



# ProduXion Manager<sup>®</sup>

## ProduXion Manager Tutorial

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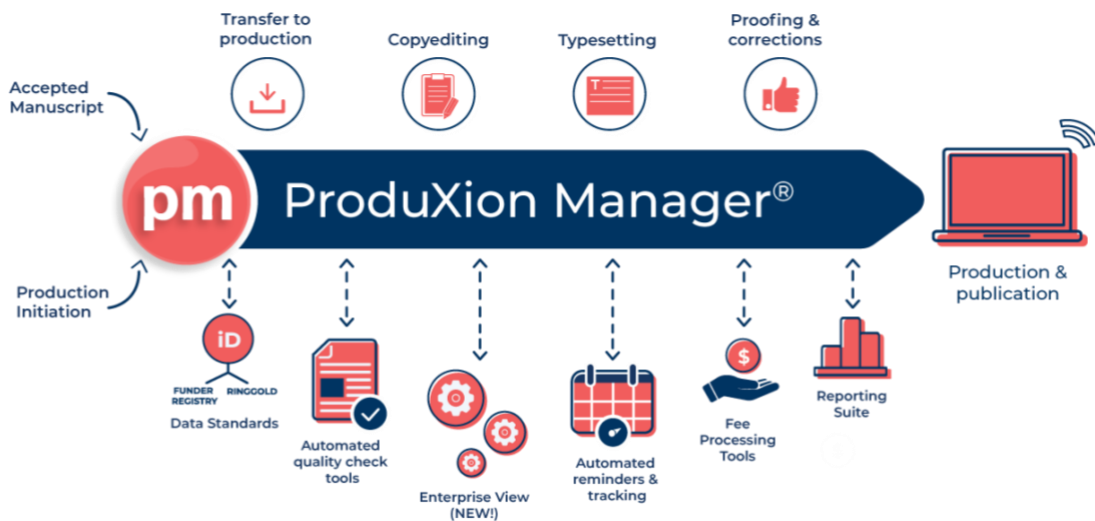
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## ProduXion Manager Overview

ProduXion Manager® (PM) is the leading, cloud-based production and distribution tracking system for publishers. Upon manuscript acceptance following the completion of peer review, files and metadata can be automatically transferred to PM for downstream processing. The highly configurable system streamlines the production workflow for publishers, improves efficiency, and reduces time to publication. PM can be used in conjunction with Editorial Manager® (EM), the leading manuscript submission and peer review tracking system, for a true end-to-end publishing experience.



ProduXion Manager works seamlessly with Editorial Manager OR as a stand-alone production tracking system.

Some features and benefits of ProduXion Manager include:

- Easily assign tasks and files, visually track workflows, and send reminders
- Comprehensive content management and version tracking
- Issue and article-based workflows and tracking available to support all publication models
- Machine-to-machine transfer of tasks and files to vendors using XML (including JATS)
- Export manuscripts and data to downstream systems such as PubMed Central and hosting platforms
- Enterprise Analytics Reporting (EAR) offers quick visualization of key data and track KPIs
- Ability to manage user permissions by configuring roles for administrators, freelancers, and vendors
- Process publication fees using RightsLink® and other eCommerce platforms

Since ProduXion Manager provides functionality involving the upload and download of much larger production-related files, it is licensed separately and includes transaction charges to cover the cost of additional storage and bandwidth. A Publisher or individual publication can license the entire ProduXion Manager product or license individual components of ProduXion Manager.

If Editorial Manager is provided by your Publisher, please contact your Publisher concerning ProduXion Manager. If Editorial Manager is licensed directly from Aries Systems, please contact an Account Coordinator.

## ProduXion Manager Feature Overview

### Artwork Quality Check

Editorial Manager will interact with third-party Artwork Quality Check tools via a generic interface (using XML), which allows transmittal of the artwork files from EM to a designated Artwork Quality Checking system. The AQC system analyzes the artwork and provides results back to Editorial Manager via XML. These results are then made available to the Author and/or Editor on designated pages, and to the Editor on the Transmittal Form.

### Displaying Artwork Quality Check Results

The primary objective is to provide visibility to the AQC results. Authors and the Editorial Office could then provide substitute artwork.

After submission files are uploaded and sent to the PDF builder (either by the Author or the Editor, depending on the configuration) all files that are designated as requiring AQC (configured in PolicyManager under Edit Submission Items) are sent to the AQC tool. From the *Submissions Waiting for Approval* or *Revisions Waiting for Approval* pages, a link will appear labeled "View Artwork Quality Results". The Author/Editor should click on this link to view the results.

All files will be listed in the Artwork Quality Results, but only those designated as requiring analysis will display any results (e.g., Pass, Pass with Warning, Fail). The Author/Editor may View the PDF, Download individual source files, and View the Artwork Quality Results for each file.

When the Artwork Quality Results are viewed by clicking the View link, a report will provide analysis of the file.

The Artwork Quality Results will also display specific information on any problems with the file as well as possible solutions. This means that the Author (or Editor) can make any necessary changes to the artwork files and upload new files that are better suited for production.

**Note:** All new files (*Submission Items configured for Artwork Quality Checking*) will also undergo Artwork Quality Checking.

### Triggering Artwork Quality Check

Publications select certain events in the Editorial process that will trigger AQC of designated Submission Items.

AQC may be triggered by one of four hard-coded actions in EM, provided that the relevant Submission Item Types are also configured for AQC. These four actions are deemed to be the most likely circumstances where publications would want to quality check artwork.

The following actions listed below may trigger AQC:

- **Original PDF Building:** Publications who accept most of the submissions received are likely to want to start pursuing production quality artwork as early as possible. Note this trigger may be initiated by an Author building a PDF or an Editor who edits the submission and rebuilds the PDF.
- **Revised PDF Building:** Many publications begin pursuing production quality artwork at the time of revision (i.e., if a revision is being submitted, the manuscript will likely be accepted). This trigger may be initiated by an Author building a revised PDF or an Editor who edits the submission and rebuilds the revised PDF.
- **Final Disposition – Accept:** Some publications wait until a submission is accepted for publication before pursuing production quality artwork. This is more common at highly selective publications, where a very small percentage of the submissions received are ultimately accepted for publication.
- **Uploading a Substitute Item on the Transmittal Form:** The Editorial Office may upload substitute artwork at any point in the editorial process. If a substitute item is uploaded on the transmittal form, AQC is triggered at this point.

**Note:** *Uploading and downloading artwork files requires quite a bit of bandwidth and will be paid for by publications on a per upload/download basis. Therefore, publications are encouraged to trigger AQC at steps that make sense for their Editorial Office process flows and not necessarily at every step in the process.*

**To Configure:** Submission Items that need to go through Artwork QC must be configured in PolicyManager > Edit Submission Items. Edit any Submission Item that needs to go to the AQC tool for quality checking and check the “Include this Item Type for Artwork Quality Checking” setting.

To determine when AQC should take place, go to PolicyManager > Configure Artwork Quality Checking. Click the checkboxes next to the actions that should trigger AQC.

Instructional text will be displayed to users when they are looking at the AQC results. Publications can also require that Authors check the AQC results before submitting the paper by checking the box labeled “Authors are Required to View AQC Results before approving their submission”.

## Automatic DOI Generation

A DOI (Digital Object Identifier) can be automatically generated upon notifying an Author of an Accept decision or upon initiating production on a submission for those publications with Production Tracking. There are two format options that can be selected:

- A DOI Generation Prefix, followed by a '/' followed by the Manuscript Number associated with the submission, followed by ".1" (e.g. 10.1029/COAS-D-08-00099.1).
- A DOI Generation Prefix, followed by a '.' followed by '[an integer that increments out to 7 decimal places]' (e.g. 10.1371/journal.pntd.0000146).

**To Configure:** Contact an Aries Account Coordinator for initial set up of Automatic DOI Assignment and identification of the automatic DOI format.

**To Configure in PolicyManager:** Go to Configure Automatic DOI Assignment and select the system event that will trigger the Automatic DOI Assignment:

- Notify Author of Accept Decision: DOI is assigned when the Author is notified of an Accept decision.
- Initiate Production: If the publication has Production Tracking enabled, the Automatic DOI Assignment can be triggered when a user initiates production on a submission.

**Configure Automatic DOI Assignment**

Select the system event that will trigger Automatic DOI Assignment.

**Event for Automatic DOI Assignment**

Cancel Submit

- Notify Author of Accept Decision
- Please select an event
- Initiate Production

## Production Tracking

Production Tracking is a set of features that allows publications to manage activities that are not directly related to peer review. For most publications, these will be production-related activities, such as typesetting or proofreading. However, *any* activity outside the main peer review workflow could be managed using a Production Task.

For example, publications that carry out copyediting prior to acceptance and release to their Publisher could use a Production Task to manage the assignment of the submission to a freelance copyeditor, who can then pick up and return files through the system before transmittal to the Publisher. Publications that control their own preparation for publication can extend this to the entire post-acceptance workflow, assigning and tracking all stages through to publication.

Production Tasks are part of the ProduXion Manager system and are not automatically available to all Editorial Manager Users. Please contact the Publisher or Aries representative to make these features available.

## Editor and Publisher Roles

Use the Editor and Publisher RoleManager permissions to control which users can view Production Tracking-related information. Publisher roles can be used for users who have no need to interact with the peer review process, while Editor Roles can be used for users who work on both. Publications will need to have at least one normal Editor Role configured to “Initiate Production” and to access the System Administration area, as these can only be done from the main Editorial Menu.

Publisher roles can also be assigned to external vendors who only need permission to submit and receive tasks and view their tasks in PM.



## Role-Based System

PM comes equipped with configurable role permissions.



**Author**

- Easily create Author proofs
- Perform status updates



**Editor**

- Assign and track tasks
- Transmit files to/communicate with external vendors
- Review and approve proofs



**External Vendors**

- Receive and submit production tasks

## Production Task Assignments

Production Tasks are central to setting up a production workflow, and users can track any process carried out as a Production Task. A Production Task is like a Reviewer or Editor assignment and accomplishes the following:

- Allows publications to assign a submission to a person to work on; tasks usually describe processes like Copyediting, Typesetting, Proofreading, etc.
- Allows publications to set (and will automatically calculate) due dates for each process; tasks can be linked to target publication dates.
- Allows publications to control who can carry out each task.
- Allows publications to make selected files available as part of the assignment.
- Allows the recipient to upload new files through the EM/PM system.
- Automatically records the dates for each activity.
- A Production Task is a simple assignment; there are no options to invite a person, although Production Tasks can be canceled easily once assigned.

## User-Defined Production Statuses

User-Defined Production Statuses complement static Production Task Assignments by supporting custom status terms, which are applied to submissions based on rules defined by the System Administrators.

The system checks for a change in a submission's Production Status whenever a submission is put into production or has production completed, or whenever a Production Task for that submission is assigned, submitted, or canceled.

## Follow-on Assignments

Some tasks can be configured to allow "Follow-on" assignments. When a recipient closes such a task, they are given the option of immediately assigning another task. This allows publications to ask a third-party to assign work using the system or to tie certain tasks together.

## Workflow and Scheduling

PM provides a spreadsheet-like Production Status Grid view of key tasks, so that the progress of submissions can be tracked throughout the workflow.

Individual tasks can be given a target duration and their due dates can also be linked to publication dates.

## Target Publication Dates

Each submission can have up to three target publication dates:

- A submission-specific target online publication date; this is independent of any issue/schedule group target publication date and can be used to bring an important submission forward ahead of the rest of its issue/schedule group.
- A target online publication date from an associated schedule group; this is the target online date for all submissions in an issue/schedule group.
- A target publication date for the schedule group, normally the print publication date; this is to define a target date for all submissions in the issue/schedule group.

Using these three dates, publications can set a target date for printing an issue, set an earlier target date for putting all submissions in the issue online, and, if necessary, give individual submissions an even earlier target online date. Publications might want to give individual submission earlier target online dates if, for example, they need to meet a conference date or to ensure the earliest possible publication date.

## Volume and Issue Structure (Schedule Groups)

Submissions can be assigned to Schedule Groups (normally individual Issues) 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.

## File Management

Production Tasks allow users to assign specific files to people as part of the task assignments. When each user completes their assignments, they can upload files as part of the submission process.

## Companion Files

Files associated with Production Tasks are designated Companion Files and do not appear in the main Submission PDF.

## Color Coding

Publications can use special color-codes to manage Companion Files. Assigning a default color code allows users to immediately assign Companion Files to a specific group. Color-coding may also be used to indicate progress (e.g., change a file's color from Red to Yellow to Green as it is processed).

## Hiding

Publications can hide old Companion Files as they are replaced with new ones to maintain a current set of live files and simplify file management. Users may select multiple Companion Files to be hidden at a time by selecting the appropriate boxes in the "Select" column and then clicking the "Hide Selected Companion Files" button found under the "Download Zip File" button on the *File Inventory* page.

## Replacing

Publications can "Replace" an existing Companion File when uploading a new Companion file. This means automatically hiding File A when File B is uploaded as a replacement.

## How is Production Tracking used?

Assignments are made for individual submissions, with Schedule Groups being used to manage groups of submissions for scheduling purposes. Typically, a publication will:

- Initiate production on individual submissions at any time, even before Decision or Final Disposition.
- Use the Production Status Grid to review the progress of submissions as they move through the production workflow.
- Set up Schedule Groups for specific issues or for other scheduled deliverables, such as conference proceedings or a monthly web site update.
- Set individual online Target Publication Dates for a submission or assign a submission to a Schedule Group to inherit target dates from the group.
- Assign Production Tasks to process the submission, selecting specific files for the recipient to work on.
- Send notifications to users whom tasks have been assigned and allow them to download assignment files from PM, submit completed tasks, and upload any new files as needed.
- Use the Production Status Report to chase down outstanding tasks.
- Move completed submissions out of production, either individually or by closing the associated schedule group.

## Configuration Overview

When initially configuring a unique production workflow for a site, the following configuration options should be reviewed carefully:

- Tracking columns, selecting from MS Number (carried over from Editorial Manager), DOI, Corresponding Author Name, and Article Title.
- Defining file policies.
- Defining Color Codes for companion files.
- Creating Companion File Submission Item Types in PolicyManager > Edit Submission Items and assigning default color codes if required.
- Creating letters for each Production Task as well as Production Task reminder letters. For each task, the following may be needed:
  - An Assignment letter to the person carrying out the task on initial assignment.
  - A Cancellation letter to the person carrying out the task assignment.
  - A Submit Task letter to the publication, sent upon completion of the task assignment.
- Defining Production Tasks for each step in the workflow and setting:
  - Assignment policies (who can assign and receive the task; if follow-on tasks are allowed).
  - Scheduling policies (does the task appear in the Status Grid, task duration and lead times before publication).
  - Upload policies (what types of files can be uploaded).
  - Letters sent (on assignment, cancellation, and completion).
- Adding initial Schedule Groups (volumes and issues) to the PM system before transferring submissions to production.

## Production Tracking Detailed Features and Configuration

## Suppressing the Author Submission Interface

Publications that use ProduXion Manager for production tracking but do not use Editorial Manager for manuscript submission can use the “Hide Submission Interface” Author permission option to restrict manuscript submission. When this permission is turned on, it will prevent Authors from creating and submitting unsolicited manuscripts. With this option, all folders related to the editorial peer review management of an unsolicited manuscript are removed.

If checked off, an additional subpermission called “Display Invited Submission Folders” will allow Authors to submit *invited* manuscripts only. With this additional option enabled, the Author Main Menu will include all folders relating to the management of invited submissions as well as Production Task assignments (“Current Task Assignments”, “Completed Production Task Assignments”).

**To Configure:** Go to RoleManager and select Edit for the Author role. Select “Hide Manuscript Submission Interface” and, if desired, select “Display Invited Submissions Folders” as well.

## Entering Submissions into Production

### Automated Initiate Production Process

Publications may configure their site to automatically initiate production when the final disposition is set to an Accept final disposition term based on the following three choices, eliminating the need for users to scan the *All Submissions with Final Disposition: Accept* folder for submissions to move into production:

- Setting Final Disposition to ‘Accept’
- Setting Final Disposition to ‘Accept on Submission’
- Setting Final Disposition to ‘Accept and Transmit’ (Conference Submissions only)

If a site is configured to automatically initiate production when one of the above Final Disposition terms are selected for a submission, the Editor will proceed through the Transmittal Form process as usual and find that production is initiated automatically after the final stage of the process.

If the Editor has the “Allow Task Assignment and Assignment to Schedule Group when Initiating Production” permission enabled they will, upon setting a final disposition of Accept, be brought to the first page of the Initiate Production process, where they can also proceed to assign the submission to a Schedule Group, assign a first submission task, or choose to not assign a task and move the submission into the Production Initiated – No Tasks Assigned folder.

If the Editor does not have this permission, then production is initiated behind the scenes, and the Editor is returned to the referring page per the current workflow. The submission will appear in the Production Initiated – No Tasks Assigned folder.

**To Configure:** To automate the Initiate Production process, go to PolicyManager and click the *Configure Automatic Production Initiation* link. On this page, administrators may configure a trigger point from the following three choices shown below:

|                         |   |
|-------------------------|---|
| Regular Submissions:    | <input 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'  |

**Note:** *This configuration does not prevent production from being initiated at an earlier stage. It only means that submissions will automatically be sent to production if this has not already manually happened before the Final Disposition is set.*

### **Initiate Production Manually and Assign Production Tasks and Schedule Groups**

To move a submission into Production, the Initiate Production function must be used. A user with the “Initiate Production Manually” permission enabled in RoleManager will see an “Initiate Production” link in the Action Link column in the main folders accessed from their Editorial Main Menu.

Publications may configure user roles so that a member of the Editorial staff can initiate production on a submission without being asked if they want to assign the submission to a Schedule Group or Assign a Production Task. In this case, the submission is placed directly into the Production Initiated – No Tasks Assigned folder located on the Production Tasks menu. This is controlled using the “Allow Task Assignment and Assignment to Schedule Group when Initiating Production” permission.

If the user has the “Allow Task Assignment and Assignment to Schedule Group when Initiating Production” permission, they will be prompted to perform several Production related tasks following the initiation of production. These include:

- Assigning the submission to a Schedule Group (optional).
- Assigning the first Production Task (optional).
- Assigning any additional Production Tasks relevant at this stage (optional).

If a submission is assigned to a Schedule Group, users can add pagination and running order information, if known. A user with the “Modify Schedule Group” permission can also go in later and add or change these details.

### **Initiate Production without Assigning a Submission Production Task**

After being prompted to assign a submission to a Schedule Group, Editors are then given the option of assigning a Submission Production Task. When a submission is not assigned to a Schedule Group, then the *Assign Production Task* page now has a “Proceed Without Selecting a Task” button. Clicking the “Proceed Without Selecting a Task” button moves the submission into production and places the submission into the Production Initiated – No Tasks Assigned folder.

## Assign Production Task For Manuscript Number: DEMOCD-D-19-00028 mary mary (UNITED STATES): "Transmittal Test"

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.

To initiate production without assigning a production task, click the 'Proceed Without Selecting a Task' button.

**Schedule Group:** No Schedule Group Assigned

**Production Task:** Please Choose a Production Task

Cancel

Proceed with Selected Task

Proceed Without Selecting a Task

## Input Submissions Directly into Production Tracking

Editors with appropriate permission may enter a submission directly into Production by first searching for the Author record (from the "Search People" link on the Production Tasks menu) and then clicking the "Create Submission" button from that Author's people record.

The screenshot shows the 'Search People - Update Information' interface for a user named 'Ms. Abby Author'. The interface is divided into two main sections: 'User Information' and 'Personal Information'. The 'User Information' section includes fields for 'Default Login Role' (set to 'Author'), 'Default Login Menu' (set to 'Editorial Menu'), and several checkboxes for 'Available as a Reviewer?', 'Board Member?', and 'Forbidden as a Reviewer?'. It also has dropdown menus for 'Reviewer Role', 'Publisher Role', and 'Editorial Role'. The 'Personal Information' section includes fields for 'Title' (set to 'Ms.'), 'Given/First Name' (set to 'Abby'), 'Middle Name', and 'Family/Last Name' (set to 'Author'). On the left side of the form, there are buttons for 'Inactivate this User', 'Anonymize this User', and 'Create Submission' (which is circled in red). Below these buttons are checkboxes for 'Exclude this user from receiving all batch and reminder emails:' and 'Retain Name' (checked).

The Editor is then brought to a streamlined submission entry form, displaying the set of fields configured for the selected Article Type as well as date fields required by the system for creating the submission record. Editors are asked to enter the metadata for the submission, any Other Authors associated with the submission, and are given an opportunity to upload files for the submission. No PDF is created using this submission method.

**Note:** When a submission is created using this streamlined entry method, there is no PDF created for the submission at any point in the lifecycle of the submission. If Editors believe there will be a need for a PDF at any point, they should proxy into EM/PM as the Author and enter the submission using that method instead.

## Create Submission

Enter Metadata

Add/Edit/Remove Authors


Attach Files

### Enter Metadata

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

\* **Article Type:**

\* **Title:**



**Section:**

**Manuscript Number:**   
 Check to have number auto-assigned

**Revision Number:**  Select 0 if no revisions, or a number corresponding to the revision number

**DOI:**

**Initial Date Submitted:**  (mm/dd/yyyy)

**Date Revision Submitted:**  (mm/dd/yyyy)



|   |  |
|---|--|
| <b>Section:</b>                                   | Please Choose <span style="float: right;">▼</span>   |
| <b>Manuscript Number:</b>                         | <input type="text"/><br><input type="checkbox"/> Check to have number auto-assigned                                      |
| <b>Revision Number:</b>                           | 0 <span style="float: right;">▼</span> <i>Select 0 if no revisions, or a number corresponding to the revision number</i> |
| <b>DOI:</b>                                       | <input type="text"/>   |
| <b>Initial Date Submitted:</b>                    | 10/26/2021 <input type="text"/> (mm/dd/yyyy)   |
| <b>Date Revision Submitted:</b>                   | <input type="text"/> (mm/dd/yyyy)<br><i>Enter the date a first revision or higher was received.</i>                      |
| <b>Final Decision Date:</b>                       | 10/26/2021 <input type="text"/> (mm/dd/yyyy)   |
| <b>Date Final Disposition Set:</b>                | 10/26/2021 <input type="text"/> (mm/dd/yyyy)   |
| <b>Final Disposition Term:</b>                    | Completed Accept   |
| <b>Submission Target Online Publication Date:</b> | <input type="text"/> (mm/dd/yyyy)  |

**Keywords (separated by semicolons):**

**Classifications:**

Select Manuscript Classifications

**Abstract:**

✂ 📄 📁 📁 📁 ↶ ↷ 🔍 🔍 📄 🔄

**B** **I** **U** **~~S~~** **x<sup>2</sup>** **x<sub>2</sub>** **I<sub>x</sub>**
☰ ☷ ☰ ☷ 🌐 🗨 Ω

Styles Format ✓

**Author Comments:**



Are you a member of the DEMOCD Organization?

Instructions

Please select a response

Yes

No

|                                     |                                |
|-------------------------------------|--------------------------------|
| <b>Target Number of Pages:</b>      | <input type="text" value="0"/> |
| <b>Black and White Image Count:</b> | <input type="text" value="0"/> |
| <b>Color Image Count:</b>           | <input type="text" value="0"/> |

Submissions entered via this interface are automatically moved into Production (Production is Initiated) upon creation and are placed in the Production Initiated – No Tasks Assigned folder.

**Note:** *If a publication is configured to have an automatically generated DOI using the Manuscript Number, the submission must have a manuscript number entered (or automatically generated) before the user can navigate from the Create Submission/Enter Metadata page. The DOI field will not be editable once the record is created.*

**To Configure:** A RoleManager permission is available for Editor roles in the ProduXion Manager section called “Create Submission”. Enabling this permission allows Editors (with the “Search People” permission also enabled) to search for the Author Record from the Production Tasks menu and create a new submission from that Author’s record.

### Defining Identifiers to Display

ProduXion Manager allows publications to simplify some of the Production Tracking pages that list submissions by selecting the main identifiers used to identify the submission information. Users can select from:

- **Manuscript Number** (carried over from Editorial Manager)
- **DOI**
- **Article Title**
- **Corresponding Author Name**

Note that the Corresponding Author Name will display with the Author’s country in brackets to allow extra time for Production Tasks assigned to them, if necessary.

**To Configure:** Use PolicyManager > Configure Identifiers Displayed in Production Tracking. Check the selection boxes by the identifiers to be displayed on Production Tracking pages.

### Defining Color Codes

Publications can create custom color coding to apply to Companion Files uploaded by the Author during submission, by Editors through the ‘File Inventory’ page, or whenever a user completes a Production Task assignment.

There are two main ways to use the codes:

1. Simply define a set of codes and manually change each Companion File in the File Inventory or when submitting a task.
2. Define a set of codes and specify a default code for each submission item type. Note that color coding can only be applied to Companion Files.

These approaches can be combined. For example, using a Red (=Unchecked) color code for all files on upload and changing this manually to Green as each file is checked.

**To Configure:** First, the publication needs to define a set of color codes to use. Use PolicyManager > Configure Color Codes for Companion Files. Each color code requires a color to be selected as well as a description that is displayed when the cursor hovers over the code.

Once a set of codes has been defined, they can be assigned manually to individual files from the File Inventory page using the “Change Color Code” link.

Give anyone who needs to change color codes the “‘Upload’, ‘Hide’ and ‘Restore’ Companion Files” permission using RoleManager.

A default color may be used whenever a specific type of Companion File is uploaded.

### **Defining Companion Files**

Before Production Tracking can be used, the publication must create one or more Submission Items to act as Companion Files. In effect, each submission has two different pools of files associated with it – the submission files originally submitted by the Author for peer-review, and the Companion Files used specifically for production.

Note that the system can be configured so that an Author can upload a Companion File, but Companion Files are never built into the PDF approved by the Author, or the PDF that is sent for peer-review. Any type of file that needs to be peer-reviewed should not be configured as a Companion File.

Companion Files are controlled through the PDF Handling setting for submission file types.

**To Configure:** Use PolicyManager > Edit Submission Items. To define a Submission Item as a Companion File, set the “PDF Handling” setting to “Companion File (not built into PDF)”.

Optionally, choose a default color code. When a file of this type is initially uploaded, the color code for that file will be set to this value.

### **Submission Production Tasks**

Submission Production Tasks allow publications to follow any production workflow, from a single copyediting step to a more complex series of tasks. Each Submission Production Task has several key configuration areas to allow a publication to:

- Limit who can assign the task and who can receive it.
- Determine whether files are expected to be returned on completion of the task and define what kinds of files can be uploaded.
- Define the scheduling of the task, including its duration, how long before publication it needs to finish, and whether this task should be tracked in the main Production Status Grid.

- Permit follow-on assignments after completion of this task to string sequences of tasks together.
- Define any instructions and assignment, cancelation, and completion notification letters.
- Transmit files and metadata to a third party via FTP.

Publications are encouraged to take time to analyze their workflow and break it down into a list of potential tasks before creating the steps in ProduXion Manager. In general, tasks should be created:

- To process submission files. This is the most common type of task. Example tasks include: Typesetting, Copyediting, Correct Artwork, Proofreading, etc.
- To make files available to someone, for example, Proofreading by Author or Review Art Files.
- To request information or files from someone, for example, Request for Updated Artwork.
- To indicate that a submission has reached a key date, for example Copy Complete. This would be denoted by a special “Milestone” production task.

**To Configure:** Use PolicyManager > Configure Submission Production Tasks. This displays a list of currently configured Submission Production Tasks.

| Order | Task Type (◆-Milestone)      | Assign if First Task | Trigger Task(s) | Allow Repeats |
|-------|------------------------------|----------------------|-----------------|---------------|
| 1     | Task 1 - Intake [Edit]       |                      |                 |               |
| 2     | Task 2 - Conversion [Edit]   |                      |                 |               |
| 3     | Task 3 - Copyedit [Edit]     |                      |                 |               |
| 4     | Task 4 - CE Review [Edit]    |                      |                 |               |
| 5     | Task 5 - Composition [Edit]  |                      |                 |               |
| 6     | Task 6 - Author Proof [Edit] |                      |                 |               |
| 7     | ◆Task 7 - Final Proof [Edit] |                      |                 |               |
| 8     | SG Pages Test [Edit]         |                      |                 |               |

Workflow Name: All Submission Production Tasks

Update    Insert Special Character    + Add New Task Type

Maximum Production Task Name is 100 characters

Hidden Submission Production Tasks

To remove a task from the list, click the Remove icon ( ).

If the ‘Remove’ icon does not appear, click on Edit and Hide the task instead. Submission Production Tasks cannot be removed once they have been assigned, but the Publication can still edit the task or hide the task to prevent it from being assigned again going forward. An existing task may be modified by clicking on the Edit link next to the task name. To hide a task, check off the Hide box on the Edit Submission Production Task page and click the Submit button.

### 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).

To add a task, type a Production Task name into the empty field below the existing tasks and click the “Add New Task Type” link to display the main Edit Submission Production Task page.

The order in which the tasks are listed is important, as this defines the order in which they will appear across the Production Status Grid. Tasks should be ordered so that they consecutively reflect the current workflow.

Task ordering is the main way to define a workflow, in that earlier tasks appear higher in the list of assignments and to the left in status grids. Publications can also add a greater degree of control by using follow-on task assignments and limiting the types of tasks each Editor and Publisher role can assign. However, ProduXion Manager will allow users to reassign earlier tasks or assign tasks out of order, as this allows for the greatest flexibility in daily use.

The Edit Submission Production Task page allows publications to configure the following options: 1) General Options, 2) Assignment Options, 3) Companion File Options, 4) Scheduling and Due Date Options, and 5) Letter Options.

## General Options

### New Production Task Name

This defines the name for the task, shown in status grids and to the recipient of the task. We recommend that publications do not use the “X sent to Y” format, but instead describe the process using “-ing” words, i.e., use “Typesetting” rather than “Manuscript to Typesetter”.

### Hide

Use the Hide setting to remove a task from the active tasks list. This will deactivate the task and prevent it from being assigned going forward. A hidden task can be reinstated later by editing the task from the “Hidden Submission Production Task” list and clearing this setting.

### Automatically Assign Next Production Task

Publications may configure tasks to be automatically assigned when production is initiated or when a trigger task is completed. When production is initiated or any task is submitted, the system will check whether the initial or next task (either based on Submission Production Task order or the Workflow defined for the Article Type of the submission) should be automatically assigned.

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)

When a Submission Production Task is set to be automatically assigned, publications must select a specific assignor (one person who will be considered the person who assigned the task) and one assignee (one person to whom the task will always be automatically sent).

**To Configure:** To configure a task to be automatically assigned, go to PolicyManager, Configure Submission Production Tasks, and edit an existing task (or add a new task). On the configuration page, select/check the “Assign Automatically when Production is initiated (if this is the first task in the workflow)” or the “Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)” option.

Once selected, the “Can be Assigned by” and “Can be Assigned to” options will refresh to display the available user records for the selected Roles. Only one person can be selected as the “Can be Assigned by” option, and only one person can be selected as the “Can be Assigned to” option.

When these configurations are saved, define the initial production task or trigger tasks on the Configure Submission Production Tasks page in the “Assign if First Task” and “Trigger Task(s)” columns.

### Assignment Options

- **Production Task Custom Instructions:**  
Type instructions to the person completing the task here. Publications should identify the core purpose of the task, provide any checklists to the recipient, and tell them how to complete the task and what files they should be uploaded.
- **Can be Assigned by:**  
Allows publications to define which roles can be allowed to assign the task. For example, a “Typesetter” may be allowed to assign an “Author Proof Correction” task but that is likely to be the only type of task they are allowed to assign.
- **Can be Assigned to:**  
Has two main settings: *Corresponding Author only*, which automatically sends the submission to the Author. For example, automatically assigning a task to the Corresponding Author for “Author Proof” tasks. *Selected Editor/Publisher Roles only*, which defines what types of people can carry out the task. For example “Typesetting” is likely only to be assigned to someone with a role of “Typesetter”.
- **Allow Follow-on Task Assignments:**  
If checked, this presents the assignee with an additional *Assign Follow-On Production Task* page from where they can assign one or more additional tasks. Note that the roles to which this production task can be assigned must be able to assign at least one type of Production Task for this to be useful.

### Companion File Options

- **Show Warning if File not uploaded when Task is Submitted:**  
Should be used for any production task for which new files are expected to be returned to the publication. For example, “Typesetting” would normally require several versions of the typeset manuscript (i.e., XML version, PDF proof version).
- **Limit the Submission Item Types that can be uploaded when Task is Submitted:**

The types of files that the assignee can return may be pre-defined here.

**Note:** *Publications will need to create the Item types before users can select them here using PolicyManager > Edit Submission Items. Only Companion Files will be available for selection (items designated as “Companion File (Not built into PDF)” for PDF Handling).*

### **Automatically Select Files on Task Assignment**

Production tasks may be configured to automatically select certain types of files as Assignment files when a task is being assigned. This is especially useful when used in conjunction with the “Automatically Assign Next Production Task” feature.

When the “Automatically Select Files for Assignment” option is enabled for a Submission Production Task, then when that Submission Production Task is assigned manually, all non-hidden files of the selected item types (if any) are pre-selected, i.e., their “Allow Download” checkbox is set/checked.

When a Submission Production Task is assigned automatically, all files of the selected item type are automatically included in the task assignment.

**To Configure:** Go to PolicyManager > Configure Submission Production Tasks and edit an existing task (or add a new task). On the configuration page, select/check the “Automatically Select Files for Assignment” option.

When checked/selected, this option enables a multi-selector menu listing all Submission Item types (including Companion Files) as well as a system-generated PDF option. Matching files in the submission File Inventory will become Assignment Files for the task.

### **Production Questionnaires**

Publications may wish to associate a Production Task Questionnaire with a Production Task to be completed by the task assignee. When a task is configured to include a questionnaire, recipients can respond to the questions when submitting the assigned task.

**Note:** *Questionnaire functionality is not available for Schedule Group Production Tasks, tasks submitted via FTP (Import), or milestone tasks.*

Once a task is submitted and the associated questionnaire completed, the responses are displayed in the Production Tasks section of the Production Details page. The display of the questionnaire responses is collapsed by default, but users may expand the section to view the completed Questionnaire by clicking the + icon next to the [Task Name] Questionnaire Responses link.

| Production Tasks   |                     |
|--|---------------------|
| <b>Description:</b>  | SG Pages Test       |
| <b>Production Task Status:</b>   | Completed           |
| <b>Assigned To:</b>  | ✉ Christine Donovan |
| <b>Date Assigned:</b>  | Jun 29, 2020        |
| <b>Date Task Due:</b>  | Jun 29, 2020        |
| <b>Completed</b>   | Jun 29, 2020        |
| <hr/>  |                     |
| <b>Description:</b>  | Task 1 - Intake     |
| <b>Production Task Status:</b>   | Completed           |
| <b>Assigned To:</b>  | ✉ Archie Assistant  |
| <b>Date Assigned:</b>  | Nov 17, 2021        |
| <b>Date Task Due:</b>  | Nov 24, 2021        |
| <b>Completed</b>   | Nov 17, 2021        |
| <hr/>  |                     |
| <input type="checkbox"/> Task 1 - Intake Questionnaire Responses (Archie Assistant, Editorial Assistant)                         |                     |
| <div style="border: 1px solid #ccc; padding: 5px;">           Will you accept this manuscript?<br/>           Yes         </div> |                     |



**To Configure:** Go to PolicyManager > Questionnaire Policies > Create Custom Questions. From the Create Custom Questions page, existing questions may be edited by clicking the Edit link or new ones may be added by clicking the Add Question button.

Custom Questions must then be associated with a Questionnaire on the Create Questionnaires page, accessed by the link in the Questionnaire Policies section of PolicyManager. Add or edit an existing Questionnaire to add newly created Custom Questions.

Once a Questionnaire has been created, it may then be associated with a Submission Production Task. Click the PolicyManager > Configure Submission Workflows and Production Tasks link. Edit the All Submission Production Tasks workflow. Add or edit any existing Submission Production Task. On the Add/Edit Submission Production Task page, select a Questionnaire from the drop-down list of all existing Questionnaires in the Questionnaire Options section of the page.

|   |   |
|---|---|
| <b>Questionnaire Options</b>                          |   |
| <b>Use Custom Questionnaire:</b>                      | Production Questionnaire  |
| <b>FTP Options</b>                                    |   |
| <b>Submission Production Task Transmittal Method:</b> | <div style="border: 1px solid #ccc; padding: 2px;">       Production Questionnaire<br/>       None<br/>       Author Questionnaire<br/>       Submission Questionnaire<br/>       Revision Questionnaire<br/>       Article Type Questionnaire<br/>       Production Questionnaire     </div> |

**Production Task Transmittal can include an XML metadata file and the system PDF file**

Users can send production task assignment files to an FTP server. The completed Production Task assignment can then be submitted back into PM via FTP as well.

- The set of files FTP'ed out when a Production Task is assigned can include the system PDF as well as any number of Submission Items and Companion Files. These files are also available for assignment if the task is not FTP'ed.
- A metadata file in XML format can be included in the zip file of assignment files. This file is only available when the task is FTP'ed.
- The metadata file can be in a publisher-specific format or can follow several DTDs available for selection on the Edit Submission Production Task page.



The system-built PDF (Editor/Author version) is now available as an assignment file. As with other assignment files, its checkbox must be selected for it to be associated with the Production Task assignment:

| Submission Files    |             |             |                                      |         |               |            |                          |
|---------------------|-------------|-------------|--------------------------------------|---------|---------------|------------|--------------------------|
| Item                | Description | Item Family | File Name                            | Size    | Last Modified | QC Results | Allow Download           |
| Manuscript          | PDF         | Document    | A Brief History of the Universe.docx | 11.5 KB | Oct 02, 2019  |            | <input type="checkbox"/> |
| Check All Clear All |             |             |                                      |         |               |            |                          |

| Companion Files     |                |              |                   |         |               |                                      |            |                          |        |
|---------------------|----------------|--------------|-------------------|---------|---------------|--------------------------------------|------------|--------------------------|--------|
| Item                | Description    | Item Family  | File Name         | Size    | Last Modified | Uploaded By                          | QC Results | Allow Download           | Action |
| Companion Test      | Title Page     | Supplemental | Title Page 2.docx | 11.5 KB | Oct 02, 2019  | Edwin Expert, Author                 |            | <input type="checkbox"/> | Hide   |
| Companion Test      | Companion Test | Supplemental | Title Page 2.docx | 11.5 KB | Oct 02, 2019  | Christine Donovan, Production Editor |            | <input type="checkbox"/> | Hide   |
| Check All Clear All |                |              |                   |         |               |                                      |            |                          |        |

**Note:** The XML metadata file does not appear in the list of Submission Files or Companion Files. Instead, it is created behind the scenes and added to the FTP'ed zip file if the Submission Production Task is configured to include an XML file. This configuration is done in PolicyManager on a task-by-task basis.

**To Configure:** Go to PolicyManager > Configure Submission Production Tasks link. On this page, create or edit a production task. Configurations are made under the 'FTP Options' section of the page.

The "Submission Production Task Transmittal Method" drop-down list provides access to several DTDs, including the NLM method, JATS method, and more. The selection of the specific DTD controls the formatting of an XML file to be added to the FTP'ed zip file. The XML file is named [%JOURNALACRO%\_%MS\_NUMBER%].xml, and it is also listed in the FTP'ed ".go.xml" file.

If no assignment files are selected when the task is assigned and the task is configured with a DTD, the only contents of the FTP'ed zip file will be the metadata file.

| FTP Options   |  |
|---|--|
| <b>Submission Production Task Transmittal Method:</b>             | <div style="border: 1px solid black; padding: 5px;"> None<br/> None<br/> General Submission Production Task Export<br/> Aries Export<br/> MECA Manuscript Export<br/> NIHMS-PubMed Central Deposit (manuscript-bulk)<br/> NIHMS-PubMed Central Deposit<br/> NLM Production Task Export<br/> NLM 3.0 Production Task Export<br/> NLM 3.0 DTD v2 Export<br/> Highwire PAP Export<br/> JATS 1.0A Production Task Export<br/> JATS 1.1A Production Task Export<br/> JATS 1.1A (Aries Custom) Production Task Export<br/> BITS 2.0 Production Task Export<br/> JATS 1.2A Production Task Export<br/> JATS 1.2A (Aries Custom) Production Task Export </div> |
| Secure FTP Server address<br>(e.g. sftp://ftp.ariessys.com[:21]): |  |
| Username  |  |
| Password  |  |
| Subdirectory:   |  |
| Email Address (for transmittal notification):                     |  |

Depending on the publication's Publisher, a publisher-specific method may also be available.



The “General Production Task Export” method is also available. Using this method triggers an FTP to the configured server with assignment files FTP’ed in zipped format. This method does not include a metadata file in the zip file.

The “Aries Export” method FTPs an XML file compliant with the Aries export schema along with any assignment files in a zipped format.

If a metadata file formatted to a specific DTD is required, please contact Aries’ Customer Service to discuss the development of a custom Submission Production Task Transmittal Method.

Submission Production Tasks may also be configured to send an Aries Import .XML file as part of the transmittal. Recipient vendors may then populate specific data elements in the .XML that can then be used to feed data back into the system, such as Actual Online Publication Date, Publication Date, or pagination information. When the vendor sends the Aries Import .XML file back as part of the task completion files (using the Aries Import Profile), the data elements provided may be automatically populated to the appropriate fields in PM.

To configure, check the box next to “Include Aries Import XML file in transmittal” in the FTP Options section. To select fields to include on the Aries Import .XML file, click the “Select Fields for Import” link under the XML file is required option. From the resulting page, select elements to include. Fields with a hardcoded checkmark are identifying fields that are sent in the XML file to allow vendors to identify the submission and cannot be overwritten.

Additionally, select Aries Import in the Submission Production Task Import Profile drop-down list.

**Note:** *If the XML file is required option is enabled, the task import will fail if the vendor does not include the Aries Import XML file in the zip file returned to the Aries FTP server.*

|   |  |
|---|--|
| <b>Submission Production Task Import Profile:</b> | Aries Import   |
| Email Address (for import notification):          | <input type="text"/>                                     |
|   | <input checked="" type="checkbox"/> XML file is required |
|   | <a href="#">Select Fields for Import</a>                 |

### Assign Production Task without Files

Production Tasks may be configured so that assignment files are not required when sending out a task to allow for only metadata information to be sent or to enable a recipient to return files and close out the task via FTP without having to log into the site.

When the “Allow task assignment and FTP without Assignment Files” setting is enabled, users will be able to assign a task without being required to select one or more Assignment Files. In this case, a .go.xml file will be FTP’ed out. A zip file containing a metadata XML file will be sent out only if a Submission Production Task Transmittal Method is selected. The metadata XML file will be the only file included in the zip file.

### Assign Production Task without Sending Letter

At times, users who work within ProduXion Manager may find that an e-mail notification for each production task assignment is unnecessary. To accommodate this, Submission or Schedule Group Production Tasks may be assigned without sending assignment letters.

When Editors assign Submission or Schedule Group Production Tasks, and the task is configured to allow the assignment of the task without sending a letter, then an “Assign Task without Sending Letter” button displays on the *Assign Production Task* page.

*Sample Page Layout (button displays at top and bottom):*

**Assign Production Task For Manuscript Number: Unassigned  
Allan Author(UNITED STATES)**

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Cancel Assign Task and Send Letter **Assign Task without Sending Letter**

Schedule Group: No Schedule Group Assigned  
Production Task: Task 6 - Author Proof  
Task Assigned to: Allan Author  
Due Date: 11/16/2021 (mm/dd/yyyy)

Clicking the “Assign Task without Sending Letter” button completes the assignment of the task without sending a letter to the assignee.

**To Configure:** To configure a Submission Production Task to allow the assignment without sending a letter, go to PolicyManager > Configure Submission Production Tasks and either Edit an Existing Task or Add a New Task. On the *Edit Submission Production Task* page, scroll to the bottom of the page where Letters are selected. Select/Check the “Allow Task Assignment without Sending Letter” checkbox under the “Assignment Letter” selector dropdown.

### Show Task in Production Status Grid

Publications may designate key tasks that will appear in the Production Status Grid. Unless the workflow is very simple, it is preferable to not display every possible production task here. For example, if a task is assigned very rarely, it should not likely appear in the Production Status Grid, as it will not provide useful information on most submissions. If several processes often occur together, such as “Sub Editing” and “Check Artwork”, only one of these tasks should be displayed in the grid.

### Scheduling and Due Date Options

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

This allows publications to create a Production task which records a significant date purely for display on the Production Status Grid. It can also be used to trigger a notification to a selected person.

#### Due Date Calculation

When a production task is assigned, ProduXion Manager will calculate the due date based on these settings. Publications can select any combination of these settings, including no settings at all, and ProduXion Manager will take the earliest possible, valid date for the Due date. For most tasks, publications will select the “Calculate a Due Date based on: Number of Days after Assignment Date:” option and enter the number of days for the maximum time the task should take. For submissions on the Production Status Grid, it is possible to select one or more of the remaining options:

- Calculate a Due Date based on: Number of Days after Assignment Date

- Calculate a Due Date based on: Number of Days prior to Submission Target Online Publication Date
- Calculate a Due Date based on: Number of Days prior to Schedule Group Target Online Publication Date
- Calculate a Due Date based on: Number of Days prior to Schedule Group Target Publication Date

**Note:** *If a publication has decided to include National Holidays in due date calculations for Production Tasks, the due date is deferred a day for each day of the assignee's National Holidays that overlaps with the period from the current date to the potential due date. A final check and adjustment is then carried out to ensure that this derived date does not fall on a National Holiday. If it does, then the due date is moved to the earliest possible working day.*

When a Production Task is assigned, ProDuXion Manager can be configured to calculate the due date as outlined above. There are three possible dates that can be used for scheduling:

- **Submission Target Online Publication Date:** This is manually set for each submission, using the 'Production Details' page. This date is specific to the submission alone and is not overridden when the submission is assigned to a Schedule Group. It allows publications to identify an earlier target date for individual submissions, even if they are assigned to an issue or other Schedule Group.
- **Schedule Group Target Online Publication Date:** This is inherited from the Schedule Group when a submission is assigned to it.
- **Schedule Group Target Publication Date:** This is the print publication date, inherited from a Schedule Group when a submission is assigned to it.

ProDuXion Manager assumes that a submission that will be published in print will be assigned to an issue and that the "Schedule Group Target Publication Date" will be the anticipated date of print publication.

However, it also assumes that some publications may wish to put an issue online as a whole before the print version is released. The "Schedule Group Target Online Publication Date" is the anticipated date that this will happen.

In addition, ProDuXion Manager is designed so that individual submissions can be given a special "ahead of print" publication date, typically an online release, handled by the individual submission's "Submission Target Online Publication Date".

Schedule Group Target dates can be modified from the Manage Schedule Group folder by users with the "Manage Schedule Groups" RoleManager permission.

**To Configure:** Go to PolicyManager > Configure Production Tasks. For any specific tasks, set the "Calculate a Due Date based on:" settings to select the target dates to be used in any due date calculations.

If the task has no expected duration, either uncheck all settings or set the task to be a Milestone task.

If a publication does not use forward scheduling or the task is not on the main critical path but should be completed within a set time, select only the "Calculate a Due Date based on: Number of Days after Assignment Date:" option and enter a default timescale.

If the task is on the main critical path, and must be completed by a certain deadline, select the “Number of Days prior to Submission Target Online Publication Date”, “Number of Days prior to Schedule Group Target Online Publication Date”, or “Number of Days prior to Schedule Group Target Publication Date” and fill in the appropriate number in the box.

### Letter Options

These select the template to use for the standard letters sent when assigning, cancelling or submitting (completing) a task. In each case users will be able to edit the letter before it is sent.

There are three standard letters associated with each Production Task, detailed below.

### Assignment Letter

Sent to the person to whom the task is being assigned, this should contain instructions on logging in, obtaining the files, and where to go when the recipient has completed his or her task. Production Task may be configured not to send this letter.

### Cancel Assignment Letter

Sent to the person to whom the task was assigned, this should let him or her know that the assignment will no longer appear in his or her list of assigned tasks.

### Submit Task Letter

Sent to the person who assigned the task; this should be a brief notification that the task has been completed as well as a reminder to go in and assign the next task, if appropriate.

Production correspondence can be configured to allow for the following options to note who the letter is from:

- Use E-Mail address of user triggering the Correspondence.
- Use the publication’s “Set ‘E-mail From’ Address”.
- Use Corresponding Editor’s E-Mail Address.
- Use Corresponding Production Editor’s E-Mail Address.

**Note:** *If a letter is configured to be “from” the Corresponding Editor or Corresponding Production Editor and a particular submission does not have such a person associated with it, the system will fall back to the publication’s default email address configured under PolicyManager > Set “E-mail From” Address.*

**To Configure:** Go to PolicyManager > Edit Letters. Edit each letter in the Production or Production Correspondence family and select the preferred option under “Sender’s E-mail address”:

### Edit 'Production' Letter

Cancel Preview Letter Save

**Custom Instructions**

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

View Default Instructions      Revert to Default Instructions

**Letter Purpose:** PROD Task - New Assignment

**Subject:** New Production Task Assignment

**Letter Family:** Production

**Sender's Email Address**

Use email address of user triggering the Correspondence

The Journal <trashjo@ariessys.com>

The Journal <trashjo@ariessys.com>

Use Corresponding Editor's E-mail address

Use Corresponding Production Editor's E-mail address

**Additional Recipients**

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

**Automatically cc: bcc:**

All Co-Authors

Corresponding Editor

Corresponding Production Editor

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**Allow choice on 'Send Letter' page**      The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc:      bcc:

      Display checkbox for co-Authors

Allow attachments

Allow sender to add Rich Text (HTML) formatting

Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

**Letter Body:** Insert Special Character | Insert Merge Field: Custom | System

Hello,

You have been assigned a task.

Find the task here: %PROD\_TASK\_EDITOR\_PUBLISHER\_DEEP\_LINK%

Thanks,

The Journal

Cancel Preview Letter Save

## Deposit Submissions to PubMedCentral

Publications may configure a Submission Production Task to FTP the submission files to the National Institutes of Health Manuscript Submission System (NIHMS), using the publisher's existing NIHMS login credentials. The NIHMS then creates a PDF for approval by the Author and deposits the PDF to PubMed Central.

**Note:** The Author approval and PMC deposit is done outside of the EM/PM system.

**Note:** A publication cannot use this method to deposit to NIHMS if they are participating in PMC.

If the publication is not participating in PMC, they are eligible to use this method as follows:

- The publication must be recognized by the NLM.
- The publication must have an account with the NIHMS.

- The publication must configure a Submission Production Task as described in the “To Configure” section below.
- The publication must enter their NLM TA code into a custom transmittal field as described in the “To Configure” section below.
- The publication must ensure that file descriptions are unique for all files within a file type (i.e. all Submission Items in the Figure family must have different file descriptions (if selected as Assignment Files), all Submission Items in the Table family must have different file descriptions etc.)
- The NIHMS requires a file from the Default or Document Submission Item family to be sent to them, along with any relevant figures or tables. The system PDF should not be sent as an assignment file, as the NIHMS builds its own PDF.

Due to the fact that this type of task is usually at the end of the Production process, this will typically be configured as a Milestone Task.

After the Task has been assigned and the selected files have been transmitted, publications may go to the NIHMS Web Interface and review the files:

1. Login to the NIHMS web interface (<http://web.nihms.nih.gov/db/sub.cgi>)
2. Click the “publisher” login route from the login route table.
3. Enter the username and password for your established account and click the Login button.

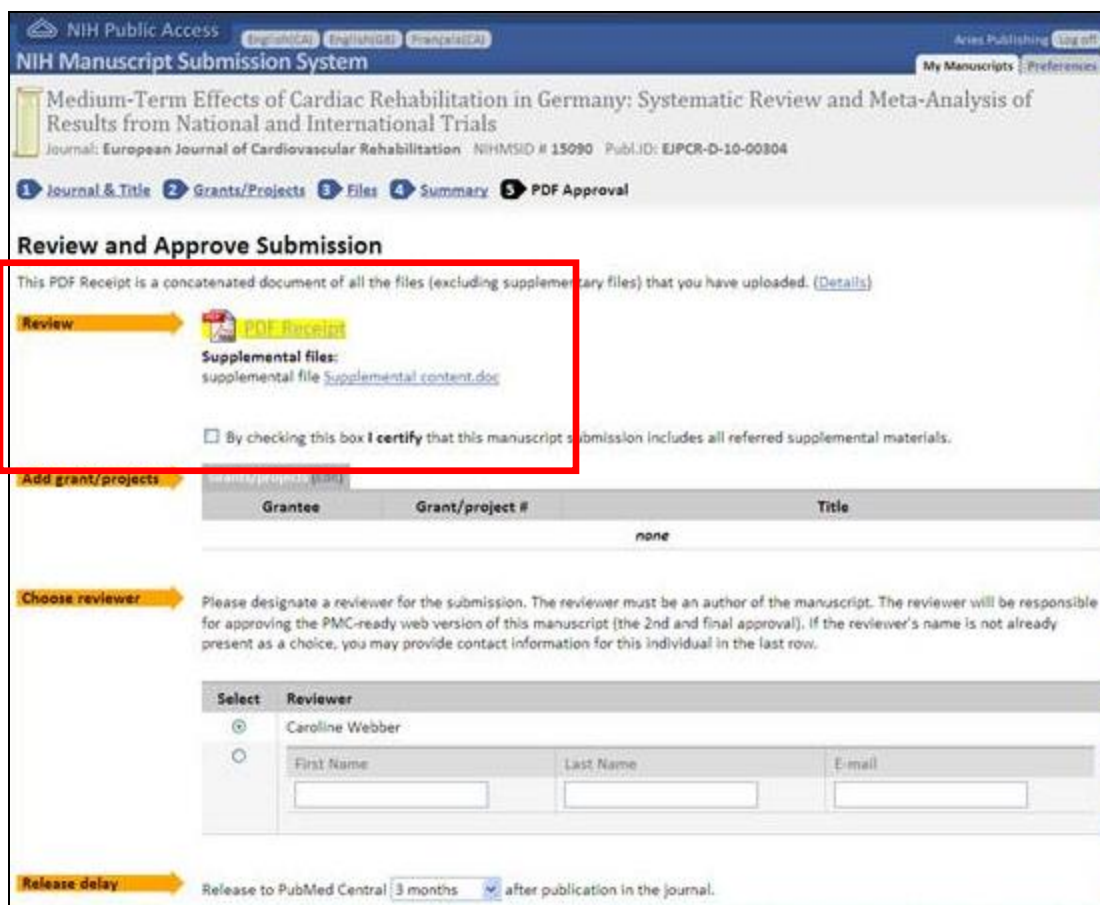
You will be automatically directed to the NIHMS interface. The FTP’ed submission should be listed, and will initially have the status “Awaiting submitter approval of PDF receipt”.

**Note:** It may take up to an hour from FTP for the file to go into this status.



Clicking the article title in this interface allows you to review the NIHMS PDF (listed as “PDF Receipt”):





1. Click on the “PDF Receipt” link.
2. Ensure that all manuscript, figure, and table files that were FTP’ed have been built into the PDF.
3. Ensure that any supplemental files are listed on the last page of the PDF, and on the web page as “Supplemental Files”.

After clicking the “PDF Receipt” link a listing of the transmitted files is displayed.

**To Configure:** Go to PolicyManager > Configure Submission Production Tasks to edit an existing task to use this FTP method or create a new task using it. In the FTP Options section of the page, select “NIHMS-PubMed Central Deposit” from the Submission Production Task Transmittal Method drop down.

**Note:** When using this method, do not select the checkbox “Allow task assignment and FTP without Assignment Files”.

## Edit Submission Production Task

Cancel Submit

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).

[MIDDLE OF PAGE NOT DISPLAYED]

### Questionnaire Options

Use Custom Questionnaire:

None

### FTP Options

Submission Production Task Transmittal Method:

NIHMS-PubMed Central Deposit

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 package file names

Rename transmitted files by File Reference

NIHMS Embargo Period Rule: None

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

Username

Password

Subdirectory:

Email Address (for transmittal notification):

Fill in the rest of the information as appropriate.

**Note:** *Subdirectory is required when using the NIHMS-PubMed Central Deposit method and must be set to "upload".*

In PolicyManager, go to Transmittal Policies, Add/Edit General Metadata fields, and configure a new field with the description "NLM TA". Select a Field Type of "Text" and select the "Single Value" radio button in the "Default Value for Field" area. Set the default value to the NLM TA code for your publication (this code is available by contacting the NIHMS). This is required to deposit manuscripts into the NIHMS.

## Production Status Terms

There are four static Production Status terms. These are displayed on the *Details* and *Production Details* pages. They are:

1. Not in Production
2. In Production
3. Production Completed
4. Returned to Production

Unlike the peer-review statuses, these are not editable by the user and are not intended to give a detailed summary of progress through production. The Production Status Grid may be used to review the status of submissions in production.

**To Configure:** No configuration is possible. These are terms generated by the system.



## User-Defined Production Statuses

User-defined Production Statuses complement static Production Task Assignments by supporting custom status terms, which are applied to submissions based on rules defined by the Administrators.

The system checks for a change in a submission's Production Status whenever a submission is put into production or has production completed, or whenever a production task for that submission is assigned, submitted, or canceled.

To use this feature, Administrators must define a set of Production Status Terms. Each status term has an associated set of rules, or conditions, which the system will assess when a status check is triggered. These rules work by checking any existing production tasks previously linked to the submission, if any, and seeing which have ever been started or completed, or are currently in progress.

Each individual status term is assessed separately, and it is possible for multiple individual status terms to be linked to a submission at the same time to give an overall Production Status, which is a composite of those terms. For example, a submission could go through the following production status changes:

1. With Copyeditor
2. With Copyeditor, Clarification Requested from Author
3. With Copyeditor, Clarification Requested from Author; Artwork being Redrawn
4. With Copyeditor, Artwork being Redrawn
5. With Copyeditor
6. Copyediting Complete

In the above example, items 2, 3 and 4 are different combinations of three separate status terms, assigned to this submission by different rules that evaluate the state of production tasks related to copyediting, querying the Author, and redrawing artwork. As each task is assigned or submitted, the overall status is re-evaluated, dropping or adding the individual component terms.

There are two different composite Production Statuses that can appear. In folders and on the *Details* pages, all status terms appear against each submission. On the *History* page, only special status terms configured with a "Record in History" option are shown, allowing users to concentrate on only the most important status changes.

The User-defined Production Status terms appear in a new column in the main production tracking folders. All production status terms currently associated with a submission appear here, not just those marked as "Record in History".

The User-defined Production Status terms are added to the *Search Submissions* interface as a new Criterion, so a search may be created to identify all submissions at a specific production stage. Each custom status term automatically displays in the value dropdown when this criterion is selected.

The default *Production Details* page displays the full Production Status term(s) after the "In Production" status term.

**Note:** Users can customize the *Details* page in *PolicyManager*. If you are using customized *Details* pages, the *Editorial* and *Production Details* layouts can be modified to add or remove this status term as desired.

The *History* page for a submission displays a history of changes in Production Status terms if the current user has permission to view it. This is in addition to the functionality that listed the actual production task assignments.

Not every change in Production Status is recorded in History. The History lists only those Production Status terms that are configured with “Record in History” set; and a new entry is created only when such a status is removed from or added to a submission when a status check is triggered.

**To Configure:** Go to PolicyManager > Configure Production Statuses.

This link is only displayed for publications using ProduXion Manager.

Click the “Add” button on this page to define new status terms. Once multiple terms have been added, the order in which the status terms will be shown when combined as a Production Status on production pages and the *History* page may be specified.

**Tip:** Define the order so that the most important status terms appear before minor status terms and so that, within terms of equal priority, status terms appear in the order they will be used in production.

The *Edit Production Status* page allows publications to define the rules that govern each status term and rename or hide status terms. First, type the Production Status Term that will be assigned to submissions into the “Production Status Name” field. Check the “Record in History” box if this is an important status that should be tracked and reviewed on the *History* page.

**Tip:** This can be used to give users who do not have access to the Production Menu, but can access History, an overview of a submission’s progress.

Use the “Status Rules” table at the foot of the page to define a set of conditions that the submission will be judged against whenever a Production Status check is triggered (moving into production or assigning, submitting, or canceling production tasks).

The “Criterion” dropdown list provides a list of all currently active production tasks in combination with three conditions that can be tested for each task:

- [Production Task] Started
- [Production Task] Completed
- [Production Task] In Progress

For each of these, the remaining columns allow users to create a term of the form: “[Criterion] Is Equal to True/False” or “Is Not Equal to True/False”.

**Example 1:** The simplest type of production status term to create is the “With XXX” or “Task YYY in Progress” style of term, which appears when a particular task has been assigned and is being worked on – basically, when the submission is “out” with a supplier. To configure this type of production status term, use the “[Production Task] is In Progress” criterion, together with “Is Equal to True”. Only a single term needs be configured. This status term will automatically turn off when there are no production tasks of this type currently open, but

note that if two or more tasks of this type are assigned at the same time, this rule will remain true until the last one is submitted or cancelled.

Use the “Add” button to build up a more complex set of status rules; this allows users to check a combination of different production tasks when assessing whether the status term should be applied.

**Tip:** Use “In progress” if you can; this is true when one or more tasks of the designated type are active; as soon as the task is completed, this term will automatically be removed.

**Example 2:** Another common production status term is a “Ready for X” style of status, which usually occurs when the submission is between two production tasks. For example, creating a “Ready for Typesetting” status after Copyediting is completed but before Typesetting starts. To configure this type of production status term:

- Add a rule to check that all prerequisite tasks have ended.
- Add a rule to check that the next task has not started.

First, set the first Status rule to check whether the previous production task has been completed:

Second, add another rule to check that typesetting has not yet started. Use the “Add” button to add a second term.

At this point, this rule is saying “The submission is Ready for Typesetting when Copy-Editing is done, and we have never started Typesetting”.

**Note:** “Completed” and “Started” criteria are usually used in conjunction with other terms. Users usually need a second rule to ensure the status term is turned off by another task assignment. For any production task, “Started” means “At least one such task has ever been assigned.” This becomes true as soon as you assign the first such task and remains so even after you submit that task. Similarly, “Completed” means “At least one such task has ever been submitted.” These do not refer specifically to the task that triggers the check but rather all tasks historically associated with the submission.

Optionally, when configuring a task, additional terms may be added to ensure that all production tasks that need to be completed before proceeding are covered with checks to ensure that they have been completed or are not in progress; here, a check is performed to ensure that there is not a currently outstanding request for artwork with the Author:

All the above rules use the **AND** operator to ensure that all terms must be true at the same time for the Status term to be applied. Use the **OR** operator to define alternatives. Once more than two Status Rule terms are defined, **AND** operators take precedence over **OR** operators. Users can use the “(” and “)” parentheses drop downs to group search terms together, so they are evaluated first.

**Example 3:** Another type of status is the “check-off” status, where terms describe key items that need to be checked off as completed. For example, publications may want a submission to start with the three status terms: [Not Copy-Edited]; [Not Set]; [Not Web Prepped].

Add a status term for each of these with a single status rule to check that the associated task has never been completed.

As soon as each referenced task is completed, the associated status term will disappear. Even if Copyediting is restarted, it will not reappear, because the first task still counts as completed.

There is a single “View Production Status History” permission for both Editor and Publisher roles, which governs whether users can see the list of previously assigned production tasks.

## Editorial Manager Pages Modified by Production Tasks

### Details

The Production Notes field can be displayed on this page for Editors who do not have access to the Production Details link but need to review production notes.

A “Production Status:” section has been added. Once the first Production Task has been assigned and the submission is in production, this will display the current Production Status for the submission.

**To Configure:** No configuration is required to display the Production Status section. This section will appear automatically once Production Tracking has been activated for the publication. To allow a user to view the Production Notes field, go to RoleManager to enable the permissions “View Production Notes on Manuscript Details” and “Edit Production Notes on Manuscript Details” for the desired Editor and Publisher role(s).

### History

Two sections are added to the standard History view. Whether or not they display for a user is controlled by RoleManager permissions:

1. *Production Status History:* This displays a table of all Production Task assignments and their status. It can be used to assess how far the submission has progressed.
2. *Production Correspondence History:* This displays all Production Task-related letters generated for the current submission.
3. *Assigned Task Files:* This displays an Assignment Files link for all production tasks where production task assignment files were selected on assignment and/or uploaded upon completion.

Users may switch between a “Status Type” view, which separates Production Correspondence from normal correspondence and a “Timeline View,” which combines these into a single set of correspondence organized by date. The example shows the Status Type view with a link to “Switch to Timeline View.”

**History for Manuscript Number: DEMOCD-D-20-00031 "Edit Submission Test"**

[Status History](#)
[Edit Submission History](#)
[Production Status History](#)
[Production Task History](#)
[Correspondence History](#)
[Submission Flag History](#)

[Switch to Timeline View](#)
  
[Close](#)

**STATUS HISTORY**

| Status Date  | Document Status      | Status Days | Role Family | Revision | Operator                                |
|--------------|----------------------|-------------|-------------|----------|---|
| Aug 26, 2020 | Accept               | ----        | EDITOR      | 0        | Ann Associate<br>[Proxied by mary mary] |
| Aug 26, 2020 | Decision In Process  | ----        |             | 0        | Ann Associate<br>[Proxied by mary mary] |
| Aug 26, 2020 | With Editor          | ----        | EDITOR      | 0        | mary mary                               |
| Aug 26, 2020 | Manuscript Submitted | ----        | EDITOR      | 0        | Allan Author<br>[Proxied by mary mary]  |

**To Configure:** To allow a user to view these sections, go to RoleManager and edit the desired Editor or Publisher role(s). Enable the permissions “View Production Status History” and “View Production Correspondence History” and save.

### Add External Correspondence to Submission (Production) Correspondence History

Editors may be given permission to manually add External Correspondence entries (an item of correspondence, such as an E-mail, received outside of the EM/PM system) to the History of a submission, where they can be viewed alongside EM/PM-generated Internal Correspondence.

Editors with the “Add/Edit External Correspondence” permission enabled will see an Add Production Correspondence button at the top of the Correspondence History section of the *History* page.

**PRODUCTION TASK HISTORY**

| Production Task | Date Task Assigned | Date Task Due | Assigned To       | Assigned By | Production Task Status | Date Task Closed | Closed By         | Assigned Task Files |
|-----------------|--------------------|---------------|-------------------|-------------|------------------------|------------------|-------------------|---------------------|
| Test Task 1     | Mar 20, 2020       | Mar 27, 2020  | Christine Donovan | mary mary   | Completed              | Mar 20, 2020     | Christine Donovan | Assignment Files    |

**CORRESPONDENCE HISTORY**

[Add Editorial Correspondence](#)
[Add Production Correspondence](#)

| Correspondence Date | Letter  | Recipient         | Status           | Revision | Operator          |
|---------------------|---|-------------------|------------------|----------|-------------------|
| Mar 20, 2020        | PROD Task - Submit Task                       | mary mary         |                  |          | Christine Donovan |
| Mar 20, 2020        | PROD Task - New Assignment                    | Christine Donovan |                  |          | mary mary         |
| Mar 19, 2020        | Publisher Notification of Accepted Manuscript | Christine Donovan | Completed Accept | 0        | mary mary         |

Clicking this button will bring the Editor to the *Add External Production Correspondence* page. Editors may set the date and time (US Eastern Time) of the correspondence, enter a Description for the correspondence (a required field), add any associated attachments, and enter the sender (From:) and recipient (To:) of the letter, the subject line, and the contents of the letter.

### Add External Production Correspondence

Items marked with an asterisk are required. The 'Correspondence Date' and 'Description' fields will be listed on the History page. Paste or type any desired text into the 'Letter Body' area, but note that any formatting will be lost. Click 'Open in New Window' if you need extra space to edit the correspondence.

Note: Please check the text for any sensitive information that should be removed or obscured (such as passwords or names of reviewers), as the system cannot automatically anonymize correspondence you add manually. Correspondence where you enable the 'Display in Author's Correspondence History' checkbox can be viewed by the author if your publication allows this.

**Display In Author's Correspondence History**

\* Correspondence Date: 11/16/2021 (mm/dd/yyyy)      Time: Hour: 01, Minute: 36, AM/PM: PM, U.S. Eastern Time

\* Description:

From:

To:

Letter Subject:

Attachments:

Letter Contents:

Rich text editor toolbar with icons for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, and others.

Styles: Format: Font: Size: [Color] [Background Color]

Clicking the Submit button saves this letter and adds it to the *History* page of the submission, inserted into the list chronologically. The text “(External)” is displayed next to the letter link identifying this letter as External Correspondence. This correspondence is then visible to all users with “View Production Correspondence History” permission enabled. Editors with the “Add/Edit External Correspondence” permission may also Remove or Edit these external correspondence items, if desired.

| CORRESPONDENCE HISTORY |   |                   |        |          |                   |  |
|------------------------|---|-------------------|--------|----------|-------------------|--|
| Correspondence Date    | Letter  | Recipient         | Status | Revision | Operator          |  |
| Nov 16, 2021           | Copyeditor Due Date Inquiry (External) <span style="float: right;">Remove Edit</span> | mary mary         |        |          | mary mary         |  |
| Mar 20, 2020           | PROD Task - Submit Task   | mary mary         |        |          | Christine Donovan |  |
| Mar 20, 2020           | PROD Task - New Assignment  | Christine Donovan |        |          | mary mary         |  |

Editors may also use the External Correspondence feature to note that a phone call was received, such as an Author calling to check on the status of a submission in production. In this example, the Editor could use the Add Production Correspondence button and simply enter a Description of “Phone: Status Query from Author” as well as the date/time of the call to record it.

**To Configure:** Go to RoleManager and enable the “View Production Correspondence History” and “Add/Edit External Correspondence History” for the desired Editor or Publisher role(s).

## Publish Information

A new target date, the “Submission Target Online Publication Date” has been added to the Actual Publication Dates.

The layout of this page changes if the submission is assigned to a Schedule Group after production has been initiated, to show two columns: Target and Actual Publication Data. For Commentaries, the Target data will initially show the information entered when requesting the commentary. For all other submissions, the Target date will show information entered during the production process, either manually for the submission, or inherited from an assigned Schedule Group.

**To Configure:** No configuration is necessary

### Automatically Copy Target Information to Actual Information on Publication

Publications may be configured so that the Target Information for a submission can be automatically copied into Actual Information fields for all submissions in the Schedule Group when that Schedule Group is closed, or for individual submissions when *End Production* is clicked for that submission. Publications may further configure this option to allow or prevent existing “Actual” information from being replaced when Production is ended on a submission.

**To Configure:** To allow Target publication information to be automatically copied to Actual publication information fields when production is ended, go to PolicyManager, and click the new *Configure Automatic Copy of Target to Actual Publication Information* link.

To allow Submission Target Publication Information to be copied to Actual Publication Information when Production is Ended or a Schedule Group is closed, select/check the “Copy Submission Target Publication Information to Submission Actual Publication Information” checkbox.

**Configure Automatic Copy of Target to Actual Publication Information**

Set/Check the 'Copy Submission Target Publication to Submission Actual Publication Information' box to have the system automatically copy a submission's Target Publication Information to its Actual Publication Information when production is ended on a submission, or when the Schedule Group to which the submission belongs is closed.

Select the radio button 'Do not overwrite existing values for Actual Publication Information' to skip the Target to Actual copy for any field where there is an existing Actual Publication value. Note: if there is no value in an Actual Publication Field, the Target value will be copied in.

Select the radio button 'Overwrite existing values for Actual Publication Information' to copy Target information for all fields into the matching Actual Information fields, overwriting any existing values.

When Production is Ended on a Submission or a Schedule Group is Closed:

Copy Submission Target Publication Information to Submission Actual Publication Information

Do not overwrite existing values for Actual Publication Information  
 Overwrite existing values for Actual Publication Information

When this box is selected/checked, the two Radio Button sub-options are enabled. The default option is “Do not overwrite existing values for Actual Publication Information”, but the option to allow overwriting is available for selection.



### Configure Automatic Copy of Target to Actual Publication Information

Set/Check the 'Copy Submission Target Publication to Submission Actual Publication Information' box to have the system automatically copy a submission's Target Publication Information to its Actual Publication Information when production is ended on a submission, or when the Schedule Group to which the submission belongs is closed.

Select the radio button 'Do not overwrite existing values for Actual Publication Information' to skip the Target to Actual copy for any field where there is an existing Actual Publication value. Note: if there is no value in an Actual Publication Field, the Target value will be copied in.

Select the radio button 'Overwrite existing values for Actual Publication Information' to copy Target information for all fields into the matching Actual information fields, overwriting any existing values.

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When Production is Ended on a Submission or a Schedule Group is Closed:

Copy Submission Target Publication Information to Submission Actual Publication Information

Do not overwrite existing values for Actual Publication Information

Overwrite existing values for Actual Publication Information

### Author Main Menu

Four Production related folders will appear on the main menu for Authors. These will only appear once the first Production Task has been assigned to the Author:

1. **Submissions in Production:** This folder gives the Author visibility to his submission(s) in progress, whether his or her task has been completed or whether he or she was not assigned a task.
2. **Current Task Assignments:** Lists all production tasks assigned to this Author. Authors must use this folder to complete production tasks and upload any files to the publication.
3. **Completed Production Task Assignments:** Lists all production tasks that this Author has completed. The Author can use this to review the progress of the submission, and any covering letter sent at the time of assignment.
4. **Submissions with Production Completed:** This folder gives the Author visibility to their submission(s) after production has been completed.

### Author Main Menu

[Alternate Contact Information](#)

[Unavailable Dates](#)

For additional help with your submission, please click [here](#) for the Author Tutorial.

**Production**

[Submissions in Production \(3\)](#)

[Current Task Assignments \(0\)](#)

**New Submissions**

[Submit New Manuscript](#)

[Submissions Sent Back to Author \(0\)](#)

[Incomplete Submissions \(1\)](#)

[Submissions Waiting for Author's Approval \(0\)](#)

[Submissions Being Processed \(3\)](#)



**Revisions**

- Submissions Needing Revision (0)
- Revisions Sent Back to Author (0)
- Incomplete Submissions Being Revised (0)
- Revisions Waiting for Author's Approval (0)
- Revisions Being Processed (1)
- Declined Revisions (0)

**Completed**

- Submissions with a Decision (1)
- Completed Production Task Assignments (0)
- Submissions with Production Completed (1)

**To Configure:** No configuration is necessary. Once a Production Task has been assigned, these folders will appear.

**Note:** At least one Production Task must be configured with “Can be Assigned to:” set to “Corresponding Author Only”. Otherwise, the Author cannot complete a task.

There is also an option to display Production Status and/or Target Volume/Issue in these folders. The Production Status displayed is the last (most recent) status designated to “show in history” in PolicyManager.

**Note:** “Send E-mail” and “Correspondence” are the only link displayed in the Action column. If the Author does not have RoleManager permission to “Send Ad Hoc E-mail” or “View Author Related Correspondence History”, no Action Links are displayed in these folders.

**Submissions in Production**

**Contents:** Listed below are one or more submissions you have authored that are currently in production.

Page: 1 of 1 (3 total submissions) Display 10 results per page.

| Action                        | Manuscript Number | Article Title                                | Production Status | Initial Date Submitted | Final Decision Date | Target Volume | Target Issue |
|-------------------------------|-------------------|--|-------------------|------------------------|---------------------|---------------|--------------|
| Correspondence<br>Send E-mail | DEMOCD-D-20-00015 | Waiver Test                                  | In Production     | Mar 18, 2020           | Mar 20, 2020        | 89            | 4            |
| Correspondence<br>Send E-mail | DEMOCD-D-20-00004 | Manuscript Title This is the Best Manuscript | In Production     | Jan 10, 2020           | Jan 15, 2020        | 1             | 1            |
| Correspondence<br>Send E-mail | DEMOCD-D-19-00023 | A Dance with Dinosaurs                       | In Production     | Oct 11, 2019           | Jan 08, 2020        | 1             | 1            |

Page: 1 of 1 (3 total submissions) Display 10 results per page.

[<< Author Main Menu](#)  
 You should use the free Adobe Reader 10 or later for best PDF Viewing results.

No configuration is required to see the Submissions in Production and Submissions with Production Completed folders. However, if you want Authors to see Production Status and/or Target Volume/Issue in these folders, you must edit the Author role in RoleManager and enable the permissions “ View Production Status” and/or “ View Target Volume/Issue”.


## Display Current Task Assignments Directly on Author Main Menu

There is an option to display the Current Task Assignments directly on the Author Main Menu. When configured, a 'Current Task Assignments' grid will display directly on the Author's Main Menu. If this is not configured, Authors must click the 'Current Task Assignments' link on the Author Main Menu to see their current assignments.



The screenshot shows the 'Author Main Menu' interface. At the top, there are links for 'Manuscript Services', 'Alternate Contact Information', and 'Unavailable Dates'. Below these is a link for the 'Author Tutorial'. A 'Production' tab is active, showing 'Submissions in Production (2)'. The 'Current Task Assignments' section contains a table with the following data:

| Action                                       | Task                  | Date Task Assigned | Date Task Due | Days Until Due | Manuscript Number | Article Title | Assigned By |
|--|-----------------------|--------------------|---------------|----------------|-------------------|---------------|-------------|
| Submit Task<br>Correspondence<br>Send E-mail | Task 6 - Author Proof | Nov 16, 2021       | Nov 16, 2021  | Due Today      |                   |               | mary mary   |

**To Configure:** Edit the Author role in RoleManager and enable the permission “ Display Current Task Assignments on Main Menu”.

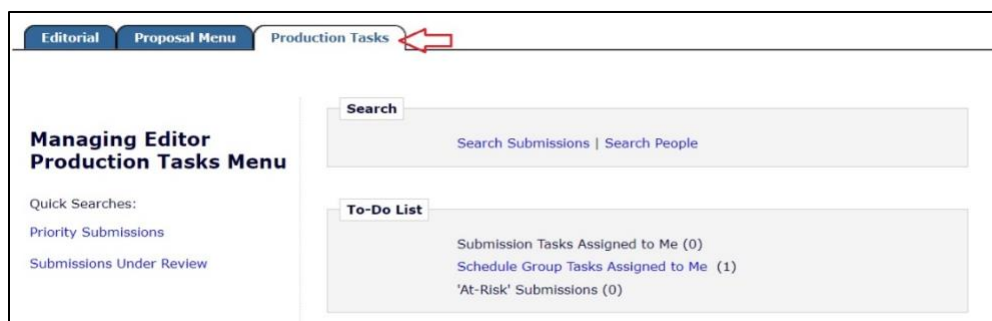
## Viewing and Editing Permissions

Several permissions exist for the purpose of allowing both Editors working on peer review and production staff to review production notes and history. These permissions, which control who can create or edit production-related information, include:

- **View Production Details** is the most important – anyone who can see the *Production Details* page will be able to modify some metadata, such as the production notes.
- **View Schedule Groups** allows users to see the details of the submissions assigned to each Schedule Group, and any associated pagination information.
- **View Production Status Grid** allows users to view an overview of the progress of many submissions through key Production Tasks. Publications can allow users to check progress of individual submissions by giving them this permission.
- **Change Corresponding Production Editor** allows publications to change the person associated with the submission as Corresponding Production Editor. Note that the associated permission “Serve as Corresponding Production Editor” must be set for at least one role and more than one user must be associated with that role for this to be useful.
- **Edit Submission Target Online Publication Date** allows users to set a target online publication date for an individual submission. Note that users with this permission are likely to also need the “Manage Schedule Groups” permission, as that allows them to set target Online and Print Publication Dates for the Schedule Group.
- **Override Submission Production Task Due Dates** allows users to change the date an individual assignment is due. Publications should consider enabling this for any user who can assign a Production Task unless they wish to limit users’ ability to delay the schedule.

## Production Tasks Menu

Editors and Publishers with access to production task permissions will see a “Production Tasks” menu tab on their main page.



**To Configure:** To enable the production tracking features, please contact an Account Coordinator to activate Produxion Manager. Once this has been enabled, RoleManager is used to enable one or more of the Production Task-related permissions.

Several key permissions define which links will appear in the Production Tasks menu:

- **View All Submissions in Production** displays the View All Submissions in Production and View All Production Tasks with Authors folders. It also affects the options available when viewing the Production Status Grid.
- **View Production Status Grid** displays the Production Status Grid from the Production Tasks Main Menu plus additional links from each production tracking page.
- **Manage Schedule Groups** displays the links to the Manage Schedule Groups and Closed Schedule Groups. It also displays the Add Schedule Group link, which allows a user to create a new Schedule Group.
- **Send Production Reminders** displays the links to the Submission Tasks Reminder Report and Scheduled Group Tasks Reminder Report, which allows users to pull a list of overdue production tasks and send reminder emails.
- **Assign Production Tasks** displays the Production Tasks I Have Assigned folder once at least one Production Task has been assigned.
- **Receive Production Tasks** displays the Production Tasks Assigned to Me folder, which lists all open Production Tasks yet to be completed for a user.
- **Create Automated Submission Tasks Reminders** shows the link to the Automated Submission Tasks Reminder Report, which allows users to create a report to send out automatic reminder emails after a specified period.
- **Create Automated Schedule Group Tasks Reminders** shows the link to the Automated Schedule Group Tasks Reminder Report, which allows users to create a report to send out automatic reminder emails after a specified period.
- **Run Production Task Assignment Totals Report** shows the link to the Editor/Publisher Assignment Totals by Task Type Report, which provides a count of the Submission Production Tasks assigned to users in a specified period, broken down by Production Task type, to better assess their workload.

### Setting Production Task Menu as Default

Publications can also make this the default main menu for users who will deal primarily or exclusively with production tasks and who do not need to work with the main Editorial menu. Links to the main Editorial menu will remain on each production task page and the Editorial menu tab will remain available, so this will not prevent access to this menu.

**To Configure:** Use the Search People link to locate the user and then click on their name to edit their settings. For the Default Login Menu option, select Production Menu from the dropdown list.

### Production Initiated – No Tasks Assigned folder

The Production Initiated - No Tasks Assigned folder is available on the Production Tasks Menu for Editors and Publishers. This folder is displayed in the “Overview” section of the Production Tasks Menu.

#### Editor Production Tasks Menu

The screenshot shows the 'Editor Production Tasks Menu' interface. At the top, there are three tabs: 'Editorial', 'Proposal Menu', and 'Production Tasks'. The 'Production Tasks' tab is active. On the left side, the title 'Production Editor Production Tasks Menu' is displayed. The main content area is divided into three sections: 'Search', 'To-Do List', and 'Overview'. The 'Search' section contains links for 'Search Submissions' and 'Search People'. The 'To-Do List' section lists 'Submission Tasks Assigned to Me (2)', 'Schedule Group Tasks Assigned to Me (0)', and ''At-Risk' Submissions (0)'. The 'Overview' section lists 'Production Initiated – No Tasks Assigned (1)', 'View All Submissions in Production (11)', 'View All Production Tasks With Authors (1)', and 'Production Status Grid'. The 'Production Initiated – No Tasks Assigned (1)' link is highlighted with a red box.

#### Publisher Production Tasks Menu:

The screenshot shows the 'Publisher Production Tasks Menu' interface. At the top, there are two tabs: 'Main Menu' and 'Production Tasks'. The 'Production Tasks' tab is active. On the left side, the title 'Publisher Production Tasks Menu' is displayed. The main content area is divided into two sections: 'To-Do List' and 'Overview'. The 'To-Do List' section lists 'Submission Tasks Assigned to Me (0)' and 'Schedule Group Tasks Assigned to Me (0)'. The 'Overview' section lists 'Production Initiated – No Tasks Assigned (1)', 'Submission Tasks I have Assigned (0)', 'View All Submissions in Production (11)', 'View All Production Tasks With Authors (1)', and 'Production Status Grid'. The 'Production Initiated – No Tasks Assigned (1)' link is highlighted with a red box.

The Production Initiated – No Tasks Assigned folder displays submissions where production has been initiated but no tasks have been assigned or all tasks have been canceled. Submissions displayed here are still actively in production (i.e., the 'End Production' link has not been clicked or the Schedule Group to which the submission has been assigned is not closed).

Contents may include submissions entered via the “Create Submission” button in PM or submissions entered in EM that have gone through the editorial process and on which production has been initiated without an initial task being assigned. The folder contains Action Links allowing the user to assign a submission Production Task, view Details about the submission, or edit the submission.

**Note:** *If there are no submissions in the folder, the folder name still displays as a label (not a link) with a (0) after the name.*

### **Submission Tasks Assigned to Me**

This folder shows the user any Production Tasks that they been assigned to work on. Use this folder to:

- Review assigned task lists and due dates.
- Download any files made available as part of a specific task.
- Submit a task (complete the task, optionally uploading files to the publication in the process).

Users may also carry out additional actions, such as assigning other tasks or viewing Production Details, depending on the permissions that have been enabled for their Editor/Publisher role.

There are two views available for this folder. The folder will initially list all individual assignments and users may see a particular submission multiple times if more than one assignment is related to it. If a user the permission “View Production Status Grid”, the “Switch to Status Grid View” link will show all submissions in this view. This provides a table of submissions and assigned tasks to allow users to check the status of all related submissions.

**To Configure:** Enable the RoleManager permission “Receive Production Task” to display this link for any role that will work on production tasks. At least one Production Task must also be configured so that it can be assigned to users with that role. Ensure that the role has been assigned to at least one user.

Enable the “View Production Status Grid” RoleManager permission to allow users to switch to the “Status Grid View”, but note that this will give them access to details of all production task assignments for a submission.

### **Submission Tasks I Have Assigned**

This folder shows the currently logged-in user details of any Submission Production Tasks they have assigned someone else to work on. Use this folder to cancel a Submission Production Task assignment and send a notification to the assignee that this has occurred.

Users may also carry out additional actions, such as assigning other tasks or viewing Production Details page depending on permissions.

**To Configure:** Enable the RoleManager permission “Assign Submission Production Task” to display this link for any role that will assign tasks to other users. At least one Submission Production Task must also be configured so that it can be assigned by users with that role. Ensure the role has been assigned to at least one user.

### **Must Be Started By Date and “At Risk” Folder for Production Tracking**

Production Tasks can be configured to calculate a due date on assignment based on several options, such as Number of Days After Assignment, Number of Days prior to Schedule Group

Target Publication Date, etc. However, these calculations are used at the point of assignment only to calculate the due date for the current Task Assignment and to warn of missed deadlines.

The 'Must Start By Date' and 'At Risk' folder functionality uses the same lead times to:

- Calculate deadlines in advance for important tasks.
- Provide visibility to the dates in the status grid.
- Compare individual production task assignments against these master dates.
- Automatically list all submissions which are at risk of missing a target publication date in a "At-Risk' Submissions" folder.

To use this functionality, publications must identify the Production Task Types they wish to include in these "Must Start Date" and "At Risk" calculations. PM will then build a master schedule for each submission behind the scenes, calculating new "Must Start By" and "Must End By" dates for each selected Production Task Type.

The Production Status Grid shows scheduling information for those Production Tasks configured to display the "Must Start:" date and schedule "Slip". Where no assignment has been made for a Production Task Type configured to display the "Must Start:" date, the Production Status Grid will show a "Must Start:" date for that task. The warning is color coded, displaying green if the date is in the future, amber if the date is today's date, and red if the date has passed. If the date has passed, then the column will also show a "Slip:" figure indicating the number of days past due for this task.

**Note:** *This will **not** affect existing submissions. Only submissions put into production **after** the change in configuration will have a schedule built for them that incorporates the newly configured tasks. You can force the system to rebuild the schedule for a submission by Ending Production on the submission and then returning the submission to production.*

If a production task has been assigned, the Must Start date is replaced with the existing Submitted, Due, or Cancelled information. The system still tracks whether that task assignment is slipping against the scheduled dates for that task type and will now also display a Slip figure indicating the number of days late the task is running.

- If the task is open (assigned and not submitted), the Slip figure will be based on the larger of the number of days later than the Must End By date the Due date currently is or the number of days past the Must End By date the current date is if later than the Due date.
- If the task has been submitted, the Slip figure will be based on the number of days later than the Must End By date the task was completed by.
- Canceled tasks do not contribute to the schedule slip.

An 'At-Risk' Submissions folder is in the main Production Tasks Menu. This folder is displayed for Editor and Publisher Roles with the RoleManager permission to "View At-Risk Submissions".

The At Risk Submissions folder is based on the concept of an overall Submission Slip figure. When calculating this, the system takes into consideration all the individual Slip figures calculated as described above.



All Production Task Types configured with “Include this task in 'At Risk' and 'Must Start By' date display” setting contribute to this calculation, not just those that appear on the Production Status Grid. This is important to note, as users can keep the Production Status Grid simple but still monitor other tasks and use them to trigger a warning if they threaten the schedule.

Users may also see submissions in the ‘At-Risk’ Submissions folder where no Slip dates appear on the Status Grid.

The total Submission Slip is taken to be the largest of:

- The last completed production task (only the latest task is counted, so users can recover from early task slips by completing subsequent tasks early).
- The largest individual slip figure from any open production task assignments.
- The largest slip figure calculated for Production Task types with no associated assignments, where the current date is past the Must Start By date for that task.

**Note:** *The Must Start By and Must End By dates, and the associated task Slip and Schedule Slip figures rely on lead times derived from Submission Target Online Publication Date, Schedule Group Target Online Publication Date, and Schedule Group Target Publication Date.*

If the submission is not assigned to a schedule group or does not have a Submission Target Online Publication date, then no Slip figures can be calculated, and the submission cannot be put At Risk. This is because the system has no date to schedule to.

Schedule slip may be handled in a variety of ways, if appropriate:

- For individual tasks, bring the Due Date forward on or after assignment.
- For a specific submission, edit the Submission’s Target Online Publication Date (defer online publication of that submission).
- For a specific submission, reassign it to a later Schedule Group.
- For all submissions in a Schedule Group, edit the Schedule Group’s target Online Publication Date or Target Publication Date (defer publication of the issue).

**To Configure:** Go to PolicyManager and click Configure Production Tasks to view a list of the Production Tasks and identify the most important tasks that should be included in forward scheduling. These are likely to be the tasks already selected to display on the Production Status Grid.

For each type of Production Task to be included in scheduling calculations, check the “Include this task in 'At Risk' and 'Must Start By' date display” configuration option.

Publications must also set at least one of the “Number of Days Prior to ...” Due Date options. It is recommended that the “Number of Days After Assignment Date” option also be set.

If more than one of the “Number of Days Prior to ...” options is selected, the system will calculate the earliest Must End By due date based on all checked “Number of Days prior ...” options. It will then add the “Number of Days after Assignment” option to calculate the associated Must Start By date.



**Example 1:** In the example below, let's assume that the Schedule Group Target publication Date is June 30<sup>th</sup>. Twenty days prior to June 30<sup>th</sup> is June 10<sup>th</sup>, so June 10<sup>th</sup> is the Must End By date.

We know that the task should take five days to complete, so the Must Start By date is five days before June 10<sup>th</sup>, meaning June 5<sup>th</sup>.

**Note:** *If the publication is using Working Days to calculate due dates, these calculations would be based on working days rather than calendar days.*

If the Author hasn't started working on the task by June 5<sup>th</sup> or hasn't completed the task by June 10<sup>th</sup>, the submission is considered At Risk.

**Example 2:** Building on the previous example, let's assume the Submission Target Online Publication Date is June 15<sup>th</sup> (Schedule Group Target Publication Date is still June 30<sup>th</sup>). Now, the Must End By date would be May 16<sup>th</sup> (30 days prior to June 15<sup>th</sup>), because the system takes the earliest of dates. The Must Start By date is five days before May 16<sup>th</sup>, meaning May 11<sup>th</sup>.

**Note:** *If the task types to be included in Must Start By date calculations are defined, any user who can see the Production Status Grid will see the Must Start By dates and Slip information.*

**Note:** *Some Production Task Types may be configured with "Include this task in 'At Risk' and 'Must Start By' date display" setting without the the "Show Task in Production Status Grid" option enabled. The system will continue to calculate the above schedule Slip figures for these tasks, but it will not display them on the Production Status Grid. They will be used to determine whether the submission is At Risk.*

To grant Editor and Publisher Roles access to the 'At-Risk' Submissions folder, go to RoleManager and enable the "View At-Risk Submissions" permission.

### **View All Submissions in Production**

This folder lists all submissions with the status "In Production" or "Returned to Production", i.e., any submissions that are available for production tasks. Use this folder for a quick overview of submissions in production, as this table may be sorted by any column.

Users can access general Production Task-related information and carry out key Actions from this view, including Assign Production Tasks and End Production.

**To Configure:** Enable the RoleManager permission "View All Submissions in Production". The Action Links that appear will depend on which other Production Manager permissions are enabled for each role. Note that the Schedule Group name listed in the main table of submissions will appear as a link to the details of the Schedule Group if a user has either of the permissions "View Schedule Groups" or "Manage Schedule Groups" enabled.

### **View All Production Tasks with Authors**

This folder lists all tasks that have been assigned to an Author as well as who assigned the task to them. Use this folder to cancel a Production Task assignment and send a notification to the Author.

Users may also carry out additional actions, such as assigning other tasks or viewing Production Details depending on their permissions.

**To Configure:** Enable the RoleManager permission “View All Submissions in Production”.

### Production Status Grid

Use this folder to review the progress of all submissions throughout the production process. It displays the status of key Submission Production Tasks for listed submissions.

The Production Status Grid allows the user to:

1. Freeze columns
2. Reorder columns (i.e., move columns around)
3. Hide columns
4. Resize columns
5. Download the grid

| Action   | Manuscript Number | Author Name                     | Article Title                                   | Production Status | Production Notes                               | Date Production Initiated | Submission Target Online Date | Schedule Group | Task 1 - Intake |
|--|-------------------|---------------------------------|---|-------------------|--|---------------------------|-------------------------------|----------------|-----------------|
| <ul style="list-style-type: none"> <li>Production Details</li> <li>History</li> <li>Transmittal Form</li> <li>Assign Production Task</li> <li>Assign to Schedule Group</li> <li>File Inventory</li> <li>End Production</li> <li>Send E-mail</li> <li>Linked Submissions</li> </ul> | DEMOCD-D-19-00009 | Edwin Expert<br>(UNITED STATES) | A Brief History of the Entire Universe and More |                   | No Production Notes have been entered.<br>Edit | Jun 29, 2020              |                               |                |                 |
| <ul style="list-style-type: none"> <li>Production Details</li> <li>History</li> <li>Transmittal Form</li> <li>Assign Production Task</li> <li>Change Schedule Group</li> </ul>   | DEMOCD-D-19-00023 | mary mary<br>(UNITED STATES)    | A Dance with Dinosaurs                          |                   | No Production Notes have been entered.         | Jun 29, 2020              |                               | SG Page Test   |                 |

The key feature of this page in either view is the list of Submission Production Tasks listed across the grid, between the Date Production Started and Submission Target Online Publication Dates.

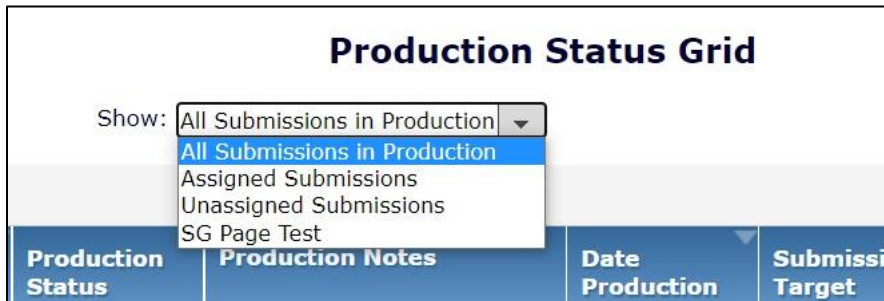
The order of these fields can be changed in the Grid Options by clicking the icon. An Editor/Publisher can choose the key Submission Production Tasks that appear in this grid for them. Changes made here are configurable by user and will not affect how this grid display for other users. The customized settings are saved in the database, so the next time the user logs in (from the same computer or a different computer), the page will display the same way.

The grid will display the Must Start By dates and Slip figures for Production Task Types that are so configured.

The grid will initially show all submissions In Production, but it can be further filtered to present:

- Submissions not currently assigned to a Schedule Group.
- All submissions assigned to any Schedule Group.
- Submissions assigned to a specific Schedule Group.

A user can filter by this information using the “Show” dropdown menu at the top of the grid.



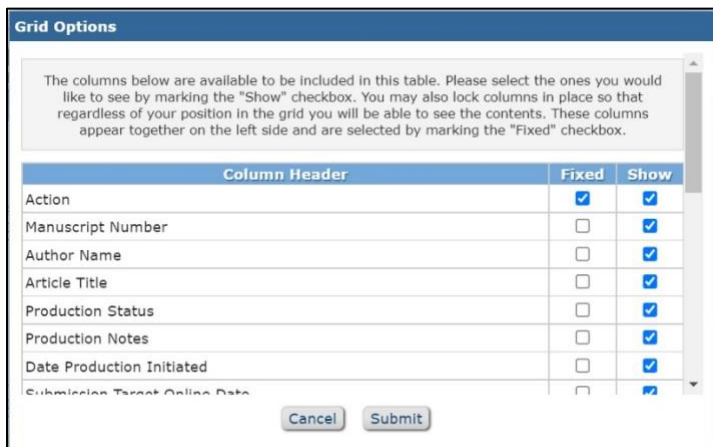
Users can access general Production Task-related information and carry out key Actions from this view.

**To Configure:** Only specified tasks will appear on the grid. To configure a task to appear on the Production Status Grid, go to PolicyManager and click the “Configure Submission Production Tasks” link under the ProduXion Manager section. On this page, select and edit a Submission Production Task. Check the “Show Task in Production Status Grid” setting to have the task appear in the grid.

To allow users with a particular role to view the Production Status Grid, enable the RoleManager permission “View Production Status Grid”.

**Setting Display via Grid Options:**

The Grid Options link opens a pop-up box where users may customize more options for the Interactive Grid display. The Grid Options have settings that allow the user to Hide Columns, Freeze Columns, and designate how many columns to freeze



If the user does not make any changes, all columns are displayed (not hidden) and one column (the Action column) is frozen. The user can make changes and click the Submit button. The Production Status Grid will reload (a spinning circle will display) and the user's changes will then be active.

### Freezing a Column:

Columns can be frozen like the Freeze Panes feature in Excel. The default setting is to have one column (the Action column) frozen, but users may choose to have additional or different columns frozen.

When columns are frozen, the frozen columns will always display on the left side of the grid. The columns to the right of the frozen columns can be scrolled while the frozen columns retain their position. This is helpful when there are many Submission Production Tasks that the user wishes to review, allowing them to still display identifying information on the left, such as DOI or Manuscript Number.

**Manuscript Number Column**

The screenshot shows the 'Production Status Grid' interface. The first column, 'Action', is highlighted in blue and is frozen. A yellow callout box points to this column with the text: 'Column 1 is "frozen" - only columns to the right of the Action Column can be scrolled.' The grid displays two rows of submission data. The first row is partially visible, and the second row shows details for 'A Dance with Dinosaurs'.

| Action   | Manuscript Number | Author Name               | Article Title          | Production States | Production Notes                               | Date Production Initiated | Submission Target Online Date | Schedule Group | Task 1 - Intake | Task 2 - Conversion | Task 3 - Copyedit | Task 4 - CE Review |
|--|-------------------|---------------------------|------------------------|-------------------|--|---------------------------|-------------------------------|----------------|-----------------|---------------------|-------------------|--------------------|
| Production Details<br>History<br>Transmittal Form<br>Assign Production Task<br>Assign to Schedule Group<br>File Inventory<br>End Production<br>Send E-mail<br>Linked Submissions | DEMOC             |                           |                        |                   |  |                           |                               |                |                 |                     |                   |                    |
| Production Details<br>History<br>Transmittal Form<br>Assign Production Task<br>Change Schedule Group<br>File Inventory<br>Send E-mail<br>Linked Submissions                      | DEMOCDD-19-00023  | Mary Mary (UNITED STATES) | A Dance with Dinosaurs |                   | No Production Notes have been entered.<br>Edit | Jun 29, 2020              |                               | SG Page Test   |                 |                     |                   |                    |

After scrolling, the Date Production Initiated column is displayed next to the Action column. The Action column is still frozen.

The screenshot shows the 'Production Status Grid' after scrolling. The 'Action' column remains frozen on the left. The 'Date Production Initiated' column is now visible next to it. The grid displays two rows of submission data. The first row shows 'Submitted Jun 29, 2020' and 'Epidemiology Section'. The second row shows 'Due Jul 09, 2020' and 'Basic Science Section'.

| Action   | Date Production Initiated | Submission Target Online Date | Schedule Group | Task 1 - Intake | Task 2 - Conversion | Task 3 - Copyedit | Task 4 - CE Review | Task 5 - Composition | Task 6 - Author Proof | Task 7 - Final Proof | SG Pages Test  | Section Category      | Article Type   | Target TOC Position |
|--|---------------------------|-------------------------------|----------------|-----------------|---------------------|-------------------|--------------------|----------------------|-----------------------|----------------------|--|-----------------------|----------------|---------------------|
| Production Details<br>History<br>Transmittal Form<br>Assign Production Task<br>Assign to Schedule Group<br>File Inventory<br>End Production<br>Send E-mail<br>Linked Submissions | Jun 29, 2020              |                               |                |                 |                     |                   |                    |                      |                       |                      | Submitted Jun 29, 2020<br>Christine Donovan                                      | Epidemiology Section  | Original Study |                     |
| Production Details<br>History<br>Transmittal Form<br>Assign Production Task<br>Change Schedule Group<br>File Inventory<br>Send E-mail<br>Linked Submissions                      | Jun 29, 2020              |                               | SG Page Test   |                 |                     |                   |                    |                      |                       |                      | Due Jul 09, 2020<br>Dwight Deputy<br>Submitted Jun 29, 2020<br>Christine Donovan | Basic Science Section | Original Study | 3                   |

### Moving a Column:

Columns can be moved in the Interactive View by dragging and dropping the column headers.

**Note:** An unfrozen column cannot be dragged and dropped into the Frozen column area. If the user has three columns frozen and wants to insert an unfrozen column into the second position, they should first set this column as frozen and then drag it to the desired position.

### To Drag and Drop a Column:

On a PC, click the left mouse button in a column header, then, without letting up on the left mouse button, drag the column to the desired position and release the mouse button.

On a Mac, click and hold the mouse button while dragging the column.

While dragging the column, a box will show the title of the column the user is moving, and two vertical arrows will indicate where the column is currently set to be moved.



The screenshot shows a web application interface titled "Production Status Grid". At the top right, there is a "Show:" dropdown menu set to "All Submissions in Production". Below this, a page indicator shows "Page: 1 of 1 (11 total submissions)" and a "1" in a box. The main table has the following columns: "Action", "Manuscript Number", "Author Name", "Article Title", "Production Status", "Production Notes", "Date Production Initiated", and "Submitted On". The "Article Title" column header is highlighted in yellow. The first row of data contains: "Production Details" (with a dropdown arrow and a red X icon), "DEMOC-D-19-00009", "Edwin Expert (UNITED STATES)", "A Brief History of the Entire Universe and More", "No Production Notes have been entered. Edit", and "Jun 29, 2020".

### Resizing a Column:

As a user would in Excel, hover the cursor over the line between the two columns. A horizontal arrow will appear.

On a PC, hold down the left mouse button and drag the bar to the left or right. The entire column will resize. If a user hovers their cursor over the line between two columns, they will see a note that they can drag to resize the column or double click to reset the column's width.

### Sorting by a Column:

The Production Status Grid supports a sort on one column at a time. The columns that can be used for sorting have a small gray triangle in the upper right corner. To sort by a column, click the triangle for that column until it is facing up (ascending order) or down (descending order). The triangle for the column being sorted by will appear yellow.

| Production Status Grid   |                   |                                   |                      |                   |  |                           |
|--|-------------------|-----------------------------------|----------------------|-------------------|--|---------------------------|
| Action   | Manuscript Number | Author Name                       | Article Title        | Production Status | Production Notes   | Date Production Initiated |
| <ul style="list-style-type: none"> <li>Production Details ▾</li> <li>History</li> <li>Transmittal Form</li> <li>Assign Production Task</li> <li>Assign to Schedule Group</li> <li>File Inventory</li> <li>End Production</li> <li>Send E-mail</li> <li>Linked Submissions</li> </ul> | DEMOCD-D-20-00031 | Allan Author ▾<br>(UNITED STATES) | Edit Submission Test |                   | No Production Notes have been entered.<br><a href="#">Edit</a> | Sep 01, 2020              |
| <ul style="list-style-type: none"> <li>Production Details ▾</li> <li>History</li> <li>Transmittal Form</li> <li>Assign Production Task</li> <li>Assign to Schedule Group</li> <li>File Inventory</li> </ul>  | DEMOCD-D-20-00017 | Naomi Pierce ▾<br>(UNITED STATES) | CS Test II           |                   | No Production Notes have been entered.<br><a href="#">Edit</a> | Mar 23, 2020              |

If a triangle does not appear in the column header, that column is not sortable. For example, Production Notes and Production Tasks are not sortable.

Any sort that the user may apply to the Production Status Grid will be retained when the user leaves the grid and subsequently returns to the page.

### Production Status Grid Saved Settings:

All customizations made to the grid by the logged-in user are saved in the database for that user. The next time that user uses the grid, the custom settings are displayed. For example, if an Editor narrowed the Article Type column when viewing the Production Status Grid for the Schedule Group “Spring Issue”, when that Editor views the Schedule Group “Summer Issue”, the Article Type column will have the same narrower width. This applies to all customizations, including dragged and dropped columns and column sorts.

**Note:** Since the Production Status Grid settings are saved in the database, if a proxy user changes another user’s page display, the page display is saved in the database and will be the default page display the next time that user visits the page. For example, if Amelia Editor proxies for Ellie Editor to set up Ellie’s grid for her, Ellie will see the new display the next time she visits the page.

### Manage Schedule Groups

This folder lists all Schedule Groups that are currently active. A Schedule Group is roughly equivalent to an issue, although it can be used to group submissions together for other purposes. If a user wants to add an Issue to the system, it would be added as a new Schedule Group, and pagination targets would be set. Users can also create Schedule Groups to handle batches of submissions for other purposes, such as a batch for uploading to a website. However, a submission can only belong to one schedule group at a time.

Use this folder to:

- Add new Schedule Groups (i.e., add issues).
- Copy a Schedule Group.
- Add a Header into a Schedule Group Table of Contents.
- Set Target Publication Dates plus target page and content budgets for a group.
- Assign submissions to a specific Schedule Group.
- Move submissions between Schedule Groups.
- Associate a Proposal with a Schedule Group.

- Modify existing Schedule Group settings.
- Close Schedule Groups to move them out of production.
- Assign or batch assign a production task.

**To Configure:** Only specified users can manage Schedule Groups. To enable this permission for users with a specific role, go to RoleManager, Editor Role or Publisher Role, select the role, and check the “Manage Schedule Groups” permission.

The related permission “View Schedule Group Details” allows users to check a Schedule Group’s details whenever they see the group’s name. To enable this, go to RoleManager, Editor Role or Publisher Role, select a role, and check this permission.

### **Add Schedule Group**

This allows users to create a new schedule group, for example to add a new issue. This Action Link is also available on the main Production Tasks menu.

**To Configure:** Go to RoleManager, Editor Role or Publisher Role, select the role, and enable the “Manage Schedule Groups” permission.

### **Closed Schedule Groups**

This folder lists all Schedule Groups that have been previously closed, such as issues that have been published. Schedule Groups must be manually closed to remove them from production and into this folder.

Use this folder to re-open closed Schedule Groups or review published material.

**To Configure:** Go to RoleManager, Editor Role or Publisher Role, select the role, and enable the “Manage Schedule Groups” permission.

### **View All Submissions with Production Completed**

This folder lists all submissions for which production has been completed, and therefore has the production status Production Completed.

Use this folder to return submissions to production and access data and files for completed submissions.

**Note:** *Submissions must be manually closed to move them from production into this folder. This can be done for individual submissions, but please note that all submissions assigned to a Schedule Group will be closed and moved into this folder when the associated Schedule Group is closed.*

**To Configure:** Enable the RoleManager permission “View All Submissions in Production”.

### **Submission Tasks Reminder Report and Schedule Group Task Reminder Report**

These reports allow users to create a list of tasks that may be overdue, nearly due, or which have been in progress for a specified time. Reminder letters can be generated from the list. The reporting process spans several pages.

The first page allows users to define a report; use the options here to limit reports to specific sets of submissions, tasks, or assignees, and to define the date range for reminders.

Use “Select Production Task” to limit the report run to just one type of task.



Use “Select Schedule Group” to limit the report run to tasks associated with submissions that have been assigned to one schedule group, for example to chase up tasks for a specific issue.

Use the “Assigned to” check boxes to limit the report to tasks assigned to selected types of users.

Choose one of the “Show open Production Tasks...” settings to base the report on. For example, choose the option “Show open Production Tasks that are [\_\_] days past their due date.” and set the figure to “0” to list all submissions due today.

For the Submission Task Reminder Report, it is possible to further limit the results to specific Article Types and section/category settings.

After a user submits a search, they are presented with a list of task assignments matching the search that was just set up and specific assignments may be selected. Click the “Send Reminders” button to send reminder emails, as per the normal Editorial Manager reminder process. This can only be done if the publication has already set up one or more reminder letters and assigned them to the “Production Reminder” letter family.

**To Configure:** To allow users with a specific role to run the report, go to RoleManager, Editor Role or Publisher Role, select the role, and enable the permission “Send Production Reminders”.

Before reminder letters for Production Tasks can be generated, publications need to create standard reminder templates. Go to PolicyManager and select “Edit Letters”. Click the “Add New Letter” button to create a new template and select “Production Reminder” as the letter family.

### **Automated Submission Tasks Reminder Report**

Clicking the Automated Submission Task Reminders Report link from the Production Tasks Menu brings the user to the Automated Submission Task Reminder Reports interface. Like other automated reports in the EM/PM system, criteria for a report can be defined and saved.

The Reminder Type section allows the Report creator to refine report results:

- [X] days Outstanding Submission Production Tasks – applies to Submission Production Tasks that were assigned [X] days ago and are still open. Eligible users with open Tasks will not receive a reminder every single day after [X] days have elapsed but will receive a single reminder after [X] days have passed.
- [X] days Before Selected Date Type – applies to Submission Production tasks that are [X] days before the selected Date Type. Users assigned a Submission Production Task but have not completed it by [X] days before the selected Date Type will receive a reminder.
- [X] days After Selected Date Type – applies to Submission Production Tasks that are [X] days after the selected Date Type. Users assigned a Submission Production Task but have not completed it yet after the elapsed amount of time will receive a reminder.

The Date Type is configured below the Reminder Type section. The selected Date Type can be used to configure a Before or After Reminder Type. Report creators may choose to calculate the report based on Production Task Due Date, Submission Target Online Publication Date, Schedule Group Target Online Publication Date, or Schedule Group Target Publication Date. The Report results may be further restricted to a single Submission Production Task or all Production Tasks, a Schedule Group or all Schedule Groups, specific

Task recipients, Article Type(s), or Section/Category. All letters in the Production Reminder letter family are available for selection in the Reminder Letter drop down list.

**Note:** *Opting to not select any criteria in a multi-selector box (Assigned To, Article Type, and Section/Category) will run the Report against all eligible Roles, Article Types, and/or Sections Categories.*

Once saved, a user will have access to their Automated Submission Task Reminder Report in the Saved Automated Reminders section at the bottom of the page. Clicking the pencil icon refreshes the page so the user may update the criteria of the report. Clicking the trash can icon removes the report. The order of the reports in the Saved Reports section may be changed by dragging and dropping the record to the desired location.

**To Configure:** Enable the Create Automated Submission Tasks Reminders permission in Editor or Publisher RoleManager. Additionally, letters must be configured in the Production Reminder letter family in the Edit Letters section of PolicyManager.

### **Schedule Group Tasks Reminder Report**

Clicking Automated Schedule Group Tasks Reminders Report link from the Production Tasks main menu brings the user to the new Automated Schedule Group Task Reminder Reports interface.

The Reminder Types section allows the report creator to refine Report results in the following ways:

- [X] days Outstanding Schedule Group Tasks - applies to Schedule Group Production Tasks that were assigned [X] days ago and are still open. Eligible users with open Tasks will not receive a reminder every single day after [X] days have elapsed, but will receive a single exactly after [X] days have passed
- [X] days Before Selected Date Type- applies to Schedule Group Production tasks that are [X] days before the selected Date Type. Users assigned a Schedule Group Production Task but have not completed it by [X] days before the selected Date Type will receive a reminder.
- [X] days After Selected Date Type- applies to Schedule Group Production Tasks that are [X] days after the selected Date Type. Users assigned a Schedule Group Production Task but have not completed it yet after the elapsed amount of time will receive a reminder.

The Date Type is configured below the Reminder Type section. The selected Date Type can be used to configure a Before or After Reminder Type. Report creators may choose to calculate the report based on Schedule Group Production Task Due Date, Schedule Group Target Online Publication Date, or Schedule Group Target Publication Date.

The Report results may be further restricted to a single Schedule Group Production Task or all Production Tasks, a single Schedule Group or all Schedule Groups, or specific Task recipient Roles. All letters in the Production Reminder letter family are available for selection in the Reminder Letter drop down list.

**Note:** *Not selecting any Roles in the Assigned To selector box will run the report against all eligible Roles.*

Once saved, a user will have access to their Automated Schedule Group Task Reminder Report in the Saved Automated Reminders section at the bottom of the page. Clicking the pencil icon refreshes the page so the user may update the criteria of the report. Clicking the trash can icon removes the report. The order of the reports in the Saved Reports section may be changed by dragging and dropping the record to the desired location.

**To Configure:** Create Automated Schedule Group Tasks Reminders permission(s) must be enabled for in the Role's Editor or Publisher RoleManager. To create scheduled reminders, one or more letters must be configured in the Production Reminder letter family in the Edit Letters section of PolicyManager.

### **Editor/Publisher Assignment Totals by Task Type Report**

The Editor/Publisher Assignment Totals by Task Type Report provides a count of the production tasks assigned to users in a specified period, broken down by Production Task type, to better assess their workload.

To run this report, click the "Editor/Publishers Assignment Totals by Task Type Report" link under the ProduXion Manager Reports header on the Reports Menu.

The next step is to specify selection criteria. This page includes many of the standard report options, including selection of date range, user role, article type and section/category. There are also several criteria options unique to this report:

- Use Date Assigned or Date Submitted:
  - Use Assignment dates when searching – Selecting this option will return results based on Production Task Start date.
  - Use Completion (or Cancellation, if used) dates when searching - Selecting this option will return results based on Production Task Completion date, or Cancellation date if the "Include Cancelled Tasks" option is set.
- Select Production Task Type – Limit the results to one, some, or all the (not hidden) Production Tasks that are configured with the "Can be Assigned to:" setting set to "Selected Editor/Publisher Roles only".
- Include Cancelled Tasks – If this box is checked, tasks that were subsequently cancelled will be incorporated into the totals in addition to completed tasks.
  - If the user has selected "Use Assignment Dates when searching", this is based on the assignment date of the cancelled or completed task.
  - If the user has selected "Use Completion (or Cancellation, if used) dates when searching", this is based on the cancellation date for cancelled tasks, or the submission date for completed tasks.

**Note:** *If a user does not explicitly select any Editor Roles, Publisher Roles, Article Types, Production Task Types, or Sections/Categories, the report will return results for all Editor Roles, all Publisher Roles, all Article Types, all Production Task Types, and all Sections/Categories.*

**Note:** *The Editor Role and Publisher Role selection boxes list only the users with the permission "Receive Production Tasks" enabled.*

The main body of the report results contains a series of summary tables. Each table summarizes the data associated with a single Production Task Type (i.e., Format Manuscript, Copy Editing, etc.). The Task Name is displayed as a sub-heading above the table.

Each row lists the totals for a specific combination of user and role associated with the task assignment. Editors and Publishers appear together in the same table. As this is the role that was associated with the task, it is possible for a specific user to appear twice – once with an Editor role, once with a Publisher role. Names are shown as links to the standard *'People Information'* page for that person. A column is added to the data area for each Article Type.

**To Configure:** No configuration is required. However, the user must have Editor RoleManager permission to “Produce Reports”.

### **Search Submissions/Search People**

These are the same as the Search links on the main Editorial Menu. With Production Tasks enabled, the *Search Submissions* page is enhanced:

- The DOI has been added to the Search Criteria and can appear in the search results if it has been configured as a selected identifier as described above.
- Production-Task specific links are added to the Action column, based on current permissions.
- The Advanced Criteria have been enhanced to allow users to filter searches according to production status. If a submission that is known to be in production cannot be found, check these criteria.
- Links back to the main *Production Tasks Menu* pages have been added.

The Advanced Criteria “Include only submissions which are currently in production” limits searches to submissions with the production status In Production or Returned to Production. With the sub criteria “Also include submissions where production has ended” turned on, the search will also include submissions with the production statuses Production Completed or Production Cancelled.

The Advanced Criteria “Include only submissions where production has ended” limits searches to submissions with the production statuses Production Completed or Production Cancelled.

**To Configure:** Selecting the normal search permissions in RoleManager will make the Search links available on the Production Tracking menu as well. Searching can only be enabled for Editor Roles.

### **Action Links**

As with Editorial Manager, submissions are processed by using Action Links associated with individual submissions within a Production Tasks Menu folder. Most of these Action Links are controlled by RoleManager permissions.

Production task-specific permissions directly control the Action Links available in the Production Task menus:

- **Initiate Production Manually** adds the action link Initiate Production to the main manuscript *Details* page (not the *Production Details* page). This allows an Editor working on a submission to move a manuscript into production.
- **End Production/Return to Production** allows users to take a submission out of production and move it back into production if needed. Users cannot end production

for a submission with one of more open production tasks assignments; the End Production action link will not appear in this case.

- **Manage Schedule Groups** allows users to close and re-open Schedule Groups. Closing a Schedule Group removes it from production and closes all associated submissions. If a Schedule Group is re-opened, the associated submissions are *not* automatically re-opened and must be reinstated individually.
- **Assign Production Task** allows users to assign a Production Task. Publications must make sure that at least one Production Task has been configured to allow this role to assign it and that the task has at least one valid recipient.
- **Cancel Production Task Assignment** allows users to cancel an assigned task.
- **View Production Details** displays the Production Details action link on production tracking pages.

The results of each Action Link are described below:

### Initiate Production

This can be used at anytime for submissions available in ProduXion Manager. Once a manuscript has entered production, production tasks may be assigned. Depending on configurations, users may be prompted to assign a Schedule Group and Production Task upon initiating production.

### End Production

This allows users to take a submission out of production, which prevents any more production tasks from being assigned. Users will normally do this after the submission has been published (the Publish Information link may also be used to set the final publication dates). The submission's Production Status changes to Production Completed.

Submissions taken out of production will appear in the View All Submissions with Production Completed folder.

**Note:** *The End Production action link only appears when there are no open Production Task assignments. If this option is not available for a specific submission, it may be necessary to cancel any outstanding Production Tasks on that submission first.*

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Enable the permission "End Production/Return to Production".

### Return to Production

Available only from the View All Submissions with Production Completed folder, this function reinstates the submission. The Production Status changes to Returned to Production and the submissions returns to the All Submission in Production folder.

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Enable the permission "End Production/Return to Production".

### Assign to Schedule Group and Change Schedule Group

These links allow users to either assign individual submissions that are currently in Production to a Schedule Group (Assign to Schedule Group) or to change the current schedule group assignment for a submission (Change Schedule Group). The links are available within the following folders when users have the "Manage Schedule Group" RoleManager permission enabled and submissions are currently in production:

- Submission Tasks Assigned to Me
- 'At-Risk' Submissions
- Production Initiated – No Tasks Assigned
- Submission Tasks I Have Assigned
- View All Submissions In Production
- View All Production Tasks With Authors
- Production Status Grid

**Note:** *The Assign to Schedule Group link also appears on the Submission Confirmation page which, once clicked, brings users directly to the Assign Submission to a Schedule Group page.*

### **Add Schedule Group**

Creates a new Schedule Group – if working with Volumes and Issue, add each Issue as a Schedule Group. Schedule Groups can be given volume and issue numbers and may contain basic page and image budget information.

Users can define a target publication date, and a separate target online publication date for each group. The group description will appear in production tracking lists.

When a Schedule Group is created, submissions may be assigned using the “Submit and Add Submissions to Group” button; otherwise, just submit the group and add submissions later.

**To Configure:** Go to RoleManager to enable the “Manage Schedule Group” permission.

### **Edit Group Details**

Allows users to modify the schedule group information; for example, submissions may be added to the group, removed, or the order in which submissions appear within the group may be changed. Users may also insert TOC Headers from this page.

Once on the Edit Group Details page, users will see an “Insert Header” button below the list of submissions in the Schedule Group. To make additional changes to this Header, the user may click the Edit Header link, opening the text up for editing again.

### Edit Schedule Group Details/Add Submissions

**Schedule Group Descriptions:**  Maximum Schedule Group Description is 100 characters

**Schedule Group Notes:**  
Permissions/Dislosures: None  
Announcements/Filers: Please include the af.

---

**Schedule Group Target Online Publication Date:**  (mm/dd/yyyy)

**Schedule Group Target Publication Date:**  (mm/dd/yyyy)

**Schedule Group Target Publication Volume:**

**Year:**

**Schedule Group Target Publication Issue:**

**Target Number of Submissions:**

**Page Budget:**

**Black and White Image Budget:**

**Color Image Budget:**

**Additional Schedule Group Details**

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

| 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 | 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                   | EBPOCD-0-20-00004 | Original Study | Mary Mary   | 21                     | 15                | 35              |                   | Manuscript Title This is the Best Manuscript |                       | Jun 01, 2020                  | 2                           | 1                 |
| <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                   | EBPOCD-0-19-00021 | Original Study | Abby Author | 5                      | 36                | 41              |                   | Training Demo Manuscript                     | Basic Science Section |                               | 0                           | 2                 |
| <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> | 3                   | EBPOCD-0-19-00023 | Original Study | Mary Mary   | 10                     | 42                | 51              |                   | A Dance with Dinosaurs                       | Basic Science Section |                               | 1                           | 0                 |
| <a href="#">Additional Manuscript Details</a>  |                     |                   |                |             |                        |                   |                 |                   |  |                       |                               |                             |                   |

## Add Submission

This function allows users to assign submissions to the Schedule Group, building up a table of contents.

Users can choose from unassigned submissions, or switch to a list of assigned submissions, allowing submissions to be moved into the current Schedule Group from others.

Once new submissions have been added, users will return to the *Edit Group Details* page, where they should check the order of submissions.

## Remove From Group

This removes an individual submission from the schedule group.

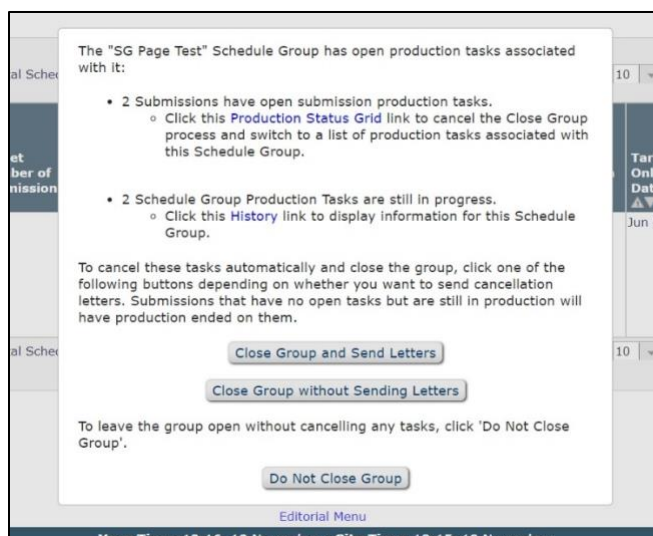
## Close Group

This takes the entire Schedule Group out of production. All submissions within the Schedule Group will be set to Production Complete status, and the Schedule Group will move to the Closed Schedule Group folders.

A Schedule Group cannot be closed if any submission assigned to it has any open production task assignments. Open Schedule Group and/or Submission Tasks will need to be canceled or submitted before the Schedule Group closure may complete. If there are open Schedule Group or Submission Production Tasks for any of the submissions in the group, the Editor or Publisher is presented with a warning that lists the number of open tasks along with links to the Production Status Grid or Correspondence History.

Editors and Publishers with the “Automatically Cancel Production Task Assignments when Closing Schedule Groups” RoleManager permission will be able to cancel all open tasks in one action after clicking the Close Group action link. The same warning dialog listing the number of open tasks is displayed, but Editors and Publishers with this permission may proceed to close the group with or without sending notification letters.





### Assign Production Task/Assign another Production Task

The Assign Production Task action link allows users to assign a Production Task to another person. When assigning a Production Task, selected files can be made available to the recipient and the notification email that will be sent may be customized. Once one task assignment has been completed, a second may be assigned from the *Confirmation* page.

During task assignment, files *must* be selected that will be made available to the person carrying out the task, unless he or she has permission to access the File Inventory for all submissions. These files can be selected from original submission files from the Author, or any Companion files that have been uploaded to the system.

The assignment process takes several steps:

- Select the Production Task to assign. Users with the “View Production Status History” will see this displayed here, allowing them to ensure that the task has not already been assigned. Users will only see the list of tasks for which their role is selected under the “Can be Assigned by” task setting.
- Select the correct recipient for the task. ProduXion Manager will check the “Can be assigned to” task setting and list only those users with valid roles. If there is only one possible recipient in the database, they will automatically be selected. If a user selects a Corresponding Author task, the Corresponding Author will automatically be selected.
- Edit the Letter Body field to add any special instructions to the standard template that is automatically displayed. This is the email notification that will be sent to the assigned user. The subject area can also be modified and cc: email addresses may be added.
- Select the files that the assignee will work on as part of the task assignment. For users without access to the File Inventory, this is the only way they can download files from the system. For example, publications can make the original manuscript text files available to the Copyeditor. Additional Companion files may be uploaded at this point and made available to the recipient as well.
- Click “Assign Task and Send letter” to complete the task assignment. Another task may be assigned from the confirmation screen.

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Enable the permission “Assign Production Task”. Publications may also wish to set the associated permissions “Cancel Production Task Assignment” and “Override Production Task Due Date”.

### Reassign Task

This link permits users to reassign a task to a different person when the original assignee is unable to complete a task assignment. When users are assigned a Production Task or Schedule Group Production Task with the “Allow Recipient to Reassign” option enabled, the Reassign Task action link will appear in the Submission Tasks Assigned to Me or Schedule Group Tasks Assigned to Me folders.

The Reassign Task action link is also added to the Submission Tasks I Have Assigned and Schedule Group Tasks I Have Assigned folders.

Upon clicking the Reassign Task link, users will be brought to a *Reassign Production Task* page, which is like the *Assign Production Task* page but includes:

- A list of possible recipients (as configured for the selected task), excluding the person who originally received the task. If there is only one other person to whom the task may be assigned, that person is automatically selected. If there are no other potential assignees, the user is presented with a warning alerting them that they may not reassign the task.
- The new due date for the reassigned task is calculated as if the task were originally assigned on the current date; the prior due date does not carry over to the new assignee.
- The Assign Task letter sent to the original recipient is used as the starting point for the Reassign Task letter so that any custom information that was added is initially retained.
- The original set of Assignment Files from the task being reassigned are automatically copied for the new task (no file grids are displayed).

Upon submitting on the *Reassign Task* page, the system cancels the original assignment and then creates a new Production Task Assignment record with the same task type and assignment files as the original assignment but with a new Due Date and Assignee. The original Task Assignment record will appear in the Production Status Grid as a canceled task, if the task type is configured to display on the grid. The Reassign Task letter is sent to the new assignee and the Cancel Assignment letter configured for this task type is sent to the original assignee. If no letter is configured, no notice of cancelation will be sent.

**To Configure:** In PolicyManager, click either Configure Submission Production Tasks or Configure Schedule Group Production Tasks in the ProduXion Manager section. Edit an existing task or create a new task. If the task can be assigned to Selected Editor/Publisher Roles only, the “Allow Recipient to Reassign” option is available. Select this option to allow the recipient to reassign the task. This option is not available for tasks that must be assigned to the Corresponding Author.

### Default Next Production Task

When assigning a Production Task (for a Submission or a Schedule Group), the user is presented with a dropdown list of all tasks appropriate to that user. The “Production Task:” dropdown menu is designed to pre-select a Production Task, by reviewing all previously assigned tasks and selecting the first task that has not yet been assigned based on the order established in PolicyManager.

Canceled tasks are treated as if they had never been assigned, so the default task selected may be a task that has already been cancelled. If all task types in the list have been assigned at least once, the system will default back to the “Please Choose a Production Task” option.

**Note:** *This functionality only suggests a task by making an initial selection in the Production Task drop down. The user may still change this to select any other available Production Task. Confirmation is now required from the user that the system has made the correct selection. The user must click the “Proceed with Selected Task” button to confirm selection of the task. The user is then navigated to the next page to configure the Assignment letter and Assignment Files before completing the assignment of the Production Task.*

### **Unavailability Information when Assigning Production Tasks**

The *Assign Production Task* and *Assign Production Task for Schedule Group* pages display additional Unavailable information for any assignee, whether a Publisher, Editor, or Author.

When a publication has the “Set Check Unavailability” setting configured with a number greater than 0, the appropriate date range is checked for any selected assignee when assigning a task. If an assignee is unavailable during this date range, the following occurs:

- A warning message displays next to the selected assignee to inform the user assigning the task that the selected person has unavailable dates that fall within the configured unavailability check window. The system will not prevent an unavailable person from being assigned a production task, it is for informational purposes only.
- Below the message, a grid displays the list of Unavailable Dates that fall within the configured time frame as well as the reason for the assignee's unavailability.
- If the Assignee has entered any suggested substitutes to contact in their absence, those names and email addresses are listed below the grid. The user making the assignment may choose to send a carbon copy (cc:) of the assignment letter to any of the substitutes by selecting the appropriate checkboxes.

**Note:** *Under existing functionality, Editors and Publishers do not receive deep links to their task. They instead must log into the system to see their tasks. Authors may be notified of their task assignments with the %PROD\_TASK\_DEEP\_LINK%. If this deep link is used, the deep link WILL populate in these cc:'d letters. It is recommended that users sending notes to any substitute remove the deep link from the letter for security reasons. It should be the responsibility of the assignee to manage the process for their substitutes to log in and receive the tasks.*

**Assign Production Task For Manuscript Number: Unassigned  
Abby Author (UNITED STATES): "Test Article"**

into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs will be removed when the letter is sent.

Cancel Assign Task and Send Letter

Schedule Group: No Schedule Group Assigned  
 Production Task: Task 1 - Intake  
 Task Assigned to: Christine Donovan /Production Editor  
 Due Date: 11/24/2021 (mm/dd/yyyy)  
 Assignment Letter:  
 From:  
 To:

**Christine Donovan**

This person is unavailable on the following dates.  
 If desired, please select a substitute below to receive an additional copy of the assignment letter.

| Start Date   | End Date     | Reason |
|--------------|--------------|--------|
| Nov 17, 2021 | Nov 24, 2021 | Busy.  |

Select Substitutes to CC:  
 No substitutes have been provided for this time period.

Letter Purpose: PROD Task - New Assignment  
 Letter Subject: New Production Task Assignment

**To Configure:** There is no configuration required to have the unavailability grid and warning message display when assigning a Production Task. However, the “Production Task History” section will only appear if a user has the “View Production Status History” permission enabled.

### Assign Follow-On Task

If a task that is configured to “Allow Follow-On Task Assignments” is submitted, then the *Assign Follow-On Production Tasks* page will appear. Users can continue to assign follow-on tasks from this page, and it will list all tasks assigned after completing the initial assignment.

When assigning follow-on tasks, users without full File Inventory access can only pass Companion Files that were sent to them for the initial assignment on to the next assignee in addition to any Companion Files they have just uploaded. Users with full File Inventory access can assign any Companion Files when assigning a Follow-On Task.

**To Configure:** Go to RoleManage and edit the desired Editor or Publisher role. Enable the permission “Assign Production Task”.

### Cancel Assignment

Allows users to cancel an assignment; a notification letter will be sent, which may be customized. Users with ‘Assign Production Task’ permissions will see this option on any task they have assigned. Users with ‘View All Submissions in Production’ will see this option for all assignments listed in the ‘View All Production Tasks with Authors’ folder. Cancelling an assignment generates a letter to the assignee.

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Enable the permission “Cancel Production Task”.

### View Assignment Letter

When viewing a list of assigned Production Tasks, users can reread the notification email that was sent regarding assignment of the task.

**To Configure:** No configuration required; anyone who has been assigned a task with an associated email notification will see this link.

### **View Instructions (Authors only)**

When Authors review the list of Production Tasks assigned to them, this link allows them to check any task instructions. Note that this link will only appear if instructions were written when the task was configured.

**To Configure:** No configuration is required to allow users to view the link. It will appear on assigned tasks where instructions have been written. To add instructions to a task, go to PolicyManager > Configure Production Tasks and edit the Production Task to which you would like to add instructions. Type the instructions into the “Production Task Custom Instructions” field. HTML formatting may be included in the instructions.

### **Assignment Files**

When viewing a list of Production Tasks assigned to them, this allows users to download the files for that assignment. Note that only files specifically selected during assignment will be made available here.

**To Configure:** No configuration required, but users should remember to select any files to be worked on when assigning each task.

### **Submit Task**

This allows users to notify the production team that an assignment has been completed and to upload any new files to the system.

Edit the Letter Body to return any special comments to the production team. The Production Task instructions and Assignment letters may be modified to let the users who carry out tasks know the task requirements.

Use the Upload File button to attach completed files. It's important not to forget to do this for most Production Tasks, so make sure the Production Task configuration option “Show Warning if File not uploaded when Task is Submitted” is checked.

**To Configure:** All task assignments will make the “Submit Task” link available to the recipient, but the behavior of the task on assignment may be changed. Go to Policy Manager > Configure Production Tasks and edit the desired Production Task to change the settings.

Set the option “Allow Follow-on Task Assignments” to display the *Follow-On Task Assignment* page when this type of task is completed.

Set the option “Show Warning if File not uploaded when Task is submitted” to warn users if they forget to upload a file.

Set the option “Limit the Submission Item Types that can be uploaded when Task is Submitted:” to allow only certain types of files to be uploaded. If a valid item type is not selected, then users cannot upload files when completing this task.

### **Production Details**

This displays the *Production Details* page.

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Enable the permission “View Production Details”.

## History

This displays the normal *History* page with the addition of the “Production Status History” material, as described in the Editorial Manager Pages Modified by Production Tasks section.

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Enable the permissions “View Production Status History” and “View Production Correspondence History”.

## Transmittal Form

This displays the normal Transmittal form viewable as a link from the main *Details* screen. This link is available on all main production tracking pages. Accessing this link allows users to review information entered by the publication when setting the Final Disposition before releasing to Production.

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Enable either of the permissions “View Transmittal Form” or “Edit Transmittal Form Fields”.

## File Inventory

This displays the Submission and Companion Files associated with the submission. Submission Files can only be downloaded, but Companion Files can be uploaded by users with the correct permissions. It is possible to allow an Editor working on peer-review, who does not otherwise have access to the Production Tasks, to review and download Companion Files.

Use the “Hide” and “Color Code” options to manage the File Inventory. Hiding allows users to retire older versions of files, ensuring that only the current set of working files is visible. Color Coding allows publications to tag files, which can help track file statuses or organize and group files.

The ZIP file download feature allows users to select the files to be downloaded on the File Inventory or Assignment Files page, and Production Manager will package them as a ZIP file on demand. Simply tick the selection box in the “Include in ZIP File” column and click the “Download ZIP file” button.

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Enable either of the permissions “Download Companion Files” or “Upload and Remove Companion Files”.

## Submission Production Workflows

System Administrators can define a subset of Submission Production Tasks. Each subset, called Submission Workflows, is given a unique name. Workflows may then be associated with specific Article Types, though publications may also choose to not associate a Workflow with a given Article Type, allowing for all Submission Production Tasks to be available. Only one Workflow can be associated with each Article Type, though multiple Article Types may use the same Workflow. After applying a named Workflow to an Article Type, users will see the configured set of available Submission Production Tasks when assigning a task for a submission of that type, comprised of those tasks in the selected Workflow that are also available for the user to assign.

The Submission Workflow acts as an additional filter when assigning tasks, cutting down the full list of tasks that would otherwise be presented. Users may still use the master list of tasks as a default for some Article Types, applying named Workflows only to those Article Types that need to follow a restricted set of tasks.

The Production Status Grid is modified to indicate which types of Submission Production Tasks are not applicable to each submission listed. As before, all Production Task Types that are configured with “Show Task in Production Status Grid” setting appear here, but now any task type that is either hidden or not in the Workflow linked to the Article Type for a particular submission, will appear with darker background shading:

| Action   | Manuscript Number | Author Name                           | Article Title                                   | Production Status | Production Notes                               | Date Production Initiated | Submission Target Online Date | Article Type   | Schedule Group | Test Task 1 | Task 1 - Istake | Task 2 - Conversion |
|--|-------------------|---------------------------------------|---|-------------------|--|---------------------------|-------------------------------|----------------|----------------|-------------|-----------------|---------------------|
| Production Details<br>History<br>Transmittal Form<br>Assign Production Task<br>Assign to Schedule Group<br>File Inventory<br>End Production<br>Send E-mail<br>Linked Submissions | DEMOCD-D-19-00009 | Edwin Expert<br>SP<br>(UNITED STATES) | A Brief History of the Entire Universe and More |                   | No Production Notes have been entered.<br>Edit | Jun 29, 2020              |                               | Original Study |                |             |                 |                     |
| Production Details<br>History<br>Transmittal Form<br>Assign Production Task<br>Change Schedule Group<br>File Inventory<br>Send E-mail<br>Linked Submissions                      | DEMOCD-D-19-00023 | mary mary<br>SP<br>(UNITED STATES)    | A Dance with Dinosaurs                          |                   | No Production Notes have been entered.<br>Edit | Jun 29, 2020              |                               | Original Study | SG Page Test   |             |                 |                     |

In addition, only the Production Tasks in the Submission Workflow are used when the system builds the submission schedule used behind the scenes to determine Must Start By and Must End By dates, Schedule Slip values, and At-Risk status for a submission.

Note that submissions that are already in production when a new Submission Workflow is applied will continue to show existing Must Start By values in the Production Status Grid. If a non-Workflow task has previously been assigned for a submission, that task’s dates will display in the grid, though the cell itself has a darkened background. The assigned Submission Workflow filtering will be seen when assigning tasks after the Workflow has been assigned to the Article Type.

### To Configure:

Go to PolicyManager and click the Configure Submission Workflows and Production Tasks link in the ProduXion Manager section. Enter a workflow name into the “New Custom Workflow Name” field on this page and click the Add button to create this workflow.

**Configure Submission Workflows and Tasks**

mission Workflows, including the system-defined 'All Submission Production Tasks' workflow; edit this workflow to define new Task Types, or remove/hide unwanted ones.

Custom Workflows. All Workflows define a set of Submission Production tasks and the relationships between them, such as the order of Tasks and Trigger Task links for Automatic Assignment. To use any Workflow, it must be in the Submission Workflow for submissions of these Types is then limited to tasks in the Workflow.

| Workflow Name                                       | Remove | Copy | Edit |
|---|--------|------|------|
| <b>Standard</b><br>All Submission Production Tasks  |        |      |      |
| <b>Custom Submission Workflows</b><br>Demo Workflow | Remove | Copy | Edit |

New Custom Workflow Name:  Insert Special Character Add

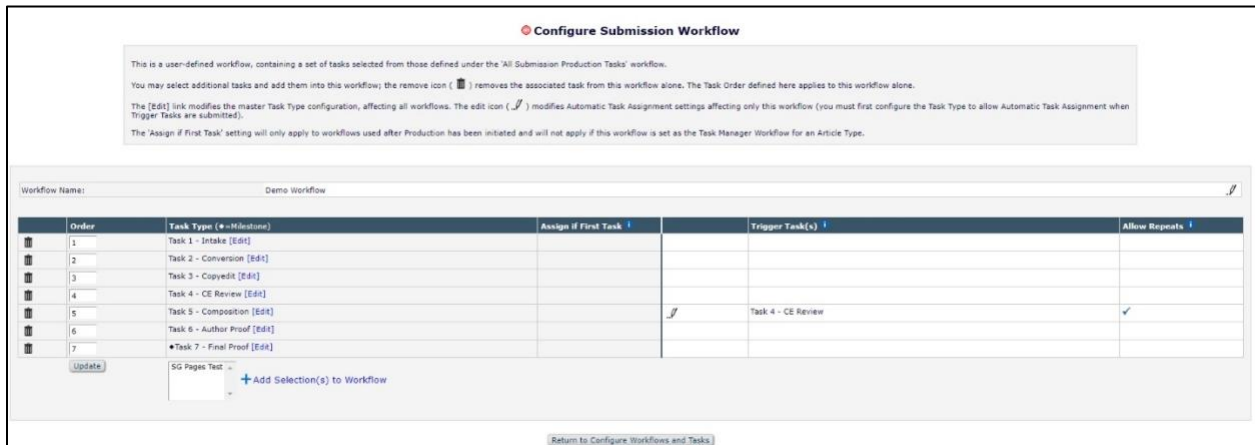
Maximum Workflow Name is 100 characters

[Edit Article Types](#)  
[PolicyManager Main Menu](#)

Clicking the Add button will display the *Add/Edit Submission Workflow* page, which lists all non-hidden Submission Production Tasks as defined on the All Submission Production Tasks



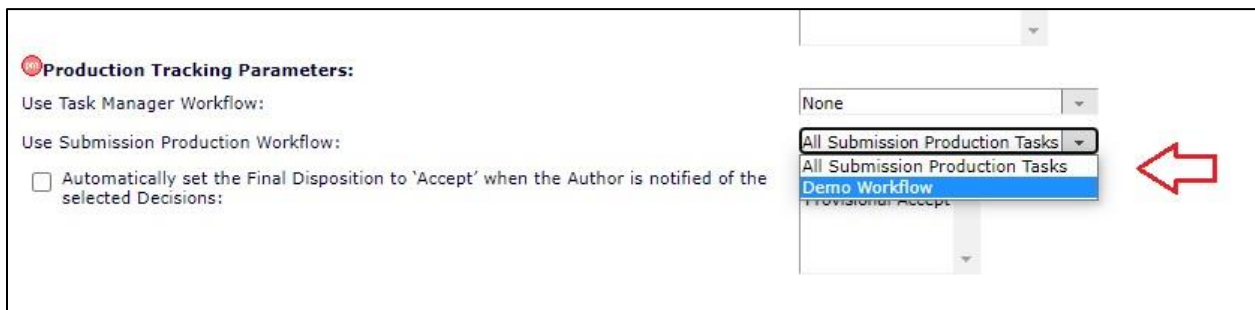
page. On this page, simply select those Submission Production Task Types to be included in this Workflow and make any edits to the tasks as needed:



Once a Submission Workflow has been defined, it must be linked to an Article Type. Go to PolicyManager, Edit Article Types, and edit the Article Type that will use the new Submission Workflow.

The “Production Tracking Parameters” section contains a “Use Submission Production Workflow” option. This option displays a dropdown list of all the currently defined Submission Workflows. The default selection in the drop-down list is “All Submission Production Tasks”, which means no Workflow is selected.

Select the newly defined Submission Workflow from the dropdown list here. Once saved, this will be applied immediately when assigning Submission Production Tasks and on the Production Status Grid display. It will only be applied to Must Start By dates for submissions entering production after this point.



**Note:** Each Article Type has a single Submission Workflow associated with it, but a specific Submission Workflow can be applied to multiple Article Types. At upgrade, the default setting is “All Submission Production Tasks”.

## Production Tasks for Schedule Groups

Production Tasks for Schedule Groups allows publications to use Production Tasks to assign Schedule Groups in the same way that individual submissions would be assigned to someone for completion

Companion files can be uploaded and linked to Schedule Groups. When a Schedule Group Production Task is assigned, Companion Files can be selected from the Schedule Group File Inventory or from the File Inventories of individual submissions assigned to the Schedule Group.

Once configured, Editors and Publishers will see new links for Schedule Group Task Assignments in their Production Menu, for Schedule Group Tasks Assigned to Me and Schedule Group Tasks I have Assigned.

A Schedule Group Tasks Reminder Report link appears for users with the “Send Production Reminders” RoleManager permission enabled.

The Schedule Group Tasks Assigned to Me folder is like the Submission-based Submission Tasks Assigned to Me folder, but it instead lists tasks related to Schedule Groups.

Schedule Group Tasks Assigned to Editor mary.mary

Page: 1 of 1 (1 total tasks) Display 10 results per page.

| Action  | Schedule Group | Production Task | Date Task Assigned | Date Task Due | Days Until Due | Assigned By | Target Publication Date | Target Publication Volume |
|---|----------------|-----------------|--------------------|---------------|----------------|-------------|-------------------------|---------------------------|
| <ul style="list-style-type: none"> <li>Submit Task</li> <li>Reassign Task</li> <li>Assign Production Task</li> <li>History</li> </ul> | SG Page Test   | SG Test Task    | Nov 17, 2021       | Nov 17, 2021  | Due Today      | mary.mary   | Jun 01, 2021            | 1                         |

Page: 1 of 1 (1 total tasks) Display 10 results per page.

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

The Schedule Group Tasks I Have Assigned is like the Submission-based Tasks I Have Assigned folder, but it instead lists tasks related to Schedule Groups:

Schedule Group Tasks I Have Assigned

Page: 1 of 1 (1 total tasks) Display 10 results per page.

| Action   | Schedule Group | Production Task | Assigned To | Date Task Assigned | Date Task Due | Days Until Due | Date Last Downloaded | Target Publication Date |
|--|----------------|-----------------|-------------|--------------------|---------------|----------------|----------------------|-------------------------|
| <ul style="list-style-type: none"> <li>Cancel Production Task</li> <li>Reassign Task</li> <li>Assign Production Task</li> <li>History</li> <li>File Inventory</li> </ul> | SG Page Test   | SG Test Task    | mary.mary   | Nov 17, 2021       | Nov 17, 2021  | Due Today      |                      | Jun 01, 2021            |

Page: 1 of 1 (1 total tasks) Display 10 results per page.

[Production Status Grid](#)  
[Schedule Group Tasks Reminder Report](#)  
[Production Tasks Menu](#)  
[Editorial Menu](#)

**To Configure:** Go to RoleManager and edit the appropriate Editor and Publisher roles to:

- Enable the “Assign Schedule Group Production Task” permission to allow the role to be selected to assign Schedule Group Production Tasks.
- Enable the “Receive Production Task” permission to allow this role to receive Schedule Group Production tasks (this setting applies to both Submission and Schedule Group Production Tasks).
- Enable the “Override Schedule Group Production Task Due Date” permission to allow the user to modify due dates for Schedule Group Tasks.
- Enable the “Cancel Production Task” setting to allow users with this role to cancel Schedule Group Production Tasks that they have assigned (this setting applies to both Submission and Schedule Group Production Tasks).

## Allow Schedule Group Task Recipients to Edit Pagination

There may be times when users are given Schedule Group Production Task assignments and part of that assignment is to provide Target Publication information, such as the order in which submissions appear and the target Start and End Pages for those items.

An “Allow editing of Target Pagination Fields” configuration option is available on the *Add Schedule Group Production Task* and *Edit Schedule Group Production Task* pages. When this option is selected, then the Recipient of this Schedule Group Production Task is presented with a new *Edit Pagination* link for that task in the *Schedule Group Tasks Assigned to Me* folder:

| Schedule Group | Production Task | Date Task Assigned | Date Task Due | Days Until Due | Assigned By | Target Publication Date |
|----------------|-----------------|--------------------|---------------|----------------|-------------|-------------------------|
| SG Page Test   | SG Test Task    | Nov 17, 2021       | Nov 17, 2021  | Due Today      | mary mary   | Jun 01, 2021            |

Clicking this link opens a new *Edit Pagination* page where the user can edit the following fields for submissions in the Schedule Group:

1. Target TOC Position
2. Target Number of Pages
3. Target Start Page
4. Target End Page

Users may also download the Table of Contents from this page using the “Download Table of Contents” links above the grid.

### Partial page display:

| Target TOC Position | Manuscript Number | Article Type   | Author Name | Target Number of Pages | Target Start Page | Target End Page |
|---------------------|-------------------|----------------|-------------|------------------------|-------------------|-----------------|
| 1                   | DEMOCD-D-20-0004  | Original Study | mary mary   | 21                     | 15                | 35              |
| 2                   | DEMOCD-D-19-0021  | Original Study | Abby Author | 5                      | 36                | 41              |
| 3                   | DEMOCD-D-19-0023  | Original Study | mary mary   | 10                     | 42                | 51              |

**To Configure:** To allow Schedule Group Task Recipients to Edit Pagination information when working on a Schedule Group Task, go to PolicyManager > Configure Schedule Group Production Tasks. Edit an existing task or add a new task.

On the *Add/Edit Schedule Group Task* page, a section called “Metadata Options” is displayed below the FTP Options section. This section has only one option: “Allow editing of Target Pagination Fields”. When this option is selected, then recipients of the Schedule Group Task

will see a new Edit Pagination link for the Schedule Group Task in the *Schedule Group Tasks Assigned to Me* folder.

**Edit Schedule Group 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**

Typing text into the Custom Instructions will display an "Instructions" link when the recipient views their task assignments. Leave this field empty to suppress this link.

**Production Task Custom Instructions:**

[MIDDLE OF PAGE NOT DISPLAYED]

Select Fields for Import

**Metadata Options**

Allow editing of Target Pagination Fields

**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 Companion File 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 Group Production Task Import Profile, 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.

Author Proof  
Companion Test  
Composition Files  
Fee Waiver Test

## Schedule Group Tasks Reminder Report

The Schedule Group Tasks Reminder Report allows user to generate lists of open or overdue tasks, and to generate reminder letters from the resulting list. The initial report setup page uses the same characteristics as the submission-based Tasks Reminder Report, but only Schedule Group-related Production Tasks are included in the results.

### Schedule Group Tasks Reminder Report

a list of people who have open (incomplete) production tasks related to Schedule Groups. Reminders can be sent from the report results page.

**Select Production Task:** All Schedule Group Tasks

**Select Schedule Group:** All Schedule Groups

**Assigned To:**  Check All  Clear All

- Editor
- Editorial Assistant
- Managing Editor
- Production Editor
- Compositor
- Converter
- Copyeditor
- Publisher

---

Using the above selections:

- Show open Production Tasks Assignments regardless of due date.
- Show open Production Tasks which are due between 11/1/2021 and 11/30/2021 (mm/dd/yyyy)
- Show open Production Tasks for Schedule Group with a Target Online Publication Date between 11/1/2021 and 11/30/2021 (mm/dd/yyyy)
- Show open Production Tasks for Schedule Group with a Target Publication Date between 11/1/2021 and 11/30/2021 (mm/dd/yyyy)
- Show open Production Task Assignments for Schedule Groups with Target Publication Volume or Issue
- Show open Production Tasks with more than 5 elapsed days since the Production Task was assigned.
- Show open Production Tasks that are within 10 days of their due date.
- Show open Production Tasks that are 7 days past their due date.

The results list contains only Schedule Group-related Production Tasks; per the submission-related report, individual assignments can be selected to generate reminders.

### Schedule Group Tasks Reminder Report

**Content:** Check the box under the 'Send Reminder' column to send a reminder letter to that person.  
You will have the opportunity to customize the individual reminder letters after clicking the 'Send Reminders' button.

Page: 1 of 1 (1 total submissions)      Display 10 results per page.

| Check All                | Send Reminder            | Production Task      | Assigned To | Date Task Assigned | Date Task Due | Days Until Due | Date Last Reminder Sent | # Reminders Sent | Total Elapsed Days | Schedule Group | Schedule Group Target Online Pub Date | Schedule Group Target Pub Date | Schedule Group Target Volume | Schedule Group Target Issue |
|--------------------------|--------------------------|----------------------|-------------|--------------------|---------------|----------------|-------------------------|------------------|--------------------|----------------|---------------------------------------|--------------------------------|------------------------------|-----------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | SG Test Task History | mary mary   | Nov 17, 2021       | Nov 17, 2021  | 0              |                         | 0                | 0                  | SG Page Test   | 20210601                              | Jun 01, 2021                   | 1                            | 1                           |

Page: 1 of 1 (1 total submissions)      Display 10 results per page.

Back to Schedule Group Tasks Reminder Report  
Return to Production Task Main Menu  
Editorial Menu

After clicking Send Reminders, the process of selecting and editing reminder letters is identical to the Submission-based reminder and uses the same Production Reminder letter family.

**To Configure:** If necessary, go to PolicyManager > Edit Letters to first add a new reminder letter to the Production Reminder family:

### Add 'General' Letter

The Letter Body box below. This default letter should not include HTML tags. To incorporate HTML tags, click 'Save' on this page and click the Edit link. HTML tags may then be added.

Letter Purpose:

Subject:

Letter Family: 

- Auto Pagination has completed successfully.
- Batch E-mail
- Co-Author Communications
- Communications to Author
- Decision
- Discussion Forum
- Editor Reminder
- Enterprise Analytics Reporting
- Full Text Xml Process Error
- Full Text Xml Process Success
- General
- Invite/Assign/Unassign Editor
- Production
- Production Reminder**
- Publication Charges
- Reviewer Invitation
- Reviewer Notification
- Reviewer Reminder
- Terminate Assignments
- The Auto Pagination task failed or was cancelled.

Use RoleManager > Editor or RoleManager > Publisher to enable the existing “Send Production Reminders” permission for Editors or Publishers who need to run these reminders:

#### History (Schedule Groups)

This link displays a *History* page specific to Schedule Groups. This can contain up to two sections, “Schedule Group Task History” and “Schedule Group Correspondence History”, depending on the user’s permissions. There is only one layout for this page unlike the submission *History* page, which can switch between Status and Timeline views.

- **Schedule Group Task History:** This displays a list of all Schedule Group Production Task assignments and their current assignment status; you can use this to assess how far the Schedule Group has progressed. You can access the Assignment Files, the list of Companion Files made available to the assignee through this assignment.
- **Schedule Group Correspondence History:** This displays all Production Task-related letters generated for the current Schedule Group. Editors may be given permission to manually add External Correspondence entries (an item of correspondence, such as an E-mail, received outside of the EM/PM system) to the History of a schedule group, where they can be viewed alongside PM-generated Internal Correspondence.

**To Configure:** Go to RoleManager and edit the desired Editor or Publisher role. Set either or both the permissions “View Schedule Group Production Correspondence History” and “View Schedule Group Production Task Assignment History”.



**Note:** User-defined Production Statuses do not apply to Schedule Groups, so they do not appear in the History page.

### File Inventory (Schedule Groups)

The File Inventory action link displays the *File Inventory for Schedule Group* page. Like the submission *File Inventory* page, this allows users to attach files to the Schedule Group itself. The upload, download, hide, replace and .ZIP file functionality is the same.

**File Inventory for Schedule Group: SG Page Test**

Listed below are the Companion files associated with the Schedule Group. (more...)

[Close](#) [Save and Close](#)

[Download Selections as Zip File](#)

**Companion Files** [Upload Companion Files](#) [Select Companion Files from Submissions](#)

| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Action                                 | Sub. TOC Position | Submission | Color  | Item           | Description (Limit 256 characters) | Item Family  | File Name             | Size     | Modified     | Operator  |
|-------------------------------------|-------------------------------------|--|-------------------|------------|--------|----------------|------------------------------------|--------------|-----------------------|----------|--------------|-----------|
| <input type="checkbox"/>            |                                     | Download<br>Replace<br>Hide<br>Preview |                   |            | Change | Companion Test | Composition File                   | Supplemental | Sample Abstract.doc   | 26.0 KB  | Nov 17, 2021 | mary mary |
| <input type="checkbox"/>            |                                     | Download<br>Replace<br>Hide<br>Preview |                   |            | Change | Companion Test | Companion File                     | Supplemental | Presentation Test.pdf | 187.7 KB | Nov 17, 2021 | mary mary |

[Hide Selected Companion Files](#) [Upload Companion Files](#) [Select Companion Files from Submissions](#)

These files are available when assigning Schedule Group Production Tasks. However, it may be necessary to include files from submissions within the Schedule Group as well. This is done by clicking the “Select Companion Files from Submissions” button, displaying the *Select Associated Companion Files* page.

**Select Associated Companion Files**

Listed below are all non-hidden Companion Files associated with submissions currently assigned to this Schedule Group. Selecting a file will make it available to the Schedule Group, but note it will also remain linked to the original submission and will appear under the submission's File Inventory as well.

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

**Associated Companion Files**

| Select File              | Sub. TOC Position | Color Code | Item           | Description    | Item Family  | File Name                         | File Reference | Size  | Last Modified | Uploaded By       | QC Results |
|--------------------------|-------------------|------------|----------------|----------------|--------------|-----------------------------------|----------------|-------|---------------|-------------------|------------|
| <input type="checkbox"/> |                   |            | Companion Test | Title Page     | Supplemental | New Manuscript.docx               |                | 11 KB | Oct 07, 2019  | mary mary         |            |
| <input type="checkbox"/> |                   |            | Companion Test | Companion Test | Supplemental | New Manuscript.docx               |                | 11 KB | Oct 07, 2019  | Christine Donovan |            |
| <input type="checkbox"/> |                   |            | Companion Test | Title Page     | Supplemental | Training Part Two Title Page.docx |                | 11 KB | Oct 31, 2019  | Abby Author       |            |
| <input type="checkbox"/> |                   |            | Companion Test | Companion Test | Supplemental | Training Part Two Title Page.docx |                | 11 KB | Oct 31, 2019  | Christine Donovan |            |
| <input type="checkbox"/> |                   |            | Companion Test | Title Page     | Supplemental | Sample Author Agreement.doc       |                | 22 KB | Sep 17, 2019  | Abby Author       |            |
| <input type="checkbox"/> |                   |            | Companion Test | Companion Test | Supplemental | Sample Author Agreement.doc       |                | 22 KB | Sep 17, 2019  | Christine Donovan |            |
| <input type="checkbox"/> |                   |            | Companion Test | Title Page     | Supplemental | Title Page 2.docx                 |                | 11 KB | Oct 11, 2019  | mary mary         |            |
| <input type="checkbox"/> |                   |            | Companion Test | Companion Test | Supplemental | Title Page 2.docx                 |                | 11 KB | Oct 11, 2019  | Christine Donovan |            |

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

Files selected from associated submissions remain with those submissions, but also appear in the Schedule Group File Inventory, and when assigning tasks. Note that only Submission Companion Files linked to Submissions can display Reference Checking or Artwork Quality Checking results.



**To Configure:** The Manage Schedule Groups folder can be accessed by Editor and Publisher roles configured with the “Manage Schedule Groups” permission in RoleManager.

To allow access to the History Action Link, configure the relevant Editor and Publisher roles with the “View Schedule Group Production Task Assignment History” and “View Schedule Group Production Correspondence History” permissions.

To allow access to the File Inventory link, configure the required Editor and Publisher roles with the “Download Companion Files” or “Upload, Hide and Restore Companion Files” permissions. These are the same permissions used to access Submission File Inventories:

### Assigning a Production Task for a Schedule Group

Publications may create Production Tasks for Schedule Groups. These tasks are a separate list from the existing Production Tasks (referred to as Submission Production Tasks).

**To Configure Tasks:** Go to PolicyManager > Configure Schedule Group Production Tasks. This leads to a list of all Schedule Group-specific Production Tasks configured in the system, similar to the existing list of Submission-specific Production Tasks. Use the Add functionality to create new Production Tasks for use with Schedule Groups or use the Edit functionality to change the configuration of existing tasks.

| Order | Production Task Name |        |      |
|-------|----------------------|--------|------|
| 1     | SG Test Task         |        | Edit |
| 2     | Update Pagination    | Remove | Edit |
| 3     | Printing             | Remove | Edit |

Schedule Group Production Tasks configuration is very similar to that for Submission Production Tasks:

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

**Assignment Options**

Typing text into the Custom Instructions will display an "Instructions" link when the recipient views their task assignments. Leave this field empty to suppress this link.

**Production Task Custom Instructions:**

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).

Can be Assigned by:

Under Assignment Options, Schedule Group Production Tasks cannot be assigned to Corresponding Authors; this option is not available, at least one Editor or Publisher role must be selected for both the “Can be Assigned by:” and “Can be Assigned to:” options.

Note that publications can allow Follow-on Task Assignments from a Schedule Group Task. For this to be useful, the “Can be Assigned to” roles should be able to assign the Schedule Group Task that normally follow on from this task.

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).

Can be Assigned by:

- Editor
- Editorial Assistant
- Managing Editor
- Production Editor
- Publisher

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).

Can be Assigned to:

- Editor
- Editorial Assistant
- Managing Editor
- Production Editor
- Compositor
- Convertor
- Copyeditor

Schedule Group Production Tasks can be configured to automatically transfer files to the assignee via FTP, and to receive files back in the same way, per current functionality for Submission Tasks. This uses FTP Transmittal Methods and Import Profiles specific to Schedule Group tasks; to set these up, contact an Aries representative.

The Companion File Options are identical to the Submission Companion File options for submission files. Note that to allow suppliers to return files via FTP; the task must be limited to a single Companion File Type that can be uploaded when the task is Submitted.

**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

**Metadata Options**

Allow editing of Target Pagination Fields

**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 Companion File 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 Group Production Task Import Profile, 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.

Companion Test  
 Composition Files  
 Fee Waiver Test

The Scheduling and Due date options are simpler for Schedule Group Tasks:

- They cannot be configured to appear in the Production Status Grid.
- They cannot be configured to be included in At Risk and Must Start By date calculations.
- There is no Due Date option based on Submission Target Online Publication Date; only target dates from the Schedule Group can be used.

The Letter Options are unchanged from the Submission Tasks. Both Submission and Schedule Group Tasks share the same pool of letters in the Production letter family.

**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:

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

Number of Days prior to Schedule Group Target Publication Date:

**Letter Options**

The Letters available for this feature are those assigned to the "Production" letter family. The letters may be customized prior to being sent.

**Assignment Letter:**

Allow Task Assignment without Sending Letter

**Cancel Assignment Letter:**

**Submit Task Letter:**

After the System Administrator has created Schedule Group Production Tasks, they can be used to assign entire Schedule Groups of work to people. In a similar fashion to the existing Submission-based Production Task functionality, the Assign Production Task link allows the user to assign Production Tasks, however the task recipient may now be asked to process all submissions within the Schedule Group.

The basic page flow is identical to submission-based Production Task assignments, with an initial task selection page followed by a main page where the assignee is selected, the letter customized, and any files required to complete the task made available to the assignee:

**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:** SG Page Test

**Production Task:**

**SCHEDULE GROUP TASK HISTORY**

| Date Task Assigned | Production Task | Date Task Due | Assigned By | Assigned To       | Production Task Status |
|--------------------|-----------------|---------------|-------------|-------------------|------------------------|
| Nov 17, 2021       | SG Test Task    | Nov 17, 2021  | mary mary   | mary mary         | Open                   |
| Nov 17, 2021       | SG Test Task    |               | mary mary   | mary mary         | Completed              |
| Mar 24, 2021       | SG Test Task    |               | mary mary   | Christine Donovan | Completed              |
| Mar 24, 2021       | SG Test Task    |               | mary mary   | Christine Donovan | Completed              |
| Aug 13, 2020       | SG Test Task    |               | mary mary   | Christine Donovan | Completed              |
| Aug 13, 2020       | SG Test Task    |               | mary mary   | Christine Donovan | Completed              |

Once a task is selected from the Schedule Group Production Task dropdown list, the page below is displayed.

Per submission assignments, Companion Files from the Schedule Group File Inventory can be made available to the Task Recipient. In addition, the "Select Companion Files from

Submissions" button allows users to also select files from submissions in the Schedule Group as described above.

### Assign Production Task for Schedule Group: SG Page Test

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Schedule Group: SG Page Test  
 Production Task: Update Pagination  
 Task Assigned to:    
 Due Date: None required (this is a Milestone Task)

Assignment  
Letter:

From: "mary mary" <trash133939393@ariessc.com>  
 To: **Emilia Editor**  
 Letter Purpose: PROD Task - New Assignment  
 Letter Subject:

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:   
 bcc:

Letter Body:  |

Hello,  
 You have been assigned a task.  
 Find the task here: %PROD\_TASK\_EDITOR\_PUBLISHER\_DEEP\_LINK%  
 Thanks,  
 The Journal

#### Companion Files

| Sub. TOC Position | Submission | Item   | Description                                   | Item Family  | F  |
|-------------------|------------|--|---|--------------|----|
|                   |            | <input type="text" value="Companion Test"/> <input type="button" value="v"/> | <input type="text" value="Composition File"/> | Supplemental | Si |
|                   |            | <input type="text" value="Companion Test"/> <input type="button" value="v"/> | <input type="text" value="Companion File"/>   | Supplemental | Pr |



The recipient of the task will be able to download the selected files from the *Assignment Files* page in the Schedule Group Tasks Assigned to Me folder:

**Assignment Files for Schedule Group SG Page Test**

**Production Task Update Pagination**

This page lists all files with the selected task assignment, either made available through the assignment, or uploaded by the assignee.

Close

Download Zip File

Assignment Files

| Sub. TOC Position | Submission | Color Code | Item           | Description      | File Name             | Date Last Modified | Date Last Downloaded | QC Results | Action   |
|-------------------|------------|------------|----------------|------------------|-----------------------|--------------------|----------------------|------------|----------|
|                   |            |            | Companion Test | Composition File | Sample Abstract.doc   | Nov 17, 2021       |                      |            | Download |
|                   |            |            | Companion Test | Companion File   | Presentation Test.pdf | Nov 17, 2021       |                      |            | Download |

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**To Configure:** Create new Assignment, Cancellation and Submit Task letters for new tasks, if required, from PolicyManager > Edit Letters. Create these letters in the Production letter family.

**Add 'General' Letter**

to the Letter Body box below. This default letter should not include HTML tags. To incorporate HTML tags, click 'Save' on this page and click the Edit link. HTML tags may then be added.

Letter Purpose: PROD - Pagination Issues

Subject: Pagination Task

Letter Family: General

- Auto Pagination has completed successfully.
- Batch E-mail
- Co-Author Communications
- Communications to Author
- Decision
- Discussion Forum
- Editor Reminder
- Enterprise Analytics Reporting
- Full Text Xml Process Error
- Full Text Xml Process Success
- General
- Invite/Assign/Unassign Editor
- Production**
- Production Reminder
- Publication Charges
- Reviewer Invitation
- Reviewer Notification
- Reviewer Reminder
- Terminate Assignments
- The Auto Pagination task failed or was cancelled.

The %SCHEDULEGROUP\_TOC% merge field inserts a list of all submissions currently assigned to the schedule group. For each submission, the system lists the TOC Position plus the identifiers configured to appear in Production. i.e.:



1; 10.300/JXYZART-JXYZ-D-08-00004.1; JXYZ-D-08-00004; John Smith (United Kingdom); Assessment of testing efficiency in university Hospitals  
2; 10.300/JXYZART-JXYZ-D-07-00123.1; JXYZ-D-07-00123; Art Jones (United States); Long term epidemiological studies in sub-Saharan tribes

Several additional merge fields allow publications to include information from the Schedule Group in these letters:

- %SCHEDULEGROUP\_DESCRIPTION%
- %SCHEDULEGROUP\_TARGET\_VOLUME%
- %SCHEDULEGROUP\_TARGET\_ISSUE%

For tasks that use the Production Task FTP feature, the %PRODUCTION\_TASK\_GUID% merge field inserts a code unique to the individual Production Task assignment.

## Custom Details Pages

The *Details* pages (Editorial Details, Production Details and Proposal Details) have default layouts. Publications can customize the following information in PolicyManager under General Policies > Define Details Page Layouts:

- Select which data items are displayed on the page.
- Create Section Headings to visually organize the page.
- Define the order in which sections and selected items appear on the page.
- Specify anchor links to frequently used items on the page.
- Decide which Action Links (i.e., Transmittal Form, Technical Check, Publish Information, etc.) are displayed on the page.

**Note:** *RoleManager permissions take precedence over these settings.*

Existing permissions for individual fields or links are applied within the layout to suppress individual items for specific roles, allowing users to share basic layouts but fine-tune these for certain roles.

The following items are displayed on the *Details* page, if selected in PolicyManager under General Policies > Define Details Page Layouts on the *Select Items to Display* page:

- First Author: The display is just like Other Authors, with the “Mail To” functionality giving the ability to send an e-mail ad hoc.
- All Authors: The same display and functionality as First Author, described above.
- Region of Origin: This item is suppressed if there is no Region of Origin currently associated with the submission.
- Suggested Reviewers: This item is suppressed if there are no Suggested Reviewers associated with the submission.
- Opposed Reviewers: This item is suppressed if there are no Opposed Reviewers associated with the submission.
- Manuscript Number
- DOI (Digital Object Identifier)
- Custom Submission Flags: This displays all currently selected submission flags on the main *Details* page. This item is suppressed if there are no flags associated with the submission or if the user does not have permission to “View Submission Flags”.

- Additional Manuscript Details: This is displayed if configured on the *Edit Additional Manuscript Detail Field* page in PolicyManager.
- Latest Revision Number: If no revisions have been submitted, the text “No revisions have been received” is displayed. Otherwise, the appropriate revision number is displayed here.
- Date Latest Revision Submitted: This is suppressed if there are no revisions.
- Final Decision Date
- Final Disposition Date
- Corresponding Production Editor
- Date Entered Production
- Date Production Completed
- Production Tasks
- Schedule Group
- Schedule Group Target Online Publication Date
- Schedule Group Target Publication Date
- Schedule Group Target Volume
- Schedule Group Target Issue
- Position in Schedule Group Contents
- Target Number of Pages
- Target Start Page
- Target End Page
- Black and White Image Count
- Color Image Count
- Submission Actual Online Publication Date
- Submission Actual Publication Date
- Submission Actual Number of Pages
- Submission Actual Start Page
- Submission Actual End Page
- Submission Actual Volume Number
- Submission Actual Issue Number
- Submission Actual TOC Position

**To Configure:** To customize the *Details* page layouts, go to PolicyManager > Define Details Page Layouts. Three default layouts exist. These layouts represent the library of existing page layouts in the system. The easiest way to create a new layout is to copy an existing layout and make changes from there.

However, users can also start new by clicking the “Add New Layout” button.

## Corresponding Production Editor

For any individual submission, a specific person may be designated to be the Corresponding Production Editor for that submission. This allows users to route selected items of correspondence to that person and adds a series of mail-merge fields which include their details in correspondence.

The Corresponding Production Editor is changed on the *Production Details* page.

**To Configure:** Identify the types of users who can be designated as Corresponding Production Editors by using RoleManager, Publisher or Editor Role, select the desired Role and enable the “Serve as Corresponding Production Editor” permission.

Identify the types of users who can choose and change the Corresponding Production Editor for a specific submission by using RoleManager, Publisher or Editor Role, select the desired Role and enable the “Change Corresponding Production Editor” permission.

Configure any General Letters where responses should be directed or cc'd to the Corresponding Production Editor, and not the general publication address. Go to PolicyManager > Edit Letters to add or edit such a letter. Select the “Use Corresponding Production Editor’s Address” option for the “Sender’s E-mail address” setting. This will route any responses to the Corresponding Production Editor when a user replies in their email program. Optionally, it is possible to select the “Corresponding Production Editor” option for the “Automatic cc:” option.

Configure any ad hoc letters that should be sent directly or cc'd to the Corresponding Production Editor. Go to PolicyManager > Edit Letters to add or edit an “Ad-Hoc from Author” or “Ad-Hoc from Editor” Letter. Select the “Corresponding Production Editor” option under the “Recipient” or “Automatic cc:” options.