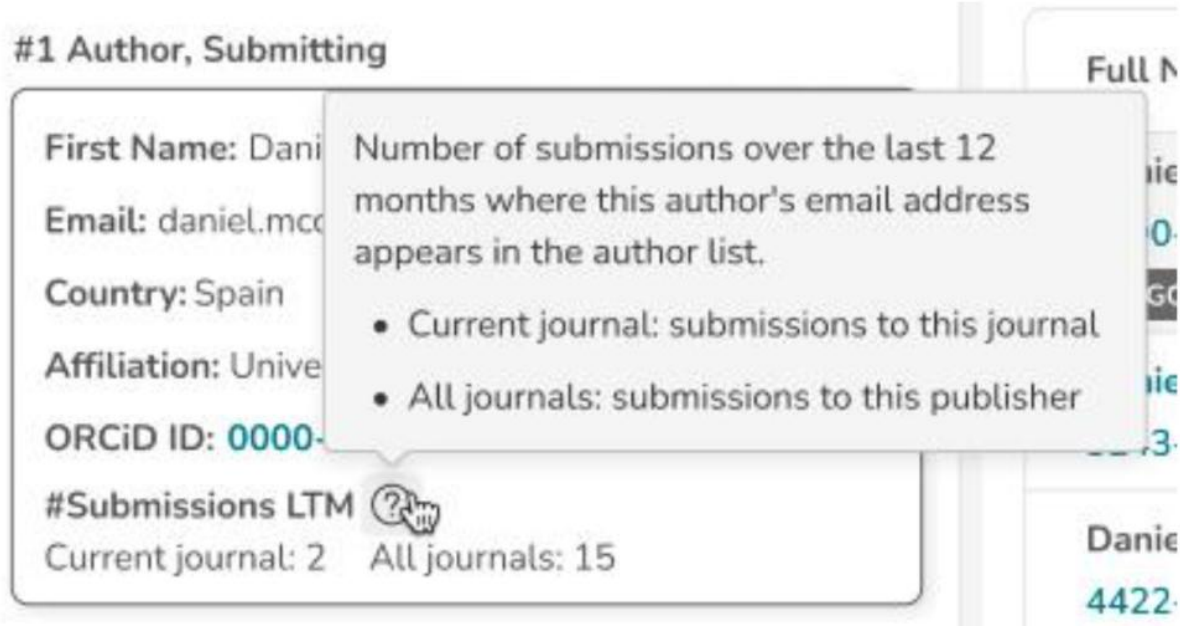
User Interface Updates

Author Verification screen

#Submissions LTM ("last twelve months") added



-Hover over the icon to display tool tip/explanation

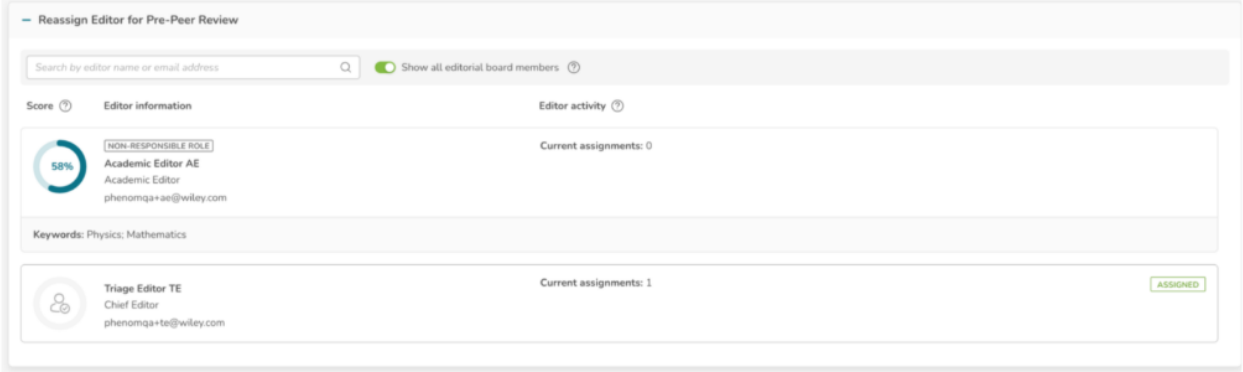


March-2026: Expanded Editor Selection for Pre-peer, Peer, and Post-peer Review Activities

Available from	23-March-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editorial Assistants, Admins, and Journal Managers
Overview	Currently, when an Editorial Assistant, Administrator, or Journal Manager invites/assigns an editor in Pre-peer review, they are able to use a toggle to select an editor from any editorial role in Pre-peer review step 1. With this release, the toggle is now available during pre-peer review step 2, Peer review and Post-peer review activities.

User Interface Update

-"Show all editorial board members" toggle now appears during Peer review and Post-peer review activities.



March-2026: Conflict of Interest: Reviewer Name Matching

Available from	17-March-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors
Overview	Research Exchange Review now flags potential conflicts of interest (COI) when a reviewer's name exactly matches the name of an author on the manuscript under consideration. This enhancement addresses a gap in the existing COI detection logic: previously, reviewers with the same name as an author but a different registered email address could appear in suggestions without any COI signal. Flagged reviewers are **not** removed from results, but are flagged. Editors retain full visibility and the ability to invite or queue flagged reviewers, with clear warnings surfaced at the point of reviewer selection.

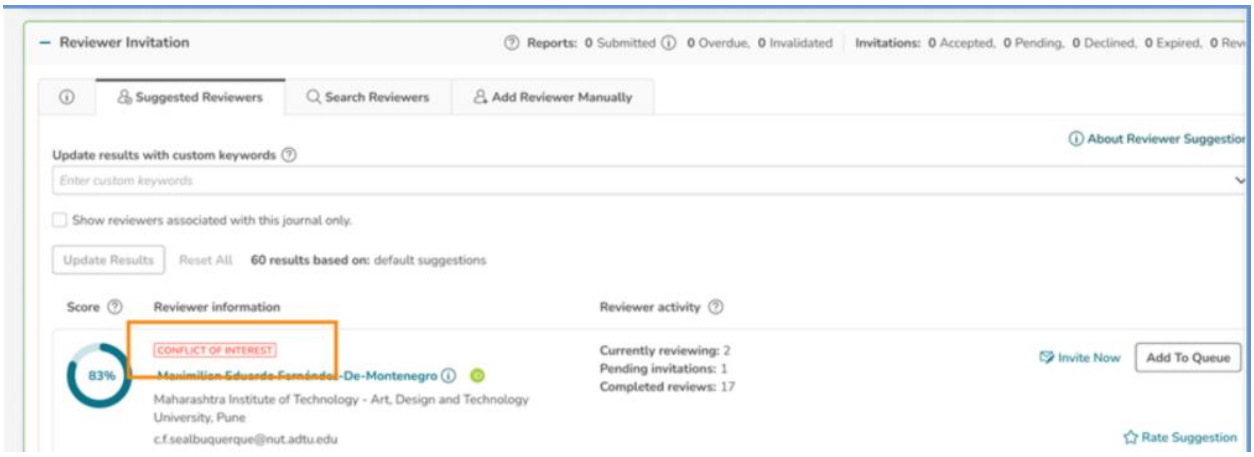
Key Features

- A potential COI is flagged when there is an exact, case-insensitive match between a reviewer's name and any author listed on the manuscript. Matches against multiple authors are supported, though this scenario is expected to be rare.

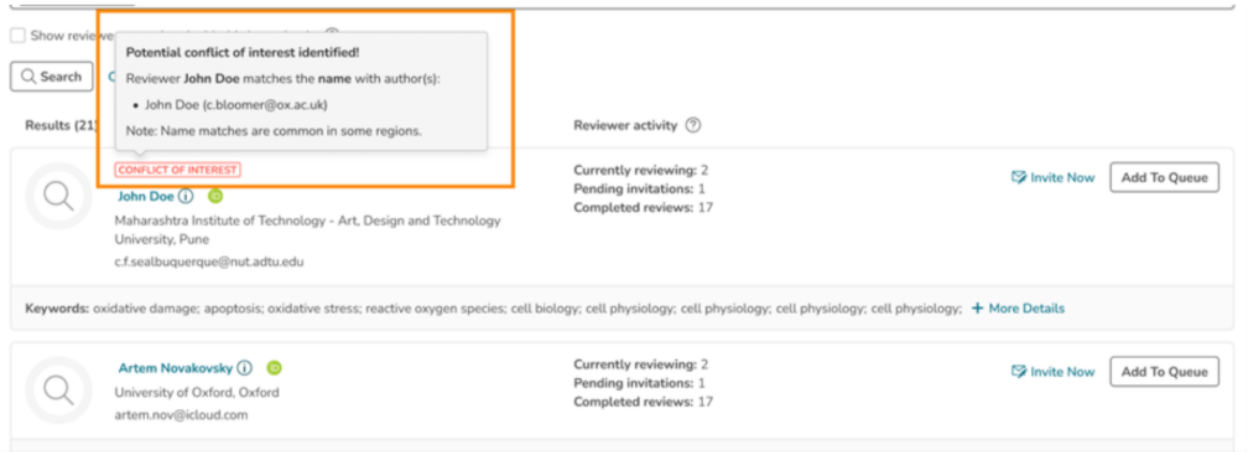
- Flagged reviewers remain visible in all reviewer lists. Exact name matches are common across many regions and may not represent a genuine conflict; editorial judgment is required before acting on a flag.
- When an editor attempts to invite or queue a reviewer flagged for a potential COI, a warning modal is displayed.
- Where both a name match *and* an affiliation match are present, the popover and warning modal combine both signals into a single, consolidated display.

User Interface Updates

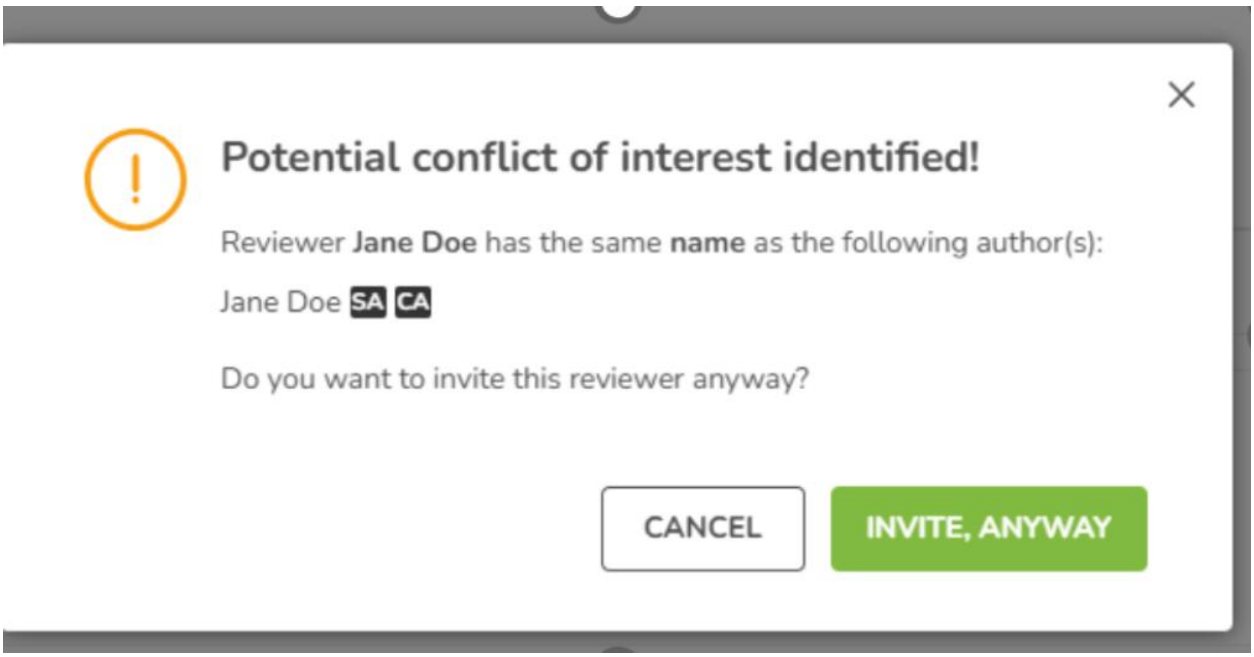
-COI tag on reviewer cards: A red **CONFLICT OF INTEREST** tag appears on the reviewer card wherever the reviewer is surfaced — 'Suggested Reviewers' tab, 'Search Reviewers', 'Specialized Reviewers', and 'Previous Version Reviewers'.



Hover popover: Hovering over a flagged card displays a popover with the label "Potential Conflict of Interest" and the advisory note: "Note: Name matches are common in some regions."



Warning modal: Inviting a reviewer flagged with CONFLICT OF INTEREST due to having the same name as one of the authors triggers a confirmation modal warning about the potential conflict of interest.



March-2026: Customizable Signature at the User Profile Level

Available from	9-March-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editors — users who are active board members on at least one journal, including special-issue boards.

Overview	Editors on system emails can now customize their signature at their user profile level to give senders more flexibility and control over communicating with transparency about their identity, role on the manuscript, and affiliations.

Key Features

Save custom signature at ReX Review user account level

- Users can navigate to their My Profile section in ReX Review where they will find a new section entitled: “My Custom Email Sign-off and Signature”. The “Create Signature” button will open the “Create and Preview your Signature” modal
- Users can personalize the sign-off as part of their custom email signature
- Users can use a rich text editor to customize their signature, which includes styling elements like bold, italic, underline, and predefined variables for their ‘user role’ and ‘journal title’
- Users can preview their updates live in the “Preview Signature” window, which populates variable values based on a journal selected by the user (useful when the user has multiple editor roles across journals and special issues)
- Users can send a test email to their inbox by clicking the “Send Test Email” button, which uses a dedicated ‘Test Signature’ template for validation before any changes are saved
- The system will automatically use the custom signature in system emails where the respective user is the designated sender (e.g., the peer-review handling editor when sending an ‘Invitation to Review’, the decision-making editor when sending a ‘Decision Letter’), and where the signature element in the email template has been assigned a signature identifier by a system administrator
- The “Sender” is the person signing the notification, not the ‘From’ address seen by the recipient in their inbox (which is the journal office email)
- The custom signature value (including the sign-off) will replace the entire default signature block in the email template, provided that the signature element has been assigned a signature identifier by a system administrator

The signature element in templates is a text block with the following general structure:

Kind regards,

[[SENDER_TITLE]] [[SENDER_GIVENNAME]] [[SENDER_SURNAME]]

[[JOURNAL_NAME]]

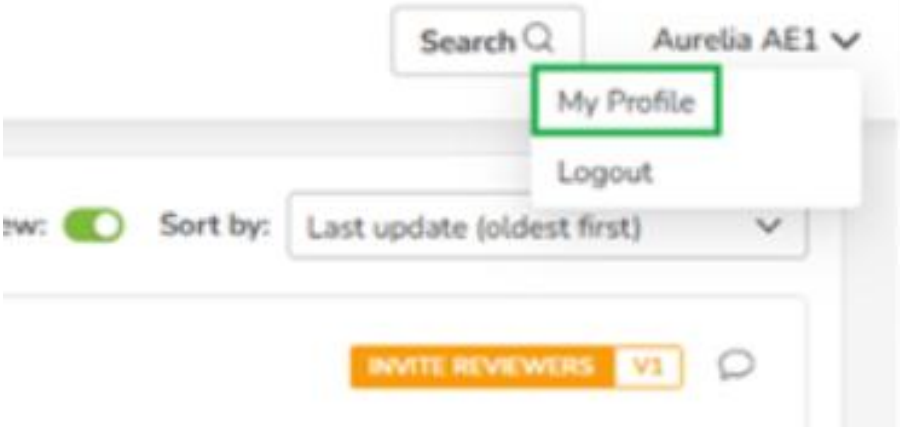
Dynamic User Role and Journal Variables

- Editors have the ability to include the variables [[User_Role]] and [[Journal_Title]] in the signature rich text editor, which will be automatically populated based on context.
- Editors are encouraged to use the variables in their custom signatures to ensure accurate, context-specific information in system emails, and to allow the system to automatically adjust values when users hold multiple roles across journals or special issues, or when their assignments change over time (e.g., being removed from a role or assigned a new one).
- System automatically adjusts signature details for users with multiple editorial roles across journals and special issues, as follows:

Editor has role in the Regular Editorial Board of a Journal	Editor has role in a Special Issue Board for that Journal	Issue Type of the Manuscript in the context of the email	[[User_Role]]
YES	NO	Regular Issue	The label of the role in the Regular Board
YES	YES	Any issue	The label of the role in the Regular Board
NO	YES	Special Issue	The label of the role in the Special Issue Board

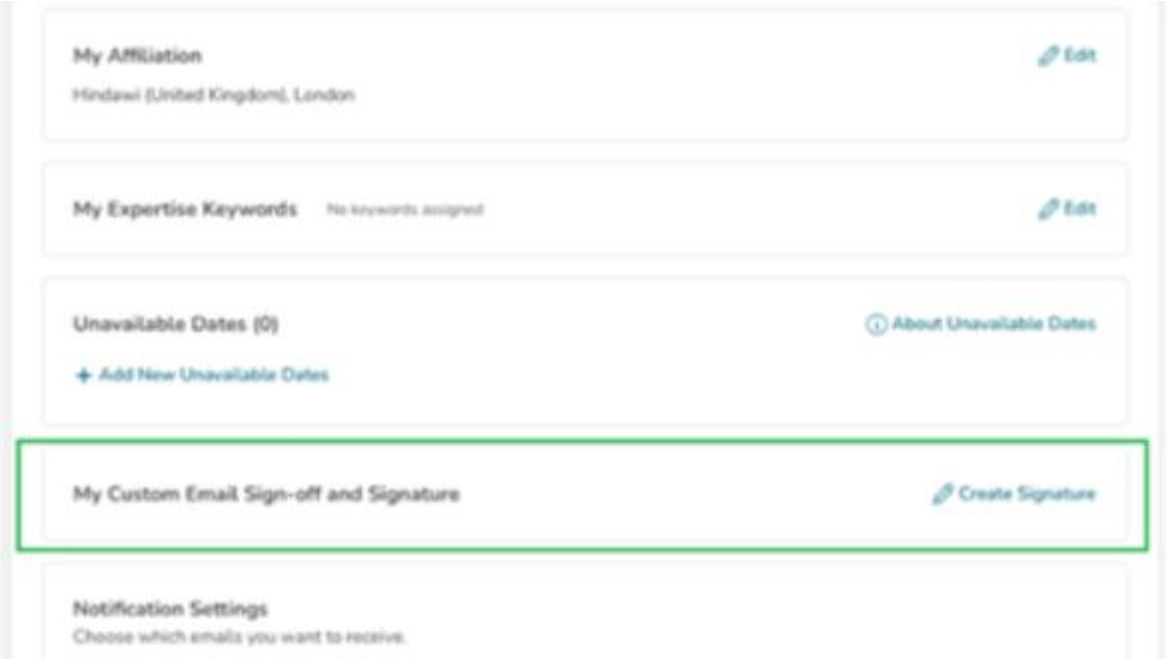
User Interface Updates

-*Entry Point* – 'Account Settings' page accessed via the 'My Profile' option in the user menu at the top-right corner of the screen in ReX Review



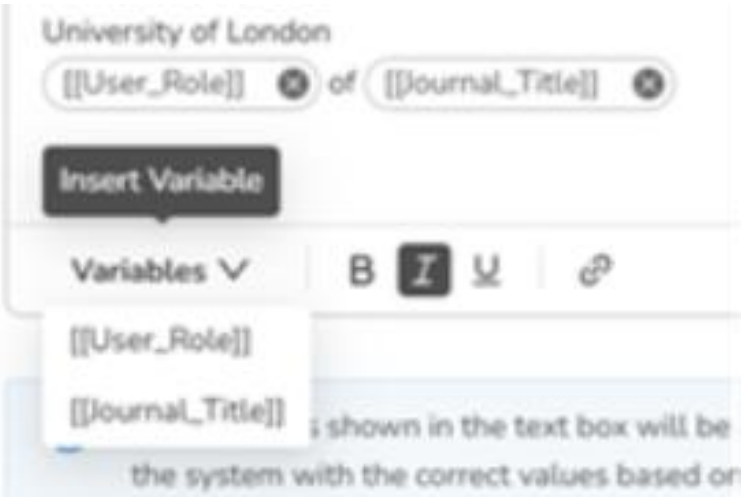
-New section on the Account Settings page: My Custom Email Sign-off and Signature.

-The button Create Signature opens the "Create and Preview your Signature" modal (the button updates to Edit after a custom signature has been saved)



- The modal **Create and Preview your Signature** enables customization and live preview of changes before they are saved
  Modal components:
- Left panel: **Create Signature**
  Form to customize the signature split into: *Custom sign-off* (e.g., “Kind regards”), and *Signature rich text editor* with basic formatting (bold, italic, underline), insert link, and variable placeholders
- Right Panel: **Preview Signature**
  Real-time rendering of the custom signature that updates live as the user types, and that populates the values of the variables based on journal selection (journal options drop-down).
  Intended to help editors select one of multiple roles on journals/special issues, to visualize how the signature looks like in the respective context

- **Variables drop-down** - allows editors to include the variables: [[User_Role]], [[Journal_Title]] available from a selection drop-down



- **Journals drop-down** – allows editors to preview the signature for their role on different journals

March-2026: User Interface Update: Editorial workflow and editor information is made available in the manuscript view

Available from	9-March-2026
Impacted Module	Research Exchange **Review; 3-tier Journals ONLY**

In **3-tier Journals ONLY** a new side panel is now available to display key submission information.

Left-Side Collapsible Menu

- This panel:
- Lists all submission steps according to the editorial workflow at the time of submission
- Clearly indicates the current active step
- Shows which editors are assigned to each activity
- Updates dynamically as the submission moves through the workflow
- Completed steps are marked accordingly
- The next upcoming step becomes highlighted
- Editor invitations/assignments are surfaced as they occur

Floating Submission Header

- As the user scrolls, the submission header (including version details and core information) remains visible

- Provides a quick way for users to switch to the most recent version

Navigating Older Versions

- When viewing an older version, the left-side panel includes a simple mechanism for editors to jump directly to the latest version

March-2026: User Interface Update: 'Suggestion List'

Available from	9-March-2026
Impacted Module	Research Exchange **Screening**
Impacted Roles	Screeners
Overview	The Author Identity Verification 'Suggestion List' has been updated to better target likely author identities.

Key Features

Drawing on wide network analysis with the PKG service, ReX now assigns confidence scores to suggested matches.

- Authors scoring 0.8 or above are tagged with a 'Suggested Match' badge and ranked at the top of the list – this threshold has been validated at 99% accuracy.
- Results are now limited to 10 (from 20).

User Interface Updates

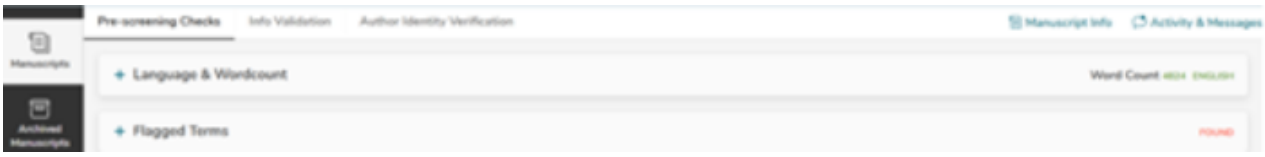
Author Identity Verification Screen

"Suggested Match" tag

March-2026: User Interface Update: Update terminology and naming conventions, Optional text box for comments

Available from	3-March-2026
Impacted Module	Research Exchange **Screening**

Suspicious Keywords are now ‘Flagged Terms’



Sanction List is now ‘Publisher Sanctions’

Black List is now ‘Ban List’

Under Peer Review Cycle Checks, there is now an optional text box to add comments

Feb-2026: Unified Dashboard for all Review users

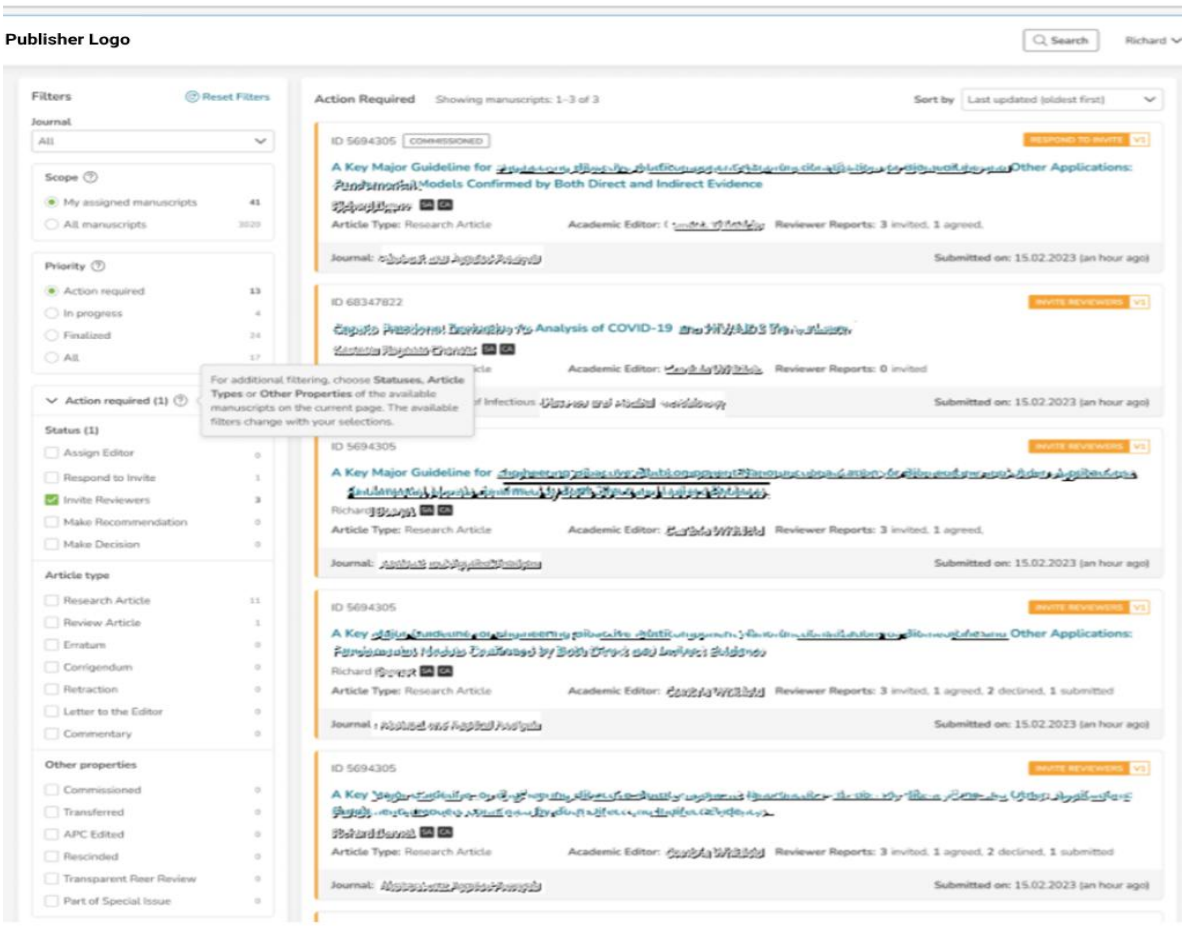
Available from	25-February-2026
Impacted Module	Research Exchange **Review**
Impacted Roles	Editorial Assistants (EAs), Journal Managers (JMs) (excludes Admin)
Overview	We are introducing a **Unified Dashboard** for all Review users, consolidating the existing dashboards into a single, streamlined interface. This update simplifies navigation, improves consistency in design, allows multiple roles to enjoy the same feature and reduces technical debt by removing legacy dashboard.

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.

- Filters are now **nested in the following order**:
  - Journal
  - Focus
  - Author Search – by email address only
  - Editor Search – by name or email address
  - Status
  - Article Type
  - Other Properties
- Consistent design language applied across all Review roles for a cleaner, more intuitive experience.



Feb-2026: Display Screening Report results in Review for all versions

Available from	19-February-2026
Impacted Module	Research Exchange **Screening and Review**
Impacted Roles	Editors, Admins, Editorial Assistants
Overview	Editors can now view **screening results for every manuscript version**, not just the initial submission. As screening checks are rerun during revisions—and new comments or similarity scores may be added—Review now surfaces version-specific results across the full submission lifecycle. This gives editors complete context at all stages of the editorial workflow and supports more informed decision-making.

Key Features

Version-Specific Screening Reports

- The Screening Report section now displays results for whichever manuscript version the user is viewing.
- Results include:
  - iThenticate Similarity Score
  - Scope Match results
  - Screening comments (including comments to publisher)
- Formatting and layout match the existing version-1 experience.

Accurate Display of Screening Data

- Screening data is now saved for every version that undergoes screening, triggered by RevisionChecksPassed events.
- Comments, similarity results, and scope outcomes always correspond to the correct manuscript version.

Correct Handling of Versions With No Screening

- If screening was not run on a version (e.g., screening disabled for revisions), the Screening Report section displays a version-appropriate “No results available” message.

Updated iThenticate Disclosure Text

- The Similarity Score section now uses updated explanatory text:

“Similarity scores are powered by iThenticate, which compares the manuscript text against published works. A high score could indicate plagiarism.”

- The section is collapsed by default for cleaner review.

User Interface Updates

Clear Version-Specific Display

- The Screening Report section dynamically updates based on the version selector.
  Editors immediately see screening information tied to the version they are viewing.

Consistent Section Behavior

- The Screening Report UI uses the same layout and organization as version 1 for all subsequent versions, ensuring a consistent reading experience.

Visibility Logic

- If a version has no screening results, the UI clearly displays the “no results available” message rather than showing empty placeholders.
- If a version has screening data, all relevant subsections—Similarity Score, Scope Match, Screening Comments—appear exactly as in version 1.

Updated iThenticate Information Panel

- The iThenticate help text has been refreshed and placed beneath the Similarity Score.
- This panel is now collapsed by default, reducing visual clutter and letting editors expand it only when needed.

Accurate Comments Display

- Editors now see screening comments from the correct version, ensuring no cross-version confusion in the comments list.

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
  - 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?
  - Other editors with a role assigned on the manuscript
  - Editors on the journal board with Full Access Editor permissions (either actioning taking or observational FAEs)
  - EA
  - 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

    - 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

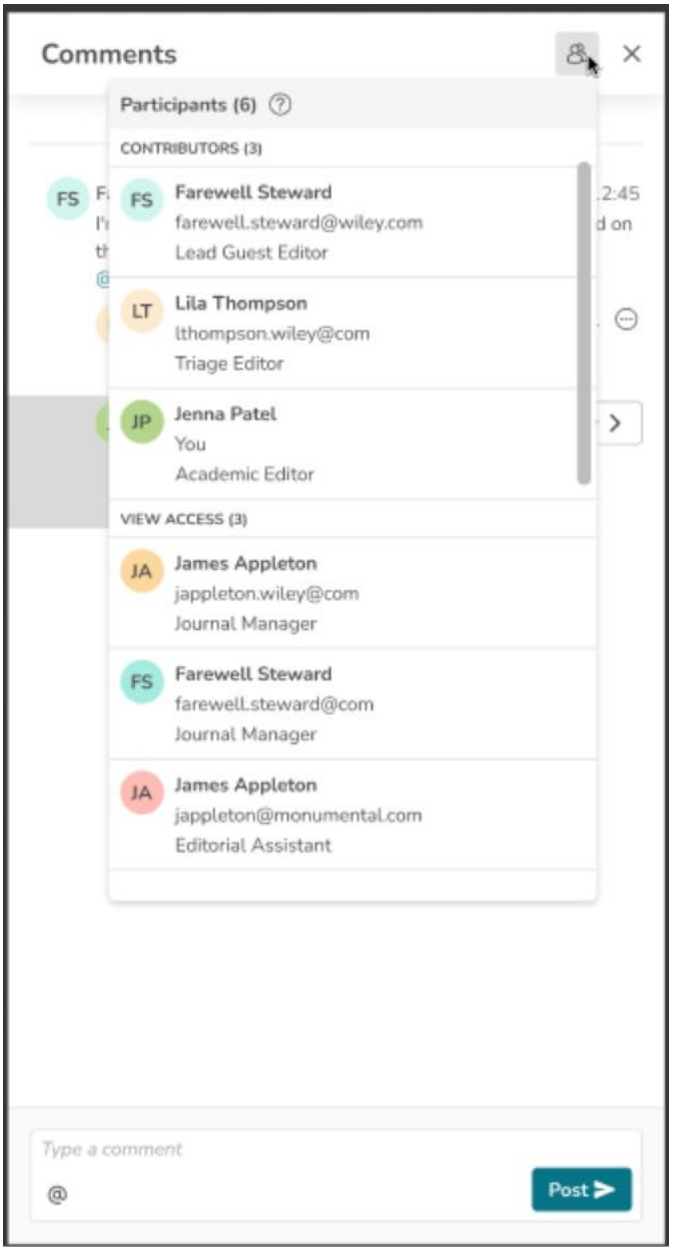
  All users who have access to the manuscript can now:

    - 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.

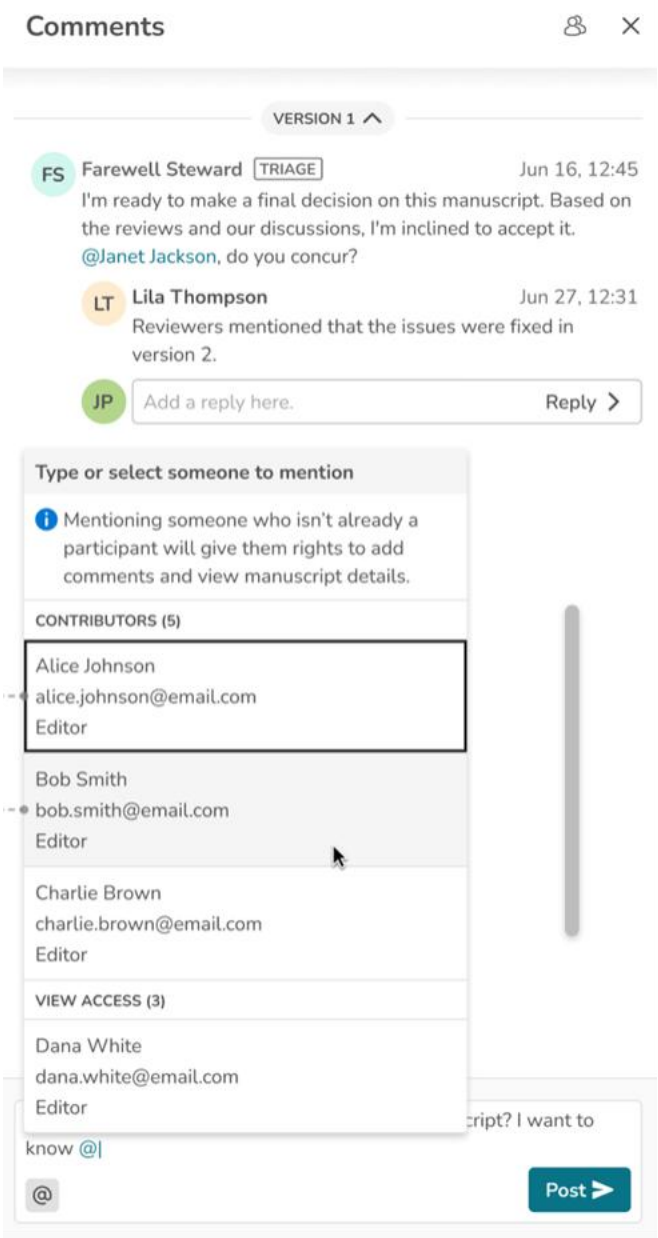
Comments Panel: Updated to show participants with access.

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”



Tagging UI: Responsive dropdown for tagging editorial board members.



Dashboard: New section for “Manuscripts Requiring My Input.”

Notifications:

Comments Notification Rules

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

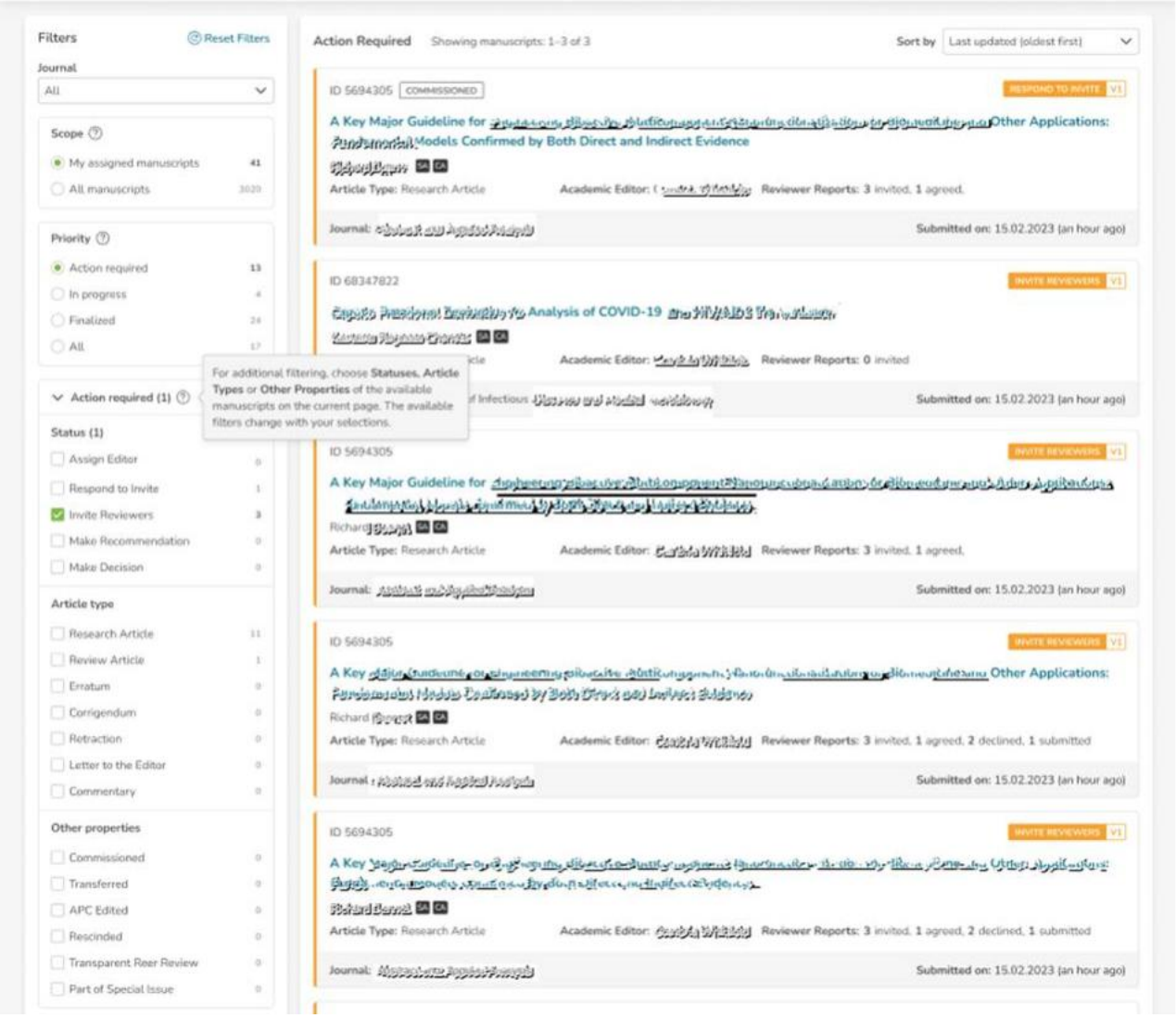
Users with Journal-wide or Editorial Assistant access can also search by:

- 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.

Filters are now nested in the following order:

  - Journal
  - Focus
  - Author Search – by email address only
  - Editor Search – by name or email address
  - Status
  - Article Type
  - 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**

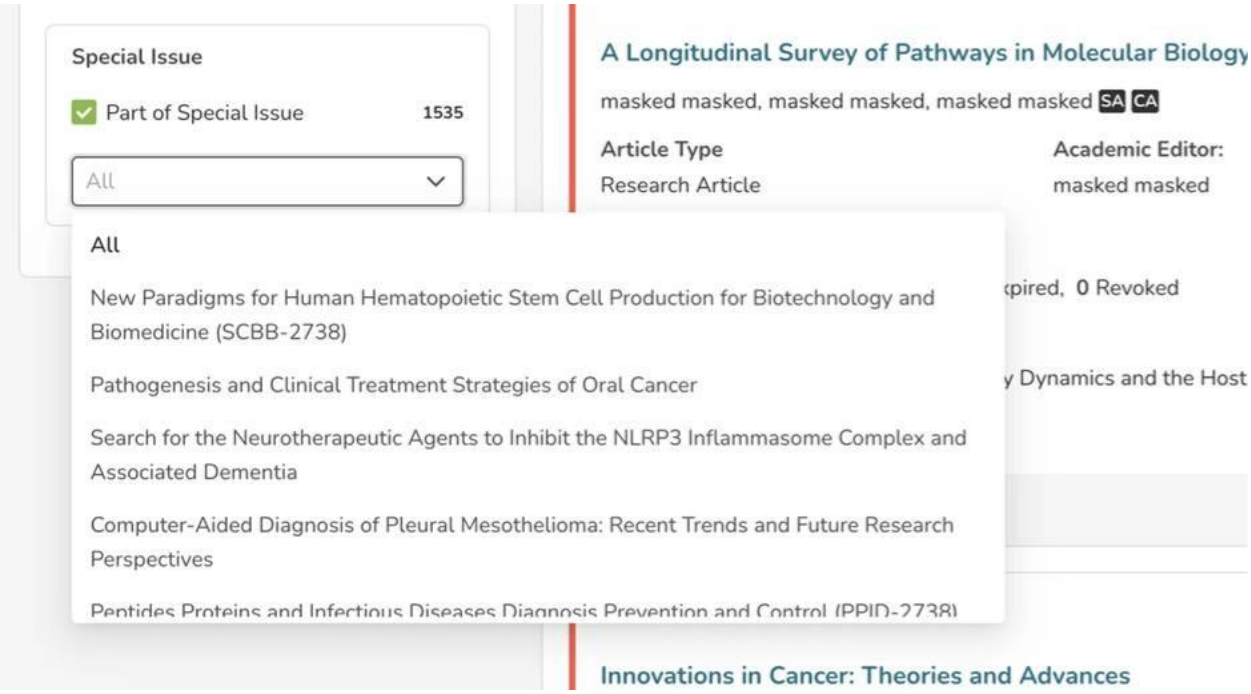
Special Issue is now its own filter category on the Unified Dashboard (live with Editor view now, other roles to following during rollout of unified dashboard in coming weeks [end-Feb 2026].

- '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

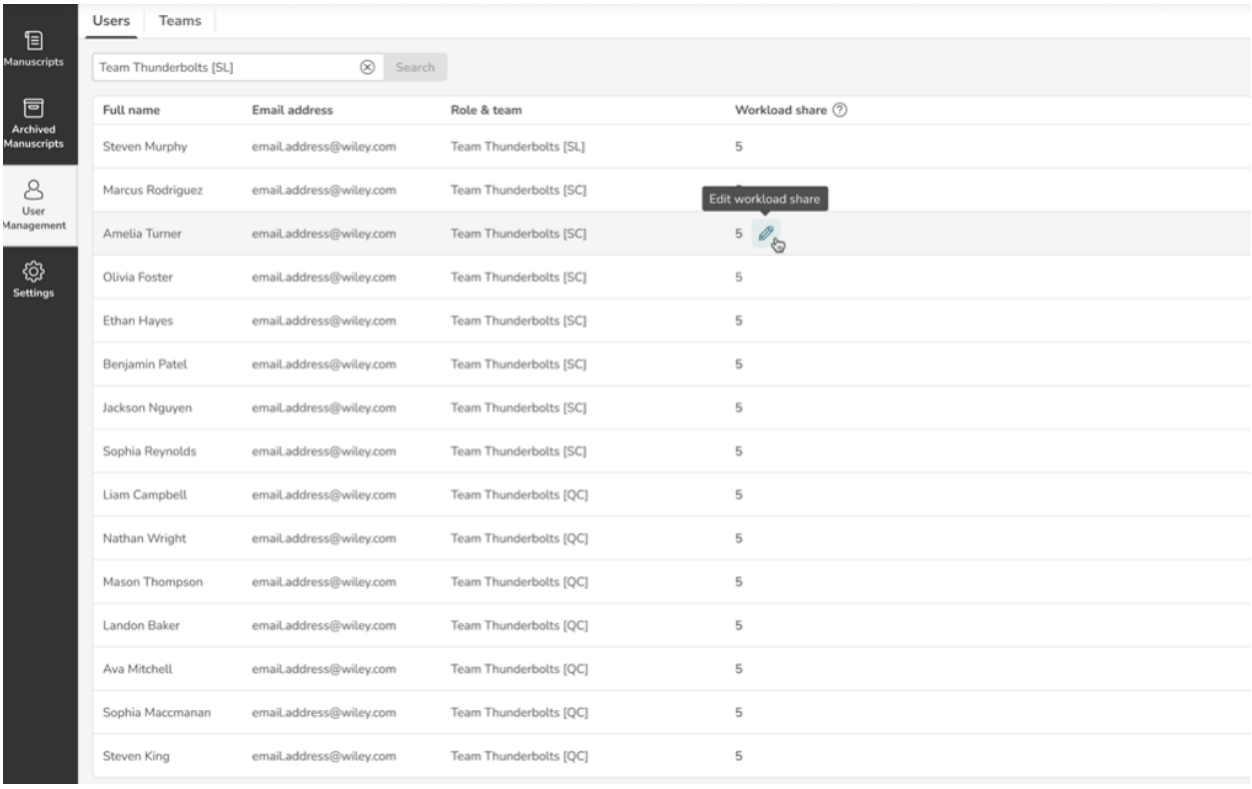
- Lead Screeners: View Users tab, edit Checker capacity only
- Lead Specialists: View Users tab, edit Specialist capacity only
- Admins: View Users tab, edit all Screener and Specialist capacity
- Checkers/Specialists: No access to Users tab or capacity editing

User Interface Updates

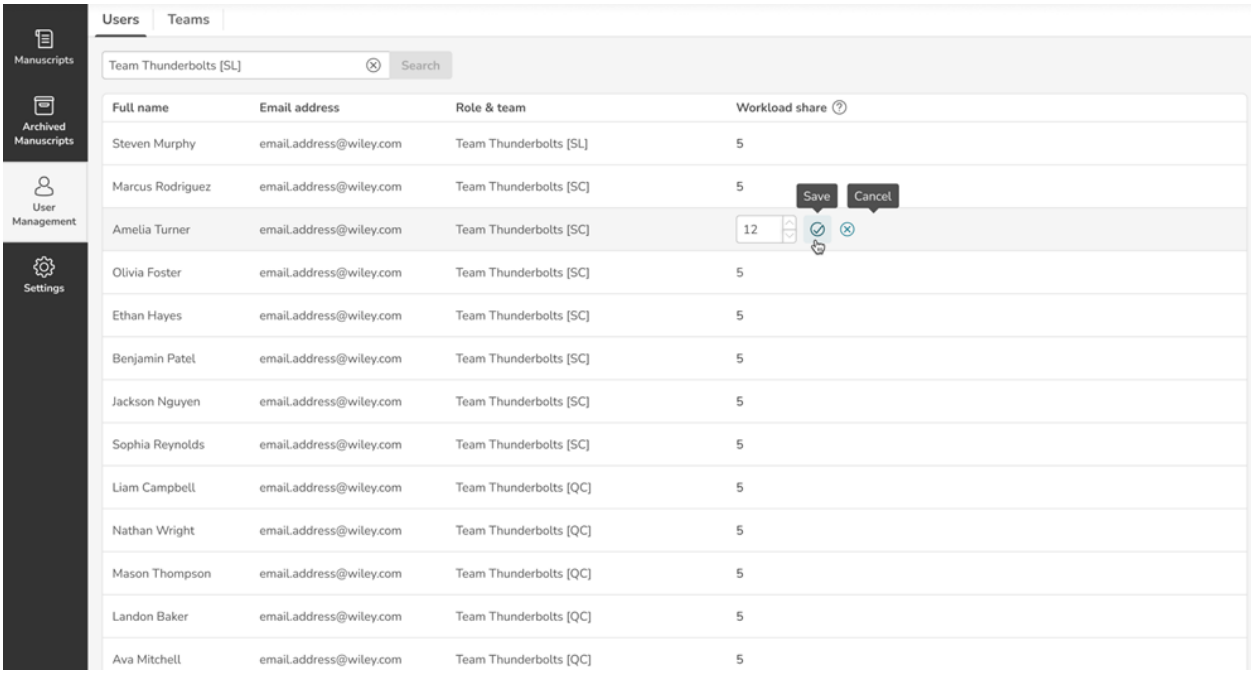
Workload Share

- 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

Search by name, email or team | Search

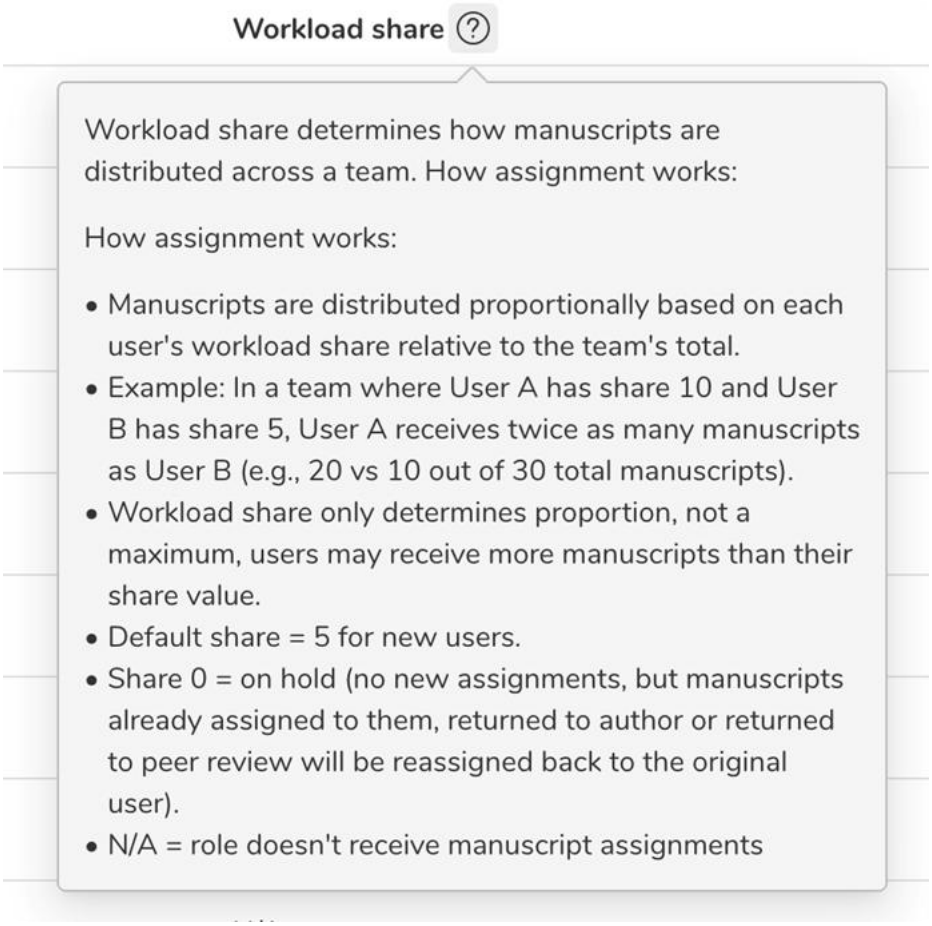
Full name	Email address	Role & team	Workload share
Stephan the Great	email.address@wiley.com	Image Screening Team [LS]	N/A
Marcus Rodriguez	email.address@wiley.com	Team Thunderbolts [SC]	5
Amelia Turner	email.address@wiley.com	Team Thunderbolts [SC]	0 • On hold
Olivia Foster	email.address@wiley.com	Team 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
Amelia Turner	email.address@wiley.com	Team Thunderbolts [SC]	12

Failed to save. Try again!

Hover over Workload Share tooltip



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:
  - 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:
  - Special Issue option is greyed out and disabled (explanatory text)
- Behavior remains consistent after Return to Peer Review from Quality Checks:
  - *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>>"

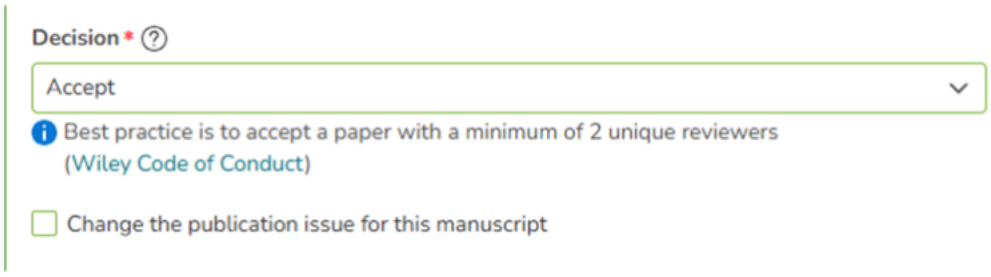
- This text is editable in the preview and may be amended to refine the message delivered to authors.

8. Data Transfer to Production Systems

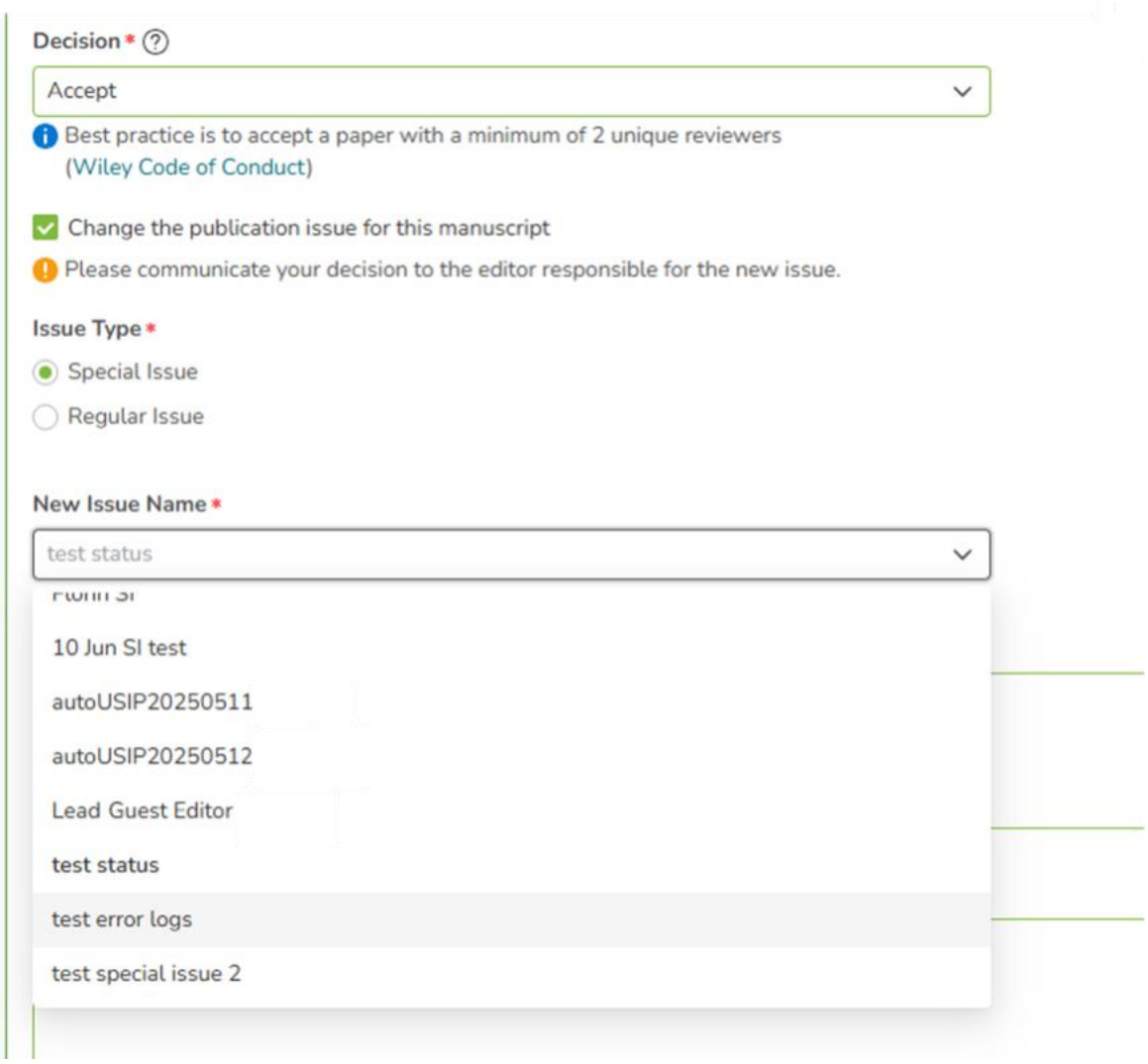
- After the decision to accept the manuscript for publication has been submitted, changes are sent downstream to production only once the **Material Checks** stage has been completed and all required manuscript files have been provided by the authors in accordance with production requirements.
- The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

User Interface Updates

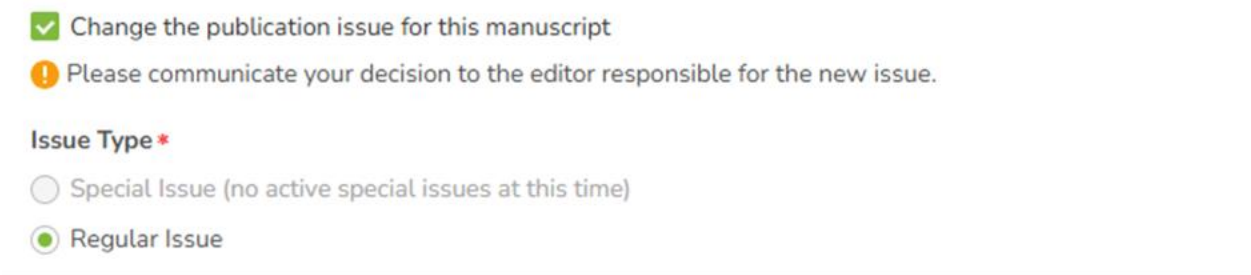
- *New checkbox: “Change the publication issue for this manuscript”.*



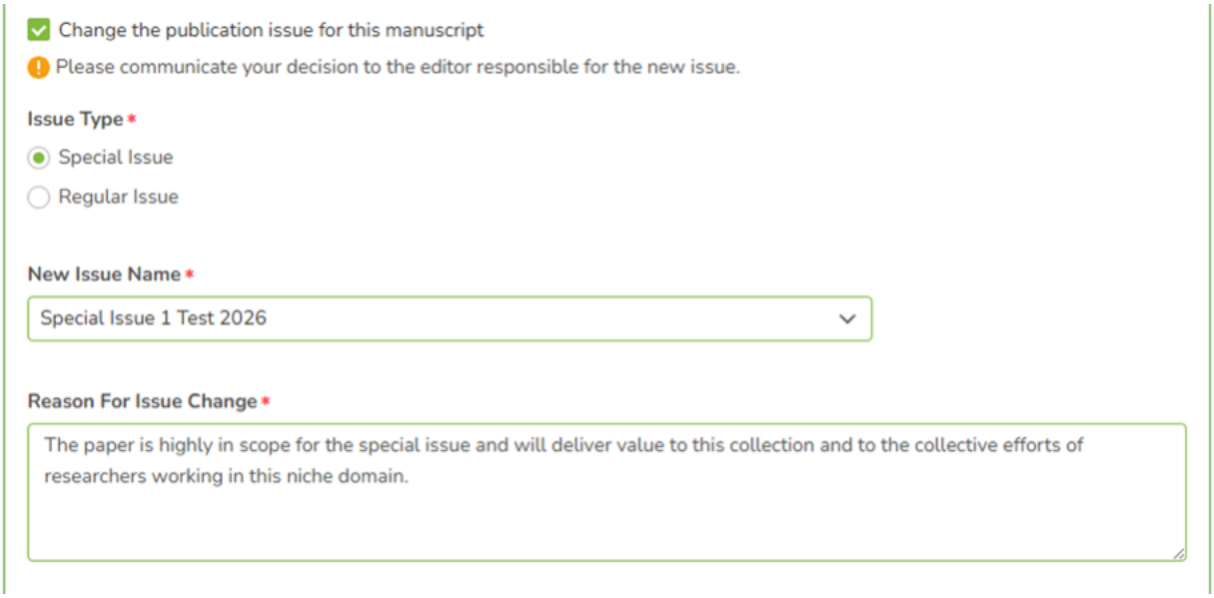
- *Radio buttons for “Issue Type” selection with conditional “Special Issue Name” dropdown.*



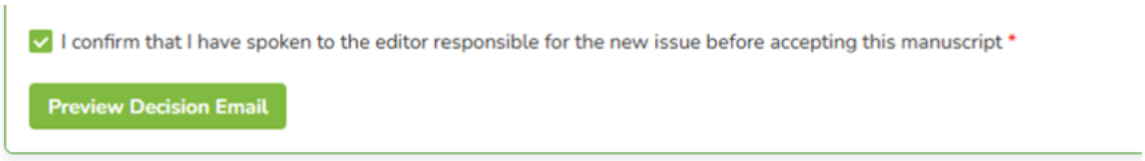
Disabled/greyed-out SI option when no active SIs exist.

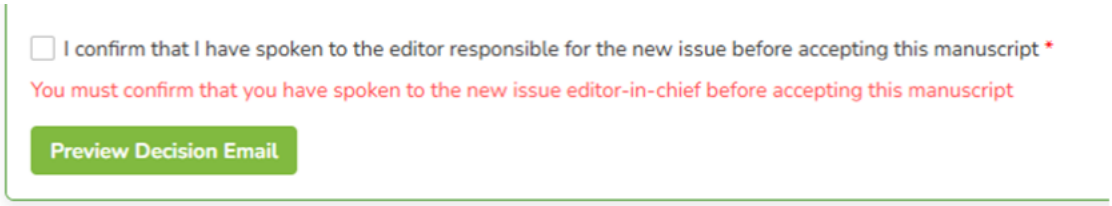


Mandatory Reason text area with autosave behavior.



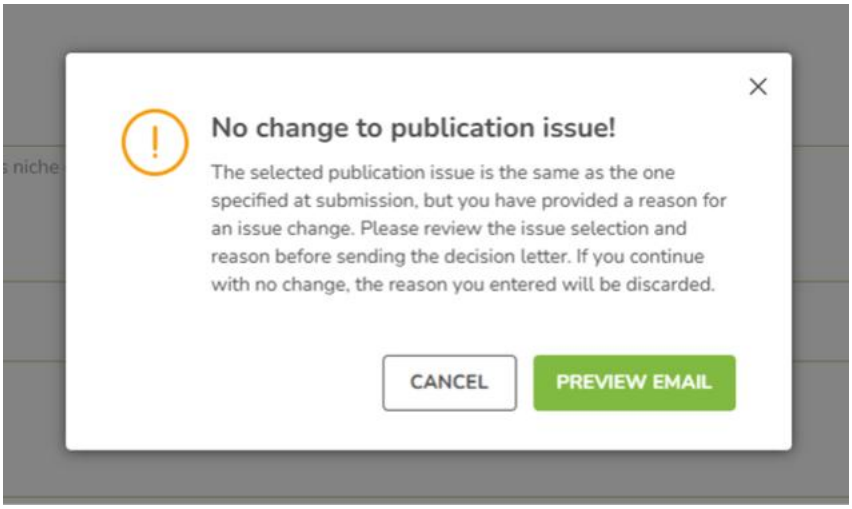
- *Mandatory confirmation checkbox (warning message displayed in red if Editor clicks "Preview Decision Email" without confirmation).*



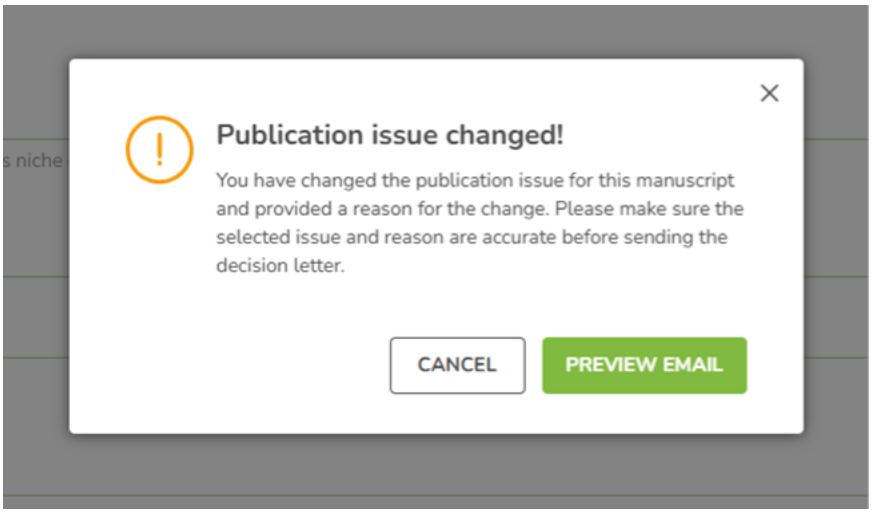


Confirmation modal shown prior to previewing the decision email.

- *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:

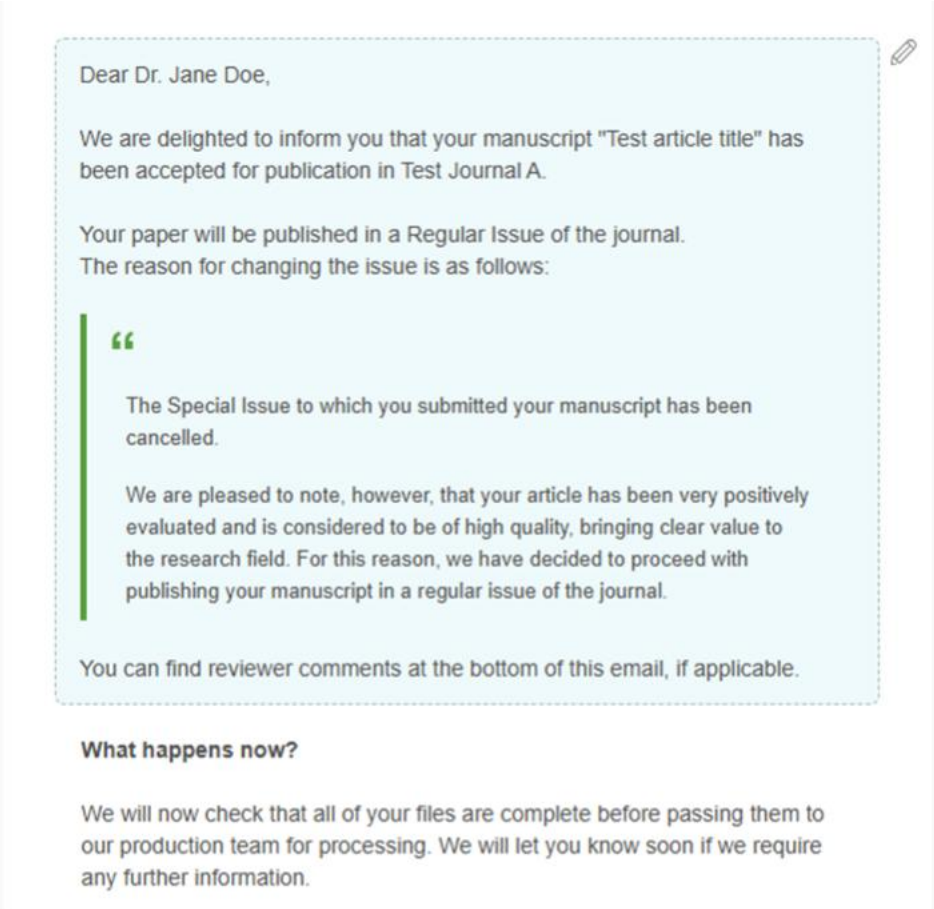
> "
>
> The paper is highly in scope for the special issue and will deliver value to this collection and to the collective efforts of researchers working in this niche domain.

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.

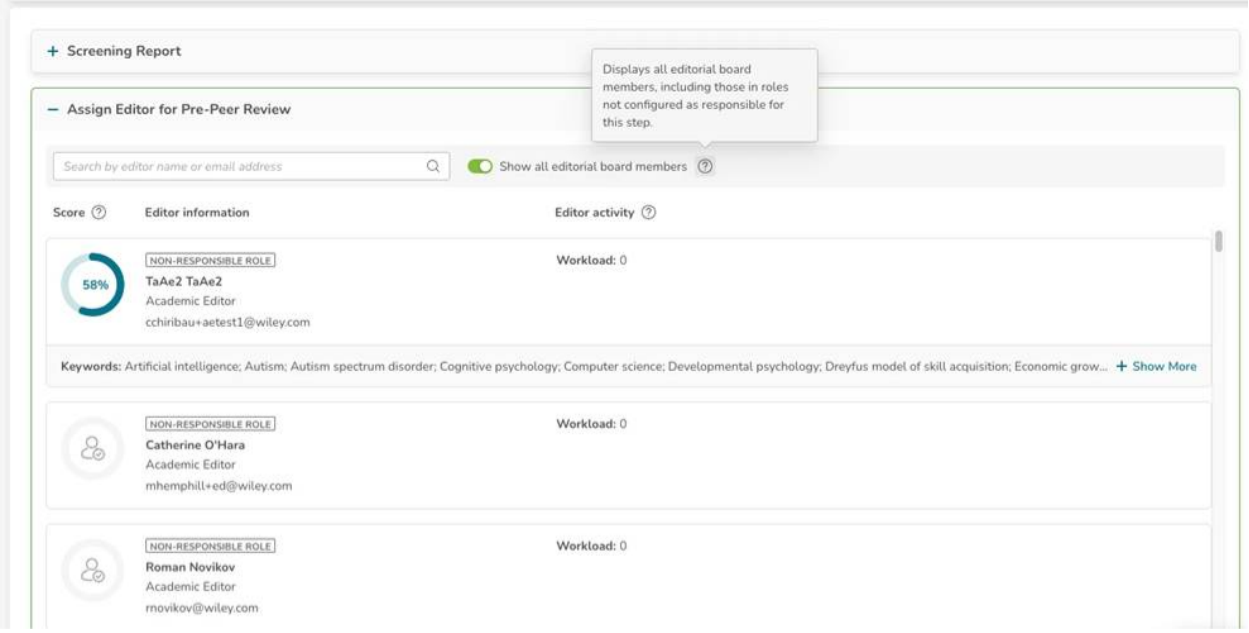
4. SI Editor Query by External ID

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".*



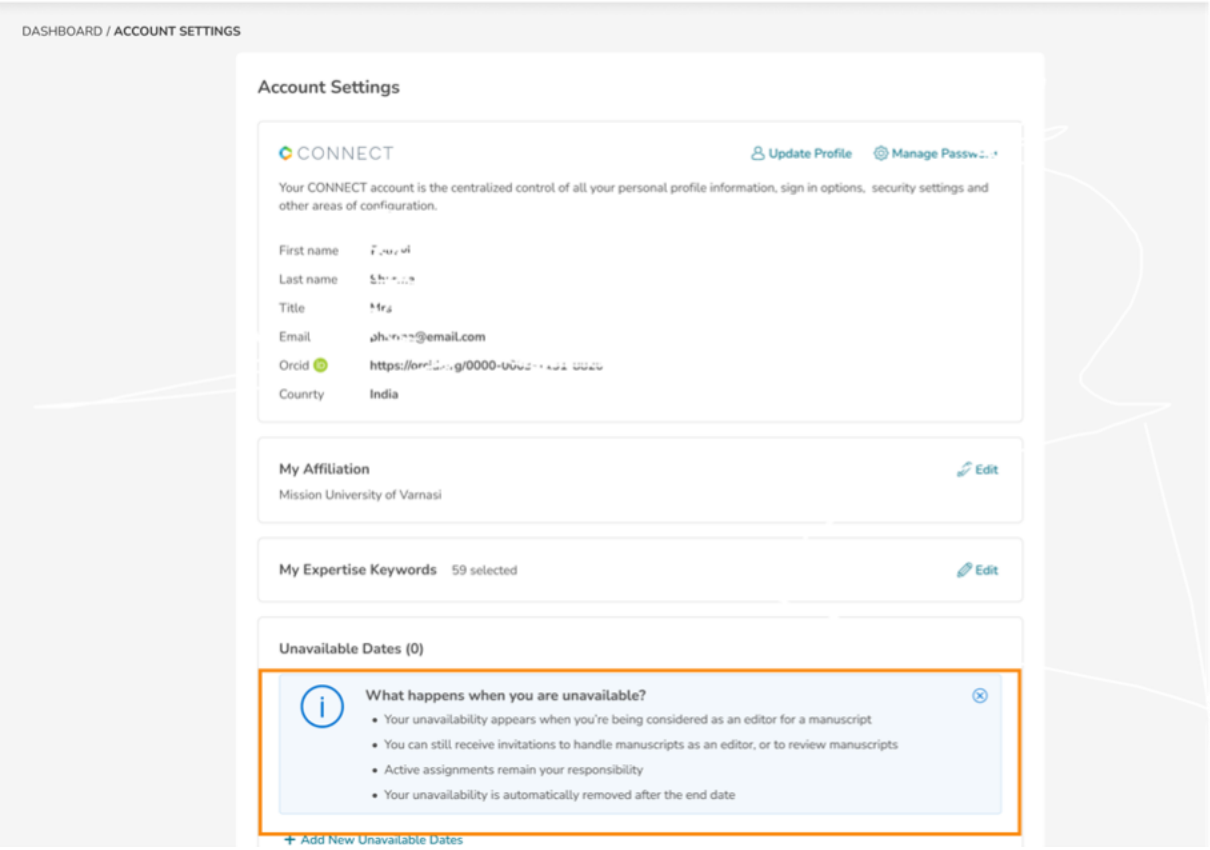
Dec-2025: Editors can record their availability in app

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.

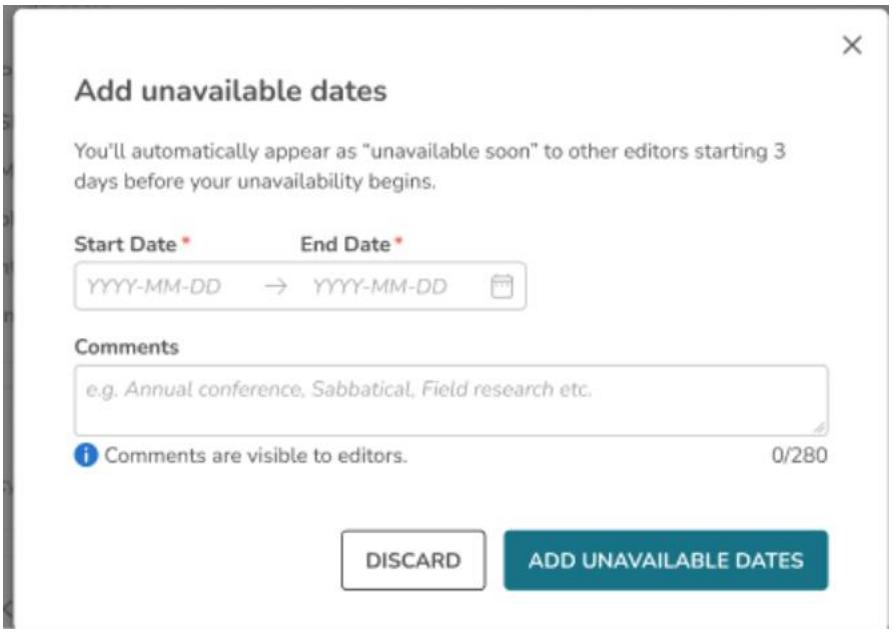
Key Features

- 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.

Profile Page: Editors can set and manage OOO dates from the "My Profile" section within Review

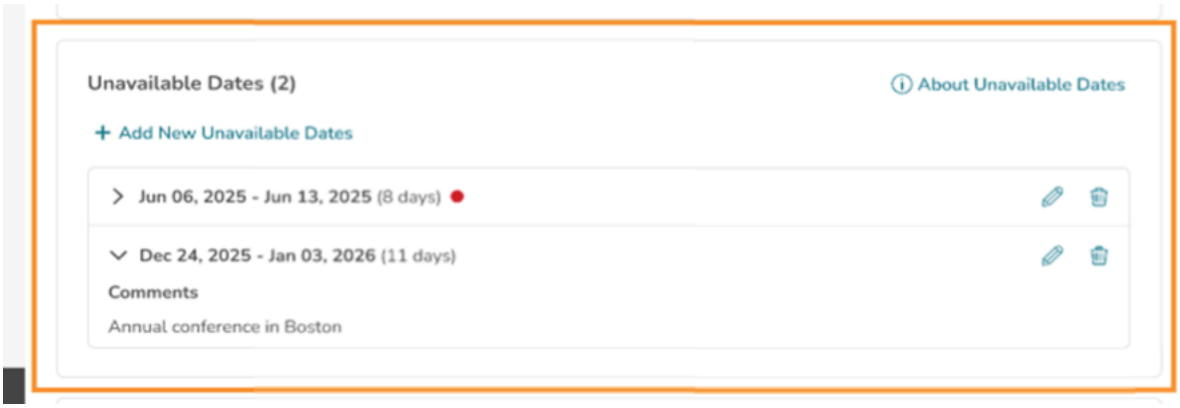


Modal is open by default. If it is closed, it can be re-opened by clicking "Add New Unavailable Dates"

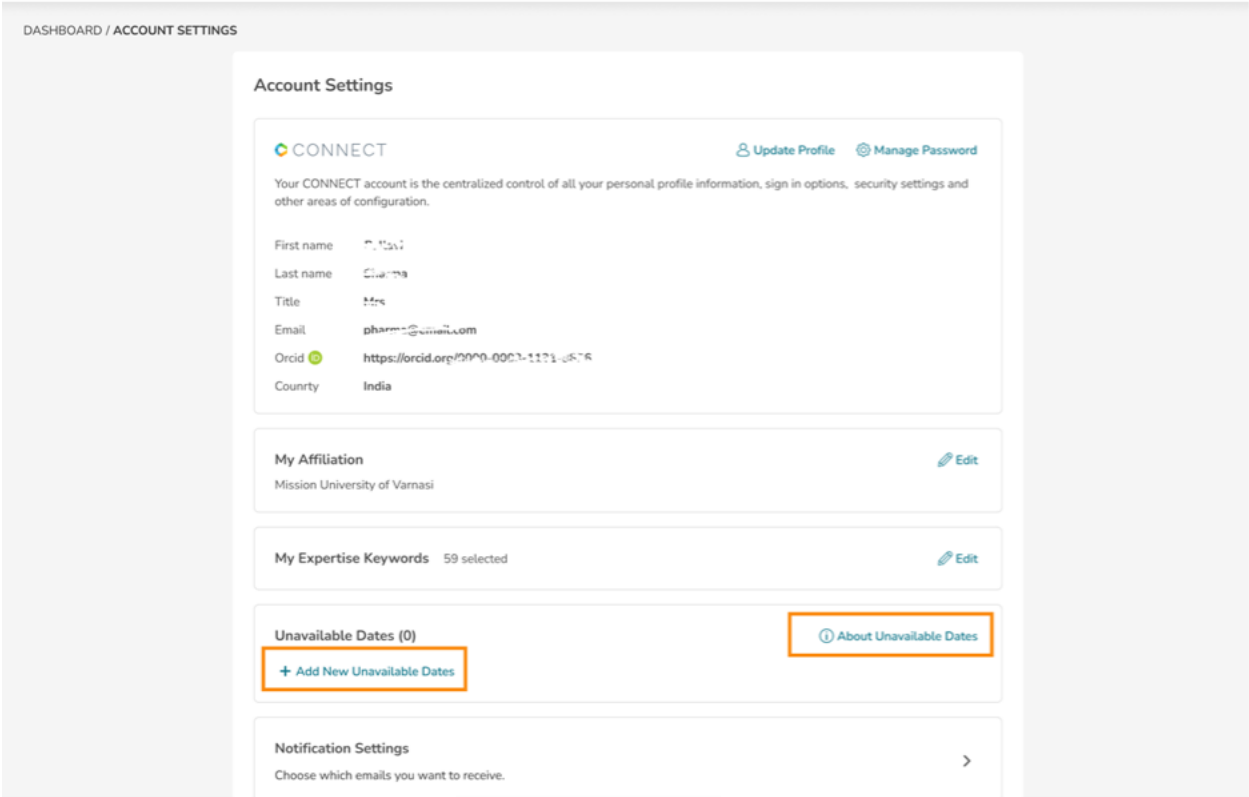


Dates entered

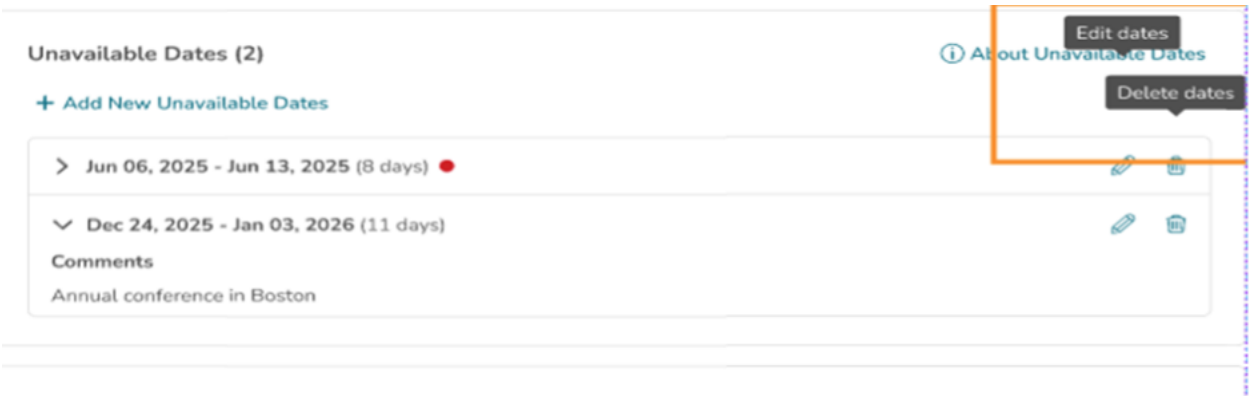
Red dot indicates Editor is currently unavailable



No dates entered

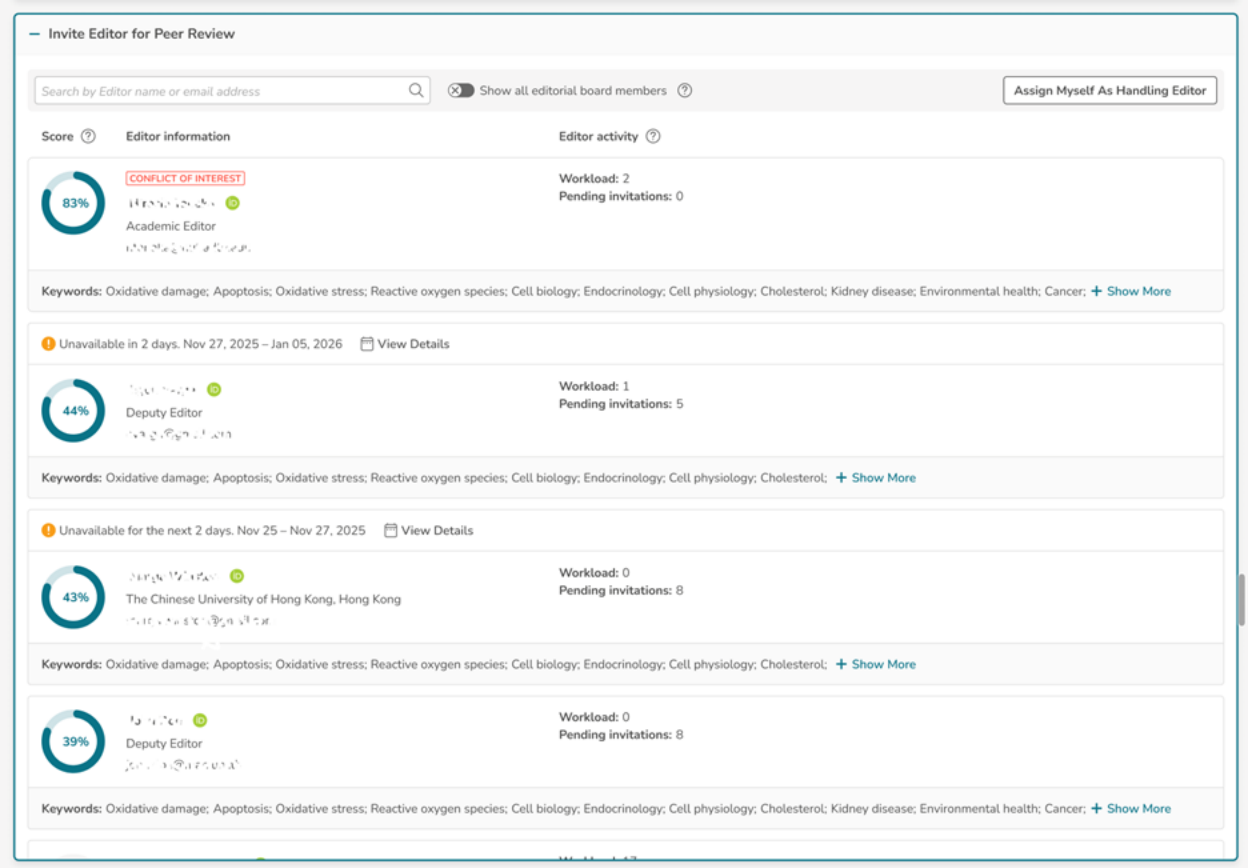


Can edit and/or delete previously entered unavailable dates

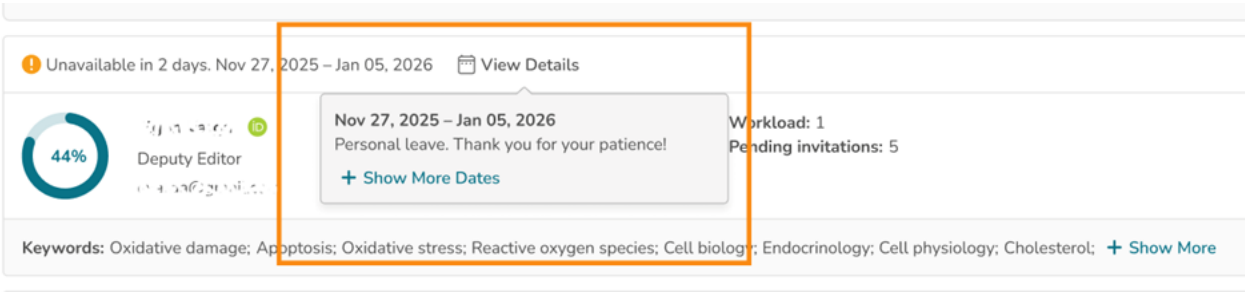


Assignment Screens

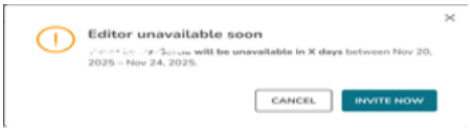
Availability indicator appears in Article details page



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

- Filter submissions by assignment teams and roles.
- Real-time counts for teams and individual specialists.
- Lead Specialists clearly marked with the ‘LSP’ abbreviation.
- Counts dynamically update based on manuscript conditions.

Contextual Escalation Distribution

- 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.

- 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

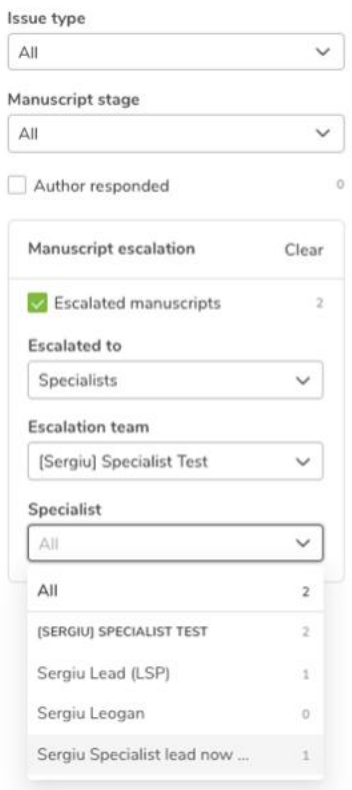
Specialists

Escalation team

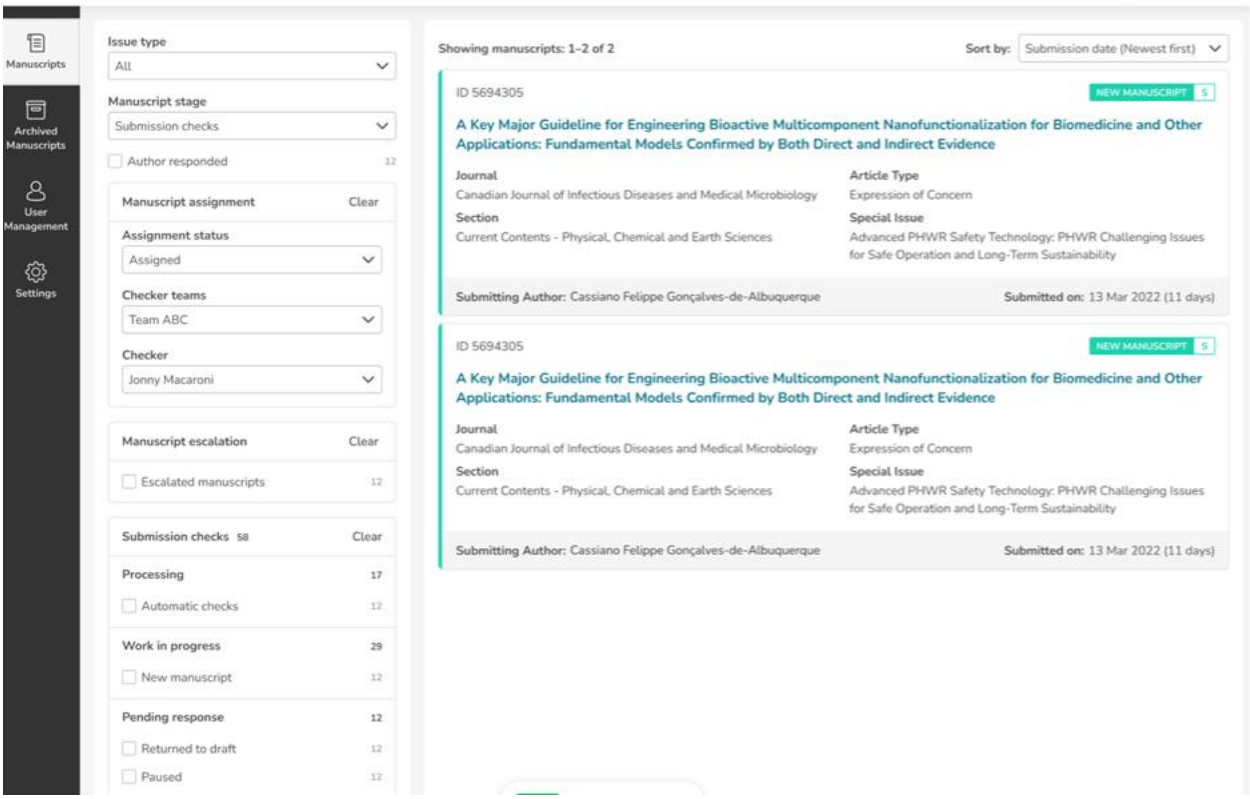
All

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

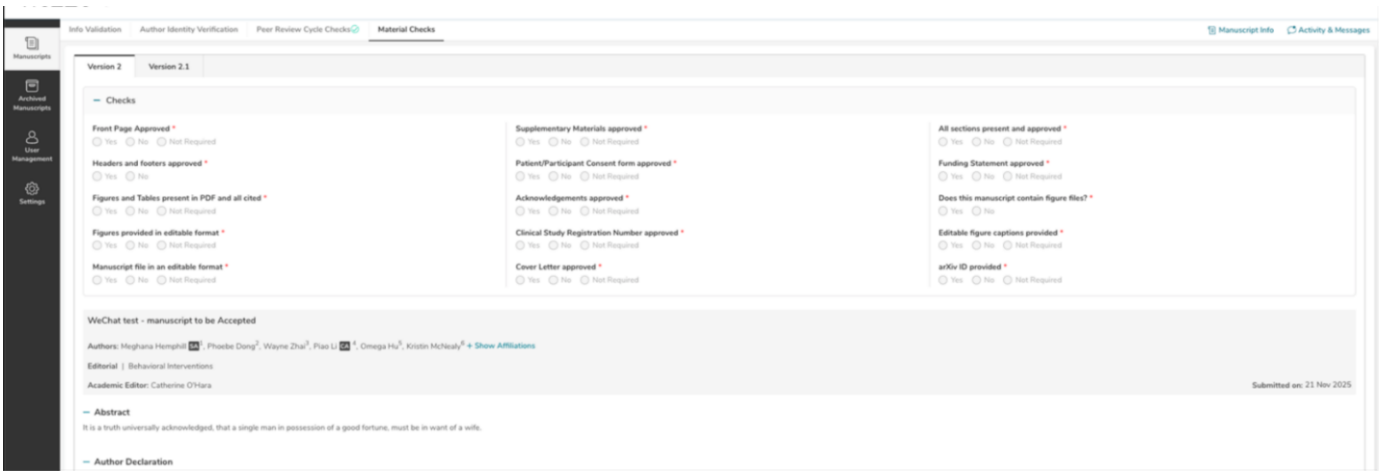
Available from	3-December-2025
Impacted Module	Research Exchange **Screening**
Impacted Roles	Screening Users
Overview	When a manuscript enters the Materials Check flow with a new minor version (e.g., after a *Request Files* action), previously selected radio button answers will be displayed in the UI. 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:
  - **Previously selected radio button answers** will now be visible.
  - Any **associated free-text responses** will also be displayed.
- All displayed inputs on previous versions are **read-only**:
  - Radio buttons and text fields are **disabled (greyed out)**.
  - 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

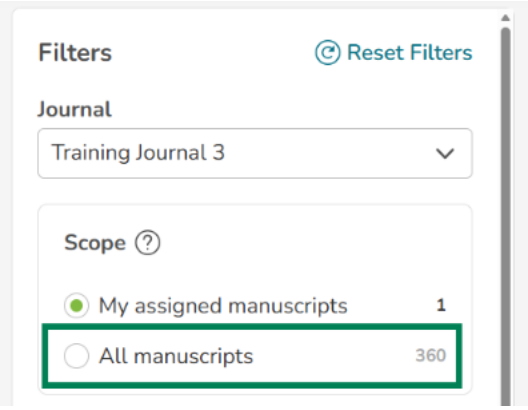


Dec-2025: Full Access Editor Capability

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.

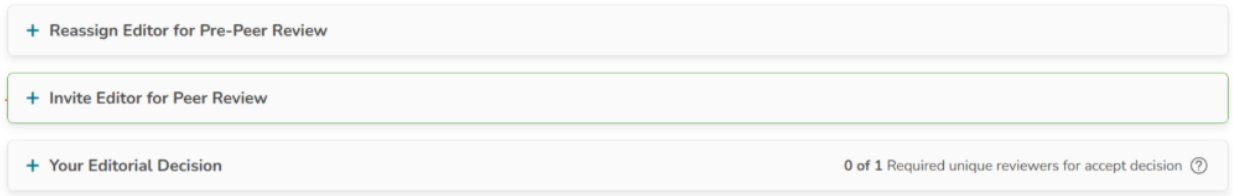
Full Access Editors **can**:

- 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)
- Make decisions before and after peer review at each stage in the process
- Invite reviewers and manage reviewer assignments and deadlines
- 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)
- Participate in manuscript conversations using the conversation tool
- View all actions taken in the activity log for transparency/traceability. Emails sent will be signed with the Full Access editor's name

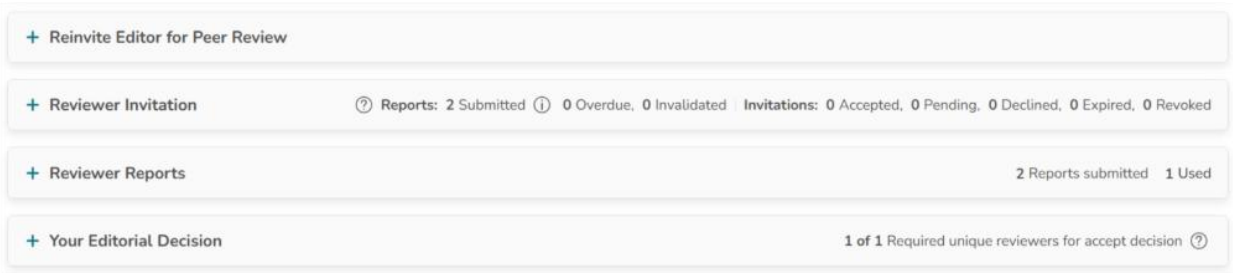
Full Access Editors **cannot**:

- 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

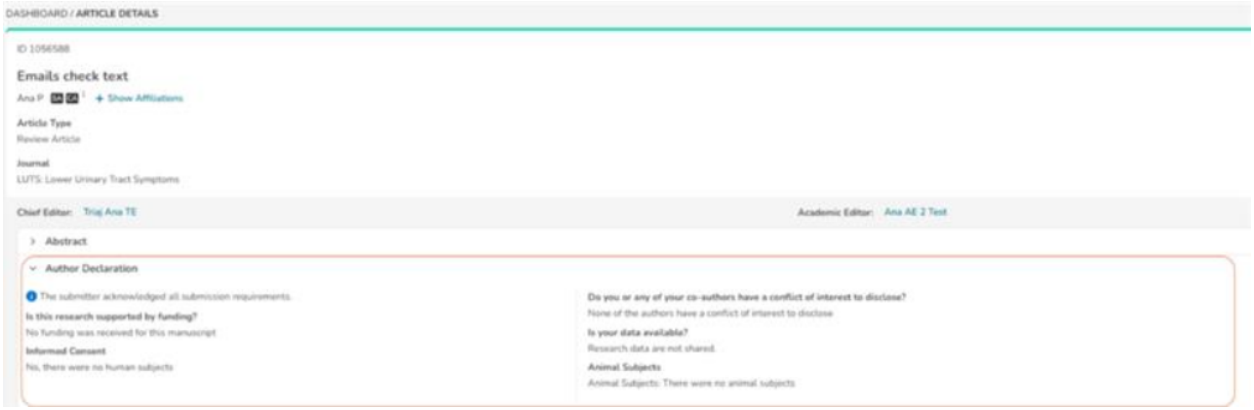
- **Double Anonymous Reviewers** will no longer see responses to:
  - "Is this research supported by funding?"
  - "Do you or any of your co-authors have a conflict of interest to disclose?"
- **Single Anonymous Reviewers** retain access to this information to identify potential conflicts.
- The data availability statement remains to all Reviewers
- Emails are unaffected by this change

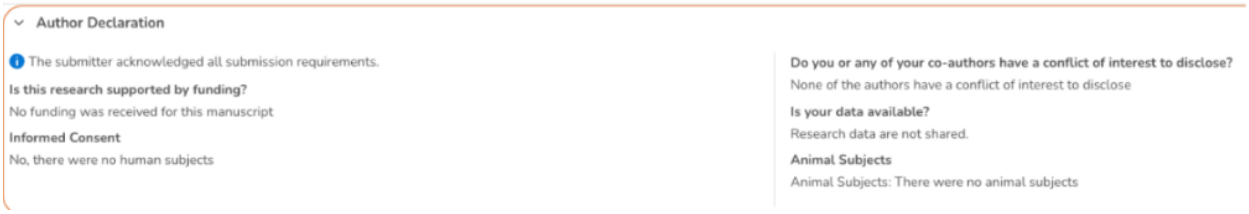
Hide Submission Questions

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

Author Declarations Tab

- For double anonymous reviewers:
  - Funding and COI responses are hidden
- For single anonymous reviewers:
  - 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.

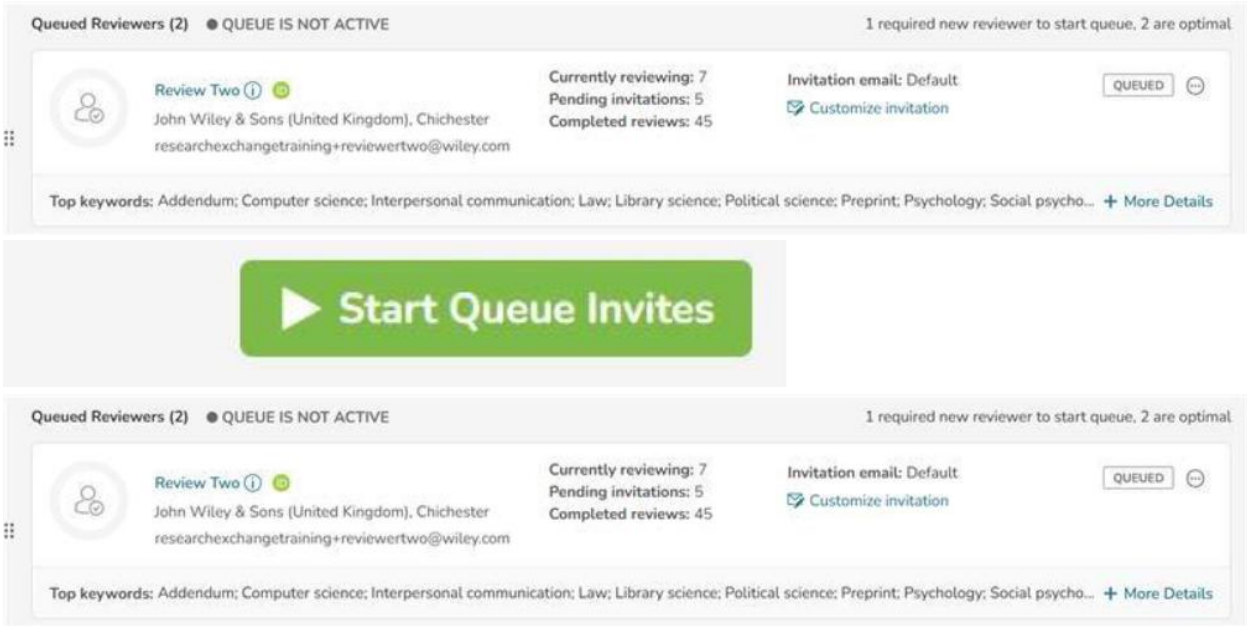
Queue Numbering

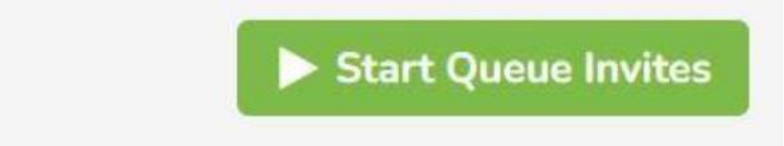
- The queue is numbered, so editors can easily identify the order in which reviewers will be invited.

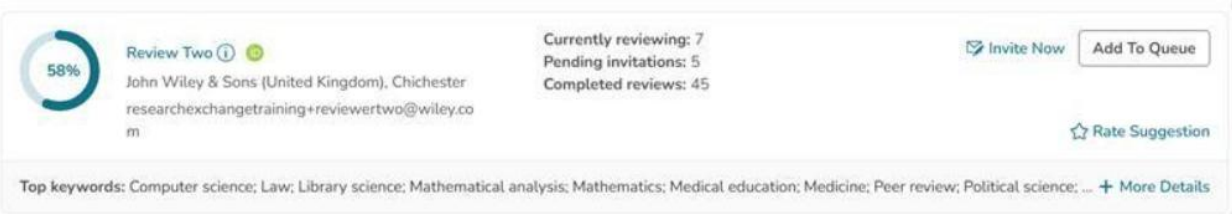
Re-invite Reviewer Button

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

- 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.



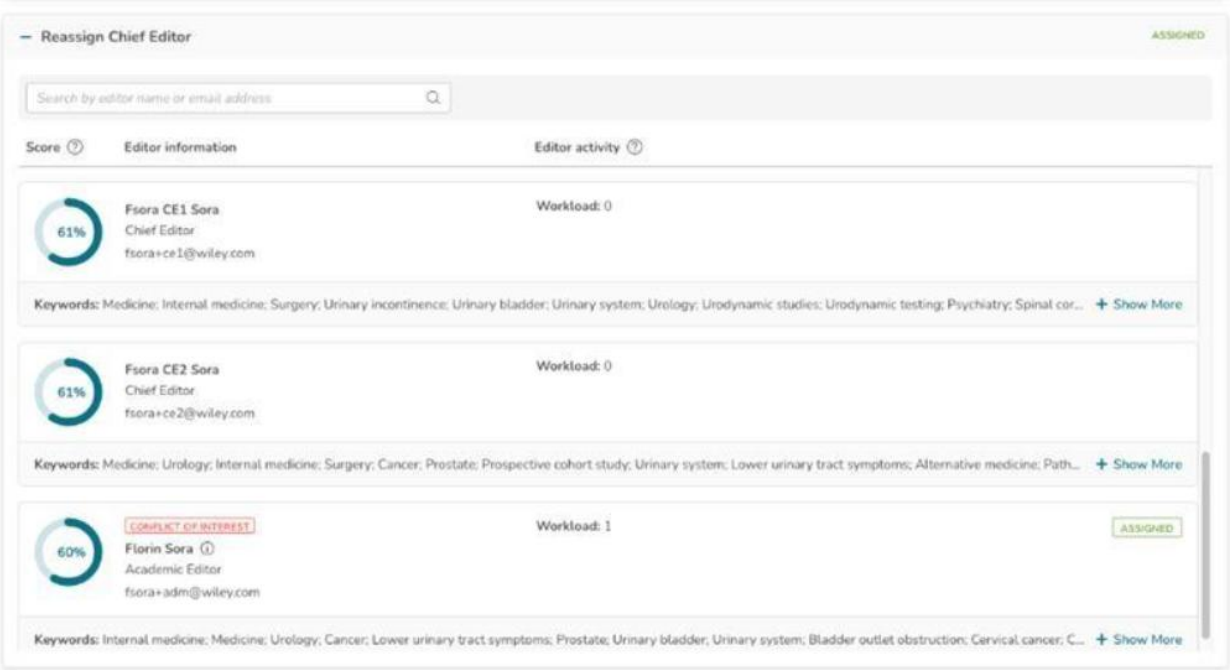


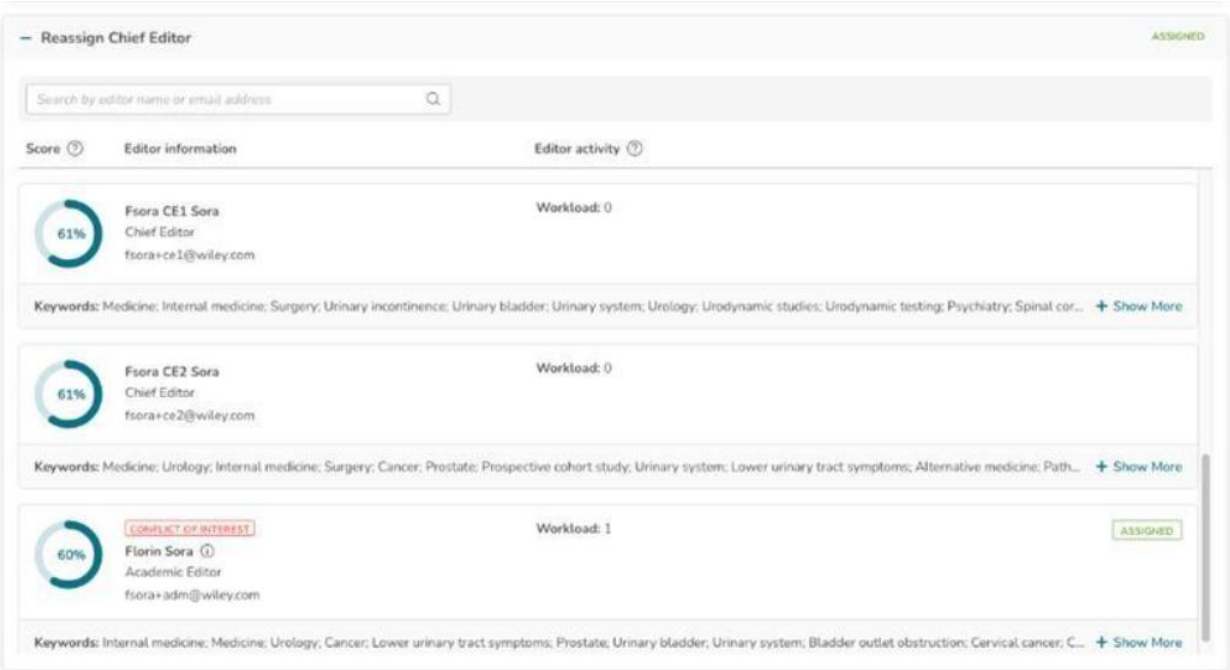


Nov-2025: Show Keywords in the UI for Journals that have PKG for Editor Suggestion Enabled

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.

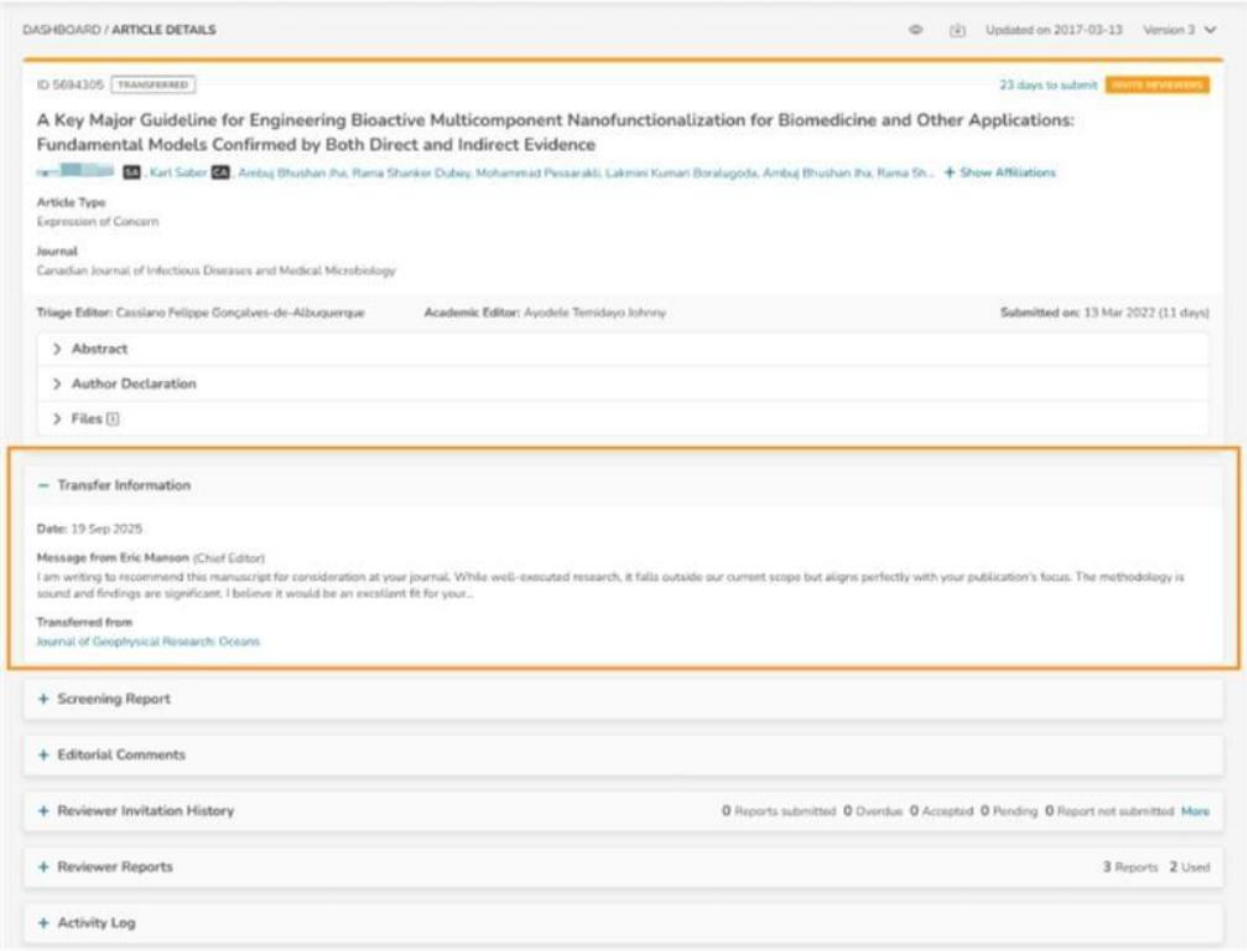
Key Features

- Display Transfer Context for Destination Editors
  - 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

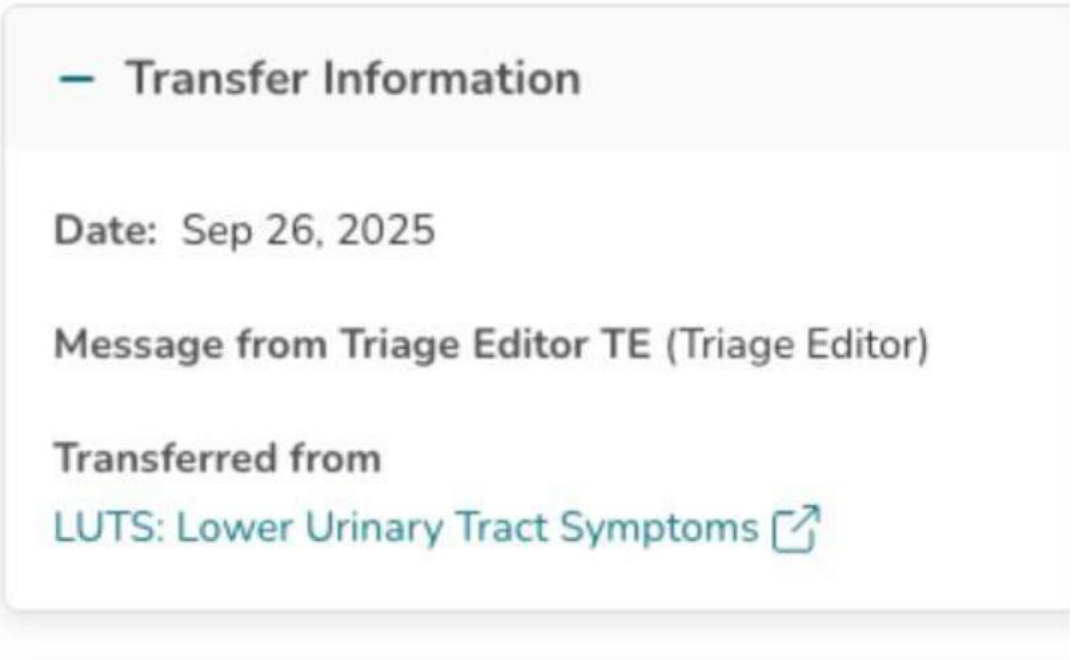
- Dashboard – Article Details page (Review)
- Adds a Transfer Details panel for transferred manuscripts into the Manuscript Details page.
  - Panel is collapsible and will always appear first in the list of collapsible panels.
  - Panel is open by default
  - If user collapses the panel, it will not be expanded if that user refreshes that page on the manuscript.
  - Panel appears only for manuscripts with a transfer history.
  - 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]
  - Information on panel is read-only; cannot be edited.

Transfer Information panel in Review



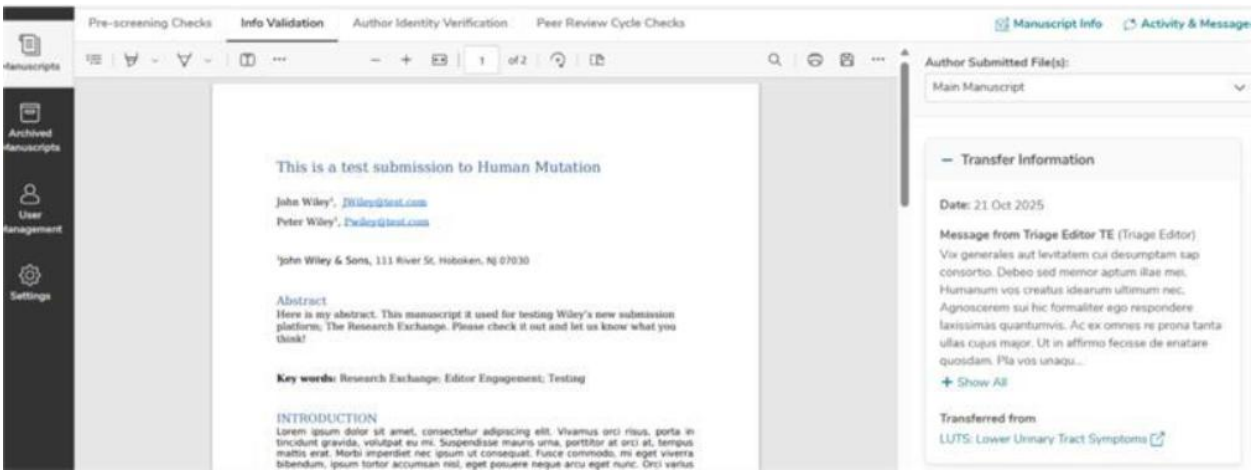
No Information Sent from Previous Editor



Dashboard – Info Validation Tab (Screening)

- Adds a Transfer Information panel for transferred manuscripts into the Info Validation Tab
- Panel appears only for manuscripts with a transfer history.
- 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]
- Information on panel is read-only; cannot be edited.

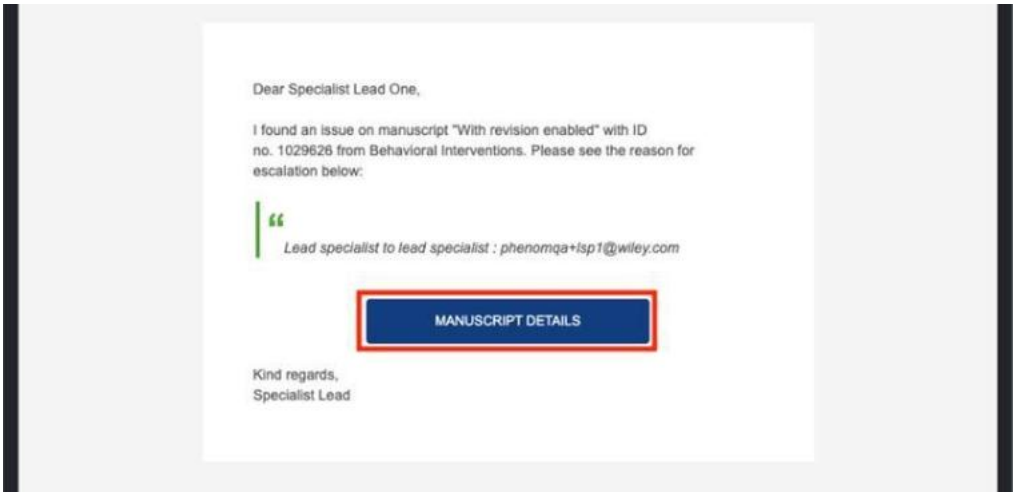
Transfer Information panel in Screening



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.



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.

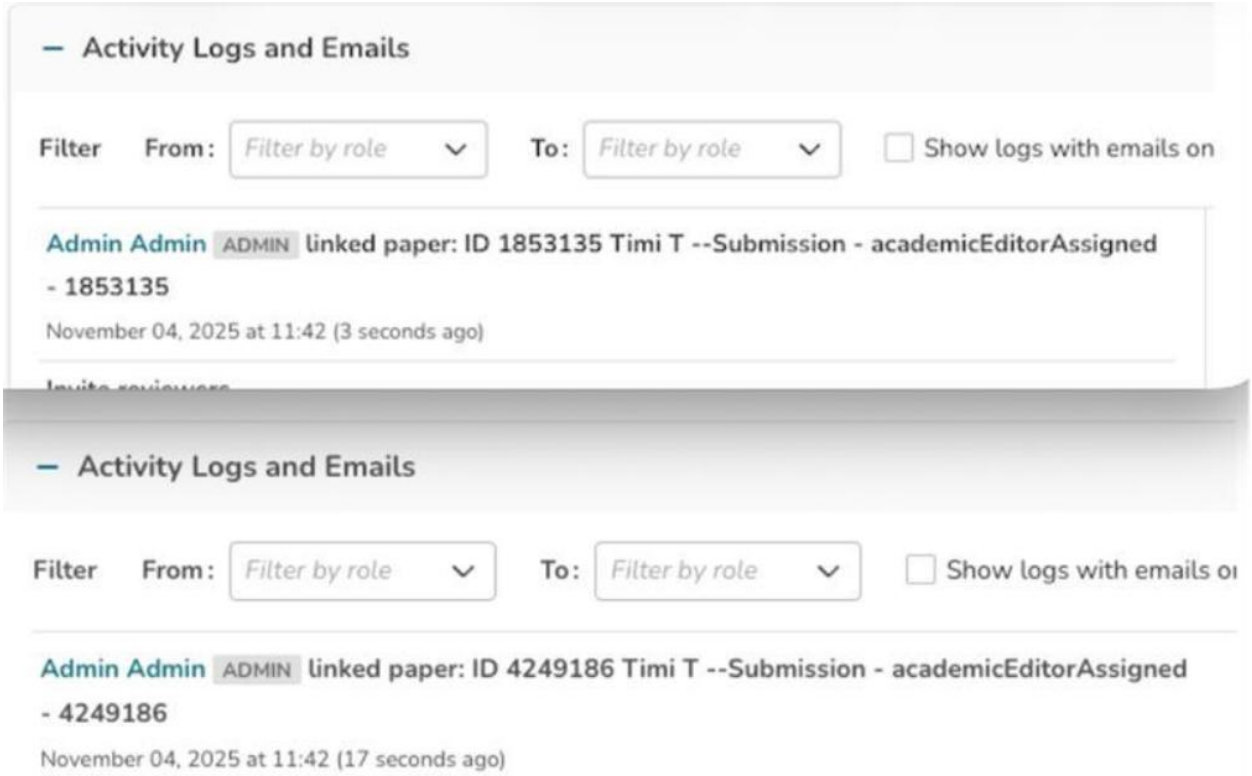
Key Features

- **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

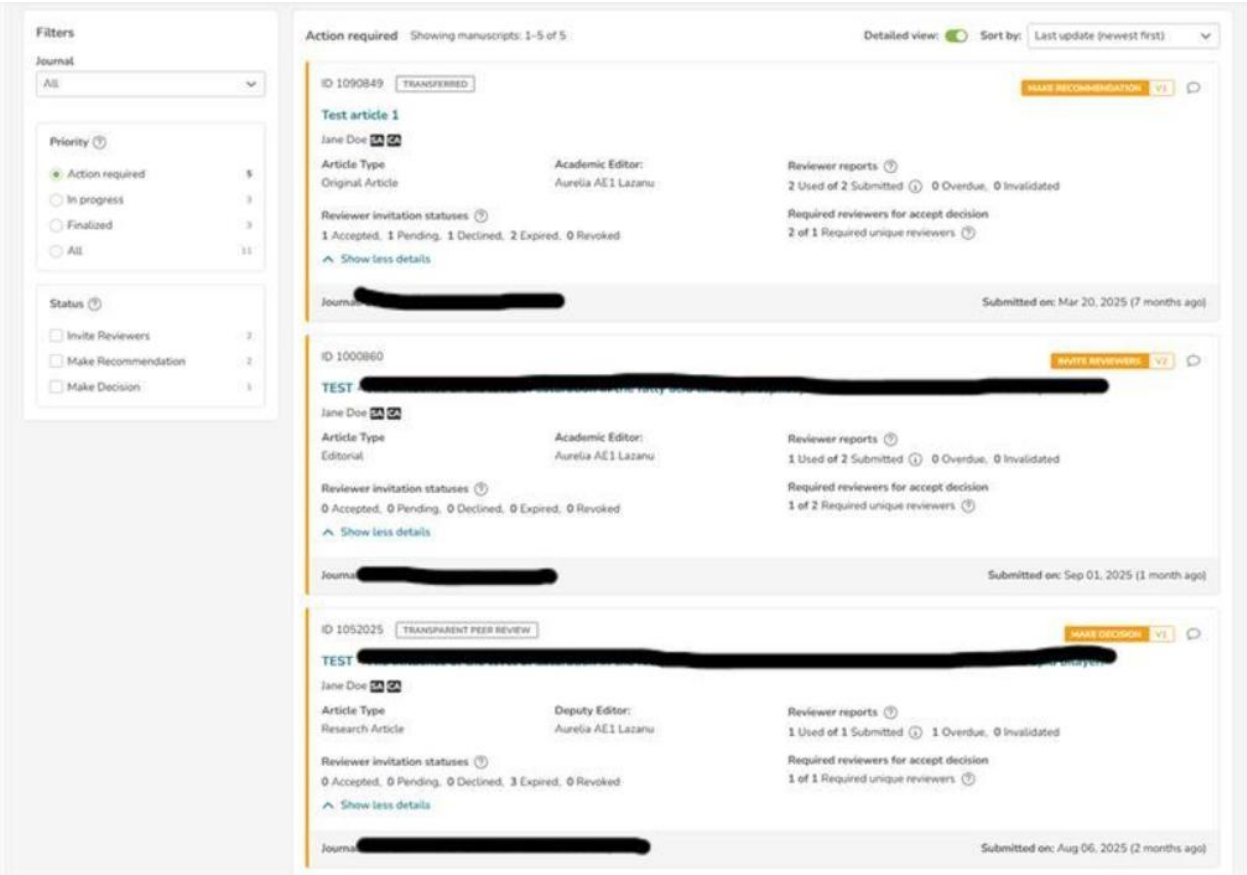
Available from	20-October-2025
Impacted Module	Research Exchange **Review**

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)

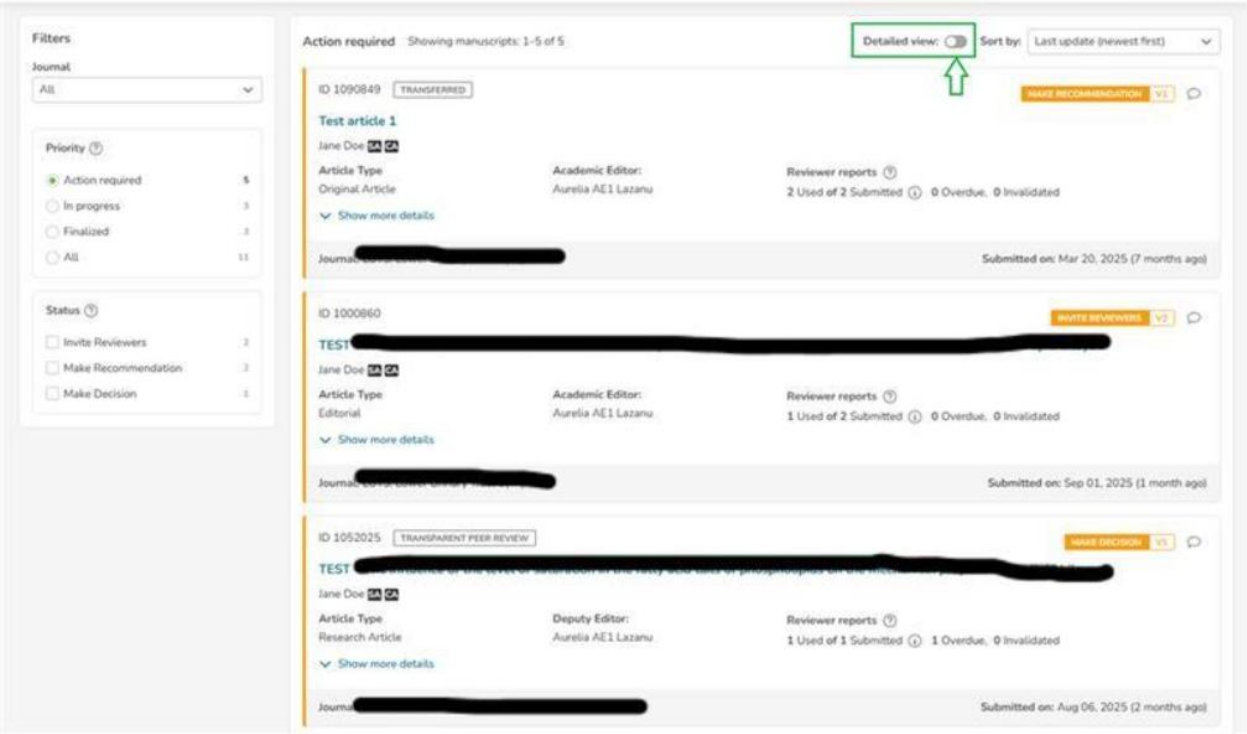
Editor dashboard listing three manuscript cards. Each card displays the three categories of metrics listed above



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

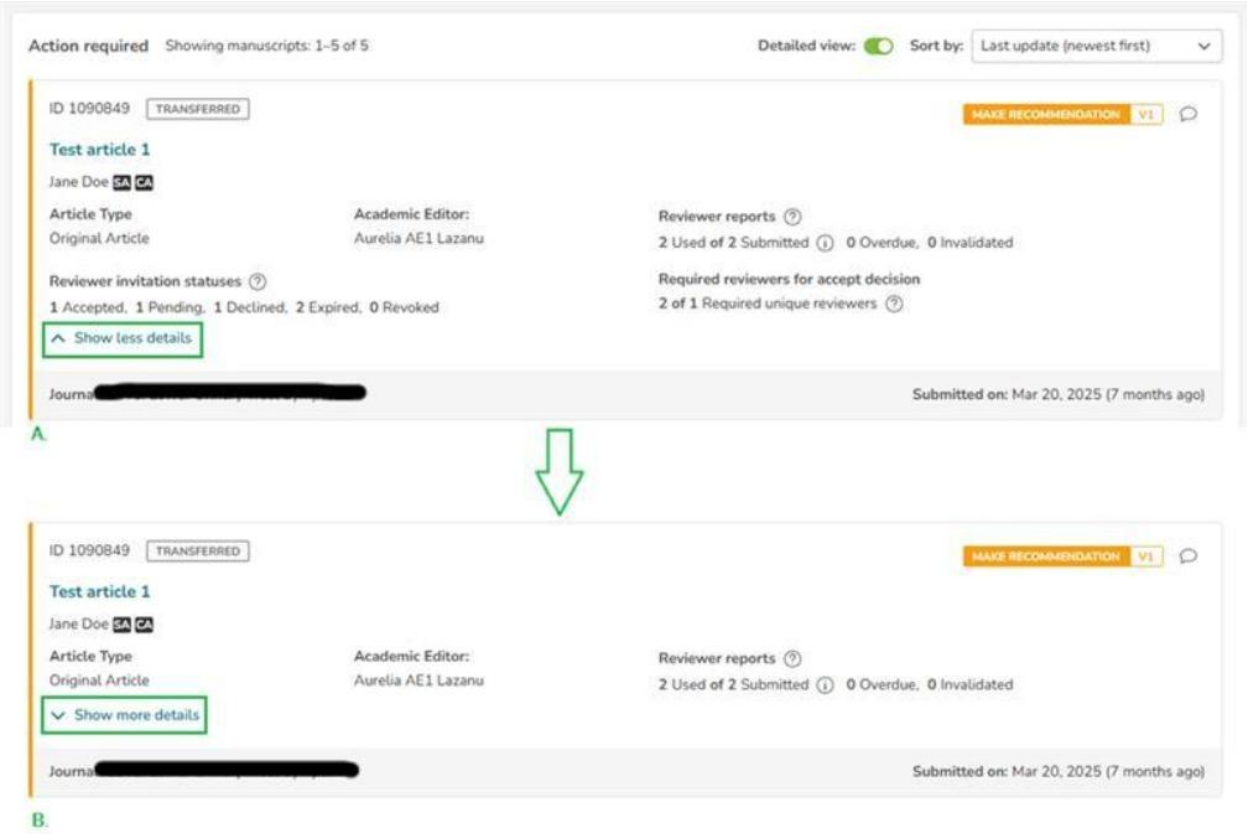
- They may hide the other two categories across the board in one move by turning off the ‘Detailed view’ toggle at the top –right of the dashboard, near the ‘Sort by’ function

‘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.

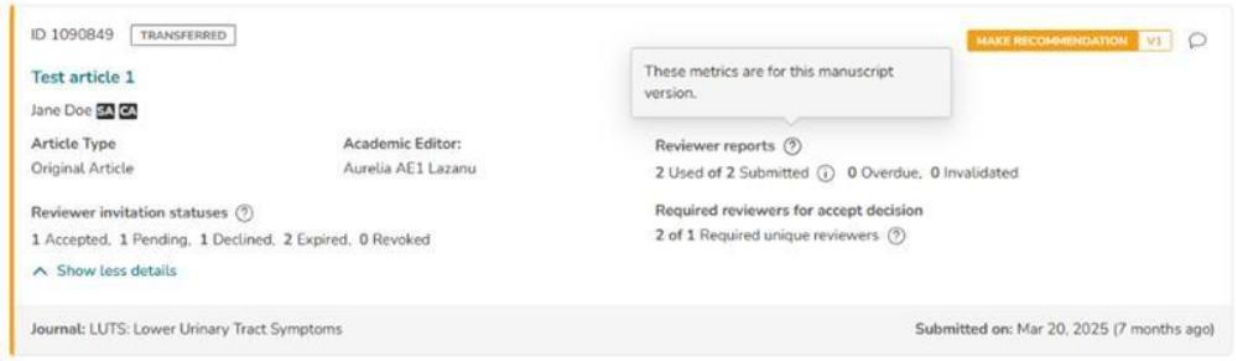


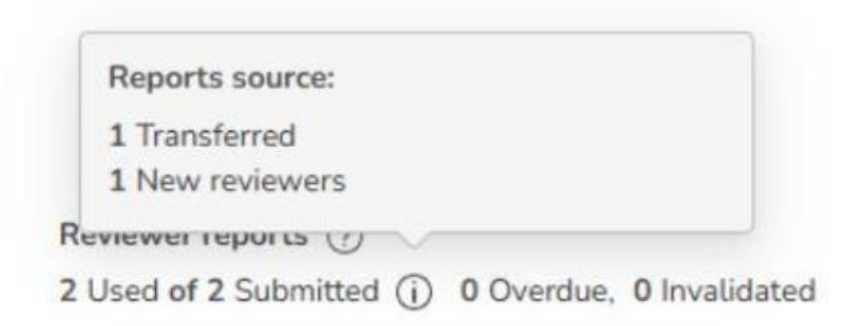
Reviewer reports (metrics for the current manuscript version)

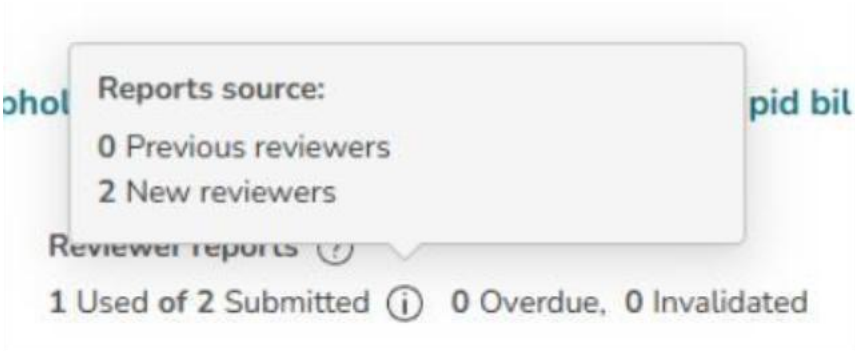
These metrics offer information on reviewer reports on the current version, combining the following sources:

- **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.

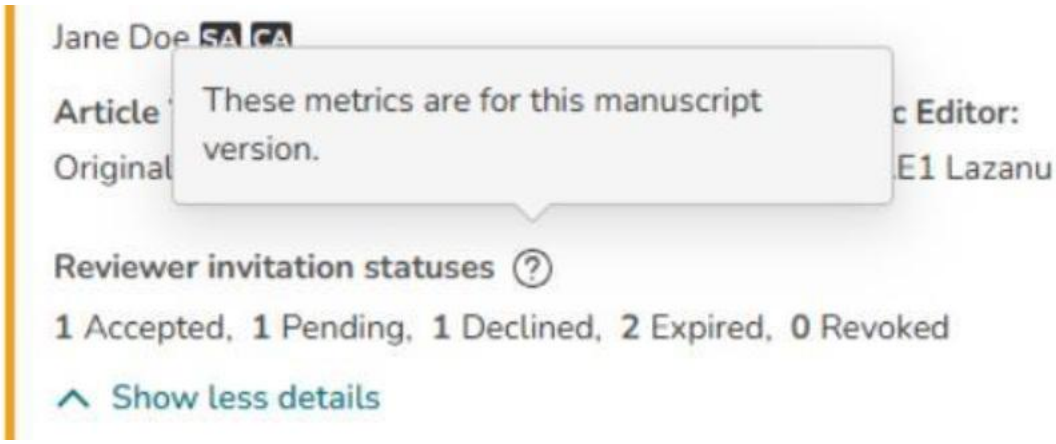
Reports from ‘Previous reviewers’ can only exist on revisions, where reviewers that reviewed previous versions can be re-invited on the current version.

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)

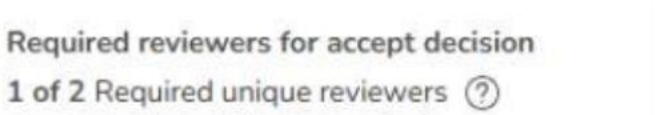
'Reviewer invitation statuses' metrics on the current version.

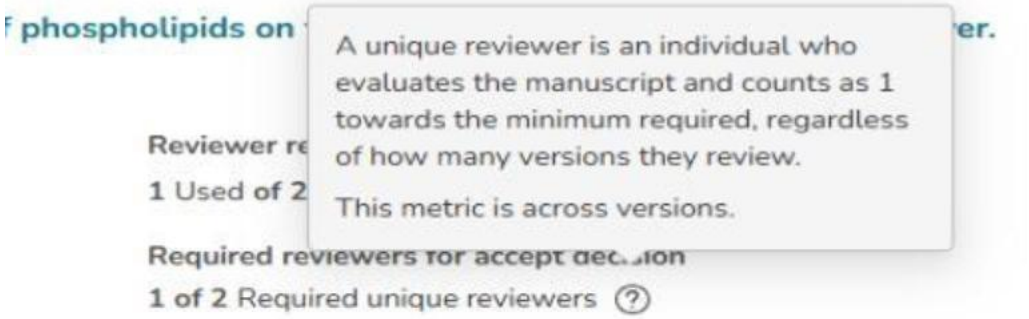


Required reviewers for accept decision (metrics across all manuscript versions)

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.



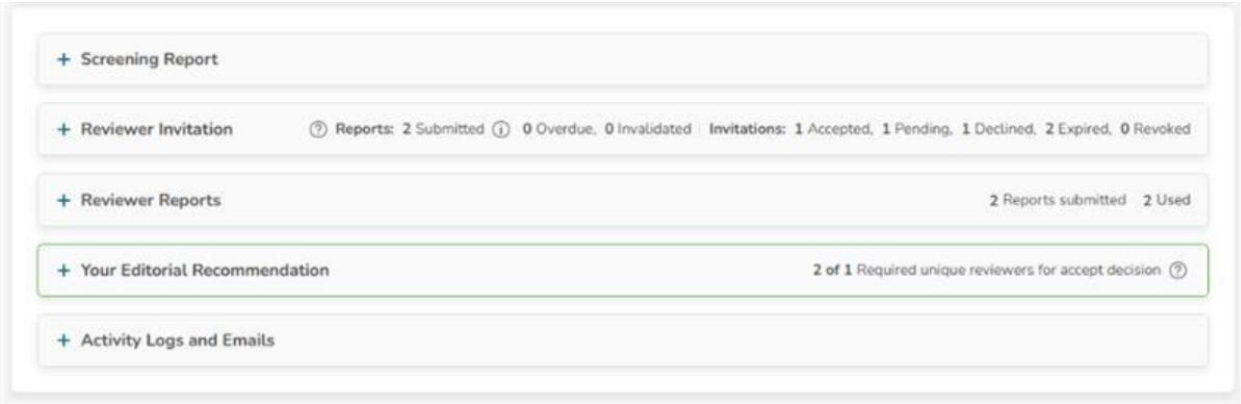


Manuscript Details Page Updates

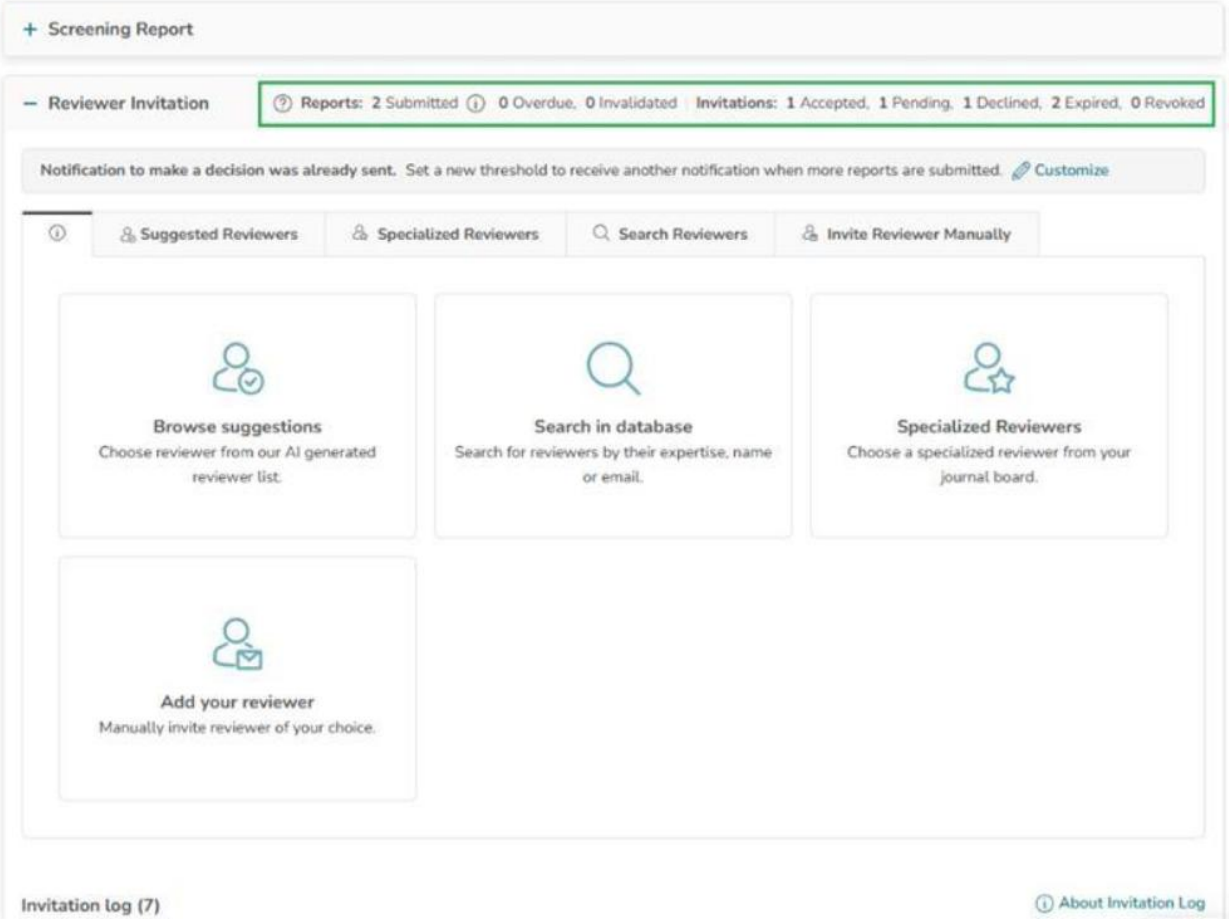
The information displayed on the manuscript card in the three categories detailed in the first section correlate with information displayed in the Manuscript Details Page, accessed after clicking on a manuscript card (Fig.7):

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

A A
aapetrei+r3@wiley.com

Invited: May 28, 2025
Expired: Jun 18, 2025

UNSUBSCRIBED

Keywords: no keywords available. + More Details

— 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

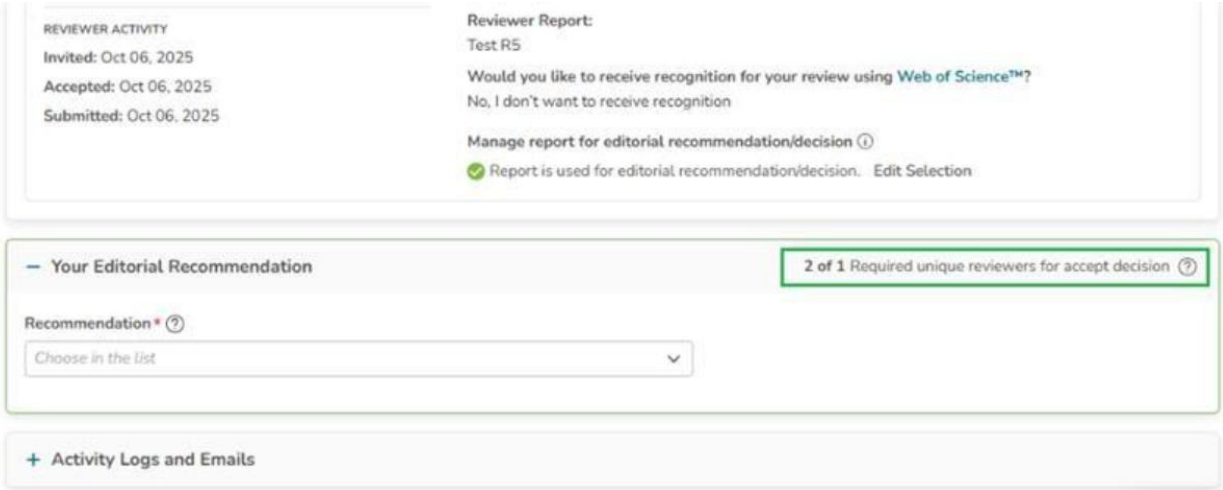
Recommendation:
ACCEPT

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.

Profile Settings

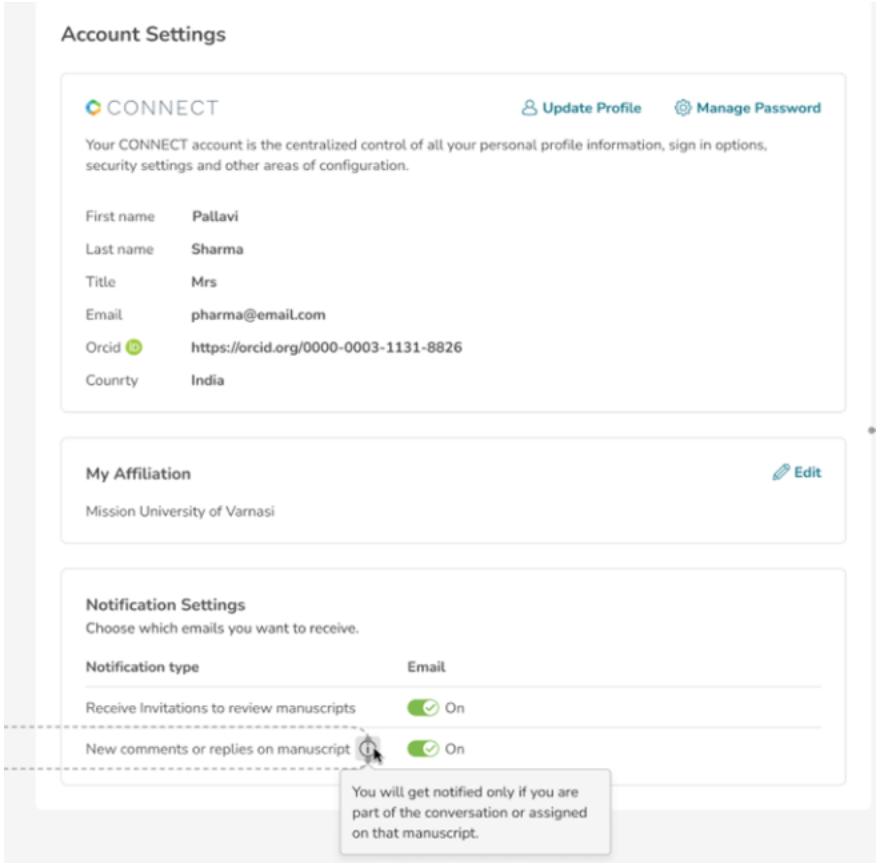
A new section in the editor profile allows self-management of email preferences at any time.

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

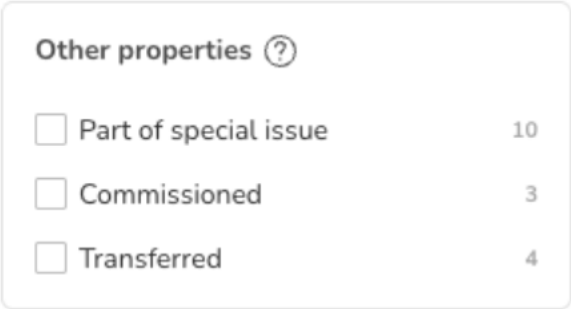
Key Features

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:

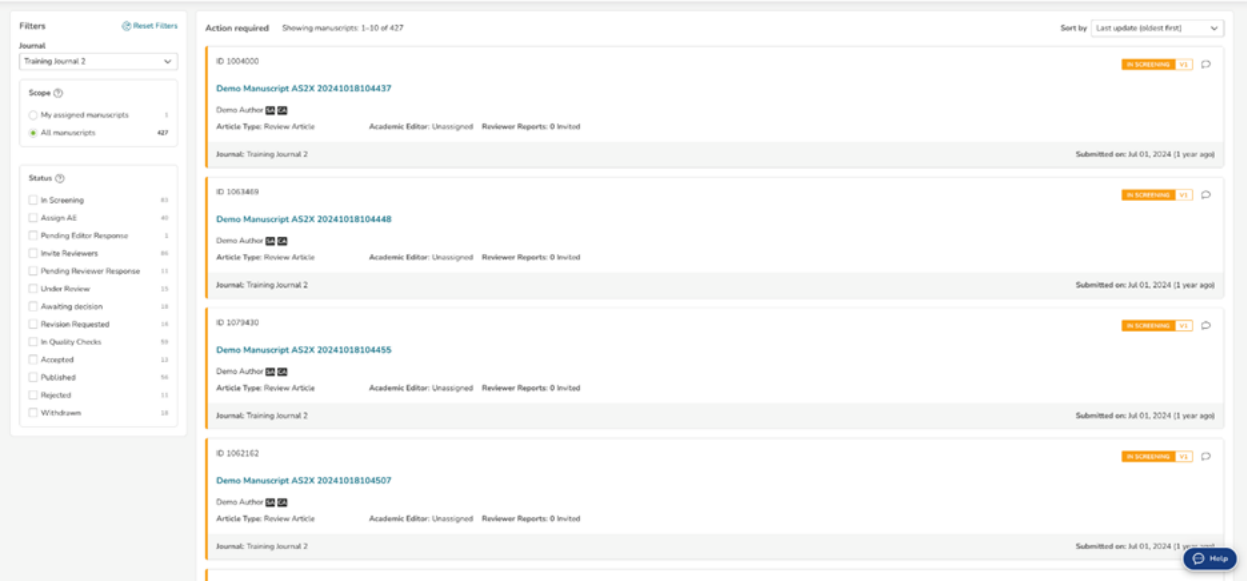
- Other properties: This component includes 3 states that a manuscript may have: Part of special issue, Commissioned and Transferred. Similar to the above, this component will only be shown when the Editors have such manuscripts in their existing view. Example:



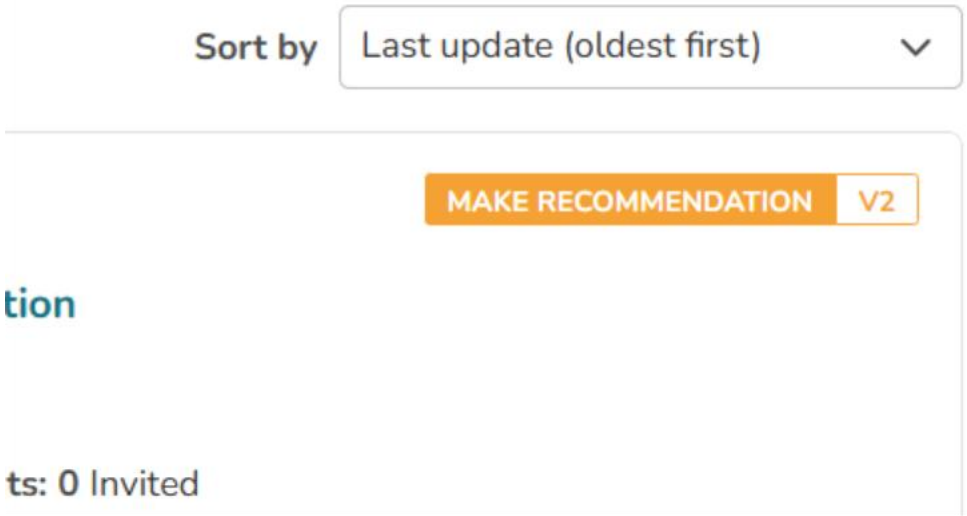
Additional Updates

- 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

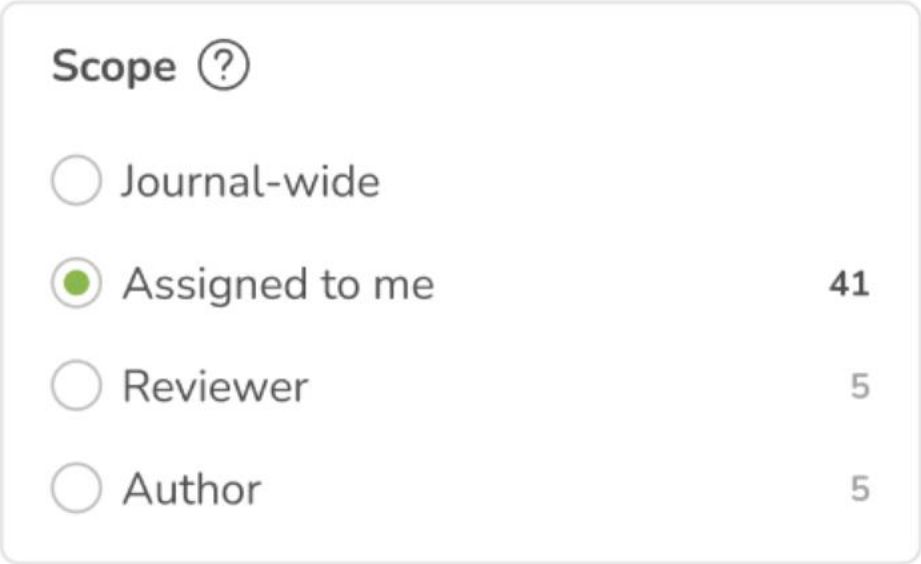
Additional filters added



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



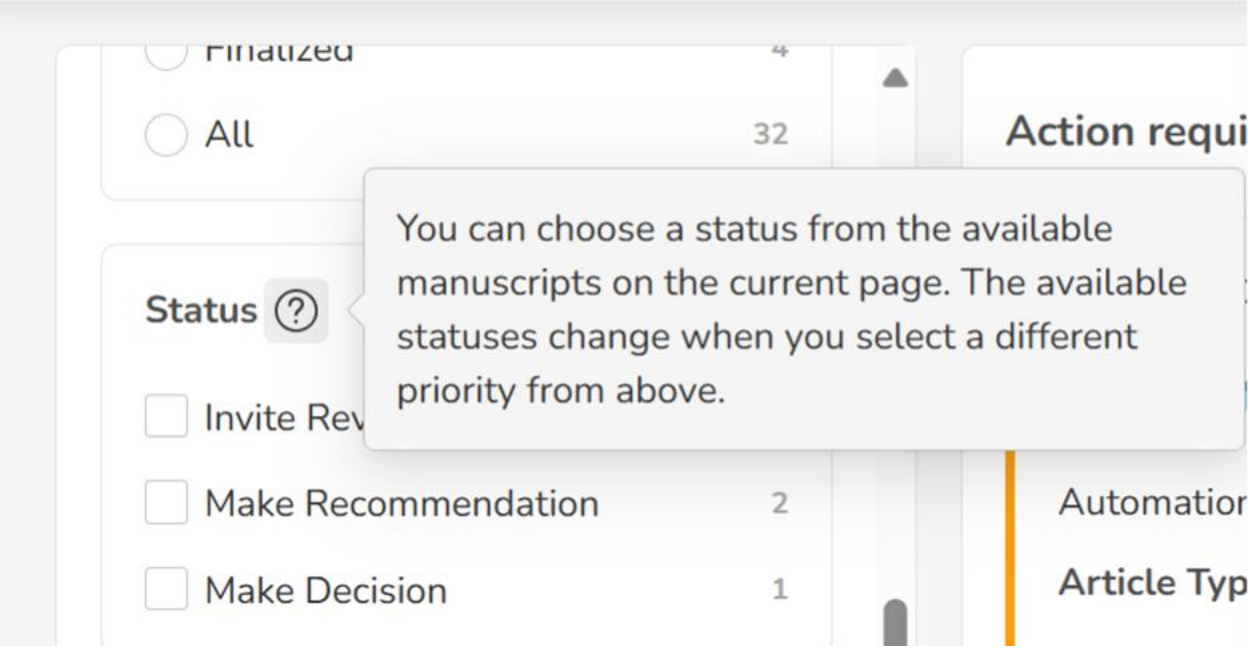
Editorial Oversight Filter



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.



Status

- Invite Reviewers 13
- Make Recommendation 2
- Make Decision 1

Action required

ID 3538403

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

Article type

- Original Article
- Review Article 4
- Book Review 3
- Short Communication 3
- Brief Communication 1
- Research Article 1

Reviewer Report

Journal: LUTS: Lc

ID 2122510

- Research Article 1

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

Other properties

- Part of special issue

Advanced Control Str

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.

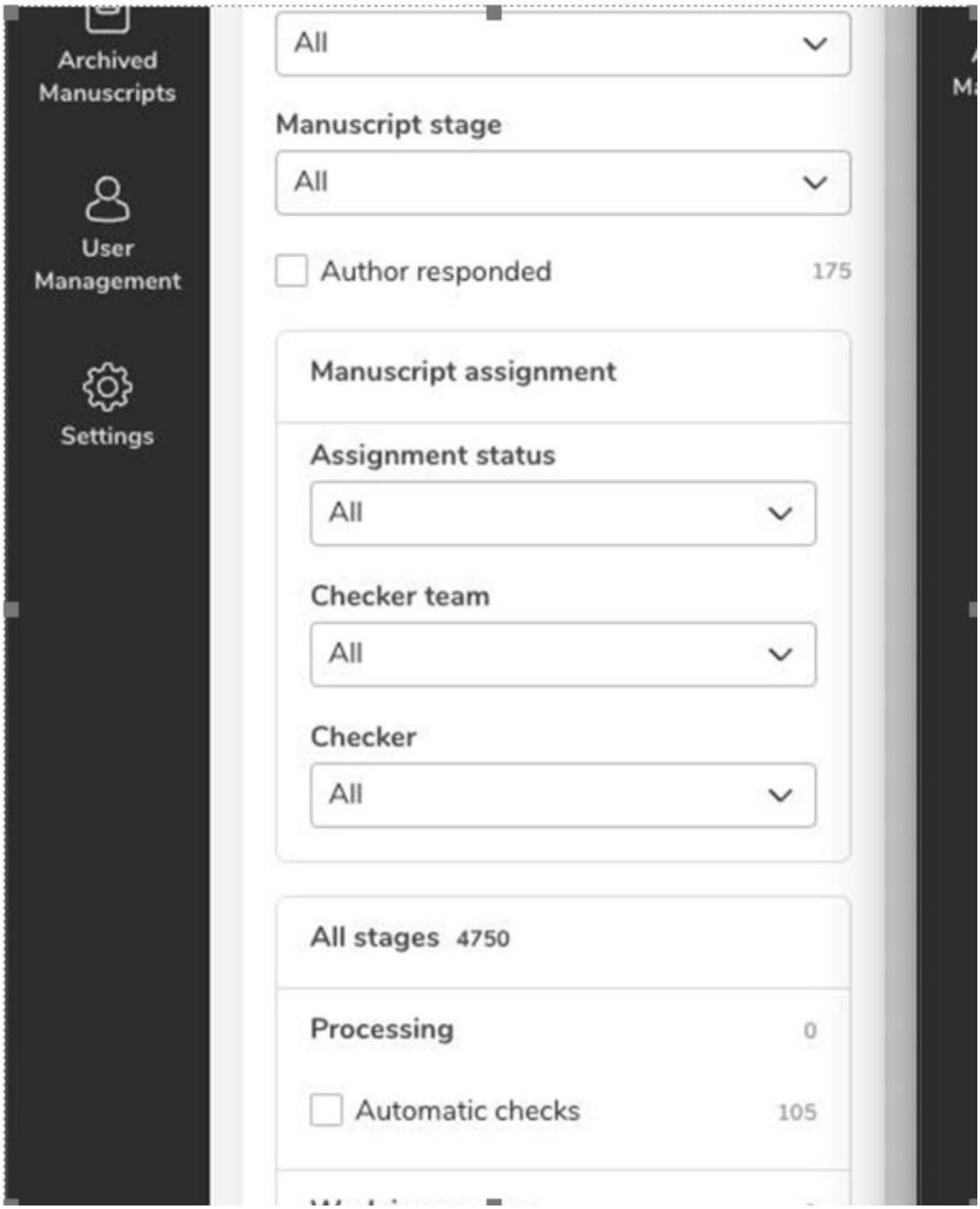
Key Features

- Team & Individual Workload Visibility
  - 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
  - Admins can filter by submission status (Assigned, Unassigned, All).
  - Lead Screeners see only assigned submissions (Assignment status filter hidden).
- Contextual Workload Analysis
  - Filters for manuscript type, processing stage, and status conditions.
  - Workload counts dynamically updated based on filter selection
  - Visibility into workload patterns under specific manuscript states (e.g., paused, returned to draft).
- Filter Management & Decision Support
  - Reset filters individually or all at once.
  - Immediate visual feedback and real-time data updates upon filter changes.

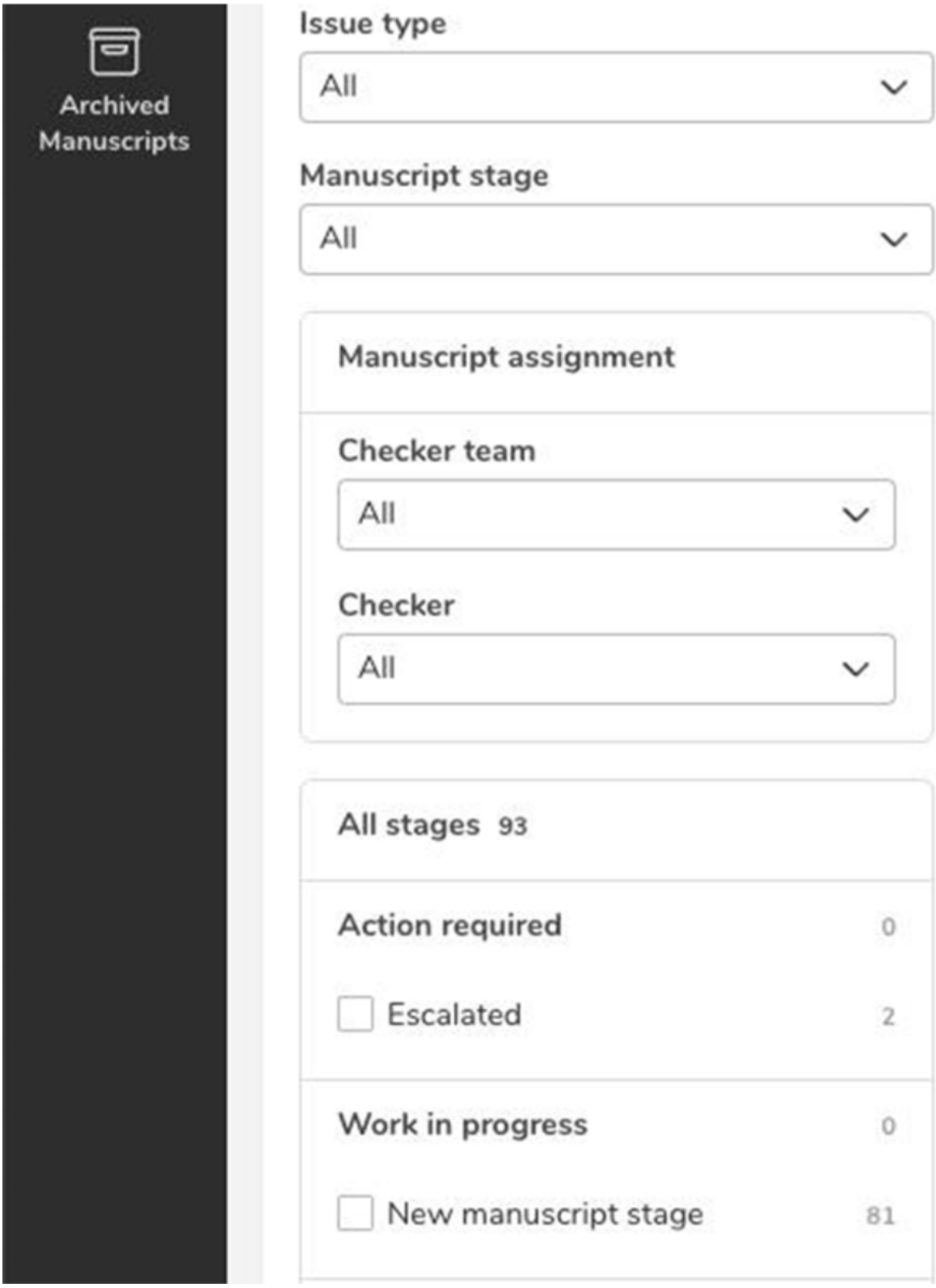
- Consistent filter state across analysis scenarios.

- New Filters Panel:
- Admin view includes Assignment status filter (All, Assigned, Unassigned).
- Lead screener view excludes Assignment status filter
- Workload Dashboard Enhancements:
- Teams displayed with clear delimiters; individual checkers grouped under respective teams.
- Dropdown for checkers hidden if no checkers exist in a team.
- Dynamic Count Indicators:
- Real-time updates when filters are applied or reset.

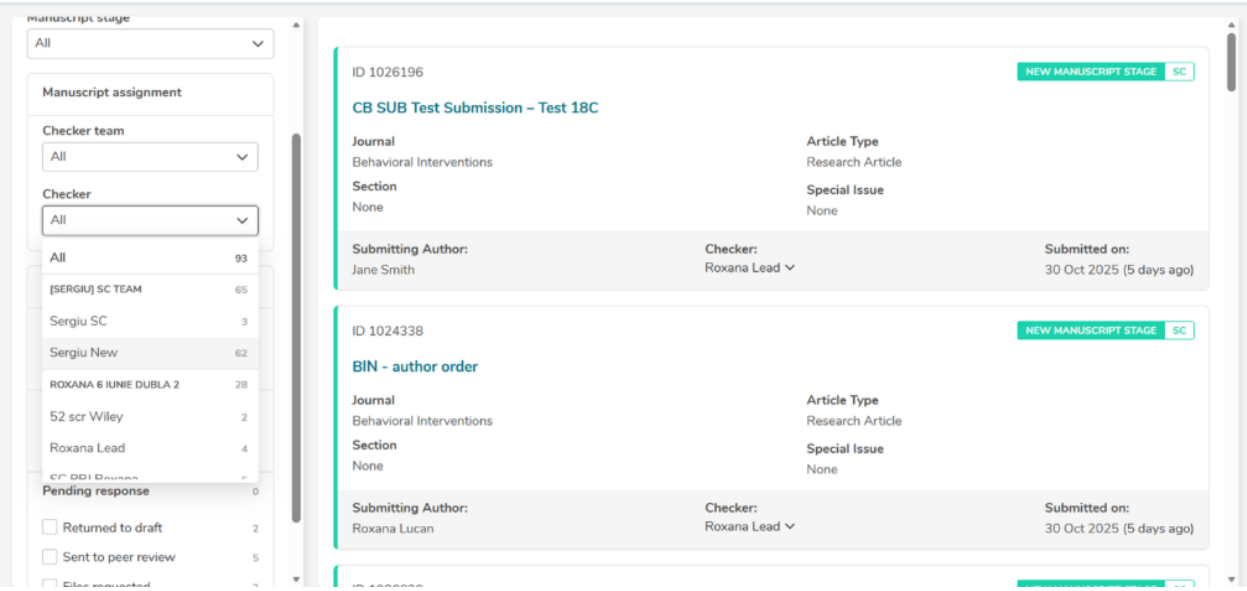
Admin View – Containing Assignment Status



Lead Screener View – Without Assignment Status

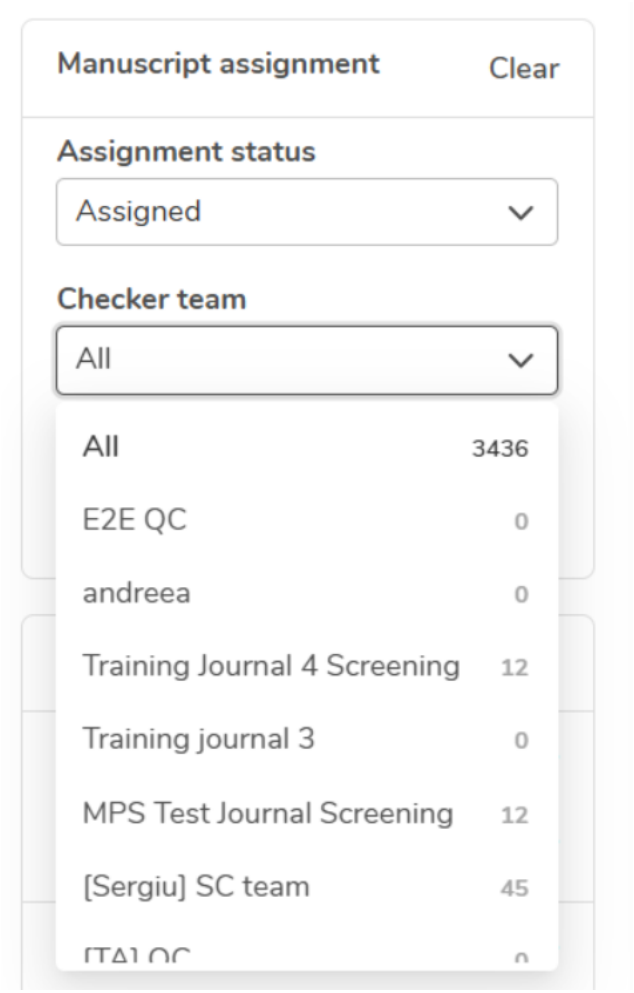

Archived Manuscripts
Issue type
All
Manuscript stage
All
Manuscript assignment
Checker team
All
Checker
All
All stages 93
Action required 0
Escalated 2
Work in progress 0
New manuscript stage 81

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

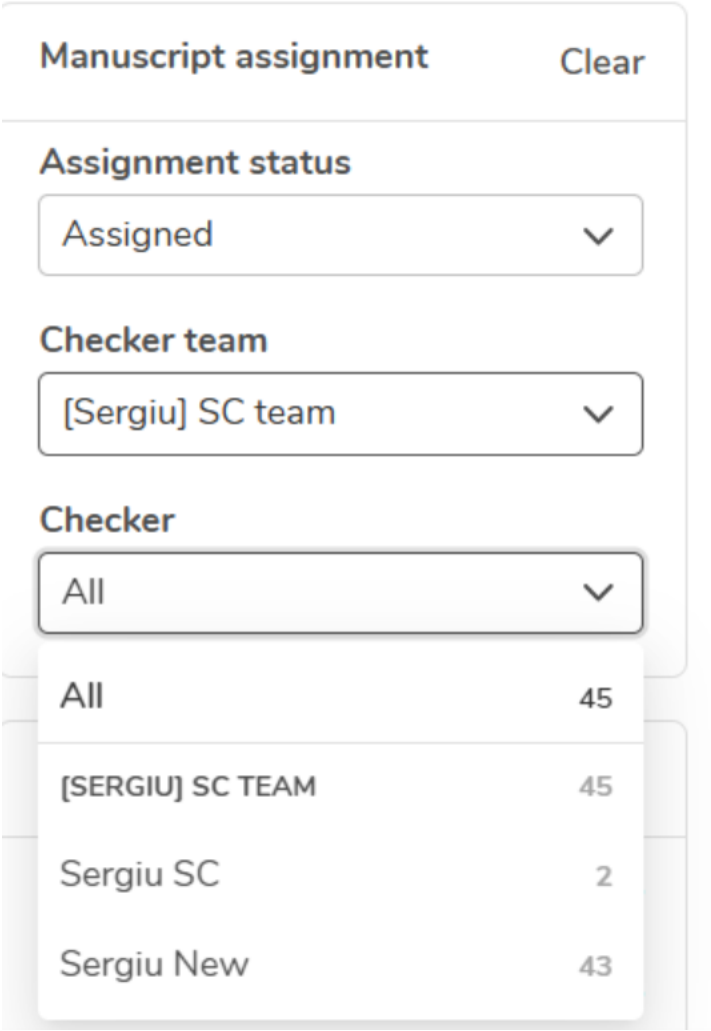


Checker Teams

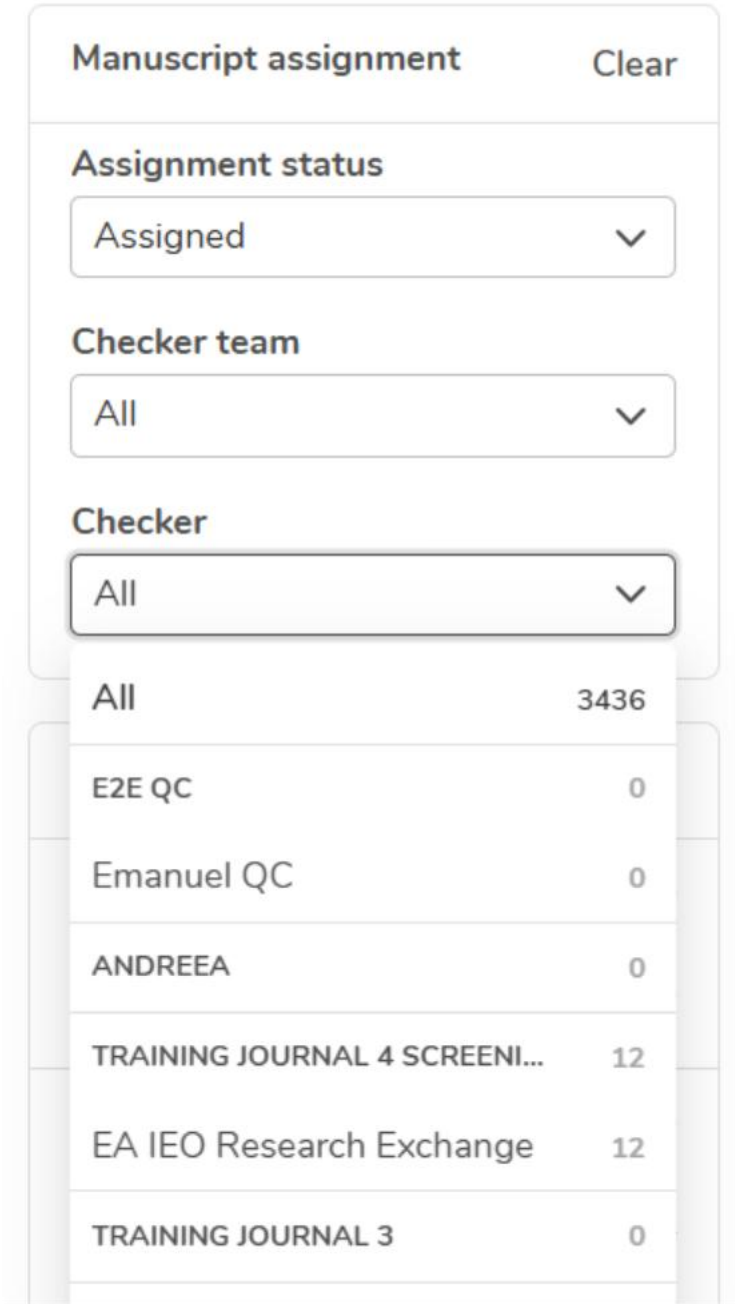
***NOTE**: If a Team only includes lead screeners, the papers they are handling will appear to be “unassigned”*



Individual Checkers on Selected Team



Individual checkers grouped by Team



Results Updated by Application of Filter