



*Welcome to*  
**PMUG 2016**

 Editorial Manager®  ProduXion Manager®

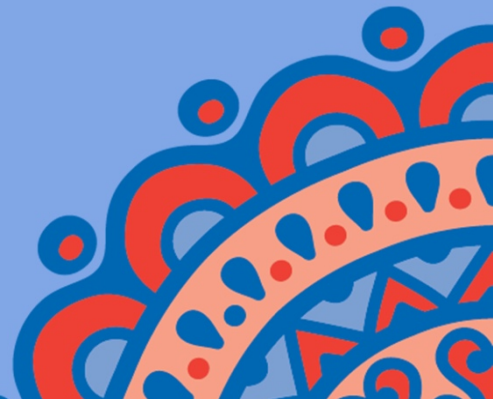
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<http://bit.ly/1thLars>

# ProduXion Manager

Features and enhancements



# Agenda

1. Workflow Automation
2. Production Status Grid
3. User-Defined Production Statuses
4. Issue Makeup, Planning, Publication

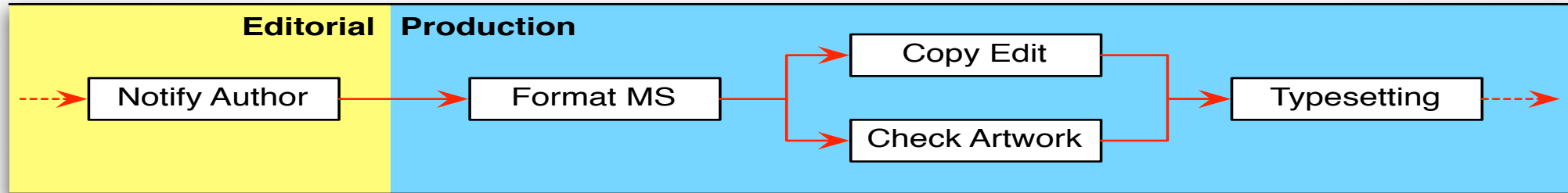
# 1: Workflow Automation

Streamlining task assignment/completion

# Overview

- Automatic Task Assignment (for Submission tasks)
  - When Production is Initiated
  - When selected tasks are completed (Multiple tasks)
  - Workflow-specific
- End Production when key task is Submitted
  - Submission task, all workflows
- FTP submission automates Submit Task step
  - And so, next submission task can be automatically triggered by suppliers
- Automation imposes some restrictions on configuration:
  - Single assignor and assignee
  - FTP Submission allows a single Companion Type

# Automating Assignment



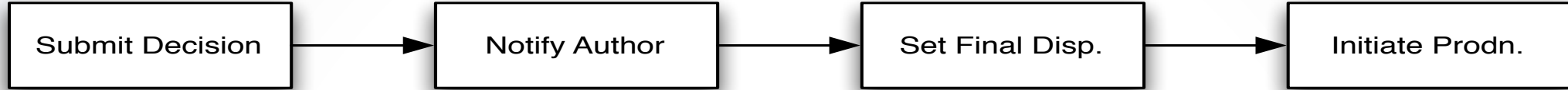
Workflow Name:  ✎

	Order	Task Type (◆=Milestone)	Assign if First Task ⓘ		Trigger Task(s) ⓘ	Allow Repeats ⓘ
🗑	<input type="text" value="1"/>	Format manuscript <a href="#">[Edit]</a>	✓			
🗑	<input type="text" value="2"/>	Copy Editing <a href="#">[Edit]</a>		✎	Format manuscript	
🗑	<input type="text" value="3"/>	Check Artwork <a href="#">[Edit]</a>		✎	Format manuscript	
🗑	<input type="text" value="4"/>	Typesetting <a href="#">[Edit]</a>		✎	Copy Editing; Check Artwork	
🗑	<input type="text" value="5"/>	Proof checking by Author <a href="#">[Edit]</a>				
🗑	<input type="text" value="6"/>	Prep for Web <a href="#">[Edit]</a>				

▲  
 ▢  
 ▼  
 ▼

[+ Add Selection\(s\) to Workflow](#)

## • Can Automate Production Initiation



Configure Accept FD ... to Initiate Production

Configure Notification... to Set Accept FD ... to Initiate Production

### Configure Automatic Production Initiation

Set/Check the 'Initiate Production upon Setting Final Disposition' production when the final disposition on a submission is set to 'A'

[...]

Regular Submissions:	<input checked="" type="checkbox"/> Initiate Production upon Setting
	<input checked="" type="checkbox"/> Initiate Production upon Setting
Conference Submissions:	<input checked="" type="checkbox"/> Initiate Production upon Setting

Cancel Submit

### Edit Article Type

Cancel Submit

Article Type: Rapid communication

Maximum Article Type name is 75 characters.

Warning: changing the Article Type name will apply the name change to all submissions of this type, previously submitted manuscripts/submissions.

Family: Regular Editor Use Only:

Hide When you Hide an Article Type, the Article Type will be deactivated (not available for new manuscripts)

[...]

#### Production Tracking Parameters:

Use Submission Workflow:

Short Branching Workflow

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

Accept as is

Submission Item Parameters:

## Edit Submission Production Task

Cancel

Submit

[Insert Special Character](#)

New Production Task Name:

Format manuscript

*Maximum Production Task Name is 100 characters*

- Hide** When you **Hide** a Production Task Name, the Production Task Name will be deactivated (not available for assignment).


### Assignment Options



Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

Automating First Task Assignment

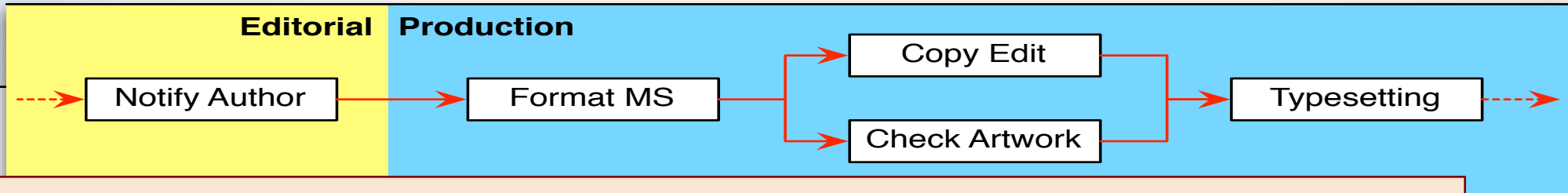
- Assign Automatically when Production is initiated (if this is the first task in the workflow)
- Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)

Automatic End Production when the Task is Completed and there are No Other Open

Workflow Name: Short Workflow 

	Order	Task Type (◀=Milestone)	Assign if First Task	Trigger Task(s)	Allow Repeats
	1	Format manuscript <a href="#">[Edit]</a>	<input checked="" type="checkbox"/>		
	2	Copy Editing <a href="#">[Edit]</a>		//	Format manuscript





• Can Automate remaining Task Assignments

Insert Special Character

New Production Task Name:

Maximum Production Task Name is 100 characters

**Hide** When you **Hide** a Production Task Name, the Production Task Name will be deactivated (not available for assignment).

**Assignment Options**

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

Assign Automatically when Production is initiated (if this is the first task in the workflow)

Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)

Automatic End Production when the Task is Completed and there are No Other Open

		Check Artwork [Edit]			Format manuscript
	4	Typesetting [Edit]			<div style="border: 1px solid red; padding: 2px;">             Format manuscript              Copy Editing              Check Artwork           </div>

Only roles with the "Assign Production Task" permission appear in this list. You may select multiple roles or de-select a role by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). If the task is configured for Automatic Assignment, you must select a single person who will be the sender for all tasks assigned automatically.

**Can be Assigned by:**

- Art Group Editor (E)
- Copy Editor (E)
- Editorial Office
- New test Prod Ed
- Production Controller
- Test editor role
- Typesetter (E)

- Arnolde Author-Three, Editorial Office
- Language Editor, Editorial Office
- John MacJohn, Editorial Office

**Can be Assigned to:**

- Corresponding Author only
- Selected Editor/Publisher Roles only

Only roles with the "Receive Production Task" permission appear in this list. You may select multiple roles or de-select a role by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). If the task is configured for Automatic Assignment, you must select a single person to be the recipient of all such tasks assigned automatically.

- Editorial Office
- Issue Controller
- New test Prod Ed
- Printer
- Production Controller
- Test editor role
- Typesetter (E)

- Technical Typesetting, Typesetter (E)
- Glaswegian Printer, Printer

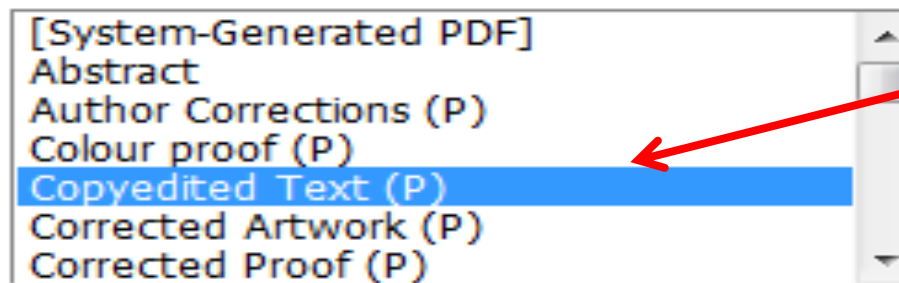
Automating Tasks requires a single Assignor and Assignee...

If 'Automatically Select Files for Assignment' is enabled, files in the submission File

If 'Automatically Select Files for Assignment' is enabled, files in the submission File Inventory that match the configured File Types will appear pre-selected for manual task assignment or will be automatically included when a task is assigned automatically.

Automatically Select Files for Assignment

Configure the Item Types for automatic selection. You may select multiple Item Types or de-select an Item Type by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). Important Note: if the task is an FTP task requiring a File on assignment, and the Task is configured to be Assigned Automatically, you must select an item here for the task to ever be assigned.



...and selection of a Companion File Type to be assigned automatically.

Follow-on Task Assignments allow the selected editors/publishers who complete this kind of task to immediately assign another task. Remember to configure the **Can be**

# Submit Task Automation

- Have vendors FTP files to complete tasks
- And update metadata (via FTP'ed XML file) when they do so

**FTP Options**

**Submission Production Task Transmittal Method:** JATS 1.1A Production Task Export

Allow task assignment and FTP without Assignment Files

Include Aries Import XML file in transmittal

FTP task without go.xml file

Use Manuscript Number for file names

FTP Server address (e.g. ftp.ariessys.com):

Username:

Password:

Subdirectory:

E-mail Address (for transmittal notification): cwebber@ariessys.com

**Submission Production Task Import Profile:** Aries Import

E-mail Address (for import notification):

XML file is required

[Select Fields for Import](#)

**Select Fields For Import**

The fields to be imported for this production task. Identifying information is designated with a check mark and cannot be hidden during import.

Fields will also be written to the Aries Import XML file sent in production task transmittal, if the checkbox "Include Aries Import XML file in the transmittal" is selected on the Production Configuration page.

[Expand All](#) [Collapse All](#)

**Importing Information:**

**Manuscript Information:**

**Original Manuscript Details**

**Page Group TOC Information**

Target Table of Contents Position

Target Start Page

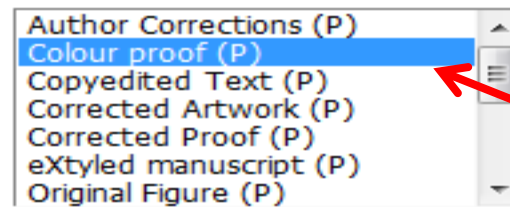
Target End Page

Target Number of Pages

# Submit Task Automation

## 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:  
Only Item Types configured as Companion files appear in this list. You may select multiple Item Types or de-select an Item Type by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). Important Note: if this task is configured with a Production Task Import Method, one and only one Item Type may be selected from this list. Companion files submitted via FTP for this kind of task will automatically be assigned this Item Type.



FTP Submission requires all files expected to be 'reverse fed' by vendor be given the same Companion File Type. (The files uploaded by the vendor can then be automatically carried forward into the next automatically assigned task as Assignment Files).

# Submit Task Automation

- If there are no more tasks in the workflow, Submitting a Task (manually or via FTP) can End Production Automatically on a Submission

Automatic End Production when the Task is Completed and there are No Other Open Tasks in the Workflow.

End Production Automatically after this task is Completed

# Submit Task – Recent Enhancement

Production Task Questionnaire

# Production Task Questionnaire

- User submitting Submission Production Task answers questions on “Submit Task” page (manual task submission only)

Cancel Upload File Submit Production Task

Consent for Preprint?

No

Responsible for Page Charges?

No

What kind of fish would u be | [Instructions](#)

Big - Big

Small - Small

Not Sure - Not Sure

Why would I want to be a fish -  
Why would I want to be a fish



# Production Task Questionnaire

- Configuration: Configure Submission Production Task Page – “Use Custom Questionnaire”

The image shows a configuration interface for a 'Submission Production Task Tra'. It features several sections: 'Questionnaire Options', 'FTP Options', and 'Submission Production Task Tra'. A dropdown menu is open for the 'Use Custom Questionnaire' field, displaying a list of options: 'None', 'None', 'Author Questionnaire', 'Betsy's Questionnaire', 'Revision 1 questionnaire', and 'Production Task Questionnaire'. The 'Production Task Questionnaire' option is highlighted in blue. Other partially visible options include 'Expo' and 'low t'. A checkbox labeled 'Include' is also visible at the bottom right of the form area.

## 2: Production Status Grid

Viewing Submission Progress

# Overview

- Lists Submissions and Submission Production Tasks
  - Schedule Group selectable as a filter
  - Tasks can be configured to display on grid (or not)
- Intended to be \*the\* central view of workflow progress
  - 'Spreadsheet' or T-Card-like
- Fully customizable layout – “power grid”
  - Columns are draggable/resizable/can be “fixed” for scrolling/can be hidden

Grand Totals			
	Number of Pages	Black and White Image Count	Color Image Count
Budget	124	60	12
Current	4	10	5

Quicklinks

?

Σ

### Production Status Grid

Show: Assigned Submissions

Page: 1 of 1 (81 total submissions)

1

100 results per page. ⚙️

Action	Manuscript Number	DOI	Author Name	Article Title	Production Status	Date Production Started	Submission Target Online Date	Format Manuscript	Request Artwork	Copy-Editing	Typesetting	Publisher Tasks	Colour Imposition
<a href="#">Action Links</a>	testtest		Jerry Callahan PhD (person removed from system)	testtest	New in Production; With Copy-Editor; Ready for Typesetter	10/26/2010 10:39:04	10/31/2010 00:00:00	Must Start: Oct 21 2010 12:00:00:000AM Slip: 2055 days		Must Start: May 13 2012 12:00:00:000AM Slip: 1485 days			
<a href="#">Action Links</a>	AmyTest-73-10-1		Six T. Reviewer	6.0-45 Test for Manager									
<a href="#">Action Links</a>	AmyTest-60-07-42	Amytest72/AmyTest-60-07-42.1	Amy Amy (person removed from system)	Testing Proxy bu									
<a href="#">Action Links</a>	AmyTest-60-07-43		Bill T. Burke MD	MOre Image Tes									
<a href="#">Action Links</a>	AmyTest-81-10-138		Stacey Middle Lavelle PhD, MD	fsd	Drawn					Slip: 1420 days			
<a href="#">Action Links</a>									Due Jul 06 2012 12:00:00:000AM Stacey Middle Lavelle				

#### Grid Options

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

Column Header	Fixed	Show
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manuscript Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Author Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Production Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Printing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Copy Editing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Typesetting	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Colour Imposition	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# 3: User-Defined Production Statuses

Track progress through workflow

# Overview

- Submission-Specific
- ALL statuses re-evaluated and term rebuilt whenever any task is assigned/cancelled/submitted
- 'Jigsaw' or composite term – you build up mini-terms, system applies all that match current set of assigned states.
- Intended to be flexible.
- Assess 'ever been assigned'/'Is in Progress'/'Has ever been completed' states in Task History
- Searchable in "Search Submissions"; search can be saved as "Quick Search"
- Displayed on Production Status Grid in 'Production Status' column

# Configure Production Statuses

- ‘Started’ really means ‘Has Ever Been Started’
- Example: a ‘New in Production’ custom status
  - Check is that no Task of *any* Type has *ever* been started:

**Edit Production Status**

[Insert Special Character](#)

Production Status Name:

(	Criterion	Is/Is not	Selector	Value	)	
▼	Format Manuscript Started	is ▼	Equal To ▼	False ▼	▼	AND ▼ <input type="button" value="Remove"/>
▼	Copy-Editing Started	is ▼	Equal To ▼	False ▼	▼	AND ▼ <input type="button" value="Remove"/>
▼	Typsetting Started	is ▼	Equal To ▼	False ▼	▼	AND ▼ <input type="button" value="Remove"/>
▼	Author Proofing Started	is ▼	Equal To ▼	False ▼	▼	AND ▼ <input type="button" value="Remove"/>
▼	Typeset Corrections Started	is ▼	Equal To ▼	False ▼	▼	AND ▼ <input type="button" value="Remove"/>
▼	Printing Started	is ▼	Equal To ▼	False ▼	▼	<input type="button" value="Remove"/>
						<input type="button" value="Add"/>

- ‘In Progress’ criterion = currently in Progress
  - Example: Copy-Editing in Progress = custom term “With Copy Editor”

**Edit Production Status**

[Insert Special Character](#)

**Production Status Name:**

*Maximum Production Status Name is 100 characters*

**Status**

Whenever 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	)
▼	Copy-Editing In Progress ▼	is ▼	Equal To ▼	True ▼	▼



- Ex: 'Awaiting Action' when no task is in progress

## Edit Production Status

Cancel

Submit

[Insert Special Character](#)

Production Status Name:

*Maximum Production Status Name is 100 characters*

(	Criterion	Is/Is not	Selector	Value	)		
<input type="checkbox"/>	Format MS In Progress	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Copy-Editing In Progress	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Typesetting In Progress	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Author Proofing In Progress	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Typeset Corrections In Progress	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Printing In Progress	is	Equal To	False			Remove
							Add

Cancel

Submit

- Example: a 'Ready for First Proof' custom status
  - Check: that previous task 'Typesetting' has been completed at least once;
  - and that the next task 'Author Proofing' and all subsequent tasks have never been started

Production Status Name:

*Maximum Production Status Name is 100 characters*

(	Criterion	Is/Is not	Selector	Value	)		
<input type="checkbox"/>	Typesetting Completed	is	Equal To	True	<input type="checkbox"/>	AND	Remove
<input type="checkbox"/>	Author Proofing Started	is	Equal To	False	<input type="checkbox"/>	AND	Remove
<input type="checkbox"/>	Typeset Corrections Started	is	Equal To	False	<input type="checkbox"/>	AND	Remove
<input type="checkbox"/>	Printing Started	is	Equal To	False	<input type="checkbox"/>		Remove
							Add

# 4: Issue Make-up, planning, pagination

Planning publication

# Overview

- Schedule Group TOC = “Issue TOC”
- Can contain:
  - Section Headers
  - Submissions. Added on initiating production, by editing TOC, or by assigning submission to SG
- Pagination typed in
  - Alternatively page numbers can be supplied by Typesetter vendor by submitting XML to close Task

# Schedule Group TOC

<b>Target Number of Submissions:</b>	12
<b>Page Budget:</b>	128
<b>Black and White Image Budget:</b>	48
<b>Color Image Budget:</b>	

[Expand All/Collapse All Additional Manuscript Details](#)
[Download Table of Contents](#)
[Download Table of Contents in UTF-8 Format](#)

## 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	Article Title	Section/Category	Submission Target Online Date	Submission Actual Online Date	Black and White Image Count	Color Image Count
<a href="#">Production Details</a> ▾ <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	1	testy-15	Rapid communication	John M MacJohn	12	1	12		Testing review merge codes.		30 Jun 2014		12	0
<a href="#">+ Additional Manuscript Details</a>														
<a href="#">Production Details</a> ▾ <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	2	Test-Dec14-0001	Original Article	Anne A. Author	0	0	0	Production Started	Sample submission for IJCR				0	0
<a href="#">+ Additional Manuscript Details</a>														
<a href="#">Remove Header</a> <a href="#">Edit Header</a>	3		Letters to the Editor		0									
<a href="#">Production Details</a> ▾ <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	4		Letter to the Editor	John M MacJohn	0	0	0	Being Copy-Edited	Test paper 5 for ESIS 2.1 demo				0	0
<a href="#">+ Additional Manuscript Details</a>														

- Additional MS Details can be configured to display on Schedule Group TOC, either as “read-only” or editable

Table of Contents																															
Actions	Target TOC Position	Manuscript Number	Article Type	Editor Originating Proposal	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Section/Category	Submission Target Online Date	Black and White Image Count	Color Image Count																
<a href="#">Production Details</a> ▾ <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	1	CAROLINETEST40-D-05-00026	Original Research		Duncan James Webber, MD	0	0	0	Custom Status -copy edit started	10.1234/CAROLINETEST82.2011.21	Invite a bunch of reviewers for bug 12513		Dec 15 2006 12:00AM	0	0																
<a href="#">Additional Manuscript Details</a>		<table border="1"> <thead> <tr> <th>Description</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>AMD - Additional Notes</td> <td><input type="text"/> <a href="#">Help</a></td> </tr> <tr> <td>Page Charges</td> <td>No ▾</td> </tr> <tr> <td>AMD - New Test Field - List 1</td> <td><input type="text"/> <a href="#">Help</a></td> </tr> <tr> <td>AMD - New Test Field - Date</td> <td><input type="text"/> <a href="#">Help</a></td> </tr> <tr> <td>Transmitted Article Type</td> <td>research-article ▾</td> </tr> <tr> <td>AMD #2 to appear on SG TOC</td> <td>this is my default value</td> </tr> <tr> <td>AMD #1 to appear on SGTOC</td> <td>Default Value</td> </tr> </tbody> </table>														Description	Value	AMD - Additional Notes	<input type="text"/> <a href="#">Help</a>	Page Charges	No ▾	AMD - New Test Field - List 1	<input type="text"/> <a href="#">Help</a>	AMD - New Test Field - Date	<input type="text"/> <a href="#">Help</a>	Transmitted Article Type	research-article ▾	AMD #2 to appear on SG TOC	this is my default value	AMD #1 to appear on SGTOC	Default Value
Description	Value																														
AMD - Additional Notes	<input type="text"/> <a href="#">Help</a>																														
Page Charges	No ▾																														
AMD - New Test Field - List 1	<input type="text"/> <a href="#">Help</a>																														
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<a href="#">Production Details</a> ▾ <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a>	2	CAROLINETEST50-D-06-00010	Original Research		Duncan James Webber, MD	0	0	0			Contains a zip file	Main Section	Dec 31 2008 12:00AM	0	0																
<a href="#">Additional Manuscript Details</a>		<table border="1"> <thead> <tr> <th>Description</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>AMD - Additional Notes</td> <td><input type="text"/> <a href="#">Help</a></td> </tr> <tr> <td>Page Charges</td> <td>No ▾</td> </tr> <tr> <td>AMD - New Test Field - List 1</td> <td><input type="text"/> <a href="#">Help</a></td> </tr> <tr> <td>AMD - New Test Field - Date</td> <td><input type="text"/> <a href="#">Help</a></td> </tr> <tr> <td>Transmitted Article Type</td> <td>research-article ▾</td> </tr> <tr> <td>AMD #2 to appear on SG TOC</td> <td>this is my default value</td> </tr> </tbody> </table>														Description	Value	AMD - Additional Notes	<input type="text"/> <a href="#">Help</a>	Page Charges	No ▾	AMD - New Test Field - List 1	<input type="text"/> <a href="#">Help</a>	AMD - New Test Field - Date	<input type="text"/> <a href="#">Help</a>	Transmitted Article Type	research-article ▾	AMD #2 to appear on SG TOC	this is my default value		
Description	Value																														
AMD - Additional Notes	<input type="text"/> <a href="#">Help</a>																														
Page Charges	No ▾																														
AMD - New Test Field - List 1	<input type="text"/> <a href="#">Help</a>																														
AMD - New Test Field - Date	<input type="text"/> <a href="#">Help</a>																														
Transmitted Article Type	research-article ▾																														
AMD #2 to appear on SG TOC	this is my default value																														

- Budgets tracked; budgeted/totals shown
  - Manage Schedule Groups folder
  - Production Status Grid
- Submissions can belong to multiple SGs

### Manage Schedule Groups

Page: 1 of 1 (9 total Schedule Groups)

Display  results per page.

<a href="#">+ Action</a>	<a href="#">Schedule Group</a>	<a href="#">Target Number of Submissions</a>	<a href="#">Current Number of Submissions</a>	<a href="#">Page Budget</a>	<a href="#">Current Page Total</a>	<a href="#">Target Publication Date</a>	<a href="#">Target Publication Volume</a>	<a href="#">Year</a>	<a href="#">Target Publication Issue</a>	<a href="#">Target Online Date</a>	<a href="#">Black and White Image Budget</a>	<a href="#">Color Image Budget</a>	<a href="#">Current Black and White Image Total</a>	<a href="#">Current Color Image Total</a>
<a href="#">Action Links</a>	1(1-2) - Inaugural Double Issue	12	5	126	140	31 Jan 2013	1		1-2		20	12	10	7
<a href="#">Action Links</a>	1(3) - Mar 2013 Issue	12	0	196	0	01 Mar 2013	1		3		48	12	0	0
<a href="#">Action Links</a>	Another test of SG Addition	19	3	0	13		99		9		0	0	5	3
<a href="#">Action Links</a>	Copied SG	0	0	0	0						0	0	0	0
<a href="#">Action Links</a>	My Testing to 10-63	0	1	0	14						0	0	0	0
<a href="#">Action Links</a>	test 2 for Publisher X	0	1	0	0		3		2		0	0	12	0
<a href="#">Action Links</a>	Test for Publisher X	0	0	0	0		3		1		0	0	0	0
<a href="#">Action Links</a>	Test Schedule Group AdditionB	999	4	99	49		21		1		99	9	18	2
<a href="#">Action Links</a>	Dec 2014 - 22(4)	12	3	128	12	31 Dec 2014	22	2014	4	01 Dec 2014	48	0	12	0

Page: 1 of 1 (9 total Schedule Groups)

Display  results per page.

[Add Schedule Group](#)

# 13.0 Enhancements

- Proposals can be assigned to Schedule Groups from Editorial Side; appear as TOC headers and in new 'Pre-selected Submissions grid' on Edit Group Details/Schedule Group Details pages.
- Act as kind of 'section' containing related submissions.
  - Invited submissions will be added to group and visible in Pre-selected Submissions grid when in Editorial
  - Invited Submissions move automatically into Schedule Group TOC proper when production is initiated on them.



# Pre-assign Proposal and invited submissions to Schedule Group

## Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Editor Originating Proposal	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	DOI	Article Title	Black and White Image Count	Color Image Count
<a href="#">Details</a> ▾ <a href="#">Remove Header</a>	1	CAROLINEDEV130-D-16-00019	Issue Proposal - EMUG 2016	Ed J Editor		0					This is my Issue Proposal for EMUG 2016		0
<a href="#">Production Details</a> ▾ <a href="#">Transmittal Form</a> <a href="#">Remove from Group</a> <a href="#">Linked Submissions</a> <a href="#">Additional Manuscript Details</a>	2	CAROLINEDEV130-D-16-00020	Perspective		Sharon Webster, MD	0	0	0	Custom Status -copy edit started	10.11260150031	This is my invited submission for a proposal	0	0

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

## Pre-selected Submissions

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Editor Originating Proposal	Author Name	Target Number of Pages	Editorial Status	DOI	Black and White Image Count	Color Image Count	Submission Target Online Date	Submission Actual Online Date
<a href="#">Details</a> ▾ <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a>	1	CAROLINEDEV130-D-16-00019	Issue Proposal - EMUG 2016	This is my Issue Proposal for EMUG 2016	Ed J Editor		0	Authors Invited for Proposal			0		
		CAROLINEDEV130-D-16-00021	Perspective	Caroline's invited submission		Caroline Webber	0	Submitted to Journal		0	0		

[Submit](#) [Cancel](#) [Add Submissions](#)

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

Pre-selected Submissions Grid

**Pre-selected Submissions**

Actions	Target TOC Position	Manuscript Number	Article Type	Article Title	Editor Originating Proposal	Author Name	Target Number of Pages	Editorial Status	DOI	Black and White Image Count	Color Image Count	Submission Target Online Date	Submission Actual Online Date
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		CAROLINEDEV130-D-16-00021	Perspective	Caroline's invited submission		Caroline Webber	0	Submitted to Journal		0	0		

[Submit](#) [Cancel](#) [Add Submissions](#)

# 13.0 Enhancements, cont'd

- APC processing – “Payment Due” can now be triggered by Production Task

# Trigger APC API – Payment Due in ProduXion Manager

## Configure APC Processing

Select an **Editorial** Event to Trigger the **Publication Charges Payment Due Event**

Notify Author of selected decision(s):

Please select Decision Term(s)  
Accept  
Revise  
Revise, No Review

Set the Final Disposition to 'Accept', 'Accept and Transmit' or 'Accept for Extraction'

**None (Publication Charges Payment Due must be triggered by assigning a Submission Production Task)**

NOTE: If an Editorial event IS selected to trigger the initial call, subsequent Payment Due calls MAY be triggered as Submission Production Tasks.

# Trigger APC API – Payment Due in ProduXion Manager

## Edit Submission Production Task

[Insert Special Character](#)

New Production Task Name:

*Maximum Production Task Name is 100 characters*

- Hide** When you **Hide** a Production Task Name, the Production Task Name will be deactivated (not available for assignment).

### Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assigner and a specific user to receive the task. You should also configure

*Part of page omitted*

Production Task Assignment can be configured to also trigger a Publication Charges Payment Due letter and associated status change; this may be in addition to the initial trigger that occurs when the Author is notified of a selected decision or when the Final Disposition is set to Accept.

- Trigger 'Publication Charges Payment Due'

Letter Options:

Trigger all ActionManager 'Publication Charges Payment Requested' letters

Send following letter to the Corresponding Author only

Do not trigger if APC Status is already 'In Process' or 'Complete'

Do not trigger on repeated assignment of this Task

# Trigger APC API – Payment Due in Production Manager

## Configure Submission Workflow

This workflow contains the master list of all defined Submission Production Tasks, and is the default workflow initially associated with all Article Types.

Use 'Add New Task Type' here to add a new Submission Production Task Type to the system for use in all Workflows. Unused Task Types may also be removed from the system using the remove icon (🗑️). The Task Order defined here applies primarily to this workflow alone, but is also used by the Production Status Grid.

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).

Workflow Name: All Submission Production Tasks

	Order	Task Type (◆=Milestone)	Assign if First Task	Trigger Publication Charges	Trigger Task(s)	Allow Repeats
	<input type="text" value="1"/>	Copy Edit [Edit]	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input type="text" value="2"/>	Edit Graphics [Edit]	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Copy Edit	<input checked="" type="checkbox"/>
	<input type="text" value="3"/>	Composition [Edit]	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Composition	
	<input type="text" value="4"/>	Author Proof [Edit]	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input type="text" value="5"/>	Final Files to Print [Edit]	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
	<input type="text" value="6"/>	Final Files to Online Posting [Edit]	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
🗑️	<input type="text" value="7"/>	◆Trigger Publication Charges Due [Edit]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Final Files to Online Posting	<input checked="" type="checkbox"/>

Maximum Production Task Name is 100 characters

NOTE: Automated workflows can have tasks that trigger the “Payment Due” APC call.

**Thank You!**