

Welcome to EEMUG 2016



 **Editorial Manager**[®]
www.ariessys.com

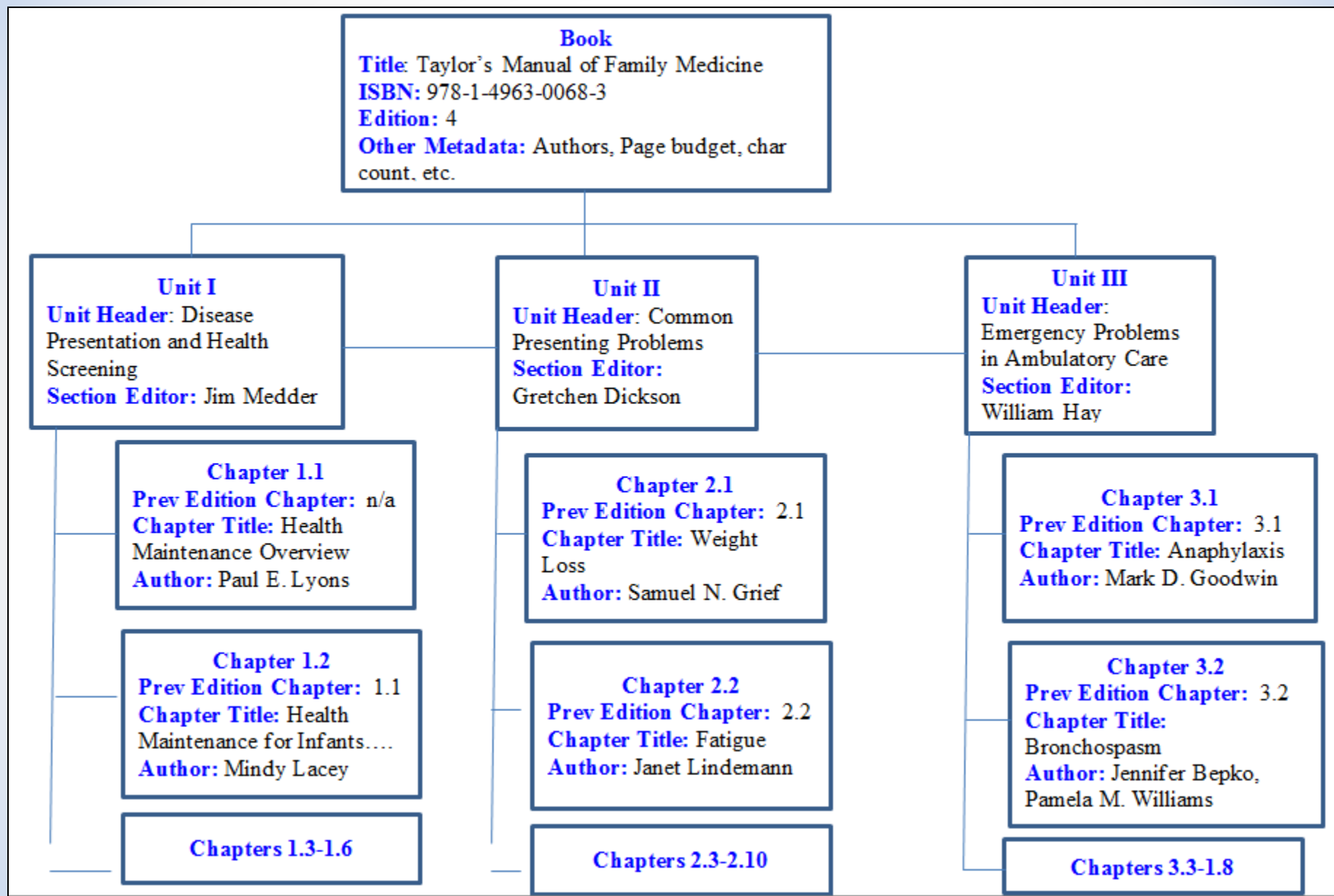
 **Aries**
systems
Publish Faster. Publish Smarter.

Editorial Manager for Books

Upcoming features and enhancements

EM for Books

- New functionality under development specifically designed to improve book workflows
- New features being rolled out across upcoming releases
- Features being planned for release in 13.0, 13.1 and 14.0
- Further development being planned to refine workflow and user interface



General Books Workflow

- Existing functionality supported much of the desired books workflow
 - Preselected Article Types for Invited Workflow
 - Proposals being linked to multiple solicited submissions
 - The ability to construct a Table of Contents using a Schedule Group
- However, in order to facilitate the envisioned books workflow additional development was necessary

Upcoming Books Features

- Schedule Group Enhancements for Books (13.0)
- Predefine Invited Article Titles (13.0)
- Upload Author List (13.0)
- Assign Author (13.1)
- Persistent Proposal Numbering (13.1)

13.0

Schedule Group Enhancements

- Schedule Groups are enhanced:
 - Allows capture and storage of metadata specific to books (e.g. Book Title, multiple ISBNs, Edition)
 - Association of Units with the appropriate Book Product (on creation of the Units within the system), to streamline workflow
 - Preliminary assignment of Chapters to Units (and books) prior to submission of the Chapter to assist with workflow management

Schedule Group Enhancements

- Two Schedule Group Families introduced
 - Issue (existing SG functionality) and Book (new SG functionality)
- Book family incorporates new Book specific metadata fields
- Some Book metadata will flow down into Proposals attached to a Schedule Group

Schedule Group Enhancements

Schedule Group Description:	Insert Special Character Taylor's Manual <small>Maximum Schedule Group Description is 100 characters.</small>
Title:	Taylor's Manual of Family Medicine
Schedule Group Notes:	
ISBN:	978-1-4963-0068-3
Edition:	4
Authors/Volume Editors:	Paulman, Paulman, Jarzynka, Falk
Schedule Group Target Online Publication Date:	<input type="text"/> (mm/dd/yyyy)
Schedule Group Target Publication Date:	12/31/2017 (mm/dd/yyyy)
Schedule Group Target Publication Volume:	<input type="text"/>
Year:	<input type="text"/>
Target Number of Submissions:	167
Page Budget:	2057
Black and White Image Budget:	<input type="text"/>
Color Image Budget:	<input type="text"/>
FIGS: Total # OF:	28
Estimated Figure Pages:	11.16
Char Count Text:	2865988
Text (ms pp):	1559
Estimated Text pp:	693
References (#)	1987
Estimated Reference pp:	79.5
Tables (#)	127
Estimated Table pp:	75.64
Estimated Printed pp:	859.06
Previous Edition pp:	781.25

Schedule Group Enhancements

Table of Contents								
Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Editor Originating Proposal	Author Name	Target Number of Pages	Target Start Page
No submissions that are In Production have yet been added to this Schedule Group.								
Details Remove Header	1	Taylor-D-0001-Unit1	Unit	Unit I: Disease Presentation and Health Screening	Jim Medder		535	
Details Remove Header	2	Taylor-D-0001-Unit2	Unit	Unit II: Common Presenting Problems	Gretchen Dickson		421	
<input type="button" value="Update TOC"/> <input type="button" value="Insert Header"/>								
Pre-selected Submissions								
Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Editor Originating Proposal	Author Name	Target Number of Pages	Editorial Status
	1	Taylor-D-0001-Unit1	Unit	Unit I: Disease Presentation and Health Screening	Jim Medder		535	Author Invited
Details Transmittal Form View Reviews and Comments		Taylor-15-I-00001	Chapter	1.1 Health Maintenance Overview		Paul E. Lyons	11	17181
Details Transmittal Form View Reviews and Comments		Taylor-15-I-00002	Chapter	1.2 Health Maintenance for Infants and Children		Mindy Lacey	15	21271
Details Transmittal Form View Reviews and Comments		Taylor-15-I-00003	Chapter	1.3 Health Maintenance for Adolescents		Avery L. Sides	17	26813

Schedule Group Enhancements

- Proposals enhanced:
 - New Book-related Proposal Type
 - Access to new Books-specific metadata fields

Initiate Proposal

Pre-selecting a component type for invited submissions is optional. The 'Author Will Select' option allows the invited Author to select from a list of invited article types.

Article Type:	Book Unit
Schedule Group:	Taylor's Manual; Taylor's Manual of Family Medicine
Schedule Group ISBN:	978-1-4963-0068-3
Schedule Group Edition:	4
Schedule Group Authors/ Volume Editors:	Paulman, Paulman, Jarzynka, Falk
Pre-select Article Type for Invited Submissions generated from this Proposal:	Author Will Select ▼

- Books metadata pulled down to Proposal from Schedule Group

Schedule Group Enhancements

- Proposal can now be assigned to Schedule Groups
 - Schedule Group is selected when initiating Proposal

Initiate Proposal

Selecting a Schedule Group is optional. To associate the Proposal with a Schedule Group, select a Schedule Group from the drop-down list and click the 'Proceed' button. Or, to proceed with Proposal creation without associating the Proposal with a Schedule Group, click the 'Proceed with No Schedule Group' button.

* Article Type	Book Unit ▼
Schedule Group	None ▼

- When Book-related Proposal Type is used existing Book Family Schedule Groups appear in drop-down menu

Schedule Group Enhancements

View Related Submissions for Manuscript Number Taylor-5-0001

Contents: Submissions where one or more Authors have submitted related manuscripts. The parent manuscript is listed first, with Related Submissions listed below the parent manuscript.

Schedule Group: Taylor's Manual: Taylor's Manual for Family Medicine
ISBN: 978-1-4963-0068-3
Edition: 4
Authors/Volume Editors: Paulman, Paulman, Jarzynka, Falk

Page: 1 of 1 (2 total invited submissions)

Proposal					
Action	Proposal Manuscript Number	Proposal Article Type	Proposal Article Title	Editor Originating Proposal	Initial Date of Proposal
Details ▾ History Set Final Disposition Invite Authors Similar Articles in Medline	Taylor-5-0001	Unit	3: Disease Prevention and Health Screening	Jim Medder	Sept 18 2015

Related Submissions													
Action	Manuscript Number	Article Type	Article Title	Initial Date Submitted	Status Date	Current Status	Previous Edition Chapter	Previous Edition pp	Target Number of Pages	Char count	Text (ms pp)	Estimated Text pp	References (#)
View Submission Edit Submission Details ▾ History Set Final Disposition Initiate Production Go to Submission Similar Articles in MEDLINE	Taylor-5-0001-d-0001	Chapter	1.1 Health Maintenance Overview	Dec 30 2008 12:20PM	Jan 6 2009 12:36PM	Sent Back/a to Author			11	17181	7.5	3,333	10
AccView Submission Edit Submission Details ▾ History Set Final Disposition Initiate Production Go to Submission Similar Articles in MEDLINE	Taylor-5-0001-D-0002	Chapter	1.2 Health Maintenance for Infants and Children	Dec 30 2008 12:20PM	Jan 6 2009 12:36PM	Reviewers Invited	1.1	9.5	15	21271	9.75	4,333	14

Predefined Article Titles

- In Book workflows the content to be created by Authors often is a known quantity with a title determined by the publisher
- In the past Editors might include the title in the invitation letter to the Author and rely on them to enter it manually

Predefined Article Titles

- In 13.0 configurations can be made to allow title values to be defined by an Editor when soliciting an Author, includes:
 - Full Title
 - Secondary Full Title
 - Short Title
 - Secondary Short Title

Authors to Invite		Article Title	Invited Author Response Due Date	Author Submission Due	Do Not Invite
Thomas Marshall Aaberg, Jr, MD	Letter / Invitation Notes To Author Author Invited to Submit Customize	Full Title (Limit 200 Characters): Secondary Full Title: Short Title (Limit 50 Characters): Secondary Short Title: <input type="checkbox"/> Lock title(s) for Author	09/12/2015	45 45 Days After Author Accepts	<input type="checkbox"/>

Predefined Article Titles

- The ability to predefine titles is determined by the settings of the parent submission from which the invitations originate

Allow Editor to predefine submission title values:

Provided titles are initially unlocked (Author can change)

Provided titles are initially locked (Author cannot change)

- The ability to enter one of the four possible title values is determined by the settings of the child submission
 - If the Article Type is preselected its settings will be used to display the fields and their limits

Predefined Article Titles

- Depending on configurations these titles may initially be locked or unlocked for editing by Authors



The screenshot shows a web form titled "New Submission". On the left, there are two buttons: "Select Article Type" and "Enter Title". The main content area is titled "Please Enter The Full Title and Short Title of Your Submission" and contains a red error message: "Entering a Full Title is required for Submission." Below the error message, there is a text area with the following predefined titles:

Full Title (Limit 200 characters)
Chapter 1: Emerald Tide

Secondary Full Title
Chapter 1: Tide de Emerald

Short Title (Limit 200 words)
Emerald Tide

Secondary Short Title
Tide de Emerald

At the bottom of the form, there are "Previous" and "Next" buttons.

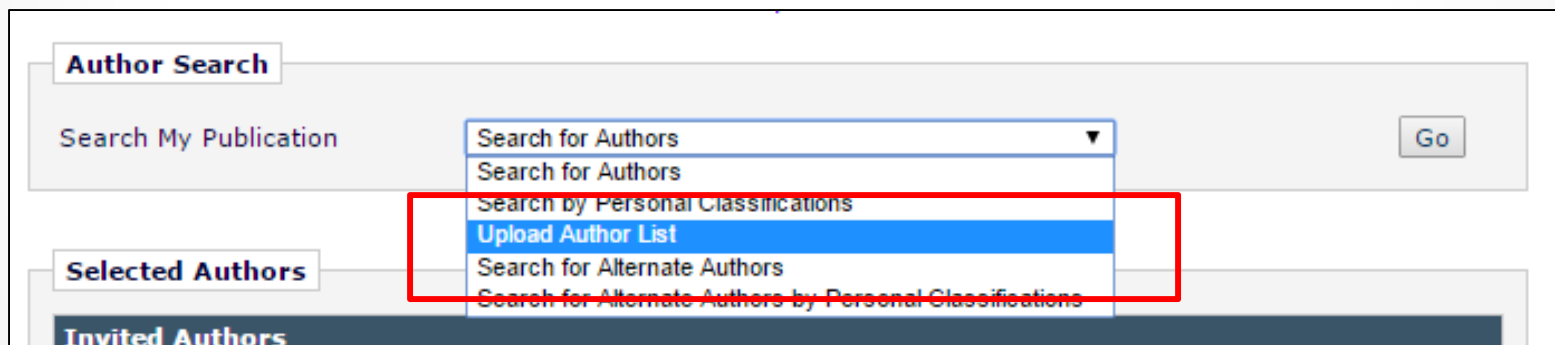
- Editors will have the option to alter the default lock state on a case by case basis

Upload Author List

- The recruitment of Authors to write for a book is primarily based on relationship building, calling in favors, cajoling, and strong arming
- Publishers typically have a list of Authors who are willing to write a chapter or section of a book prepared before they are ready to begin using a system to build a Table of Contents populated with the individual sections of a Book Product
- Hundreds of Authors may contribute to a book, making searching for, registering, and inviting them a long, monotonous task

Upload Author List

- Editorial Manager 13.0 introduces the ability to upload a list of Authors to solicit, instead of searching for each individual



- Allows Editors to quickly select Authors whether or not they have existing EM accounts

Upload Author List

- A comma separated or tab-delimited list of Authors may be uploaded by an Editor
- Authors in the list will be matched to existing EM accounts when possible and be proxy registered when not
 - Incomplete data is filtered out of the import
- In addition to Author information the uploaded file may contain a predefined title for the requested work and notes about the assignment

Upload Author List

- Editors simply upload a file, preview the information to be imported and proceed

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:

Choose File

Or Drag & Drop a File Here

No Author List File has been uploaded for this submission.

[Cancel](#)

Author Candidates

The Author Candidates found in the uploaded file are displayed below. If any errors exist within the provided 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 when an issue has been discovered will provide information about the issue. The 'Ignore' option can be used to exclude Author 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.

[Remove](#) [Import](#)

Invitation	FIRSTNAME	LASTNAME	EMAIL	ORCID	TITLE	NOTE	Ignore
True	Hike	O'Natalie	mdnatale@arlesys.com;mdnatale@gmail.com	0000-0002-0136-5875	Chapter 1	Thank you for your service on this books project	<input type="checkbox"/>
True	Caroline	Hobber	carobber@arlesys.com	0000-0001-6783-1234	Chapter 3	Thanks for taking the time to participate	<input type="checkbox"/>
True	Janel	Santali	jansali@arlesys.com	0000-0003-6310-5785			<input type="checkbox"/>
True	Sally	Ubrooke	subrooke@arlesys.com;subrooke@arlesys.com		Chapter 2	Chapter 2	<input type="checkbox"/>
True	Hike	O'Natalie	mdnatale@arlesys.com;mdnatale@gmail.com	0000-0002-0136-5875	Chapter 4	Completing chapter 1 should be your first priority	<input type="checkbox"/>
True	Terry	Badman	tbadman[at]arlesys[dot]com		Chapter 10		<input checked="" type="checkbox"/>
True	Kate	Horgan	khorgan@arlesys.com		Chapter 21		<input type="checkbox"/>
True			bookauthor@books.org				<input checked="" type="checkbox"/>
True		Badman	tbadman@arlesys.com		Chapter 11		<input checked="" type="checkbox"/>
True	Terry	Badman			Chapter 12		<input checked="" type="checkbox"/>
False	Laurel	Cocao	lcocao@arlesys.com	ABCD-EFGH-IJKL-PMNO			<input type="checkbox"/>

[Remove](#) [Import](#)

'Author Candidates' Results - Manuscript CAROLINEDEV101-D-13-00005
"this is my title"

Author List File	File Name	Size	Last Modified	Actions
	AuthorListFile.csv	767 Bytes	Jul 01, 2015	Remove

Author Candidates

Check the box for each person you want to invite to submit, and then proceed.

Page: 1 of 2 (12 total Authors) 1 2 >> >> | Display 10 results per page.

Select	Number of Invitation Letters	Author Name	Board Member	Invited	Unacknowledged	Submissions Being Processed	Author Statistics	Invitation Statistics
<input checked="" type="checkbox"/>	3	Confirmed Match: Thomas Marshall Aaberg, Sr., Ph.D., Ph.D., Ph.D., Ph.D.	No	0	0		Agreed and Awaiting Submission: 0 Invited Submissions Received: 0 Un-invited Before Agreeing: 3 Un-invited After Agreeing: 0 Last Invited Submission Agreed: - Last Invited Submission Declined: - Avg Days to Submit: 0	Date Last Invited: Jun 30 2015 4:22PM Outstanding Invitations: 0 Agreed: 0 Declined: 0 Un-invited: 3 Total Invitations: 3
<input checked="" type="checkbox"/>	1	No Match Found; Account will be proxy-registered					Information from File: Thomas Aaberg taaberg@science.org Note: 123456789123456789The basic Note: Digging Deeper Author Invited - June 8 2015 2:15PM	
<input type="checkbox"/>	1	No Match Found; Account will be proxy-registered					Information from File: Jason Jones jmjones@technology.org Note: Particles Multiple imported Author records contain the same email address. Please select only the record you wish to invite.	

13.1

Assign Authors

- Coming in EM 13.1 Authors will be able to receive assignments in addition to invitations
- Enables workflows where an Author can submit a solicited submission without having to accept an invitation
- In many book-related workflows the Authors have already been cajoled by an Editor/Lead Author into accepting work, this eliminates the confusion of having to agree again

Assign Authors

Author Candidates

Check the box for each person you want to invite to submit, and then proceed.

Invite All / Assign All / Clear All

Page: 1 of 2 (12 total Authors)

1 2 >> >|

Display 10 results per page.

Select As		Number of Letters	Author Name	Board Member	Submissions Being Processed		Author Statistics				Invitation Statistics										
Inv.	Asn.				Invited	Unsolicited	Agreed and Awaiting Submission:	Assigned Submissions Received:	Invited Submissions Received:	Un-invited Before Agreeing:	Un-invited After Agreeing:	Last Invited Submission Agreed:	Last Invited Submission Received:	Last Invited Submission Declined:	Avg Days to Submit:	Date Last Invited:	Outstanding Invitations:	Agreed:	Declined:	Un-invited:	Total Invitations:
<input type="checkbox"/>	<input type="checkbox"/>		Alfonso Di Girolamo, Jr	No			Agreed and Awaiting Submission: 2	Assigned Submissions Received: 2	Invited Submissions Received: 0	Un-invited Before Agreeing: 0	Un-invited After Agreeing: 0	Last Invited Submission Agreed: Nov 5 2015 3:34PM	Last Invited Submission Received: -	Last Invited Submission Declined: -	Avg Days to Submit: 0	Date Last Invited: -	Outstanding Invitations:	Agreed:	Declined:	Un-invited:	Total Invitations:
<input type="checkbox"/>	<input type="checkbox"/>		Michael Di Natale, MD Agreed to Submit - Nov 5 2015 3:34PM	No	1	15	Agreed and Awaiting Submission: 2	Assigned Submissions Received: 0	Invited Submissions Received: 0	Un-invited Before Agreeing: 0	Un-invited After Agreeing: 0	Last Invited Submission Agreed: Nov 5 2015 3:34PM	Last Invited Submission Received: -	Last Invited Submission Declined: -	Avg Days to Submit: 0	Date Last Invited: Nov 5 2015 3:34PM	Outstanding Invitations: 0	Agreed: 2	Declined: 0	Un-invited: 0	Total Invitations: 2
<input type="checkbox"/>	<input type="checkbox"/>		James G. Diamond, MD	No			Agreed and Awaiting Submission: 2	Assigned Submissions Received: 0	Invited Submissions Received: 0	Un-invited Before Agreeing: 0	Un-invited After Agreeing: 0	Last Invited Submission Agreed: Nov 5 2015 3:34PM	Last Invited Submission Received: -	Last Invited Submission Declined: -	Avg Days to Submit: 0	Date Last Invited: -	Outstanding Invitations:	Agreed:	Declined:	Un-invited:	Total Invitations:

Assign Authors

- Properly permissioned Editors will have access to an assign option when selecting Authors
 - Configurations allow Editors to access either option individually or both
- Compatible with Author List File upload process
 - Authors in same file can be selected for both invitation and assignment

Persistent Proposal Numbering

Persistent Proposal Numbering

- Proposals (Units) are tracked in EM using the Proposal Manuscript Number, invited submissions are tracked using their individual Manuscript Numbers
- The automated manuscript numbering functionality has been enhanced to create a clear link between the Proposal and submission, as well as between the related submissions

Persistent Proposal Numbering

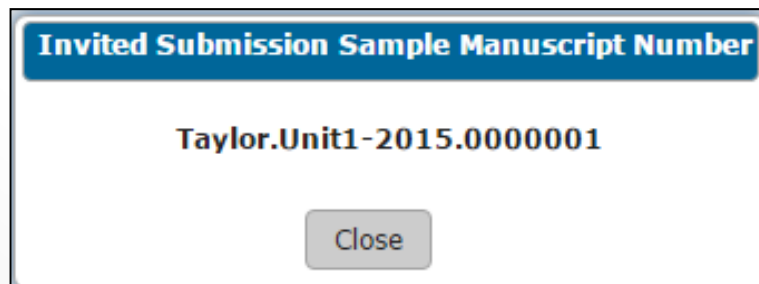
- A format for invited submission Manuscript Numbers is configured as part of the Proposal settings

Invited Submission Manuscript Number Format:

- Automatically Assign Customized Manuscript Number for Invited Submissions [Prefix.IncrementingNumber]
- Include Proposal Manuscript Number [Prefix.ProposalManuscriptNumber.IncrementingNumber]

Select 'Automatically Assign Customized Manuscript Number for Invited Submissions' to allow Editors to enter a prefix and incrementing number to be used for the invited submissions' manuscript numbers when the Proposal is initiated. To further include the Proposal Manuscript Number within the invited submissions' manuscript numbers, select 'Include Proposal Manuscript Number'. The Proposal's manuscript number can only be included if 'Automatically Assign Manuscript Number for Invited Submissions' is selected. If neither option is selected, the publication's manuscript numbering format is used.

- Format options include a prefix, incrementing number, as well as the option to include the Proposal's Manuscript Number



Persistent Proposal Numbering

- Editors will set the prefix and starting number, as well as the minimum number of digits in the starting number, when initiating a Proposal

The screenshot shows a web form with several sections. The 'Invited Manuscript Number Format' section is highlighted with a red box. It contains three input fields: 'Prefix:', 'Starting Number:', and 'Minimum Number of digits in Starting Number:'. Each of these fields has a 'Required field' label to its right. Below these fields is a 'Preview' button. The form also includes buttons for 'Cancel', 'Proceed and Build PDF', 'Proceed with no PDF', and 'Assign to Myself and Invite Authors' at the bottom.

Author Response Due: Number of Days Author has to Respond to Invitation	0 <i>A value of zero indicates the Response due date feature is not being used.</i>
Author Submission Due: Number of Days prior to Launch Date	0 <i>A value of zero indicates the Submission due date feature is not being used.</i>
Manuscript Number:	
Invited Manuscript Number Format:	Prefix.IncrementingNumber
Prefix:	<input type="text"/> Required field
Starting Number:	<input type="text"/> Required field
Minimum Number of digits in Starting Number:	<input type="text"/> Required field
	<input type="button" value="Preview"/>
<input type="button" value="Cancel"/> <input type="button" value="Proceed and Build PDF"/> <input type="button" value="Proceed with no PDF"/> <input type="button" value="Assign to Myself and Invite Authors"/>	

- A preview of the manuscript number will be available to Editors prior to creating the Proposal

Possible Future Enhancements

- Book-focused terminology interface (in process), including merge fields and reports.
- Create the ability to build a book TOC with multiple levels (e.g., volumes, units, sections, chapters) Items can be moved around.
- Allow “Production Tasks” to be assigned to chapters, while keeping those chapters out of the production workflow (e.g., collecting contributor agreements, collecting additional content, working with permissions, etc.).
- Restrict access to schedule groups (e.g., freelancer should only be able to access the schedule group they are working with).
- Modify import/ingest and export/transmittal functions to exchange data with other book systems (e.g., financial, inventory, collateral).