About This Guide

**Who should use it**

This guide is intended primarily for Elsa Editors/Authors. It is not intended for use by Contributors, as Contributors have different roles and permissions in Elsa and may not have access to all the same features as Elsa Editors/Authors.

This guide will be updated as needed when new features are added to Elsa or for clarification and addition of information.

If you cannot find the information you need in this guide, please visit the Elsa Support Center.
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1. Getting Started

1.1. What You’ll Need

To get started in Elsa, you’ll need these things:

- Connection to the Internet
- Google Chrome Browser

Elsa works best in Google Chrome, so it is recommended that you use the most updated version of Chrome. For more information, or to download Google Chrome, visit: Google Chrome

1.2. Finding Help

Elsa has its own dedicated team of User Support Specialists. Content Managers, Editors/Authors, and Contributors are encouraged to contact User Support for help when they need it.

To access the Elsa Support Center, User Guides, and to contact Elsa User Support Specialists, click on the help icon at the top of the screen.

Support is available in English via the following numbers:

<table>
<thead>
<tr>
<th>Region</th>
<th>Contact number</th>
<th>Opening Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>US, Canada, and Mexico</td>
<td>+1 800 562 1197</td>
<td>9:00 a.m. to 5:00 p.m. Central Time – Monday - Friday</td>
</tr>
<tr>
<td>Europe</td>
<td>+44 1865 844625</td>
<td>3:00 p.m. to 11:00 p.m. GMT – Monday - Friday</td>
</tr>
</tbody>
</table>
2. Navigating Elsa

Dashboards and Tabs help keep you organized and make it easier for you to find your way around Elsa.

Some Dashboard components are permission-based, so other Users may not have access to the same Tabs as you do.

2.1. Dashboard Components

- **Projects**
  - The Projects list shows all projects you are collaborating on.

- **All Assignments**
  - The All Assignments list shows chapters assigned to you and chapters assigned to your role.

- **Help**
  - Click on the help icon 🎨 to access FAQs and request help from Elsa User Support Reps.

- **Avatar**
  - Clicking on your Avatar will allow you to access your Elsa Profile, Elsevier Account Settings, and Sign Out of Elsa.
Note: For help with your Elsevier Account, visit the Elsevier Access Support Center: https://service.elsevier.com/app/home/supporthub/elsevieraccess/

2.2. All Assignments

All Assignments helps Users know what is assigned to them and which chapters they are currently editing. There are two tabs under All Assignments, You and Work in Progress.
2.3. You

The You tab includes both Your Assignments and an Assignment Pool, with the total number of assignments indicated at the top.

Your Assignments are chapters that have been assigned to you directly. You can see which project the chapter is from, the due date, which stage needs to be completed, when the chapter was sent, and who sent it to you.

Chapters in the Assignment Pool are chapters that have been sent to your role, not to you specifically. If the next step in the workflow indicates your role, the chapters will be displayed here. Sometimes more than one User will be assigned to a role. In those cases, anyone in that role can edit the document. You can tell if the chapter is being edited if the Private icon appears next to the chapter and the User’s avatar is present.
2.4. Work in Progress

The *Work in Progress* tab shows all chapters that you are currently editing. It is important to remember that these chapters are not accessible to other Users while you are editing the chapter. To make them available for editing by other Users, you need to send the chapter.

For more information about *Share/Send*, see the [Privacy chapter](#).
3. Starting Your Project

Once your Content Manager has created a new project and added you as Editor/Author, the project will appear in your Project List. Click on the chapter title to be taken to the Project Overview.

As the Editor/Author, you can now build the Table of Contents.

3.1. Project List and Project Overview

From your Project List, click on the project title to be taken to the Project Overview Page.

Once on the project overview page, click on Table of Contents.

3.2. Creating a Table of Contents
To create your Table of Contents, first set the auto-numbering options for the Table of Contents and click Set.
If you need to revisit Auto-Numbering, click on the more button on the right action bar and select ‘Set Auto-Numbering’ from the dropdown menu.
Once auto-numbering is set, click the ‘Add Part’ icon to start adding parts to the TOC.

Click Add.

**Note:** Parts will automatically be numbered, so there is no need to add part numbers to your part title.
To continue adding to your TOC, click on the more button and choose ‘Add Chapter,’ ‘Add Part, or ‘Add Section’ and fill out the information as prompted.

Remember, while the TOC has been in private, the changes you have made were not visible to anyone else. When you’re ready, click the ‘Share’ button on the right action bar to update the Read-Only version of the TOC.
3.3. Editing a Table of Contents

As with chapters, the Table of Contents can only be edited by one person at a time. The Public icon indicates that this is the public version of the TOC and it is read-only. To edit the TOC, click on Edit Table of Contents.

Note: Contributors do not have permission to edit the Table of Contents.
Once you have clicked on *Edit Table of Contents* you will see the *Private* icon, which means you are editing the TOC. No one else will be able to edit the TOC until you share the TOC. Any changes you make to the TOC while it is in private will not be available in the public read-only version until you click share.

**Note:** If you have invited Contributors to chapters in the project, sharing the TOC will trigger those invites to be sent.
### 3.4. The TOC Toolbar

The TOC toolbar gives you quick options to edit move content around your TOC. Hovering your cursor over the icons will reveal what each icon can be used for.

<table>
<thead>
<tr>
<th>Move Up</th>
<th>Move Down</th>
<th>Move Out of Part or Section</th>
<th>Move into Part or Section</th>
<th>Add Contributor</th>
<th>Delete</th>
</tr>
</thead>
</table>

Clicking the more button next to a part, section, or chapter will give you more options.
Clicking more on the Right Action Bar will also reveal more options for editing.

3.5. Adding and Inviting Contributors to the Project

Editors/Authors can invite both existing Elsa Users and new Elsa Users as Contributors to a project form the TOC.
**Note:** You must edit the TOC to add Contributors.

Click on the more button next to a chapter and select ‘Add/Edit Contributors’ from the dropdown menu.
A new window will open. At top, you’ll see your existing Team Members. You can search for any existing Elsa Users that already have accounts.
You can also create New Users to add to your project.

Once you’ve selected Contributors for your project, you can designate Senior Contributor. Once you designate a Senior Contributor, an asterisk will appear in front of their name in the Table of Contents.
To create a new user, click on **Create New** and then fill in the new User’s full name and email address. You can designate Senior Contributor at this time, but it is not required.
Click Create.

The new User is now added to the list of selected Contributors for this chapter.

Click Next.
If you created a new User, you will get a message informing you that the new User will be invited to the project team. You will also have the option of including a personalized message in the invitation.

Click Add.
After you click *Add*, you’ll be taken back to the TOC and a message will display with the number of Contributors you have added. Invitations will not be sent until you have shared the Table of Contents.

When you share the Table of Contents, you will be notified the number of invitations that have been sent.
3.1. Invitations

When a Contributor is invited to a project, they will receive an email from Elsa with a link to create an account or sign into an existing account.

Note: For help with Elsevier Accounts, visit the Elsevier Access Support Center: https://service.elsevier.com/app/home/supporthub/elsevieraccess/
3.1. The Team Page

From the Team Page, you can keep track of all your project’s Team Members.

Click on the Team icon to launch the Team page.
From the Team page you can see information about each Team Member, including the last time they accessed the project.
3.2. Project Overview

When you click on a project name, you’ll be taken to the Project Overview page.

From the Project Overview page, you can see all chapters in a project, their progress, due dates, who is currently editing the chapters, and chapter notes.

Note: The icon next to the chapter name indicates that a User is currently editing the chapter and it is not accessible for anyone else to edit. Hover over the icon to see who is editing the chapter.

3.2.1. Changing Due Dates

You can change due dates either individually or in bulk from the Project Overview page.

To individually change a due date:
Click on Set Date for the chapter and workflow stage to which you wish to set or change the due date.

To set due dates in bulk:

Select all chapters by clicking on the box at the top left of the screen. To select multiple, but not all, chapters, click on the box at the left of the chapter name to select. Once you’ve selected your chapters, click on the calendar symbol.
**Note:** You can still change a due date on a chapter even if a User is editing the chapter and it is private.

**Note:** Content Managers can also go back to assign default due dates by clicking on the gear icon next to the project title.
4. Privacy

To allow Editors/Authors and Contributors privacy when working in their chapters, Elsa only allows one User to work in a chapter at a time.

4.1. Public and Private

The Public icon indicates that you are viewing the public, read-only version of this chapter. When the Edit Document link is available, it means that you have access to edit this chapter.

When you click on Edit Document, you will be given access to edit the chapter. The icon will now display Private, indicating that you are looking at the private version of the document. You are the only one who will be able to see the document until you share or send the chapter.
4.2. Share and Send

The Share button and the Send button are found in the Right Action Bar.

Share: When you are editing a chapter, clicking on Share will update the read-only version of the chapter. The chapter will remain in the same step in the workflow.

Send: Sending also updates the read-only version of the chapter, but instead of remaining in the same step in the workflow, sending will move the chapter to another step in the workflow.

4.3. Unavailable to Edit

The icon next to a chapter name indicates that a user is currently editing the chapter. Hover over the icon to show who is editing the chapter.
4.4. Read Only

Clicking on a chapter someone else is editing will take you to the read-only version of that chapter. The Public icon indicates that you are looking at the most recent read-only version of the chapter. The User editing the chapter may be making changes to the chapter, but those changes won’t be available for you to view in a read-only version until that User editing the chapter clicks share or send.
5. Write Space

The Write Space is where content is created and edited. Users will upload Figures, create Tables, leave comments for their chapter Co-Contributors, and more.

The Write Space includes these tabs:

1) **Write**: Author and edit chapters here, including inserting Figures, Tables, and References
2) **Activity & Versions**: Compare between two version histories
3) **Files**: Upload supplementary materials to share with other Users who have access to the chapter
4) **Figures**: Upload and manage Figures in the Figures Library
5) **References**: Upload references from PubMed, as an. ris file, or manually enter references
6) **Tables**: The Tables Library is where you can create and edit tables

5.1. Automatic Print Layout

Print Templates are selected when a new project is created. Elsa will automatically format the chapter to adhere to the Print Template, and although not available yet, Print Preview will allow Users to see how their chapter will be formatted for print at any time.

5.2. Import From Word

Elsa allows for documents created in Word to be imported via the Write Space. It is important to note that Figures, Tables, Equations and Formulas do not import from Word to Elsa.
To import a Word document, you must have a chapter in *Private*. Once you are editing the chapter and it is in private, click on the *Word Import* icon in the top toolbar.

Choose a Word doc from your computer and click *Import*.

**Note:** Not all Word formatting will import correctly from Word to Elsa. Make sure to check your content and adjust manually in Elsa as needed.
6. Write

The Write tab is where Users will input and edit the text of their chapters, as well as tag content, leave comments for Co-Contributors, and insert references, among other actions.

6.1. The Plus Sign

The plus sign is an important way to author and edit a chapter. The plus sign appears in the write space when you hover your curser in between content, such as between two paragraphs like the example above. When the plus sign appears, clicking on it will reveal a dropdown menu with options for building your chapter.

Note: The options available to you in the dropdown menu adhere to the print template, so you won’t be presented with any options that you’re not allowed to insert.

Once you’ve added paragraphs or other elements to your chapter, you can quickly add another element of the same type by hitting enter. For example, once you’ve come to the end of one paragraph, hit enter to quickly add another right below.

To delete a paragraph or list, hit backspace on your keyboard.
6.2. The Toolbar

The top toolbar gives you quick options to format your text, move content around your chapter, insert Figures, and more. Hovering your cursor over the icons will reveal what each icon can be used for.

6.2.1. Toolbar Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Bold selected text</td>
</tr>
<tr>
<td>i</td>
<td>Italicize selected text</td>
</tr>
<tr>
<td>u</td>
<td>Underline selected text</td>
</tr>
<tr>
<td>x²</td>
<td>Make text superscript</td>
</tr>
<tr>
<td>x₂</td>
<td>Make text subscript</td>
</tr>
<tr>
<td>≯</td>
<td>Outdent</td>
</tr>
<tr>
<td>≮</td>
<td>Indent</td>
</tr>
<tr>
<td>↑</td>
<td>Move content up</td>
</tr>
<tr>
<td>↓</td>
<td>Move content down</td>
</tr>
<tr>
<td>🌑</td>
<td>Insert special symbols into text</td>
</tr>
<tr>
<td>🔗</td>
<td>Insert link into text</td>
</tr>
<tr>
<td>📞</td>
<td>Add a tag</td>
</tr>
<tr>
<td>📝</td>
<td>Add a comment or a chapter note</td>
</tr>
<tr>
<td>📊</td>
<td>Insert a Figure</td>
</tr>
<tr>
<td>📊</td>
<td>Insert a Table</td>
</tr>
<tr>
<td>⍝</td>
<td>Insert an inline Formula</td>
</tr>
<tr>
<td>⬣</td>
<td>Insert a Reference</td>
</tr>
<tr>
<td>🕵️</td>
<td>Spellcheck</td>
</tr>
</tbody>
</table>
6.3. Right Action Bar

The Right Action Bar gives you more options for your chapter, such as sharing and sending.

Clicking on the *ellipsis* will give you more options:

- Keyboard shortcuts
- Show Changes

6.4. Right Action Bar Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Share</td>
</tr>
<tr>
<td>📩</td>
<td>Send</td>
</tr>
<tr>
<td>🗂️</td>
<td>Tags: Chapter keyword and content tags</td>
</tr>
<tr>
<td>🙋‍♂️</td>
<td>Comments and Notes</td>
</tr>
<tr>
<td>⬟️</td>
<td>More</td>
</tr>
</tbody>
</table>
For more detailed information on functions available from the Right Action Bar, see these parts of this User Guide:

- Share and Send
- Content Enrichment (Tags)
- Comments and Notes

### 6.5. Moving Content

You can move paragraphs, headers, bullets, figures, or other elements of your chapter by using the toolbar or by using keyboard shortcuts.

Select the content you wish to change either by clicking directly in the text or by selecting the content from the *Outline*. Then, use the up or down icons on the toolbar to move the content, or press ctrl + up or down on your keyboard.

Use the same process to outdent or indent lists.
If you are not allowed to move content, the outdent/indent, up/down icons will be grayed out and not available to use.

### 6.6. Changing Content

Text elements, such as paragraphs and headers, can be changed using the *Outline* pane.
When you click on various text elements, you can tell what kind of content it is by looking above the Outline. In this example, the chosen element is a paragraph.

To change the type of content, click on the down arrow to reveal a dropdown menu. Choose what you would like to change your content to.

**Note:** The options available to you in the dropdown menu adhere to the print template, so you won’t be presented with any options that you’re not allowed to use.
Tip: If you want to hide the outline to give you more space to write, click on the arrows.

6.7. Content Enrichment

Content Enrichment includes Chapter Keywords, Content Tags, and Component Tags. Content Enrichment will make a chapter and/or its individual elements easier to discover on Elsevier platforms in the future.

6.7.1. Chapter Keywords

Chapter Keywords describe the most important topics in the chapter in a few words.
To add chapter keywords, click on the tag icon in either the toolbar or the *Right Action Bar*.

Click on a suggested tag to add it or start typing to reveal more suggestions.

### 6.7.2. Content Tags and Component Tags

*Content tags* describe the concept(s)/topics of an individual paragraph or asset.
Component tags are applied to a section, paragraph, or Figure and tell what the function of that content is. This provides a more complete, machine-readable description of your content, which in turn allows for more targeted search results.

To add content or component tags, place your cursor within a section heading or paragraph in the Chapter and click Add Tag in the toolbar.

Click on a suggested tag to add it or start typing to search for suggestions.
6.7.3. Discoverability Score

Tagging your chapter increases its ability to reach new audiences. High-quality tags make content more discoverable and more reusable across publishing formats. The Discoverability Score reflects the quantity, quality, and reach of the tags applied to the chapter. The score updates in real-time as you apply additional tags.

To access the Discoverability Score, open the Content Tag pane and hover over the Discoverability Score bar. A pop-up will display the breakdown of tags in the chapter.

6.8. Print Preview

Work in Progress: Check back to find out more about Print Preview.
7. Commenting

Elsa allows you to communicate with your Project Team with Chapter Notes and your chapter Co-Contributors with Chapter Comments.

7.1. Chapter Notes

Chapter Notes are visible to anyone with access to the Project from the Project Overview page by hovering over the comment bubble.
If you are editing a chapter, Chapter Notes can also be found by clicking the Comments and Notes icon on the Right Action Bar or from the toolbar.

### 7.1.1. Adding Chapter Notes

Chapter Notes can be added while you are editing the chapter. Click on the Comments and Notes icon on the Right Action Bar and the comments screen will open. Make sure you select the Chapter Notes tab.
To add a note, click on the *Add Note* icon, type your note, and click Add.

*Chapter Notes* can also be added when sending a chapter by clicking on the *Send* icon on the *Right Action Bar* and then typing in your note in the *Add Chapter Note* box.

## 7.2. Chapter Comments

Chapter comments can only be added and viewed by Users who have access to that chapter and if they are editing the chapter. To view a chapter comment, you must have a chapter in *Private*. Users who have read-only access to chapters will not be able to see the chapter comments.
8. Activity & Versions

Each time a chapter is shared or sent by a User, Elsa creates a new version of that chapter. The Activity & Versions tab is where Users can access chapter version history and view other general information about chapters like project type and language.

8.1. General Information

General information about a chapter can be found in the Activity & Versions tab, including:

1) **Projects**: The project or projects the chapters is currently in. Clicking on the project title will take you to that project’s overview page.

2) **Details**: This section provides details including document type, the language the document is written in, and completion dates.
8.2. Activity stream

Further down the page, underneath Details, is the Activity Stream. The Activity Stream shows each time the chapter was moved through the workflow and when it was moved.
8.3. Version History: Compare Selected

Each time a chapter is sent or shared by a User a new version is created. To compare versions, select two different versions and then click Compare Selected.

A side-by-side comparison will open in a new window showing details of the two versions being compared and which changes were made from one version to another.
9. Files

Supplemental project files can be uploaded to the Files Library. File types supported are PDF, Word DOC, Excel, JPG, and PNG.

It is important to remember that any files uploaded to the Files Library will not be accessible within the chapter and cannot be inserted into the chapter. The Files Library is intended to give the chapter Co-Contributors a place to share relevant documents and files.

9.1. Uploading Files

Under the Files tab, you can add supplementary files that can be accessed by anyone on your Chapter Team. File type is indicated by the icon. Clicking on that icon will allow any user on your Chapter Team to download that file. Size, uploaded by, and uploaded date are also shown. To upload a new file, click Upload.
10. References

*Work in Progress: Check back here for more information about References.*
11. Figures

You can add Figures—images and illustrations—to any chapter you have permission to edit. The Figures Library for each chapter contains all Figures anyone with access to edit the chapter has uploaded, and can be found under the Figures tab.

**Note:** Figures cannot be created, resized, cropped or otherwise edited in Elsa.

11.1. How to Add Figures to a Chapter

To add a Figure into the text while authoring a chapter, hover in between nodes to reveal the *plus sign*, click the *plus sign* to access the drop-down menu, then click on *Figure*. 
By default, you will be taken to *My Library*, which contains all Figures that have been uploaded to the chapter. Figures that are already placed in the chapter are marked with a green check.

To insert a Figure or Figures from *My Library*, select one or more Figures and click *Insert Selected*.

To upload a Figure to *My Library*, click *Upload*.

From the Upload screen, you will see the file requirements before uploading your Figure. Click *Browse*. 
The file name for the Figure or Figures you have chosen from your computer will appear here. To upload, click *Upload*. 
You will be taken back to My Library and the new Figure or Figures you uploaded will appear. The new Figure or Figures will be selected by default. To insert into a chapter, click Insert Selected.

Note: It’s important to remember that the placement of Figures is dictated by the print layout chosen for the project. In print, the Figure will not necessarily appear where you inserted it in the text, but will be placed in the best position to fit the print template.

11.2. Adding a Figure via the Figures Tab

You may not want to add a Figure or Figures directly to the text while writing, but instead may want to upload a Figure or Figures directly to the Library to use later.
Click on the *Figures Tab*. Figures already uploaded to the Library will appear here. Figures already inserted into the chapter will be indicated by *Inserted* at the top of the Figure.

To add a Figure or Figures, click *Add Figures*. 
11.3. Removing, Changing, and Editing Figures

To remove, change, or edit a Figure, click on the more options menu. A dropdown menu will appear.

- **Remove**: Removing a Figure extracts it from the chapter but does not delete it from the Library. It will remain in the Library for the chapter and can be inserted in the chapter again without having to upload it again.

- **Change Figure** replaces a Figure with one already in the Library or with a new Figure you upload. The original Figure will be moved to the Figures Library.

- **Edit** allows you to place annotations on the Figure. Current annotation options are text and lines.
11.4. Deleting and Downloading Figures

Unlike removing Figures, deleting Figures will permanently delete them from the Figures Library.

To delete a Figure, go to the Figures tab. Select any Figures you wish to delete then click on the selected menu. Click delete from the dropdown.

To download any images to your computer, use the same process as above, but select download.
11.5. Alternative Text

Alternative text—or alt text—helps make Elsa accessible to all Users. The alt text is used by screen readers which are browsers used by blind and visually impaired people to tell them what is on an image.

**Note:** For more information on how to write Alternative text, see W3C Web Accessibility Initiative’s web tutorials on alt text: https://www.w3.org/WAI/tutorials/images/

To add alt text, click on *Edit Alternative Text*.

An alt text window will open, allowing you to add alt text. Click *Confirm* when you are finished.
12. Tables

You can add Tables to any chapter you have permission to edit. Tables can be built in Elsa or uploaded from an Excel File.

12.1. Building a Table

While you are editing a chapter, click the Table icon either from the plus sign or the toolbar.

Click Create.
Add a title and choose the table type, then click create.

Choose Insert Selected.
Tables cannot be edited directly from the chapter write space. Choose *Edit* to go to the Tables editor.

Use the icons to add rows and columns. When you are finished, click *Done*. 
12.2. Uploading a Table From Excel

While you are editing a chapter, click the Table icon either from the plus sign or the toolbar.

Click Upload.
Before you select your file, check to make sure your Excel file meets all the requirements. Click "Browse" and select your Excel file from your computer.

After uploading your file, you’ll follow the same steps as you did to create a table to insert and edit the uploaded table.
13. Equations and Formulas

Elsa uses the Wiris MathType Equations Editor, which also supports LaTex. For more information or help using the Equation Editor, visit the MathType web documentation center: https://docs.wiris.com/en/mathtype/mathtype_web/start

You can launch the Equations Editor from two different places, depending on where you would like to insert your equation or formula.

13.1. Inline Equations and Formulas

To create an equation or formula that will be inserted inline with your text, place your curser where you would like the equation or formula and click on the formula icon in the top tool bar.

13.2. Numbered Equations and Formulas

To create a numbered equation, click on the plus sign and choose Formula from the dropdown.