Invited Article Workflow in Editorial Manager

European Editorial Manager and ProduXion Manager User Group Meeting London, 12-13 January 2017

WILEY

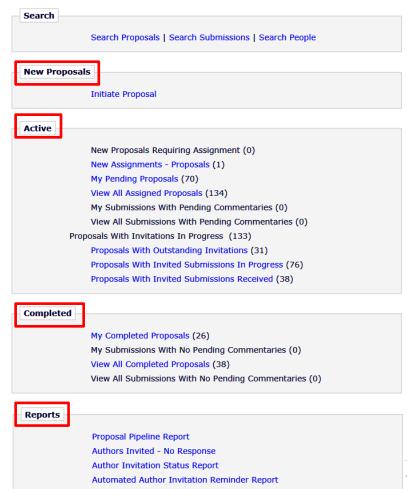
Dr. Jos Lenders, Associate Editor

Advanced Materials
Advanced Functional Materials
Advanced Healthcare Materials
Advanced Engineering Materials

Proposal Menu in Editorial Manager

Editorial Proposal Menu Production Tasks

- 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 - withdrawn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

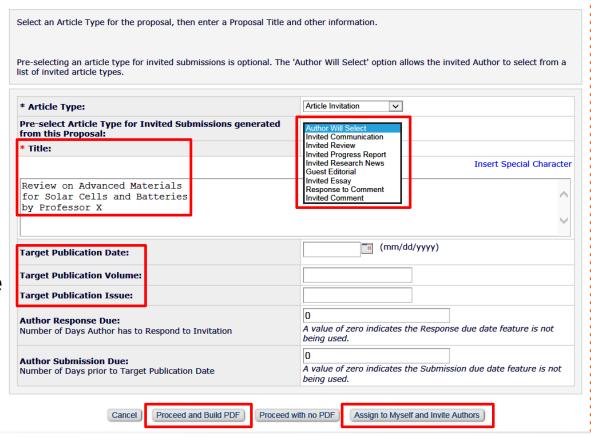
- Different proposal types can be set up and selected
 - e.g., Article Invitation
 - for a single author
 - Special Issue Invitations
 - for multiple authors



Step 1: Initiating a new proposal

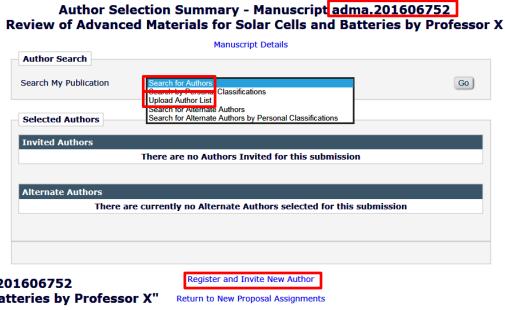
- Different proposal types can be set up and selected
 - e.g., Article Invitation
 - for a single author
 - Special Issue Invitations
 - for multiple authors
- Article Type can be preselected, or left for author
- Title has to be provided
 - working title, can be changed for submission
 - e.g., title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

Initiate Proposal





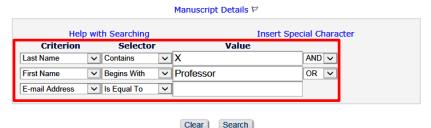
- From user database in EM using search criteria
- Register and Invite New Author
- Author List File
- Proposal is assigned own manuscript number, any resulting submission (child manuscript) will be assigned new manuscript number



Return to Manage Proposals Menu

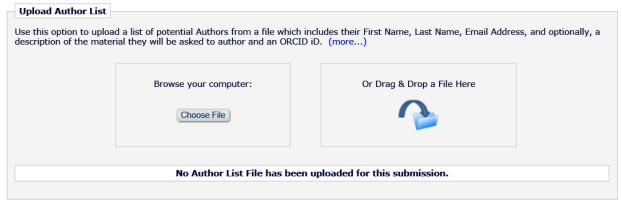
Return to Main Menu

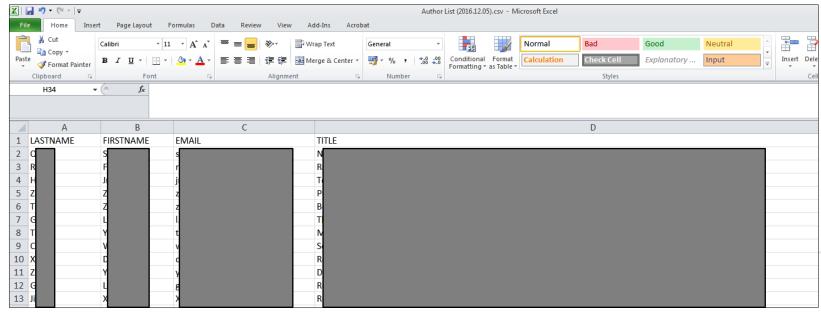
Search for Authors - Manuscript adma.201606752
"Review of Advanced Materials for Solar Cells and Batteries by Professor X"



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- From user database in EM using search criteria
- Register and Invite New Author
- Author List File
 - txt or .csv file
 - LASTNAME
 - FIRSTNAME
 - EMAIL
 - TITLE (optional)





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- From user database in EM using search criteria
- 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



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.

| | | | Remov | re Impo | ort | | | |
|------------|-----------|----------|----------|---------|-------------|---------------|------|--------|
| Invitation | FIRSTNAME | LASTNAME | EMAIL OI | | ORCID Title | | NOTE | Ignore |
| True | q | v | Cá | | | r | | |
| True | F | L | fu | | | <u>А</u> Ь | | |
| True | Н | L | h | | | A a | | |
| True | JI | Y | ZO | | | g g | | |



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

| | Number of Invitation | Author | Board | | missions Processed | | | | |
|--------|---------------------------------|----------------|-----------------|---------|--------------------------------------|---|--|--|--------------------------|
| Select | Letters | Name | Member | Invited | Unsolicited | Author Statistics | | Invitation Statistics | |
| | | | No | 0 | 3 | Invited Submissions Received: Un-invited Before Agreeing: Un-invited After Agreeing: Last Invited Submission Agreed: Portal-wide: (advenergymat) Last Invited Submission Received: Portal-wide: (advmat) Last Invited Submission Declined: Portal-wide: | 1 3 0 0 20 Oct 2016 07 Dec 2016 20 Sep 2016 20 Sep 2016 - - 237.33 | Date Last Invited: 20 Portal-wide: (advenergymat) 07 Outstanding Invitations: 0 Agreed: 4 Declined: 0 Un-invited: 0 Total Invitations: 4 | 0 Oct 2016 7 Dec 2016 |
| Select | Number of Invitation Letters | Author Name | Board Member | Being | nissions Processed Unsolicited | Author Statistics | | Invitation Statistics | |
| | | | No | | | Agreed and Awaiting Submission: Invited Submissions Received: Un-invited Before Agreeing: Un-invited After Agreeing: Last Invited Submission Agreed: Portal-wide: (afm-journal) Last Invited Submission Received: | - 26 Oct 2016 - 27 Feb 2015 - - | Date Last Invited: Portal-wide: (small-methods) 08 Outstanding Invitations: Agreed: Declined: Un-invited: Total Invitations: | 3 Dec 2016 |



- %INVITATION_NOTES_TO AUTHOR%
 - info about scope, etc.
- %INVITED_SUBMISSION_ RESPOND DATE%
 - response deadline
- %INVITED_SUBMISSION_ DUE_DATE%
 - submission deadline

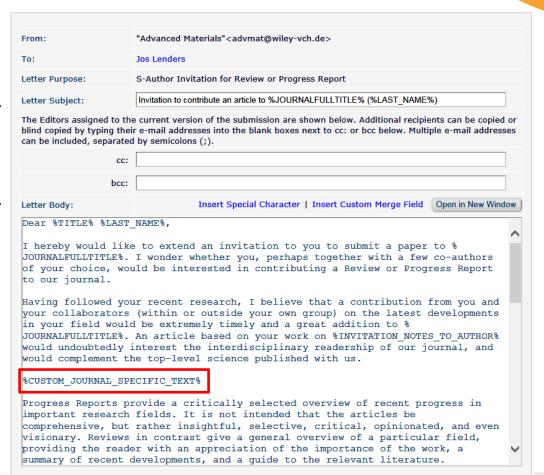




- %INVITATION_NOTES_TO _AUTHOR%
 - info about scope, etc.
- %INVITED_SUBMISSION_ RESPOND_DATE%
 - response deadline
- %INVITED_SUBMISSION_ DUE_DATE%
 - submission deadline
- Different (shared) Author Invitation letters can be set up in EM
- Letters can be customized before sending

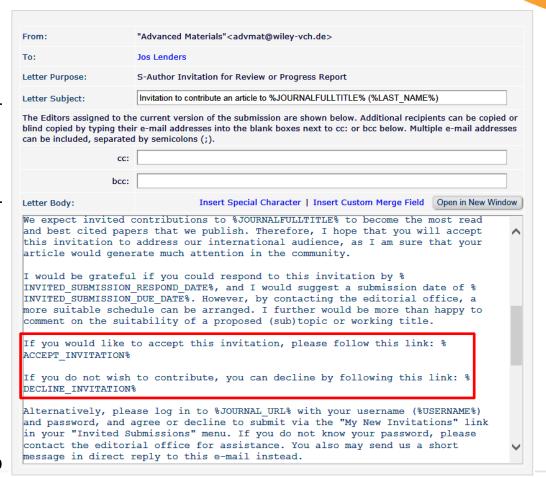


- %INVITATION_NOTES_TO AUTHOR%
 - info about scope, etc.
- %INVITED_SUBMISSION_ RESPOND DATE%
 - response deadline
- %INVITED_SUBMISSION_ DUE DATE%
 - submission deadline
- Custom merge fields
 - journal-specific info, etc.
 - used in shared letters





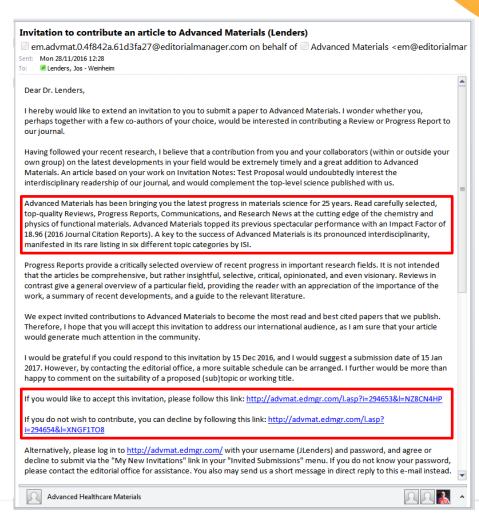
- %INVITATION_NOTES_TO AUTHOR%
 - info about scope, etc.
- %INVITED_SUBMISSION_ RESPOND DATE%
 - response deadline
- %INVITED_SUBMISSION_ DUE DATE%
 - submission deadline
- Custom merge fields
 - journal-specific info, etc.
 - used in shared letters
- %ACCEPT_INVITATION%
 - deep link to EM account
- %DECLINE_INVITATION%
 - deep link to EM account





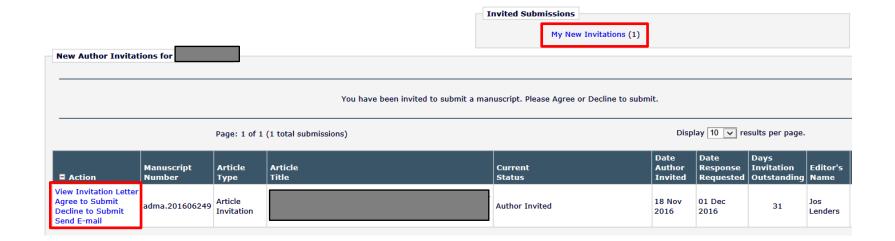
Useful merge fields:

- %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



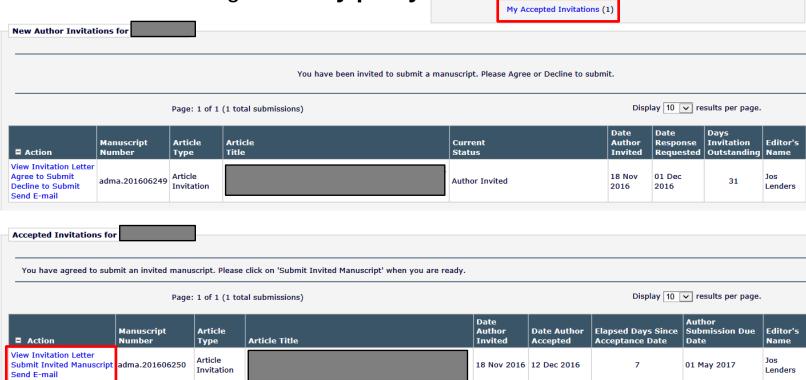


- Deep link in invitation takes author to EM user account
- Invitation can be agreed to or declined





- 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



Invited Submissions



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

| Pending Proposals - Jos Le | nders | | | | | | | | | | |
|---|----------------------------------|---------------------------------|---|----------------------|--------------------------------|-----------------------------------|--------------------------|------------|------------------------------|------------------------------|-----------------------------|
| | Final Disposition. U | se the up/d | een invited. These Proposals requi own arrows to change the sort ord total proposals) | | following a | actions: 1) Vie | w the statu | s of Autho | rs Invited or | | 100 v res |
| ■ Action ▲ | Proposal Manuscript Number | Proposal Article Type | Proposal Title ▲▼ | Section/ Category | Initial Date of Proposal | Editor Originating Proposal | Handling Editor ▲▼ | | # of Authors Accepting | # of Authors Declining | # of Author Submissio |
| View Proposal Details ♥ History File Inventory Edit Proposal Invite Authors View Related Submissions Set Final Disposition Similar Articles in MEDLINE PubMed - Title Search ISI Web of Knowledge Send E-mail | adfm.201604479 | Special Issue Invitations | | | 30 Aug 2016 | Jos Lenders | Jos Lenders | 18 | 17 | 0 | 2 |
| Details P History File Inventory Edit Proposal Invite Authors Set Final Disposition Similar Articles in MEDLINE PubMed - Title Search ISI Web of Knowledge Send E-mail | adfm.201504720 | Article Invitation | | | 03 Nov 2015 | Jos Lenders | Jos Lenders | 1 | 0 | 0 | 0 |



- 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





Authors Invited – No Response

if authors have been invited, but not agreed or declined to submit (yet)





- 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)

| Reports | |
|---|---|
| Proposal Pipeline Report Authors Invited - No Response | Authors Invited - No Response Report |
| Author Invitation Status Report | Please select the report parameters. |
| Automated Author Invitation Reminder Report | Handling Editor: Jos Lenders |
| ○ Show all Invited Author | s that are within 10 days of their Invitation Response Due Date. |
| ○ Show all Invited Author | s that are 7 days past the Invitation Response Due Date. |
| Show all Invited Author | s whose invitation response is due between 07/01/2016 and 12/31/2016 (mm/dd/yyyy) |
| O Show all Invited Author | s whose submission is due between 12/01/2016 and 12/31/2016 (mm/dd/yyyy) |
| ○ Show all Invited Author | s with a Target Publication date between 12/01/2016 and 12/31/2016 (mm/dd/yyyy) |
| ○ Show Invited Authors for | or Target Publication Volume and Issue |
| Show all Invited Author | s who have not yet submitted. |
| | 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 Author | s who accepted the invitation more than 7 days ago. |
| Show all Invited Author | s whose submission is due between 07/01/2016 and 12/31/2016 (mm/dd/yyyy) |
| O Show all Invited Author | s with a Target Publication date between 12/01/2016 and 12/31/2016 (mm/dd/yyyy) |
| O Show Invited Authors for | or Target Publication Volume and Issue |



- 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

| Send Reminder | Manuscript Number | Article Type | Manuscript Title | Invited Author Name | Phone Number | Handling Editor Name | Date Invited | Elapsed Days | Invitation Response Due Date | Submission Due Date | Authors Invited - No Response Report Select a letter to send to the Authors. |
|------------------|--|-----------------------|------------------|---------------------------|-----------------|----------------------------|-----------------|-----------------|------------------------------------|------------------------|---|
| | adma.201606249 Details ゼ History | Article Invitation | | | | Jos Lenders | 18 Nov 2016 | 26 | 01 Dec 2016 | 01 May 2017 | Proposal - Unanswered Invitation Reminder Cancel Customize Letter Send Reminders |
| ✓ | adma.201606235 Details ♥ History | Article Invitation | | | | Jos Lenders | 18 Nov 2016 | 26 | 01 Dec 2016 | 01 May 2017 | Author Invitation Status Report Select a letter to send to the Authors. Proposal - Accepted Invitation Reminder |
| ✓ | adma.201606246 Details ♥ History | Article Invitation | | | | Jos Lenders | 18 Nov 2016 | 26 | 01 Dec 2016 | 01 May 2017 | Cancel Customize Letter Send Reminders |
| 2 | adma.201606240 Details \forall History | Article Invitation | | | | Jos Lenders | 18 Nov 2016 | 26 | 01 Dec 2016 | 01 May 2017 | |
| ✓ | adma.201606244 Details ♥ History | Article Invitation | | | | Jos Lenders | 18 Nov 2016 | 26 | 01 Dec 2016 | 01 May 2017 | |
| > | adma.201606226 Details ♥ History | Article Invitation | | | | Jos Lenders | 18 Nov 2016 | 26 | 01 Dec 2016 | 01 May 2017 | |
| ✓ | adma.201606255 Details ♥ History | Article Invitation | | | | Jos Lenders | 18 Nov 2016 | 26 | 01 Dec 2016 | 01 May 2017 | WILEY |

- 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**



| Click the 'I | e 'Edit' tool to edit the criteria sa | ved for a saved reminder. Note: Remind | ders ca | II automated reminder e-mails associated with an only be removed or edited by the user who ecord to the new location via the Drag & Drop |
|--------------|---|--|-------------|--|
| 001. | Reminder Name | Reminder Type | Num Days | aber of Reminder Creator |
| I | Invitation Reminder - before subm - due 28 days | Reminder Before Submission Due Date (Proposal) | 28 | Advanced Biosystems Editorial Office |
| | Invitation Reminder - before subm - due 7 days | Reminder Before Submission Due Date (Proposal) | 7 | Advanced Biosystems Editorial Offic |
| | Invitation Reminder - late subm - 14 days late | Reminder Past Submission Due Date (Proposal) | 14 | Advanced Biosystems Editorial Offic |
| | Invitation Reminder - late subm - 28 days late | Reminder Past Submission Due Date (Proposal) | 28 | Advanced Biosystems Editorial Offic |
| | Invitation Reminder - no response - 21 days late | Reminder Past Invitation Response Due Date (Proposal) | 21 | Advanced Biosystems Editorial Offic |
| | Invitation Reminder - no response - 7 days late | Reminder Past Invitation Response Due Date (Proposal) | 7 | Advanced Biosystems Editorial Offic |



Thank you!

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Dr. Jos Lenders, Associate Editor

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Advanced Functional Materials
Advanced Healthcare Materials
Advanced Engineering Materials