

ARTICLE

Working With Production Vendors: Selecting a Post-acceptance Tracking System

by **Katherine Barton**
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During the past few years, we have found an increasing need to develop a post-acceptance tracking system for our specialist journals. As our portfolio is ever growing, we need a cost-effective, efficient, automated system, which tracks the progression of articles and issues through the workflow, and also manages content and generates accurate statistics and instantaneous reports.

We wanted a system that is intuitive to use, that requires minimal manual intervention, and that accurately tracks articles at every stage of the production process. This became a greater necessity after moving to an article-based workflow in 2010, which has meant accurate

tracking is vital in order to ensure articles are published online within three weeks of acceptance. The Excel® spreadsheets we currently use track articles by the manual input of data and formulae, which is time consuming and can lead to inaccurate reporting. They have also become unwieldy to view, with approximately 50 columns needed to track each stage of the article and issue workflows.

One of the main requirements was for a system that could be populated automatically by metadata feeds from the pre-acceptance tracking system and that captures all of the data we input into the spreadsheets (e.g., linked articles, press releases, theme issues, etc.) In addition, we wanted to

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Working With Production Vendors

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further streamline the production process by automating schedules and issue building.

Accurate and instantaneous reporting was another key factor. The production editors and management team need to generate at-a-glance reports on every variable (*e.g.*, by journal, production editor, typesetter, copyeditor, etc.) in order to monitor performance. Although we can generate reports from the spreadsheets, they are often inaccurate because of missing or inaccurate data or erroneous formulae.

We evaluated four systems (PubFusion™, Production Central, Preprint Manager®, and Publishing At Work). We also considered building our own, but this would have entailed the expense of a software developer and would be potentially more cost and labour intensive than customising an established product. We chose Publishing At Work for reasons of cost, flexibility with regard to configuration, and the potential for future development. It was also visually clear and easy to use, and was the only system that fully met with our requirements. The technical team was accommodating to our need for customisation and shared our vision of how the system could be developed. They were already in the process of developing it from a tracking system into a content management system – something we may wish to develop.

The system has the ability to sweep multiple typesetter FTP sites for file uploads, enabling automation of work and negating the need for e-mail notifications and the manual inputting of dates. So when a file is uploaded by a copyeditor for typesetting, the file record will automatically be progressed to the next workflow stage on the system. We wanted file records to be progressed automatically, with the production editor intervening only when an action is required (*e.g.*, allocating files for

copyediting), avoiding manual ‘clicks’ through the process to move files on to the next stage. The system is also able to automatically count the number of pages in a PDF, again increasing efficiency and reducing the margin for human error. It also calculates issue pagination, including volume and issue numbers.

Reminder alerts are sent automatically through the system to suppliers, production editors, and editors for overdue items. All overdue tasks and articles are also clearly flagged on the main dashboard. Turnaround times, and article and issue schedules are input at the beginning of the year, although there is the ability to amend schedules, fast track specific articles, and create schedules for different products at any point. The system also automatically plugs in UK Bank holidays, and has the capacity to input international holidays on request. Reporting is instantaneous and clear, and reports are presented in graph format, with the ability to export into Excel®.

We have requested some customisation before transfer, but this is relatively minor and easy to implement, and is at low cost. There are also standard system release updates every 6 weeks, which is indicative of the proactive ethos of the company.

We have already begun the development and configuration process, and are aiming to roll out the system across 34 of our journals by June 2011. We will then begin work on developing a content management aspect over the summer.



In Defense of Going to Work

by **Rachel A. Russell**

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Office life is changing. Due to rising gas prices, Web-based workflows, authors/editors/reviewers in many time zones, and ‘magical’ software – like Timbuktu[®], Citrix, and InSites – that is accessible anywhere, telecommuting one day a week (or more) is perfectly possible and productive. I do it too, and I enjoy my weekly (or more if there’s an emergency) telecommuting day. But before we tell our employers we don’t need the office, let’s consider the joys and benefits of working in one.

Driving to work most days, my head is buzzing with many things: What will I do about dinner? Will the laundry get done? Was it a mouse in the basement last night or wild imagination? What should I get my parents for their 50th wedding anniversary? Can I possibly somehow make it to yoga tonight? It is crazy how thoughts can spin and spiral. And then I get to my office and all that disappears. I’m at work. I can set it all aside and focus on what needs to be done today and plan for tomorrow.

The office of my journal, *American Mineralogist*, is located in a quiet campus-like setting – winding walking paths, trees, water fountains, and flowers are always available for a nice break. My office itself is clean and organized – and the trash isn’t my problem, vacuuming isn’t my problem, washing the windows isn’t my problem, and so on. The gardening of those flowers isn’t my problem!

I have computers and software that cost

more than I could afford at home, a computer backup system and computer support, a photocopier/printer/scanner thing, pens, papers, and so on that are bought with office money.

For me, it is an amazing blessing to have an office to go to. Not every day is perfect by any means. But even on the days where the e-mails get wild and the phone rings and the executive director wants to talk and the webmaster has some new directive – the focus is still on work, the goals are still clear and achievable.

Meetings with staff and with those in other departments can be spontaneous and productive at the office. Sometimes a little verbal reminder or question can save many e-mails back and forth. Ideas can blossom from unexpected encounters.

And at the end of the day, I go home with an absolutely clear mind, ready to tackle dinner and maybe even the possible mouse!

There can be problems with going to an office, for example, there can be coworkers with clashing personalities and many interruptions to a train of thought. But working at home doesn’t necessarily mean you won’t hear the construction noise from the new house being built, the shouts of happy children playing after school, the grinding noise of skateboards, or discover you need to give a ride to your 83-year-old neighbor who needs to go to the doctor. (*You* tell her no; I’m not able to!) Telecommuting must be gone into

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continued

carefully.

There is much information out there in books and blogs about setting up a home office and effective means of telecommuting. For example, the remote office information in the November/December issue of *EON* was extremely valuable. We took many of those ideas and thought: If that is efficient for remote work, why wouldn't it also be efficient for the office? Now, for example, we have our specific issue production charts in Excel® instead of paper, accessible via any computer, even those at home. It is exciting to improve our routines and to add the flexibility so vitally needed today. These Excel® charts led to a greater appreciation of being able to download reports in Excel® from our Web-based peer review system (AllenTrack, same as eJournalPress). This is improving and simplifying our work – even if we mostly do it at the office instead of remotely.

In these economic times, taking home a paycheck is a great blessing. But I mean something more, an even deeper satisfaction. Work itself – in my case, the satisfaction of helping authors, editors, and reviewers; managing deadlines, resources, and people; concentrating on copyediting or layouts or Photoshop; or all the other myriad tasks – work itself is a satisfying part of my 'life balance'. Freedom to work the hours you want and in settings you want can slowly morph into

working at midnight, on vacation, and so on in a never-ending stream of exhaustion. Freedom can be another word for trying to be everything to everyone, a super-person. Without careful planning, freedom can mean you get the routine (yet obviously still important) chores of an editorial office, instead of the challenges of creating and shaping the direction and workflow of the journal. Freedom can mean missing the brainstorming and other interactions and being stuck with the laundry.

I am very lucky to have an office in a location I like, with colleagues who are pleasant to work with. There are many books and materials about coping with challenging coworkers or bosses; about management; about office organization. I know it is not always easy, there are offices where yelling might be common or other toxic behaviors. But giving up the office entirely, instead of adding flexibility and maturity to it, should be thought about very carefully.

I may very well have more time for my 'other life' because the boundaries are clear. Who knows? Or in a different life stage, I may write another article about 'who needs an office!' Or, when our computers are embedded in our brains, maybe children will not even know what an office is.



What would you like to tame?

Do you have questions about specific programs, software, or hardware that you would like to see featured in one of these columns in 2011? If so, please contact Lindsey Brounstein, LBrounstein@gastro.org, the Taming Technology section editor and let her know what lions, tigers, and bears are running amok in your world.



My So-Called Society Life: Reading the Fine Print of Peer-Review and Copyright

by Sarah McCormack

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The cleaning crew has already arrived to vacuum our offices and empty trash one last time before the weekend, and I wonder how sane I am for staying this late at the office on a Friday. That said, after reading other Portraits of Editorial Offices in the ISMTE newsletter, my situation seems exceptional in that I have a large office from which I can depart on a Friday afternoon. No e-mails, telephone calls, to-do lists, or stacks of paper brazenly resting in my eyesight at home, unfiled, on a sunny Saturday afternoon. My weekends are (usually) my own.

The American Society for Nutrition (ASN) has its main office on the Beaumont Campus of the Federation of the American Society for Experimental Biology, just outside of Washington, DC. This large campus with many related societies was a big draw five years ago for a young college graduate with a bachelor's degree in German. That degree is really only useful in southeast Michigan where I grew up, and only because of the auto industry's many connections to Germany. I was finished teaching English abroad and ready to start a career, and an office with many different related societies seemed like the perfect place to get a job. By staying

connected, it's easy to learn from others' experiences in the field and to turn a job into a career. I made sure to mention at my job interview that I had copyright experience (getting permission to distribute copies of articles at a conference) and said that I essentially had an English degree in another language. Perfect for a job in publishing!

At ASN there is still staff in the Publications Department who helped train me when I began working there. However, I began work about a year after two nutrition-related societies merged, and we have been in a constant state of dramatic change since then. My first task at the society was to check accepted manuscripts into the production database and give them to one of the copyeditors. This was an easy handoff as I shared an office with one copyeditor; another came directly into the office to pick up her manuscripts; and a third lived in my boss's neighborhood, so he acted as courier for her manuscripts. This task was short-lived though, as the society decided to outsource the copyediting staff. Around the same time the person handling accounting for the Publications Department retired and a new production manager was hired from another

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continued

society on campus. My department was looking much different. We had just moved from the fourth floor to the fifth, shuffled around on the fifth floor, and then back down to the fourth floor.

In that time I learned how to edit the website, how to use the peer-review submission site, and how to find answers for people from the submission site. Soon enough I was making complicated workflow diagrams of proposed changes and sending them out for feedback. It feels a bit like engineering work, trying to think of all of the repercussions for changing a single step in the workflow. Many changes need to be reflected in the HTML and the PDF versions of the Information for Authors, and off-site peer-review staff, editors, and the printing press need to be kept informed of even small changes.

The society also decided to merge processes and policies between its journals, so I read our own fine print in order to decide which policies to keep when there was more than one (sometimes even for a single journal). Of course, that process involves more than changing text on a website. Conference calls, board meetings, and sometimes long e-mails were needed to make decisions. No college English (or German) class had prepared me to write with the clarity needed to explain a problem with a policy or procedure and a proposed solution to scores of extremely busy people. No matter how clearly I thought I was writing, someone would find a way to read the e-mail differently than I intended. Once we discussed the disagreements, I learned their understanding of what I wrote was just as logical as my very different intention. I feel very lucky to work for and with former copyeditors and a style guide, and have no idea

how people outside the publishing industry learn to communicate. There's so much nuance in English!

Every process and policy needs to be reconsidered when two organizations merge. Which printer do we prefer? How do you move a journal from one printer to the next? Which peer-review site do we like? And while we're making changes, can we automate our permissions and reprints process entirely? Our poor project manager – he thought he was simply designing an automated system for reprint purchases and permissions processing, when actually we used that time to combine and refine both journals' entire policies! And since we have become so good at designing things, why don't we start a new journal? There has been no shortage of ideas, although the same cannot be said of staff and time.

Copyright became my specialty, and I am only beginning to learn the number of questions we can ask. Do we accept electronic signatures on copyright forms? What is an acceptable electronic signature? What happens if someone cannot or will not sign? What provisions do we make for US government employees, when the US government says work prepared by its employees is not subject to copyright? What if some but not all authors are US government employees? What special provisions are made for authors working at the National Institutes of Health? How is this different from the US Department of Agriculture? What happens when the Canadian government decides it wants the same rights? What about when the World Health Organization decides they want to reserve even more rights than the US government? How do you respond to authors and readers who believe freely accessible

My So-Called Society Life

continued

materials are all in the public domain? Although we refer to both photos and diagrams as figures, how does copyright law differ? What ethical rights come into play when the photos are of people? Of children in a foreign country with different privacy laws? Who owns copyright of a photo of a drawing? When does an adapted figure need permission to be reproduced, and when is it considered an original work? How do you convince someone (or be convinced by someone) to see eye-to-eye with you on any of these questions?

There is no end to the number of questions, ideas, and procedures in an industry changing as dramatically as publishing. And when I finally leave my office late on Friday, it occurs

to me that if this column were fiction, then the EBSCO commercial about electronic resource discovery and connecting librarians to resources and subscriptions would play over my NPR news station as I drove past the National Institutes of Health campus and the National Library of Medicine. In the real world my NPR station began talking about a song about the Egyptian revolution called January 25. I call my sister (hands-free of course), to ask whether she knows there's a song named for her birthday.



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Calendar of Events

Introduction to Journals Publishing

10 May 2011

Chicago, IL, USA
<http://www.alpsp.org>

Introduction to Journals Publishing

12 May 2011

Philadelphia, PA, USA
<http://www.alpsp.org>

The Journal Editorial Office

18 May 2011

London, UK
<http://www.alpsp.org>

Effective Journals Marketing

19 May 2011

Washington, DC, USA
<http://www.alpsp.org>

Society for Scholarly Publishers Annual Meeting

1-3 June 2011

Boston, MA, USA
<https://www.sspnet.org/>

Journal Development

8 June 2011

London, UK
<http://www.alpsp.org>

Understanding Copyright

16 June 2011

London, UK
<http://www.alpsp.org>

Editorial Manager User Group Meeting

23-24 June 2011

Cambridge, MA, USA
<http://www.editorialmanager.com/>

**ISMTE
US Conference**
9-10 August 2011
Washington, DC-area
www.ismte.org

Effective Journal Editorial Management

5 October 2011

London, UK
<http://www.alpsp.org>

**ISMTE
European Conference**
18 October 2011
Oxford, UK
www.ismte.org

Editorial Manager User Group Meeting

28 November 2011

London, UK
<http://www.editorialmanager.com/>

11th EASE Conference

8-10 June 2012

Tallinn, Estonia
<http://www.ease.org.uk/>

EON is seeking **column editors** for the *Tips & Tricks* and *Publication Partners* columns. The column editor is responsible for recruiting the column's articles. Interested? Contact the Editor, Kristen Overstreet, at kristen.overstreet@mac.com. We look forward to working with you!

ISMTE *EON*

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A note on English: ISMTE aims to be a truly international society. English will represent our lingua franca, but we would like to stress that, in materials published in EON or online, variations in idiomatic usage and spelling should reflect the origins of the author. No one version of English is preferred over the other.

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