# EEMUG 2020

#EEMUG2020

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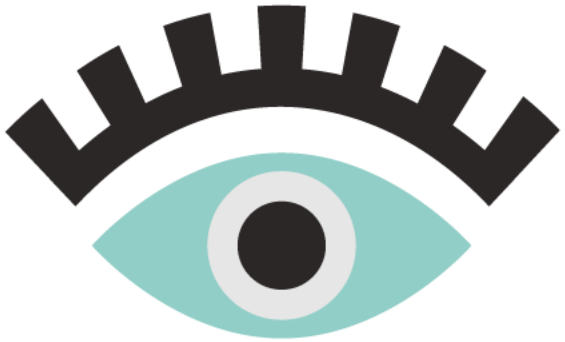

# Cross-Publication Functionality

## *Overview, and Brainstorming the Future*

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#EEMUG2020

# B.E.V.

*(Before Enterprise View)*

# Earlier Cross-Publication Features

- EM Portal/People Sharing Group
  - Allows synchronization of People Records
- Cross Publication Login List ('Go To' publications)
  - Allows shared login across publications
- Publish/Subscribe to Letter Templates
  - Allows master configuration of letters
- Cross-Publication Reporting
  - Allows shared reporting using XEAR
  - Based on a shared UDB (Unified Database)
- Cross-Publication Duplicate Submission Check
  - Uses UDB
- Cross-Publication Reviewer Statistics
  - Uses UDB

# EV

*(Enterprise View)*

# PM Enterprise View (“EV”)

- PM users have long asked for a way to manage production responsibilities across multiple publications without having to login and logout, or jump from the main menu on one PM site to the next.
- **SOLUTION: New PM Enterprise View allows users to access submissions across multiple publications within a single interface from a new menu tab available on any of the PM sites.**

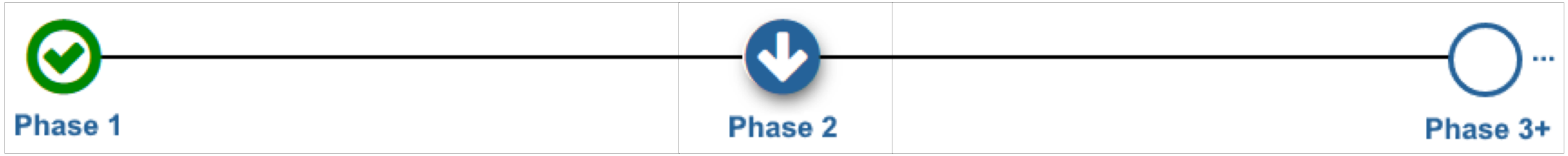
# EV Development Priorities

1. Prioritize Functionality that is multi-journal by nature
    1. Hence Production before Editorial
2. Active items only
    1. No '… with Production Completed'
3. Identify work a user needs to do across publications
    1. Tasks Assigned to Me
    2. Search functionality (for 'Custom Folder' effects of Saved Searches)
    3. To-Do folders
    4. Work I need to oversee/Tasks I have assigned/PSG
4. Then look at general overviews
    1. E.g. 'All submissions in…' folders

# “Under the Bonnet”

- Publication must be a PM customer
- Publication must have a UDB (Unified Database)
- User has Editor or Publisher RoleManager permission to access EV
- User has Cross-Publication Login permissions and has configured a Cross-Publication Login List
- User has appropriate production-related permissions on publications in the group

# Phased Implementation



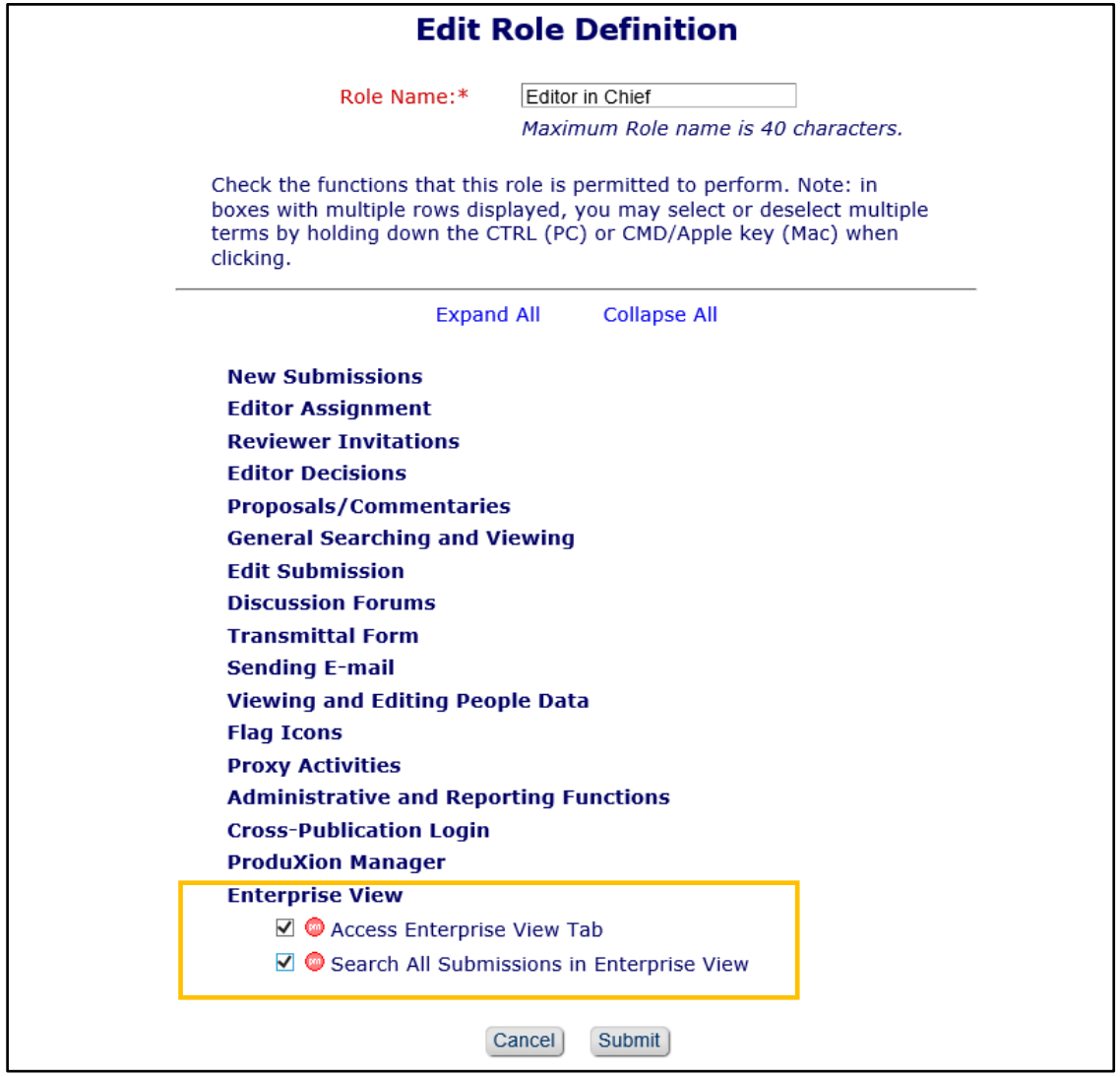

- Version 16.1 built the infrastructure
- Added priority pages:
  - Submission Tasks Assigned to Me  folder
  - Schedule Group Tasks Assigned to Me folder
  - Search Submissions

- Version 17.0 (in development) adds 5 additional folders to EV
  - ‘At-Risk’ Submissions
  - Production Initiated – No Tasks Assigned
  - Submission Tasks I Have Assigned
  - View All Production Tasks With Authors
  - View All Submissions in Production

# EV Phase 1

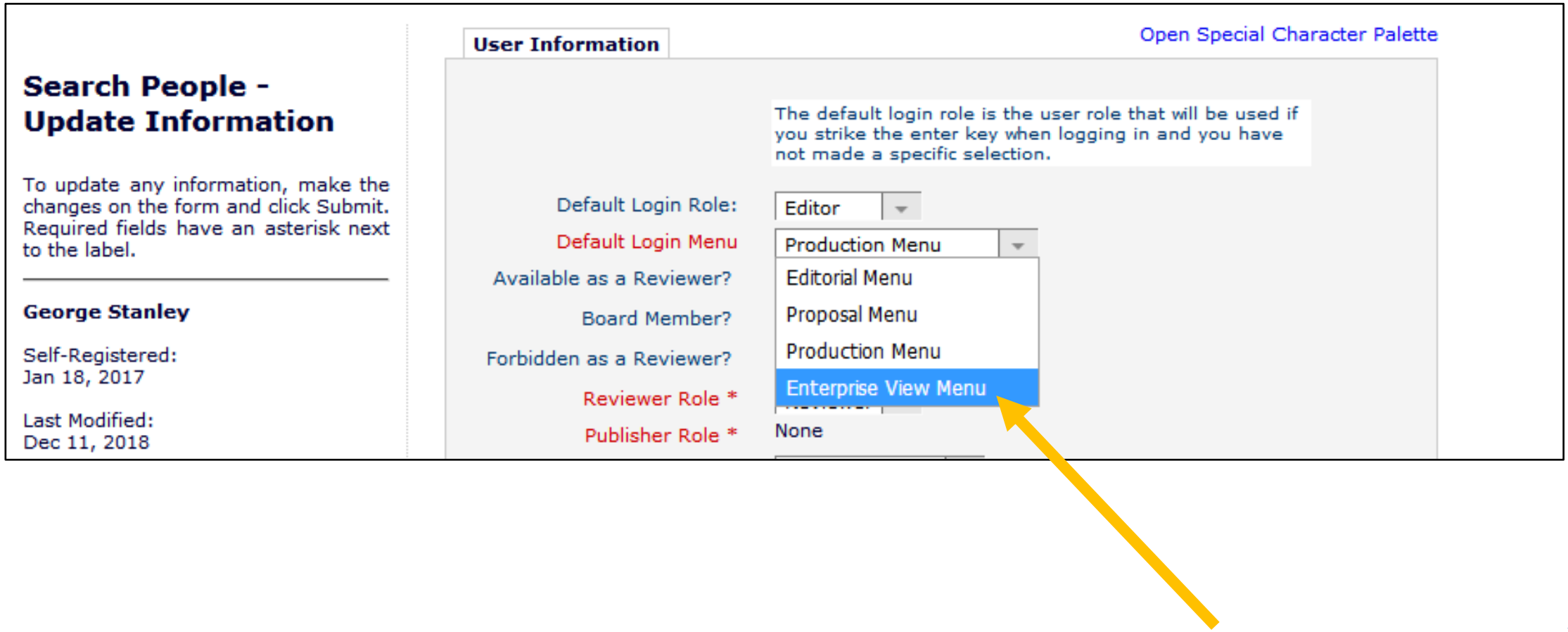
*Completed*

# New Editor and Publisher Permissions



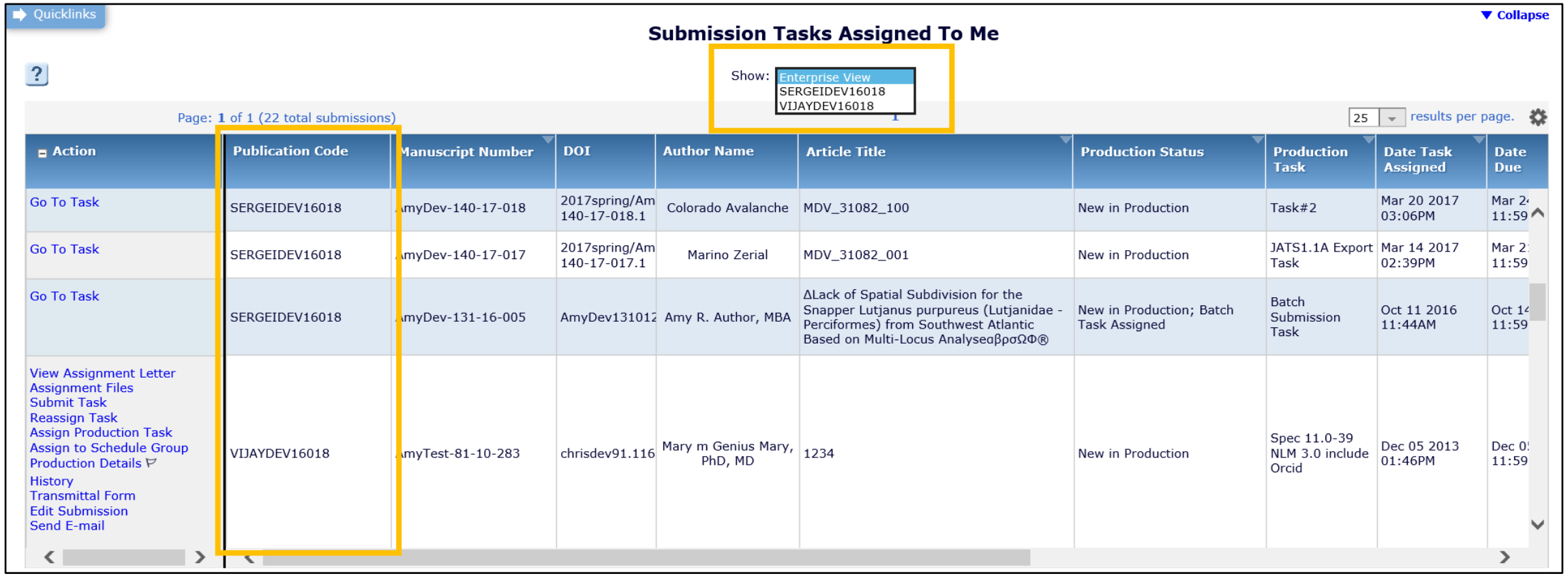
# New Enterprise View Menu

# Make EV Menu a user's Default Login Menu



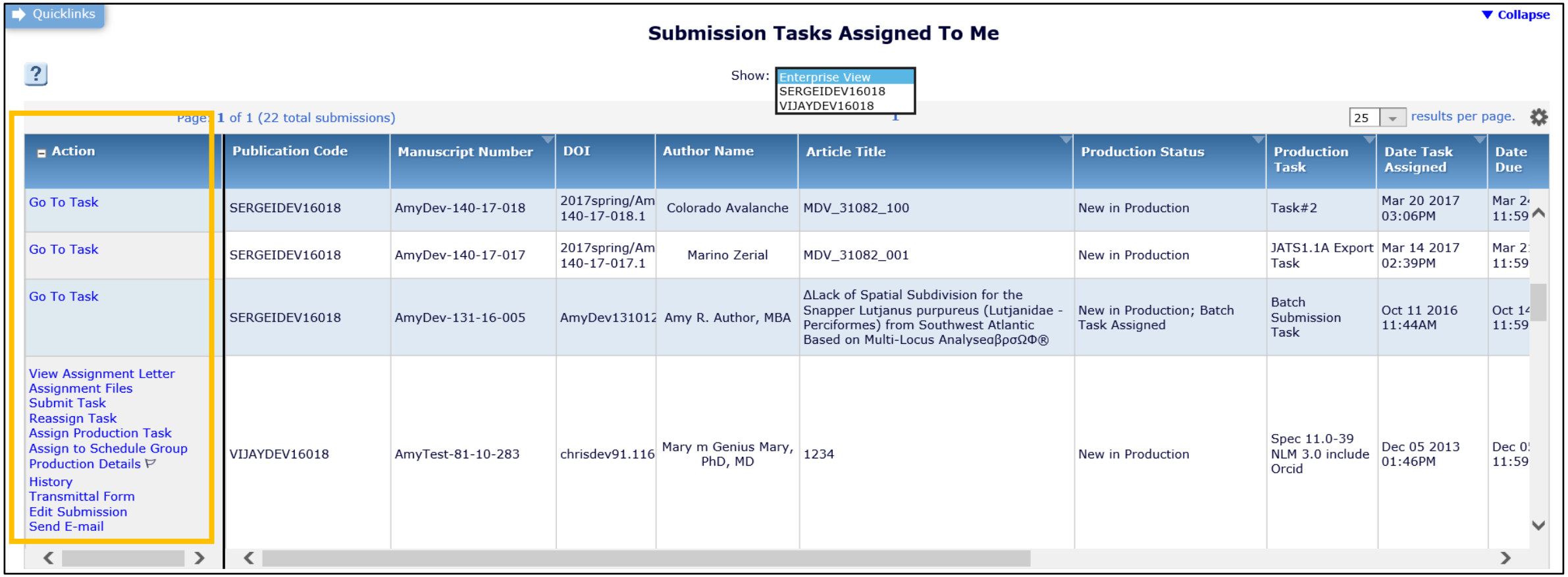
# EV Folders

- EV folders take the existing PM folders and enhance them with:
  - PowerGrid format (just like existing Search Results & Production Status Grid)
  - Publication Code filter to refine the result set by publication
  - New Publication Code column to easily identify which site the task belongs to



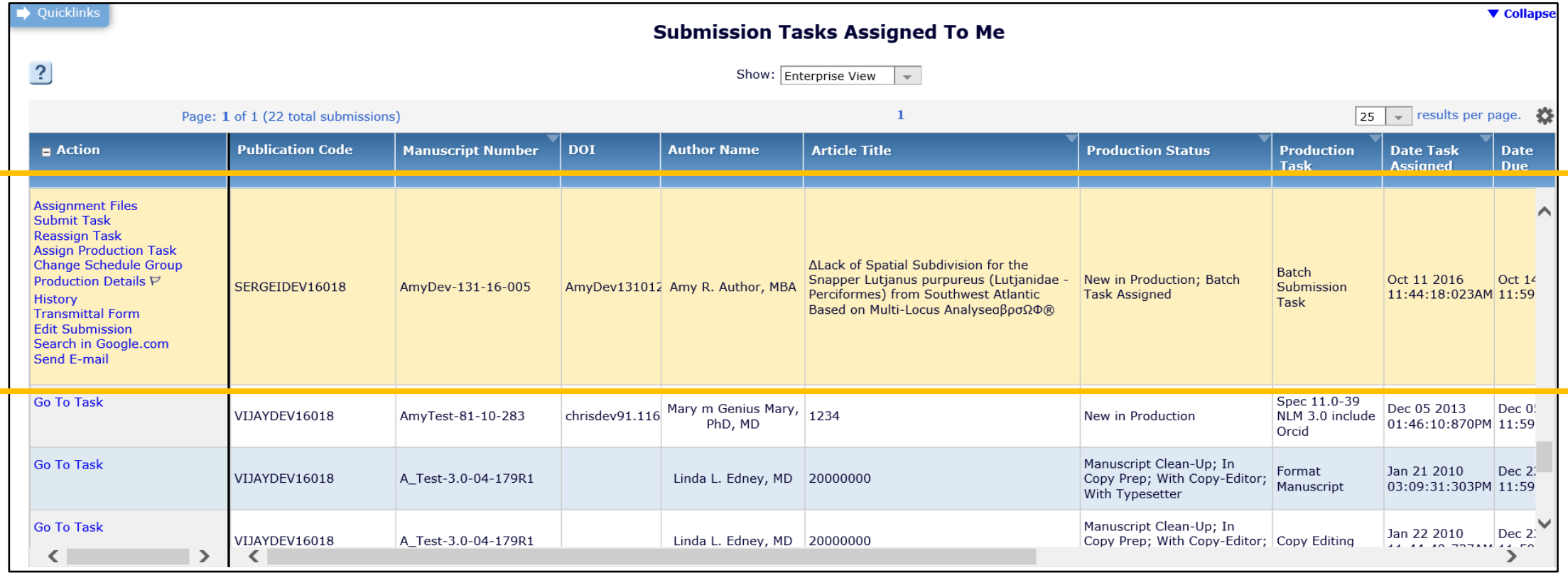
# Taking Action from EV Folders

- Full set of Action links for the records on the current site
- A ‘Go To Task’ link to carry out actions on other publications



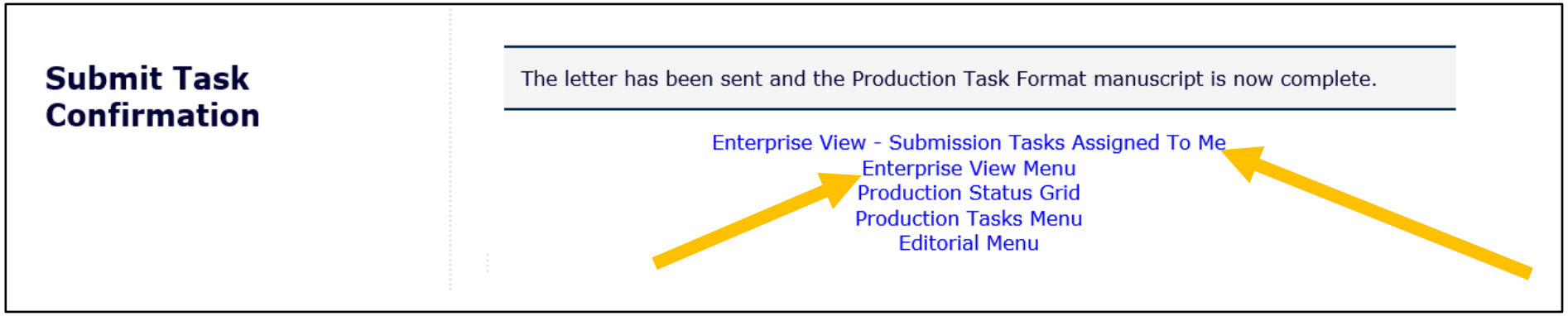
# Taking Action from EV Folders (continued)

- Clicking ‘Go To Task’ on Site A takes you to the anchored location for that record on Site B, where you can carry out the Action.
- User is now in Enterprise View mode on Site B.
- User can continue working on Site B, or click ‘Go To Task’ to carry out Action on another site.



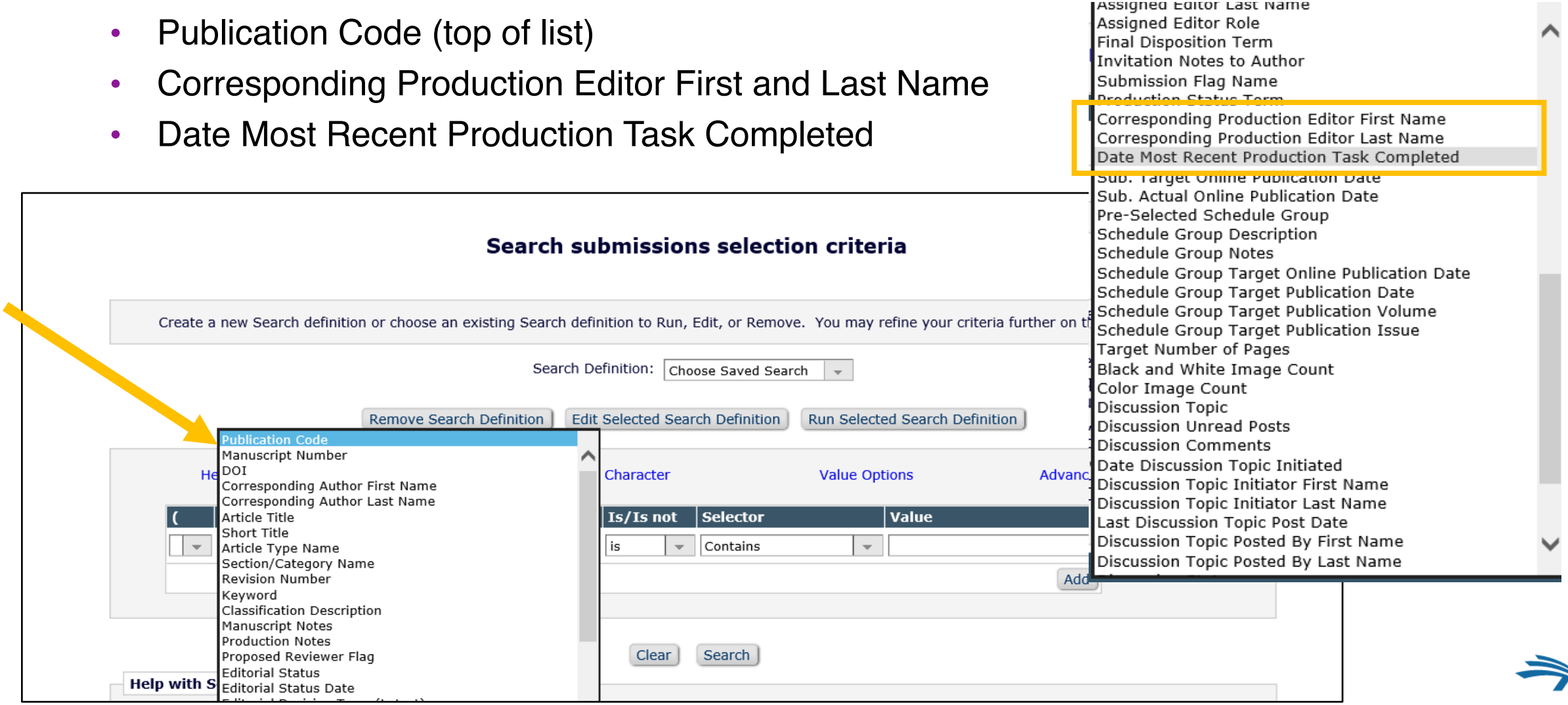
# EV Confirmation Pages

- Enhanced navigation on confirmation pages, allowing the user to return to EV, or work within the new publication

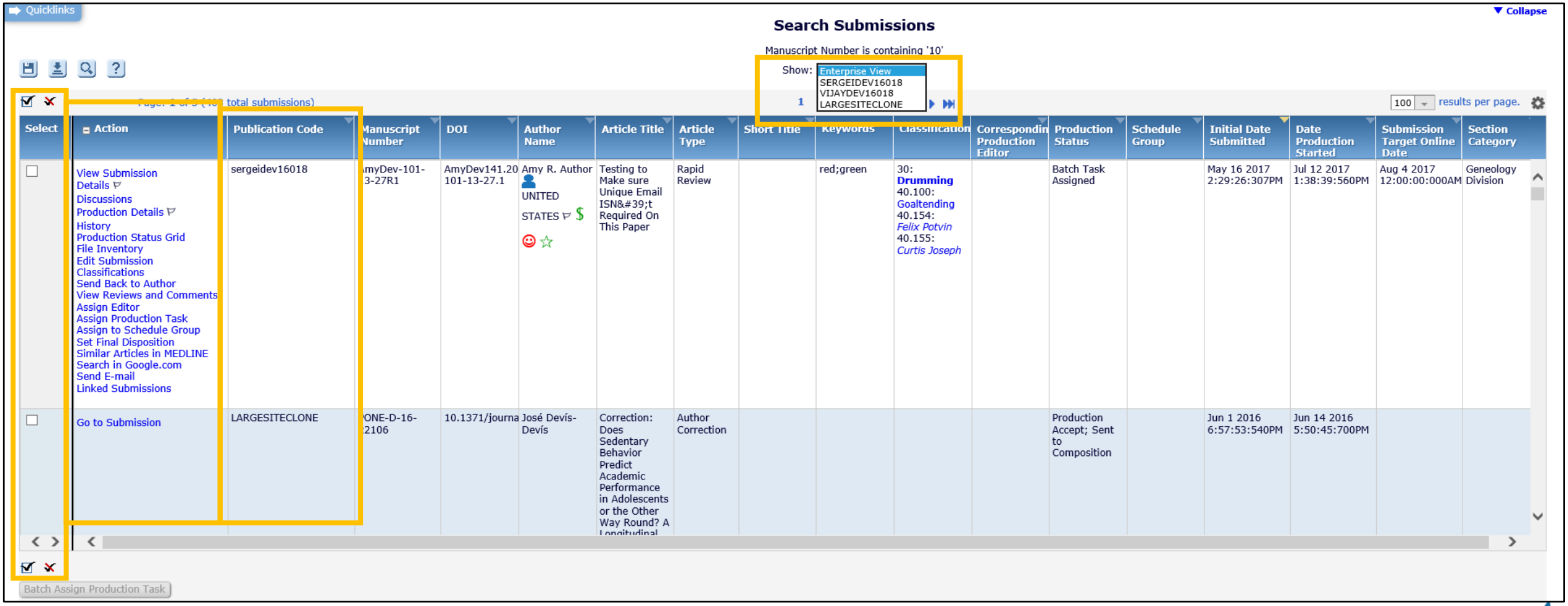


# EV Search Selection Criteria

- Four new search criteria:
  - Publication Code (top of list)
  - Corresponding Production Editor First and Last Name
  - Date Most Recent Production Task Completed

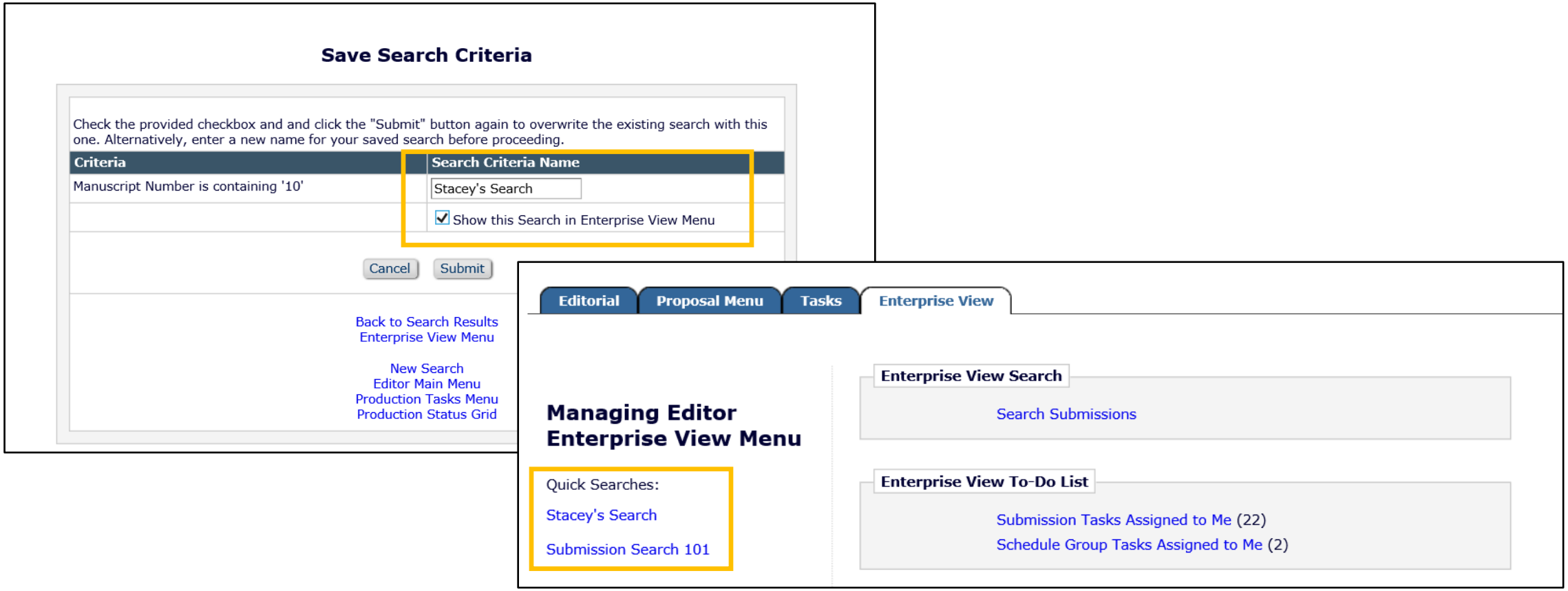


# EV Search Results



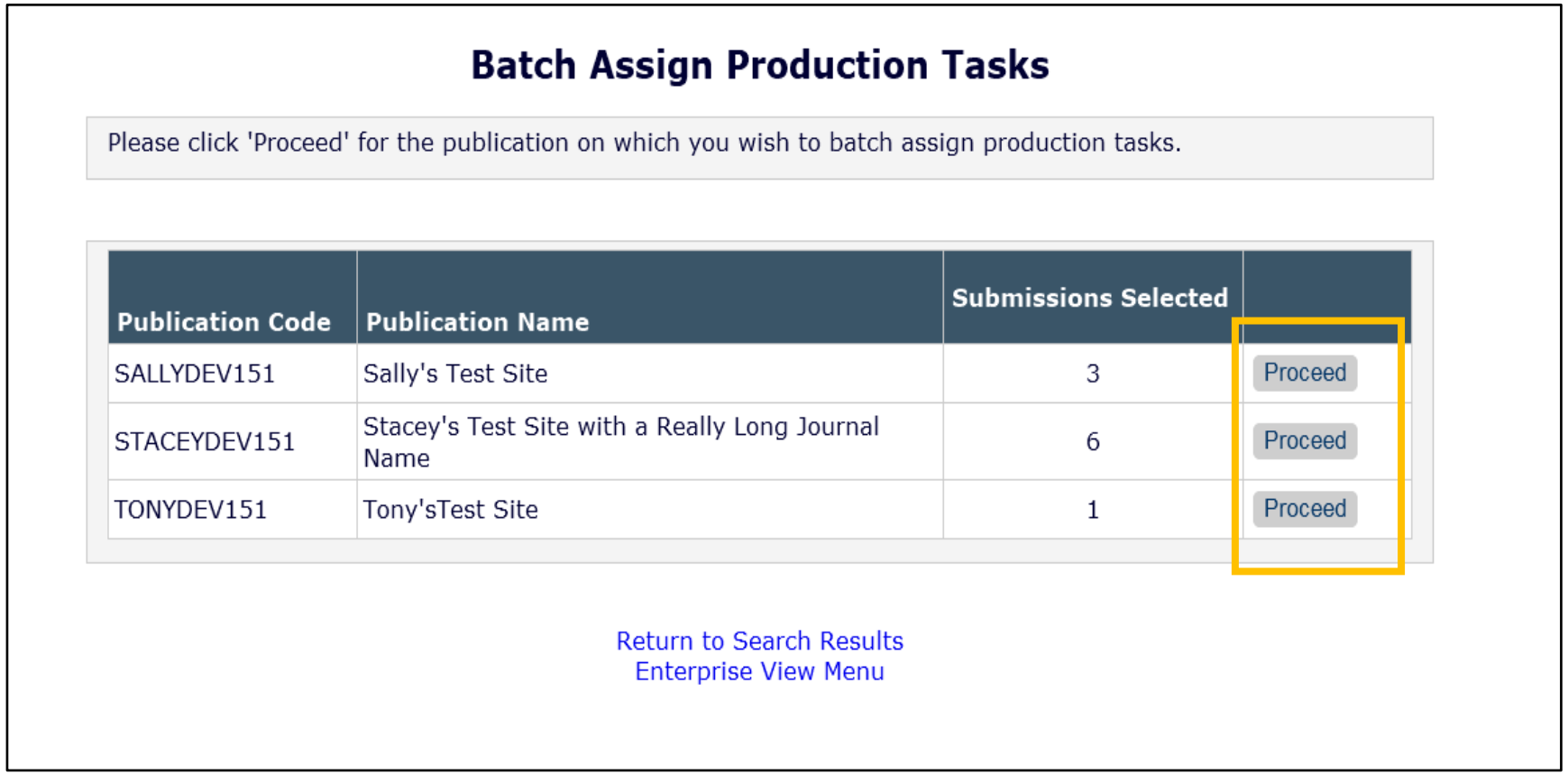
# EV Save Search

- User can Save  the search and display it on the EV Menu
  - Note: Saved EV searches cannot be shared with other users



# Cross-Publication Batch Task Assignment

- EV supports batch task assignment from EV Search Results
- Users can batch assign tasks in a single workflow cross-publication

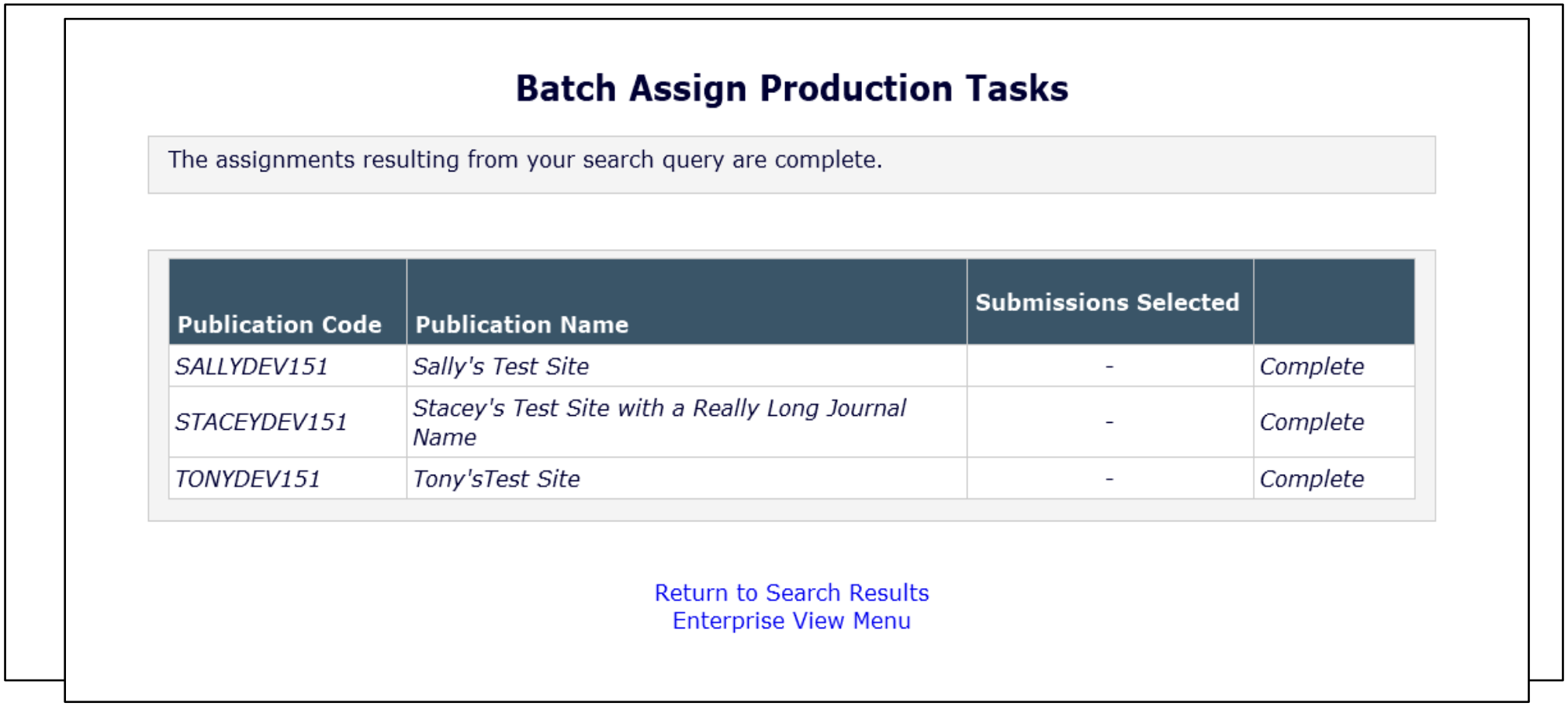


# Cross-Pub Batch Task Assignment

- User steps through the selection of task and assignee, letter customization, upload of files
- On the confirmation page, there are navigation links to keep the user in “EV mode” and proceed with batch assignment on the next publication

# Cross-Pub Batch Task Assignment

- Clear indication of what is complete and what is left to do



## Batch Assign Production Tasks

The assignments resulting from your search query are complete.

| Publication Code | Publication Name | Submissions Selected | |
|---|---|---|---|
| *SALLYDEV151* | *Sally's Test Site* | - | *Complete* |
| *STACEYDEV151* | *Stacey's Test Site with a Really Long Journal Name* | - | *Complete* |
| *TONYDEV151* | *Tony'sTest Site* | - | *Complete* |

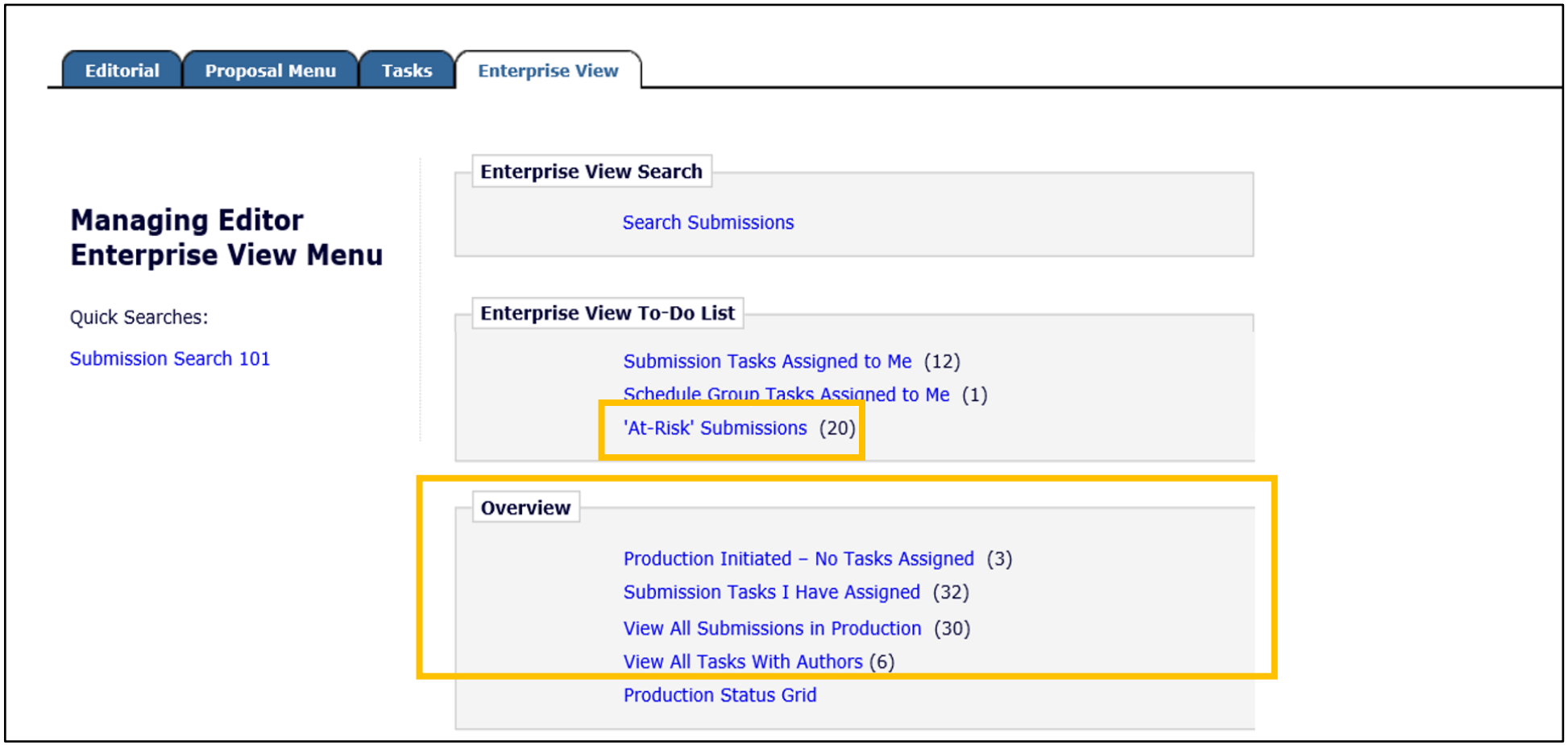
Return to Search Results
Enterprise View Menu

# EV Phase 2

*Currently in development*

# Phase 2 – Version 17.0

- Currently in development, this extends the functionality to five new folders from To-Do and Overview sections.



# EV Phase 3

*Currently scheduling*

# Phase 3 – Remaining PM Functionality

**Submissions**

- Production Status Grid
  - Tricky. How to harmonize workflows across publications?
- View All Submissions in TaskManager
- Active Linked Submissions

**Schedule Groups**

- SG Tasks I have Assigned
- Manage Schedule Groups

**Searching**

- Sharing EV Searches
- People?

# EV Phase 3++

*Bringing EV to EM…*

## Submissions With:

| 0 Reviews Complete | 1 Reviews Complete | 2 Reviews Complete | 3 Reviews Complete | 4 Reviews Complete |
|---|---|---|---|---|
| 1 | 0 | 0 | 0 | 0 |

## Search

Search Submissions | Search People

## Editor 'To-Do' List

My Pending Assignments (64)

- New Submissions (23)
- Revised Submissions (5)
- New Submissions Requiring Assignment (3)
- Revised Submissions Requiring Assignment (0)
- Submissions Needing Approval by Editor (1)
- Submissions Sent Back to Author for Approval (12)
- Incomplete Submissions (14)
- Submissions with Rescinded Decision (5)
- Submissions with Required Reviews Complete (35)
- Submissions Requiring Additional Reviewers (8)
- Submissions with One or More Late Reviews (6)
- Submissions with Active Discussions (2)

Reviews in Progress (7)

- Reviewers Invited - No Response (2)
- Submissions Under Review (6)

## View All Assigned

View All Assigned Submissions (90)
View All Assigned Submissions being Edited (26)

## Subordinate Editor's Pending Assignments (79)

Group by Editors I Assigned
Group by Editor with Current Responsibility
Group by Manuscript Status

## Submissions with Decisions

Submissions out for Revision (37)
All Submissions with Editor's Decision (7)
All Submissions with Final Disposition:
Accept (70), Reject (2), Withdrawn (18), Transfer (6)
Completed Conference Submissions (3)
Withdrawn Conference Submissions (0)
My Assignments with Final Disposition (2)

## Linked Submission Groups

Active Linked Submission Groups (5)
Inactive Linked Submission Groups (0)

# Roles?

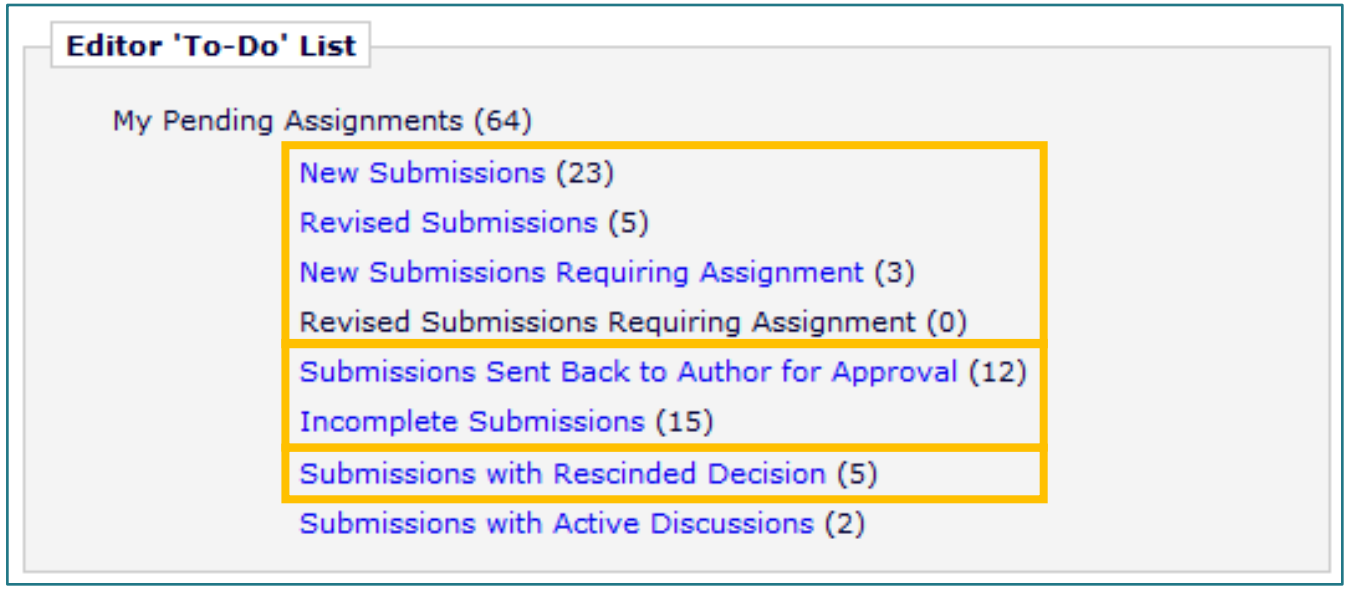
- EV currently relies on Go To Publication list
  - Only Editor/Publisher Roles
- Role Priorities?
  1. Editor
  2. Publisher
  3. Reviewer?
  4. Author?
- We expect to work on Editor Role features next

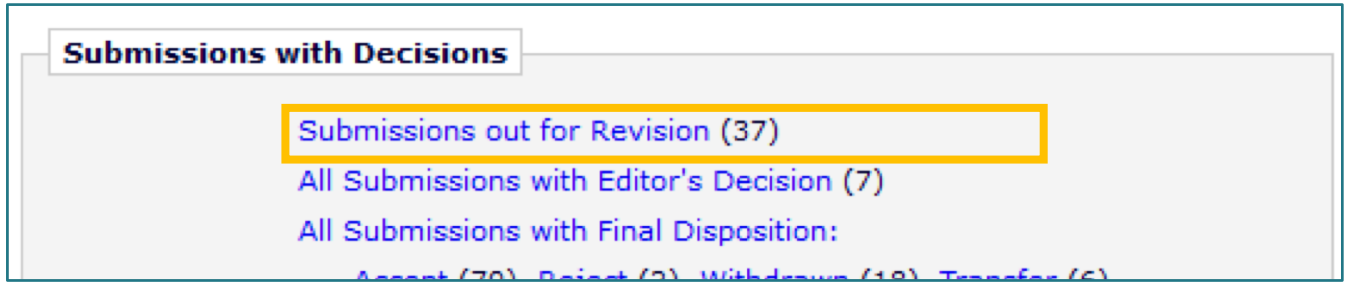
# Handoff Folders: Where Production is Initiated

- All Submissions with Editor's Decision
- All Submissions with Final Disposition
  - Accept
- Accepted Submissions (Publisher Role)

# Journal Office functions

- New/Revised Submissions/ Requiring Assignment (x4)
- Direct-to-Editor New Subs.
- Sent Back to Author
- With Rescinded Decision
- Incomplete/Needing Approval
- Out for Revision?



# In-Chain Editor Pending Assignments

- New Invitations/Assignments
- With Required Reviews Complete
- Requiring Additional Reviewers
- With Late Reviews
- With Active Discussions

# Overview Folders (by Section)

- Remaining ‘To-Do’ folders:
  - Reviewers Invited no Response
  - Submissions Under Review
- View All Assigned
- Subordinate Editor's Pending Assignments
- Submissions with Decisions
  - Maybe omit some as completed
  - Cf. Handoff folders
- Linked Submission Groups

# Over to You

*What do you want to see next?*

# What to prioritise, Cross-Publication?

- Sharing EV Searches
- Roles other than Editor?
- Folders where Production is initiated
- Journal Office Features (receiving Submissions, Notifying Authors)
- To-Do Folders for Editors in Decision Chain (Reviewers & Decisions)
- Journal Overview/Submissions by Editor Folders
- Search People Cross-Publication
- Your suggestions for new features?

## Submissions With:

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## Search

Search Submissions | Search People

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