



ProduXion Manager[®]

Functionality Checklist

- ✓ Provides workflow tracking for journals, reference works and other structured scholarly publications.
- ✓ Imports files and XML metadata from Editorial Manager and from third-party peer review systems.
- ✓ Manuscripts can (optionally) be manually entered into ProduXion Manager.
- ✓ System administrators can define an unlimited number of [user roles](#). Each role has its own profile that determines the functionality available to a user with that role designation.
- ✓ Supports validated ORCID iD entry. Users can use their ORCID username and password as a [Single Sign-On](#) (SSO) option to access their ProduXion Manager account across multiple sites.
- ✓ Supports [Funder Registry](#) for funder identification.
- ✓ Supports [Ringgold](#) for standardized institutional identification.
- ✓ Supports latest version of JATS 1.2A metadata import and export. Supports MECA-compliant import/export transmittal.
- ✓ System can be used to create workflows based on configurable production tasks.
- ✓ [Production task](#) definitions include task name, default assignment letters, target completion timeframes, and designated assignees by role (e.g. Author, copy editor, vendor, etc.), file definitions, etc.
- ✓ Tasks can be assigned and completed manually or by machine-to-machine transfer.
- ✓ Tasks can be batch assigned, chained, and [triggered automatically](#).
- ✓ Late tasks are automatically flagged and added to the “At risk” submissions folder on the Main Menu.
- ✓ Appropriate files and data can be accessed by authorized staff, Authors, Editors, and vendors to complete tasks.
- ✓ Staff can easily identify users with pending or late production tasks, and trigger reminder emails through reporting functionality.
- ✓ Staff can configure automated reminders based on pre-selected criteria (e.g. send reminder 2 days before copy editing is due).
- ✓ Metadata associated with each manuscript (such as production notes, Author information, etc.) are accessible to production staff by clicking a “details” link.
- ✓ Production notes can be maintained at both the manuscript level and/or associated with a particular issue.
- ✓ Manuscript records can contain an unlimited number of companion files (“work in progress”), such as proofs and copyedited manuscripts.
- ✓ Appropriately authorized users can check-in and check-out production files based on task assignment (version control).
- ✓ Task completion can include the upload of appropriate files and configurable web forms to respond to questions by the publication.
- ✓ Authorized system administrators can enable real-time modifications to configuration options (e.g. task definitions) and workflow steps.
- ✓ System includes functionality to define issues ([schedule groups](#)) with associated metadata (e.g. page budget, volume number, issue number, etc.).

- ✓ Schedule group functionality can be used to [support books workflows](#).
- ✓ Issue “budgets” (e.g. page budget) are automatically recalculated based on the manuscripts included in the issue.
- ✓ Issue management: manuscripts can be pushed or pulled into issues.
- ✓ Manuscripts can be assigned to more than one issue at one time. Manuscripts can be re-sequenced within issues to create a TOC.
- ✓ Issues can include section headings.
- ✓ Manuscript metadata (e.g. page numbers) can be manually entered or imported into issues.
- ✓ Tasks can be assigned at the issue level.
- ✓ Files can be stored at the issue level (e.g. cover art).
- ✓ Staff can search for in-production manuscripts based on selected criteria.
- ✓ Staff can create and then append “Quick Searches” or [short cuts to frequently run searches](#) to main menus.
- ✓ Staff can [search people records](#) based on selected criteria.
- ✓ Staff can use powerful “proxying” capabilities that allow appropriately authorized administrators to push through tasks that have been assigned to other users.
- ✓ Production staff can configure an unlimited number of email letters in HTML or plain text format.
- ✓ Letters appear in appropriate drop-down menus (e.g. during task assignment) or can be triggered by automatic workflow “events”.
- ✓ Letters can be modified by production staff in real time.
- ✓ [Letters can include merge fields](#) such as Author name, manuscript title, task due date, etc.
- ✓ Letters can include “deep links” so that recipients can complete activity without remembering log-in information.
- ✓ Staff can send “Ad Hoc” letters at any time from manuscript records or schedule group/issue records.
- ✓ Production staff can quickly surface schedule alerts and other workflow information on the [Production Status Grid](#) by toggling to view all the manuscripts, or just those designated to a specific schedule group/issue.
- ✓ Authorized production staff have one-click access to a historical audit trail that provides all transactions, letters and status changes associated with each manuscript.
- ✓ Uploaded image files can be checked automatically against journal-defined image publication criteria with [Image Quality Check](#).
- ✓ Bibliographies can be validated automatically through external databases such as Crossref or PubMed.
- ✓ Bibliographies can be linked automatically to external databases so that missing or incorrect information can be retrieved from the target database.
- ✓ Bibliographies can be automatically re-formatted to the publication’s desired reference style with [Reference Check](#) via Inera’s eXtyles.
- ✓ [DOIs can be assigned](#) according to the publisher’s preferred DOI format.
- ✓ Manuscript metadata can be transmitted to external databases such as PubMed and Crossref during the production workflow.
- ✓ Production staff can configure NIHMS-PubMed deposit via a production task, including embargo period rules using PolicyManager.
- ✓ ProduXion Manager complies with ISO 10646, the standard which enables the storage of non-roman and diacritic characters. Symbols such as π can be reliably transferred from peer review to production and online delivery.
- ✓ ProduXion Manager provides tools for normalizing data to ISO 3116, the standard which specifies country names and codes. Country designations can be reliably mapped as data is transferred between systems.
- ✓ Users can access integrated publication fee processing tools such as [RightsLink](#) or SciPris. Payment due fee collection can be triggered during production workflow.
- ✓ Staff can easily surface key metrics and gauge performance with PM’s built-in, robust [Enterprise Analytics Reporting \(EAR\)](#) suite.
- ✓ Reporting can be configured to include [cross-journal groupings](#) that can be assigned to specific roles.
- ✓ Production staff can utilize 500 flags that are specific to PM to quickly communicate details about a submission, including custom question responses.
- ✓ Production staff can see when a particular flag was turned on or off in history.
- ✓ Color-coding can be used to quickly communicate information about file types or workflow statuses.

- ✓ System is securely hosted in mirrored data centers to ensure COB (continuity of business) and disaster protection.
- ✓ When used in conjunction with Editorial Manager, production tasks can be processed [in parallel to the editorial workflow](#).
- ✓ When using in conjunction with Editorial Manager, editorial tasks can be assigned and completed without initiating production with [Task Manager](#) feature.
- ✓ ProduXion Manager is available in [multiple languages](#): German, French, Simplified Chinese, Japanese and Spanish.
- ✓ Staff administrators can configure production workflows per article type.
- ✓ Production notes can be configured to display within the Production Status Grid. Users with proper role permissions can edit the note text.
- ✓ Staff can view and perform tasks across multiple publications within their journal portfolio without needing to log in-and-out of each site with Enterprise View (EV).
- ✓ Users can preview uploaded image files via the File Inventory for Companion and Submission files.
- ✓ Staff can rename downloaded or transmitted files while maintaining the file's original name (at upload) unchanged in the system via the File Reference feature.
- ✓ An Auxiliary PDF will be available for submission files under production task assignment.
- ✓ Production tasks can be configured to trigger a Post-Submission Metadata call to inform integrated repositories when the submission is published, specifically for journals and Authors allowing submission files to be uploaded to external repositories in Editorial Manager.
- ✓ Conflict of Interest disclosure files may be included in transmittals via a production or editorial task as configured by the journal.