



ADVANCED PUBLISHING SOLUTIONS



**Important**: Please note that working in Chrome might cause issues with the system; please use Internet Explorer or Firefox.

This guide is a working document and will be periodically updated and redistributed. Comments for revision should be addressed to Magdalena Malecka (magdalena.malecka@wolterskluwer.com)

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#### **CHAPTER 1: INTERFACE PUBLISHONE**

#### 1.0 LOGIN

You have received an e-mail notification informing you that a document has been assigned to you in the Authoring Tool PublishOne.

Please use the following link to open PublishOne installed on your computer (Please note that working in Chrome might cause issues with the system; please use Internet Explorer or Firefox):

https://kli-em.publishone.nl/Account/Login?ReturnUrl=%2F

Log in with your credentials (e-mail address and password provided by e-mail).

Please refer to the *Installation Instructions* for more information on the installation of PublishOne. If you have issues with your credentials, cannot login or forgot your password, please contact your dedicated Content Manager at Wolters Kluwer or your Content Coordinator. See Contact Us at the end of this document for more details.

Log in			
Email			
Password			
☐ Remember me?			
Log in			
Forgot your password?			

Figure 1.0.1

#### 1.1 OPTION TO RESET YOUR PASSWORD

If you forgot your password, you can reset it and get a new password by clicking on "Forgot password" link.

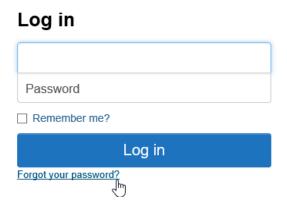


Figure 1.1.1

- 1. Click on the link Forgot your password?
- 2. Insert your email address

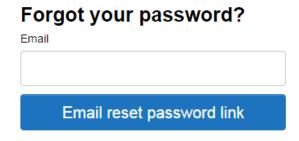


Figure 1.1.2

- 3. Click on the "Email Link" button
- 4. Open your mailbox (please check your spam folder if you did not receive an email in your inbox)
- 5. Click on the link in email and set a new password (a password must contain at least 1 digit and 1 character)
- 6. Insert a new password
- 7. Click on the "Reset" button
- 8. The password changed. Click on the link to return to the login screen

For more information, please see the instruction video Wolters Kluwer Authoring Tool PublishOne - How to install

#### 1.2 TABS INTERFACE

After logging in, the homepage of PublishOne will appear. Different tabs will be displayed.

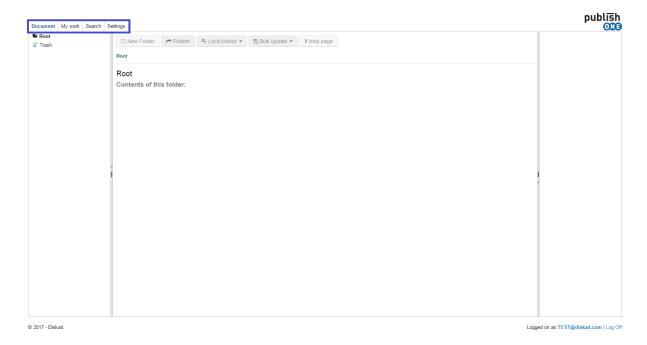


Figure 1.2.1

#### Tabs

- **Documents**: In this tab the documents can be found underneath "Root".
- My work: This tab will display the documents that are assigned to you.
- **Search**: Here you can search for documents.
- **Settings**: Here you can pick the theme (Standard/ Extensive), enable or disable email notifications and change your information, password or time zone.

Go to "My work" to see the document(s) assigned to you for revision.

#### 1.3 EXPLANATION OF TOC

On the left hand side of PublishOne the table of content (TOC) is shown. When you log in, the tree isn't expanded yet. Click on "Root" to see the first level of the tree.

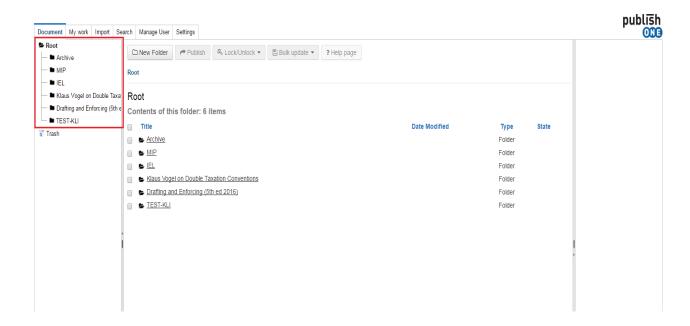


Figure 1.3.1

By clicking on the folder icons next to a publication or chapter you navigate to deeper levels.

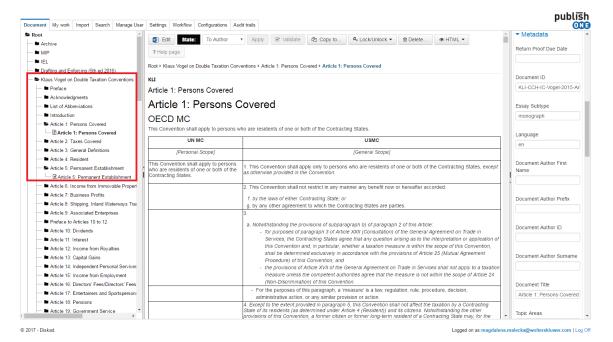


Figure 1.3.2

#### 1.4 EXPLANATION OF A DOCUMENT

If you have found a document via the TOC or via "My Work" you will see the next screen:

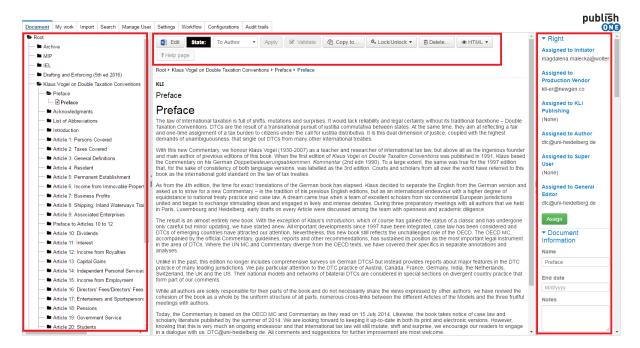


Figure 1.4.1

The page is divided into four parts:

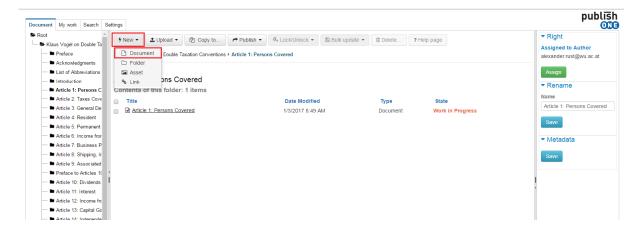
- left hand side of the screen shows a table of contents.
- middle of the screen shows a preview of your document.
- on the top of the screen, you see the options for editing a document. There are four steps of production: the document can be assigned "To Author", "To Editor" or "To Publisher" or be "In Production".
- right hand side shows document information, metadata and attachments.

Please refer to point 1.7 Workflow or to the instruction video Wolters Kluwer Authoring Tool PublishOne – Workflow for more information.

#### 1.5 CREATING A NEW CHAPTER/DOCUMENT

Note: Not applicable for Manual of Industrial Property (Brown Book) authors.

To create a new chapter in PublishOne, click on button "New" "at the top of the screen. Please select "Document" from the drop-down list.



*Figure 1.5.1* 

On the next screen you can name the chapter and the chapter can be created. The chapter will appear directly in the tree on the left (TOC) and central (content) area. If the new chapter does not appear, refresh the screen by pressing F5 or Ctrl+F5.

Once the new document is created, please contact your Content Manager by e-mail who will assign rights and roles to the document. (See the <u>Contact us</u> section at the end of this document for more information). In order to move your newly created document forward in the PublishOne process, names have to be assigned to the subsequent roles and only your Content Manager is able to do that. However, you can proceed working and editing in your new document in PublishOne, you can only move it to the next step in the process when your Content Manager has notified you that the roles have been assigned.

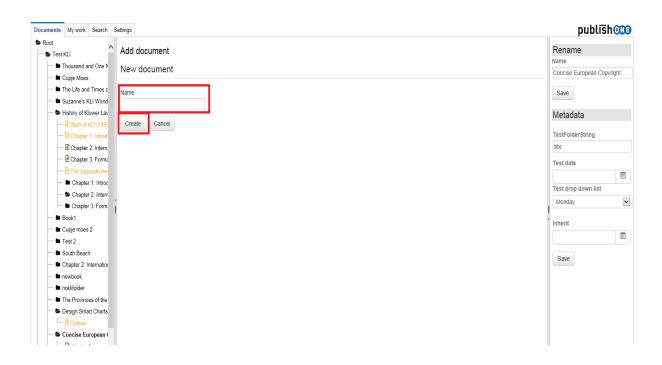


Figure 1.5.2

#### 1.6 ADDING IMAGES

To be able to add an image to a document, the image needs to be added in the editing environment of PublishOne. To do this, click on "New" button in the folder of the chapter or paragraph the image belongs to. Please select "Asset" from the drop-down menu

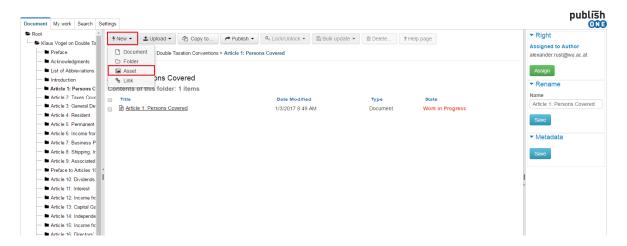


Figure 1.6.1

Give a name to the image click on the "Create" button.

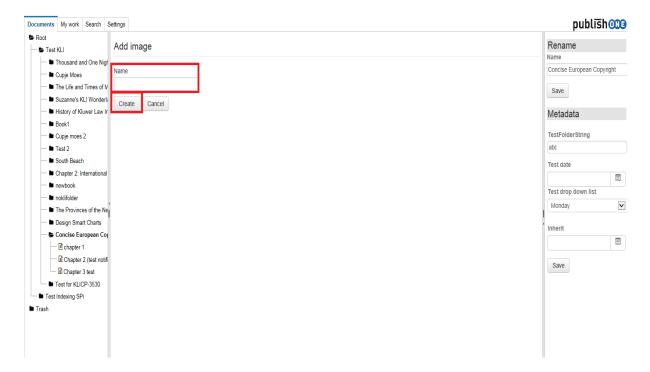


Figure 1.6.2

To upload your image, click on "Add file", choose the right image and double-click on it or press the "open" button. Please note that the format of the image should be gif-format or jpg-format. (.gif or .jpg).

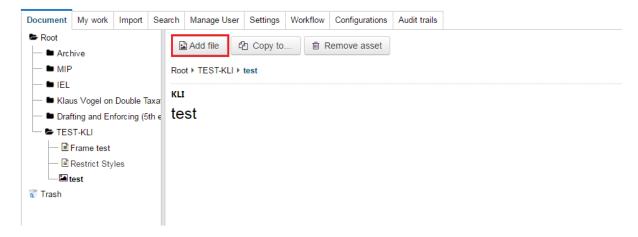


Figure 1.6.3

The image will be visible immediately. You can delete the image from the editing environment by clicking on the "Remove asset" button next to the image.

To add the image in the Word environment, please see paragraph 4.5 Images.

For more information, please see the instruction video Wolters <u>Kluwer Authoring Tool PublishOne - How to insert</u> an <u>image.</u>

#### 1.7 CHANGING DOCUMENT TITLES

Note: Not applicable for Manual of Industrial Property (Brown Book) authors.

To change the name of a document, enter a new title in the field "Document title" on the right side of your screen and click "Save" (scroll down to the bottom of the Metadata column)

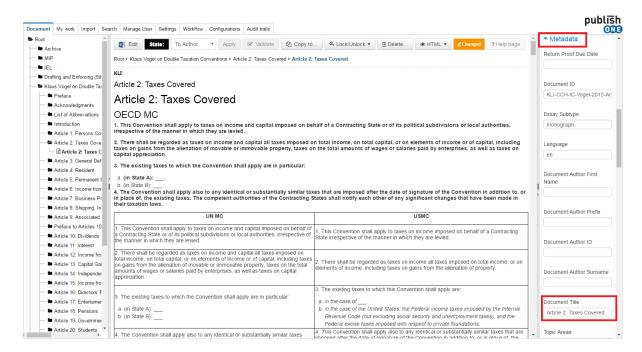


Figure 1.7.1

#### 1.8 WORKFLOW

The workflow of a document in PublishOne exists of two steps for the author:

**To Author**: The document is assigned to you by the initiator at Wolters Kluwer and you can work in the document. A document will be in the status "To Author" at two different stages:

- 1. A document is assigned to you for an update;
- 2. The proof of your work is almost ready for publication and is assigned to you for final approval. At this stage, you will have the possibility to make some minor amendments before publication.

**To Editor**: You have finalized the update of the work and want to assign it to the General Editor for revision. Click on the drop-down menu next to the status "To Author", select the state "**To Editor**" and then click on "Apply" button.

Note: If there is no General Editor involved in the process (for Books), please directly select the status "**To Publisher**" and click on "Apply".



Figure 1.8.1

**In Production**: The proof of your work has been assigned to you for approval, so it's again in status "**To Author**". You have the possibility to make minor corrections before publication. Once you've checked the proof and think it's ready for publication, you will assign it back to the Project Manager, by selecting the state "**In Production**" and clicking on "Apply".

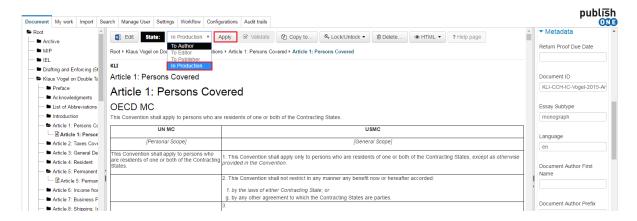


Figure 1.8.2

For more information, please see the instruction video Wolters Kluwer Authoring Tool PublishOne – Workflow.

#### 1.9 EDITING A DOCUMENT IN WORD

To edit a document, go to "My work" and click on the title of a document. You will be guided to the document and will see the screen shown below. You can start editing in Microsoft Word by going to the tool bar at the top of your screen and clicking on the second icon from the left showing a pen (the "Edit" button).



Figure 1.9.1

The below window's pop-up will appear.

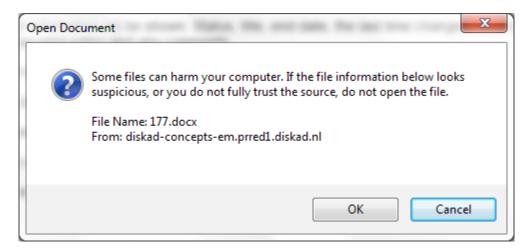


Figure 1.9.2

On the window's pop-up, press the "OK" button to download the file to your system.

Microsoft Word will open on your screen. You will see the "PublishOne" ribbon in the tool bar at the top of the Word document page, which indicates that you are working in PublishOne.

For more information on "how to edit", please see the instruction video Wolters Kluwer Authoring Tool PublishOne - General Introduction.

Chapter 4 of this document will discuss the work in the Word environment of PublishOne.

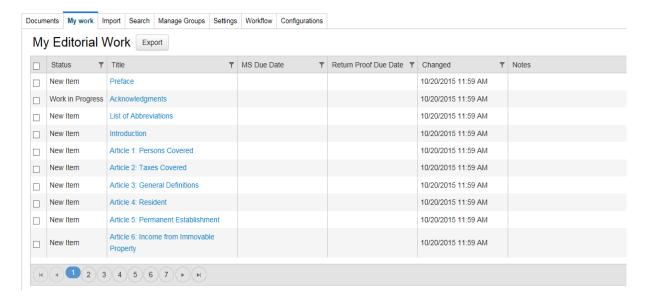
#### CHAPTER 2: MY WORK

#### 2.1 EXPLANATION OF "MY WORK"

To start, click on "My work" at the right top. Here you can see the documents which are assigned to you by the initiator at Wolters Kluwer.

For every document the next information will be shown:

- Status: "To Author": the files with this status are assigned to you.
- Title: click here to see the document
- Changed: the last date changes have been made.
- Notes: instructions and comments for the author will be displayed under "Notes"



#### 2.2 FILTERING AND SORTING DOCUMENTS

To sort all the visible documents under the tab "My work", click on the filter icon next to the features of the document. You can filter the documents on status, title, MS due date, the last time changes have been made to the document and notes. If you click on the title of the feature the display will change from ascending to descending or the other way around.

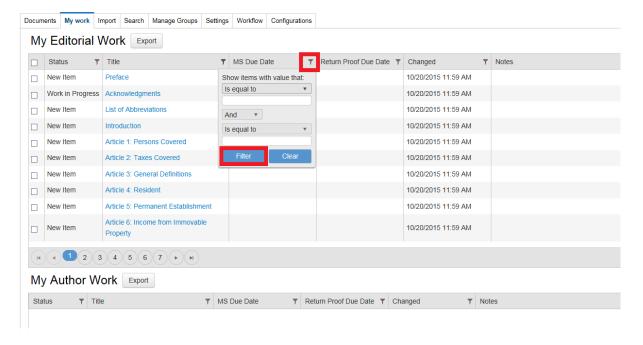


Figure 2.2.1

#### **CHAPTER 3: SEARCHING**

#### 3.1 To SEARCH

To search through the documents of PublishOne, click on "Search" at the top of the screen. Enter the keyword and click on search. The search results can be specified under the "sorting options". The search results can be sorted on relevance, title, end date, and the last time changes have been made to the document. There is a choice to display the search results in ascending or descending order and how many search results will be visible per page.

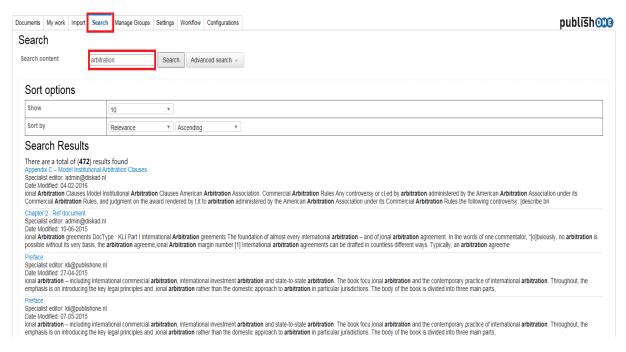


Figure 3.1.1

#### 3.2 ADVANCED SEARCHING

Next to the "Search" button there is an option for "Advanced search". With this function you can search by:

- Title
- Author
- Editor
- End date
- Date modified (date when last changes have been made to the document)

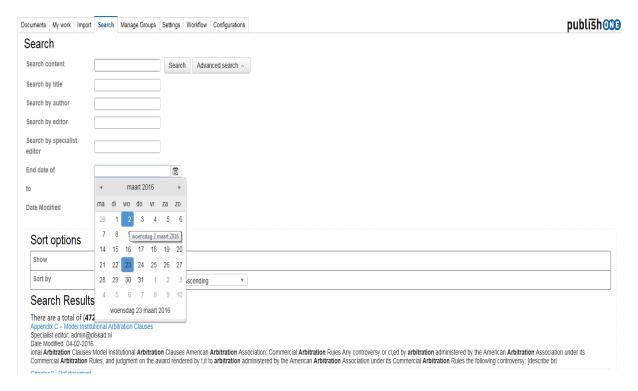


Figure 3.2.1

#### CHAPTER 4: MICROSOFT WORD ENVIRONMENT

#### 4.1 EXPLANATION OF THE PUBLISHONE RIBBON

When you open a document in Word, you will see the PublishOne ribbon next to "File, on the left hand side of the screen.

In this chapter, different functions of the ribbon will be explained. In figure 4.1.1 you can see the PublishOne and where the functions are.

#### Please only work within the PublishOne ribbon.

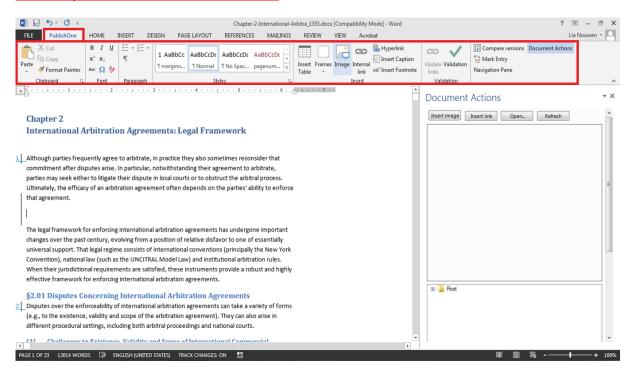


Figure 4.1.1

#### 4.2 HEADINGS AND STYLES

Note: Not applicable for Manual of Industrial Property (Brown Book) authors.

To apply the right style to a text, click on the arrow next to the "styles". All selected headings and styles will be visible (see figure 4.2.1). Select the text to which you want to apply the heading or style and click on the wanted heading or style.

It is important that you only use styles from the PublishOne ribbon.

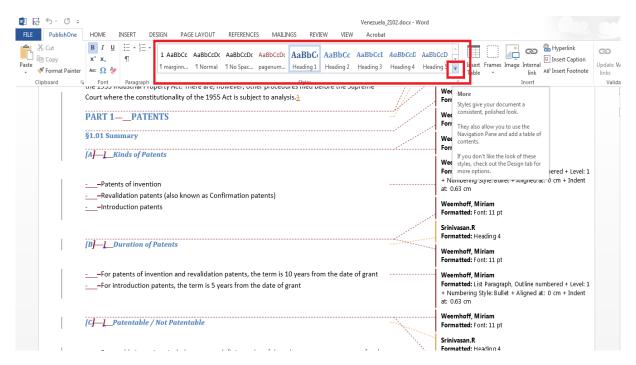


Figure 4.2.1

#### 4.3 TABLES

By clicking on "Insert table" in the PublishOne ribbon, you can add a table to your document. To design the table further you can use the extra options as shown in figure 4.3 2.

For more information, please see instruction video <u>Wolters Kluwer Authoring Tool PublishOne - How to create tables.</u>

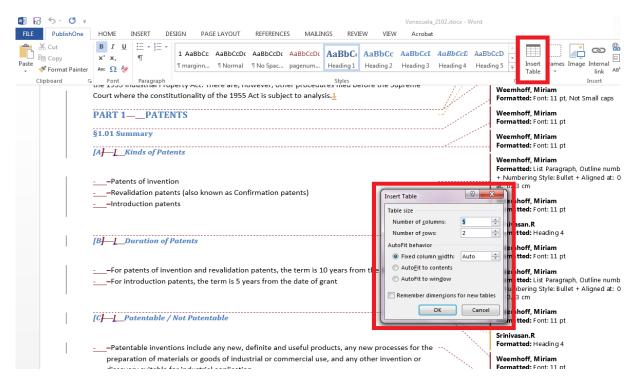


Figure 4.3.1

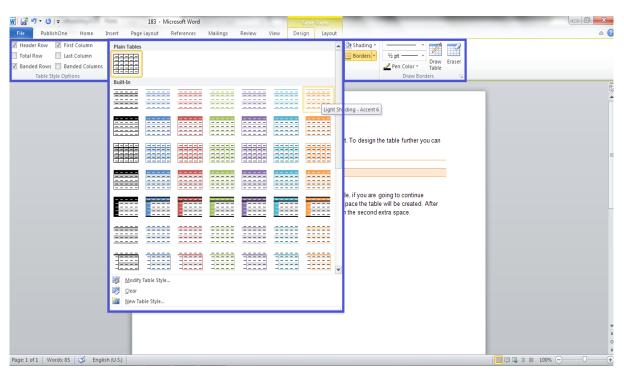


Figure 4.3.2

#### 4.4 FRAMES

Note: Not applicable for Manual of Industrial Property (Brown Book) authors.

To insert some text inside a frame, you first have to add a new extra space below the previous text. Move your cursor to this extra space and choose the right frame. The frame will appear and the text can be placed inside. You don't need to delete the extra space underneath the frame.

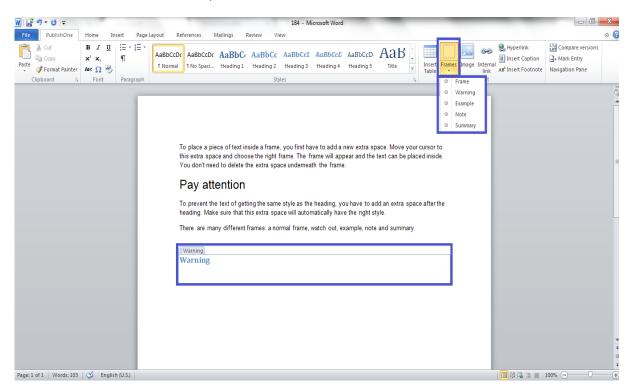


Figure 4.4.1

**Note**: To prevent the text of getting the same style as the heading, add an extra space after the heading.

#### 4.5 IMAGES

**Note**: Before moving on to the instructions below, please make sure you first follow the steps described in paragraph <u>1.5 Adding images</u>.

After uploading the image in the system according to the instructions in para. 1.5, you can insert the image in the Word document.

To do this, select the document you want to edit, press the "edit" button and go to the position in the file where you want to add the image.

In the PublishOne ribbon at the top of your screen, you'll see the "Image" button.

Click on the "Image" button and a pane will open on the right hand side of the screen, where you can navigate to the location where you just uploaded your image.

You'll get a preview of the image you're about to insert into the Word document.

Once you have done this, you can save the file and close it.

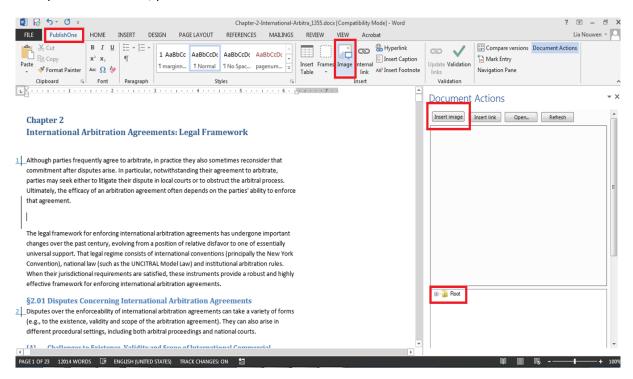


Figure 4.5.1

Note: The preferred format for Images is gif-format (.gif). Also allowed is jpg-format (.jpg)

For more information, please see instruction video <u>Wolters Kluwer Authoring Tool PublishOne - How to insert an image.</u>

#### 4.6 WEB LINKS

In the "PublishOne" tab, click on "Hyperlink" to add a link. Enter the web link in the windows' pop-up and click on "ok".

**Note**: It is important to always add http:// when the link starts with www. To add the right link immediately it is recommended to copy and paste the link straight from address bar from the browser.

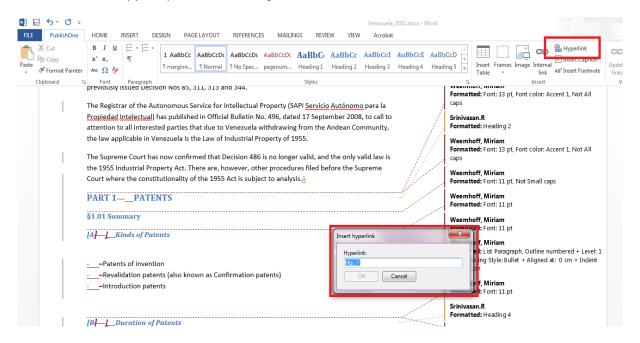


Figure 4.6.1

#### 4.7 INTERNAL LINKS

In the Word document you can link to another document or to a numbered paragraph (margin number) in the same or in another document of a publication. To do this, open the document in Word in PublishOne by selecting the document and clicking on the "Edit" button at the top of your screen.

Go to the PublishOne ribbon at the top of your screen, click on the "Internal link" button and navigate to the margin number you want to create a link to. To do this, you'll see the entire tree structure of the document on the right hand side of your screen (panel 'Document Actions' will appear with the folder 'root') which indicates all the different levels of the document (for instance Chapters and sections).

Look for the document that has to be linked to the current one. Select the text that you want to change into a link, select the document in the pop-up screen and click on "Insert link".

Sometimes you will need a new margin number. You can create new margin numbers by selecting the paragraph and clicking on the Margin number style in the PublishOne ribbon: all the margin numbers will automatically be recalculated and get a correct number.

To check your new margin number has been inserted correctly, toggle (flick) back to your Word document and there you should see your new margin number inserted. If you save and close and open the document again, the "dead link" button is activated meaning that some of the links in your document need to be updated. To update the links, click on the button "Update links" and the entire document will be updated. This is a final step you should take to make sure that all the links are valid again.

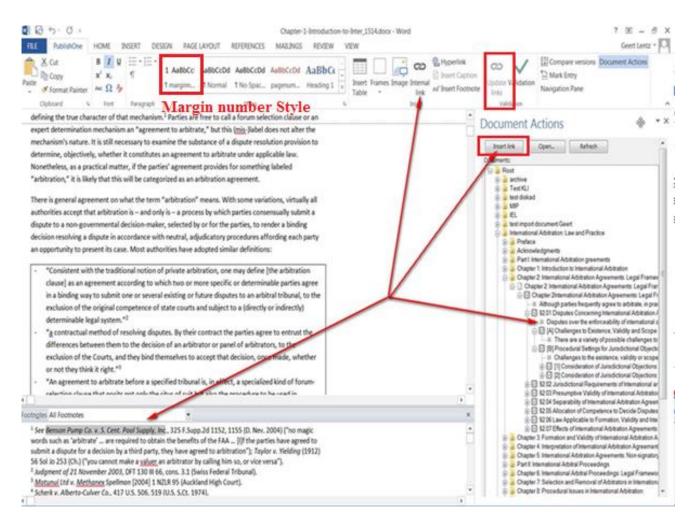


Figure 4.7.1

For more information, please see instruction video Wolters Kluwer Authoring Tool PublishOne - How to link

#### 4.8 VALIDATION

Before assigning your work for revision, please click on the "Validation" button in the PublishOne ribbon. During the validation process, any errors will be listed on the right side of your screen. If you click on any of the errors listed, you'll jump to where the error is in your document.

You can then make your corrections, press the "Validation" button again and save and close the document.

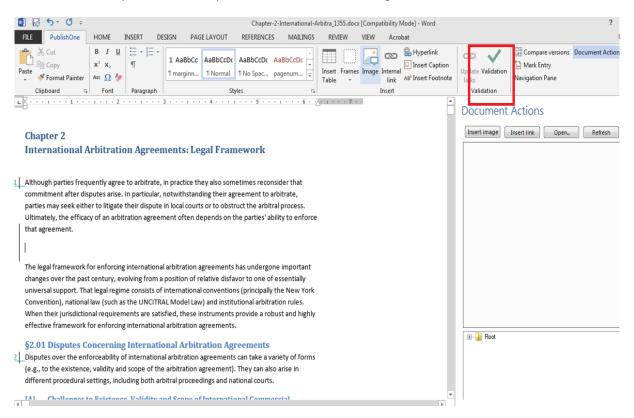


Figure 4.8.1

#### CHAPTER 5: WORKING OFFLINE

If you want to work offline, you can use the 'check-in/check-out' functionality in PublishOne. To do this, select the chapter to check out by clicking on the check box of the relevant document(s).

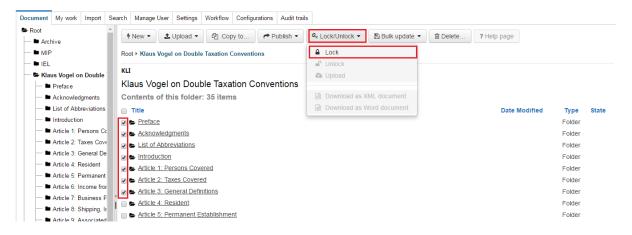


Figure 5.1.=

Click on the "Lock/Unlock" button above the heading of your document(s). Select "Lock" from the drop-down menu. Then select the chapters that you want to download once again and click on the Word icon to check out the document in Microsoft Word.

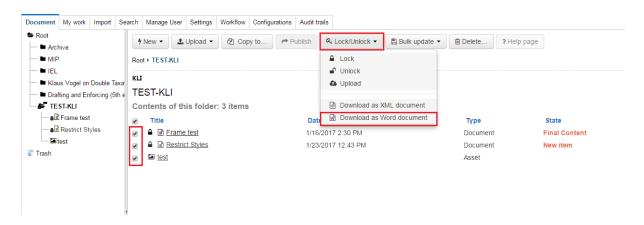


Figure 5.2

A zip file containing the Word file(s) that you've chosen to edit will automatically start downloading on your device. Once the download is completed, files will be saved in the "Downloads" folder and titled "Export.zip".

You can also access the files by clicking on the downloaded zip file at the bottom of the screen.

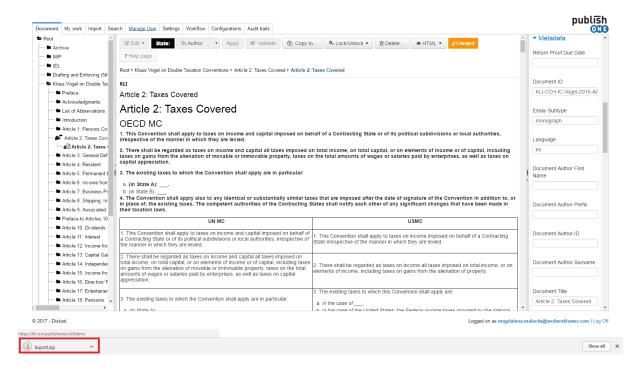


Figure 5.3

You can now extract the Word file(s) from the zip file and start working in the Word document. It is important to remember that the file name of the Word document should never be changed.

#### Important: Do not change the file name.

Once you've opened the Word file you will see the PublishOne ribbon and you can start editing the document in Word. When you are finished, save and close your document.

When you are online again, you can upload the Word document that you've edited on your local machine back into PublishOne.

To do this, open PublishOne, click on the "Lock/Unlock" buttonand then click "Upload" function listed in the drop-down menu. Select the file location where you've stored the file. The document will be uploaded and if the upload is successful, you will see a green icon indicating that the document status has been updated.

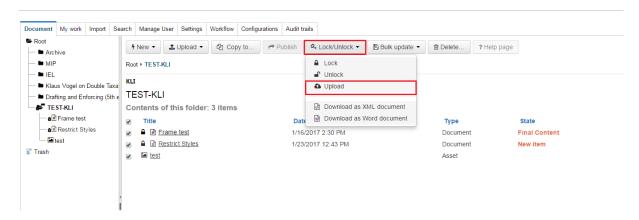


Figure 5.4

To view the changes you've made, open the document in Word in PublishOne.

You can now, in PublishOne, assign the document to the relevant person.

Final step: To give access/unlock to the document, **click "Lock/Unlock" button and select "Unlock" function** from the drop-down menu.

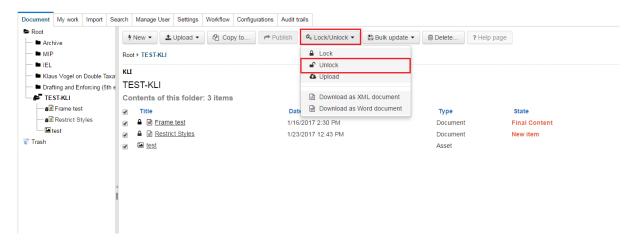


Figure 5.5

For more information, please see the video Wolters Kluwer Authoring Tool PublishOne - How to work offline.

#### CHAPTER 6: PREVIEW CONTENT IN FINAL PDF LAYOUT

If you want to preview your work in a PDF format, navigate in PublishOne to the chapter you want to preview and click on the "HTML" button. Then select "PDF" from the drop-down list.

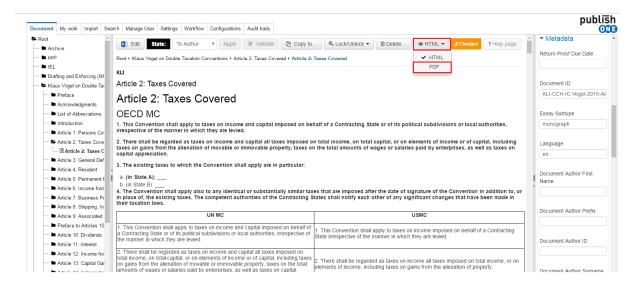


Figure 6.1

Select your relevant template (for instance select "kli-iel" for an IEL or "kli-mip" for a Manual IP chapter) and click on the "trial publication to PDF" button. You can choose to open the file in a current or a new window.

Note: Vogel authors should select "KLI-Born" publication type

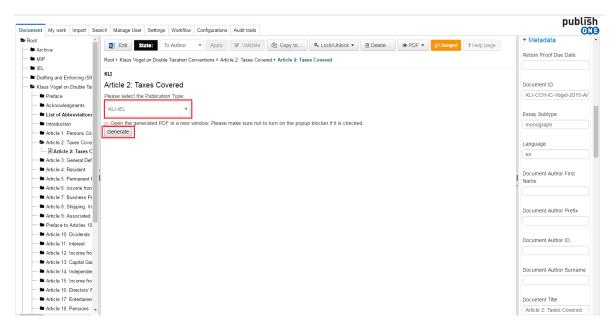


Figure 6.2

#### ANNEXES

**INSTRUCTION VIDEOS** 

PublishOne General Introduction

PublishOne How to install

PublishOne Workflow

PublishOne How to create tables

PublishOne How to insert an image

PublishOne How to link

PublishOne How to work offline

PublishOne How to preview your content in the final layout

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