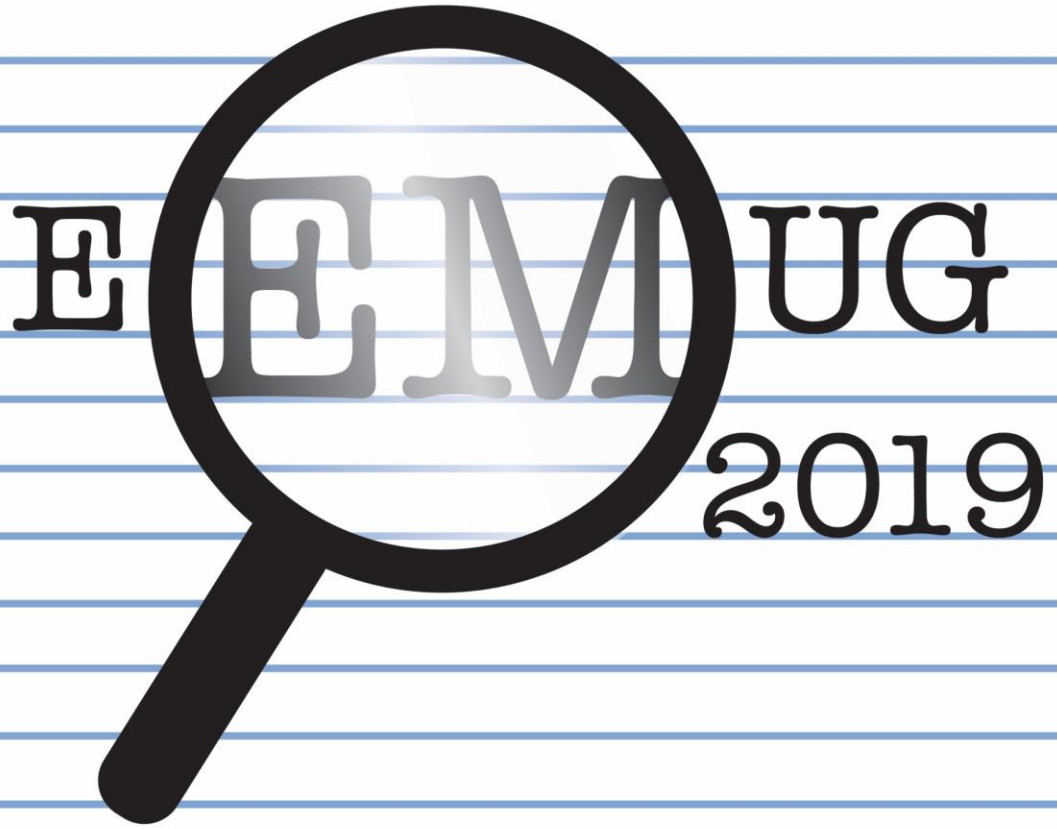
Welcome to




#EEMUG2019

em Editorial Manager®

pm ProduXion Manager®

Aries systems

# Agenda

ProduXion Manager®

Introductions – 10 minutes

New Functions – 20 minutes

- Enterprise View
- Task Manager

LiXuid Queries – 10 minutes

Feature Improvement Ideas – 20 minutes

Report Fun! – the rest of the minutes

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# PM – Enterprise View

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ProduXion Manager®

15th Annual European Editorial Manager® User Group Meeting

# PM Enterprise View ("EV")

- PM users have long asked for a way to manage production responsibilities across multiple publications without having to login and logout, or jump from one PM site to the next.
- **SOLUTION: New PM Enterprise View allows users to access submissions across multiple publications within a single interface from a new menu tab available on any of the PM sites.**

# Phased Implementation

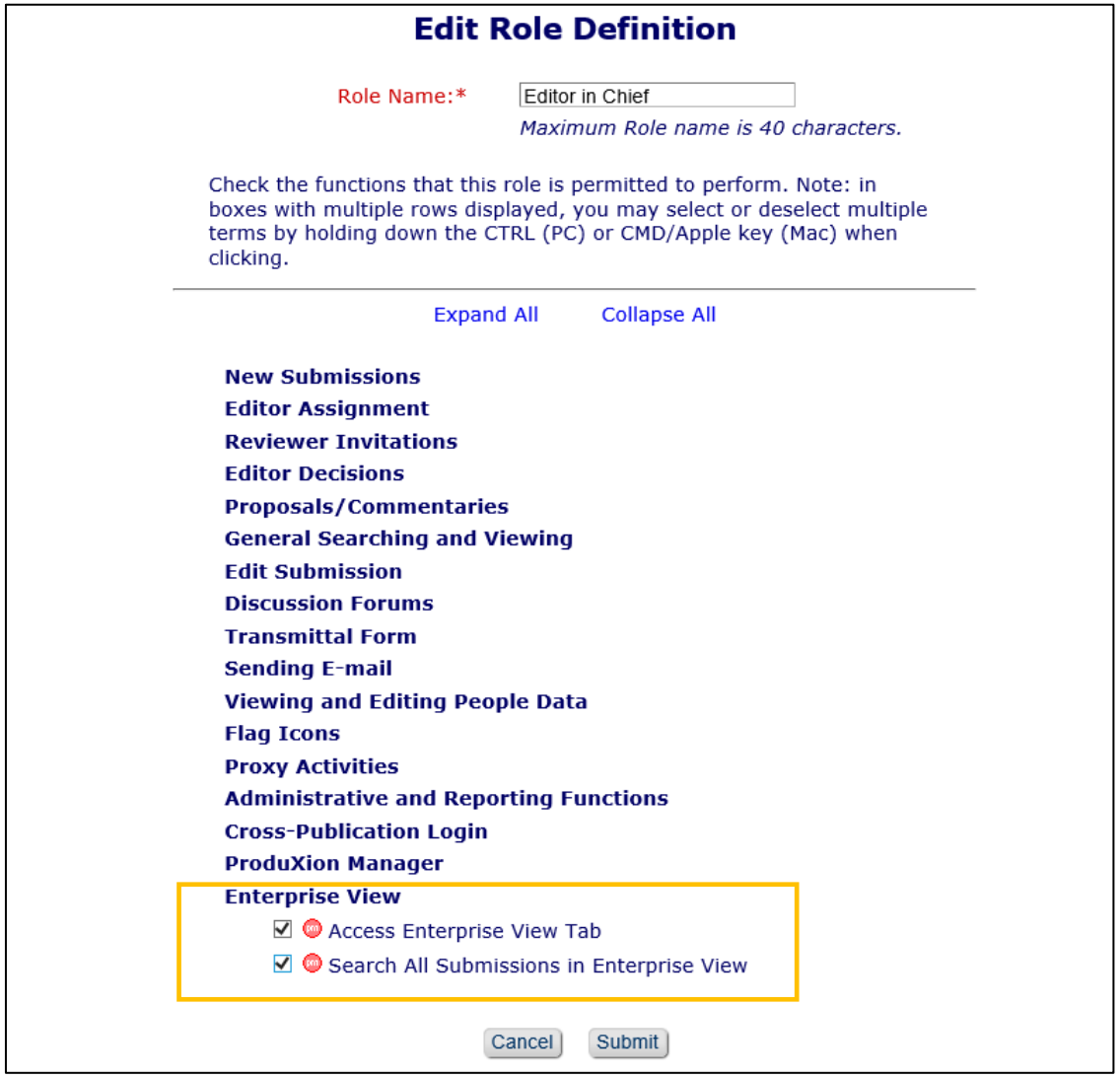
- Version 16.1, currently in development
- Build the infrastructure
- Submission Tasks Assigned to Me  folder
- Schedule Group Tasks Assigned to Me folder
- Search Submissions

- Version 17.0, currently in planning and design stage
- Plan to extend EV to remaining folders in Production Tracking Menu

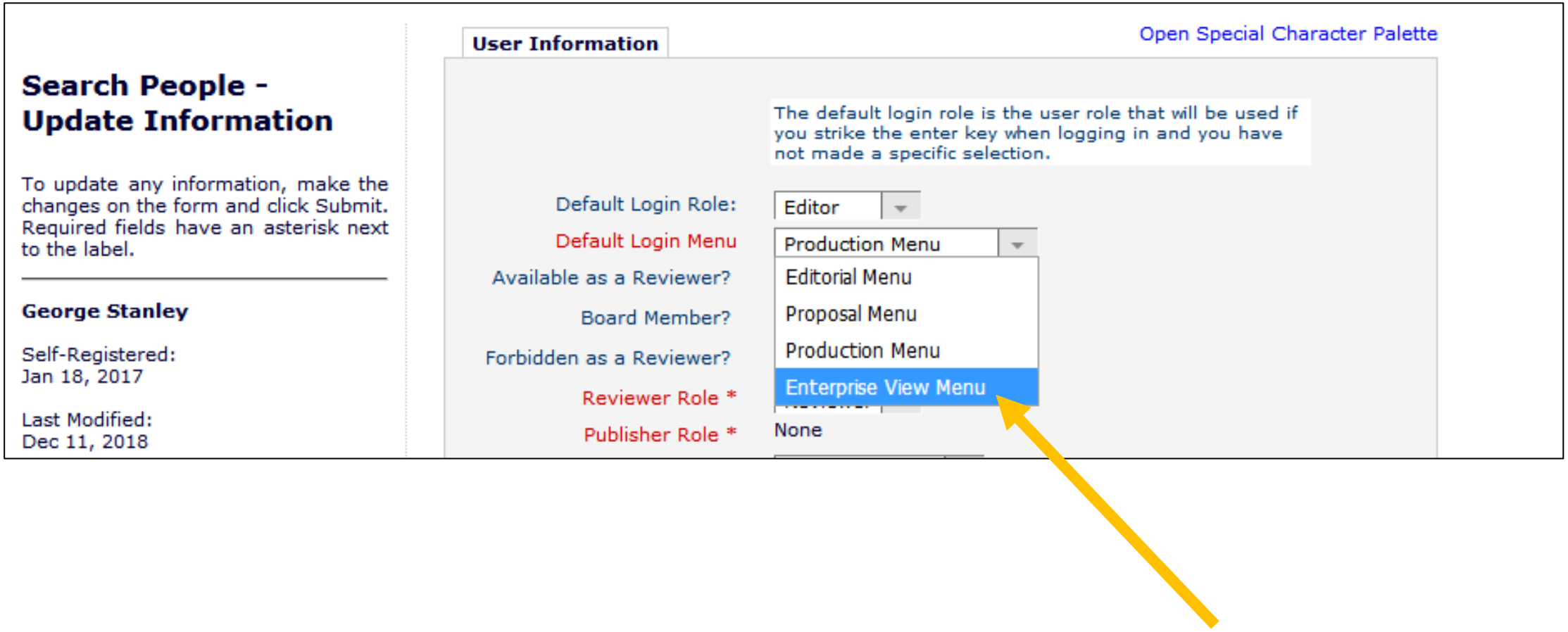
# Pre-Requisites

- Publication must be a PM customer
- Publication must have a UDB (Unified Database)
- User has Editor or Publisher RoleManager permission to access EV
- User has Cross-Publication Login permissions and has configured a Cross-Publication Login List
- User has appropriate production-related permissions on publications in the group

# New Editor and Publisher RoleManager Permissions

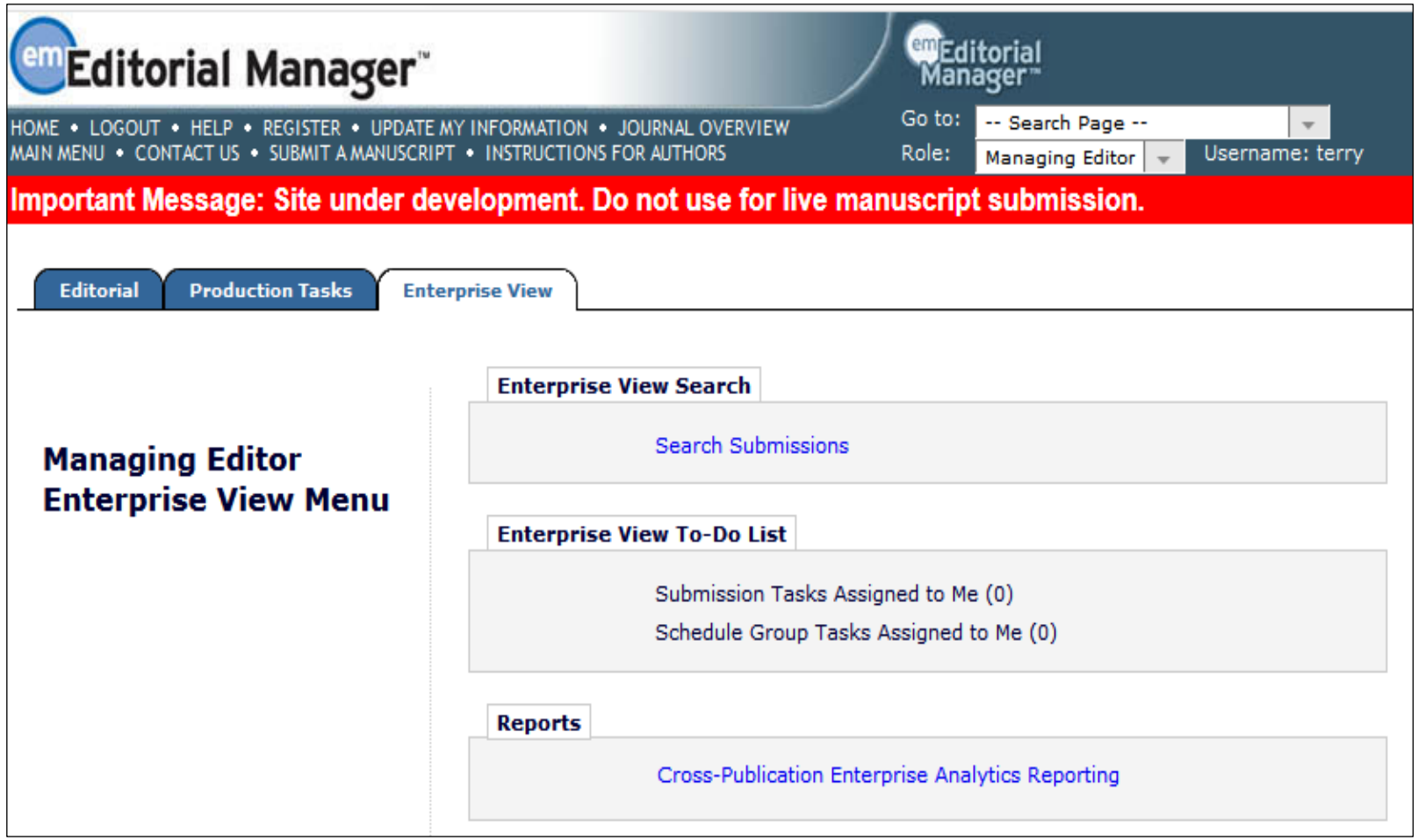


# Ability to make EV Menu a user's Default Login Menu



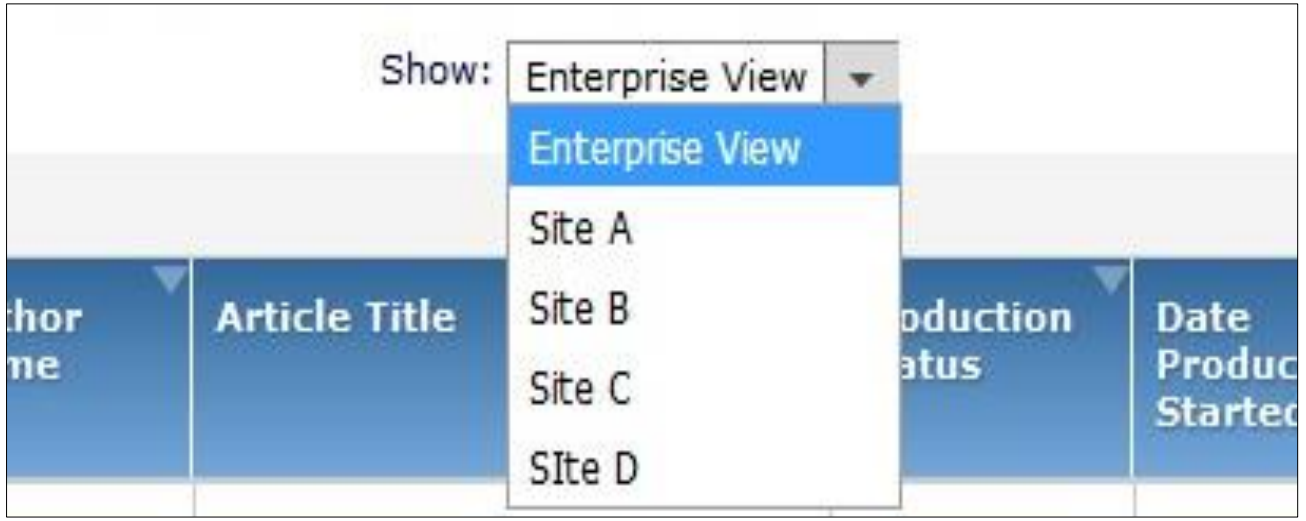
# New Enterprise View Menu

- Phase 1 includes:
  - Search Submissions
  - Submission Tasks Assigned to Me
  - Schedule Group Tasks Assigned to Me
  - Cross-Publication Enterprise Analytics Reporting (XEAR)



# EV Folders

- EV folders take the existing PM folders and enhance them with:
  - Publication Code filter to refine the result set by publication




  - New Publication Code column to easily identify which site the task belongs to
  - PowerGrid format (like the existing Production Status Grid)

# EV Folders (continued)

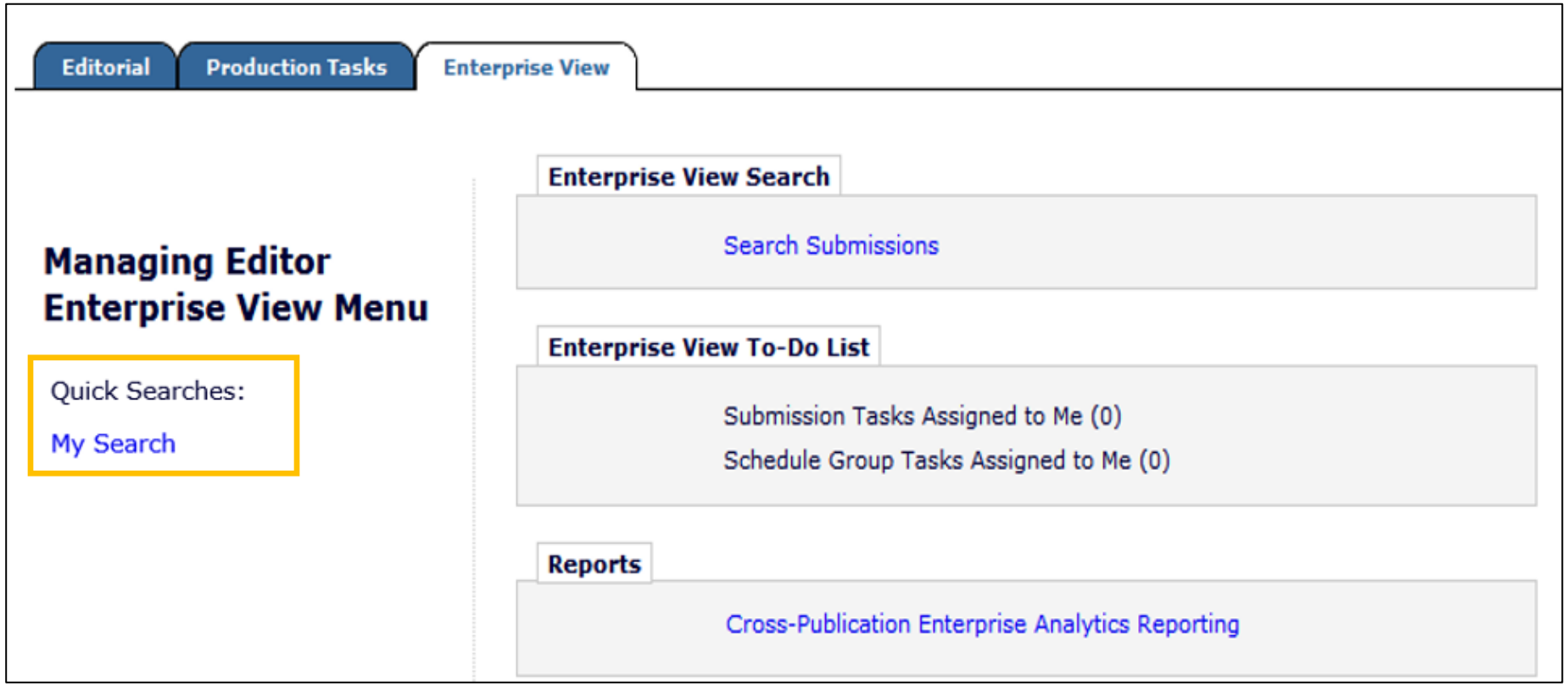
- Full set of Action links for the records on the current site
- A ‘Go To’ link to carry out actions on other publications
- Enhanced navigation on confirmation pages, allowing the user to seamlessly flow back and forth amongst publications without having to consciously “switch to” another publication

# EV Search Submissions

- EV Search Submissions takes the existing search functionality and enhances it with:
  - Four new search criteria:
    - Publication Code
    - Corresponding Production Editor First Name
    - Corresponding Production Editor Last Name
    - Date Most Recent Production Task Completed
  - Same PowerGrid format and Action links as EV folders

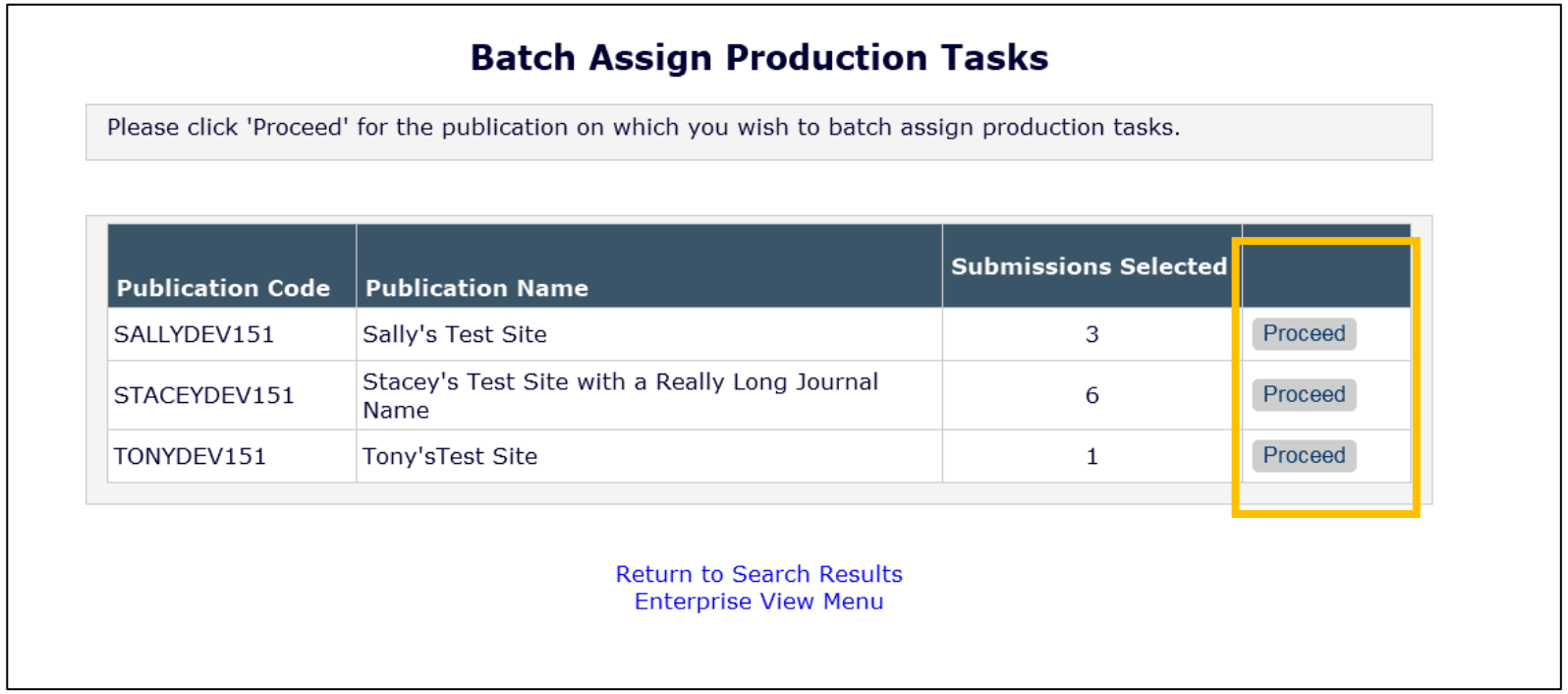
# EV Search Submissions (continued)

- Ability to Save searches and display them on the user's EV Menu
  - Note: Saved searches cannot be shared with other users in Phase 1



# Cross-Pub Batch Task Assignment

- Today, users can batch assign production tasks from Search Submissions – Search Results
- New in EV Search Results, users can batch assign tasks in a single workflow cross-publication

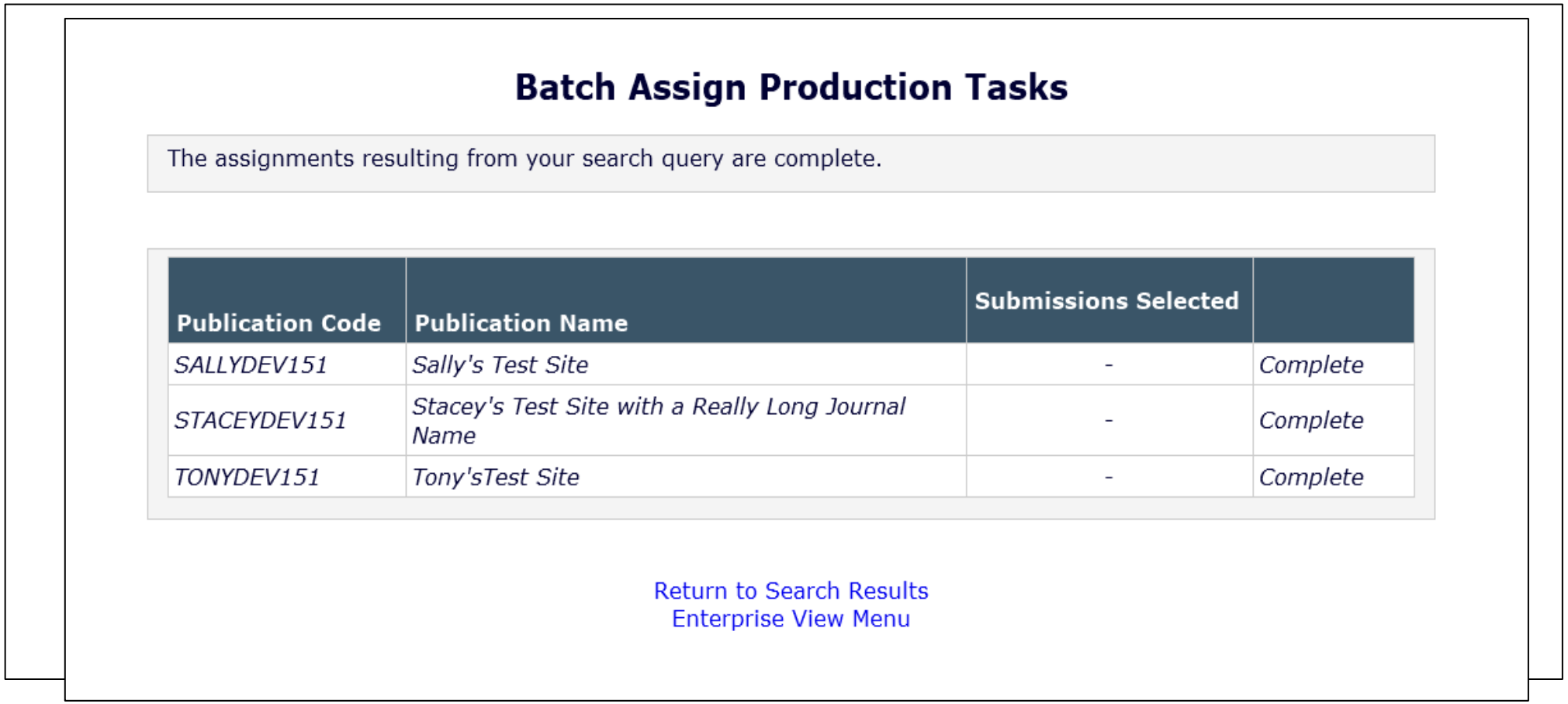


# Cross-Pub Batch Task Assignment

- User steps through the selection of task and assignee, letter customization, upload of files
- On the confirmation page, there are navigation links to keep the user in “EV mode” and proceed with batch assignment on the next publication

# Cross-Pub Batch Task Assignment

- Clear indication of what is complete and what is left to do



## Batch Assign Production Tasks

The assignments resulting from your search query are complete.

| Publication Code | Publication Name | Submissions Selected | |
|---|---|---|---|
| *SALLYDEV151* | *Sally's Test Site* | - | *Complete* |
| *STACEYDEV151* | *Stacey's Test Site with a Really Long Journal Name* | - | *Complete* |
| *TONYDEV151* | *Tony'sTest Site* | - | *Complete* |

Return to Search Results
Enterprise View Menu

# Phase 2 – Version 17.0

- Still in planning and analysis phase, but the goal is to extend this functionality to the rest of the ProduXion Manager folders.

# Task Manager

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ProduXion Manager®
Task Manager®
15th Annual European Editorial Manager®
User Group Meeting

# Task Manager – 15.1

More and more frequently Submission Production Tasks are being used for work traditionally tied to the editorial workflow, rather than being limited to just production work.

Currently, the use of “tasks” is tied to initiating production on a submission, which does not make sense to customers who use tasks in pre-production workflows, or who do not use ProduXion Manager.

**SOLUTION: “Production Tasks” will be renamed “Editorial Tasks” for users accessing tasks before production is officially initiated, and for users who do not use the Production Tracking functions of ProduXion Manager.**

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# Task Manager – 15.1

“Editorial Tasks” in EM are discrete jobs that do not affect the peer review workflow.

- Language edit
- Artwork manipulation check
- Copyright check
- Conflict of interest deposit
- Preprint server deposit

They might happen in parallel and/or they might be done on some submissions and not others.

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# Task Manager – 15.1

New Task Manager and existing Production functionality allow publications to configure different roles for different groups of staff to provide access to only relevant submissions and production-related or Task Manager–related actions. Example configurations:

**Editorial Task Staff.** This role has access to view all submissions in Task Manager, and is suppressed from seeing submissions in production.

**Production Staff.** This role has access to view all submissions in production, and is suppressed from seeing any submissions in Task Manager.

**Administrator.** This role has access to view all submissions both in Task Manager and Production, and is able to manually assign tasks in Task Manager and initiate production on submissions and assign tasks as needed.

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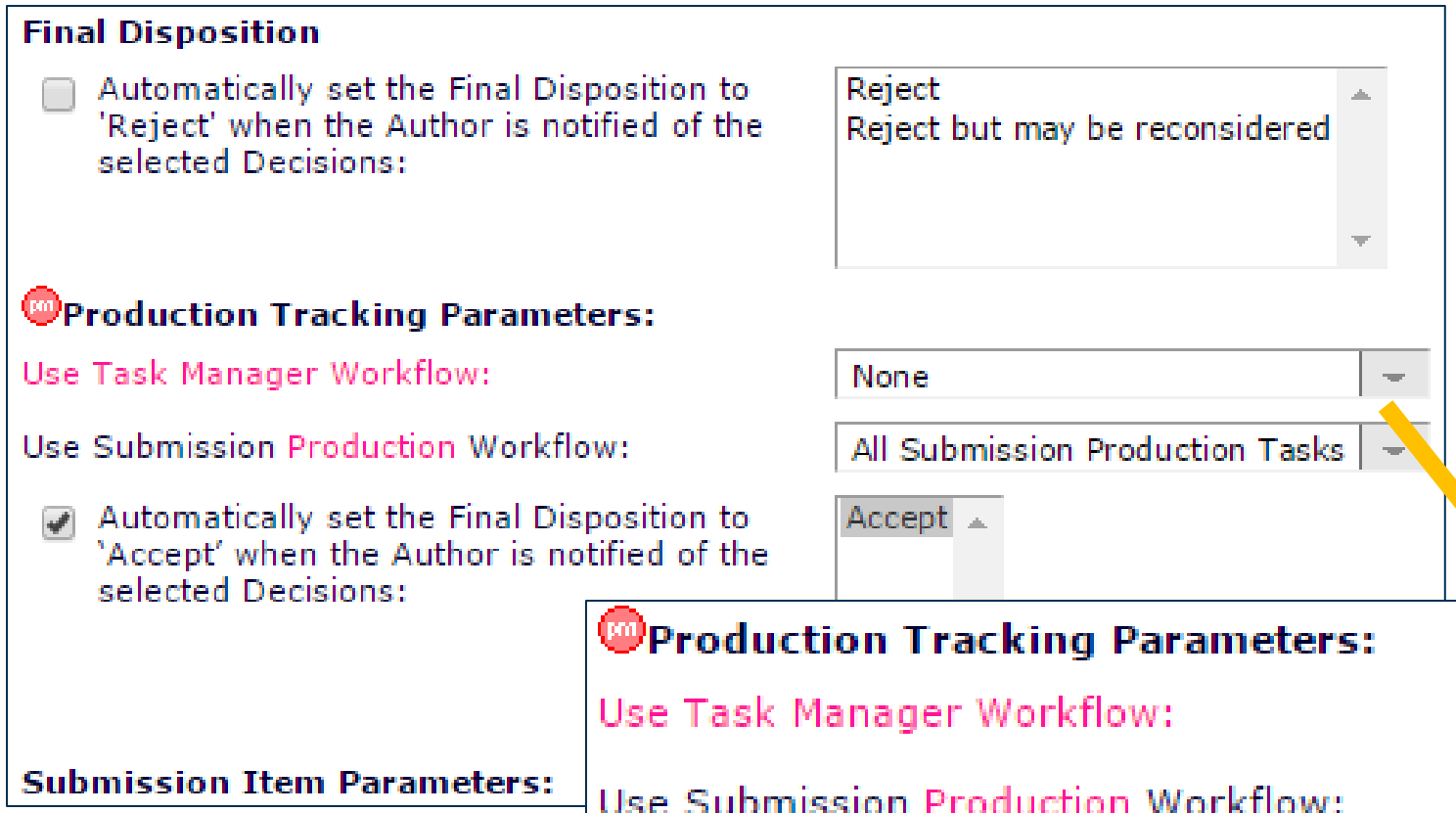
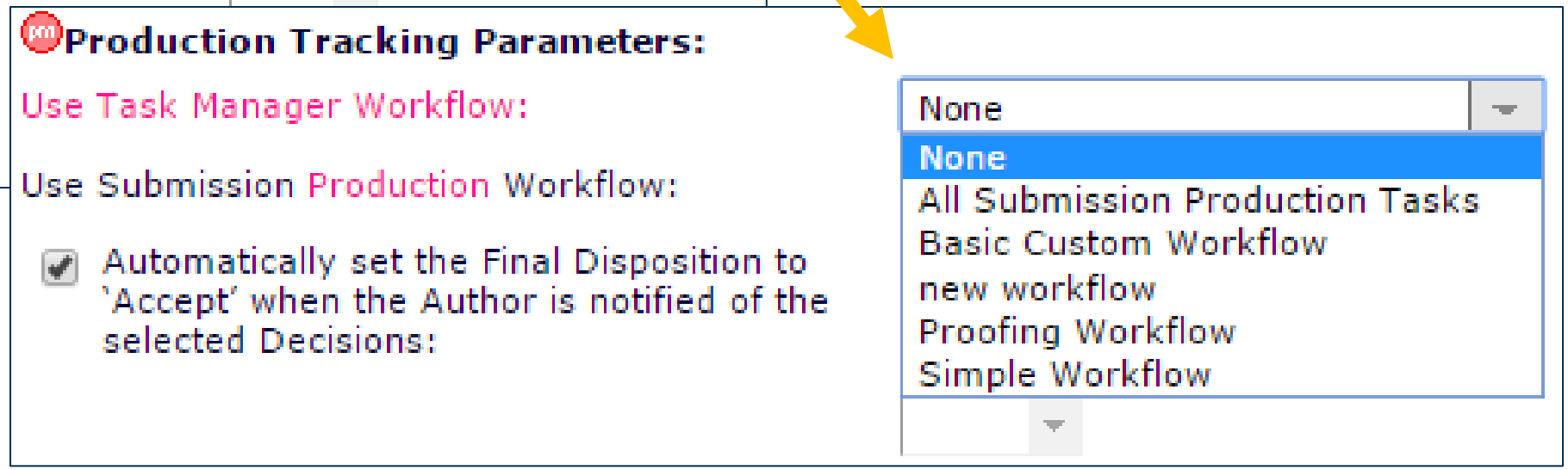
# Task Manager – Article Type

**None** – no tasks

**All Tasks** – any task that is configured

**Any Custom Workflow** – any configured workflow; consider creating Editorial workflows



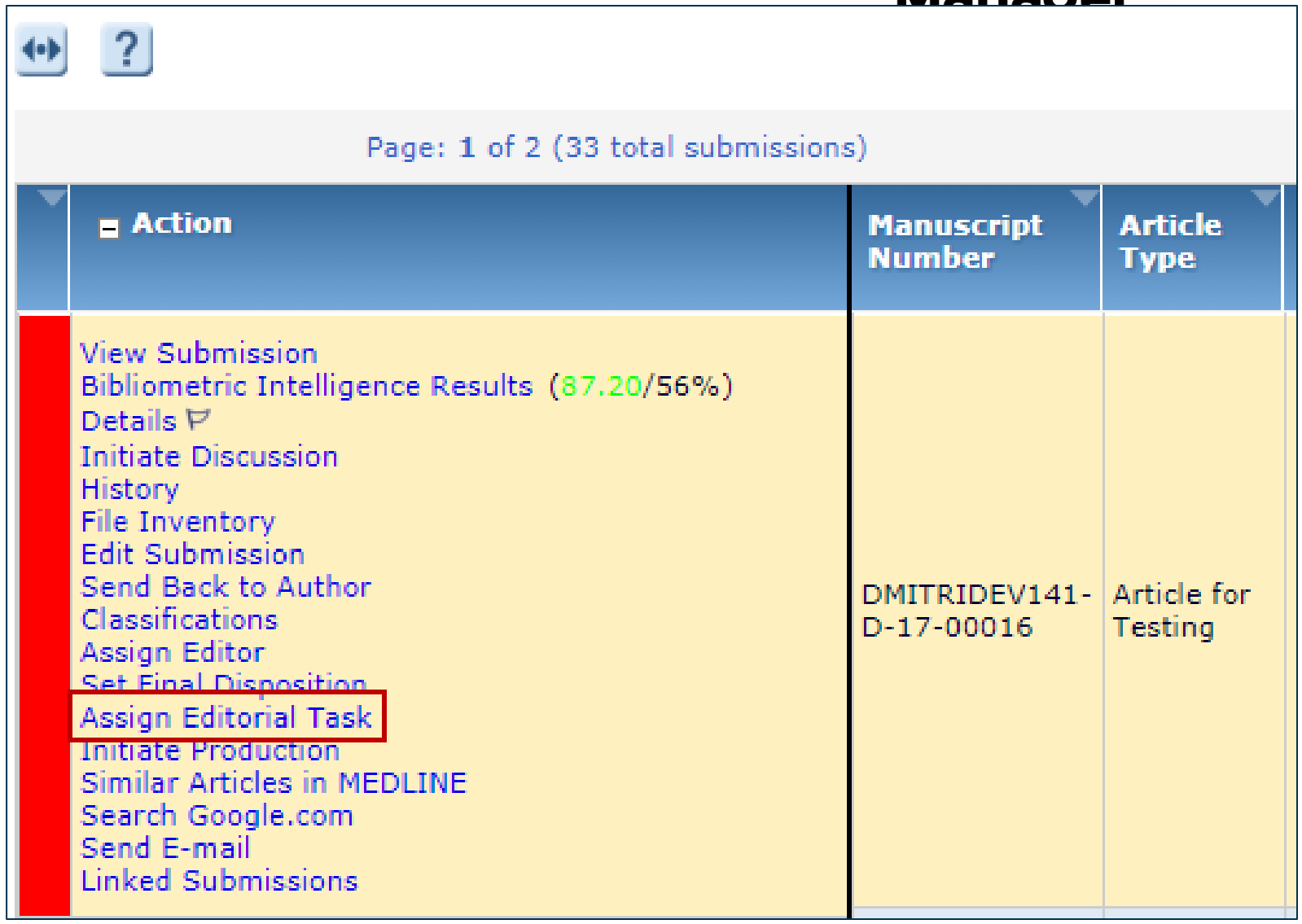



# Task Manager

"Tasks" can also be assigned from relevant folders in the Editor Main Menu by a user with "Assign Editorial Tasks in Task Manager" permission.

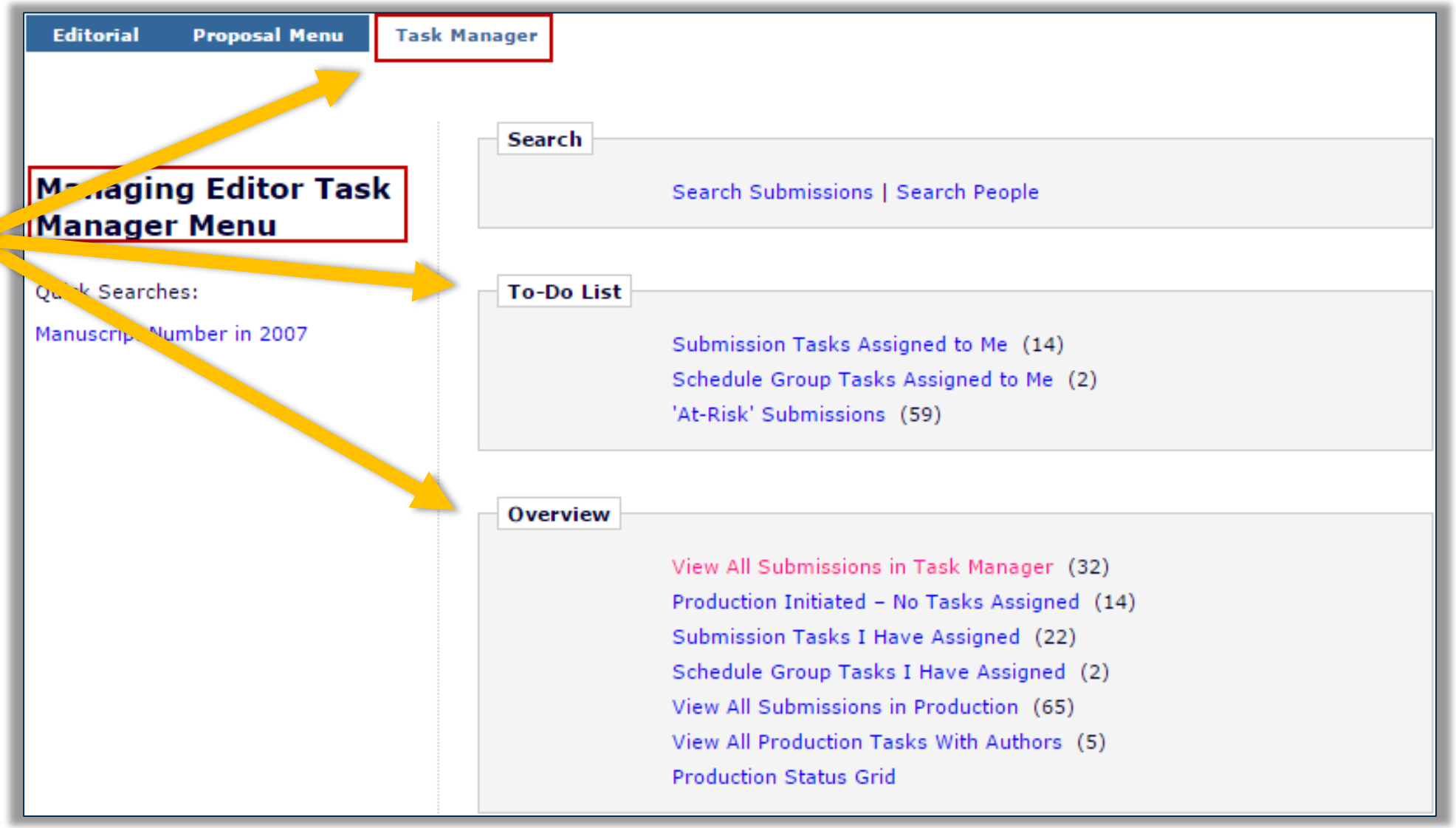
The "Assign Editorial Task" action link will display, but only for submissions where the Article Type has a Task Manager workflow selected.

First task can be automatically triggered at submission.



# Task Manager – 15.1

There is a separate Task Manager tab where users can manage, assign and complete editorial tasks

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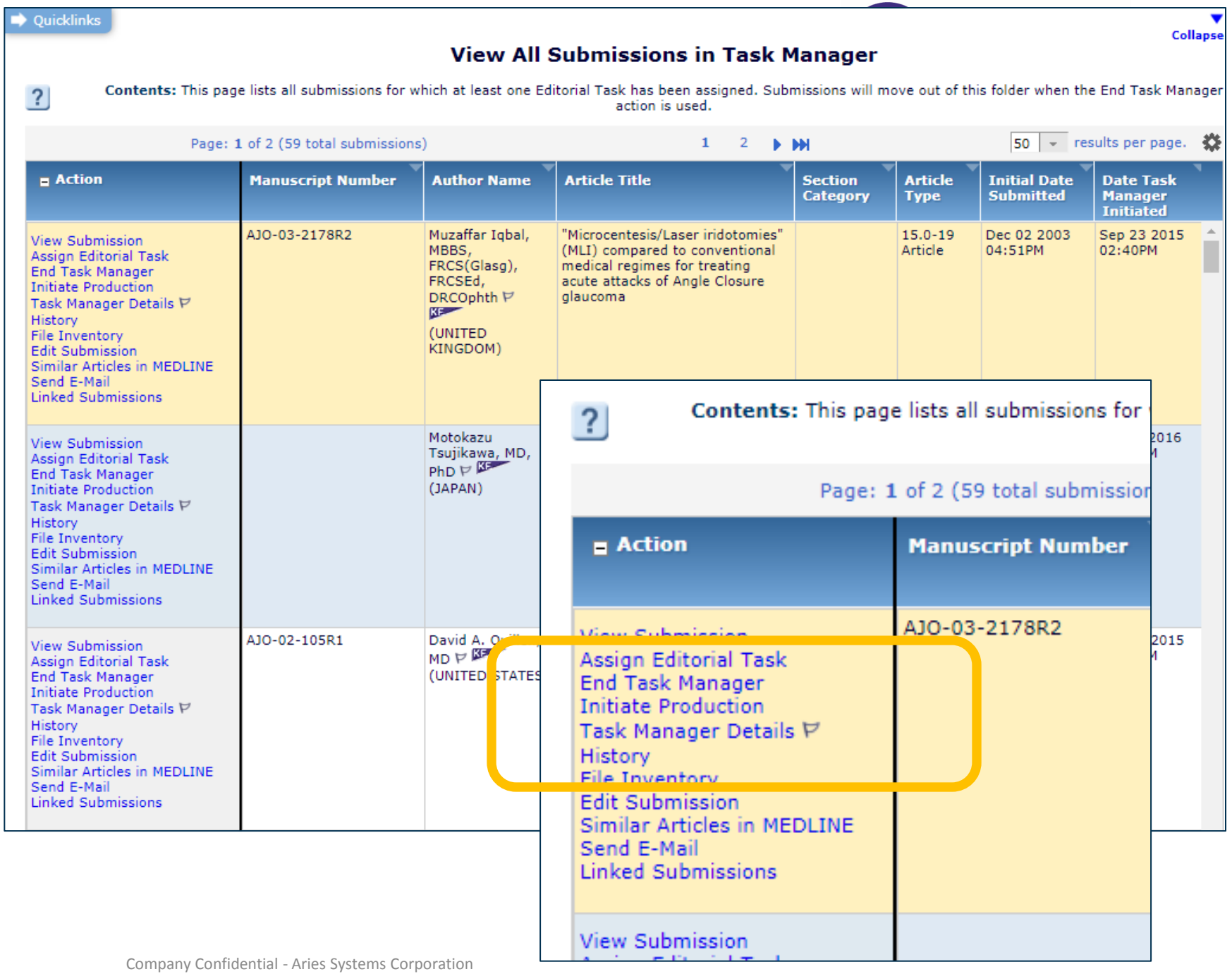
# Task Manager

Folders where Task Manager tasks can be found:

- View All Submissions in Task Manager (new)
- Tasks Assigned to Me
- Tasks I Have Assigned
- View All Tasks with Authors



# Task Manager

There is a new “Task Manager Status” column.

Production Task History indicates if a task is “Assigned in Task Manager.”

**STATUS HISTORY**

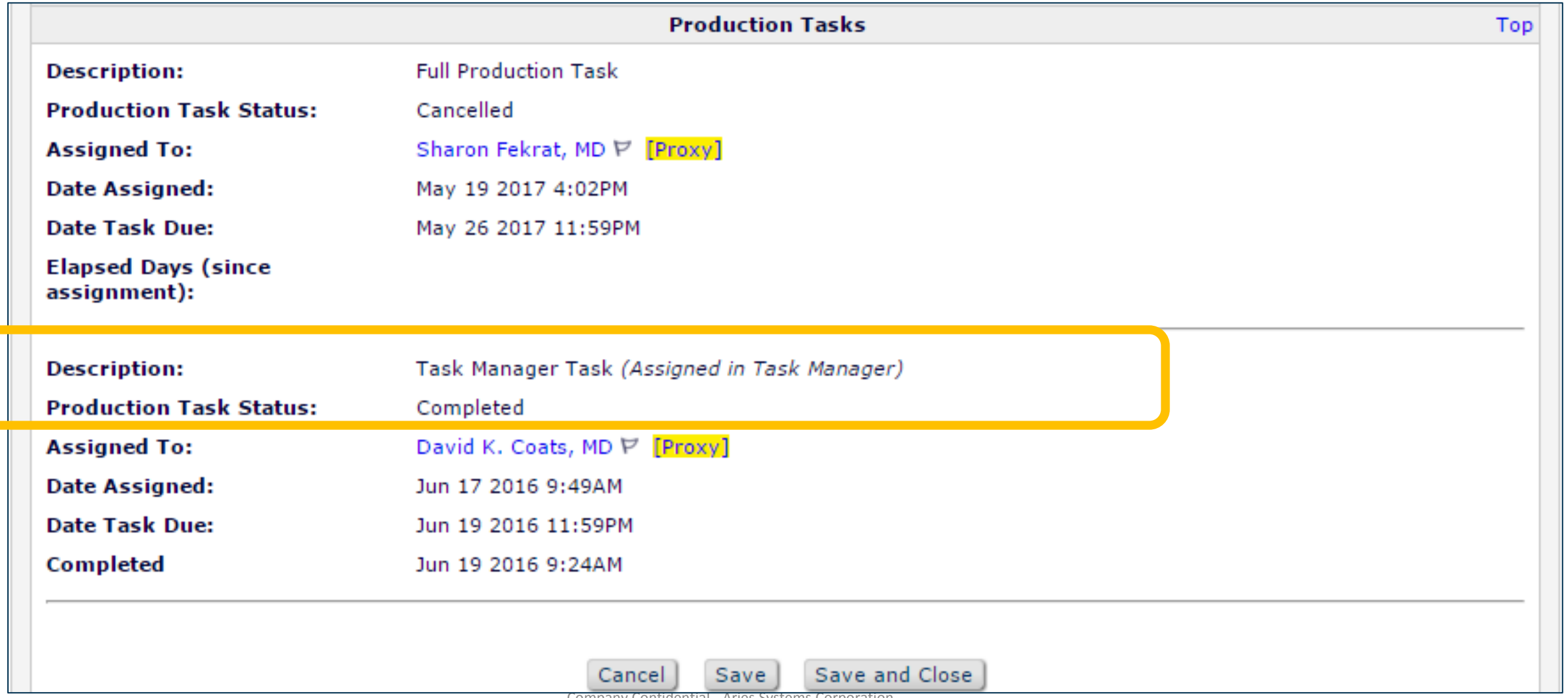
| Status Date | Document Status | Production Status | Task Manager Status | Status Days | Role Family | Revision | Operator |
|---|---|---|---|---|---|---|---|
| Dec 14 2017 4:10PM | | In Production | | 10 4 | | 0 | Ed J Editor, MD |
| Dec 14 2017 4:10PM | | Production Initiated | | --- | | 0 | Ed J Editor, MD |
| Nov 27 2017 11:52AM | | | Task Manager Completed | --- | | 0 | Ed J Editor, MD |
| Nov 25 2017 10:58AM | | | In Task Manager | 2 | | 0 | Ed J Editor, MD |
| Nov 25 2017 10:58AM | | | Returned to Task Manager | --- | | 0 | Ed J Editor |
| Nov 10 2017 5:00PM | | | Task Manager Completed | --- | | 0 | Ed J Editor, MD |
| Nov 5 2017 3:43PM | | | In Task Manager | 5 | | 0 | Ed J Editor, MD |
| Nov 5 2017 3:43PM | | | Task Manager Initiated | --- | | 0 | Ed J Editor, MD |
| Sep 5 2017 2:28PM | Submitted to Journal | | | 17 | EDITOR | 0 | Amy S Author [Proxied by Ed |

**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 |
|---|---|---|---|---|---|---|---|---|
| Task Manager Task *(Assigned in Task Manager)* | Nov 25 2017 10:58AM | Nov 29 2017 11:59PM | Louis B. Cantor, MD | Ed J Editor, MD | Completed | Nov 27 2017 11:52AM | Ed J Editor, MD | No Assigned Files |
| Data Task *(Assigned in Task Manager)* | Nov 5 2017 3:43PM | Nov 7 2017 11:59PM | Joseph Caprioli, MD | Ed J Editor, MD | Completed | Nov 6 2017 11:52AM | Ed J Editor, MD | Assignment Files |

# Task Manager

Details also indicates if a task is “Assigned in Task Manager.”



**Production Tasks** Top

| | |
|---|---|
| **Description:** | Full Production Task |
| **Production Task Status:** | Cancelled |
| **Assigned To:** | Sharon Fekrat, MD [Proxy] |
| **Date Assigned:** | May 19 2017 4:02PM |
| **Date Task Due:** | May 26 2017 11:59PM |
| **Elapsed Days (since assignment):** | |

| | |
|---|---|
| **Description:** | Task Manager Task *(Assigned in Task Manager)* |
| **Production Task Status:** | Completed |
| **Assigned To:** | David K. Coats, MD [Proxy] |
| **Date Assigned:** | Jun 17 2016 9:49AM |
| **Date Task Due:** | Jun 19 2016 11:59PM |
| **Completed** | Jun 19 2016 9:24AM |

Cancel Save Save and Close

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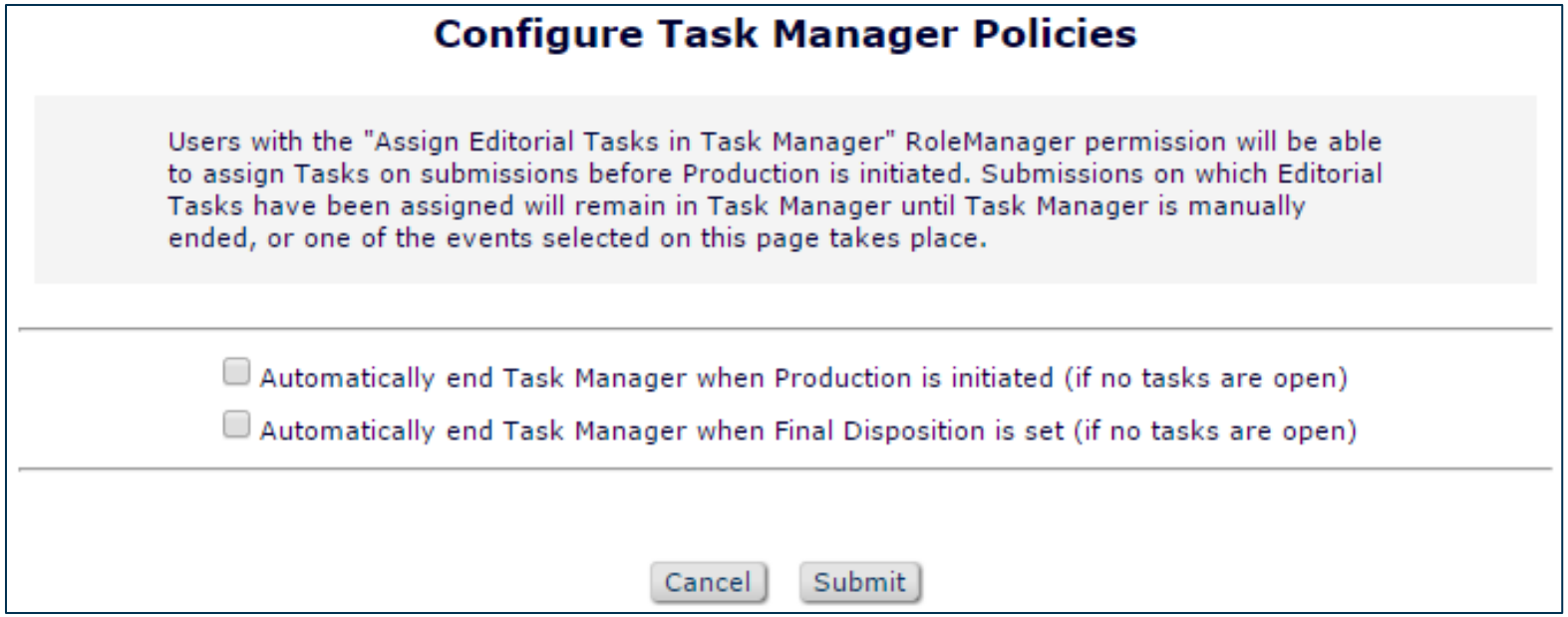
# Task Manager – Ending Task Manager

To complete an Editorial Task workflow:

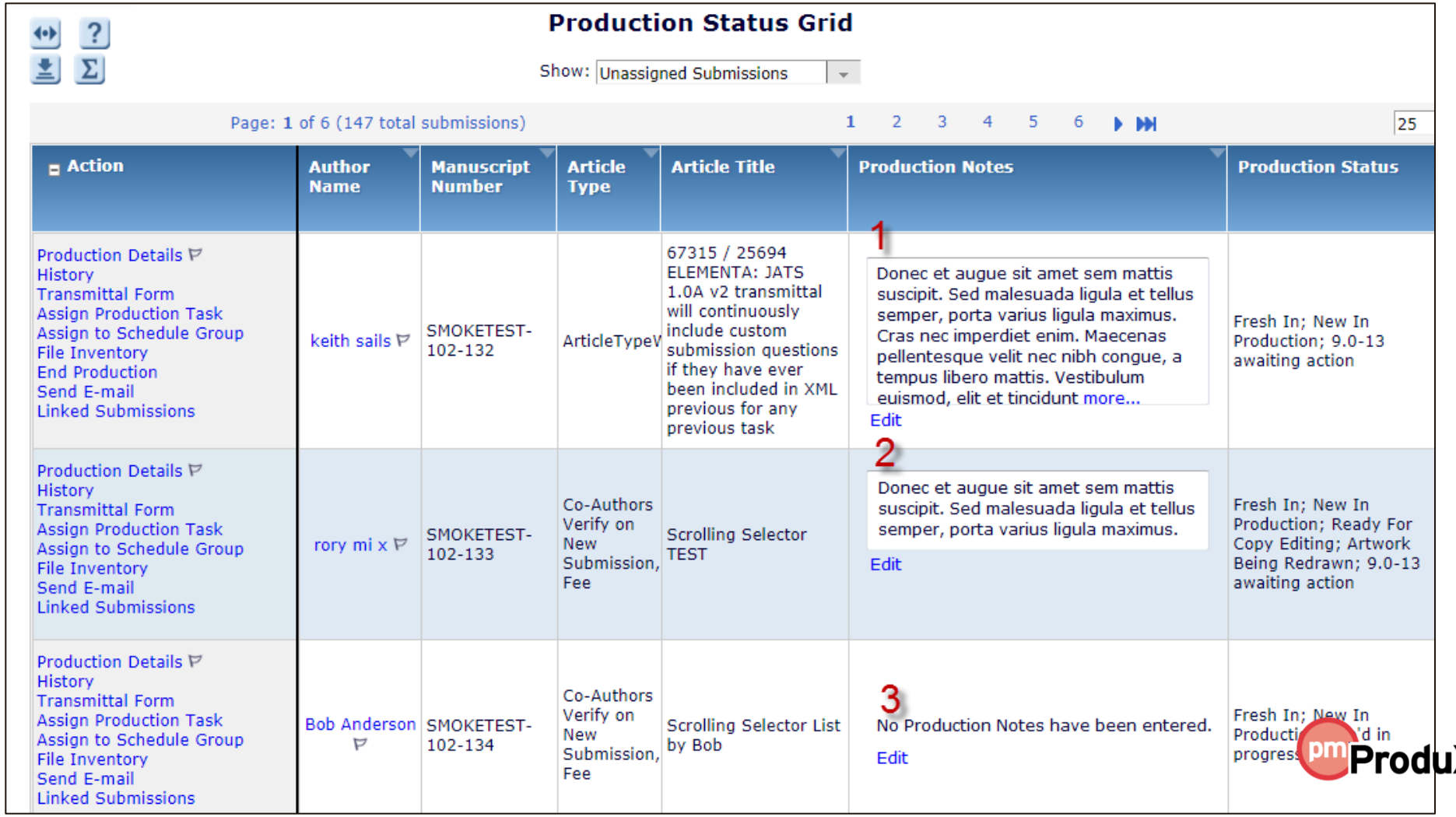
- Click “End Task Manager”
- Final task (configured to “End…Task Manager”) in a workflow is complete
- Set the Final Disposition*
- Initiate production*




*This setting will be overridden if any tasks assigned in Task Manager are still open when production is initiated.

# ProduXion Manager – 16.0

**Display Production Notes (Editable) on PSG**: See and edit the Production Notes directly in the Production Status Grid without opening the Details page.



**Production Status Grid**

Show: Unassigned Submissions

Page: 1 of 6 (147 total submissions) 1 2 3 4 5 6 25

| Action | Author Name | Manuscript Number | Article Type | Article Title | Production Notes | Production Status |
|---|---|---|---|---|---|---|
| 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 | keith sails | SMOKETEST-102-132 | ArticleTypeV | 67315 / 25694 ELEMENTA: JATS 1.0A v2 transmittal will continuously include custom submission questions if they have ever been included in XML previous for any previous task | 1<br>Donec et augue sit amet sem mattis suscipit. Sed malesuada ligula et tellus semper, porta varius ligula maximus. Cras nec imperdiet enim. Maecenas pellentesque velit nec nibh congue, a tempus libero mattis. Vestibulum euismod, elit et tincidunt more...<br>Edit | Fresh In; New In Production; 9.0-13 awaiting action |
| Production Details<br>History<br>Transmittal Form<br>Assign Production Task<br>Assign to Schedule Group<br>File Inventory<br>Send E-mail<br>Linked Submissions | rory mi x | SMOKETEST-102-133 | Co-Authors Verify on New Submission, Fee | Scrolling Selector TEST | 2<br>Donec et augue sit amet sem mattis suscipit. Sed malesuada ligula et tellus semper, porta varius ligula maximus.<br>Edit | Fresh In; New In Production; Ready For Copy Editing; Artwork Being Redrawn; 9.0-13 awaiting action |
| Production Details<br>History<br>Transmittal Form<br>Assign Production Task<br>Assign to Schedule Group<br>File Inventory<br>Send E-mail<br>Linked Submissions | Bob Anderson | SMOKETEST-102-134 | Co-Authors Verify on New Submission, Fee | Scrolling Selector List by Bob | 3<br>No Production Notes have been entered.<br>Edit | Fresh In; New In Producti[illegible]'d in progress |

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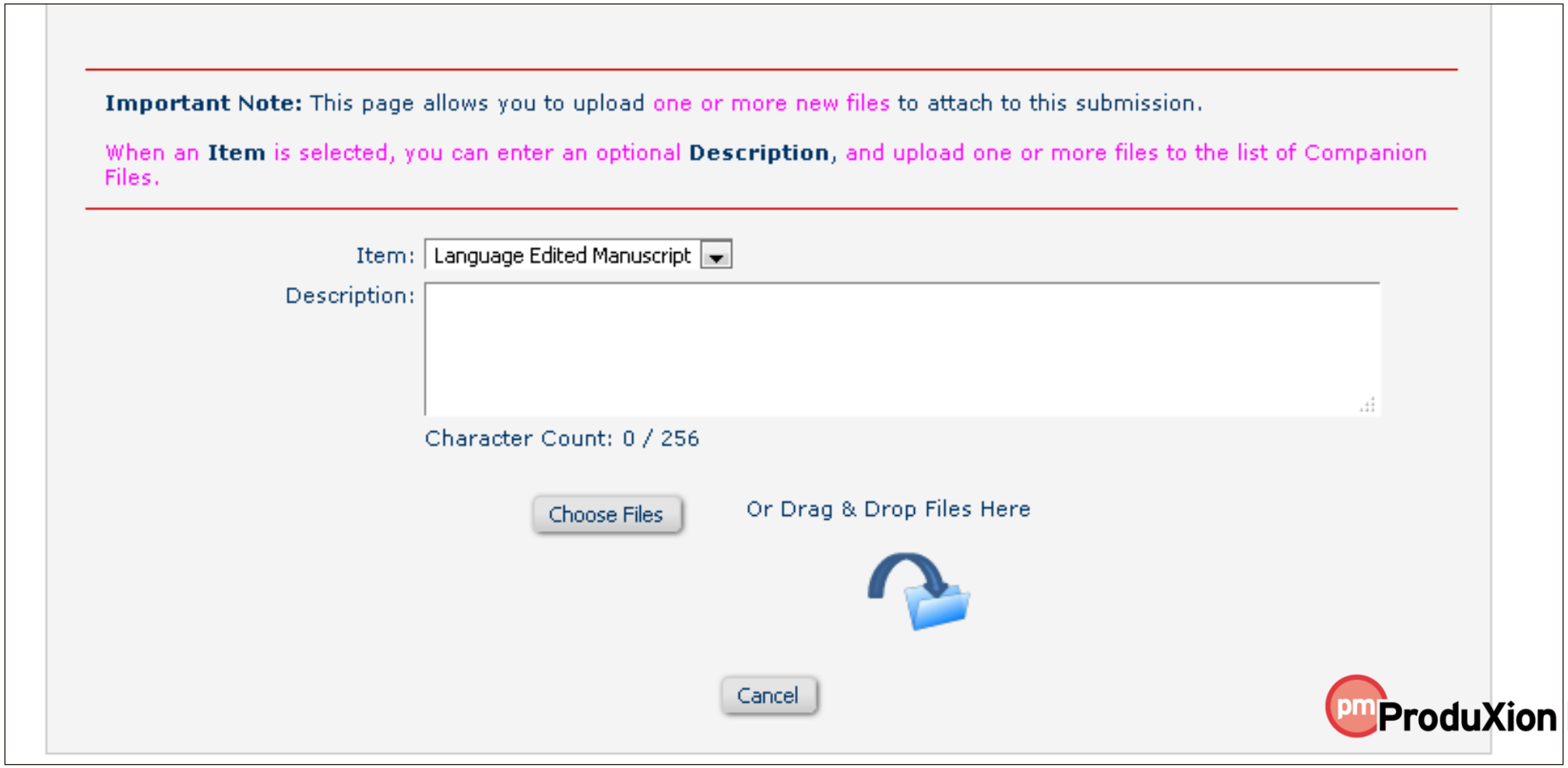
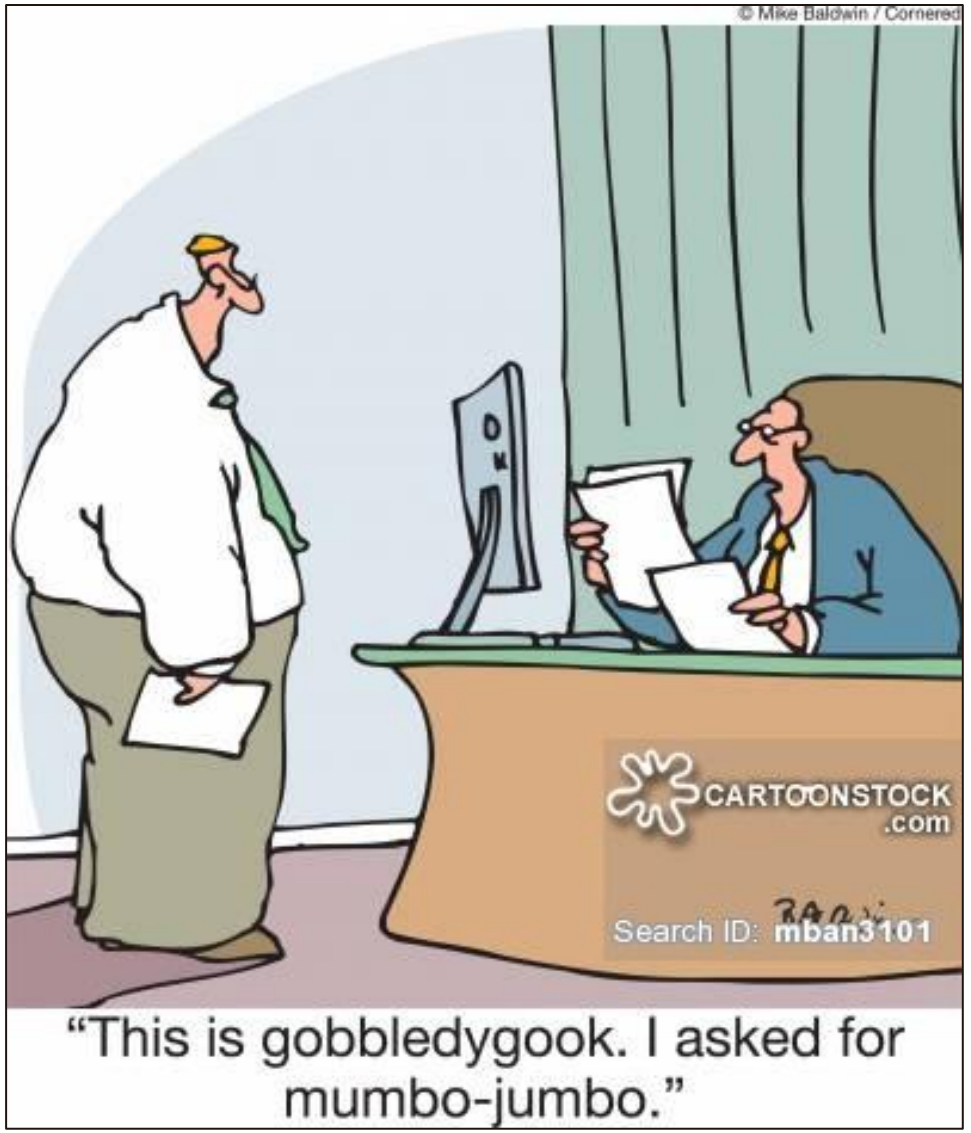
# ProduXion Manager – 16.0

**Drag and drop files for Production Tasks**: Today, file upload for submitting an article is feature-rich! This will be extended to PM file uploads.



# Reporting Fun!!!

Throw your random report queries at our crack team of reporting geniuses




pm ProduXion Manager®