Welcome to
EMUG 2017
BOSTON

Aries systems
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em Editorial Manager®   pm ProduXion Manager®

Editorial Manager® for *Books*

Workshop

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- What is EM *for Books*?
- Adapting for books publishing
- Books-related features
- Example workflow
- Coming soon (EM 14.0)
- Discussion

What is EM for Books?

Thanks for asking

What is *EM for Books*?

- Combination of overlapping editorial workflow (Editorial Manager) and production workflow (ProduXion Manager) functionality

- Provides
  - ✓ Configurable workflows: roles, files, forms, letters, etc.
  - ✓ Metadata and files
  - ✓ Configurable tasks
 - ✓ Automated reminders, tracking, etc.
  - ✓ Reporting

What is EM *for Books*?

- Text throughout the system has been updated to use a book-related vocabulary

- Books-focused features
  - ✓ Enhancements to existing features were rolled out in 13.0, 13.1
  - ✓ Additional functionality is planned for 14.0
  - ✓ Future development will refine workflow based on feedback and user interface

- Using a dedicated EM/PM site for book processing is recommended

What is EM *for Books*?

Data model is appropriate for multiple types of books: books, sections, chapters, contributions
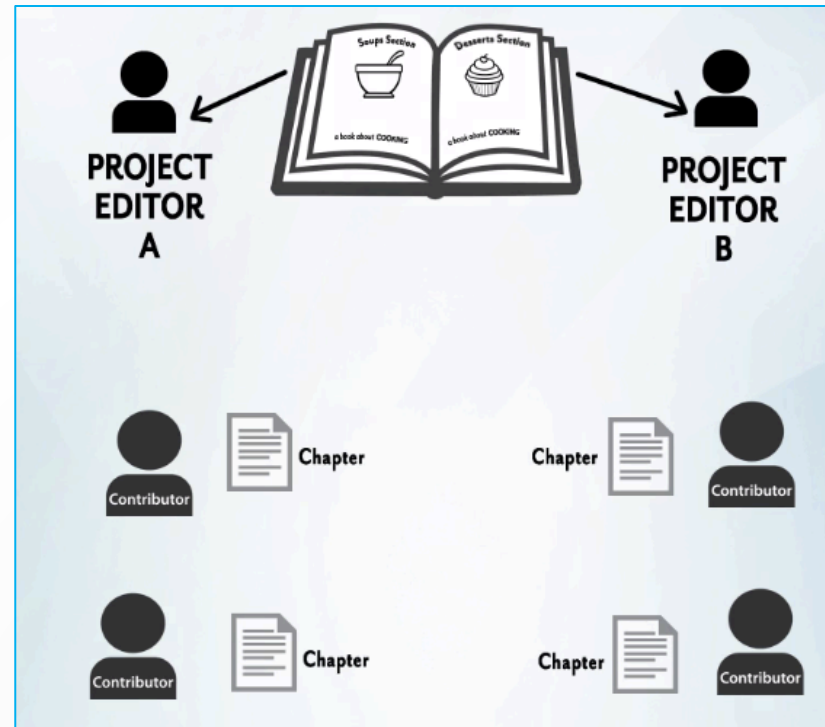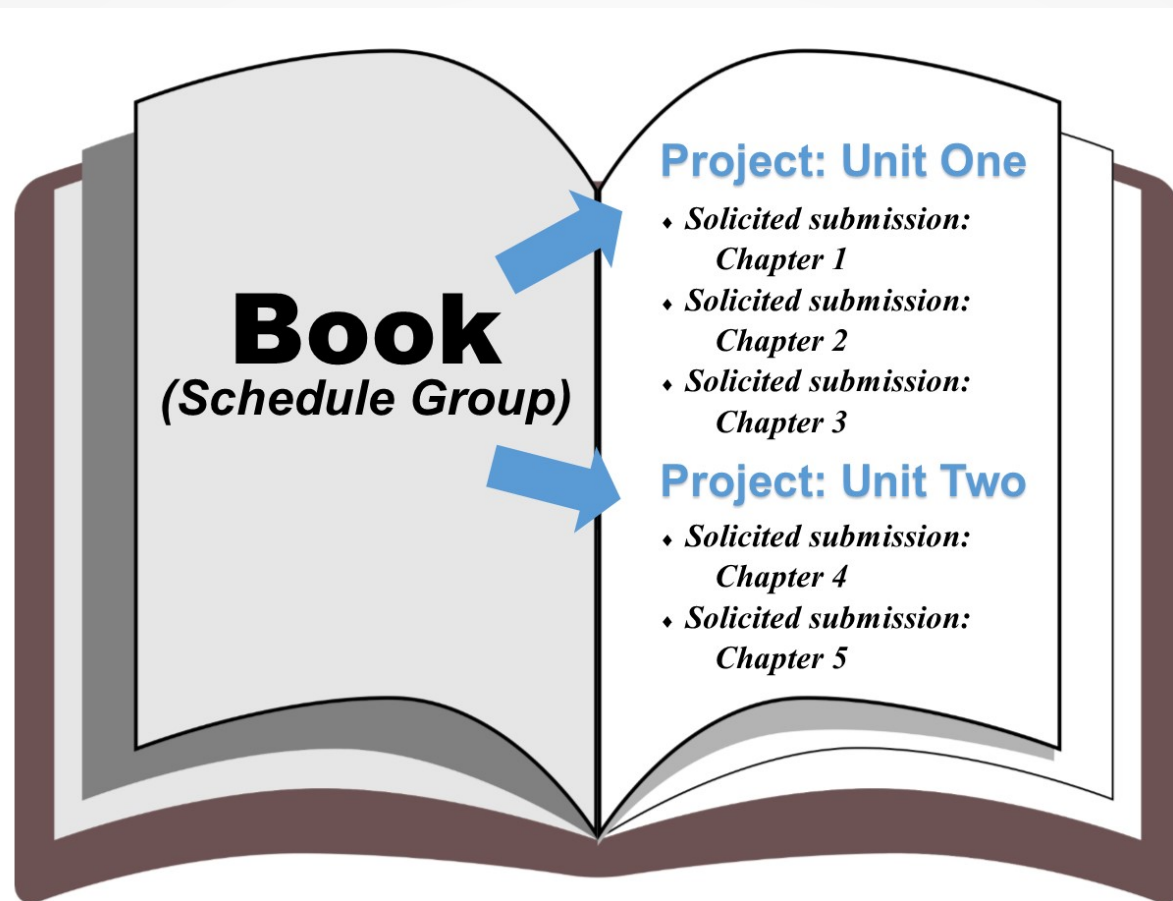
Book
(Schedule Group)

Project: Unit One

- *Solicited submission: Chapter 1*
- *Solicited submission: Chapter 2*
- *Solicited submission: Chapter 3*

Project: Unit Two

- *Solicited submission: Chapter 4*
- *Solicited submission: Chapter 5*

Book
(Schedule Group)

Project: Unit One
- *Solicited submission: Chapter 1*
- *Solicited submission: Chapter 2*
- *Solicited submission: Chapter 3*

Project: Unit Two
- *Solicited submission: Chapter 4*
- *Solicited submission: Chapter 5*

Unsolicited content can also be added
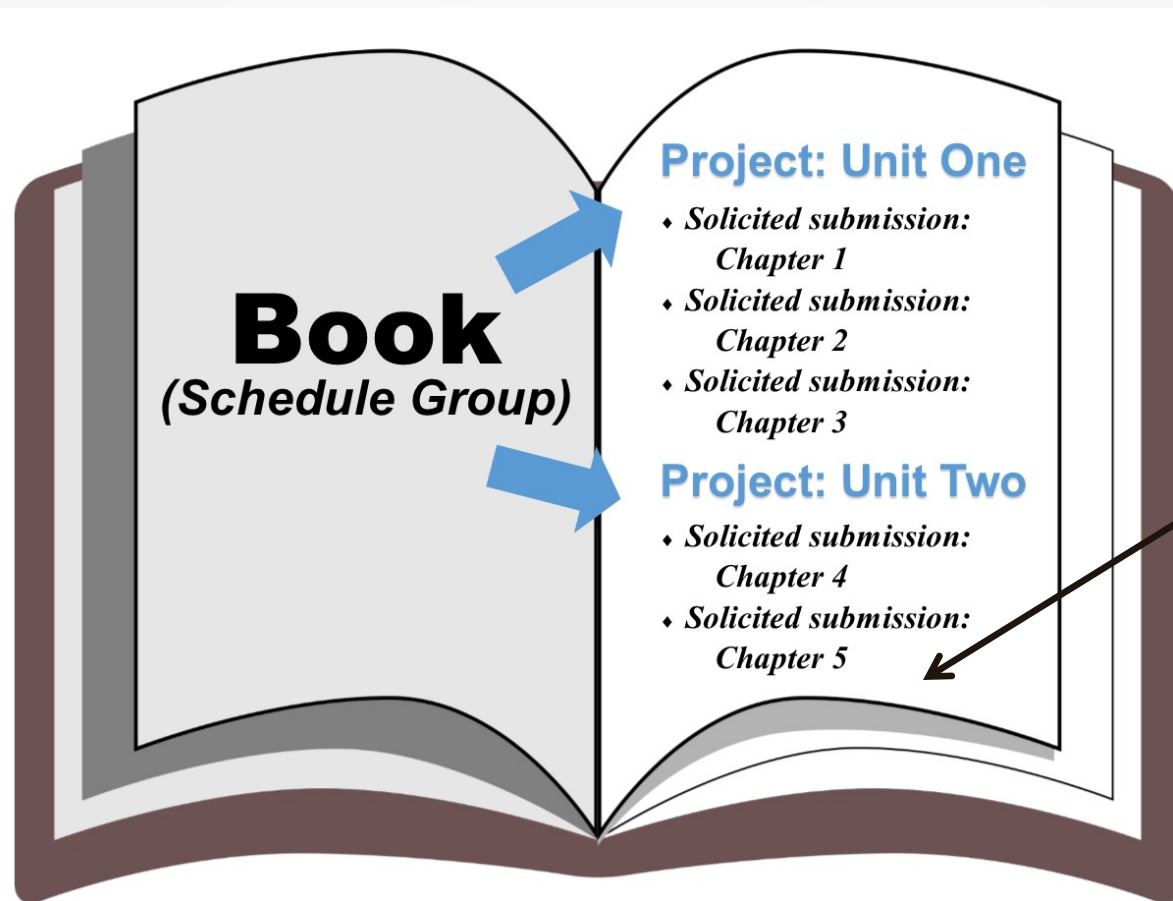
Adapting EM for Book Publishing

Once upon a time…

Once upon a time…

- To achieve the desired books workflow, existing EM/PM functionality was reviewed and evaluated

- Key features were already in place:
  - ✓ 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
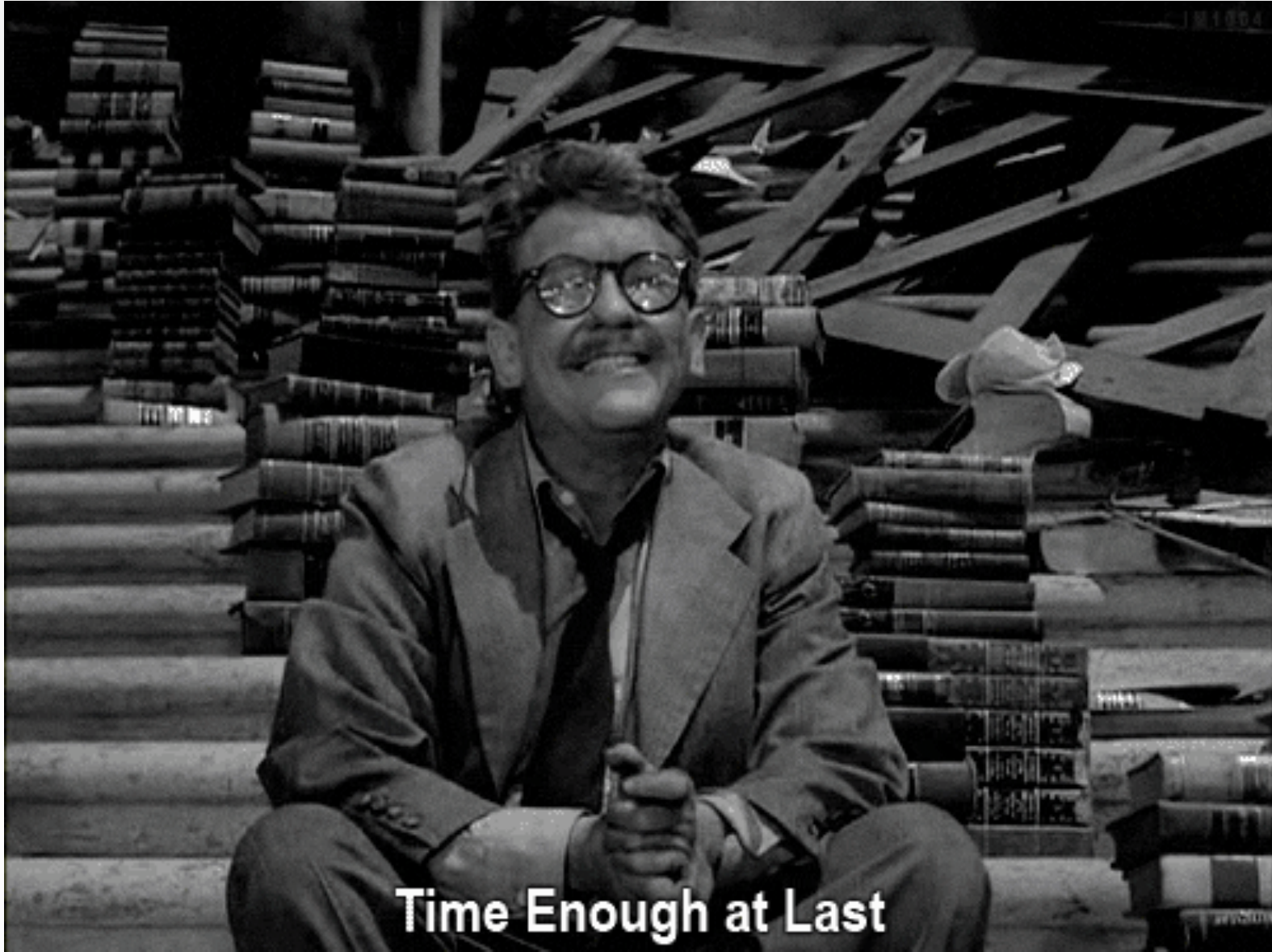
Time Enough at Last

Books Feature Development

- Existing features
  - ✓ Schedule Group enhancements (book families, metadata fields)
  - ✓ Proposal and invited submission enhancements
  - ✓ Ability to upload Author/Contributor list file
  - ✓ Predefine invited article titles
  - ✓ Assign Author/Contributor
  - ✓ Manuscript numbering enhancements
  - ✓ Books language pack

Books Feature Development

- Coming soon
  - ✓ BITS Production Task Transmittals
  - ✓ Additional Schedule Group/Book Detail Fields

Books Language Pack

New "language pack" specific to books

- Terminology selected based on feedback from key users Examples:
  - ✓ "Schedule Group" → "Book"
  - ✓ "Proposal" → "Project"
  - ✓ "Author" → "Contributor"
  - ✓ "Article Type" → "Manuscript Type"

- Intended to be site-wide conversion for sites dedicated to a book publishing workflow

Default Books Template

- We've created a separate template used to create new books sites on EM

- The template is configured with book-related features enabled, allowing for quick setup of a new site for dedicated books processing

Books-related Features

~~Schedule Group~~ Enhancements

Boo

k

- "Schedule Group" is a ProduXion Manager concept
  - ✓ Container for submissions
    - – Issue in a journal workflow
    - – Book in a books workflow
  - ✓ Provides top level metadata, table of contents
- Schedule Groups enhanced with Issue and Book "families"
  - ✓ Book family has new metadata fields specific to books (e.g., book title, multiple ISBNs, edition)
  - ✓ Book site can be configured to automatically create new Schedule Groups in the Book family
- Books language pack renames "Schedule Group" to "Book"

Add Book Page (with book metadata fields)

Book Description:	Insert Special Character
	Maximum 100 characters
Title: ←	
	Maximum 2000 characters
Subtitle:	
	Maximum 2000 characters
Alt-title:	
	Maximum 2000 characters
Book Notes:	
ISBN: ←	
Book DOI:	
Book ID:	
Edition: ←	
Copyright Statement:	
	Maximum 2000 characters
Copyright Year:	
Copyright Holder:	
Authors/Volume Editors: ←	

Book Metadata Fields

- Existing metadata fields (adapted from journal workflow)
  - ✓ Book Description
  - ✓ Book Notes
  - ✓ Target Online Publication Date
  - ✓ Target Publication Date
  - ✓ Target Publication Volume
  - ✓ Year
  - ✓ Target Number of Submissions
  - ✓ Page Budget
  - ✓ Black and White Image Budget
  - ✓ Color Image Budget

Book Metadata Fields

- New book-specific metadata fields
  - ✓ Title (e.g., Book Title, handbook title)
  - ✓ ISBN (multiple are allowed)
  - ✓ Edition
  - ✓ Authors/Volume Editors
  - ✓ Doppler Black and White Budget
  - ✓ Doppler Color Budget
  - ✓ Total Figure Parts
  - ✓ Estimated Number of Figure Pages
  - ✓ Total Character Count

Book Metadata Fields

- New book-specific metadata fields
  - ✓ Total Manuscript Text Pages
  - ✓ Estimated Number of Published Text Pages
  - ✓ Total References
  - ✓ Estimated Number of Reference Pages
  - ✓ Total Tables
  - ✓ Estimated Number of Table Pages
  - ✓ Estimated Total Printed Pages
  - ✓ Previous Edition: Number of Pages

Proposal/Project Enhancements

- Proposals are called "Projects" in the Books language pack
- Project Article Types can be designated as book-related
- If a Project is book-related, it can be associated with a Book when the Project is initiated
  - ✓ Projects are shown as headers in the Book TOC
  - ✓ Subsequent chapters/invited submissions solicited for this project are tied to Book

Proposal/Project Enhancements

Editor chooses an existing Book from the drop-down menu
(or creates a new one) when initiating Project

Initiate Project

Selecting a Book is required. Once a Book has been selected, information from that Book will be displayed automatically, and Project creation can continue. A Book can be added to the list by clicking the 'Add Book' link.

* **Project Type:**	Book Section
* **Book:**	Please Choose a Book Add Book

Cancel   Proceed

Proposal/Project Enhancements

Book metadata is displayed on *Initiate Project* page

Initiate Project

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

Project Type:	Book Unit
* Book:	The Sample Book; An Elementary Illustration of the Book Workflow in Action
ISBN:	1234567890
Edition:	1st
Authors/Volume Editors:	A.B. Cee, Ph.D.
Pre-select Manuscript Type:	Contributor Will Select
* Title:	

Proposal/Project Enhancements

- Book metadata is available for entry on *Initiate Project* page
- Intended to hold data relevant to a Project within a Book

Total Character Count:	
Total Manuscript Text Pages:	
Estimated Number of Published Text Pages:	
Total References:	
Estimated Number of Reference Pages:	
Total Tables	
Estimated Number of Table Pages	
Black and White Image Budget:	
Doppler Black and White Budget:	
Color Image Budget:	
Doppler Color Budget:	
Total Figure Parts	
Estimated Number of Figure Pages	
Estimated Total Printed Pages	
Previous Edition: Number of Pages:	

Proposal/Project Enhancements

Book metadata is displayed on *View Related Submissions* page

	Project										
⊟ Action	Project Tracking Number	Project Type	Project Manuscript Title	Editor Originating Project	Initial Date of Project	Target Pub. Date	Target Pub. Volume	Status Date	Current Status		Final Disposition
Details ▽ History Set Final Disposition Invite Contributor Similar Articles in MEDLINE	DMITRI-MANUAL-00004	Book Unit	My required proposal title	Ed J Editor, MD	Mar 16 2016 12:32PM	Dec 30 2017 12:00AM	33	Mar 16 2016 12:33PM	Contributor Assigned to Project		

	Related Submissions																	
⊟ Action ⚠	Manuscript Number ▲▼	Manuscript Type ▲▼	Manuscript Title ▲▼	Contributor Name ▲▼	Initial Date Submitted ▲▼		Status Date ▲▼	Current Status ▲▼	Editors Decision ▲▼	Final Disposition ▲▼	Target Number of Pages ▲▼	Previous Edition Chapter ▲▼	Previous Edition Number of Pages ▲▼	Total Character Count ▲▼	Text Manuscript Pages ▲▼	Estimated Number of Text Pages ▲▼	Total References ▲▼
View Submission Edit Submission Details ▽ History Set Final Disposition Initiate Production Go to Submission Similar Articles in MEDLINE	DMITRIDEV131-D-16-00030	Chapter	my chapter for book 4	Michael Dean Wagoner, MD	Mar 16 2016 12:39PM		May 9 2016 3:18PM	Submitted to Editorial office			0	15	25	1500	22	21	30

Page: 1 of 1 (1 total submissions)   Display 10 ▾ results per page.

Proposal/Project Enhancements

Projects appear in Book Table of Contents as headers with associated book metadata

Table of Contents

Actions	Target TOC Position	Manuscript Number	Manuscript Type	Title	Editor Originating Project	Contributor Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Previous Edition: Chapter	Previous Edition: Number of Pages	Text Character Count	Manuscript Text Pages	Estimated Text Pages	Total References
Details ▽ Remove Header	1	Unit-1-book1	Proposal - book-related - new as of 3-7-2016	Unit 1 - Book 1	Ed J Editor		0					15	35	3500	28	26	22
Production Details ▽ Transmittal Form Remove from Group	2	DMITRIDEV131-D-16-00021	Chapter	Chapter 1.1 - book1		David H. Abramson, MD	0	0	0		10.11260150031	15	5	1424	53	25	5
⊞ Additional Manuscript Details																	
Production Details ▽ Transmittal Form Remove from Group	3	DMITRIDEV131-D-16-00022	Chapter	Chapter 1.2 - book 1		Richard L. Abbott, MD	0	0	0		10.11260150032	12	12	1200	10	11	35
⊞ Additional Manuscript Details																	
Details ▽ Remove Header	4	unit-2-book1	Proposal - book-related - new as of	Unit 2 - book1	Ed J Editor		0					5	25	2500	20	23	15

Invited Submission Enhancements

- Book-related metadata fields are also available for invited submissions

- When a Project is assigned to a Book, the invited submissions from this Project will also be pre-assigned to the Book

  - ✓ Assignment occurs when a submission is received by publication

  - ✓ Assigned manuscripts appear in new "Pre-selected Submissions" grid on *Book Details* pages

  - ✓ Added to TOC when submissions enter production

Invited Submission Enhancements

A Pre-selected Submissions grid appears on *Book Details* pages

Predefined Submission Titles

Both full and short titles can be predefined by an Editor when soliciting a Contributor

Assign Contributor

- Invited-workflow enhancement allows Contributors to receive assignments directly, instead of receiving invitations

- Enables workflows in which a Contributor can submit a solicited chapter without first having to accept an invitation

- New ActionManager events support separate default Contributor assignment letter templates for Commentaries and Submissions invited for a Project

Assign Contributor
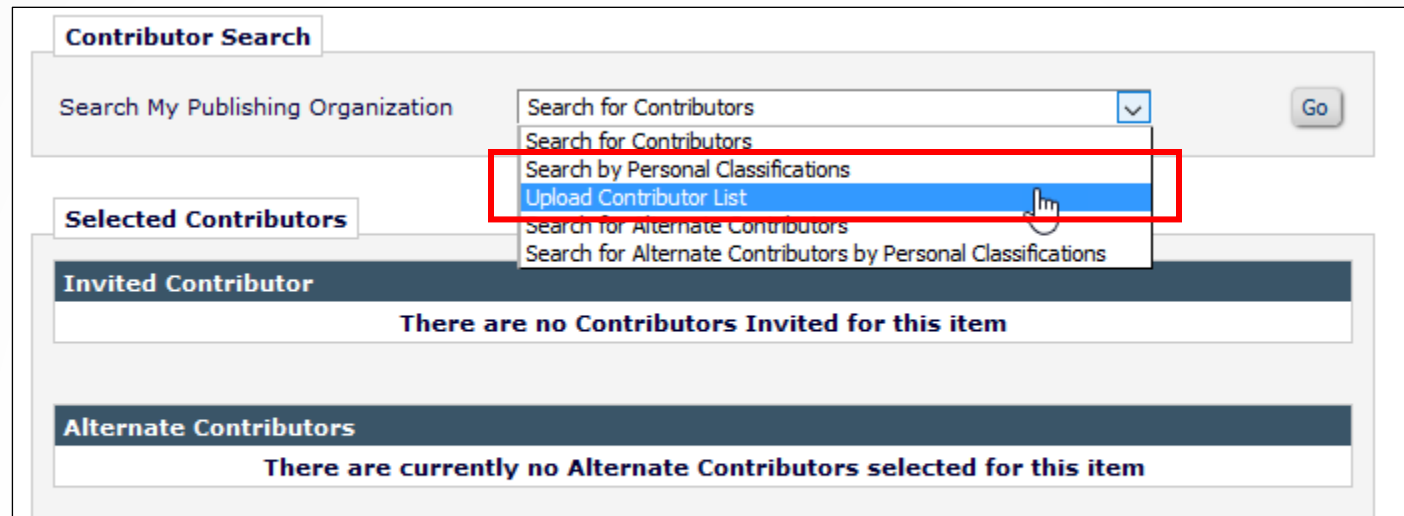
Contributor Candidates

Select a checkbox for each person you wish to select as a Contributor. (more...)

Page: 2 of 2 (19 total Contributors) |< << 1 2

| Select As | | Number of Letters | Contributor Name | Board Member | Classifications | Submissions Being Processed | | Contributor Statistics |
Inv.	Asn.					Invited	Unsolicited	
☐	☐		Amy Analyst	No		0	0	
☐	☐		Edward Editor	No		0	0	
☐	☐		Ann Associate	No		0	0	
☐	☐		Archie Assistant	No		0	0	
☐	☐		Dwight Deputy	No		0	0	
☐	☐		Paul Publisher	No		0	0	
☐	☐		Allan Author	No		0	0	
☐	☐		Abby Author	No		0	0	
☐	☐		Casey Coauthor	No		0	0	

Page: 2 of 2 (19 total Contributors) |< << 1 2

Assign Contributor

- Properly permissioned Editors will have access to an "assign" option when selecting Contributors
  - ✓ Configurations allow Editors to access either "invite" or "assign" option, or both

- Compatible with Contributor List File upload process
  - ✓ Contributor List File can contain a mix of Contributors selected for invitation or assignment

- Contributor assignments go directly to the My Assignments folder on the Contributor Main Menu

Upload Contributor List File

- EM allows Editors to upload a list of Contributors to solicit, instead of searching for each individually

- Ideal for a Book or Project where multiple assignments will be handled by a large, known list of Contributors

Upload Contributor List File

- Uploaded in csv format
- EM displays a preview of the data in the file

Upload Contributor List File

- Invitation column controls whether Contributors will be invited or assigned directly
  - ✓ Set to *True* to auto-select Contributor for invitation
  - ✓ Set to *False* to auto-select Contributor for assignment
  - ✓ Provide no value to select the Contributor without an invite/assign option selected

Contributor Candidate Confirmation

- EM finds matching user account (ORCID, email address, names)
- New Contributor is proxy registered if no account is found
- Contributors can be invited for multiple submissions/chapters

Search Submissions

Pre-selected Book added to Search Submissions criteria list

Manuscript Numbering Enhancements

- Projects are tracked in EM using the Project manuscript number

- Invited submissions are tracked using their individual manuscript numbers

- Enhanced automated manuscript numbering functionality creates a clear link between the Project and submission, as well as between the related submissions

- Format for invited submission manuscript numbers is configured as part of the Project Manuscript Type settings

Manuscript Numbering Enhancements

When initiating a Project, Editors will set numbering format, which is applied to all the invited submissions

Manuscript Numbering Enhancements

Editors can preview the invited submission manuscript number format before finalizing the Project

Example:

- Prefix = Taylor.Unit1-2015.

- Starting Number = 1

- Minimum Number of Digits in Starting Number = 7

Manuscript Numbering Enhancements

Result:

- First invited submission will have the number Taylor.Unit1-2015.0000001

- Second invited submission will have the number Taylor.Unit1-2015. 0000002

- And so on

Invited Submission Sample Manuscript Number

Taylor.Unit1-2015.0000001

Close
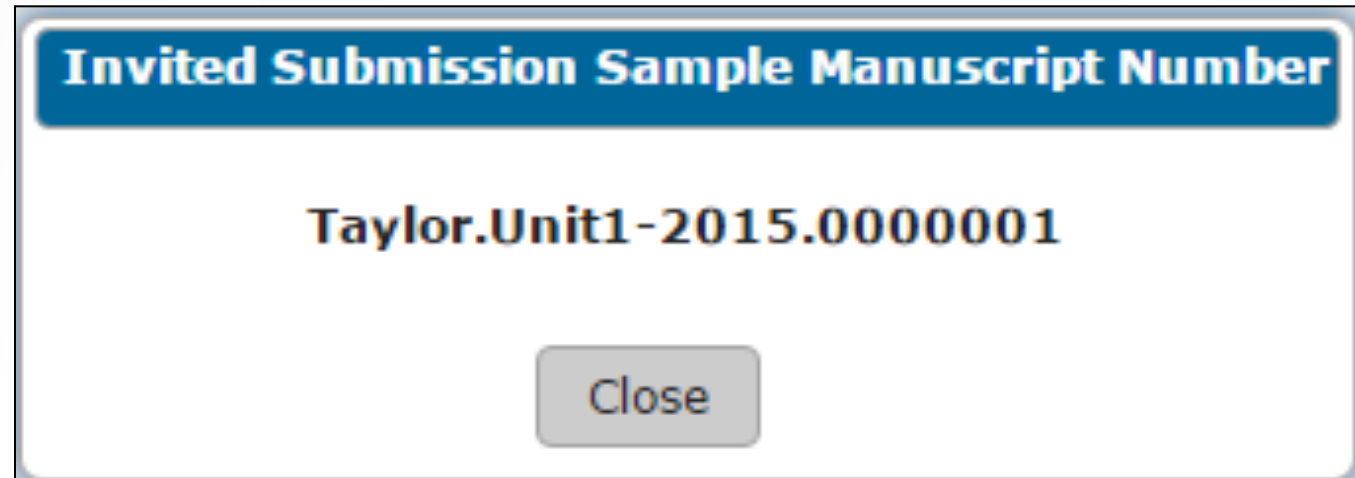
Example Workflow

A real page turner!

Book Processing Workflow

- Developmental Editor creates a Book in ProduXion Manager…

Book Processing Workflow

Book Processing Workflow

- Developmental Editor creates a Book in ProduXion Manager

- Developmental Editor creates Projects for each of the Author/Leader Editors participating in a Book
  - ✓ Projects are assigned to the Author/Leader Editor prior to Contributors being assigned…

Book Processing Workflow

Book Processing Workflow

- Developmental Editor creates a Book in ProduXion Manager

- Developmental Editor creates Projects for each of the Author/Leader Editors participating in a Book
  - ✓ Projects are assigned to the Author/Leader Editor prior to Contributors being assigned

- List of Contributors and their assignments are put together for each Project in a Book…

Book Processing Workflow

- Contributors receive assignments from a Project
  - ✓ Assignment may be performed by Developmental Editor or Author/Lead Editor
  - ✓ Assignments can be made using an uploaded file that contains the Contributor's information as well as metadata for the assigned submission…

Book Processing Workflow

Book Processing Workflow

Contributor Candidates

The Contributor 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 Contributors before importing the list.

To load the approved records into the 'Contributor 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	Mike	Di Natale	mdinatale@ariessys.com	0000-0002-0136-5875	Origin of Soups	Chapter 1	☐
True	Caroline	Webber	cwebber@ariessys.com	0000-0002-6783-1234	Mild Minestrone	Chapter 3	☐
True	Janet	Swatski	jsawtski@ariessys.com	0000-0003-6310-5785			☐
False	Sally	Ubnoske	subnoske@ariessys.com		Chowda Chowdown	Chapter 2	☐
True	Mike	Di Natale	mdinatale@ariessys.com	0000-0002-0136-5875		Chapter 4	☐

[Remove] [Import]

Book Processing Workflow

- Contributor receives assignment and submits using existing submission process...

Book Processing Workflow

- Once the submission is received, management of the manuscript begins at the Book level

- Submissions are automatically linked to the Book via association with the Project…

View Related Submissions for Manuscript Number CAROLINE-MANUAL-00004.

Contents: Submissions where one or more Contributors have submitted related manuscripts. The parent manuscript is listed first, with Related Submissions listed below the parent. The parent manuscript cannot be sorted.

Book: Caroline's new book
ISBN: 12321321312312
Edition: 3
Authors/Volume Editors: Alves, Mahoney, Ubnoske, Swatski

Page: 1 of 1 (1 total submissions)   Display [10 ▼] results per page.

Project

Action	Project Tracking Number	Project Type	Project Manuscript Title	Editor Originating Project	Initial Date of Project	Target Pub. Date	Target Pub. Volume	Status Date	Current Status	Final Disposition
Details ⚑ History Set Final Disposition Invite Contributor Similar Articles in MEDLINE	CAROLINE-MANUAL-00004	Book Unit	My required proposal title	Ed J Editor, MD	Mar 16 2016 12:32PM	Dec 30 2017 12:00AM	33	Mar 16 2016 12:33PM	Contributors Assigned	

Related Submissions

Action	Manuscript Number	Manuscript Type	Manuscript Title	Contributor Name	Initial Date Submitted		Status Date	Current Status	Editors Decision	Final Disposition	Target Number of Pages	Previous Edition Chapter	Previous Edition Number of Pages	Character count text	Text (ms pp)	Est. Text pp	Refs. (#)	Est. Ref. pp	Tables (number)	Est. Table pp	Black and White Image Count
View Submission Edit Submission Details ⚑ History Set Final Disposition Initiate Production Go to Submission Similar Articles in MEDLINE	CAROLINEDEV131-D-16-00030	Chapter	my chapter for book 4	Michael Dean Wagoner, MD	Mar 16 2016 12:39PM		May 9 2016 3:18PM	Sent Back to Contributor			0	15	25	1500	22	21	30	2	5	3	0

Book Processing Workflow

- Contributions display on the Book's Pre-Selected Submissions grid initially…

Actions	Target TOC Position	Manuscript Number ▲▼	Manuscript Type ▲▼	Title ▲▼	Editor Originating Project	Contributor Name	Target Number of Pages	Editorial Status	DOI	Previous Edition Chapter
	1	MIKETEST-D-201518	Book Unit	Chicken Stock Recipes	Mike Di Natale	11	Contributor Assigned to Project			
Details ⚑ Transmittal Form View Reviews and Comments		SOUPS-17-CHICKEN.0006	Chapter	Cajun-Style Chicken Soup		2	Submitted to Journal			
	7	MIKETEST-D-201519	Book Unit	Beef Soups	Mike Di Natale	11	Contributor Assigned to Project		0	
Details ⚑ Transmittal Form View Reviews and Comments		SOUPS-17-BEEF.0001	Chapter	Cabbage and Beef Soup		0	Submitted to Journal			

Book Processing Workflow

- And move to the Table of Contents once production is initiated…

Table of Contents

Actions	Target TOC Position	Manuscript Number	Manuscript Type	Title	Editor Originating Project	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI
Details Remove Header	1	MIKETEST-D-201518	Book Unit	Chicken Stock Recipes	Mike Di Natale	11	6	16		
Production Details Transmittal Form Remove from Group	2	SOUPS-17-CHICKEN.0001	Chapter	Chicken and Rice		2	7	8		10.11260000005
⊞ Additional Manuscript Details										
Production Details Transmittal Form Remove from Group	3	SOUPS-17-CHICKEN.0002	Chapter	Chicken Dumpling		2	9	10		10.11260000004
⊞ Additional Manuscript Details										
Production Details Transmittal Form Remove from Group	4	SOUPS-17-CHICKEN.0003	Chapter	Tortilla Soup		2	11	12		10.11260000003
⊞ Additional Manuscript Details										
Production Details Transmittal Form Remove from Group	5	SOUPS-17-CHICKEN.0004	Chapter	Mexican Chicken Tortellini		2	13	14		10.11260000002
⊞ Additional Manuscript Details										
Production Details Transmittal Form Remove from Group	6	SOUPS-17-CHICKEN.0005	Chapter	Classic Chicken Noodle		2	15	16		10.11260000001
⊞ Additional Manuscript Details										
Details Remove Header	7	MIKETEST-D-201519	Book Unit	Beef Soups	Mike Di Natale	11				

[Update TOC] [Insert Header]

Pre-selected Submissions

Actions	Target TOC Position	Manuscript Number ▲▼	Manuscript Type ▲▼	Title ▲▼	Editor Originating Project	Contributor Name	Target Number of Pages	Editorial Status	DOI	Previous Edition Chapter	Previous Edition pp	Cha Cou Tex
	1	MIKETEST-D-201518	Book Unit	Chicken Stock Recipes	Mike Di Natale		11	Contributor Assigned to Project				
Details Transmittal Form View Reviews and Comments		SOUPS-17-CHICKEN.0006	Chapter	Cajun-Style Chicken Soup			2	Submitted to Journal				
	7	MIKETEST-D-	Book Unit	Beef	Mike Di		11	Contributor		0	4545465	12

Book Processing Workflow

- Publisher can continue to manage the book from the *Edit Group Details* page

- Additional Projects and submissions can be added to the book as needed

- Content of a book can be copied over into future editions to be managed separately

Coming soon!

Features to be released in 14.0

BITS 2.0 Transmittal Method

- Book and Chapter Production Task Transmittal Methods

- Based on the 'JATS' XML

- XML includes Book-level and Book-part (unit/chapter) sections

- New fields added to Book metadata and written into BITS transmittal (along with existing book metadata fields)

  - ✓ Subtitle

  - ✓ Alt-title

  - ✓ Schedule Group DOI

  - ✓ Book ID

  - ✓ Copyright Statement, Copyright Year, Copyright Holder

BITS 2.0 Transmittal Method

Appears as new selection in "FTP Options" on the following pages:

- Edit Submission Task

- Edit Book Task

FTP Options

Group Task Transmittal Method:	BITS 2.0 Production Task Export ▾

☑ Allow task assignment and FTP without Assignment Files

☐ Include Aries Import XML file in transmittal

FTP Server Address(e.g ftp.ariessys.com):	
Username	
Password	
Subdirectory:	

Additional Book Details Fields

- New custom fields for use at the book level, configurable by publication
- Modeled on Additional Manuscript Detail fields for journals
- Can be viewed/edited on Edit Book Details page

Page Budget:	
Black and White Image Budget:	
Color Image Budget:	

□ **Additional Book Details**

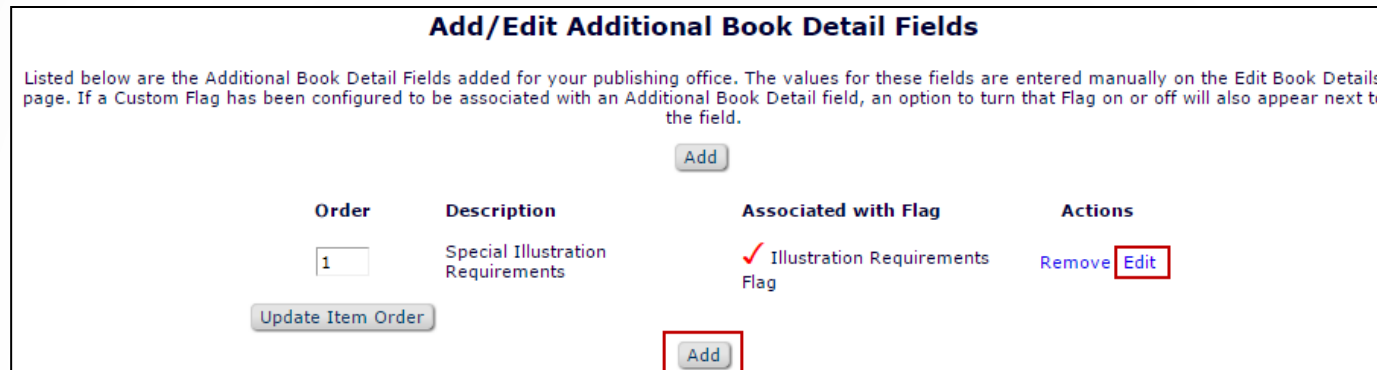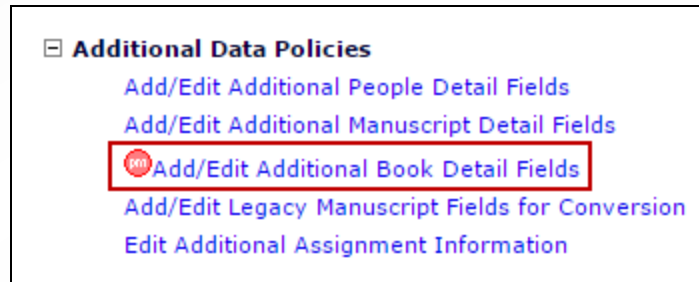| Special Illustration Requirements | | ☐ Display 'Illustration Requirements Flag' flag |

Additional Book Details Fields

Additional Book Details fields can be associated with flags, which will display on *Manage Books* page.

Additional Book Details Fields

Book Detail Fields can be configured in "Additional Data Policies" section of PolicyManager

Additional Book Details Fields

Configuration options determine whether:

- Field can be edited on "Edit Book Details"

- Field is included in BITS transmittals

- Field applies to issue or book workflows

Options

Select the 'Hide' checkbox to suppress the field on a particular screen. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Hidden' box is checked for BITS Transmittals, the data in this field will be excluded in BITS transmittals when applicable. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text.

The 'Issue Family' and 'Book Family' options control whether or not the custom field is available for a Book. Enable the 'Hide' option to prevent a custom field from being associated with a Book.

Page	Hide	Editable	Help Text
Edit Book Details	☐	☑	
BITS Transmittals	☐	N/A	
	Custom Metadata ID: ⓘ Select Custom Metadata ID		
Issue Family	☐	N/A	
Book Family	☐	N/A	

Additional Book Details Fields

Customized flags for use with Additional Book Detail Fields can be configured in "General Policies" section of PolicyManager.
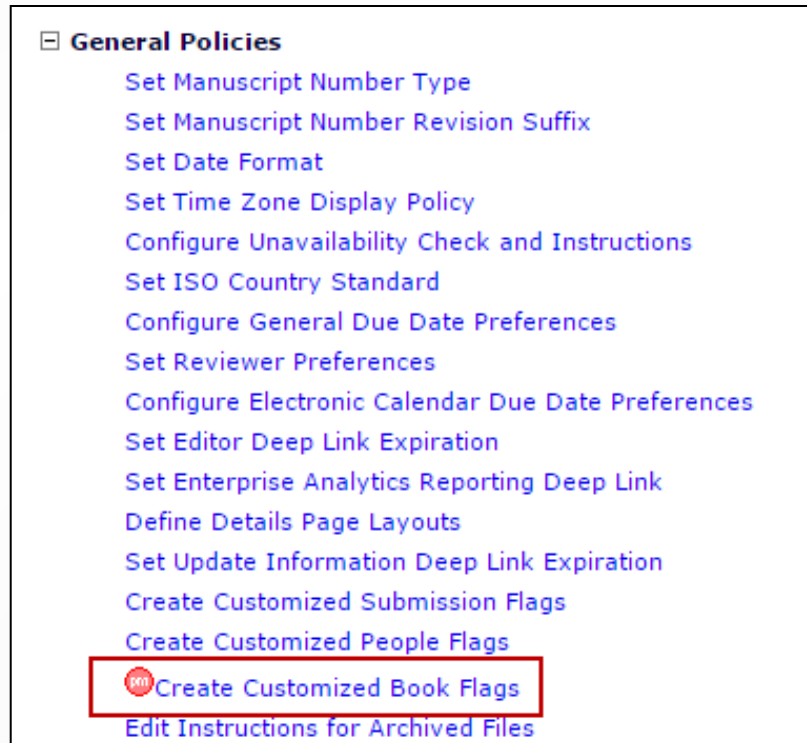
Additional Book Details Fields

The Edit Customized Book Flag page provides the option to associate a flag with ABD field

Discussion

What would you like to see in EM for Books?

![Editorial Manager for Books]
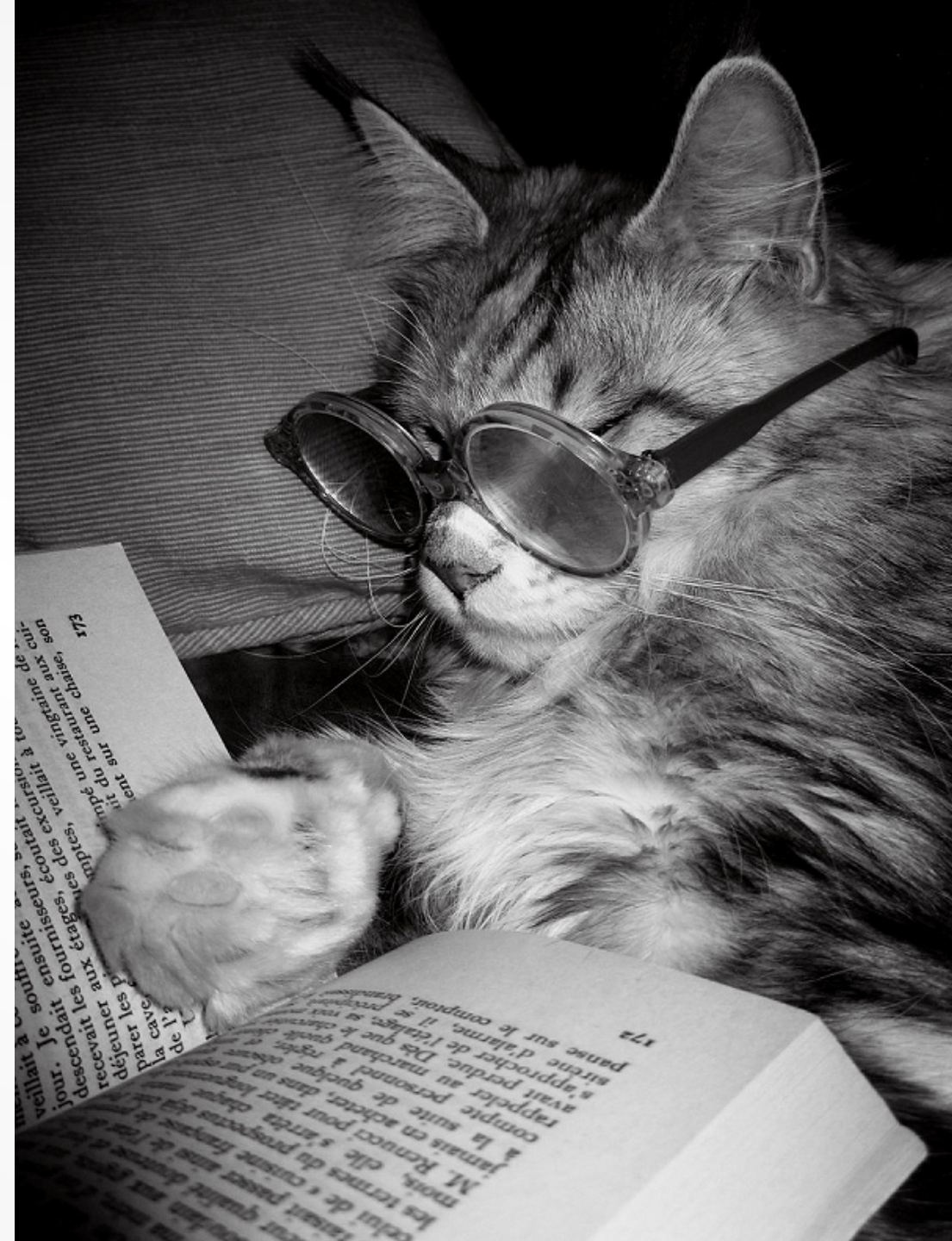
Thanks!

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Sam Sherman, ssherman@ariessys.com