Invited Article Workflow in Editorial Manager

European Editorial Manager and ProduXion Manager User Group Meeting
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WILEY

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Advanced Materials
Advanced Functional Materials
Advanced Healthcare Materials
Advanced Engineering Materials
Proposal Menu in Editorial Manager

- **Initiating new proposals**
- **Tracking active proposals**
  - invitations
  - outstanding, agreed/declined
  - submissions
  - in progress, received
- **Archiving completed proposals**
  - completed
  - withdrawn
- **Sending reminders (Reports)**
  - invited but no response yet
  - agreed but late submission
  - manually or automatically
Step 1: Initiating a new proposal

- Different **proposal types** can be set up and selected
  - e.g., *Article Invitation*
    - for a single author
  - *Special Issue Invitations*
    - for multiple authors
Step 1: Initiating a new proposal

- Different **proposal types** can be set up and selected
  - e.g., *Article Invitation*
    - for a single author
  - *Special Issue Invitations*
    - for multiple authors
- **Article Type** can be pre-selected, or left for author
- **Title** has to be provided
  - working title, can be changed for submission
  - e.g., title of special issue
- **Target Publication Date, Volume, Issue** can be set
  (optional, not in continual)
- Proposal can be linked to **Section / Category**
Step 2: Searching for and selecting authors

- From user database in EM
- Register and Invite New Author

- Proposal is assigned own manuscript number, any resulting submission (child manuscript) will be assigned new manuscript number
Step 2: Searching for and selecting authors

- From user database in EM
- Register and Invite New Author
- **Author List File**
  - .txt or .csv file
    - LASTNAME
    - FIRSTNAME
    - EMAIL
    - TITLE (optional)
Step 2: Searching for and selecting authors

- From user database in EM
- Register and Invite New Author
- **Author List File**
  - .txt or .csv file
  - useful for inviting multiple authors at once
  - matched with records in EM user database during import

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**Upload Author List**

Use this option to upload a list of potential Authors from a file which includes their First Name, Last Name, Email Address, and optionally, a description of the material they will be asked to author and an ORCID ID. *(more...)*

Browse your computer:

Or Drag & Drop a File Here

No Author List File has been uploaded for this submission.

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**Author Candidates**

The Author Candidates found in the uploaded file are displayed below. If any errors exist within the data they are highlighted with a warning icon. Depending on the issue with the data, the offending record may not be imported. Rolling over the ! icon where an issue has been discovered will provide information about the issue. The 'Ignore' option can be used to exclude Authors before importing the list.

To load the approved records into the 'Author Candidates' grid choose 'Import'. Choose the 'Remove' option to remove your file so that you may correct any issues and upload the file again.
Step 2: Searching for and selecting authors

**Invitation / Author Statistics** are displayed during author selection:

- Numbers and dates outstanding / agreed / declined / un-invited invitations
- For agreed invitations, numbers and dates awaiting / received submissions
- **Cross-journal (portal-wide) statistics** also are provided

![Table]

- **Agreed and Awaiting Submission:** 1
- **Invited Submissions Received:** 3
- **Un-invited Before Agreeing:** 0
- **Un-invited After Agreeing:** 0
- **Last Invited Submission Agreed:** 20 Oct 2016
  - Portal-wide: (advenergymat) 07 Dec 2016
- **Last Invited Submission Received:** 20 Sep 2016
  - Portal-wide: (advmat) 20 Sep 2016
- **Last Invited Submission Declined:** -
  - Portal-wide: -
- **Avg Days to Submit:** 237.33
Step 3: Customizing the invitation letter

Useful merge fields:

- **%INVITATION_NOTES_TO_AUTHOR%**
  - info about scope, etc.
- **%INVITED_SUBMISSION_RESPOND_DATE%**
  - response deadline
- **%INVITED_SUBMISSION_DUE_DATE%**
  - submission deadline
Step 3: Customizing the invitation letter

Useful merge fields:

- %INVITATION_NOTES_TO_AUTHOR% – info about scope, etc.
- %INVITED_SUBMISSION_RESPOND_DATE% – response deadline
- %INVITED_SUBMISSION_DUE_DATE% – submission deadline

- Different (shared) **Author Invitation letters** can be set up in EM
- Letters can be **customized** before sending
Step 3: Customizing the invitation letter

Useful merge fields:
- **%INVITATION.NOTES_TO.AUTHOR%**
  - info about scope, etc.
- **%INVITED_SUBMISSION_RESPOND_DATE%**
  - response deadline
- **%INVITED_SUBMISSION_DUE_DATE%**
  - submission deadline
- Custom merge fields
  - journal-specific info, etc.
  - used in shared letters
Step 3: Customizing the invitation letter

Useful merge fields:
- `%INVITATION_NOTES_TO_AUTHOR%` – info about scope, etc.
- `%INVITED_SUBMISSION_RESPOND_DATE%` – response deadline
- `%INVITED_SUBMISSION_DUE_DATE%` – submission deadline
- Custom merge fields
  - journal-specific info, etc.
  - used in shared letters
- `%ACCEPT_INVITATION%` – deep link to EM account
- `%DECLINE_INVITATION%` – deep link to EM account
Step 3: Customizing the invitation letter

Useful merge fields:

- %INVITATION_NOTES_TO_AUTHOR% - info about scope, etc.
- %INVITED_SUBMISSION_RESPOND_DATE% - response deadline
- %INVITED_SUBMISSION_DUE_DATE% - submission deadline
- Custom merge fields - journal-specific info, etc.
- used in shared letters
- %ACCEPT_INVITATION% - deep link to EM account
- %DECLINE_INVITATION% - deep link to EM account
Step 4: Author agrees / declines to submit

- Deep link in invitation takes author to **EM user account**
- Invitation can be **agreed to or declined**

![New Author Invitations for EM](image)

### Invited Submissions

**My New Invitations (1)**

**New Author Invitations for EM**

You have been invited to submit a manuscript. Please Agree or Decline to submit.

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Article Type</th>
<th>Article Title</th>
<th>Current Status</th>
<th>Date Author Invited</th>
<th>Date Response Requested</th>
<th>Days Invitation Outstanding</th>
<th>Editor’s Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Invitation Letter</td>
<td>adma.201606249</td>
<td>Article</td>
<td>Invitation</td>
<td>Author Invited</td>
<td>18 Nov 2016</td>
<td>01 Dec 2016</td>
<td>31</td>
<td>Jos Lenders</td>
</tr>
</tbody>
</table>
Step 4: Author agrees / declines to submit

- Deep link in invitation takes author to **EM user account**
- Invitation can be **agreed to or declined**
- Once accepted, invited manuscript can be **submitted** through available link
- Invitation also can be agreed to **by proxy**
Step 4: Author agrees / declines to submit

- **Pending Proposals** provides overview of all proposals
  - numbers of authors invited / accepting / declining / submissions, etc.

<table>
<thead>
<tr>
<th>Action</th>
<th>Proposal Manuscript Number</th>
<th>Proposal Type</th>
<th>Proposal Title</th>
<th>Section / Category</th>
<th>Initial Date of Proposal</th>
<th>Editor Originating Proposal</th>
<th>Handling Editor</th>
<th># of Authors Invited</th>
<th># of Authors Accepting</th>
<th># of Authors Declining</th>
<th># of Author Submissions</th>
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<tbody>
<tr>
<td>View Proposal Details</td>
<td>adfm.201604479</td>
<td>Special Issue Invitations</td>
<td></td>
<td></td>
<td>30 Aug 2016</td>
<td>Jos Lenders</td>
<td>Jos Lenders</td>
<td>18</td>
<td>17</td>
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<td>View Related Submissions</td>
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<td>Article Invitation</td>
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<td>03 Nov 2015</td>
<td>Jos Lenders</td>
<td>Jos Lenders</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Step 4: Author agrees / declines to submit

- **Pending Proposals** provides overview of all proposals
  - numbers of authors invited / accepting / declining / submissions, etc.

- **Details / Author Selection Summary** provides overview per proposal
  - due dates can be extended here
Sending reminder letters (through Reports)

- **Authors Invited – No Response**
  - if authors have been invited, but not agreed or declined to submit (yet)
Sending reminder letters (through Reports)

- **Authors Invited – No Response**
  - if authors have been invited, but not agreed or declined to submit (yet)

- **Author Invitation Status Report**
  - if authors have agreed to submit, but not submitted (yet)

### Authors Invited - No Response Report

Please select the report parameters.

- Handling Editor: Jos Lenders

- Show all Invited Authors that are within 10 days of their Invitation Response Due Date.
- Show all Invited Authors that are 7 days past the Invitation Response Due Date.
- Show all Invited Authors whose invitation response is due between 07/01/2016 and 12/31/2016 (mm/dd/yyyy)
- Show all Invited Authors whose submission is due between 12/01/2016 and 12/31/2016 (mm/dd/yyyy)
- Show all Invited Authors with a Target Publication date between 12/01/2016 and 12/31/2016 (mm/dd/yyyy)
- Show Invited Authors for Target Publication Volume and Issue

### Author Invitation Status Report

This report displays all Invited Authors who have accepted an invitation but have not yet submitted a manuscript, based on the parameters below.

- Handling Editor: Jos Lenders

- Show all Invited Authors who accepted the invitation more than 7 days ago.
- Show all Invited Authors whose submission is due between 07/01/2016 and 12/31/2016 (mm/dd/yyyy)
- Show all Invited Authors with a Target Publication date between 12/01/2016 and 12/31/2016 (mm/dd/yyyy)
- Show Invited Authors for Target Publication Volume and Issue
Sending reminder letters (through Reports)

- A selection of authors can be made from the search results
- Different (shared) **Author Reminder letters** can be set up in EM
- Letters additionally can be **customized** per author
- Letters can be sent **immediately**, or scheduled to be sent **at any later time**
Sending reminder letters (through Reports)

- Reminders also can be scheduled to be sent **automatically**
  - author invited, but no response yet
    - \( x \) days before or after **response due date**
  - author agreed, but no submission yet
    - \( x \) days before or after **submission due date**