



CASE STUDY

Editorial Manager®

AER Optimizes Resources Through Use of Workflow Solution

When the Virginia-based Association for Education and Rehabilitation of the Blind and Visually Impaired (AER) began looking for an electronic workflow system to help produce their conferences and publications, it had two main criteria: cost and flexibility. “We look for every way to minimize expenses and we wanted to use the same system for multiple purposes,” explains Ginger Croce, Director of Membership & Marketing.



The AER has about 4,700 members and represents people who work with those who are blind or visually impaired. “So our members are orientation and mobility specialists, teachers of the visually impaired, vision rehabilitation therapists, low-vision therapists and university professors who teach those topics,” says Croce. “Some are optometrists, some are ophthalmologists, but primarily they are educators and rehabilitation specialists.”

Seeking Solutions

As part of its mission, the Association produces the quarterly peer-reviewed *Insight: Research and Practice in Visual Impairment and Blindness*, which runs research material of interest to people concerned with services to individuals of all ages with visual disabilities, including those who have multiple disabilities or who are deaf-blind.

Until 2008, production of *Insight* (formerly the *AER Journal*) had been largely a manual process and had been outsourced to another company that used volunteers. This method proved unwieldy over time, and unfortunately the journal did not appear on a regular basis. So the Association decided to bring the process in-house and to seek out an electronic system that could also be used by the authors and reviewers of conference papers and books published by the AER.

The AER executive director evaluated proposals from three different vendors before choosing Aries Systems’ software-as-a-service (SAAS). “Based on price and the types of services offered, Aries’ Editorial Manager® (EM) was the best value,” says Croce, who joined the AER three years ago as part of the reinvention of the journal.

Implementation

Croce says she did not have any particular concerns about the implementation. “It was all brand new to me and I had never worked with a journal before, or an online submission process.” But she acknowledges that she initially underestimated the time commitment needed for the Aries training program. “The training was fine and they walked me through it, but initially I wasn’t getting it,” she says.

“Finally, it clicked—it’s all about who has control of the document or whatever it is that’s being submitted. Once that dawned on me, I went, ‘okay, now I’ve got it.’”

These days Croce says she finds EM easy to use though she occasionally still spends time “hand-holding” with guest editors.

EM’s proxying capability allows administrators and specified editors to log in as other users and process transactions on their behalf. For Croce, this comes

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in handy when authors and editors who don't use the system on a regular basis need help.

The Revitalization Effect

AER used the introduction of EM in 2008 to revamp its whole approach to publishing the journal, including appointing a new editor-in-chief. After canvassing its members, the AER asked Deborah Gold, who works full-time as a researcher for the Canadian National Institute for the Blind in Toronto, to undertake the role in addition to her regular job.

"She has a lot of contacts worldwide so she's been the driving force in getting people to contribute," explains Croce. She also came up with the idea of 'theme' issues for the journal, which has proven very successful and popular with the Association's members, who receive the journal by mail or access it online. So for example, *Insight's* Summer 2010 issue was on issues related to children who are deaf and blind; and there are upcoming issues planned on falls and fall prevention; and on sports, recreation and leisure for people who are blind and visually impaired.

The level of coordination needed to produce themed issues and involve a wide range of contributors did not exist prior to engaging the automated workflow system.

The Workflow Deconstructed

Gold appoints a guest editor for theme issues of *Insight* and together they, with the help of a team of associate editors and an editorial advisory board, identify possible contributors and invite submissions. Typically, the guest editor commissions up to a dozen contributions ensuring that there are some left over for future issues.

If a contributor is new to the journal, he or she is invited to set up an online account in Editorial Manager and follow the submission process steps. This involves providing the abstract and the title, choosing which areas the paper relates to, and identifying co-authors. The author then submits the manuscript, usually in Microsoft® Word. Any figures or tables are submitted separately.

At the end of the process, the hosted EM system builds a PDF for the contributor to check. Once the paper is approved by the author, the system, and Gold, the associate or guest editors and Croce each receive an automatically-generated email informing them that the submission is ready for the next stage of the editorial process.

"You can set EM up to do a lot of individual or specific things," says Croce, "and there are templates that you can customize, which is great."

Once Croce knows that a new submission has been made, she goes into the system to check and make sure that everything is okay. "I find the two mistakes that people make most when submitting papers are that they include their name in the title of the document that they attach (which a reviewer would be able to see) and they include their figures or tables within the body of the document rather than as a separate attachment."

When that happens, Croce sends the submissions back to the authors and asks them to fix the problem. Once the submission is fixed, returned and checked again, it moves to the next stage of the process.

If it is intended for a special themed issue of the journal, Croce sends it directly to the guest editor. If it is a regular submission, it goes to the editor-in-chief who decides which of four associate editors it goes to, based on the content of the article. It is then that editor's responsibility to assign at least two peer reviewers who will consider the submission from a pre-approved list vetted by Gold. (Most of the contributors and reviewers are sighted, but Croce says a few are blind or partly sighted and use an add-on software component called Jaws from Freedom Scientific, which reads what is on the screen to the user.)

Each reviewer receives an email from EM informing them of their assignment, which they can either accept or reject by clicking on a link in the email. This sends a message back to the associate editor or the guest editor. If they accept the assignment, the submission is sent directly to them. If they reject it, the associate editor may have to find someone else.



A peer reviewer who has accepted an assignment then has a certain length of time to complete the review—Croce can set how long this is from within EM. The review process itself involves answering questions, filling in certain fields and providing feedback. For example they might say, ‘in paragraph two this sentence didn’t make sense, you need to be more clear about this, or the grammar wasn’t correct or you’re not following the proper style,’ and so forth.

Initially Croce set up EM without reminders designed to keep the reviewers on track, but she has implemented this feature in the last few months. “I was trying to encourage my associate editors to run reports to see who is behind schedule so that they can follow up. That’s been a real challenge,” she says, “because they are all volunteers. They have real jobs.” The automated email reminders cut down on time spent personally checking and following up.

Generally, she says, most reviewers meet their deadlines. There are actually two areas within EM where a reviewer can comment on a submission: one that the author can see and another that only the editor sees. Once the associate editor receives the comments, they can decide to accept the submission without any changes, tell the authors they must revise based on what the reviewers have said, or reject it. *Insight* has two rejection categories. One is just an outright rejection. The other is reject ‘with possibility of resubmitting’ used, for example, if the author has submitted something that is a good topic but failed to structure it properly.

The associate editor may send it back to the author for revision as many times as necessary. Then it goes to the editor-in-chief, who can also send it back for revision or accept it. Once accepted, a notice goes out to the author saying, “Okay, we’re going to publish you.” Typically, the whole review process from submission to acceptance takes about six

months but Croce says sometimes it is much longer.

Once the author has been told that a paper has been approved for publication, the process moves to the next stage and Croce becomes directly involved again. "There are forms that I fill out online—and send it to the publisher," she explains. Only at this stage, before it is sent electronically to the publisher's FTP site, is the submission allocated to a specific issue of *Insight*.

At any stage during the review process Croce and *Insight* editors can 'see' where a submission is and, "who's been notified of what."

"The challenge that we've had is getting correspondence about particular articles included in EM," says Croce. "We're getting better at it. Sometimes you do wind up having long email conversations about a particular article that are not part of the system." Discussion forums integrated into EM allow open-ended conversation among editors, which the AER has come to value.

Croce recognizes that EM is extremely flexible and that often the features that she wants are already in the system or have recently been added by Aries. "Sometimes we simply didn't know how to utilize a particular feature yet." Aries Systems holds webinars and user group meetings and deploys email campaigns designed to inform customers of new enhancements.

The AER's Online Submission Sites

***Insight* Submission**

www.editorialmanager.com/insight

AER Regional Conference Abstract Submission

www.editorialmanager.com/aerabstract

University Program Approval Online Application

www.editorialmanager.com/aeruppr

Final Thoughts

Overall she is pleased with EM, and states, "It meets and exceeds expectations." And she has high praise for the training and support she received during the setup phase from the Aries account coordinator. "She walked me through the setup and learning phase, and was just awesome," says Croce. She is also impressed with the support Aries has provided since EM went live.

"What I would love to have if we had the time and the resources, would be a one-on-one personal training session with the editors and the staff now that we have used the system for a while. In the beginning, you don't know what questions to ask."

In addition to using EM for producing *Insight*, the Association has discovered other uses for the system. "We use it for books and for processing abstracts for conferences," says Croce, who adds that it has saved the Association the cost of purchasing dedicated packages. "Even though EM was not originally geared to producing abstracts, Aries worked with us to come up with the best solution for AER."

Recently, staff began using EM to produce an interactive web site for the Association's University Review Program—something they could not have afforded to do otherwise. On the site, applicants may put in for approval of their university programs that prepare personnel to work as teachers of students with visual impairments, orientation and mobility specialists, and/or vision rehabilitation therapists.

Ginger Croce has some advice for other cost-constrained organizations that are considering moving to an electronic editorial management system. "Don't go with the lowest price; go with one that fits your needs," she says, "because if it doesn't fit your needs then you're not going to be satisfied. If you have goals that you must accomplish, you have to make sure you can do it with the system you choose."



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