# Welcome to the 17th Annual ENUG BOSTON

### #EMUG2019

# EMUG 2019

#### Configuration Audit And Consultation Workshop

Kate Horgan Director, Client Services khorgan@ariessys.com



#### Agenda

- Audits: What it is and why you want it
- Audits: The Process
- Audits: How to get one
- Additional Resources
- Ask us your configuration questions today!



### What is an audit?

And why you want it!



#### **Audits**

- What is it?
  - An Aries Client Services staff member reviews your site
  - Based on conversation with you, we identify features you may find useful
  - We do not make any configuration changes to your site but we will offer tips and suggestions to assist you in getting the most out of EM/PM
- Why you want it
  - Established publications may overlook new features that would be useful
  - Newer publications may be more open to adapting workflows after using EM for a time
  - It never hurts to have a second set of eyes to help improve your workflow and process



### The Process

How we audit your publication



#### Process

- Publisher identifies the EM site for audit
  - Representative of current workflow
  - New or divergent workflow from standard
- Introductory call held with key publication staff
  - Review site audit process and timeline
- In-depth interview with Managing Editor or workflow administrator and Aries staff
  - What are your goals of the audit?
  - What pain points or questions would you hope this audit addresses?
  - Explanation of audit process and workflow questionnaire
  - Jessica Snapke, Sr. Account Coordinator, leads Aries site audits

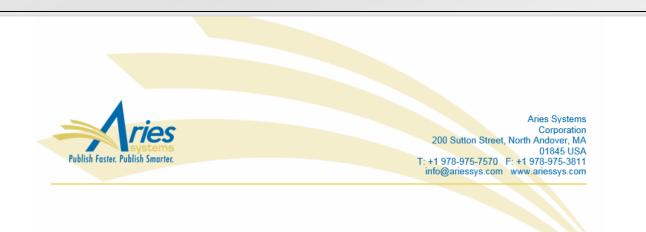


#### Process

- Following the call, a questionnaire is sent to gather some final data
  - Is there information you would like to collect that you do not currently collect?
  - Are there daily tasks that you would like to change?
- A clone of your site is made
- Jessica then does a full review of the cloned site, looking for areas of improvement
- Approximately 3-4 weeks later, a report is delivered with findings and recommendations
- You can make any adjustments in the cloned site for testing prior to implementation on your live site or sites



#### Sample



#### Site Audit Report and Recommendations

Publisher:	{ <mark>Publisher</mark> }		
Society:	{ <mark>Society Name (if applicable)</mark> }		
{Journal/Publication}	Name:	{ <mark>Publication Name</mark> }	
{Journal/Publication}	Site:	{SITE NAME}	
Audit Conducted by:	{ <mark>Auditor</mark> }		
Date Conducted:	{ <mark>QN YYYY</mark> }		

#### **Brief Summary**

Registration, Home and Login Page Suggestions lid spot areas   Update Home Page: The Home page currently lists information that may be out of date. lid spot areas   Specifically, {describe outdated content}. e EM features   A best practice is to avoid using dates on the Home page unless a procedure is in place for someone to audit.	De sistentione House and Lopin De se Guerratione	of EM. We	
Specifically, {describe outdated content}.	Registration, Home and Login Page Suggestions	lid spot areas	
audit.	Update Home Page: The Home page currently lists information that may be out of date.		
	Specifically, {describe outdated content}.		
review it regularly for currency.		audit.	
<i>SITE NAME</i> 's Aries Account Coordinator can make changes to the homepage, including any necessary tials.		tials.	
Match Colors and Banner with Publication Branding: The colors on the Home page and figurations;   ose to utilize ose to utilize	Match Colors and Banner with Publication Branding: The colors on the Home page and	J ,	
banner do not match the branding found on the publication Home page <mark>{insert URL}</mark> . Keeping the color	banner do not match the branding found on the publication Home page <mark>{insert URL}</mark> . Keeping the color		



#### How do you get one?

- Contact your Account Coordinator
- Contact your Account Manager
- Speak to one of us here

## Just Ask!





#### **Resources Available for Reference**

- Release Notes and Release Digests
  - https://www.ariessys.com/for-current-customers/feature-newer/
- EM Help
  - https://www.editorialmanager.com/robohelp/15.1/index.htm#t=EM\_H elp.htm
  - Or from Help link on EM Banner updated with each release
- Aries Video Library
  - https://www.ariessys.com/views-and-press/resources/video-library/
- Your Aries Account Coordinator



#### Questions?



