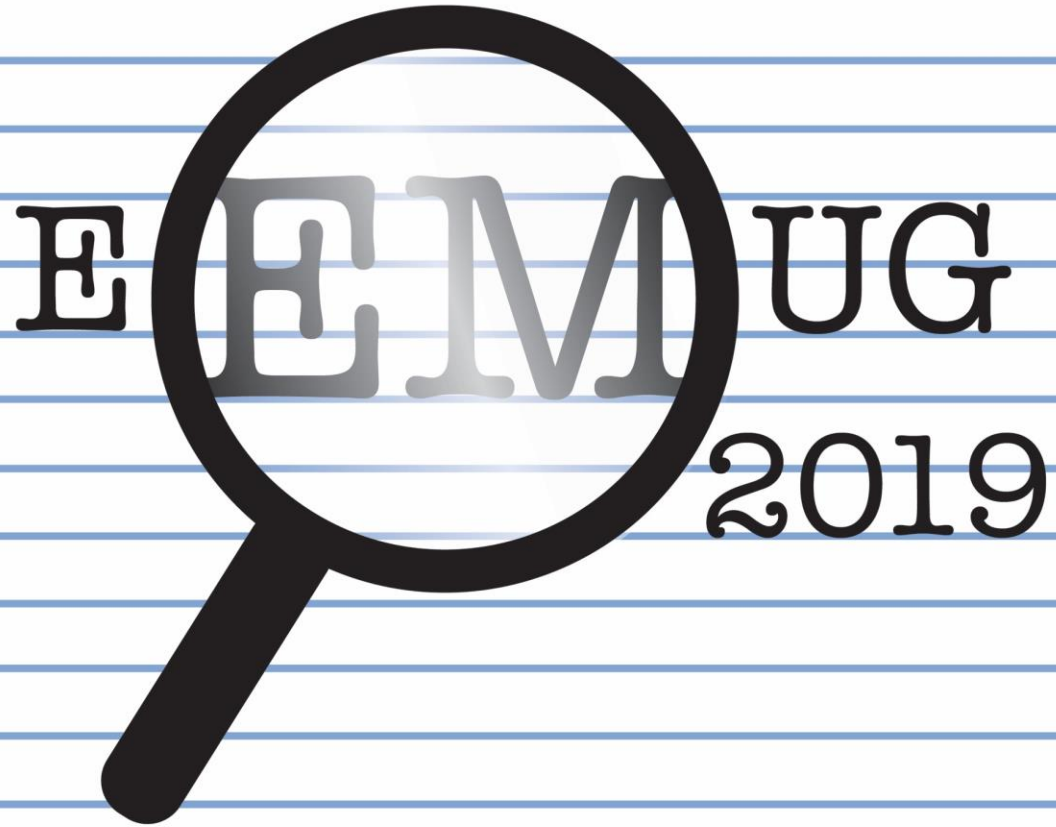


Welcome to



#EEMUG2019



Agenda



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

PM – Enterprise View

Stacey Lavelle

Senior Business Analyst

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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

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

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

- New Submissions**
- Editor Assignment**
- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**
- General Searching and Viewing**
- Edit Submission**
- Discussion Forums**
- Transmittal Form**
- Sending E-mail**
- Viewing and Editing People Data**
- Flag Icons**
- Proxy Activities**
- Administrative and Reporting Functions**
- Cross-Publication Login**
- ProduXion Manager**
- Enterprise View**
 - Access Enterprise View Tab
 - Search All Submissions in Enterprise View

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

Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

George Stanley

Self-Registered:
Jan 18, 2017

Last Modified:
Dec 11, 2018

User Information [Open Special Character Palette](#)

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Default Login Menu

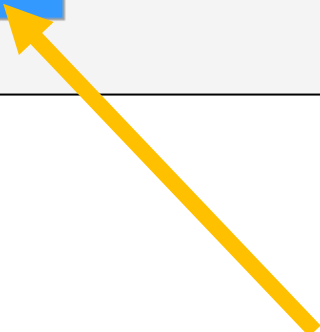
Available as a Reviewer?

Board Member?

Forbidden as a Reviewer?

Reviewer Role *

Publisher Role *



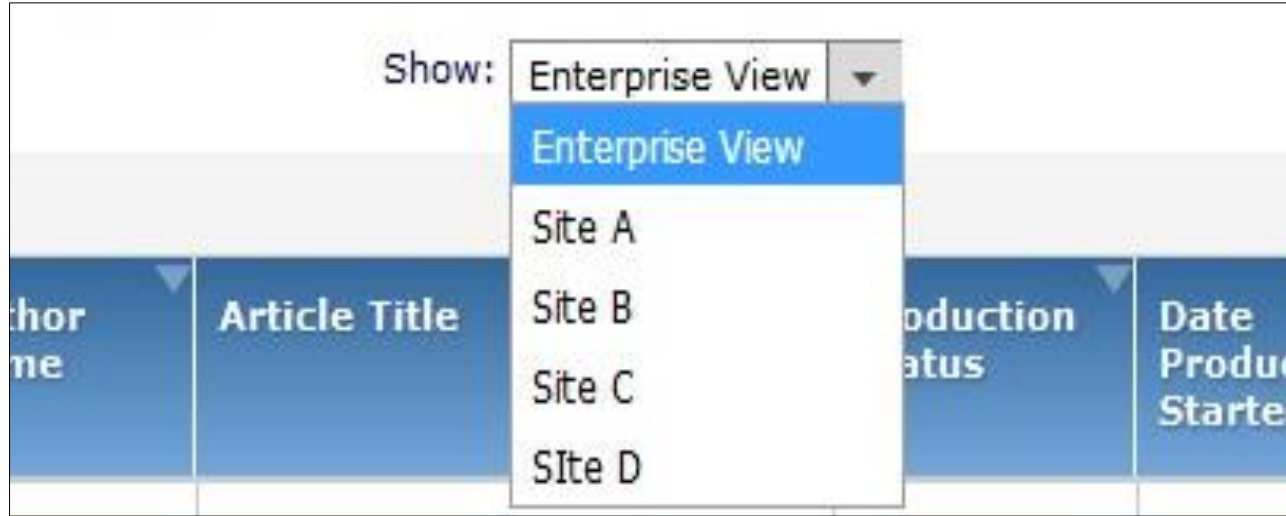
New Enterprise View Menu

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

The screenshot displays the Editorial Manager web interface. At the top, the logo "em Editorial Manager™" is visible on the left, and a navigation menu includes "HOME", "LOGOUT", "HELP", "REGISTER", "UPDATE MY INFORMATION", "JOURNAL OVERVIEW", "MAIN MENU", "CONTACT US", "SUBMIT A MANUSCRIPT", and "INSTRUCTIONS FOR AUTHORS". On the right, there is a "Go to:" dropdown menu set to "-- Search Page --", a "Role:" dropdown menu set to "Managing Editor", and a "Username: terry" label. A prominent red banner across the top reads "Important Message: Site under development. Do not use for live manuscript submission." Below this, a navigation bar contains three tabs: "Editorial", "Production Tasks", and "Enterprise View", with "Enterprise View" being the active tab. The main content area is titled "Managing Editor Enterprise View Menu" and is divided into three sections: "Enterprise View Search" with a "Search Submissions" link; "Enterprise View To-Do List" with two items: "Submission Tasks Assigned to Me (0)" and "Schedule Group Tasks Assigned to Me (0)"; and "Reports" with a "Cross-Publication Enterprise Analytics Reporting" link.

EV Folders

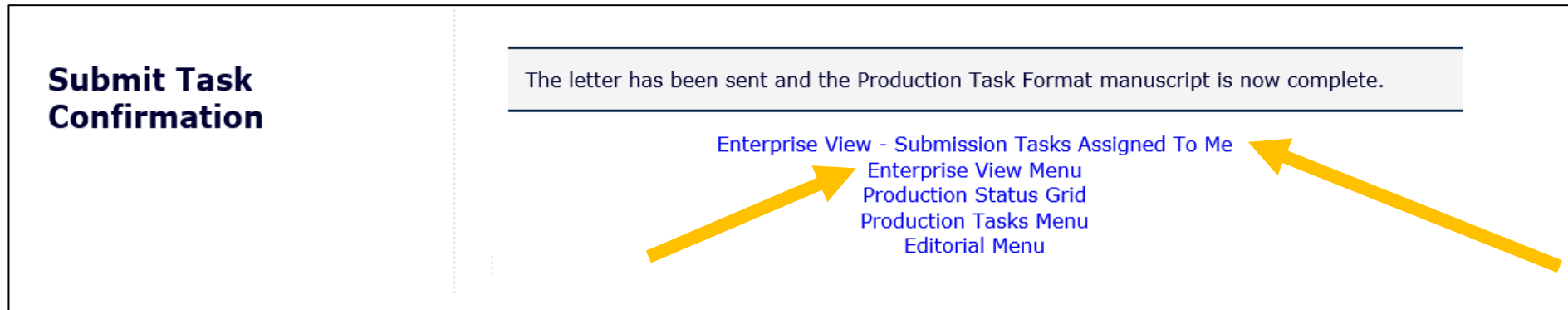
- EV folders take the existing PM folders and enhance them with:
 - Publication Code filter to refine the result set by publication



- 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

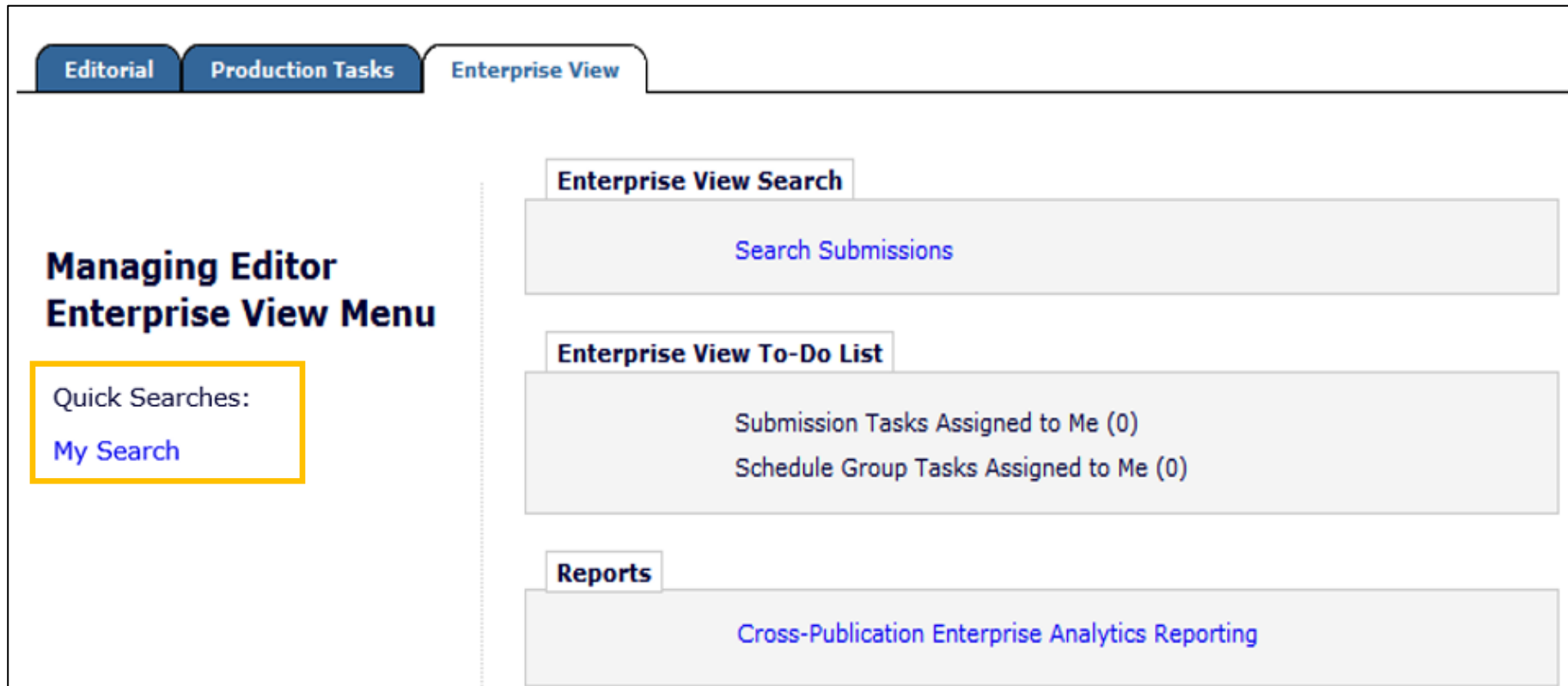


EV Search Submissions

- 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



The screenshot displays the 'Enterprise View' menu with three tabs: 'Editorial', 'Production Tasks', and 'Enterprise View'. The 'Enterprise View' tab is active. On the left, under 'Managing Editor Enterprise View Menu', a 'Quick Searches:' box highlights 'My Search'. The main content area is divided into three sections: 'Enterprise View Search' with a 'Search Submissions' link; 'Enterprise View To-Do List' with 'Submission Tasks Assigned to Me (0)' and 'Schedule Group Tasks Assigned to Me (0)'; and 'Reports' with a 'Cross-Publication Enterprise Analytics Reporting' link.

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

Batch Assign Production Tasks

Please click 'Proceed' for the publication on which you wish to batch assign production tasks.

Publication Code	Publication Name	Submissions Selected	
SALLYDEV151	Sally's Test Site	3	Proceed
STACEYDEV151	Stacey's Test Site with a Really Long Journal Name	6	Proceed
TONYDEV151	Tony'sTest Site	1	Proceed

[Return to Search Results](#)
[Enterprise View Menu](#)

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

Batch Assign Production Task Confirmation

Devang Shah has been assigned the production task Task to be batch assigned for the following submissions. A letter was sent:

- Manuscript Number: Unassigned, DOI: 10.1029/STACEYTEST71.105. Stacey J Lavelle (UNITED STATES): "Lyme Disease in Adolescents"
- Manuscript Number: STACEYTEST91-D-11-00007, DOI: 10.1029/STACEYTEST71.104. Stacey J Lavelle (UNITED STATES): "Very Important Research"

[Proceed with Next Task Assignment](#)
[Return to Search Results](#)
[Enterprise View Menu](#)

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

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	
<i>SALLYDEV151</i>	<i>Sally's Test Site</i>	-	<i>Complete</i>
<i>STACEYDEV151</i>	<i>Stacey's Test Site with a Really Long Journal Name</i>	-	<i>Complete</i>
<i>TONYDEV151</i>	<i>Tony'sTest Site</i>	-	<i>Complete</i>

[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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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.

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.

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.

Task Manager – Article Type

None – no tasks

All Tasks – any task that is configured

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

Final Disposition

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

Reject
Reject but may be reconsidered

Production Tracking Parameters:

Use Task Manager Workflow: None

Use Submission Production Workflow: All Submission Production Tasks

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

Accept

Production Tracking Parameters:

Use Task Manager Workflow: None

Use Submission Production Workflow:

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

None
None
All Submission Production Tasks
Basic Custom Workflow
new workflow
Proofing Workflow
Simple Workflow

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.

Page: 1 of 2 (33 total submissions)

Action	Manuscript Number	Article Type
<ul style="list-style-type: none">View SubmissionBibliometric Intelligence Results (87.20/56%)Details ▾Initiate DiscussionHistoryFile InventoryEdit SubmissionSend Back to AuthorClassificationsAssign EditorSet Final DispositionAssign Editorial TaskInitiate ProductionSimilar Articles in MEDLINESearch Google.comSend E-mailLinked Submissions	DMITRIDEV141-D-17-00016	Article for Testing

Task Manager – 15.1



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

The screenshot shows a web application interface with three tabs at the top: 'Editorial', 'Proposal Menu', and 'Task Manager'. The 'Task Manager' tab is highlighted with a red box. On the left side, there is a 'Managing Editor Task Manager Menu' also highlighted with a red box. Three yellow arrows point from this menu to the 'Task Manager' tab, the 'Search' section, and the 'Overview' section. The main content area is divided into three sections: 'Search' with a search bar containing 'Search Submissions | Search People'; 'To-Do List' with a list of tasks: 'Submission Tasks Assigned to Me (14)', 'Schedule Group Tasks Assigned to Me (2)', and ''At-Risk' Submissions (59)'; and 'Overview' with a list of links: 'View All Submissions in Task Manager (32)', 'Production Initiated - No Tasks Assigned (14)', 'Submission Tasks I Have Assigned (22)', 'Schedule Group Tasks I Have Assigned (2)', 'View All Submissions in Production (65)', 'View All Production Tasks With Authors (5)', and 'Production Status Grid'.

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

Quicklinks Collapse

View All Submissions in Task Manager

Contents: This page lists all submissions for which at least one Editorial Task has been assigned. Submissions will move out of this folder when the End Task Manager action is used.

Page: 1 of 2 (59 total submissions) 1 2 ▶▶▶ 50 results per page. ⚙️

Action	Manuscript Number	Author Name	Article Title	Section Category	Article Type	Initial Date Submitted	Date Task Manager Initiated
View Submission Assign Editorial Task End Task Manager Initiate Production Task Manager Details ▾ History File Inventory Edit Submission Similar Articles in MEDLINE Send E-Mail Linked Submissions	AJO-03-2178R2	Muzaffar Iqbal, MBBS, FRCS(Glasg), FRCSEd, DRCOPhth ▾ <small>(UNITED KINGDOM)</small>	"Microcentesis/Laser iridotomies" (MLI) compared to conventional medical regimes for treating acute attacks of Angle Closure glaucoma		15.0-19 Article	Dec 02 2003 04:51PM	Sep 23 2015 02:40PM
View Submission Assign Editorial Task End Task Manager Initiate Production Task Manager Details ▾ History File Inventory Edit Submission Similar Articles in MEDLINE Send E-Mail Linked Submissions		Motokazu Tsujikawa, MD, PhD ▾ <small>(JAPAN)</small>					
View Submission Assign Editorial Task End Task Manager Initiate Production Task Manager Details ▾ History File Inventory Edit Submission Similar Articles in MEDLINE Send E-Mail Linked Submissions	AJO-02-105R1	David A. O' ▾ <small>(UNITED STATES)</small>					

Contents: This page lists all submissions for

Page: 1 of 2 (59 total submission

Action	Manuscript Number
View Submission Assign Editorial Task End Task Manager Initiate Production Task Manager Details ▾ History File Inventory Edit Submission Similar Articles in MEDLINE Send E-Mail Linked Submissions	AJO-03-2178R2
View Submission Assign Editorial Task End Task Manager Initiate Production Task Manager Details ▾ History File Inventory Edit Submission Similar Articles in MEDLINE Send E-Mail Linked Submissions	

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):		
<hr/>		
Description:	Task Manager Task (<i>Assigned in Task Manager</i>)	
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	
<hr/>		
<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Save and Close"/>		

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*

Configure Task Manager Policies

Users with the "Assign Editorial Tasks in Task Manager" RoleManager permission will be able to assign Tasks on submissions before Production is initiated. Submissions on which Editorial Tasks have been assigned will remain in Task Manager until Task Manager is manually ended, or one of the events selected on this page takes place.

Automatically end Task Manager when Production is initiated (if no tasks are open)

Automatically end Task Manager when Final Disposition is set (if no tasks are open)

*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: <input type="text" value="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 ▾ History Transmittal Form Assign Production Task Assign to Schedule Group File Inventory End Production Send E-mail 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 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... Edit	Fresh In; New In Production; 9.0-13 awaiting action
Production Details ▾ History Transmittal Form Assign Production Task Assign to Schedule Group File Inventory Send E-mail Linked Submissions	rory mi x ▾	SMOKETEST-102-133	Co-Authors Verify on New Submission, Fee	Scrolling Selector TEST	2 Donec et augue sit amet sem mattis suscipit. Sed malesuada ligula et tellus semper, porta varius ligula maximus. Edit	Fresh In; New In Production; Ready For Copy Editing; Artwork Being Redrawn; 9.0-13 awaiting action
Production Details ▾ History Transmittal Form Assign Production Task Assign to Schedule Group File Inventory Send E-mail Linked Submissions	Bob Anderson ▾	SMOKETEST-102-134	Co-Authors Verify on New Submission, Fee	Scrolling Selector List by Bob	3 No Production Notes have been entered. Edit	Fresh In; New In Production; Ready For Copy Editing; Artwork Being Redrawn; 9.0-13 awaiting action

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.

Important Note: This page allows you to upload **one or more new files** to attach to this submission.


When an **Item** is selected, you can enter an optional **Description**, and upload one or more files to the list of Companion Files.


Item: ▼

Description:

Character Count: 0 / 256

Or Drag & Drop Files Here





Reporting Fun!!!

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

