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EMUG 2023



Courtyard Boston Downtown Hotel
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Aries
systems.



EMUG 2023

ProduXion Manager (PM) User Group

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Agenda

Welcome to
EMUG: Day 2

- Enterprise View (EV)
- Task Manager
- File Inventory and File References
- PM and LiXuid Manuscript
- Reporting in PM
- Looking Ahead
- Resources
- Questions





Enterprise View (EV)

*Cross-Publication
Management*

Enterprise View: Cross-Publication Task Handling

New Enterprise View (EV) tab and Menu include:

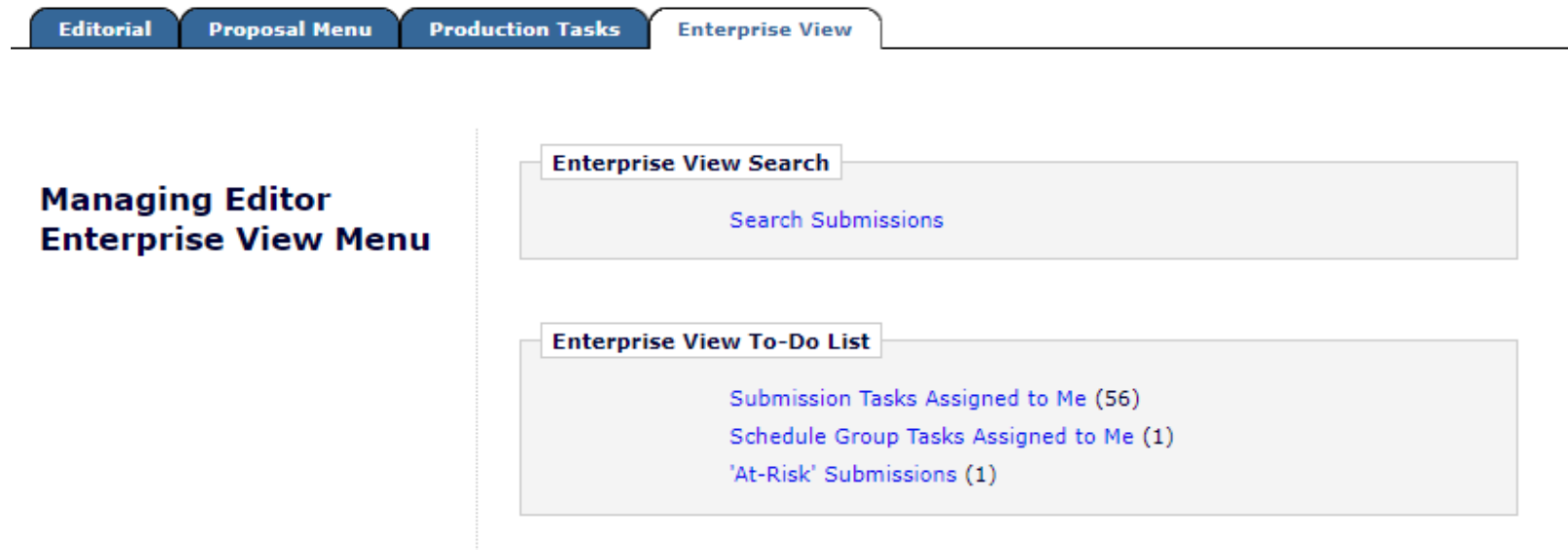
- Limited version of the production To-Do List: "Submission Tasks Assigned to Me" and "Schedule Group Tasks Assigned to Me"
- Links to Cross-Publication Enterprise Analytics Reporting and to Search Submissions (cross-publication) for users with associated RoleManager permissions

The screenshot shows a navigation bar with four tabs: Editorial, Proposal Menu, Production Tasks, and Enterprise View. Below the tabs, the page is titled "Managing Editor Enterprise View Menu". The main content area is divided into four sections:

- Enterprise View Search**: Contains a link for "Search Submissions".
- Enterprise View To-Do List**: Contains three links: "Submission Tasks Assigned to Me (56)", "Schedule Group Tasks Assigned to Me (1)", and "'At-Risk' Submissions (1)".
- Enterprise View Overview**: Contains five links: "Production Initiated - No Tasks Assigned (89)", "Submission Tasks I Have Assigned (82)", "Schedule Group Tasks I Have Assigned (4)", "View All Submissions in Production (506)", and "View All Tasks With Authors (0)".
- Scheduling**: Contains three links: "Manage Schedule Groups", "Add Schedule Group", and "Closed Schedule Groups".



Enterprise View: Cross-Publication Task Handling



"Submission Tasks Assigned to Me" and "Schedule Group Tasks Assigned to Me" folders display any submissions with tasks assigned to the logged-in user across all publications that have been configured for the user to access

Enterprise View: Cross-Publication Task Handling

- From the main EV menu, navigate to "Submission Tasks Assigned to Me"
- Submissions on a different publication site display one link in the action column: "Go to Task"
 - Clicking the link takes the user to the same EV folder on the other site (after automatic login)
- Enterprise View Assignment folders show the Publication Code for each submission (shown here as SAMDE)

SITE 1		SITE 2	
Action	Publication Code	Action	Publication Code
Assignment Files Submit Task Reassign Task Assign to Schedule Group Production Details ▾ History Transmittal Form Edit Submission Send E-mail	SAMDE	Go To Task	SAMDE
Go To Task	SALLYD	Submit Task Reassign Task Assign Production Task Assign to Schedule Group Production Details ▾ History Transmittal Form Edit Submission Send E-mail	SALLYD
View Assignment Letter Submit Task		Go To Task	SAMDE

Enterprise View: Cross-Publication Task Handling

- Configure cross-publication login via “Update My Information” page (near your username in the top right corner) by selecting "Edit 'Go to' Publication List"
- Editors with “Search People” permission can set a user’s default login menu to “Enterprise View Menu”

The screenshot shows the 'Update My Information' page. On the left, there is a box with the title 'Update My Information' and instructions: 'To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.' Below this, there is a button labeled 'Edit 'Go to' Publication List' which is highlighted with a blue box and a green arrow pointing to the right. Below that is a button labeled 'Correspondence History'.

On the right, there is a section titled ''Go to' Publication List' containing a table with the following data:

Publication	Matching Record?	Auto Login?	
Publication1	Yes	-	Remove
Publication2	No	-	Verify Remove
Publication3	Yes	Yes	Remove

Below the table, there is a form labeled 'Add Publication (Acronym):' with an input field and an 'Add' button. At the bottom of the page, there are three buttons: 'Batch Verify', 'Copy List to Matching Records', and 'Close'.



Enterprise View: Cross-Publication Task Handling

- Users with permission can search for submissions across publications with the EV submission search tool
- Available via a link on the EV tab and in the “Go to” drop-down menu in the top navigation bar

Managing Editor
Enterprise View Menu

Enterprise View Search
Search Submissions

Search Submissions
Manuscript Number is containing 'sa'

Show: Enterprise View
Enterprise View
SAMDE
SALLYD

Page: 1 of 1 (145 total submissions) 250

Select	Action	Publication Code	Manuscript Number	Author Name	Article Title	Article Type	Smart Tags	Keywords	Classification	Corresponding Production Editor	Production Status
<input type="checkbox"/>	Go to Submission	SALLYD	SALLYTEST82-D-10-00028	Josh Journalman	Quantum Emergent Phenomena	Original Study		one;two			Ready for Graphics Specialist
<input type="checkbox"/>	Go to Submission	SALLYD	SALLYTEST82-D-11-00004	Ann Author	Requesting Additional Information	Original Study					Ready for Graphics Specialist

Search Submissions in Enterprise View

- Executed against the Publisher's Unified Database (UDB), pulling from any publication the user is authorized to access



Search Submissions in Enterprise View

For most search criteria/selector combinations, the Value column displays an empty text box where the user must enter the value

Search submissions selection criteria

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#)

Search Definition:

[Help with Searching](#) [Insert Special Character](#) [Value Options](#) [Advanced Criteria](#)

(	Criterion	Is/Is not	Selector	Value)
	<input type="text" value="Discussion Comments"/>	<input type="text" value="is"/>	<input type="text" value="Contains"/>	<input type="text"/>	

Help with Searching

- Use the [Value Options](#) link to view standard lists and classifications; you can copy and paste Values from there.
- The required format for date entry is mm/dd/yyyy. If the date is not entered in this format, you will be required to re-enter the date in the specified format.
- You must enter at least one set of criteria in the Value box to execute a search. We recommend entering as much criteria as you know. The more refined the criteria, the quicker your results will be returned.
- If you combine AND and OR relations, use the parentheses to ensure the evaluations are carried out in the right order. If you do not use parentheses, or combine AND and OR within parentheses, the AND relationship is evaluated first.
- Selections are case-insensitive. You may enter any mixed case value.
- You can check for empty (no value) fields by selecting the "Unspecified" Selector.



Search Submissions in Enterprise View

- **Exceptions to the Value column displaying in the Enterprise View search**
 - “Discussion Status”: Dropdown menu displays two options: Open, Closed

Search submissions selection criteria

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#)

Search Definition:

[Help with Searching](#) [Insert Special Character](#) [Value Options](#) [Advanced Criteria](#)

(	Criterion	Is/Is not	Selector	Value)
	<input type="text" value="Discussion Status"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="Open"/>	

Help with Searching

- Use the [Value Options](#) link to view standard lists and classifications; you can copy and paste Values from there.
- The required format for date entry is mm/dd/yyyy. If the date is not entered in this format, you will be required to re-enter the date in the specified format.
- You must enter at least one set of criteria in the Value box to execute a search. We recommend entering as much criteria as you know. The more refined the criteria, the quicker your results will be returned.
- If you combine AND and OR relations, use the parentheses to ensure the evaluations are carried out in the right order. If you do not use parentheses, or combine AND and OR within parentheses, the AND relationship is evaluated first.
- Selections are case-insensitive. You may enter any mixed case value.
- You can check for empty (no value) fields by selecting the "Unspecified" Selector.

[Enterprise View Menu](#)
[Editorial Menu](#)
[Production Tasks Menu](#)
[Production Status Grid](#)



Search Submissions in Enterprise View

- **Exceptions to the Value column displaying in the Enterprise View search**
 - “Publication Code”: Drop-down menu displays codes for all publications the user is authorized to access

Search submissions selection criteria

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#)

Search Definition:

[Help with Searching](#) [Insert Special Character](#) [Value Options](#) [Advanced Criteria](#)

(	Criterion	Is/Is not	Selector	Value)
<input type="button" value="v"/>	<input type="text" value="Publication Code"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="BBTest031QA170a"/>	<input type="button" value="v"/>
<input type="button" value="Add"/>					

Help with Searching

- Use the [Value Options](#) link to view standard lists and classifications; you can copy and paste Values from there.
- The required format for date entry is mm/dd/yyyy. If the date is not entered in this format, you will be required to re-enter the date in the specified format.
- You must enter at least one set of criteria in the Value box to execute a search. We recommend entering as much criteria as you know. The more refined the criteria, the quicker your results will be returned.
- If you combine AND and OR relations, use the parentheses to ensure the evaluations are carried out in the right order. If you do not use parentheses, or combine AND and OR within parentheses, the AND relationship is evaluated first.
- Selections are case-insensitive. You may enter any mixed case value.
- You can check for empty (no value) fields by selecting the "Unspecified" Selector.

[Enterprise View Menu](#)
[Editorial Menu](#)
[Production Tasks Menu](#)
[Production Status Grid](#)



Search Submissions in Enterprise View

- EV search definitions may be saved and displayed on a user's EV Menu
- The "Search Definition" drop-down list displays only EV search definitions

Search submissions selection criteria

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the [Advanced Criteria](#)

Search Definition: Choose Saved Search

[Remove Search Definition](#) [Edit Selected Search Definition](#) [Run Selected Search Definition](#)

[Help with Searching](#) [Insert Special Character](#) [Value Options](#) [Advanced Criteria](#)

	Criterion	Is/Is not	Selector	Value	
(<input type="text" value="Discussion Comments"/>	is	Contains	<input type="text"/>)
Add					

[Clear](#) [Search](#)

Help with Searching

- Use the [Value Options](#) link to view standard lists and classifications; you can copy and paste Values from there.
- The required format for date entry is mm/dd/yyyy. If the date is not entered in this format, you will be required to re-enter the date in the specified format.
- You must enter at least one set of criteria in the Value box to execute a search. We recommend entering as much criteria as you know. The more refined the criteria, the quicker your results will be returned.
- If you combine AND and OR relations, use the parentheses to ensure the evaluations are carried out in the right order. If you do not use parentheses, or combine AND and OR within parentheses, the AND relationship is evaluated first.
- Selections are case-insensitive. You may enter any mixed case value.
- You can check for empty (no value) fields by selecting the "Unspecified" Selector.



Search Submissions in Enterprise View

Search results page:

- Tools on the search results page (save, download results, etc.) are the same as those for single-publication searches
- Submissions on the home publication site display the same Action links as those displayed for single-publication searches
- Submissions on a different publication site display a "Go to Submission" link (see Slide 8)
- Results display a Publication Code to indicate the site where the submission was made

Search Submissions
(Manuscript Number is beginning with 'BBTEST031QA170A')
Show: Enterprise View

Publication Code	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Keywords	Classification	Corresponding Production Editor	Production Status	Schedule Group	Initial Date Submitted	Date Production Initiated	Submission Target Online Date	Section Category
bbtest031qa170a	BBTest031QA170 D-23-00474	Allan Author UNITED STATES	Journal_05252023_190752	Rapid Communicat							May 25 2023 9:38:41:913AM	May 25 2023 9:38:42:650AM		
bbtest031qa170a	BBTest031QA170 D-23-00473	Allan Author UNITED STATES	Here is the Title to verify.	Rapid Communicat							May 8 2023 1:53:22:350AM	May 8 2023 1:53:23:157AM		
bbtest031qa170a	BBTest031QA170 D-23-00472	Allan Author UNITED STATES	Journal_05052023_142551	Rapid Communicat							May 5 2023 4:56:49:060AM	May 5 2023 4:56:49:430AM		

Publication Code
bbtest031qa170a



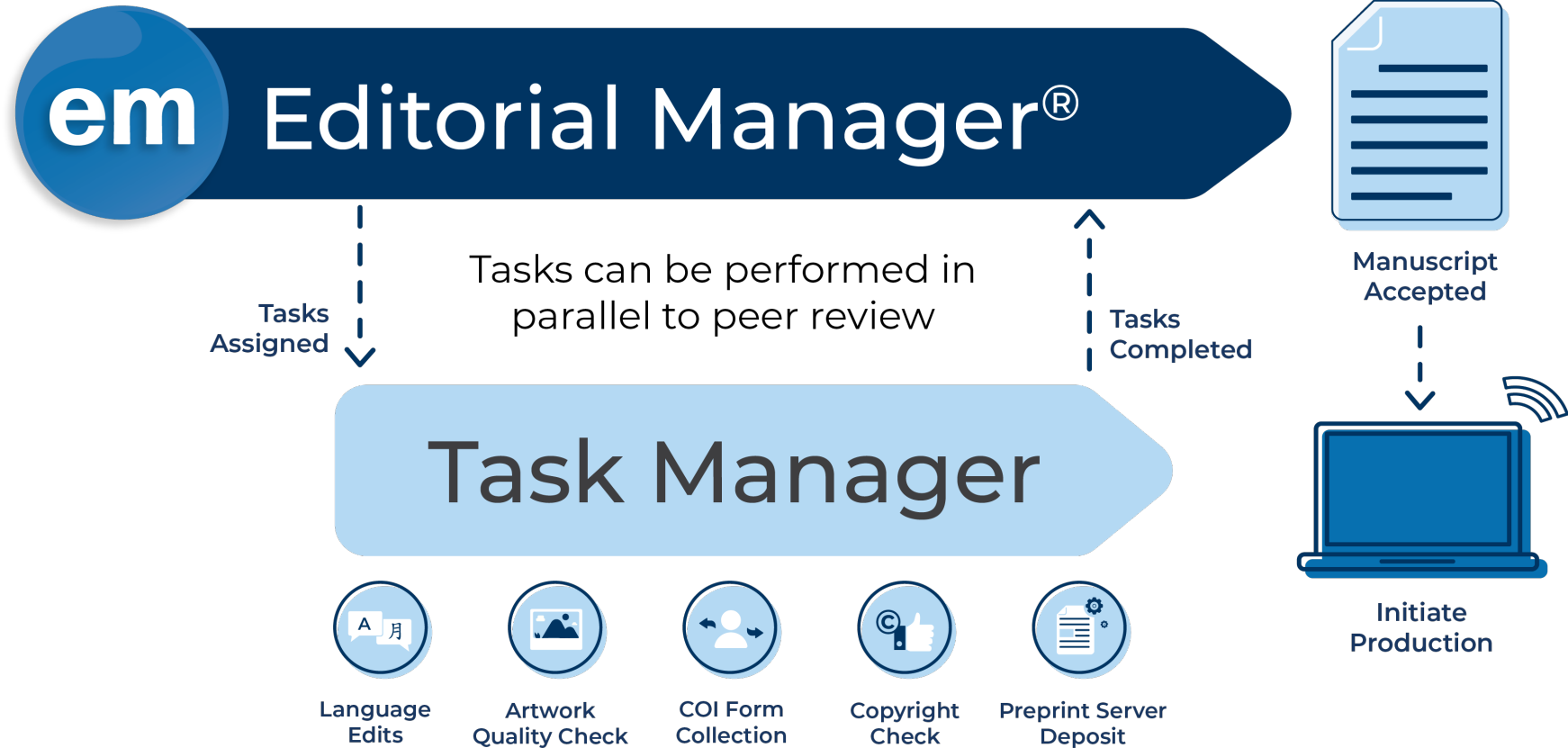


Task Manager

For Editorial Tasks

Task Manager: Overview

- Assign, complete, and track important editorial tasks prior to production
- At any time in the editorial workflow, without access to a production tracking system
- Tasks can be completed in parallel and can be assigned only as relevant



Task Manager: Use Case 1

Use Case

Deposit / Transfer Files and Metadata to Vendor

Example

- Transfer a submission to a Preprint Server
- Transfer a submission to a vendor/service for
 - Language Checking
 - Artwork Quality Checking
 - Copy Editing
 - Taxonomy or semantic enrichment service
 - External Archiving



Task Manager: Use Case 2

Use Case

Obtain Additional Information from Author

Example

- Obtain License / Agreement form from Author
 - Copyright License
 - Conflict of Interest disclosure form



Task Manager: Use Case 3

Use Case

Gradual Engagement

Example

- Authors submit a minimal requirement submission to expedite the submission process and reduce obstacles. If the journal decides to proceed with the submission, additional information may be collected from the Author to meet the publication's policy
 - Questionnaire
 - Request to provide additional files



Task Manager: Use Case 4

Use Case

Technical / Diligence Check

Example

- To accelerate the peer review, technical checks may be performed at a later stage in parallel to peer review
 - Figure quality check
 - Completion of information (ORCID etc.)



Task Manager: Production Task Questionnaire

- NEW: Ability to edit production task questionnaire responses on the Transmittal Form
 - Author and Submission Questionnaire responses can be edited on the Transmittal Form
 - The ability to edit Production Task Questionnaire responses on the Transmittal Form has been introduced
 - This enhancement adds the ability to edit Production Task Questionnaire responses on the Transmittal Form



Task Manager: Production Task Questionnaire

PolicyManager > Questionnaire Policies > Create Custom Questions

- Brings the behavior of Production Task Questionnaire responses into alignment with the behavior of Author and Submission Questionnaire responses
- Detail of Edit Custom Question page: Editable configuration for the Transmittal Form page now applies to custom questions in Production Task Questionnaires

Integration Options ⓘ

Include in Editorial Transmittal
 Include in Production Task Transmittal
 Transmit as Author Note/Footnote

Custom Metadata ID: ⓘ

[Select Custom Metadata ID](#)

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

<p>PDF Cover Page ⓘ</p> <p><input checked="" type="checkbox"/> Display</p>	<p>Manuscript Details</p> <p><input checked="" type="checkbox"/> Display Help Text: <input type="text"/></p>	<p>Transmittal Form ⓘ</p> <p><input checked="" type="checkbox"/> Display <input checked="" type="checkbox"/> Editable <input type="checkbox"/> Required Help Text: <input type="text"/></p>
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Task Manager

Submission
Workflows and
Production Tasks

Users can define their workflow tasks in PM:

- Create workflow tasks
- Add trigger tasks
- Add milestone tasks
- Reorder tasks



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Task Manager: Submission Workflows and Production Tasks

- PolicyManager > Configure Submission Workflows and Tasks
- Choose the desired workflow to edit, and arrive at the Configure Submission Workflow page to edit individual tasks, and view milestone tasks, trigger tasks, etc.


Configure Submission Workflow















This is a user-defined workflow, containing a set of tasks selected from those defined under the 'All Submission Production Tasks' workflow.

You may select additional tasks and add them into this workflow; the remove icon () removes the associated task from this workflow alone. The Task Order defined here applies to this workflow alone.

The [Edit] link modifies the master Task Type configuration, affecting all workflows. The edit icon () modifies Automatic Task Assignment settings affecting only this workflow (you must first configure the Task Type to allow Automatic Task Assignment when Trigger Tasks are submitted).

The 'Assign if First Task' setting will only apply to workflows used after Production has been initiated and will not apply if this workflow is set as the Task Manager Workflow for an Article Type.

Workflow Name: 

	Order	Task Type (◆=Milestone)	Assign if First Task 		Trigger Task(s) 	Allow Repeats 
	<input type="text" value="1"/>	Copy Editing [Edit]				
	<input type="text" value="2"/>	Request Artwork from Author [Edit]				
	<input type="text" value="3"/>	◆Milestone Task [Edit]				
	<input type="text" value="4"/>	Author CopyEdit [Edit]				
	<input type="text" value="5"/>	Final Copy Edit [Edit]				
	<input type="text" value="6"/>	Typesetting [Edit]				
	<input type="text" value="7"/>	Pagination Aries Proof with Math [Edit]			Copy Editing; Request Artwork from Author; Milestone Task	
	<input type="text" value="8"/>	Publisher Task [Edit]				
	<input type="text" value="9"/>	Format Manuscript [Edit]				



Task Manager: Scheduling and Due Date Options

- PolicyManager > Configure Schedule Group Production Tasks > Add/Edit Schedule Group Production Task
- Identify a task as a milestone task—no due date would be required
- Set due dates for each task based on assignment, online publication, and publication date

Scheduling and Due Date Options

Milestone Tasks do not require a response and automatically have the same start and end dates. Set the Task to be a Milestone if you do not wish to track the duration, or wish to simply log a key milestone. Otherwise you may enter one or more Due Date calculation methods, and the earliest possible date will be used when allocating a task.

Due Date:

Task is a Milestone Task (no due date required).

Calculate a Due Date based on:

Number of Days after Assignment Date:

3

Number of Days prior to Schedule Group Target Online Publication Date:

20

Number of Days prior to Schedule Group Target Publication Date:

25



Production Statuses & Milestone Tasks

- PolicyManager > Configure Production Statuses
- In the Workflow below, the Milestone Task is "Export Task AW"

Configure Submission Workflow

This is a user-defined workflow, containing a set of tasks selected from those defined under the 'All Submission Production Tasks' workflow.

You may select additional tasks and add them into this workflow; the remove icon (🗑️) removes the associated task from this workflow alone. The Task Order defined here applies to this workflow alone.

The [Edit] link modifies the master Task Type configuration, affecting all workflows. The edit icon (✍️) modifies Automatic Task Assignment settings affecting only this workflow (you must first configure the Task Type to allow Automatic Task Assignment when Trigger Tasks are submitted).

The 'Assign if First Task' setting will only apply to workflows used after Production has been initiated and will not apply if this workflow is set as the Task Manager Workflow for an Article Type.

🗑️	13	XML Edit (Revised Proof) [Edit]
🗑️	14	Simple process test [Edit]
🗑️	15	◆Export Task AW [Edit]
🗑️	16	Assign License [Edit]
🗑️	17	Transmittal [Edit]
🗑️	18	Generic Task [Edit]

Demo XML Workflow

Task Type (◆=Milestone)	Assign if First Task ⓘ	Trigger Task(s) ⓘ	Allow Repeats ⓘ
Simple XML Intake [Edit]			
XML Edit (copy edit) [Edit]		✍️ Simple XML Intake	
QA and Update [Edit]		✍️ XML Edit (copy edit)	
Prep for Typesetting [Edit]		✍️ QA and Update	
Auto-pagination (proof) [Edit]		✍️ Prep for Typesetting	
XML Edit (Proof Review1) [Edit]		✍️ Auto-pagination (proof)	
XML Edit (Proof Review) [Edit]		✍️ XML Edit (Proof Review1)	
Update Vol/Iss/DOI [Edit]		✍️ XML Edit (Proof Review)	
Export Deliverable XML [Edit]		✍️ Update Vol/Iss/DOI	
PMC Step 1 [Edit]		✍️ Export Deliverable XML	
PMC Step 2 [Edit]		✍️ PMC Step 1	
Crossref Deposit [Edit]		✍️ PMC Step 2	
XML Edit (Revised Proof) [Edit]		✍️ Crossref Deposit	✓
Simple process test [Edit]		✍️ XML Edit (Revised Proof)	
◆Export Task AW [Edit]			
Assign License [Edit]			
Transmittal [Edit]			
Generic Task [Edit]		✍️	



Production Statuses & Milestone Tasks

- PolicyManager > Configure Production Statuses
- Set the Status Rules based on what you want reflected on your Production Status Grid
- This Status tells us "Export Task AW" *has* started (value = true) but *has not* completed (value = false)

Edit Production Status

[Insert Special Character](#)

Production Status Name: Maximum Production Status Name is 100 characters

Hide When you **Hide** a custom Production Status, the Status term will no longer appear on Production Tracking pages.

Select "Record in History" to ensure the Production Status History lists the date when a submission enters this status. You should check that users are able to view the Production Status History by setting the correct permissions in RoleManager.

Record in History

Status Rules

Whenever an action relating to a production task is carried out, the system checks the rules related to each status. If the following criteria are true for the submission this status will be added or retained if already set; if the following criteria are false, then this status will not be added or will be removed if already set.

(	Criterion	Is/Is not	Selector	Value)	
	Export Task AW Started	is	Equal To	True	AND	<input type="button" value="Remove"/>
	Export Task AW Completed	is	Equal To	False		<input type="button" value="Remove"/>
						<input type="button" value="Add"/>



Task Manager: Dates in Production Status Grid

- Dates you set in Configure Schedule Group Production Tasks translate to the Production Status Grid (Shortcut menu)
- Which deadlines are coming up? Which dates slipped? Which dates were met?

Quicklinks

Production Status Grid

Show: All Submissions in Production

Page: 1 of 3 (203 total submissions)

Action	Manuscript Number	Author Name	Production Status	Production Notes	Printing	Copy Editing	Typesetting	Colour Imposition	Prep for Web	Format manuscript	Schedule Group	Article Type
History Transmittal Form Assign Production Task Change Schedule Group File Inventory Send E-mail Linked Submissions	23-10-TEST-401	Anne Author (UNITED KINGDOM)	With Copy-Editor; [Not Copy-Edited]; [Not Web Prepped]	No Production Notes have been entered. Edit	Must Start: Jul 15 2007 12:00AM Slip: 5799 days	Due Jun 16 2007 11:59PM Charlie Copy-Editor Slip: 5826 days	Must Start: Jun 13 2007 12:00AM Slip: 5831 days		Must Start: Jun 28 2007 12:00AM Slip: 5816 days	Due May 26 2007 11:59PM P. Rod Uction	7(5) testing another SG	Production Test
Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory Send E-mail Linked Submissions	JXYZ-60-DAN-Test-3	Anne Author (UNITED KINGDOM)	With Copy-Editor; [Not Copy-Edited]; [Not Web Prepped]	No Production Notes have been entered. Edit		Due Apr 25 2007 11:59PM Charlie Copy-Editor				Submitted Apr 20 2007 05:18AM John MacJohn	6(2) May 2007	Production Test
Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory Send E-mail Linked Submissions	23-10-Testing-1	Anne Author (UNITED KINGDOM)	With Copy-Editor; [Not Copy-Edited]; [Not Web Prepped]	No Production Notes have been entered. Edit	Must Start: Jul 10 2007 12:00AM Slip: 5804 days	Due Jun 18 2007 11:59PM Charlie Copy-Editor Slip: 5843 days	Must Start: Jun 01 2007 12:00AM Slip: 5843 days		Must Start: Jun 26 2007 12:00AM Slip: 5818 days	Due Jun 09 2007 11:59PM John MacJohn	7(1) Test 6.0-23-10 group.	Production Test
Production Details History Transmittal Form Assign Production Task Change Schedule Group File Inventory End Production Send E-mail	JXYZ-60-DAN-Test-4	Anne Author (UNITED KINGDOM)	Ready to Copy-Edit; [Not Copy-Edited]; [Not Web Prepped]	No Production Notes have been entered. Edit						Submitted May 17 2007 10:25AM John MacJohn	6(3) June 2007	Production Test

Printing	Copy Editing	Typesetting	Colour Imposition	Prep for Web
	Submitted Apr 27 2006 09:35AM Ellie Editor			
Must Start: Jan 26 2010 12:00AM Slip: 4873 days	Submitted Jun 27 2006 02:37PM Ellie Editor	Due May 18 2006 11:59PM Technical Typesetting Slip: 4918 days		Must Start: Dec 27 2009 12:00AM Slip: 4903 days
	Due May 18 2006 11:59PM Charlie Copy-Editor Slip: 4928 days			



Task Manager

FTP Options

- Configure Schedule Group Production Tasks > Add/Edit Schedule Group Production Task
- FTP values can be included in a task for importing/exporting submission content

FTP Options

Group Production Task Transmittal Method:

Allow task assignment and FTP without Assignment Files

Include Aries Import XML file in transmittal

Secure FTP Server address (e.g. sftp://ftp.ariessys.com[:21]):

Username:

Password:

Subdirectory:

E-mail Address (for transmittal notification):

Group Production Task Import Profile:

E-mail Address (for import error notification):

XML metadata file is required for import

Select Fields for Import





Companion Files

Beyond the Default

Setting Companion File Options

- PolicyManager > Configure Submission Workflows and Tasks
 - Click Edit on a Workflow to get to the Configure Submission Workflow page and then edit an individual task
 - Scroll to Companion File Options
- Limit the types of companion files that a user may upload when completing a task



Setting Companion File Options

- A scrolling table that shows the Submission Item Types configured as companion files enables the System Administrator to configure additional companion file options:
 - Limit the Submission Item Types that can be uploaded when task is submitted: If this box is checked, then the Allow Upload checkbox must be selected for at least one Item Type
 - Identifying File Extension: If file extensions are entered, they must contain 2 – 5 letters/numbers (no special characters)
 - Default: For tasks configured as Submission Production Task Import (in FTP Options), a Default Item Type must be selected

Companion File Options

- Show Warning if File not uploaded when Task is Submitted
- Allow assigned companion files to be replaced when submitting the task
- Limit the Submission Item Types that can be uploaded when Task is Submitted:
Use the table below to restrict the Item Types that can be uploaded when a task is submitted. You may also automatically apply Item Types based by entering file extensions (with or without periods), separated by spaces. If you select a Default Item type, it will be applied to all files except those with a special mapping defined. For Production Task Import Methods, XML Process Tasks, and XML Auto Pagination Tasks, you must select a Default Item Type.

Allow Upload	Default	Item Type	Identifying File Extension
	<input checked="" type="radio"/>	none	
<input checked="" type="checkbox"/>	<input type="radio"/>	(P) Formatted Text.	
<input type="checkbox"/>	<input type="radio"/>	(P) Copy-Edited text	
<input checked="" type="checkbox"/>	<input type="radio"/>	(P) Cleaned-up Art	
<input type="checkbox"/>	<input type="radio"/>	(P) Near-Final Art	



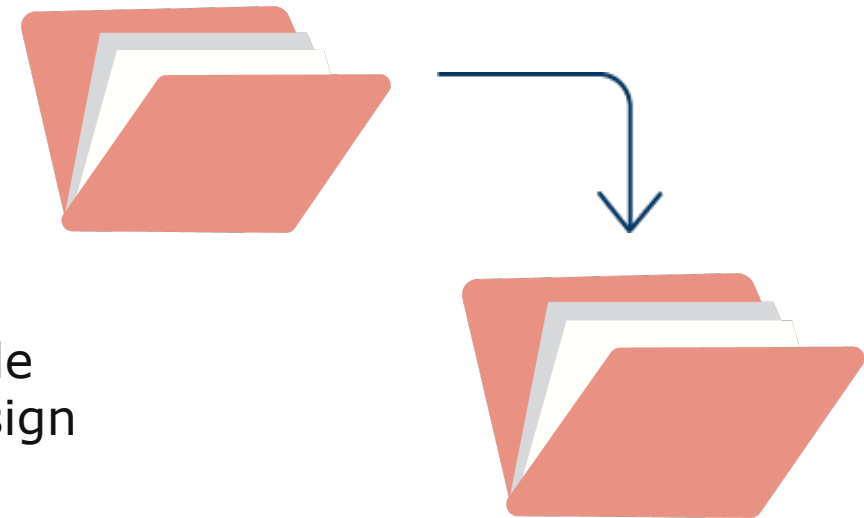
Setting Companion File Options

- Impact on the Upload Companion Files page:

- Any Item Types configured as allowed for upload appear in the Select Item Type drop-down list

- If any Item Types have been configured with identifying file extensions, the default setting of the drop-down list is Assign Automatically

- For automatic assignment, the system extracts the file extension of the uploaded file and attempts to match it to an Item Type's identifying file extension



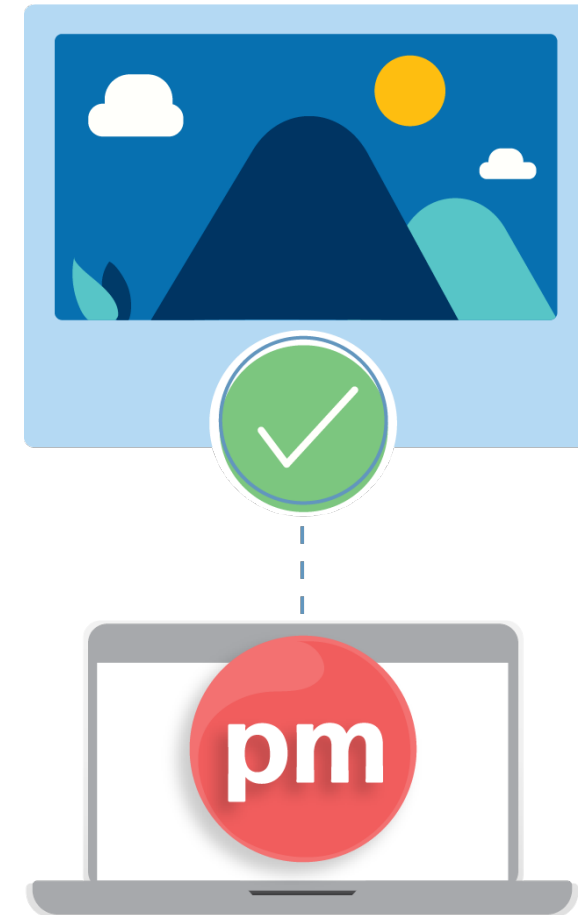


File Inventory and File References

Linking & Renaming

Preview for Uploaded Image Files

- A Define File References page is accessible from the File Inventory page
- Once a reference is entered in this field, it may be used to rename the file for download or transmittal
- PM users can preview:
 - Uploaded image files via the “File Inventory”
 - Link displays for Companion files and for Submission files
 - The link opens a pop-up window showing the image and associated metadata



Rename Files via Production Task Using File Reference

- A File Reference field on the “File Inventory” page allows publication staff to rename files for organization, download, and transmittal
- The File Reference field allows a new name to be applied to the downloaded or transmitted file while leaving the file’s original name (at upload) unchanged in the system
- Task types can be configured to rename files by default, using the File Reference field

File Inventory for Manuscript Number: JXYZ-D-21-00015
John M.P. MacJohn (UNITED KINGDOM): "Testing Renew notify_editor - 2: Title Edited by Editor"
[\(View Submission PDFs\)](#)

Listed below are the files included in the current version of the latest Revision of the submission. [\(more...\)](#)

[Download Selections as Zip File](#) [Similarity Check: Selected Files](#) [Similarity Check: Reviewer PDF](#) [Close](#)

Submission Files

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action	Item	Description <small>(Limit 256 characters)</small>	Item Family	File Name	File Reference	Size	Modified	QC	Display On TF
<input type="checkbox"/>	<input type="checkbox"/>	Download	Manuscript	Manuscript	Default	COPY-EDITED - PapillaryR1.doc		38.5 KB	21 Dec 2021		<input checked="" type="checkbox"/>

[Upload Companion Files](#)

[Download Selections as Zip File](#) **Define File Reference:** [Selected Files](#) | [Files with no Reference](#) | **In Family:** [Choose...](#) [Close](#)

Define File References for Manuscript Number JXYZ-D-21-00015
John M.P. MacJohn
"Testing Renew notify_editor - 2: Title Edited by Editor"

Define new values for File References below. Select the 'Auto' checkbox to generate a default value. [\(more...\)](#)

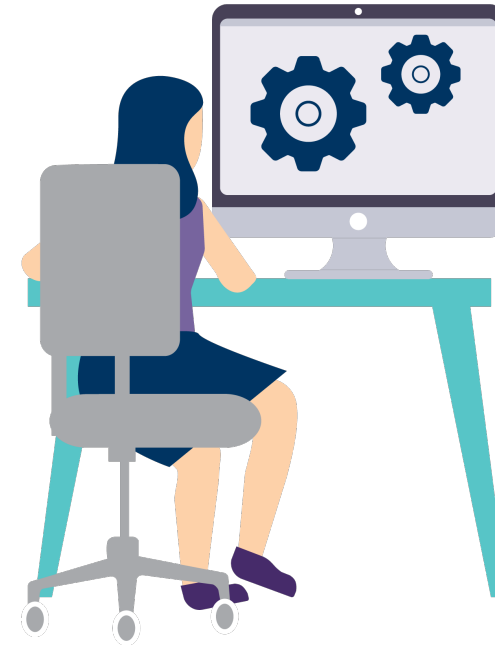
File Name	File Reference	Item Type	New File Reference	Use in XML
COPY-EDITED - PapillaryR1.doc		Manuscript	<input type="text"/>	<input checked="" type="checkbox"/>

[Cancel](#) [Submit](#)



Rename Files via Production Task Using File Reference

- A checkbox on the production task configuration page allows users to create and automatically apply new file names based on defined File Reference values
 - When this setting is enabled, the system will automatically rename any assignment files included in the ZIP file created for transmittal by SFTP



Rename Files via Production Task Using File Reference

- New names will be applied automatically to assignment files when they are downloaded by the task assignee unless the assignee has the new "RoleManager" permission related to renaming files
- Users with the new "RoleManager" permission will be asked if they want to rename the files or to override the automatic renaming





LiXuid Manuscript

*Unlock a Limitless
Production Experience*

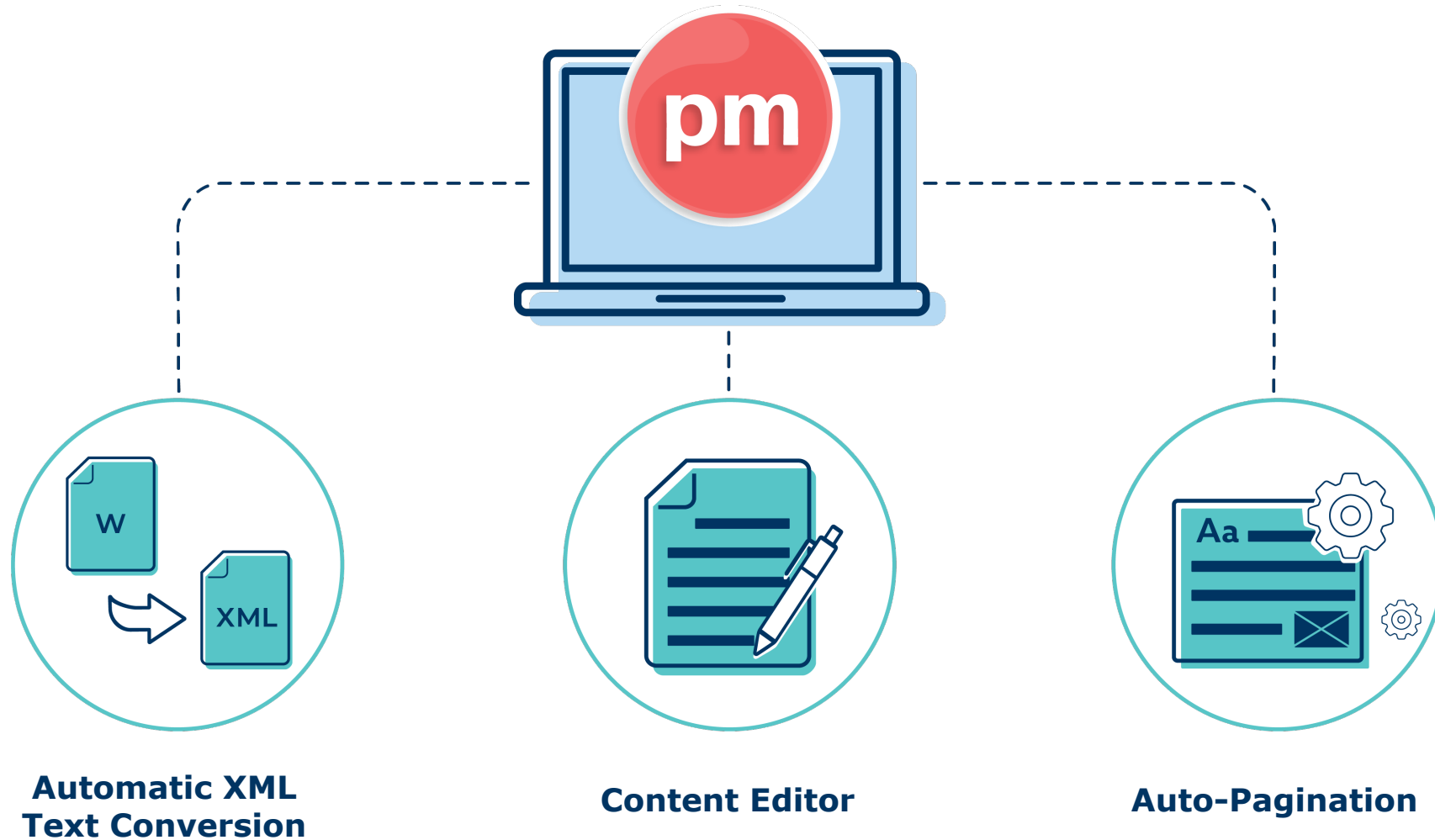
LiXuid Manuscript: Bridging the Gaps

LiXuid Manuscript is a PM feature:

- Suite of tools to streamline production workflow
- Transforms unstructured, static content (Word doc, PDF) into structured, dynamic data
- Makes content more machine-readable and accessible
- Powered by Aries' workflow management solutions
- Leverages XML technology behind-the-scenes (no user XML expertise required!)

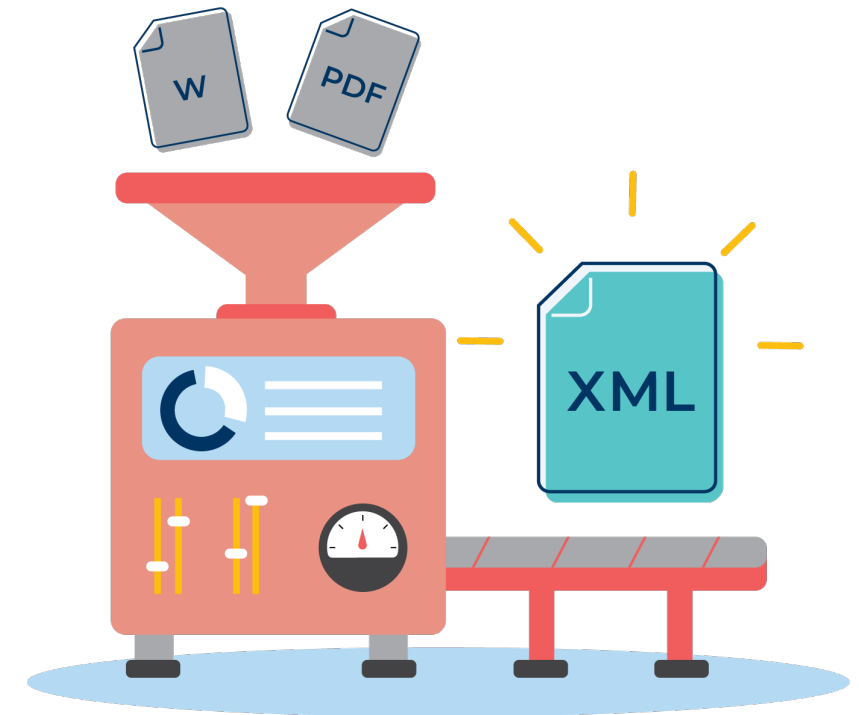


LiXuid Manuscript Production Toolset



Auto-Text Conversion

- Automatic transformation of content: unstructured (Word/PDF) to structured (XML)
- Industry-compliant Aries JATS XML
- Triggered via production task
- Transmittal XML metadata carries over from editorial



Content Editing Interface

- User-friendly, Word processor-like environment
- Journal-style agnostic, Highly-configurable
- Visible change/edit tracking
- Alerts inconsistencies and required corrections
- Enter and answer direct Author/Editor queries
- Automatically validates underlying XML in real time



Auto-pagination

- Automatically paginates articles in journal's print style from XML and finished graphics
- Customizable templates
- Triggered by a production task
- Packages the PDF, InDesign file, fonts, and graphics into a zip file for delivery to printers





Reporting in ProduXion Manager

*Analytics for data-driven
production decisions*

Reporting in PM

Demonstration

Demonstration of:

- Schedule group data/reporting
- Production task for reports



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Looking Ahead

Current development and ideation

Looking Ahead

- Automatically trigger a production task based on the response to a production task question

Custom Question



Resources

- EMHelp Articles
- EM/PM Release Notes
- PM Tutorial Documentation (beginners)
- Aries Video Library
- Aries Blog/Newsletter
- Your Account Coordinator!





Questions?

Thank you!

Stay Connected

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