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EMUG 2023



Courtyard Boston Downtown Hotel
June 14-15, 2023

Aries
systems.



EMUG 2023

Issue- and Article-Based Production Workflows

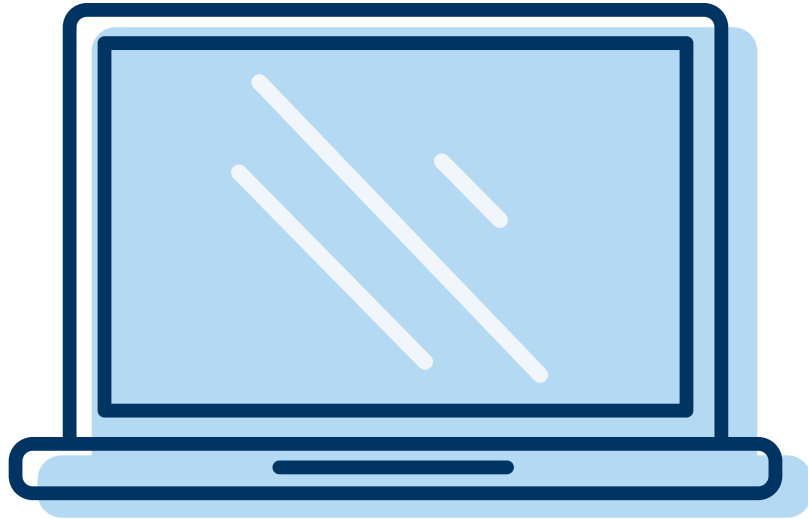
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Account Coordinator
CDonovan@ariessys.com

Agenda

Welcome to EMUG: Day 1

- Introduction to ProduXion Manager
- Getting Started in ProduXion Manager
- Initiating Production: 4 Ways to Get a Submission into PM
- Assigning a Production Task
- Custom Production Workflows
- The Production Status Grid
- Schedule Groups and Schedule Group Production Tasks
- Basic ProduXion Manager Reporting
- Resources
- Questions from Attendees





Introduction to PM

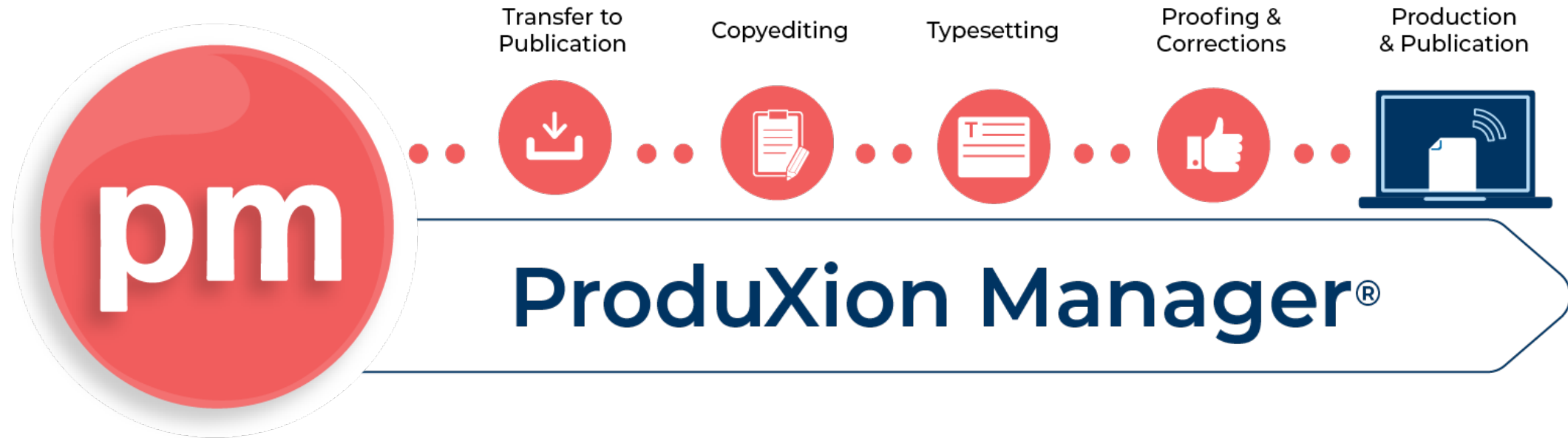
What is it?

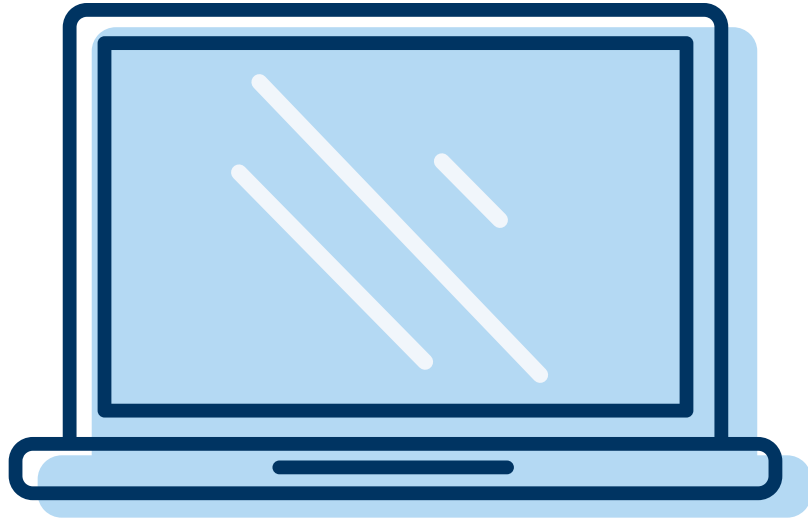
What is ProduXion Manager (PM)?

- An innovative, highly-configurable cloud-based production workflow management solution
- Streamline production processes, communications, and management of files
- Works seamlessly with Editorial Manager to create a true end-to-end publishing experience
- Offers a set of features that allow publications to manage tasks outside of the editorial workflow
- Production tasks are used to track and manage assignments to production staff and external vendors and freelancers



Streamlined Production Experience







Getting Started with PM

Roles & Configurations

Main Page Overview

  **ProduXion Manager Demo Site** Login | Register

Home Submit a Manuscript About ▾ Help ▾

Welcome to ProduXion Manager® for Christine's Journal




[Insert Special Character](#)

Please Enter the Following

Username:

Password:

Author Login Reviewer Login Editor Login Publisher Login

Or Login via:  [What is ORCID?](#)

Send Login Details Register Now Login Help  Manuscript Services

If this is the first time you have submitted to Christine's Journal, please create an author account first by clicking **Register Now** and entering the requested information. Upon successful registration, you will be sent an email with instructions to verify your registration.

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Role Families



Authors

Easily create Author proofs
Perform status updates



Editors

Assign and track tasks
Communicate with external vendors
Review and approve proofs



External Vendors

Receive and complete
assigned production tasks

Editor Roles



Editors

Assign and track tasks
Communicate with external vendors
Review and approve proofs

- Can be granted as much access to the production environment as the publication needs
- Typically used for internal staff, such as Production Editors
- Can be granted System Administration access

Publisher Roles



External Vendors

Receive and complete assigned production tasks

- Fewer permissions available
- Less access to the editorial functionality if the journal is also using EM
- Typically used for external freelancers and vendors

Author Roles



Authors

Easily create Author proofs
Perform status updates

- All users are given an Author role by default
- Authors can be assigned production tasks and check on the status of their submissions in production

Configurations: PolicyManager

When PM is enabled for those with EM sites, an expanded set of configurations will display in PolicyManager



- ☰ **ProduXion Manager**
 - Configure Automatic Production Initiation
 - Configure Automatic Copy of Target to Actual Publication Information
 - Configure Book Processing
 - Configure NIHMS Embargo Period Rules
 - Configure Submission Workflows and Production Tasks
 - Configure Schedule Group Production Tasks
 - Configure Task Manager Policies
 - Set Production Task Deep Link Expirations
 - Configure Identifiers Displayed in Production Tracking
 - Configure Production Statuses
 - Define National Holidays
 - Configure Attachment Security
 - Edit Instructions for Attachments
 - Set Attachments Deep Link Policy

Configurations: RoleManager

New RoleManager configurations for the Editor, Publisher, and Author roles will also become available

Editor Login

Publisher Login

Author Login

ProduXion Manager

- Create Submission
- Initiate Production Manually
- Allow Task Assignment and Assignment to Schedule Group when Initiating Production
- Serve as Corresponding Production Editor
- Change Corresponding Production Editor
- View Schedule Groups
- Manage Schedule Groups
 - Assign Submissions to Multiple Schedule Groups
 - Copy Contents when Copying a Group
 - Automatically Cancel Production Task Assignments when Closing Schedule Groups
- Edit Submission Target Online Publication Date
- Set/Release XML Lock
- View Production Details
 - Use Production Details Layout ▾
- View Production Status Grid



Production Tasks Menu

Editorial **Proposal Menu** **Production Tasks**

**Managing Editor
Production Tasks Menu**

Search

[Search Submissions](#) | [Search People](#)

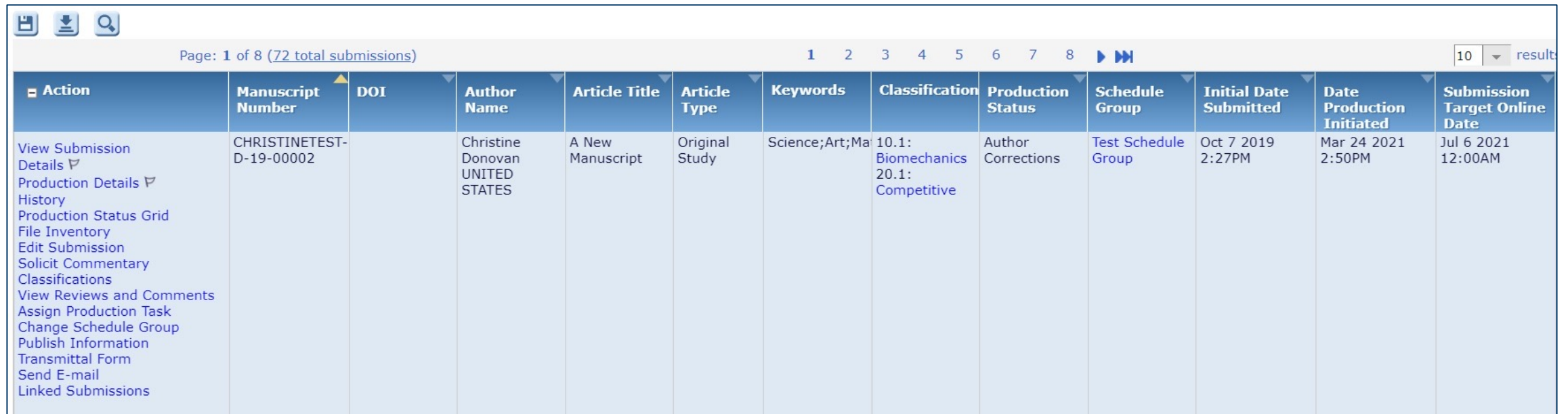
To-Do List

- [Submission Tasks Assigned to Me \(7\)](#)
- [Schedule Group Tasks Assigned to Me \(0\)](#)
- ['At-Risk' Submissions \(0\)](#)



Searching for Submissions in ProduXion Manager

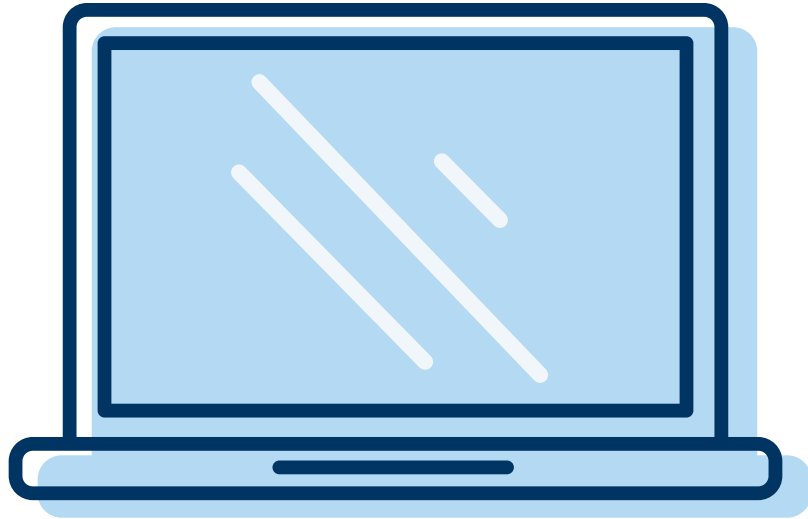
Run submission searches from the Production Tasks menu to see production-specific links and information in the results:



Page: 1 of 8 (72 total submissions)

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Keywords	Classification	Production Status	Schedule Group	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
View Submission Details Production Details History Production Status Grid File Inventory Edit Submission Solicit Commentary Classifications View Reviews and Comments Assign Production Task Change Schedule Group Publish Information Transmittal Form Send E-mail Linked Submissions	CHRISTINETEST-D-19-00002		Christine Donovan UNITED STATES	A New Manuscript	Original Study	Science;Art;Ma	10.1: Biomechanics 20.1: Competitive	Author Corrections	Test Schedule Group	Oct 7 2019 2:27PM	Mar 24 2021 2:50PM	Jul 6 2021 12:00AM

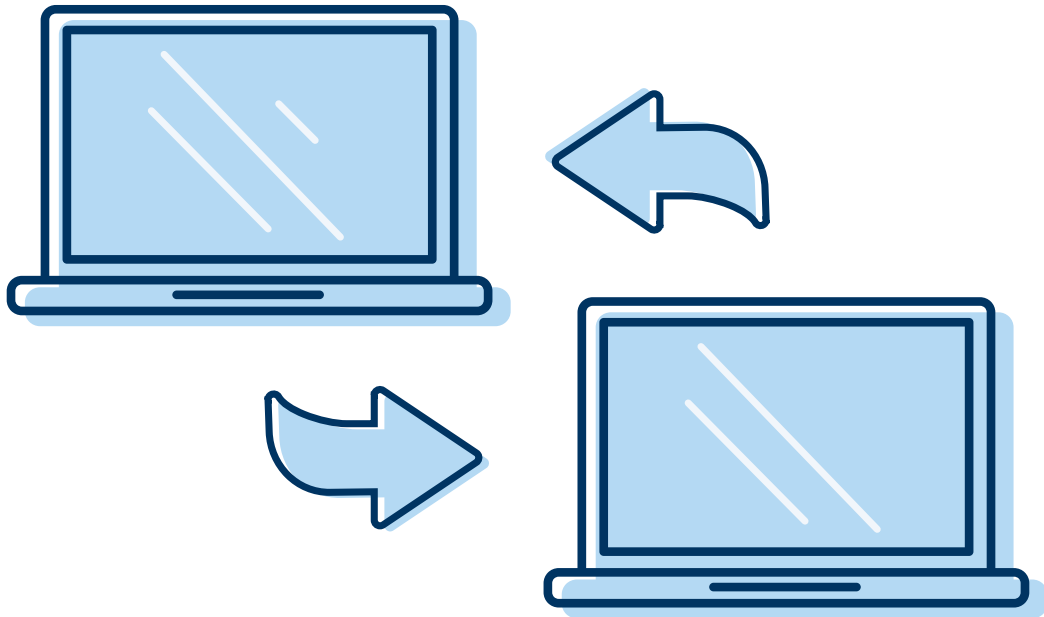




Initiating Production

Submissions from editorial to production

Moving a Submission into PM



1. Initiate production after setting Final Disposition – Accept in EM
2. Initiate production for New Submissions
3. Create Submission interface
4. Import manuscripts directly into PM via FTP

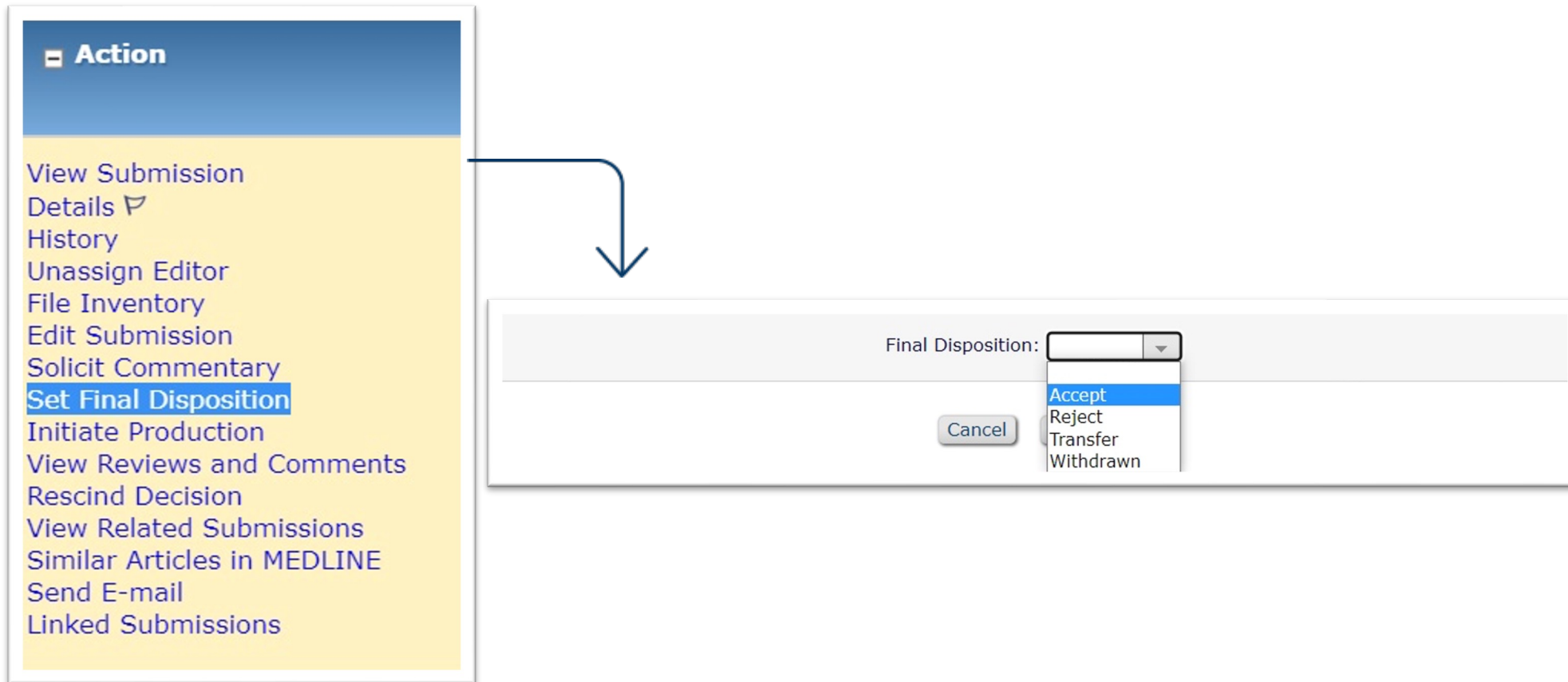
Initiating Production from Editorial Manager

- Achieve a true end-to-end publishing experience by pairing ProduXion Manager with Editorial Manager
- Initiate production from Editorial Manager at any point in the workflow



1. Final Disposition in EM – Accept

From the 'All Submissions with Editor's Decision' folder in EM, click 'Set Final Disposition'



The image shows a screenshot of the EM interface. On the left, there is a yellow 'Action' menu with the following options: View Submission Details, History, Unassign Editor, File Inventory, Edit Submission, Solicit Commentary, **Set Final Disposition**, Initiate Production, View Reviews and Comments, Rescind Decision, View Related Submissions, Similar Articles in MEDLINE, Send E-mail, and Linked Submissions. A blue arrow points from the 'Set Final Disposition' option to a dialog box on the right. The dialog box has a 'Final Disposition:' label and a dropdown menu with the following options: Accept, Reject, Transfer, and Withdrawn. A 'Cancel' button is also visible in the dialog box.

Final Disposition – Accept

Select the source files that should be transmitted to production

Source Files					
Item Type	Item Description	File Name	Last Modified	Actions	Include Item in Publisher Zip File
PDF	PDF			View	<input checked="" type="checkbox"/>
Manuscript		Script Practice Manuscript.docx	Oct 14, 2019	Download Item Item Metadata	<input checked="" type="checkbox"/>
Visual Abstract (PPT file)	Visual Abstract (PPT file)	Visual Abstract Test.pptx	Apr 28, 2020	Download Item	<input checked="" type="checkbox"/>
Figure	Figure	testfigure.jpg	Jun 07, 2023	Download Item Item Metadata	<input checked="" type="checkbox"/>
Supplemental Material	Supplemental Material	Sample Abstract.doc	Nov 27, 2019	Download Item	<input checked="" type="checkbox"/>



Final Disposition – Accept

Enter submission metadata that should be transmitted to production

Submission Metadata		
<input checked="" type="checkbox"/> Include metadata in release to production		
Item Description	Value	
Manuscript Number	DEMOCD-D-23-00011	Help
Revision Number	0	Help
Article Title	Editor Training Manuscript	Help
Article Type	Rapid Communication	Help
Initial Date Submitted	Jan 25, 2023	Help
Date Revision Submitted		Help
Keyword	Training; Science; Practice	Help
Classification Description	First Major Term; Minor Term under First; Second Minor Term under Fifth;	Help
Section/Category Name		Help
All Authors	Abigail Author	Help
First Author First Name	Abigail	Help
First Author Middle Name		Help
First Author Last Name	Author	Help
First Author Degree		Help
Number of Color Figures	<input type="text"/>	Help
Number of Line Drawings	<input type="text"/>	Help
Number of Half Tone Figures	<input type="text"/>	Help
Number of Tables	<input type="text"/>	Help



Final Disposition - Accept

Notify Users of Final Disposition - Accept

The following user roles are configured to receive a letter for the Final Disposition - Accept event. To customize a particular letter, click the Letter Name link. Once you have customized a letter, an asterisk is displayed next to the person's name.

If you do not explicitly customize the letter for a particular person, the default letter is sent.

Name	Letter
Mary Editor (Publisher)	Publisher Notification of Accepted Manuscript
Paul Publisher (Publisher)	Publisher Notification of Accepted Manuscript
Penelope Publisher (Publisher)	Publisher Notification of Accepted Manuscript

[Back](#)

[Cancel Final Disposition](#)

[Send All Letters](#)



Automatic Production Initiation

Configure production to initiate automatically after the final disposition is set to "Accept" in PolicyManager > Configure Automatic Production Initiation

Configure Automatic Production Initiation

Set/Check the 'Initiate Production upon Setting Final Disposition' box to have EM automatically initiate production when the final disposition on a submission is set to 'Accept'.

You may also give Editor and Publisher Roles the 'Initiate Production' permission to allow them to do this manually at any stage before this point. Users with this permission will also be given additional options for assigning the submission to a Schedule Group and/or assigning an initial production task when production is initiated automatically as a result of setting the final disposition.

For Conference Submissions, note that only the 'Accept and Transmit' Final Disposition will automatically initiate production; 'Accept for Extraction' only sets the final disposition.

Regular Submissions:	<input checked="" type="checkbox"/> Initiate Production upon Setting Final Disposition to 'Accept'
	<input type="checkbox"/> Initiate Production upon Setting Final Disposition to 'Accept on Submission'
Conference Submissions:	<input type="checkbox"/> Initiate Production upon Setting Final Disposition to 'Accept and Transmit'

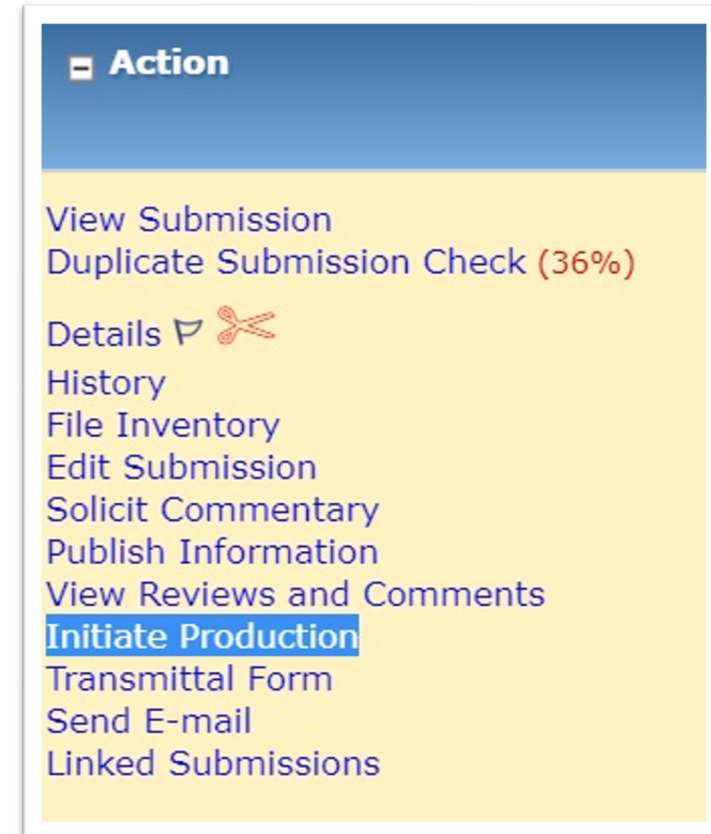


Manual Production Initiation

Production can also be initiated manually from the 'All Submissions with Final Disposition Accept' folder



Initiate Production action link



2. New Submission – Initiate Production

Editor 'To-Do' List

My Pending Assignments (25)


- New Submissions (3)**
- New Submissions Requiring Assignment (4)
- Revised Submissions Requiring Assignment (9)
- Submissions Sent Back to Author for Approval (8)
- Submissions with Rescinded Decision (1)
- Submissions with Required Reviews Complete (0)
- Submissions Requiring Additional Reviewers (0)
- Submissions with One or More Late Reviews (0)



Action	Manuscript Number	Article Type
<ul style="list-style-type: none">View Submission Details ▾Initiate DiscussionHistorySubmit Early DecisionTechnical CheckFile InventoryEdit SubmissionSend Back to AuthorRemove SubmissionClassificationsSet Final DispositionAssign Editorial TaskInitiate ProductionSimilar Articles in MEDLINESend E-mailLinked Submissions	DEMOCD-D-22-00011	Editorial



Initiate Production

Assign Submission to Schedule Group:	Do not assign to Schedule Group ▾
Submission Target Online Publication Date:	<input type="text"/>  (mm/dd/yyyy)

Select the production task you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear.

Schedule Group:	March 2022 Edition
Production Task:	Copyediting ▾



Enter Submissions Directly into PM



- PM seamlessly connects with upstream editorial and production systems
- Use the Create Submission Interface or a Manuscript Import Profile to move submissions directly into PM to start the production workflow

3. Create Submission Interface

RoleManager



ProduXion Manager

- Create Submission**
- Initiate Production Manually**
- Allow Task Assignment and Assignment to Schedule Group when Initiating Production**
- Serve as Corresponding Production Editor**
- Change Corresponding Production Editor**
- View Schedule Groups**
- Manage Schedule Groups**
 - Assign Submissions to Multiple Schedule Groups**
 - Copy Contents when Copying a Group**
 - Automatically Cancel Production Task Assignments when Closing Schedule Groups**
- Edit Submission Target Online Publication Date**
- Set/Release XML Lock**
- View Production Details**
 - Use Production Details Layout**
- View Production Status Grid**



Create Submission Interface

The screenshot shows a navigation menu with three items: 'Editorial', 'Proposal Menu', and 'Production Tasks'. The 'Production Tasks' item is circled in blue. Below the menu is a search bar with a 'Search' button and two options: 'Search Submissions' and 'Search People'. The 'Search People' option is circled in blue.

Enter the submission manually into ProduXion Manager with the Create Submission functionality



Merge People	Name ▼	City ▲	State
<input type="checkbox"/>	Katie Author	Toronto	
<input type="checkbox"/>	Amelia Author	North Andover	
<input type="checkbox"/>	Allan Author		



Create Submission Interface

- The Create Submission button is found in the people records for registered users
- The Create Submission button should be accessed from the Author's people record

The screenshot displays a user interface for creating a submission. On the left, a button labeled "Create Submission" is circled in blue. Below it, there is a checkbox "Exclude this user from receiving all batch and reminder emails:" with two radio button options: "Always" (selected) and "When Unavailable Dates are active".

The main form is titled "Personal Information" and contains the following fields:

Title	Dr.
Given/First Name *	Amelia
Middle Name	
Family/Last Name *	Author
Degree	(Ph.D., M.D., etc.)
Preferred Name	(nickname)
Primary Phone	(including country code)
Secondary Phone	(including country code)
Secondary Phone For	Mobile <input checked="" type="radio"/> Beeper <input type="radio"/> Home <input type="radio"/> Work <input type="radio"/> Admin. Asst. <input type="radio"/>

Create Submission Interface

Create Submission

- Enter Metadata
- Add/Edit/Remove Authors
- Attach Files

[Insert Special Character](#)

Enter Metadata

Enter submission metadata below. Required fields are marked with *.

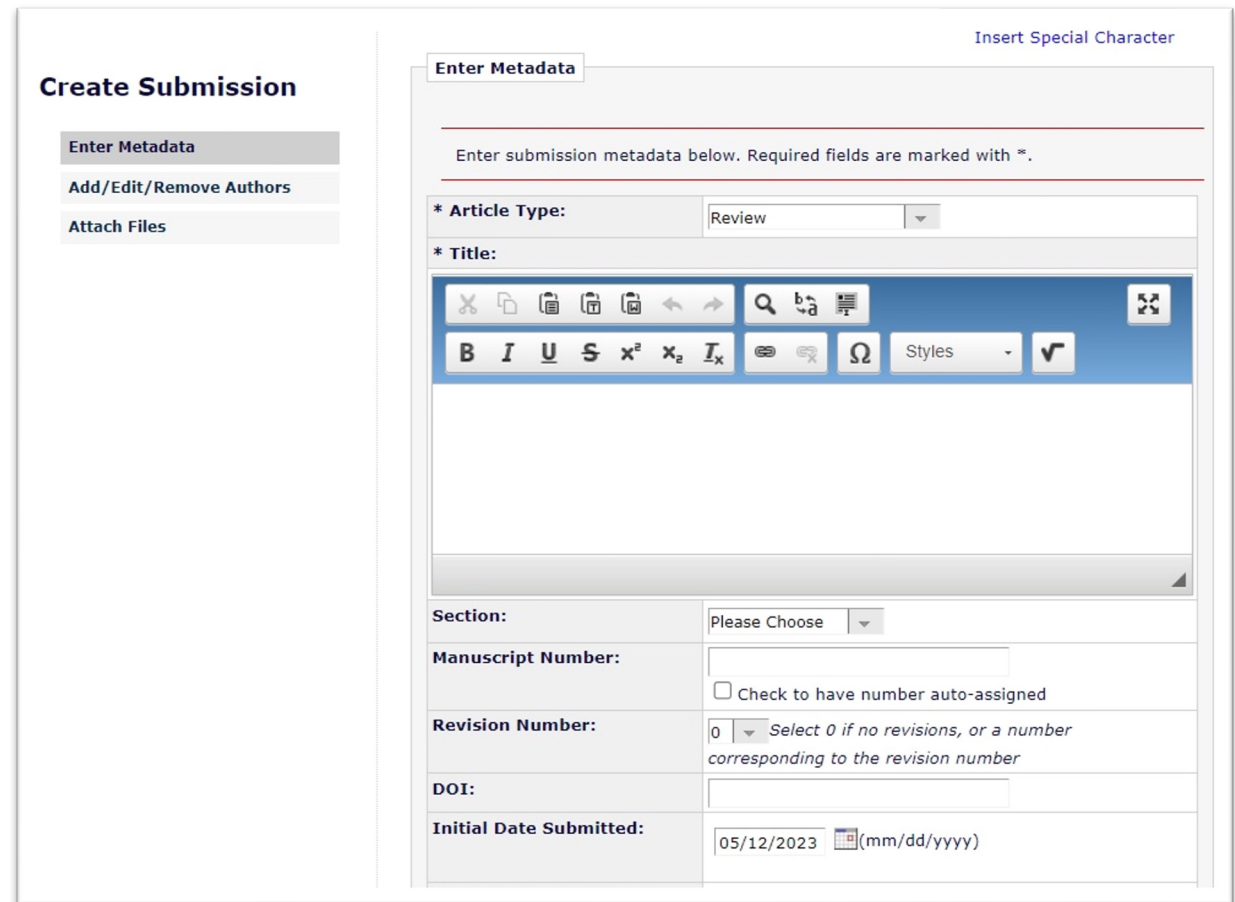
*** Article Type:**

- Please Choose
- Please Choose
- Original Study**
- Editorial
- Review
- Rapid Communication
- Case Report
- Letter to the Editor
- Commentary
- Special Issue Article
- Annual Meeting Abstract
- Editorial



Create Submission Interface: Enter Metadata

- Enter the submission metadata
- The only fields that are required by the system are the Article Type and Title when using this functionality
- Anything else that is required by the publication office will be red, but the rest of the fields are considered optional



The screenshot displays the 'Create Submission' interface. On the left, a sidebar contains three buttons: 'Enter Metadata' (highlighted), 'Add/Edit/Remove Authors', and 'Attach Files'. The main content area is titled 'Enter Metadata' and includes an 'Insert Special Character' link. Below the title, a red line indicates required fields. The form contains the following fields:

- * Article Type:** A dropdown menu with 'Review' selected.
- * Title:** A text input field with a rich text editor toolbar above it.
- Section:** A dropdown menu with 'Please Choose' selected.
- Manuscript Number:** A text input field with a checkbox labeled 'Check to have number auto-assigned'.
- Revision Number:** A dropdown menu with '0' selected and a note: 'Select 0 if no revisions, or a number corresponding to the revision number'.
- DOI:** A text input field.
- Initial Date Submitted:** A date input field with '05/12/2023' and a calendar icon, followed by '(mm/dd/yyyy)'.

Create Submission Interface: Add/Edit/Remove Authors

Create Submission

Enter Metadata

Add/Edit/Remove Authors

Attach Files

Please Add, Edit, or Remove Authors

Enter the names of anyone who be changed by updating the number manuscript may be indicated.

Current Author List

	Dr. Amelia Au Aries Systems (
--	---

+ Add Another Author

Add New Author

Insert Special Characters

Title

Given/First Name*

Middle Name

Family/Last Name*

Academic Degree(s)

Affiliation

E-mail Address

ORCID [Fetch](#)

[What is ORCID?](#)

Institution*

Start typing to display potentially matching institutions. [i](#)

Department



Create Submission Interface: Attach Files

Create Submission

- Enter Metadata
- Add/Edit/Remove Authors
- Attach Files**

[Insert Special Character](#)

Please Attach Files

Required **Items** are marked with a *. When all **Items** have been attached, click **Next** at the bottom of the page.


Item	*Manuscript	▼
------	-------------	---

Enter a **Description** and select a **Delivery Method**. To deliver files online, either choose files or drag or drop files.

Description

Delivery Method Online Web System Offline

Or Drag & Drop Files Here



Create Submission Interface

Once the attach files step is completed, the paper will be moved into the Production Initiated – No Tasks Assigned folder

When using this method, there is NO PDF created

Editorial Proposal Menu Production Tasks

**Managing Editor
Production Tasks Menu**

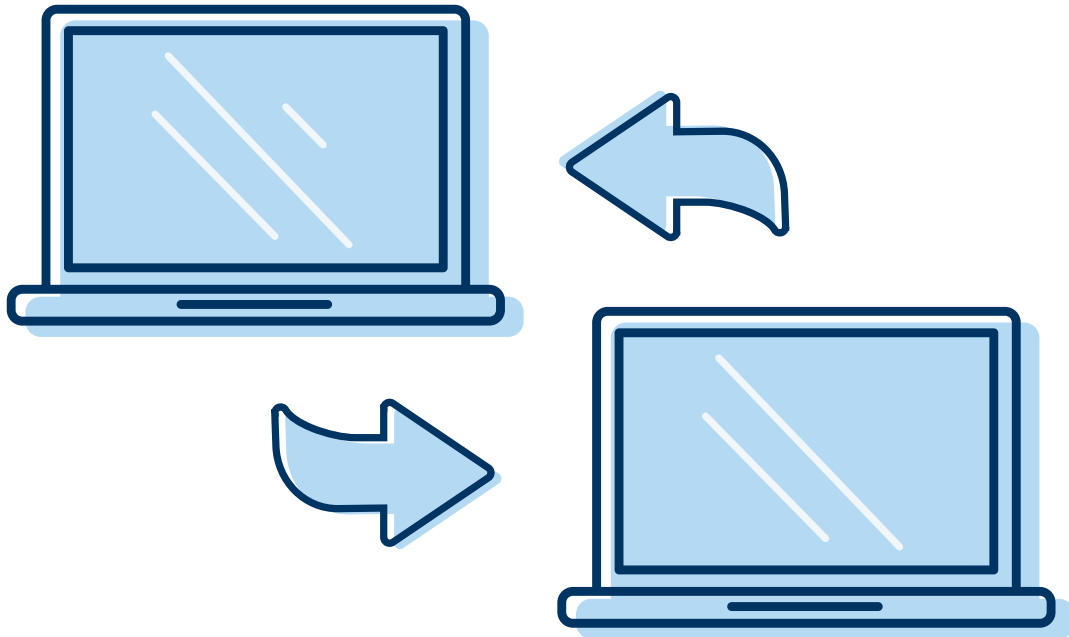
Search
Search Submissions | Search People

To-Do List
Submission Tasks Assigned to Me (7)
Schedule Group Tasks Assigned to Me (0)
'At-Risk' Submissions (0)

Overview
Production Initiated – No Tasks Assigned (3)
Submission Tasks I Have Assigned (16)
View All Submissions in Production (14)
View All Production Tasks With Authors (3)
Production Status Grid



4. Imports



- Submissions from other peer review systems can be imported directly into PM to start the production workflow
- To use this method, a publication office will need to upload a zip package along with a trigger file onto the Aries FTP
- Publications that use the import method usually have PM-only sites

Imports

- Email address can be added to the publication's import profile for success and failure notifications
- JATS and Cadmus import profiles into ProduXion Manager are available

Import Profile Parameters for: JATS Manuscript Import (ProduXion Manager)

JATS Manuscript Import (ProduXion Manager) Failure Email Address:

JATS Manuscript Import (ProduXion Manager) Success Email Address:



Imports

Imported submissions will drop into the Production Initiated – No Tasks Assigned folder unless a submission production task has been configured to be automatically assigned when production is initiated

The screenshot shows a web interface with three tabs: Editorial, Proposal Menu, and Production Tasks. The Production Tasks tab is active. On the left, the text reads "Managing Editor Production Tasks Menu". The main content area is divided into three sections: Search, To-Do List, and Overview. The Search section contains "Search Submissions | Search People". The To-Do List section contains "Submission Tasks Assigned to Me (7)", "Schedule Group Tasks Assigned to Me (0)", and "'At-Risk' Submissions (0)". The Overview section contains "Production Initiated – No Tasks Assigned (3)", "Submission Tasks I Have Assigned (16)", "View All Submissions in Production (14)", "View All Production Tasks With Authors (3)", and "Production Status Grid". The "Production Initiated – No Tasks Assigned (3)" link is highlighted with a red box.



Production Initiated – No Tasks Assigned Folder

Production-specific information is included in this folder, including Schedule Group, Submission Target Online Date, and Date Production Initiated:

Production Initiated – No Tasks Assigned

Contents: This page lists all submissions in production with no production tasks assigned, or submissions for which all production task assignments have been cancelled.


Page: 1 of 1 (3 total submissions) Results per page 10

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
View Submission Assign Production Task Change Schedule Group End Production Production Status Grid Production Details ▾ History Transmittal Form File Inventory Edit Submission Send E-mail Linked Submissions	CHRISTINETEST-D-23-00023	Unassigned	Allan Author (UNITED STATES)	Test Submission I		June 2023 Issue		Rapid Communication	May 11 2023 1:45PM	May 11 2023 1:49PM	Jun 30 2023 12:00AM



Production Details

Contains details related to the production workflow

Full Title:	Test Submission I
Short Title:	
Corresponding Author:	Allan Author UNITED STATES [Proxy]
Corresponding Author E-Mail:	trash17@ariessc.com
Author Comments:	
Other Authors:	mary mary, Aries Systems Corporation Aries Systems Corporation Author Status
Article Type:	Rapid Communication
Section/Category:	
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Requested Editor:	
Editorial Status Date:	May 12 2023 12:50PM
Current Editorial Status:	With Editor
Production Status:	In Production
Corresponding Production Editor:	None
Schedule Group:	June 2023 Issue
Submission Target Online Publication Date:	06/30/2023  (mm/dd/yyyy)
Schedule Group Target Online Publication Date:	Jun 30 2023 12:00AM
Schedule Group Target Publication Date:	Jun 30 2023 12:00AM
Schedule Group Target Volume:	2
Schedule Group Target Issue:	4
Position in Schedule Group Contents:	1
Target Number of Pages:	0
Black and White Image Count:	0
Color Image Count:	0



Production Details

- Production Tasks will begin to populate on the Production Details page as the production workflow proceeds
- The task due date for an open task can be viewed and updated as needed from the Production Details page

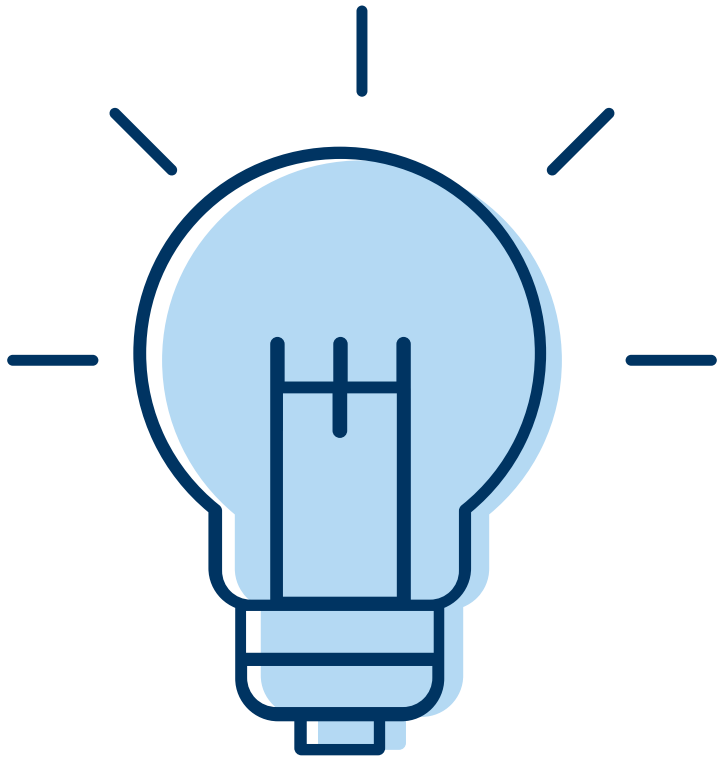
Production Tasks	
Description:	Copyediting
Production Task Status:	Completed
Assigned To:	☑ Claire Commentator ▾ [Proxy]
Date Assigned:	May 12, 2023
Date Task Due:	May 12, 2023
Completed	May 12, 2023
<hr/>	
Description:	Artwork Quality Check
Production Task Status:	Completed
Assigned To:	☑ Archie Assistant ▾ [Proxy]
Date Assigned:	May 12, 2023
Date Task Due:	May 22, 2023
Completed	May 12, 2023
<hr/>	
Description:	Final Proofs
Production Task Status:	Open
Assigned To:	☑ Dwight Deputy ▾ [Proxy]
Date Assigned:	May 12, 2023
Date Task Due:	<input type="text" value="05/12/2023"/> 📅(mm/dd/yyyy)
Elapsed Days (since assignment):	0



File Inventory

Submission Files											
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action	Item	Description <small>(Limit 256 characters)</small>	Item Family	File Name	Size	Modified	QC	Display On TF	
<input type="checkbox"/>		Download	Manuscript	Manuscript	Document	FullPaper_Manuscript.docx	11.5 KB	May 15 2023 1:59PM		<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Download Preview	Figure	Figure	Figure	Figure1.jpg	48.8 KB	May 15 2023 1:59PM		<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Download	Supplemental Material	Supplemental Material	Supplemental	Test Dataset.xlsx	7.9 KB	May 15 2023 2:00PM		<input checked="" type="checkbox"/>	

Companion Files Upload Companion Files												
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action	Color ▲▼	Item ▲▼	Description <small>(Limit 256 characters)</small> ▲▼ Expand All Collapse All	Item Family ▲▼	File Name ▲▼	Size ▲▼	Modified ▲▼	Operator ▲▼	QC ▲▼	Display On TF
<input type="checkbox"/>		Download Replace Hide	Yellow Change	Companion File	Second Proof	Supplemental	Second_Proof.docx	12.6 KB	May 15 2023 2:04PM	mary mary		
<input type="checkbox"/>		Download Replace Hide	Green Change	Companion File	Final Proof	Supplemental	Final_Proof.docx	12.6 KB	May 15 2023 2:04PM	mary mary		
<input type="checkbox"/>		Download Replace Hide	Red Change	Companion File	Author Proof	Supplemental	Author_Proof.docx	12.6 KB	May 15 2023 2:04PM	mary mary		



Production Tasks

Assignment & Tracking















Production Tasks

Production tasks allow publications to do the following:



- Assign a submission to a person to complete tasks like Copyediting, Typesetting, Proofreading, etc.
- Set due dates for each task within the workflow
- Control who can carry out each task
- Choose which files are automatically sent as part of the assignment
- Allow recipients to upload new files when submitting tasks
- Automatically record assignment and completion dates for each task/activity





Production Tasks

-  View Production Status Grid
-  View At-Risk Submissions
-  View All Submissions in Production
-  End Production/Return to Production
-  Assign Submission Production Task
-  Assign Editorial Tasks in Task Manager
-  Assign Schedule Group Production Task
-  Cancel Production Task Assignment
-  Override Submission Production Task Due Date
-  Override Schedule Group Production Task Due Date
-  Receive Production Task
-  Create Automated Submission Tasks Reminders
-  Create Automated Schedule Group Tasks Reminders
-  Send Production Reminders



- Action** 
- View Submission
- Assign Production Task**
- Change Schedule Group
- End Production
- Production Status Grid
- Production Details 
- History
- Transmittal Form
- File Inventory
- Edit Submission
- Send E-mail
- Linked Submissions

- Action** 
- View Assignment Letter
- Submit Task**
- Reassign Task
- Assign Production Task
- Assign to Schedule Group
- Production Details 
- History
- Transmittal Form
- Edit Submission
- Send E-mail



Production Tasks

Action	Manuscript Number	DOI	Author Name	Article Title
<ul style="list-style-type: none">Production DetailsHistoryTransmittal FormAssign Production TaskChange Schedule GroupFile InventoryEnd ProductionSend E-mailLinked Submissions	CHRISTINETEST D-23-00023		Allan Author (UNITED STATES)	Test Submission I

Select the production task you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear.

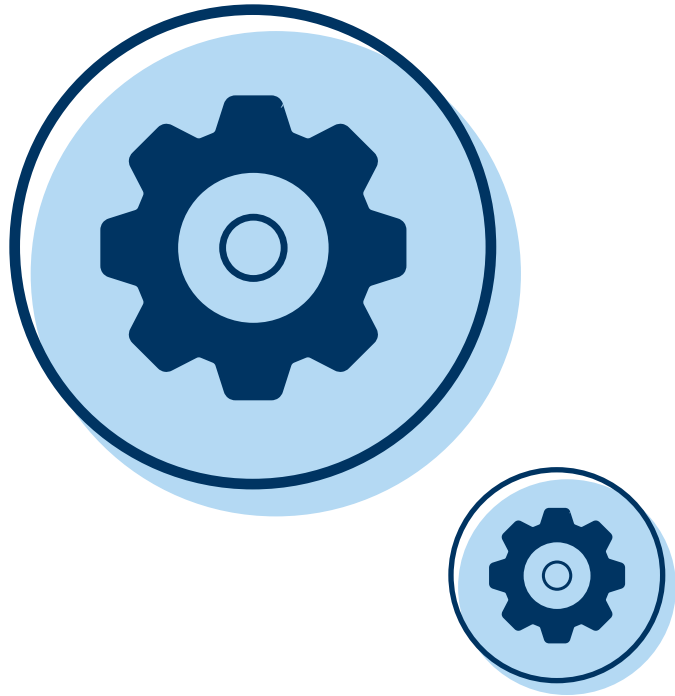
Schedule Group: June 2023 Issue

Production Task:

Cancel

Proceed with Selected Task

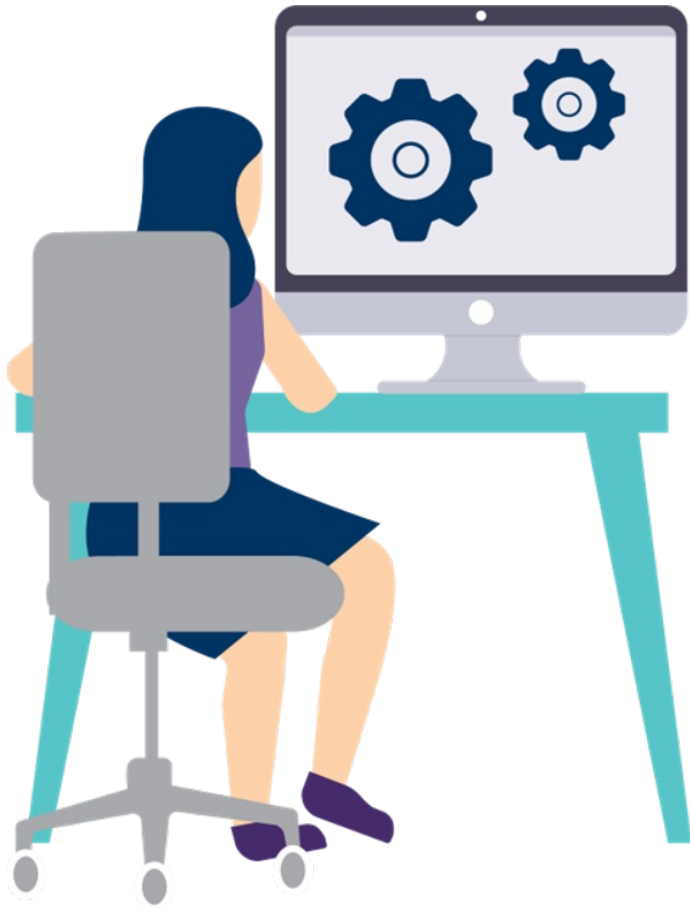




Custom Production Workflows

Leveraging flexible configurations

Custom Production Workflows



- Unique production workflows can be enabled by Article Type
- Configure an initial task to automatically assign when production is initiated
- Configure trigger tasks to automatically assign the next task in the production workflow
- Deliver task assignment files and import task submissions via FTP

Custom Production Workflows

Create and edit production tasks and workflows in:

PolicyManager > Configure Submission Workflows and Production Tasks

Standard			
All Submission Production Tasks		Copy	Edit
Custom Submission Workflows			
Author Review	Remove	Copy	Edit
Case Study Workflow		Copy	Edit
Conversion Workflow	Remove	Copy	Edit
Demo Workflow		Copy	Edit
Original Article Workflow		Copy	Edit
Podcast Production		Copy	Edit


New Custom Workflow Name: Insert Special Character








Maximum Workflow Name is 100 characters




Custom Production Workflows

Add and organize production tasks for each custom workflow:


Workflow Name: 

	Order	Task Type (◆=Milestone)	Assign if First Task 		Trigger Task(s) 	Allow Repeats 
	<input type="text" value="1"/>	Artwork Quality Check [Edit]	<input checked="" type="checkbox"/>			
	<input type="text" value="2"/>	Copyright Check [Edit]			Artwork Quality Check	<input checked="" type="checkbox"/>
	<input type="text" value="3"/>	Copyediting [Edit]				

 Add Selection(s) to Workflow

Custom Production Workflows

Custom workflows can be enabled by Article Type in:
PolicyManager > Edit Article Types

 **Production Tracking Parameters:**

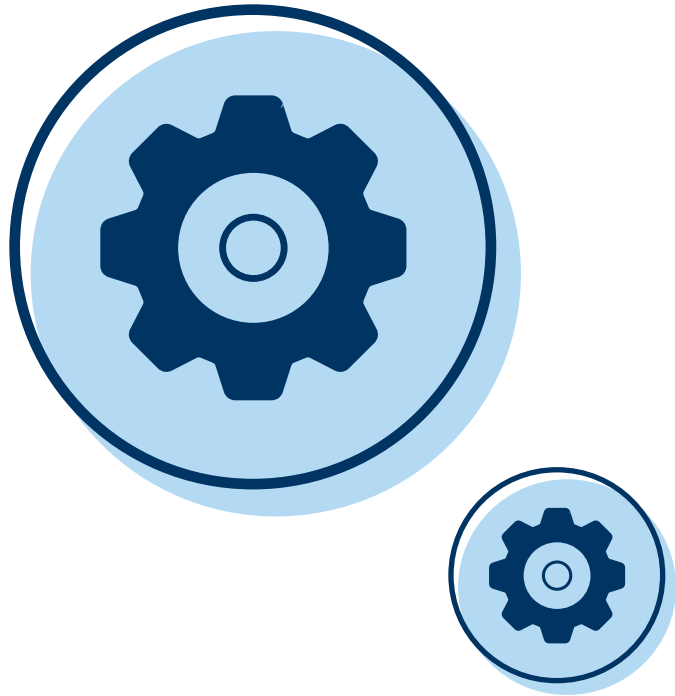
Use Task Manager Workflow:

Use Submission Production Workflow:

Automatically set the Final Disposition to 'Accept' when the Author is notified of the selected Decisions:

- All Submission Production Tasks
- Author Review
- Case Study Workflow
- Conversion Workflow
- Demo Workflow
- Original Article Workflow**
- Podcast Production





Production Status Grid

Convenient, customizable snapshot

Production Status Grid

Production Editor Production Tasks Menu

Search

[Search Submissions](#) | [Search People](#)

To-Do List

[Submission Tasks Assigned to Me](#) (7)

[Schedule Group Tasks Assigned to Me](#) (0)

['At-Risk' Submissions](#) (0)

Overview

[Production Initiated – No Tasks Assigned](#) (12)

[Submission Tasks I Have Assigned](#) (1)

[View All Submissions in Production](#) (38)

[View All Production Tasks With Authors](#) (4)

[Production Status Grid](#)



Production Status Grid

Quicklinks

Production Status Grid

Show: All Submissions in Production

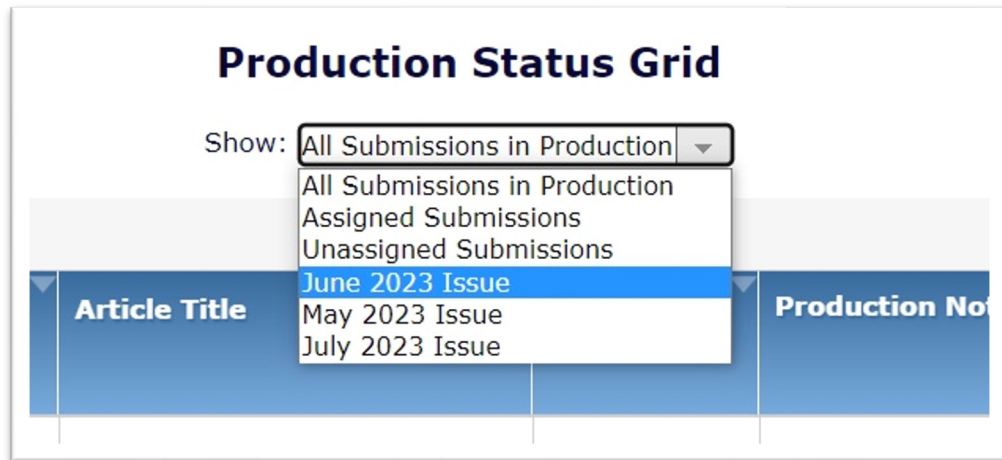
Page: 1 of 2 (38 total submissions) 1 2 ▶▶

Action	Production Status	Date Production Initiated	Task 1 - Simple XML Intake	Task 2 - XML Edit (Copyedit)	Task 3 - Copyedit Review	Task 4 - XML Edit (Author Proof)	Task 5 - XML Edit (Proof Review)	Task 6 - Final Proof	Task 7 - Author Publication Notification
<ul style="list-style-type: none"> Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory End Production Send E-mail Linked Submissions 		Feb 17, 2022	Submitted Feb 17, 2022 mary mary	Submitted Feb 17, 2022 Chris Copyeditor	Submitted Feb 17, 2022 Archie Assistant	Submitted Feb 17, 2022 mary mary	Submitted Feb 17, 2022 Chris Copyeditor	Submitted Feb 17, 2022 Dwight Deputy	Submitted Feb 17, 2022 mary mary
<ul style="list-style-type: none"> Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory End Production Send E-mail Linked Submissions 		Feb 17, 2022	Submitted Feb 17, 2022 mary mary	Submitted Feb 17, 2022 Chris Copyeditor	Submitted Feb 17, 2022 Archie Assistant	Submitted Feb 17, 2022 Abigail Author	Submitted Feb 17, 2022 Chris Copyeditor	Submitted Feb 17, 2022 Dwight Deputy	Submitted Feb 17, 2022 Abigail Author
<ul style="list-style-type: none"> Production Details 									



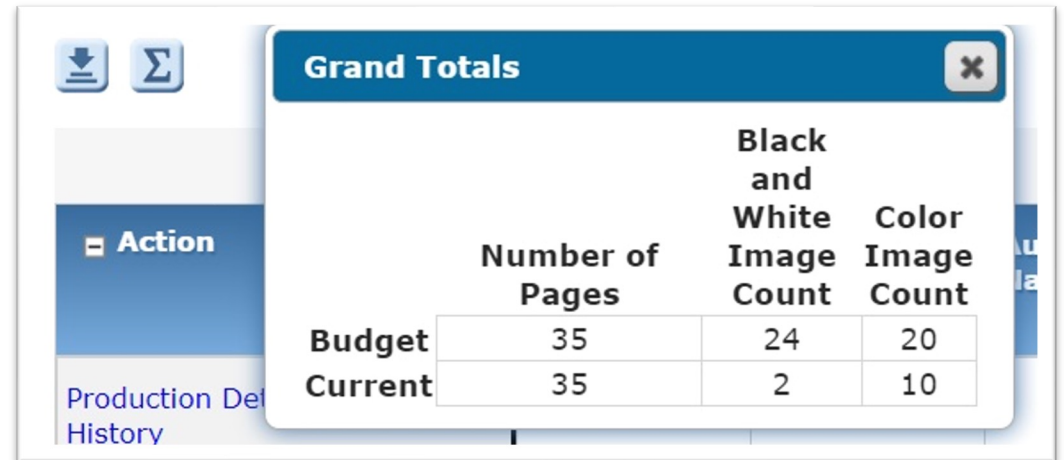
Production Status Grid

Filter the Production Status Grid
by Schedule Group:



The screenshot shows the 'Production Status Grid' interface. At the top, there is a 'Show:' dropdown menu currently set to 'All Submissions in Production'. The dropdown menu is open, displaying the following options: 'All Submissions in Production', 'Assigned Submissions', 'Unassigned Submissions', 'June 2023 Issue' (highlighted in blue), 'May 2023 Issue', and 'July 2023 Issue'. Below the dropdown, the grid headers are visible, including 'Article Title' and 'Production No'.

Download the Production Status
Grid or view current grand totals:



The screenshot shows the 'Production Status Grid' interface with a 'Grand Totals' popup window open. The popup window has a blue header with the text 'Grand Totals' and a close button (X). Below the header, there is a table with the following data:

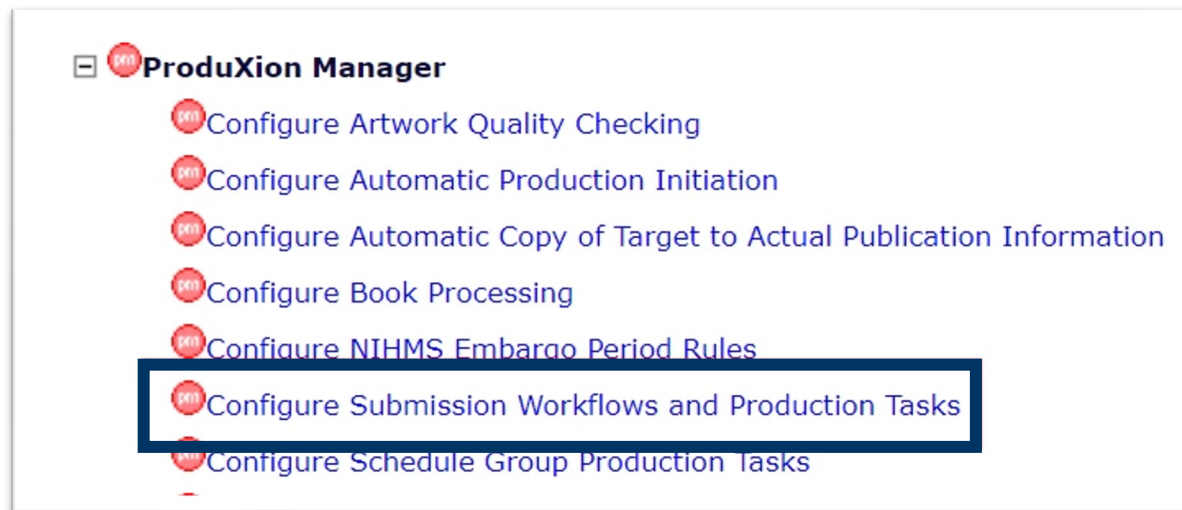
	Number of Pages	Black and White Image Count	Color Image Count
Budget	35	24	20
Current	35	2	10

Below the table, there is a link for 'Production Details History'. In the background, there are icons for download and sum, and a blue 'Action' button.



Production Status Grid

Only production tasks configured to appear in the Production Status Grid will be displayed:



ProduXion Manager

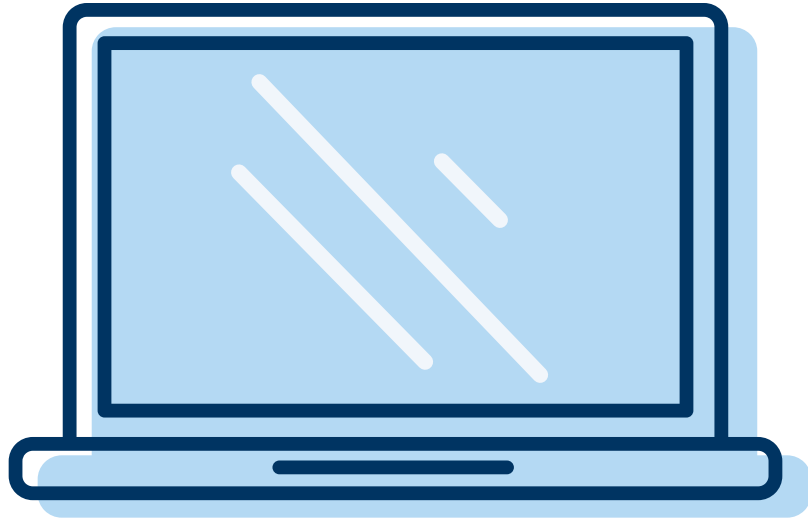
- Configure Artwork Quality Checking
- Configure Automatic Production Initiation
- Configure Automatic Copy of Target to Actual Publication Information
- Configure Book Processing
- Configure NIHMS Embargo Period Rules
- Configure Submission Workflows and Production Tasks**
- Configure Schedule Group Production Tasks



Scheduling and Due Date Options

- Show Task in Production Status Grid
- Include this task in 'At Risk' and 'Must Start By' date display





Schedule Groups

Submissions that publish together

Schedule Groups

- Submissions can be assigned to Schedule Groups to:
 - Define key publication dates
 - Define a running order/Table of Contents
 - Maintain targets for content (number of pages, figures, etc.)
- A submission can belong to only one schedule group at a time but can be moved freely between groups



Add Schedule Groups

Scheduling

- Manage Schedule Groups
- Add Schedule Group**
- Closed Schedule Groups

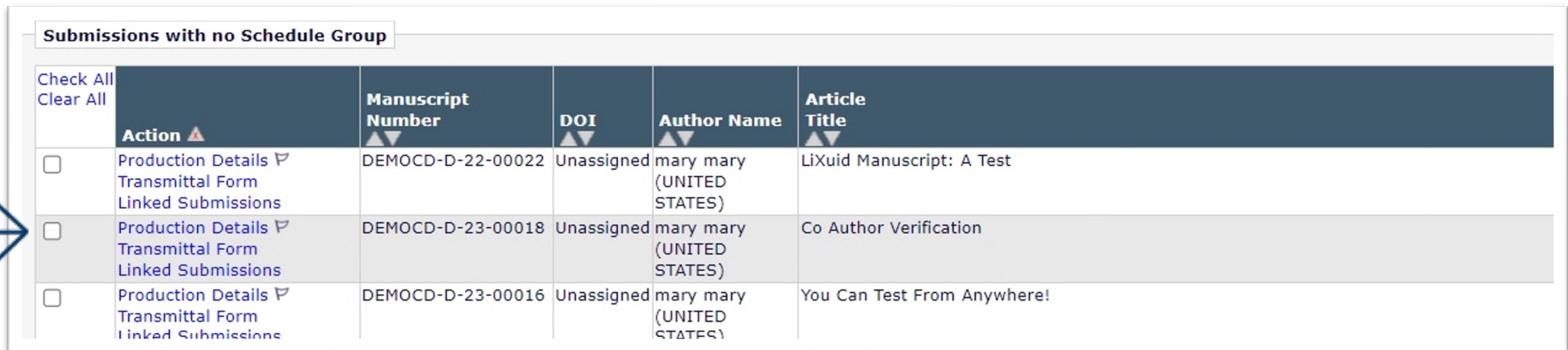


Add Schedule Group

Schedule Group Description:	<input type="text" value="June 2023"/> Insert Special Character <small>Maximum Schedule Group Description is 100 character.</small>
Schedule Group Notes:	<input type="text" value="Publishing in June 2023."/>
Schedule Group Target Online Publication Date:	<input type="text" value="06/30/2023"/> <input type="button" value="Calendar"/> (mm/dd/yyyy)
Schedule Group Target Publication Date:	<input type="text" value="06/30/2023"/> <input type="button" value="Calendar"/> (mm/dd/yyyy)
Schedule Group Target Publication Volume:	<input type="text" value="4"/>
Year:	<input type="text" value="2023"/>
Schedule Group Target Publication Issue:	<input type="text" value="10"/>
Target Number of Submissions:	<input type="text" value="25"/>
Page Budget:	<input type="text" value="150"/>
Black and White Image Budget:	<input type="text" value="15"/>
Color Image Budget:	<input type="text" value="15"/>

Add Schedule Groups

- After creating a new Schedule Group, the next page will list all submissions with no Schedule Group
- Choose which submissions should be added to the Schedule Group by checking the boxes in the leftmost column



Submissions with no Schedule Group					
Check All Clear All	Action ▲	Manuscript Number ▲▼	DOI ▲▼	Author Name ▲▼	Article Title ▲▼
<input type="checkbox"/>	Production Details ▼ Transmittal Form Linked Submissions	DEMOCD-D-22-00022	Unassigned	mary mary (UNITED STATES)	LiXuid Manuscript: A Test
<input type="checkbox"/>	Production Details ▼ Transmittal Form Linked Submissions	DEMOCD-D-23-00018	Unassigned	mary mary (UNITED STATES)	Co Author Verification
<input type="checkbox"/>	Production Details ▼ Transmittal Form Linked Submissions	DEMOCD-D-23-00016	Unassigned	mary mary (UNITED STATES)	You Can Test From Anywhere!

Add Schedule Groups

A submission's assigned Schedule Group is reflected on the Production Status Grid

Action	Manuscript Number	DOI	Author Name	Article Title	Date Production Initiated	Schedule Group	Production Status
Production Details ▾ History Transmittal Form Assign Production Task Change Schedule Group File Inventory End Production Send E-mail Linked Submissions	DEMOCD-D-23-00016		mary mary ▾ (UNITED STATES)	You Can Test From Anywhere!	Feb 14, 2023	June 2023	



Manage Schedule Groups

Scheduling

- Manage Schedule Groups
- Add Schedule Group
- Closed Schedule Groups



Manage Schedule Groups

Page: 1 of 1 (5 total Schedule Groups)

Action ▲	Schedule Group ▲▼	Target Number of Submissions ▲▼	Current Number of Submissions ▲▼	Page Budget ▲▼	Current Page Total ▲▼	Target Publication Date ▲▼
Edit Group Details Assign Production Task Batch Assign Submission Task Production Status Grid History File Inventory Copy Group Close Group	July 2023	20	0	115	0	Jul 31, 2023
Edit Group Details Assign Production Task Batch Assign Submission Task Production Status Grid History File Inventory Copy Group Close Group	June 2023	25	1	150	0	Jun 30, 2023



Manage Schedule Groups

Edit Schedule Group Details/Add Submissions

Submit

Cancel

Add Submissions

Schedule Group Description:

[Insert Special Character](#)

July 2023

Maximum Schedule Group Description is 100 characters

Schedule Group Notes:

Schedule Group Target Online Publication Date:

07/31/2023



(mm/dd/yyyy)

Schedule Group Target Publication Date:

07/31/2023



(mm/dd/yyyy)



Manage Schedule Groups

Add Submission to Group July 2023

Select one or more submissions and click the 'Add to Schedule Group' button to add them to the Schedule Group. The submission will be removed from all Schedule Groups it is currently assigned to.

Cancel

Add to Schedule Group

Select from Submissions Currently Assigned to Other Schedule Groups

Add Submission to Group July 2023

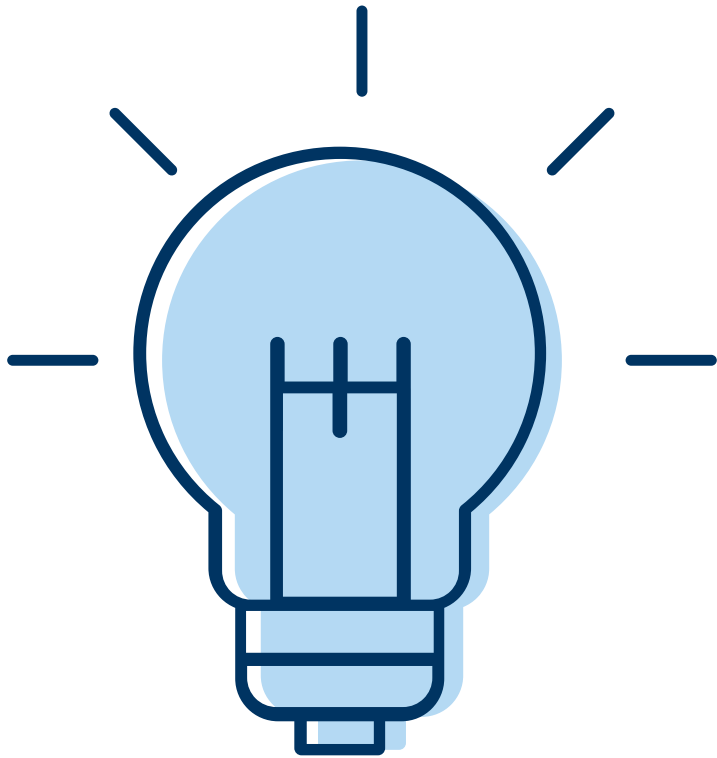
Select one or more submissions and click the 'Add to Schedule Group' button to add them to the Schedule Group. The submission will be removed from all Schedule Groups it is currently assigned to.

Cancel

Add to Schedule Group

Select from Unassigned Submissions





Schedule Group Production Task

One task, one person, one group

Schedule Groups Production Tasks



- Schedule Group Production tasks can be used to assign one task to one person for all submissions assigned to a Schedule Group
- Suitable for tasks that are applicable to Schedule Groups rather than individual submissions, such as an Issue Proof

Schedule Group Production Tasks

Manage Schedule Groups

Page: 1 of 1 (5 total Schedule Groups)

Action	Schedule Group	Target Number of Submissions	Current Number of Submissions	Page Budget	Current Page Total	Target Publication Date
<ul style="list-style-type: none"> Assign Production Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group 	July 2023	20	0	115	0	Jul 31, 2023
<ul style="list-style-type: none"> Assign Production Task Batch Assign Submission Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group 	June 2023	25	1	150	0	Jun 30, 2023



Schedule Group Production Tasks

Assign Production Task for Schedule Group

Select the production task you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear.

Schedule Group: May 2023





Production Task: Schedule Group Task - Printer Information ▼

SCHEDULE GROUP TASK HISTORY

Date Task Assigned	Production Task	Date Task Due	Assigned By	Assigned To	Production Task Status
Feb 01, 2023	Schedule Group Task - Printer Information		Mary Editor	Christine Donovan	Completed




Adding Headers to Schedule Groups

Table of Contents							
Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page
Remove Header Edit Header	1		Cover Image		1	1	1
Production Details  Transmittal Form Remove from Group Linked Submissions	2	DEMOCD-D-23-00016	Editorial	Mary Editor	3	2	4
+ Additional Manuscript Details							
Remove Header Edit Header	3		Advertisement		1	5	5
Production Details   Transmittal Form Remove from Group Linked Submissions	4	DEMOCD-D-19-00002	Original Study	Mary Editor	4	6	9
+ Additional Manuscript Details							
Production Details  Transmittal Form Remove from Group Linked Submissions	5	DEMOCD-D-21-00016	Editorial	Mary Editor	3	10	12



Adding Headers to Schedule Groups

Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name
Production Details  Transmittal Form Remove from Group Linked Submissions	1	CHRISTINETEST-D-23-00023	Rapid Communication	Allan Author

[Update TOC](#) [Insert Header](#)




Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Submission Target Online Date	Black and White Image Count
Production Details Transmittal Form Remove from Group Linked Submissions	1	CHRISTINETEST-D-23-00023	Rapid Communication	Allan Author	35	1	35			Scientific Study	Jun 30 2023 12:00AM	2
Save Changes Cancel Changes	2	Advertisement										

[Update TOC](#) [Insert Header](#)



Adding Headers to Schedule Groups

Table of Contents							
Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page
Remove Header Edit Header	1		Advertisement		1	1	1
Production Details  Transmittal Form Remove from Group Linked Submissions	2	CHRISTINETEST-D-23-00023	Rapid Communication	Allan Author	35	2	36

[Update TOC](#) [Insert Header](#)



Copying Schedule Groups

Manage Schedule Groups

Action	Schedule Group
Assign Production Task	July 2023 Issue
Edit Group Details	
Production Status Grid	
History	
File Inventor	
Copy Group	
Close Group	



Copy Schedule Group: Confirm Data to Copy



Please confirm the information to copy when creating the new Schedule Group. When copying TOC entries, new Submissions are not created; instead, the existing Submissions are initially assigned to both the original and copy. For TOC Header entries, a new, independent copy of each Header is created in the new group.

- Copy Schedule Group Metadata only
- Copy Schedule Group Table of Contents only
- Copy Metadata plus Table of Contents

Cancel Proceed

Closing Schedule Groups

Manage Schedule Groups

Action 	Schedule Group 
Assign Production Task	July 2023 Issue
Edit Group Details	
Production Status Grid	
History	
File Inventory	
Copy Group	
Close Group	



The "May 2023 Issue" Schedule Group has open production tasks associated with it:

- 2 Submissions have open submission production tasks.
 - Click this [Production Status Grid](#) link to cancel the Close Group process and switch to a list of production tasks associated with this Schedule Group.
- 1 Schedule Group Production Task is still in progress.
 - Click this [History](#) link to display information for this Schedule Group.

To cancel these tasks automatically and close the group, click one of the following buttons depending on whether you want to send cancellation letters. Submissions that have no open tasks but are still in production will have production ended on them.

[Close Group and Send Letters](#)

[Close Group without Sending Letters](#)

To leave the group open without cancelling any tasks, click 'Do Not Close Group'.

[Do Not Close Group](#)



Closing Schedule Groups

Closed Schedule Groups can be reopened from the Closed Schedule Groups folder:

Scheduling

- Manage Schedule Groups
- Add Schedule Group
- Closed Schedule Groups**

Closed Schedule Groups

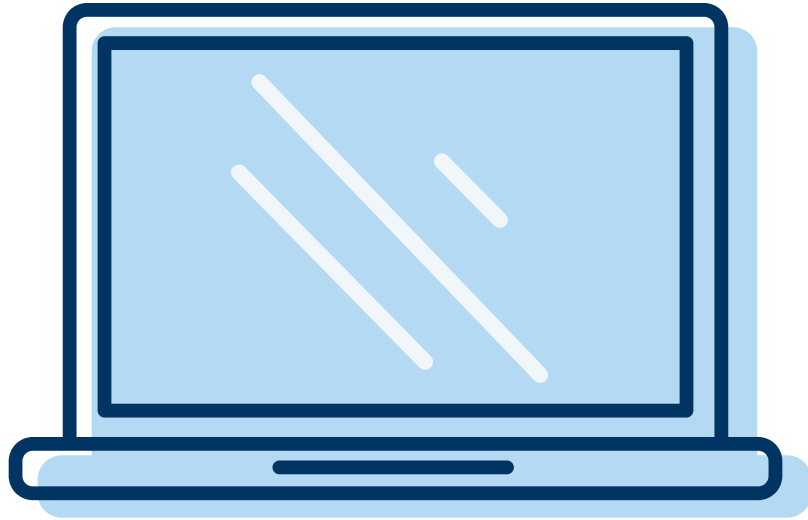
The Schedule Groups listed below have been closed. New Production Tasks cannot be assigned for these groups.

Page: 1 of 1 (2 total Schedule Groups)

Action	Schedule Group	Target Number of Submissions	Current Number of Submissions	Page Budget	Page Total
Re-open Group Production Status Grid	July 2023 Issue	0	0	0	0
Re-open Group Production Status Grid	May 2023 Issue	2	3	0	0

Page: 1 of 1 (2 total Schedule Groups)



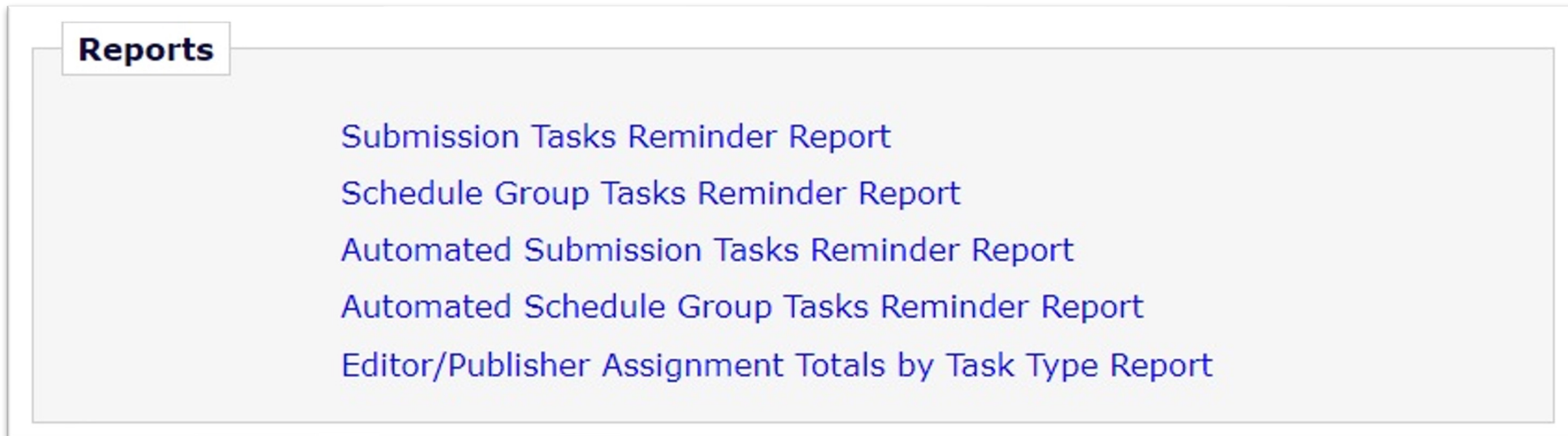


Production Reporting

Automated and manual reports available in PM

ProduXion Manager Reporting

- ProduXion Manager offers automated and manual reports that are specific to production
- Reports are available from the Editor/Publisher Main Menu
- Use reminder reports to automatically or manually send task reminders
- Assess Editor/Publisher workloads with the assignment totals report



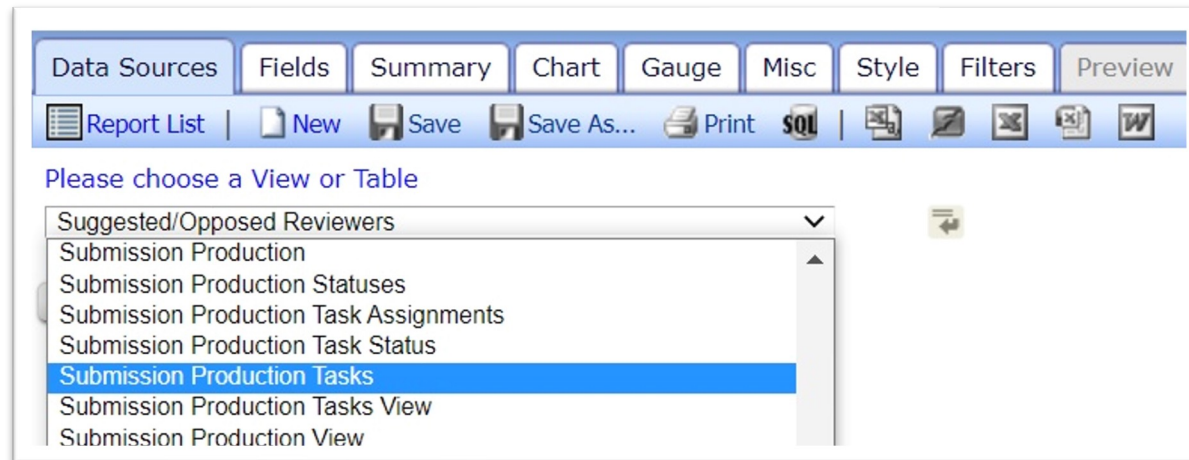
ProduXion Manager Reporting

Run canned
production reports or
create custom
production reports in
Enterprise Analytics
Reporting (EAR)



Production Tracking Reports

Avg Days to Complete Production Tasks in selected timeframe
Submission Turnaround Times - Editorial and Production
Submission Turnaround Times - Production



Resources

- Help System
- Aries Video Library:
 - [Introduction to ProduXion Manager](#)
 - Tutorials on PM features!
- Aries Blog/Newsletter:
 - [End-to-End Solution: Bridging Editorial and Production Workflows](#)
 - [Efficient Journal Production Management for Issue- and Article-Based Workflows](#)
 - [Enterprise View for Cross-Publication Production Task Management](#)
- Your Account Coordinator

Video Library

Browse helpful videos on Editorial Manager and ProduXion Manager

Search: Filter by:

LiXuid Manuscript: Direct Content Editing

The Aries Ecosystem

Introduction to ProduXion Manager

Introduction to the NavBar

LiXuid Manuscript: A Limitless Production Experience

Transferring Manuscript Metadata and Files to Preprint Servers

Resetting User Account Password

Soliciting ORCID iDs

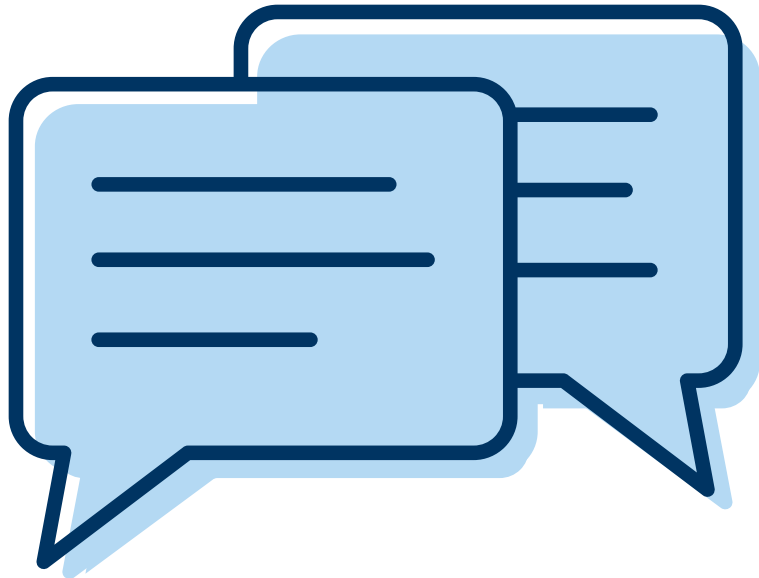
Automated Image Quality Check

Journal Schedule Groups

Introduction to Role Configuration

Configuring a Production Status





Questions?

Thank you!

Stay Connected

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CDonovan@ariessys.com

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