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ProduXion Manager Automation

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Agenda

- Pre-Version 12.0 Automation
- Version 12.0 Automation

Pre-Version 12.0 Automation Overview

- Notify Author can ***automatically Set Final Disposition*** and ***Initiate Production***
- Setting Final Disposition (manually) to 'Accept' or 'Accept on Submission' can ***automatically Initiate Production***
- Initiating Production can ***automatically assign First Task in Submission Production Task Workflow***
- Submitting a task can ***automatically assign next task in Submission Production Task Workflow,*** or ***End Production***
- Submitting a task (via FTP) ***can automatically update submission and Schedule Group metadata***
- Closing a Schedule Group ***will End Production on all submissions in the group*** (that have no open tasks)

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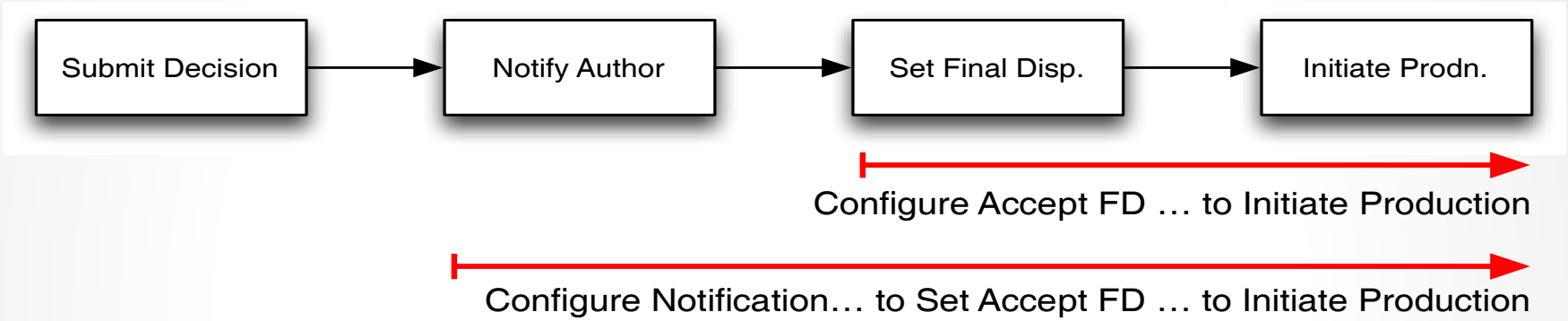
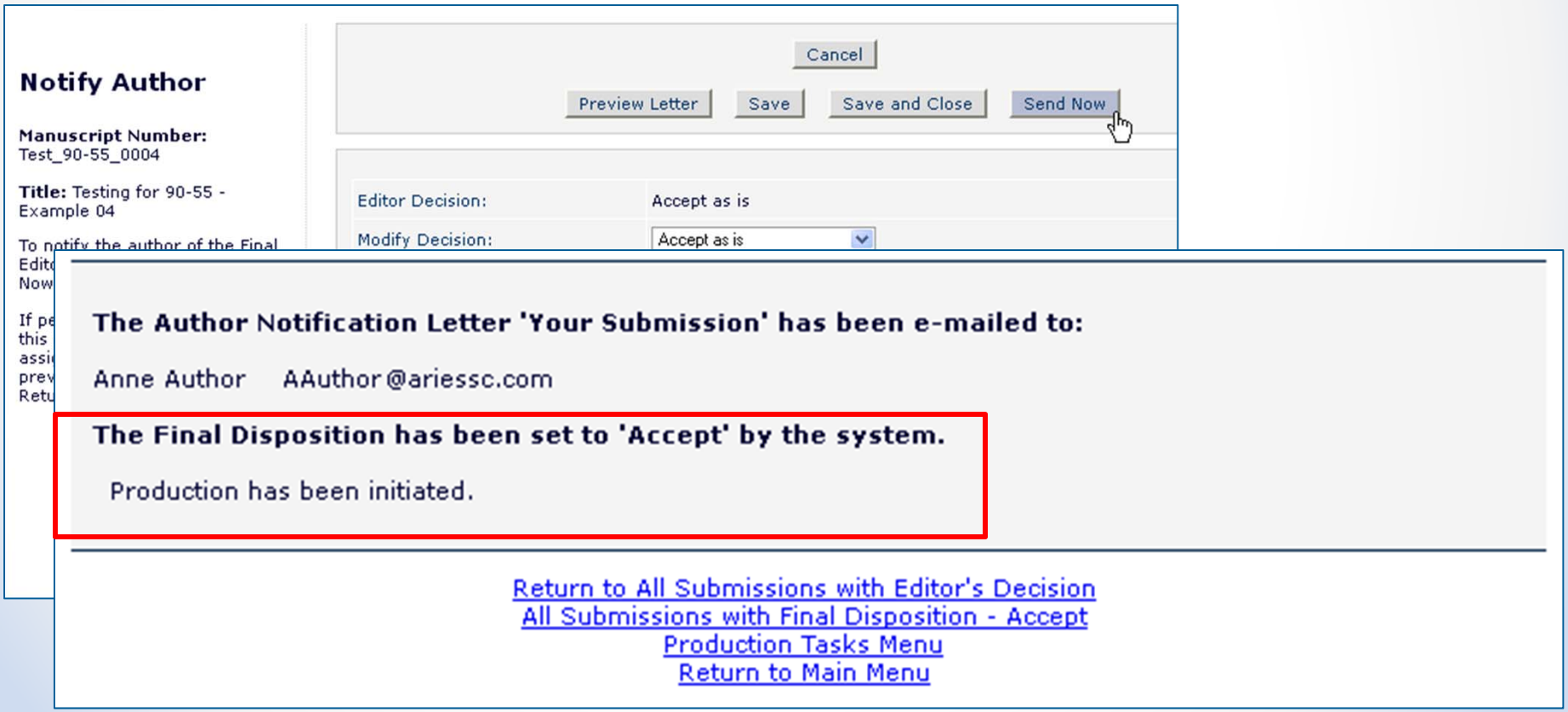
Automating Production Initiation



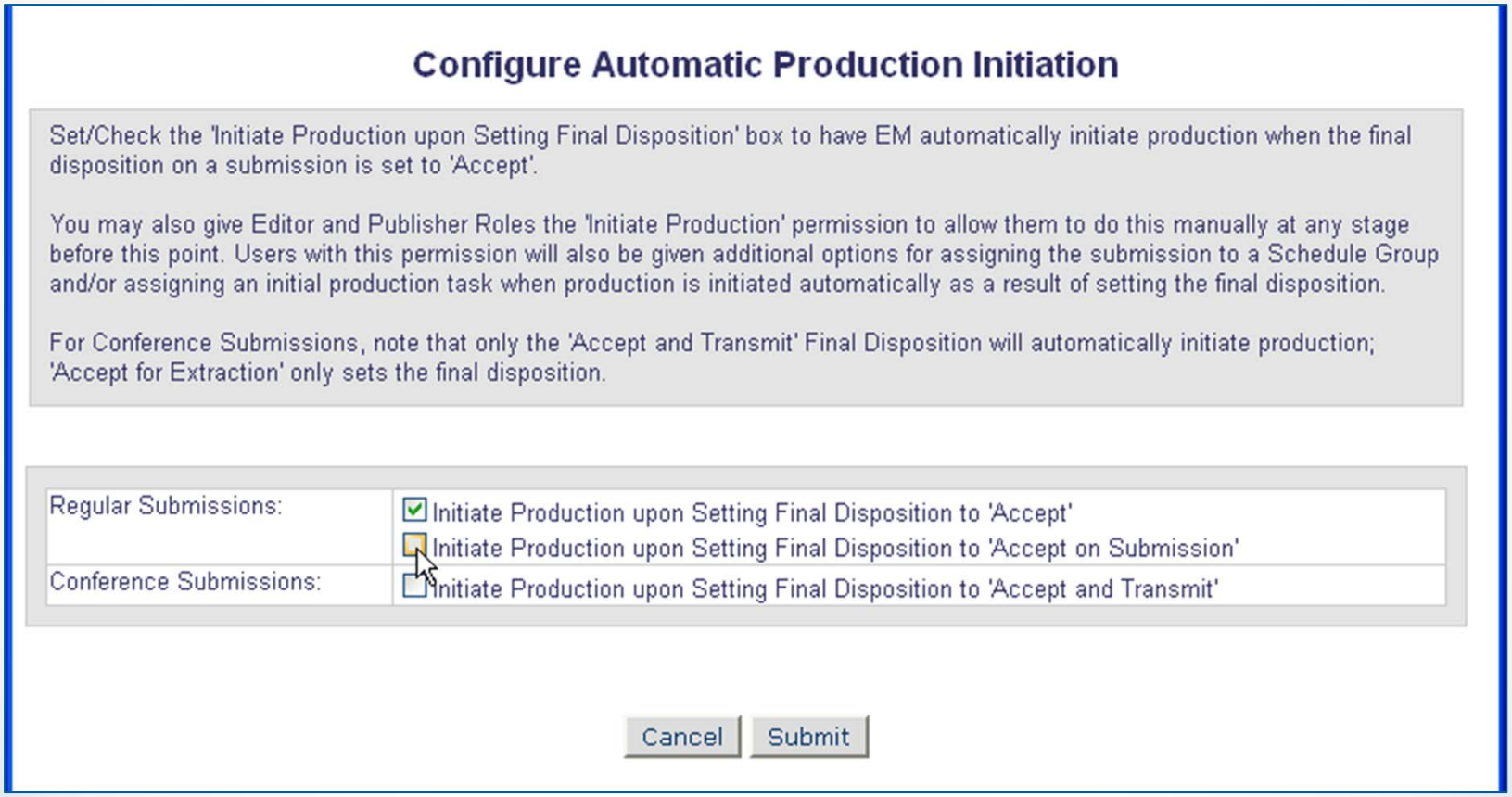
Author Notification triggers FD and Initiate Production

- Triggered when Editor Sends Accept Notification to Author
- Bypasses the Assign Production Task/Assign to Schedule Group UI; editor remains solely within Editorial Flow



Configuration: Author Notification sets FD to Accept – PolicyManager, Edit Article Type

Configuration: FD triggers Automatic Production Initiation - PolicyManager

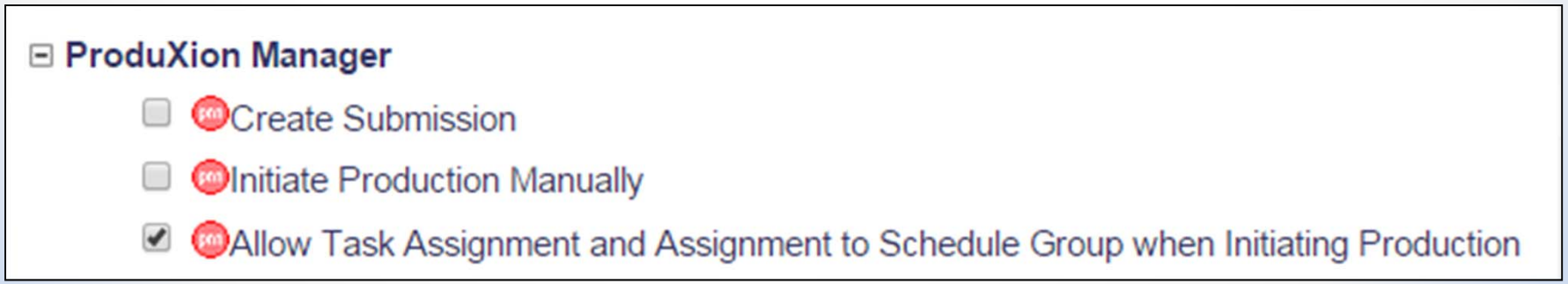


Manual Final Disposition triggers Initiate Production

- Based on RoleManager permission ‘Set Final Disposition’ and PolicyManager settings on ‘Configure Automatic Production Initiation’
- Can be used when Editor manually sets FD to ‘Accept’ or ‘Accept on Submission’

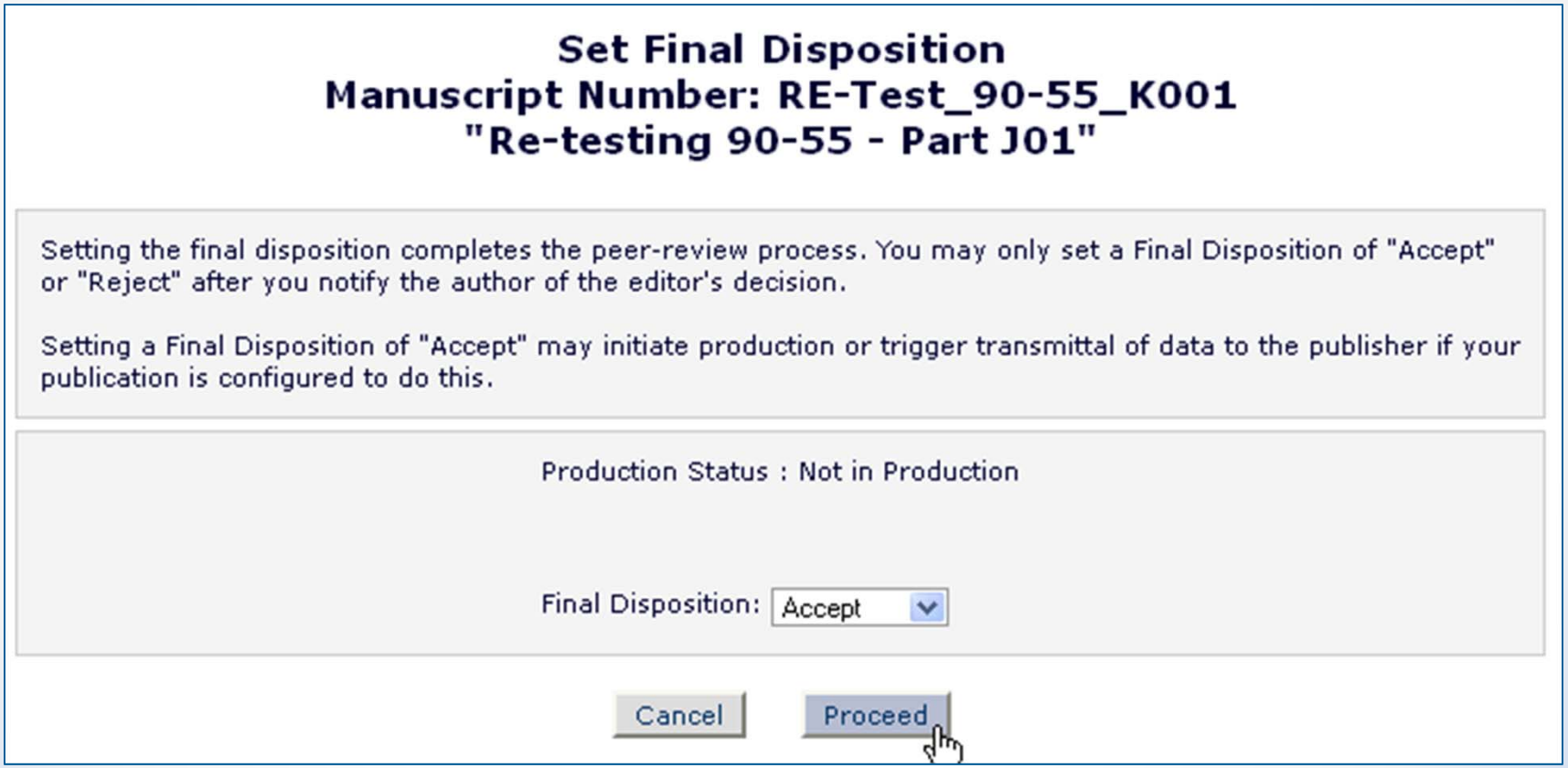
Manual Final Disposition triggers Initiate Production

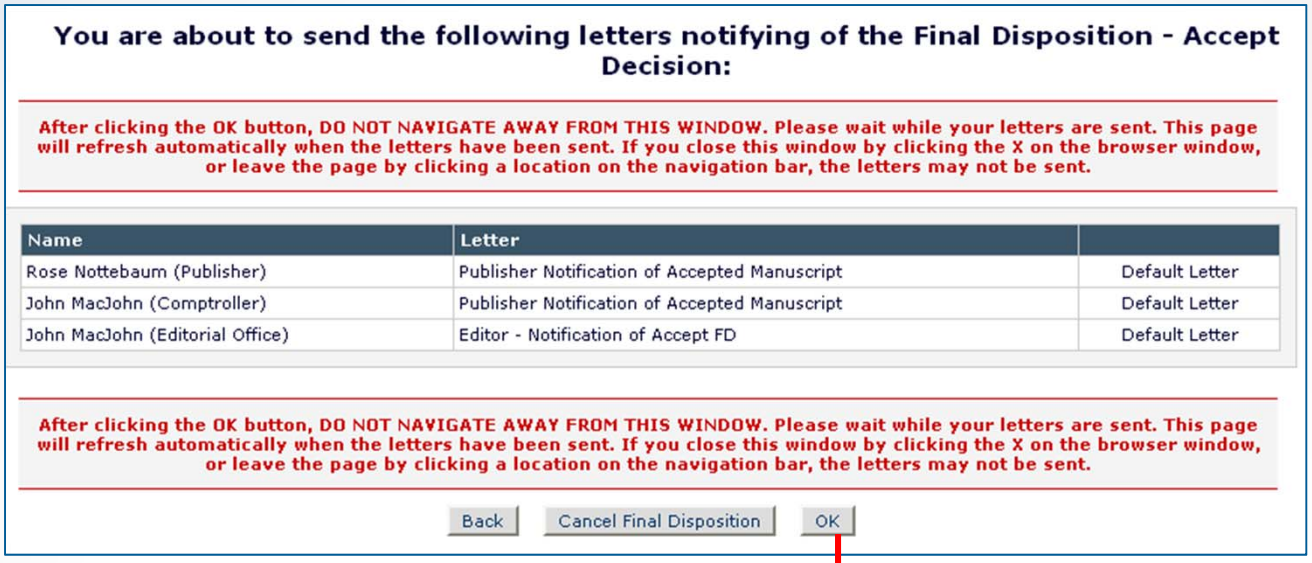
- Editor first proceeds through the Transmittal Form process. At the final page, confirming the FD will Initiate Production automatically (if configured)
- What the user sees after setting FD depends on their Role Permissions:
  - Editor can assign the submission to a Schedule Group (and/or assign a task) OR
  - Editor sees no production-related UI



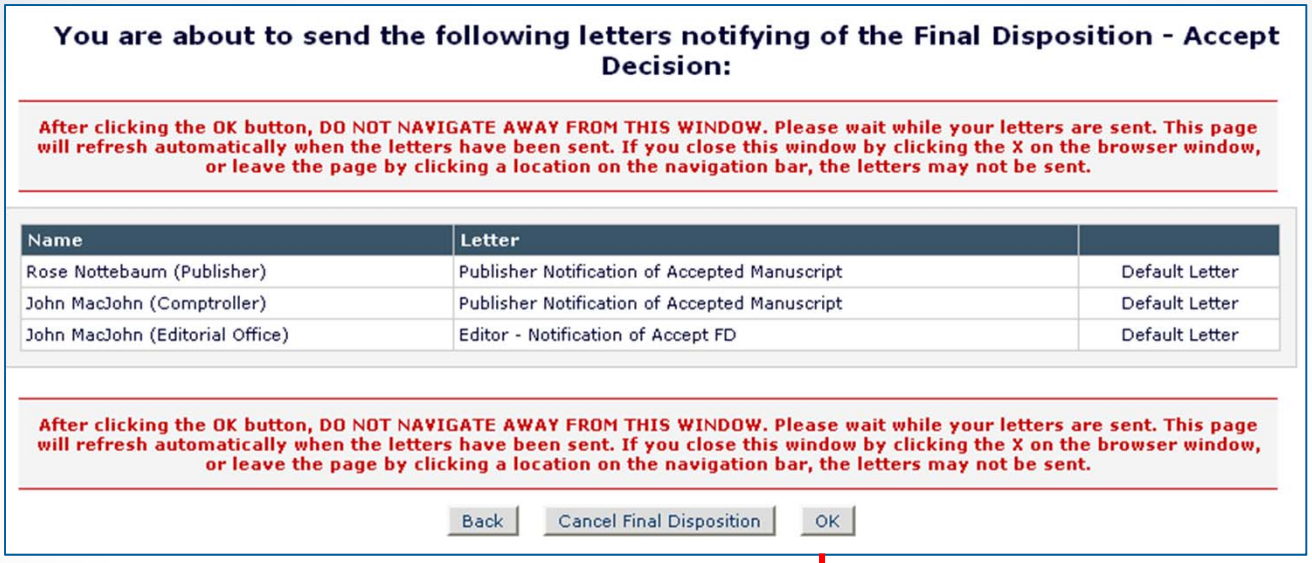
Manual Final Disposition Triggers Initiate Production

- For an Article Type NOT configured to set the FD Automatically, Automatic Production Initiation can trigger when the FD is manually set to 'Accept' or 'Accept on Submission'

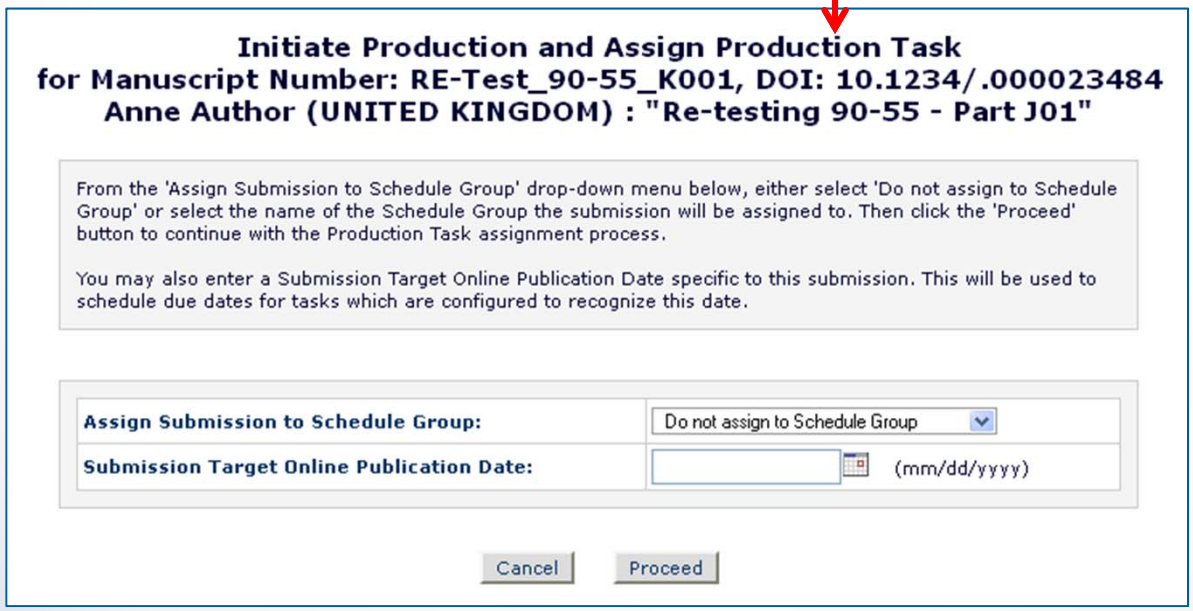


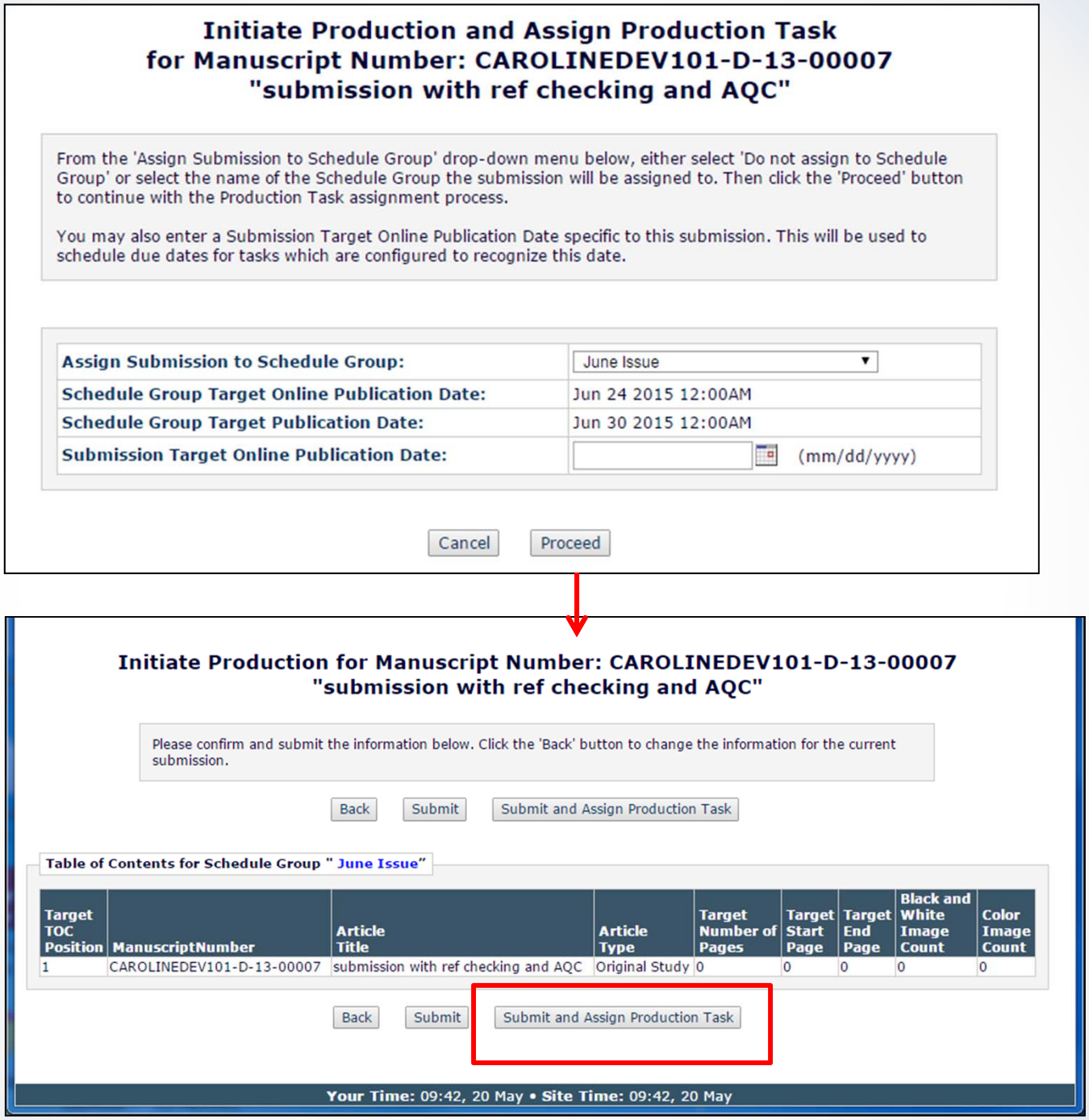


Editor ***without*** 'Allow task assignment…' permission is returned to originating folder or search submissions interface; production has been initiated



Editor *with* 'Allow task assignment…' permission can immediately assign a SG and Production Task




Initiate Production and Assign Production Task
for Manuscript Number: CAROLINEDEV101-D-13-00007
"submission with ref checking and AQC"
From the 'Assign Submission to Schedule Group' drop-down menu below, either select 'Do not assign to Schedule Group' or select the name of the Schedule Group the submission will be assigned to. Then click the 'Proceed' button to continue with the Production Task assignment process.
You may also enter a Submission Target Online Publication Date specific to this submission. This will be used to schedule due dates for tasks which are configured to recognize this date.
Assign Submission to Schedule Group:
June Issue
Schedule Group Target Online Publication Date:
Jun 24 2015 12:00AM
Schedule Group Target Publication Date:
Jun 30 2015 12:00AM
Submission Target Online Publication Date:
(mm/dd/yyyy)
Cancel
Proceed
Initiate Production for Manuscript Number: CAROLINEDEV101-D-13-00007
"submission with ref checking and AQC"
Please confirm and submit the information below. Click the 'Back' button to change the information for the current submission.
Back
Submit
Submit and Assign Production Task
Table of Contents for Schedule Group " June Issue"
Target TOC Position
ManuscriptNumber
Article Title
Article Type
Target Number of Pages
Target Start Page
Target End Page
Black and White Image Count
Color Image Count
1
CAROLINEDEV101-D-13-00007
submission with ref checking and AQC
Original Study
0
0
0
0
0
Back
Submit
Submit and Assign Production Task
Your Time: 09:42, 20 May • Site Time: 09:42, 20 May

Initiating Production Other Options

- Production Initiation can be done manually via the Initiate Production link at any time prior to Author notification or setting the FD.
  - Based on RoleManager permission 'Initiate Production Manually'
- Submissions can be imported directly into Production if you don't use EM

Automation Overview: Pre-Version 12.0

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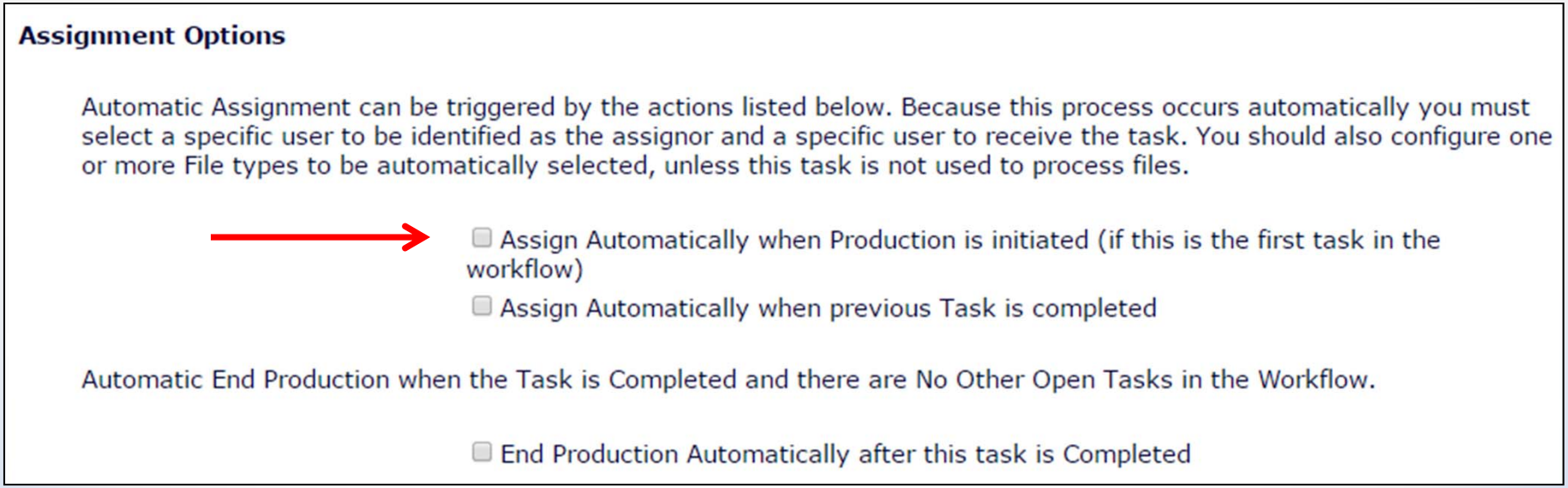
- Closing a Schedule Group ***will End Production on all submissions in the group*** (that have no open tasks)

Automatically Assign First Task in Workflow

- Select Submission Production task setting – 'Assign Automatically when Production is initiated (if this is the first task in the workflow)'
- PolicyManager – Add/Edit Submission Production Task



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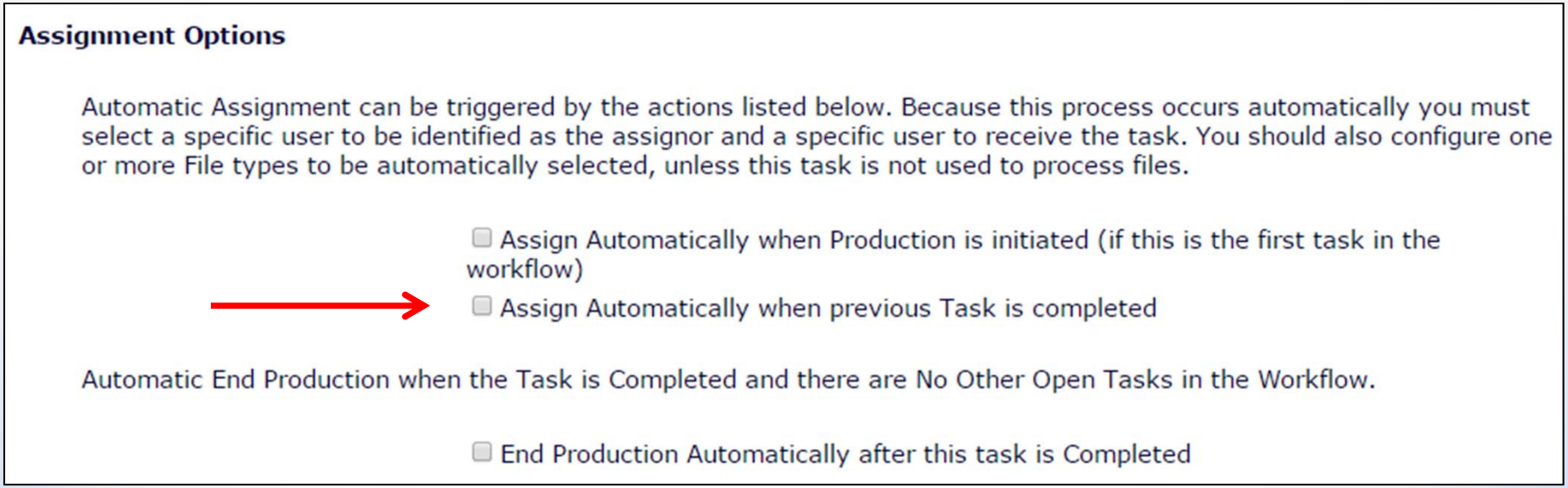
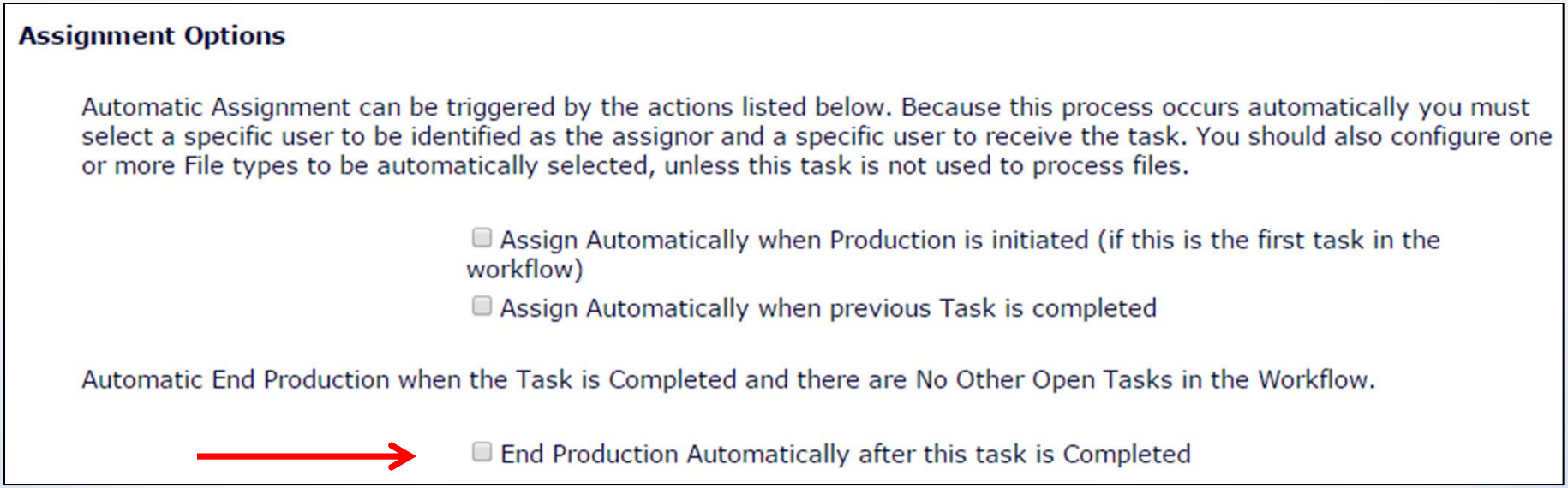
Automatically Assign Next Task in Workflow

- Select Submission Production task setting – 'Assign Automatically when previous task is completed' (PolicyManager – Add/Edit Submission Production Task)



End Production when Task is Submitted

- Select Submission Production task setting – 'End Production Automatically after this task is Completed'
  - If there are other open tasks in the workflow, production will ***not*** be ended.



Pre-Version 12.0 Task Workflows

- Configured via ***Define Submission Workflows*** page (PolicyManager)
- Associated with Article Types on ***Edit Article Type*** page (PolicyManager)
- Submission of task can trigger next task immediately after it in the workflow

‘Automatic Task Triggering’ Example

‘Basic Workflow’

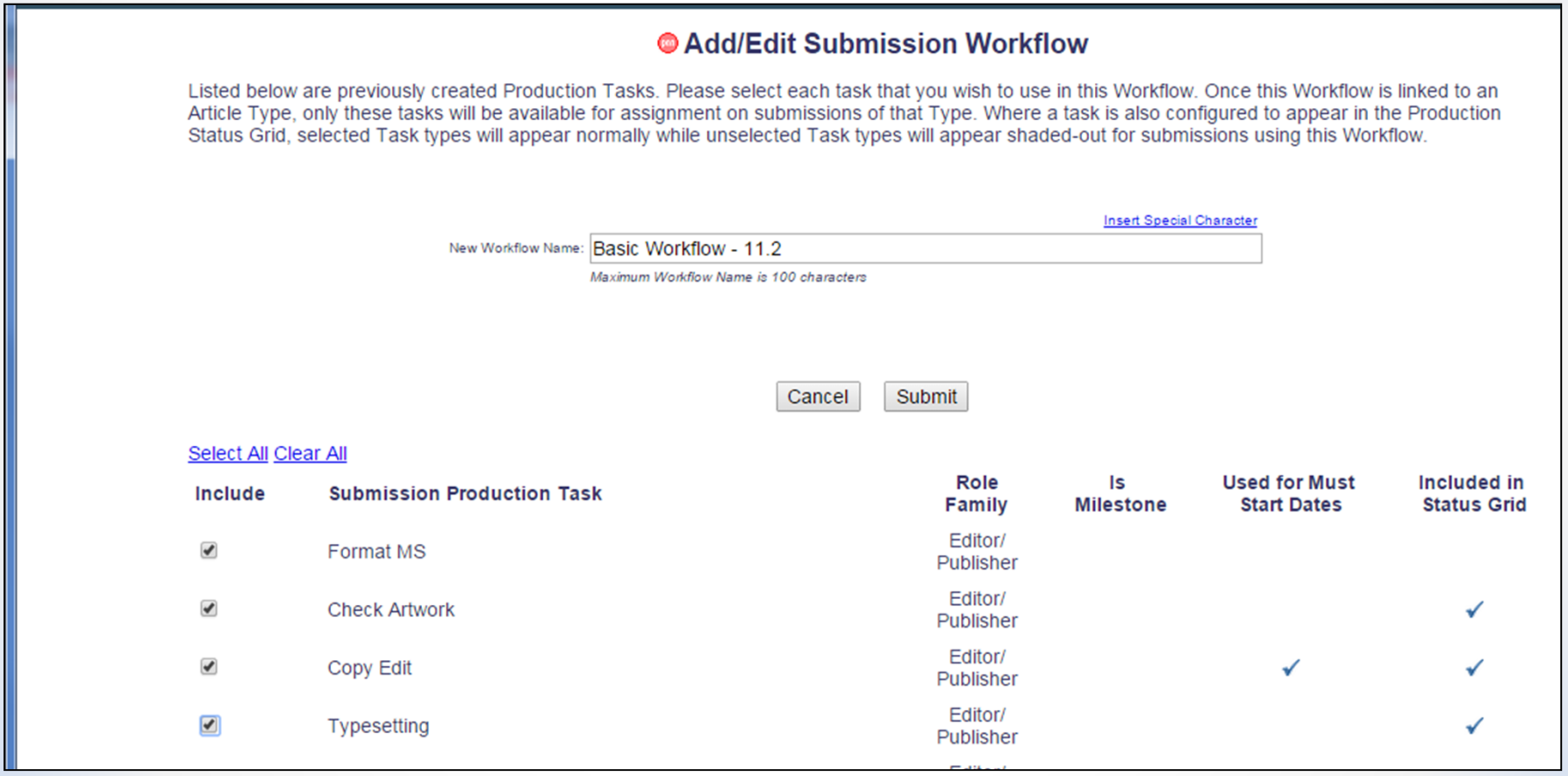
- Format MS
- Copy Edit
- Check Artwork
- Typesetting

‘Simple Workflow’

- Format MS
- Typesetting
- Printing

If ‘Typesetting’ is configured to be Assigned Automatically, then ‘Check Artwork’ will trigger it in ‘Basic Workflow’, while ‘Format MS’ will trigger it in a ‘Simple Workflow’

Task selection – Basic workflow – Pre-12.0



Add/Edit Submission Workflow

Listed below are previously created Production Tasks. Please select each task that you wish to use in this Workflow. Once this Workflow is linked to an Article Type, only these tasks will be available for assignment on submissions of that Type. Where a task is also configured to appear in the Production Status Grid, selected Task types will appear normally while unselected Task types will appear shaded-out for submissions using this Workflow.

Insert Special Character

New Workflow Name: Basic Workflow - 11.2

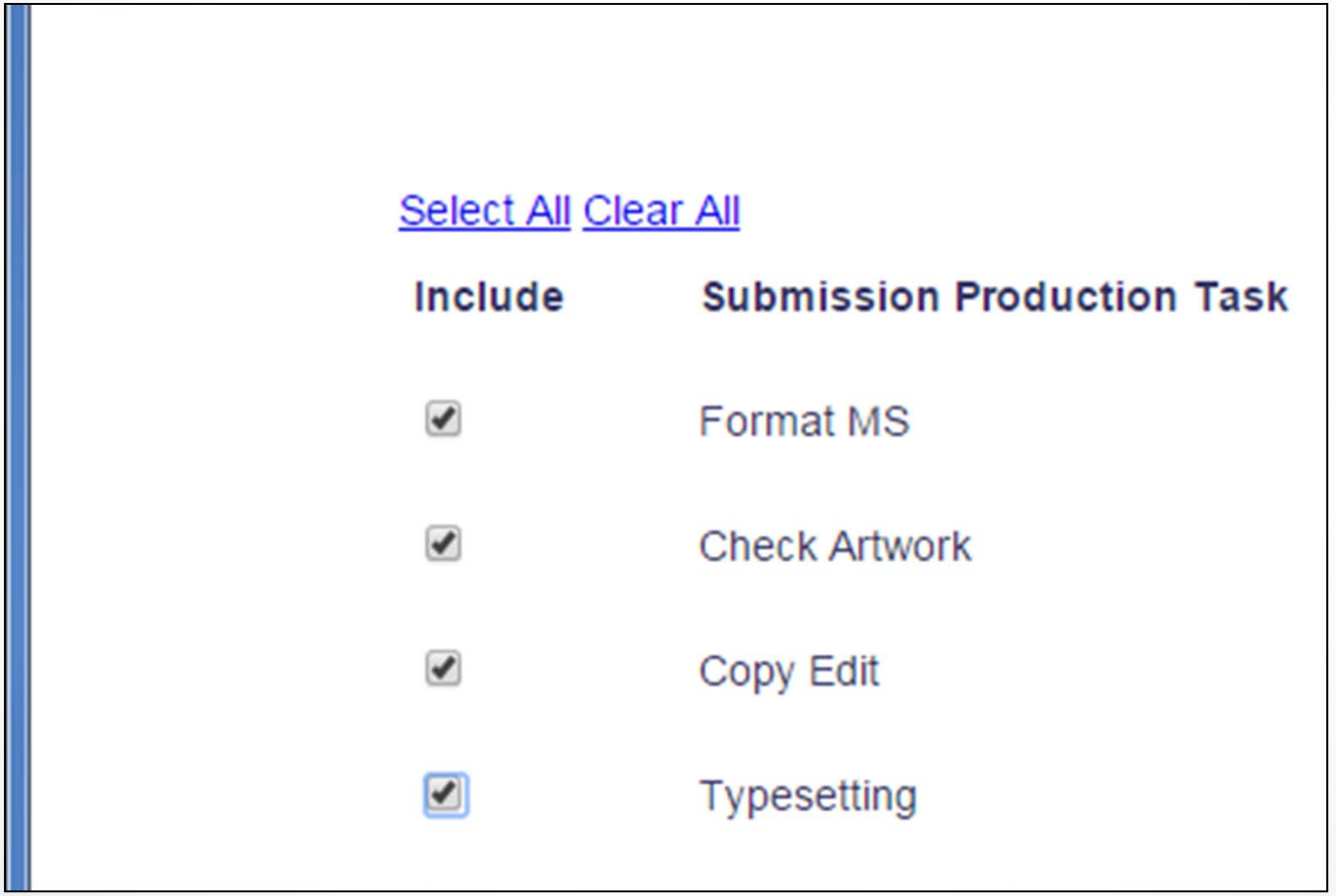
Maximum Workflow Name is 100 characters

Cancel Submit

Select All Clear All

Include	Submission Production Task	Role Family	Is Milestone	Used for Must Start Dates	Included in Status Grid
☑	Format MS	Editor/ Publisher			
☑	Check Artwork	Editor/ Publisher			✓
☑	Copy Edit	Editor/ Publisher		✓	✓
☑	Typesetting	Editor/ Publisher			✓

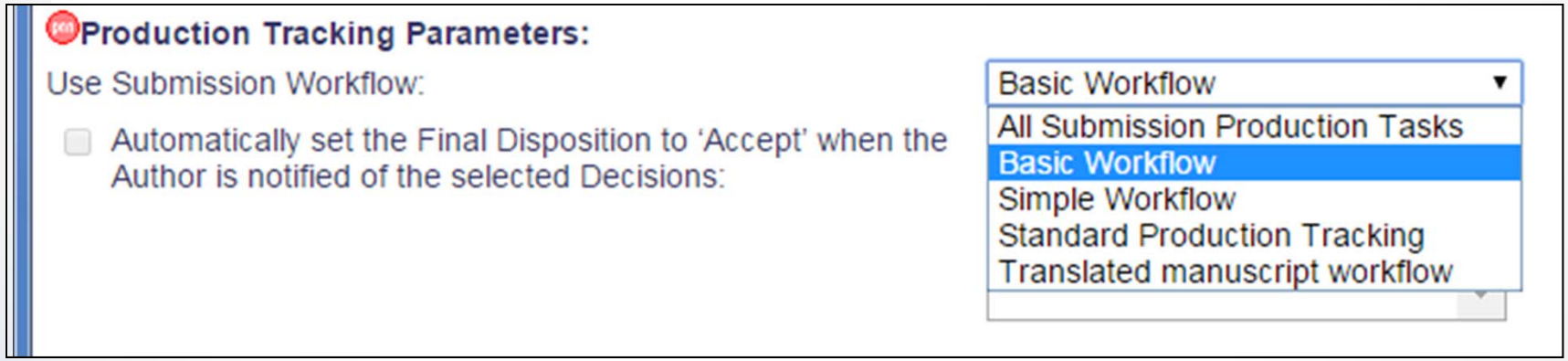
Task selection – Basic workflow



Task selection – Simple workflow

Assign Workflow to Article Type

Edit Article Type -PolicyManager



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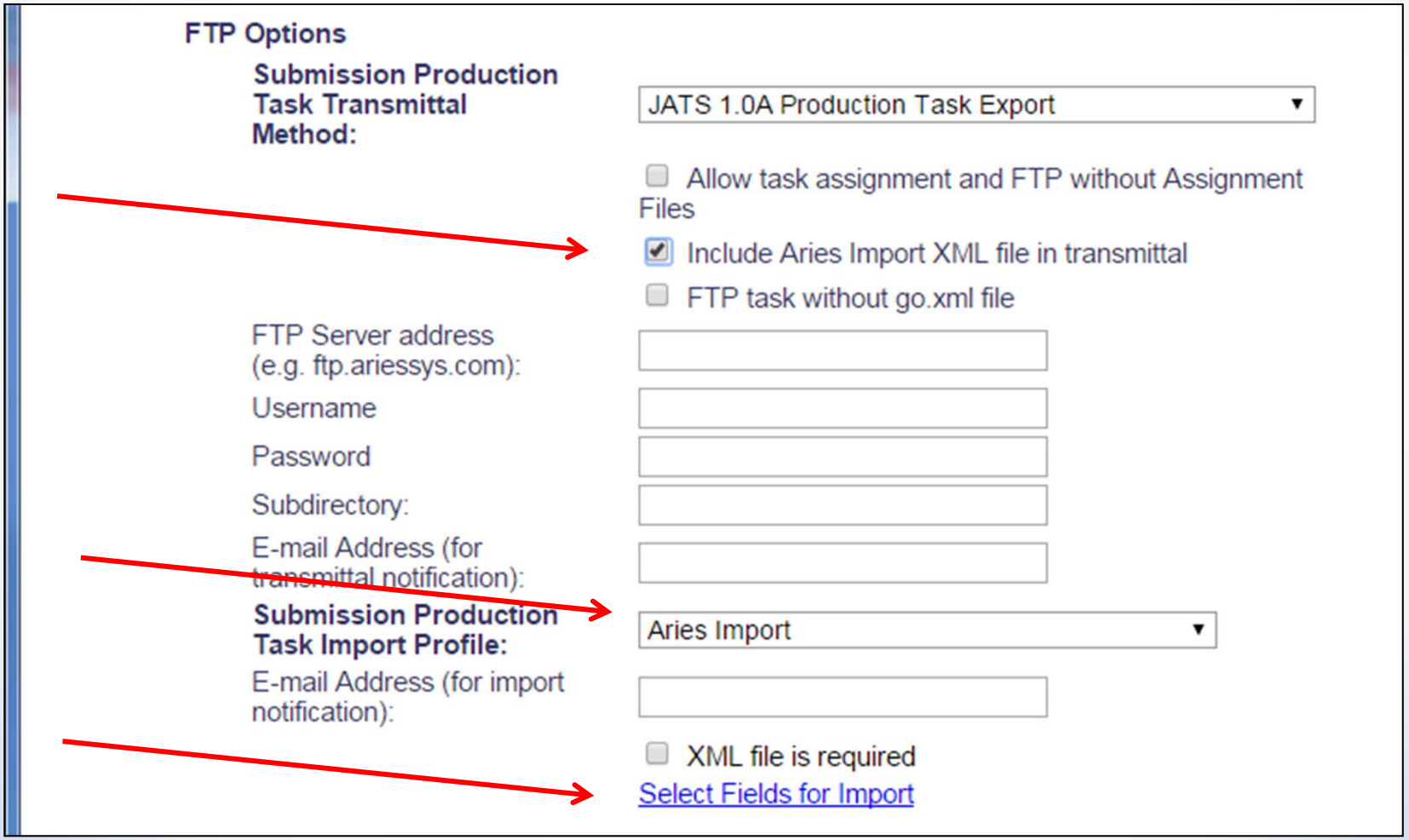
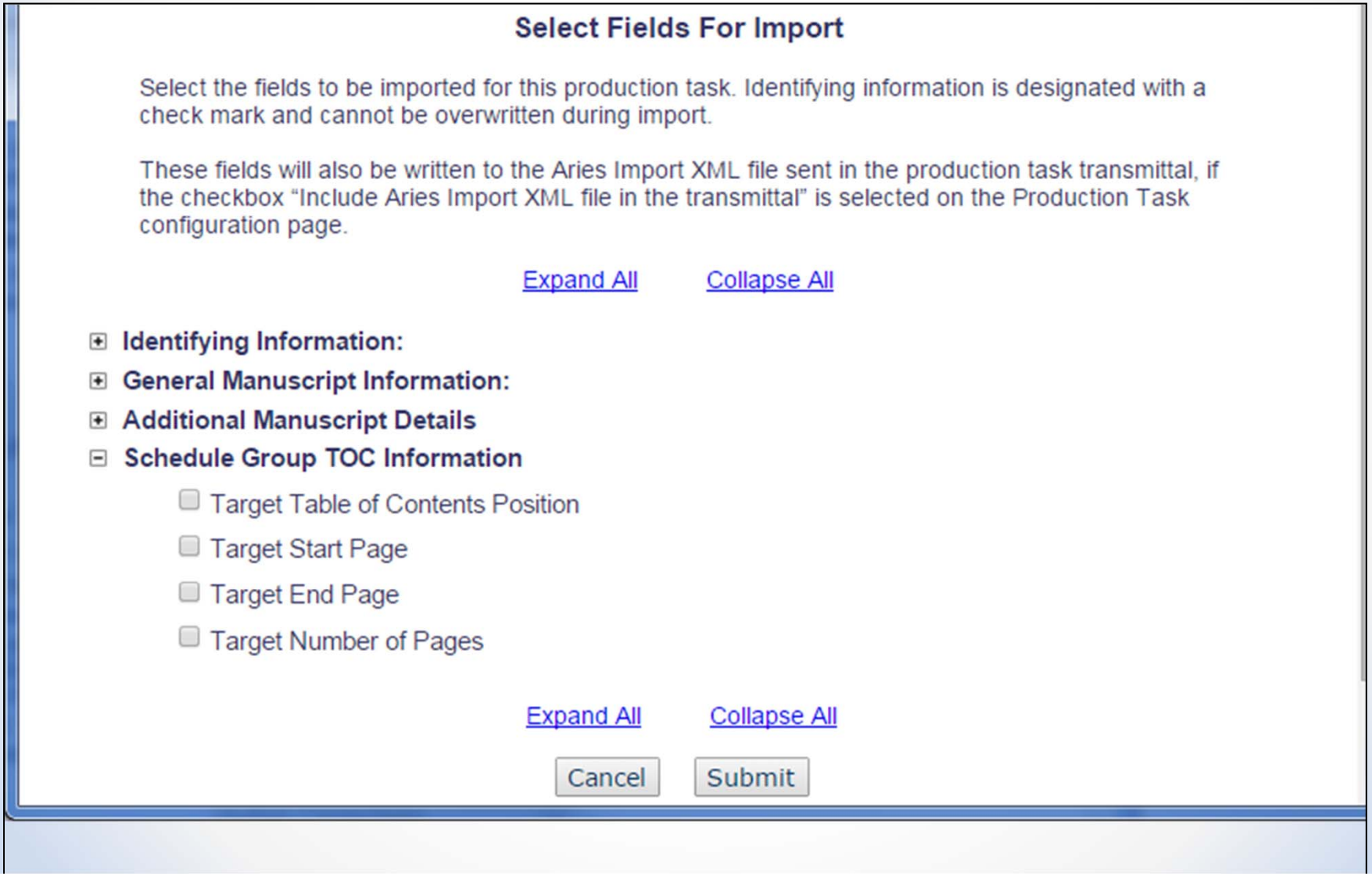
'Aries Import' available

PolicyManager – Add/Edit Submission Production Task



Select Fields for Import



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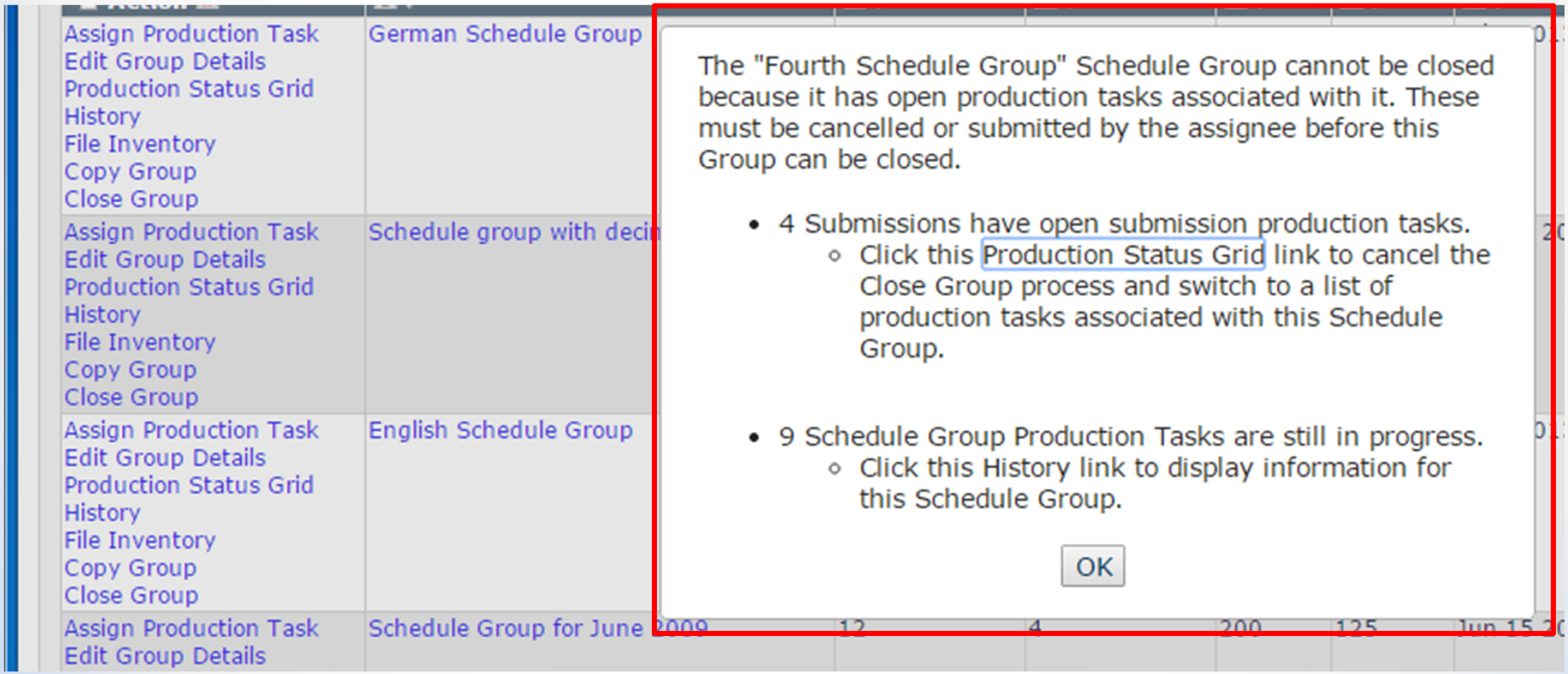
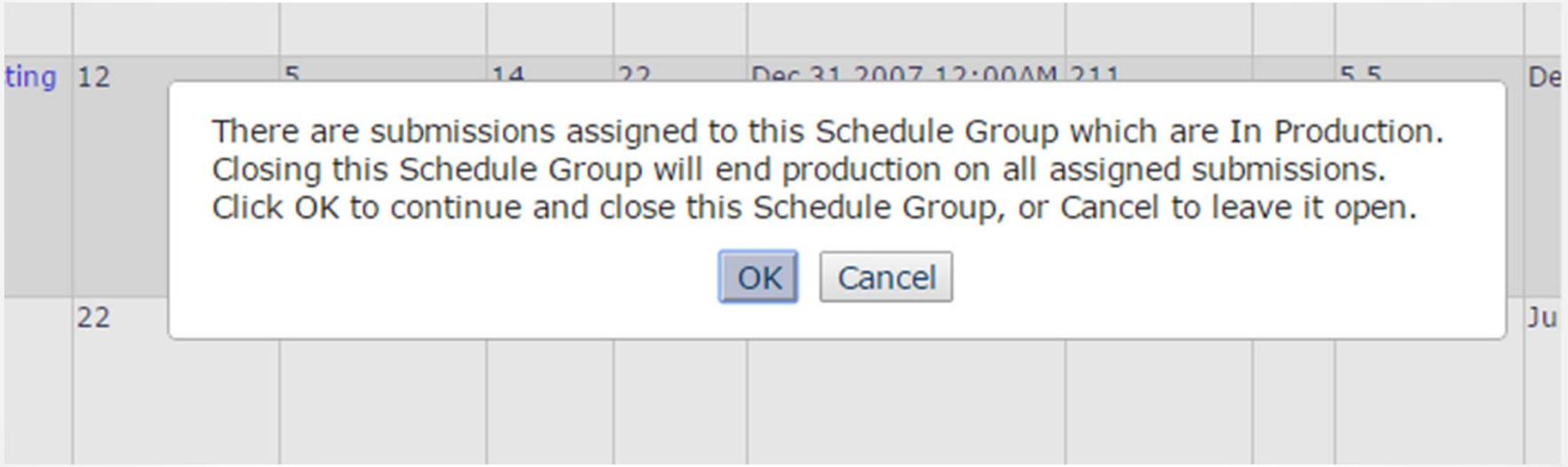
Close Schedule Group

- Cannot close group if there are open SG Tasks or Submission Production tasks

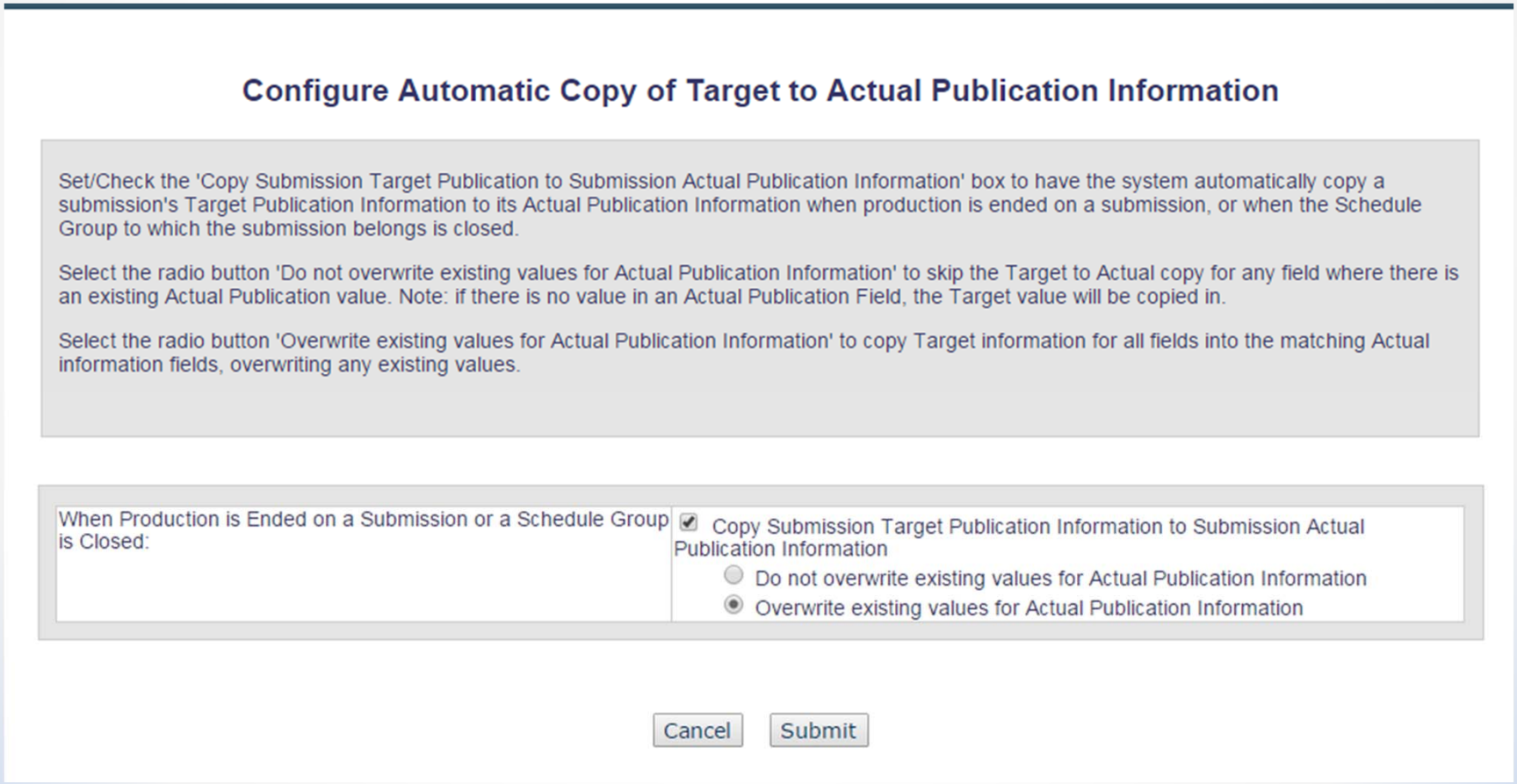


Close Schedule Group

- ***Can*** close group if no open tasks, will automatically end production on all submissions in group



Ending Production can copy Target Publication values to Actual Values



Version 12.0 Enhancements

Version 12.0 Enhancements

- Enhanced Submission Production Task Workflow options
- Automated reminders for Production Tasks
- Automatic cancellation of Production Tasks when Closing Schedule Group
- JATS Manuscript Import – ProduXion Manager
- Imports initiating production can now trigger the first task in the workflow
  - Specific Import methods

Enhanced Submission Production Task Workflow Options

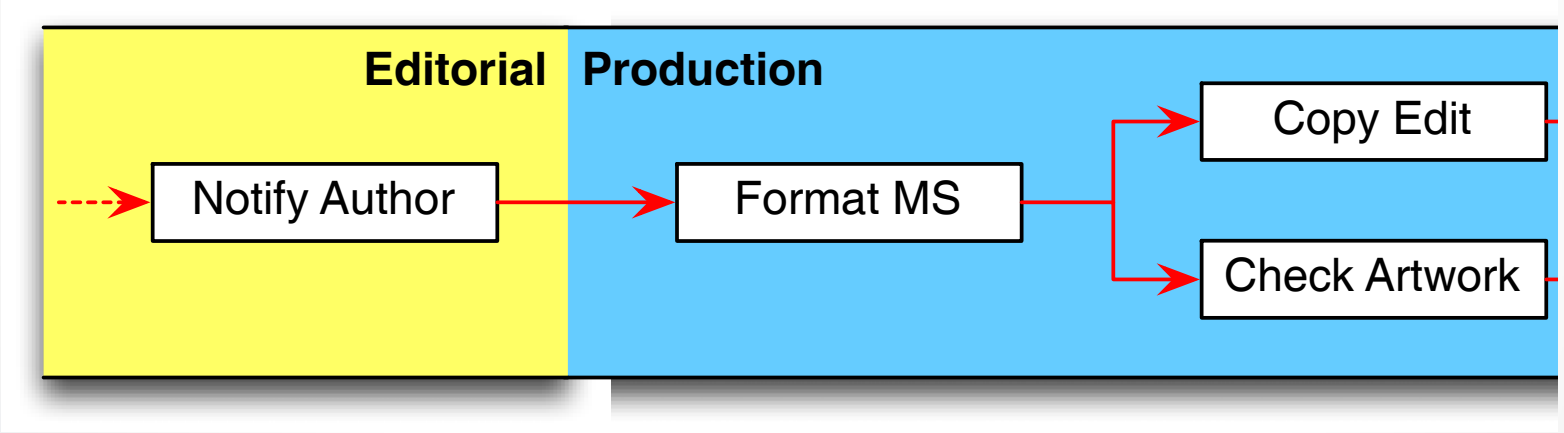
• • •

Enhanced Submission Production Task Workflow Options

- Pre-version 12.0, automatic task assignment supports linear workflow only (Format Manuscript -> Copy Edit -> Check Artwork ->Typesetting)
  - If Copy Edit and Check Artwork need to happen simultaneously, Copy Edit can be assigned automatically, then Check Artwork needs to be assigned manually.

12.0 Workflow

- Production starts with an in-house Format MS (triage/cleanup) task
- In 12.0, after Format MS is completed, manuscript can go to Copy Edit and Check Artwork ***at the same time***

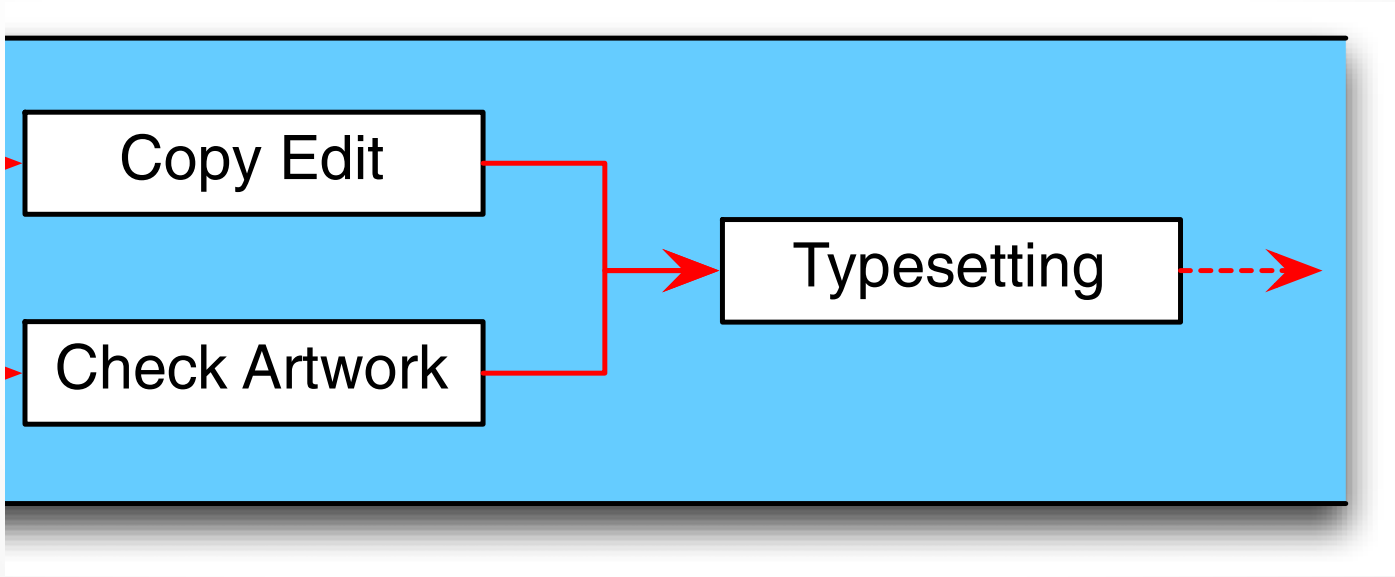


Enhanced Production Task Workflow Options

- Pre-version 12.0, if Typesetting must wait for both Copy Edit and Check Artwork, then Typesetting must be assigned manually.
  - No way for system to automatically hold off assigning Typesetting until both Copy Edit and Check Artwork are completed (if they take place simultaneously).

12.0 Workflow

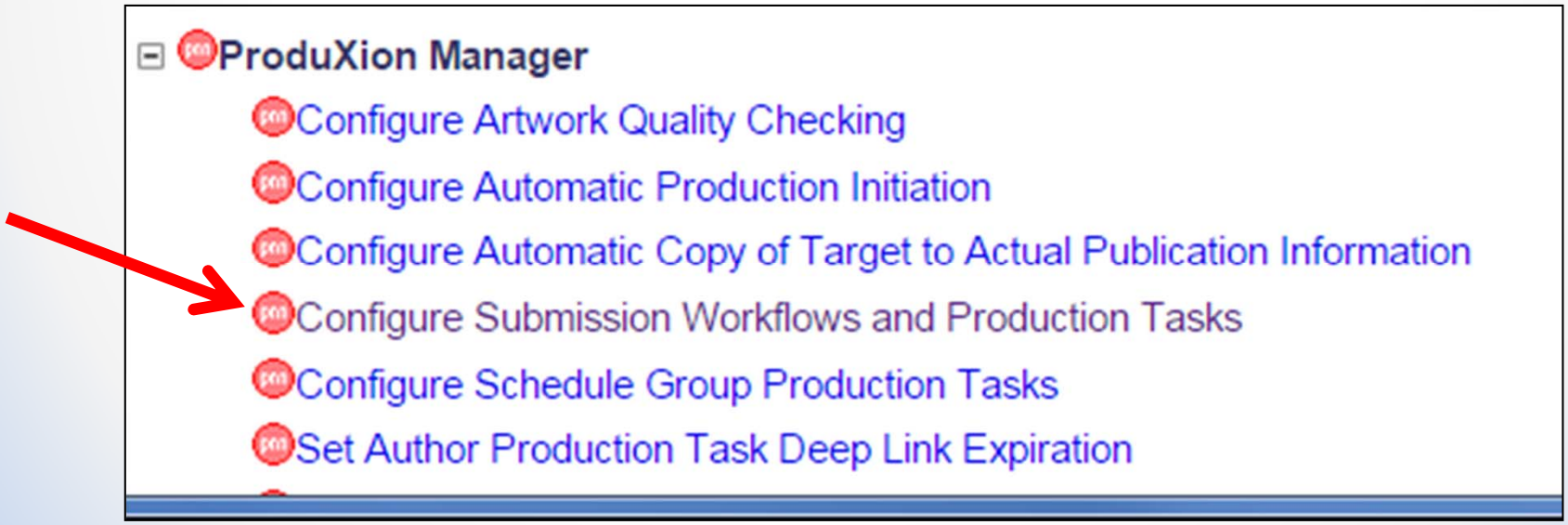
- Typesetting starts automatically, but only when ***both*** Copy Edit AND Check Artwork are complete.



Workflow Creation – 12.0

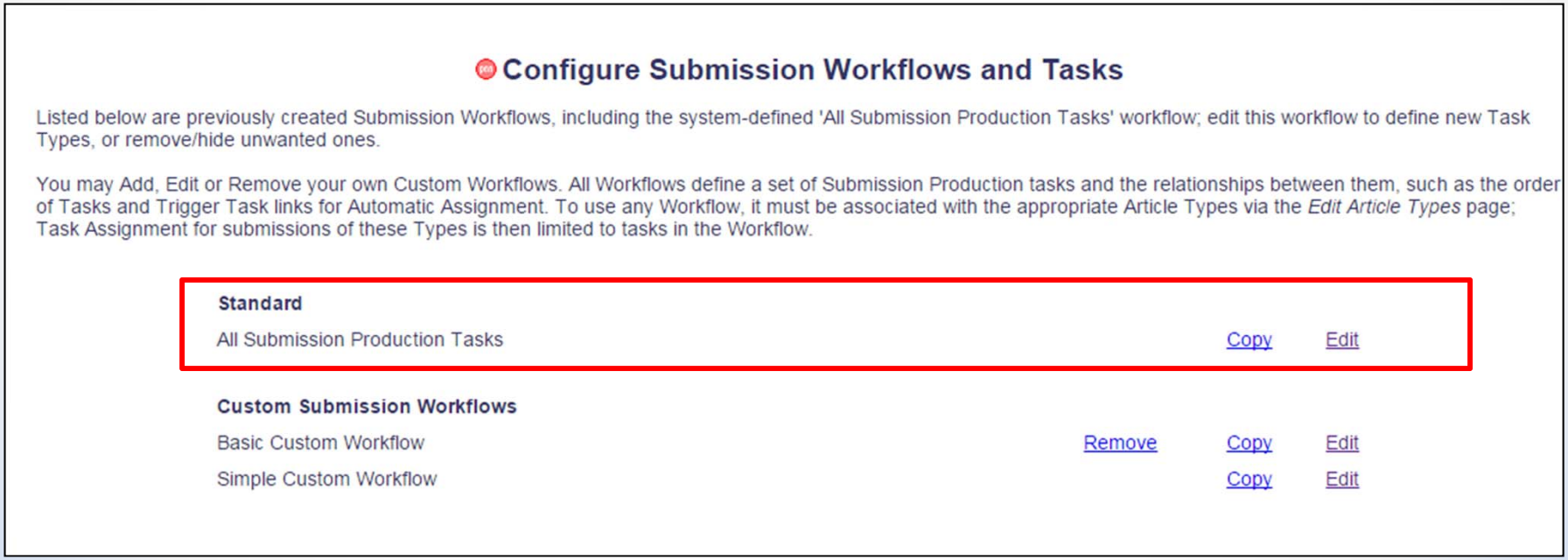
PolicyManager Main Menu:

- 'Configure Submission Production Tasks' link enhanced – now 'Configure Submission Workflows and Production Tasks'
- 'Define Submission Workflows' no longer a separate link



Configure Submission Workflows and Production Tasks

- 'All Submission Production Tasks' is Standard default workflow on the new page
- ***New*:** Ability to create more complicated production task workflows (for both standard and custom workflows)

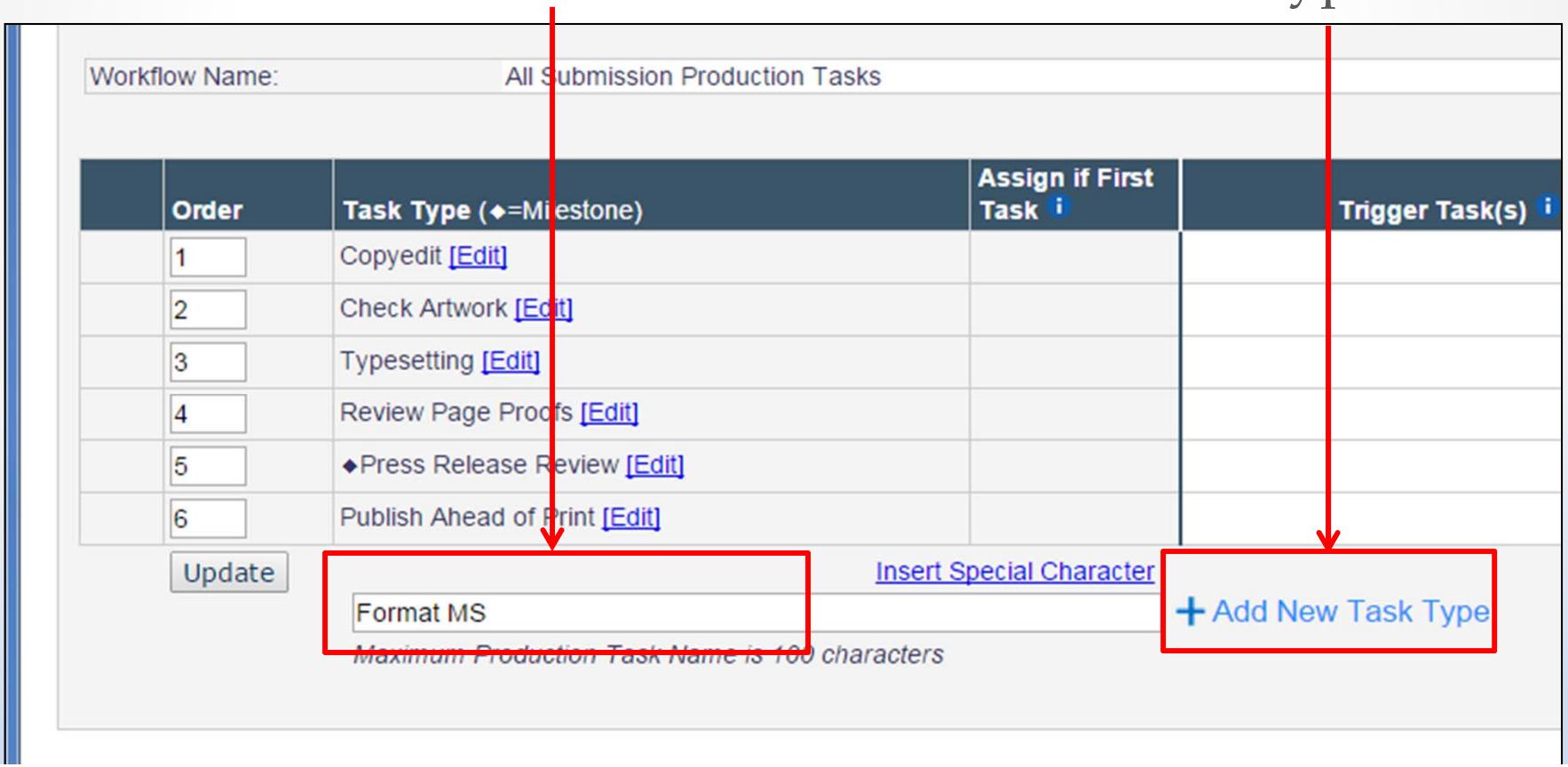


Custom Automated Workflow Creation

- First create (or edit) Submission Production Tasks to make them automated tasks (if full automation desired)
- Automated Task Assignment - PM has to know:
  - If task is first in workflow, is it automatically assigned?
  - If task is ***not*** first in workflow, which task completion(s) trigger its assignment?
  - Who (individual) is ***Assigning*** the task
  - Who (individual) is ***Receiving*** the task
  - What files need to be automatically assigned?
- Automated Task Submission by FTP - PM has to know:
  - When files are submitted by FTP, with which Submission Item Type should they be automatically associated?
  - Should any metadata be overwritten?

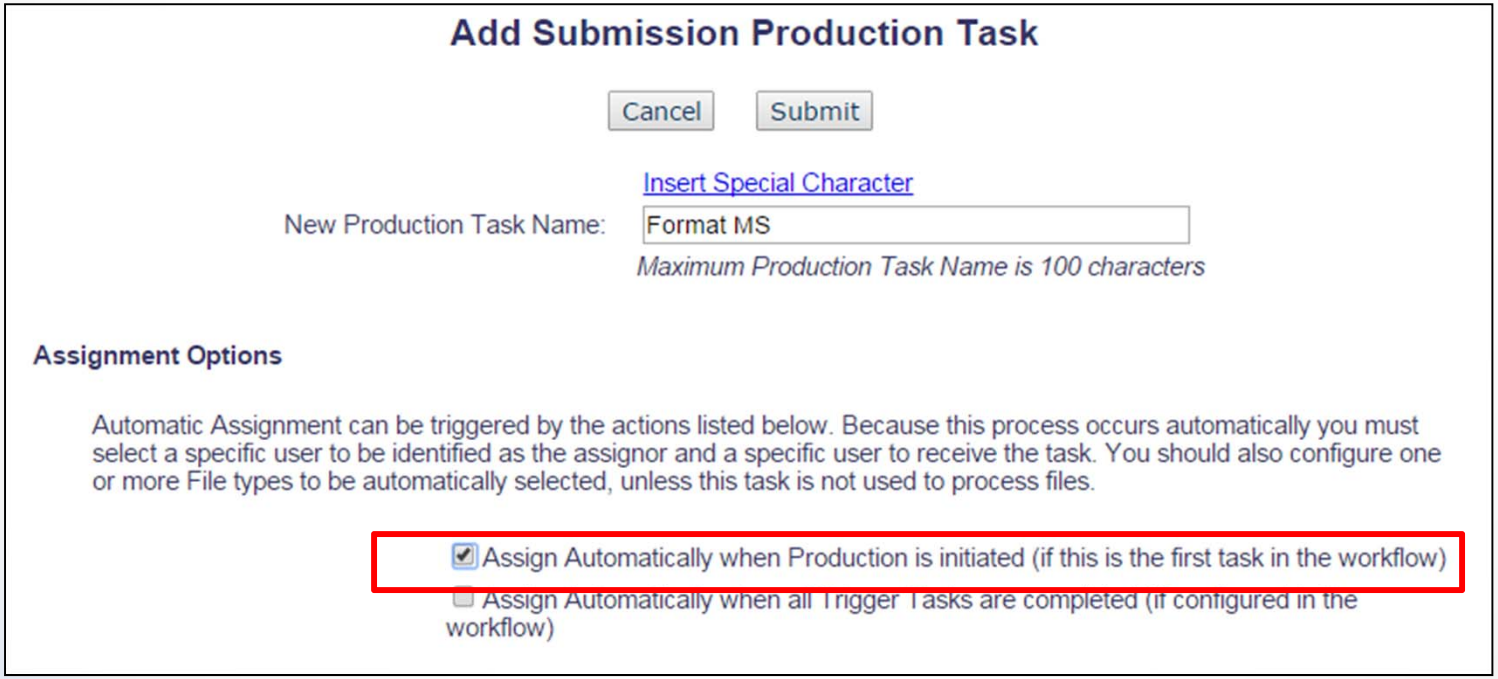
Adding New Task
Format MS

- "Add New Task" functionality relocated in 12.0
- Edit the 'All Submission Production Tasks' Workflow.
- Enter a Task Name and click ''+Add New Task Type'



Adding New Task
Format MS

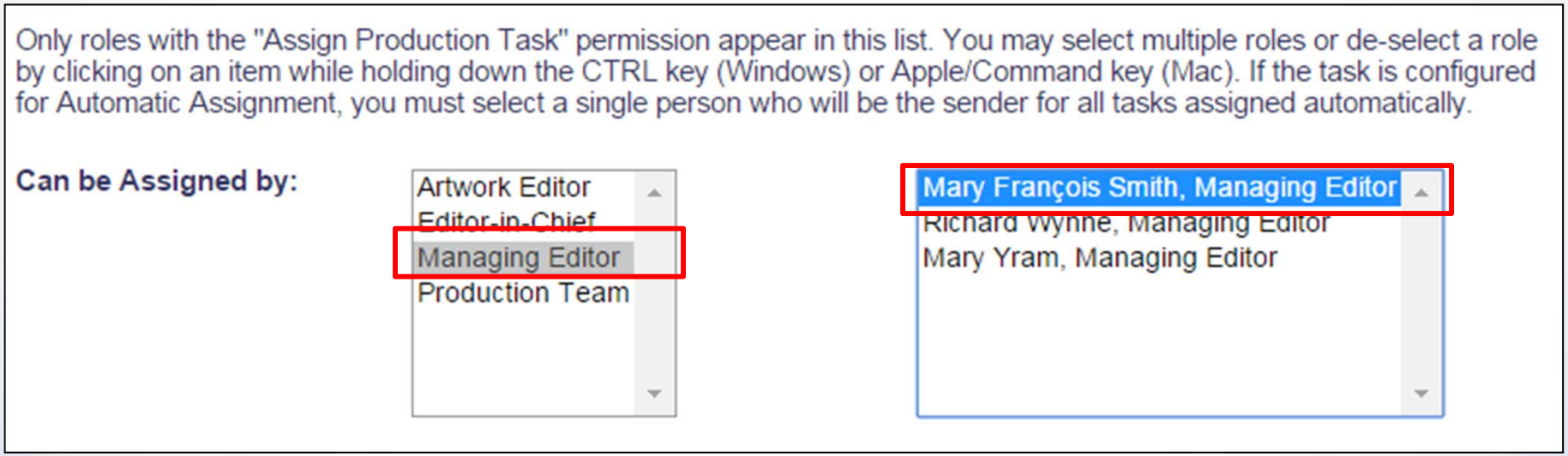
- Select 'Assign Automatically when Production is initiated (if this is the first task in the workflow)'



Adding New Task

Format MS

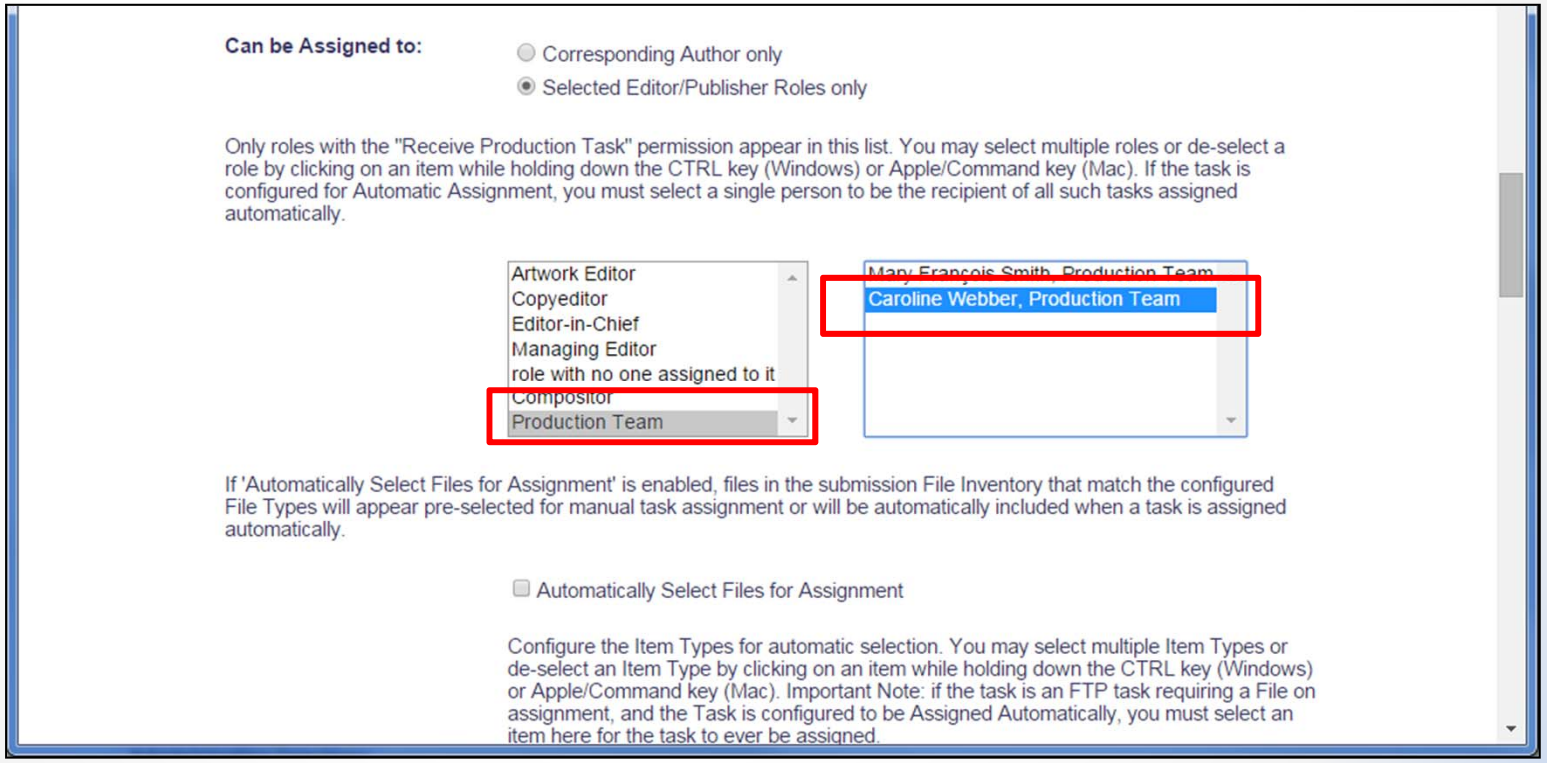
- Select one or more Roles and an Individual PERSON to be associated with the automatically assigned task as the ***task assignor***



Adding New Task

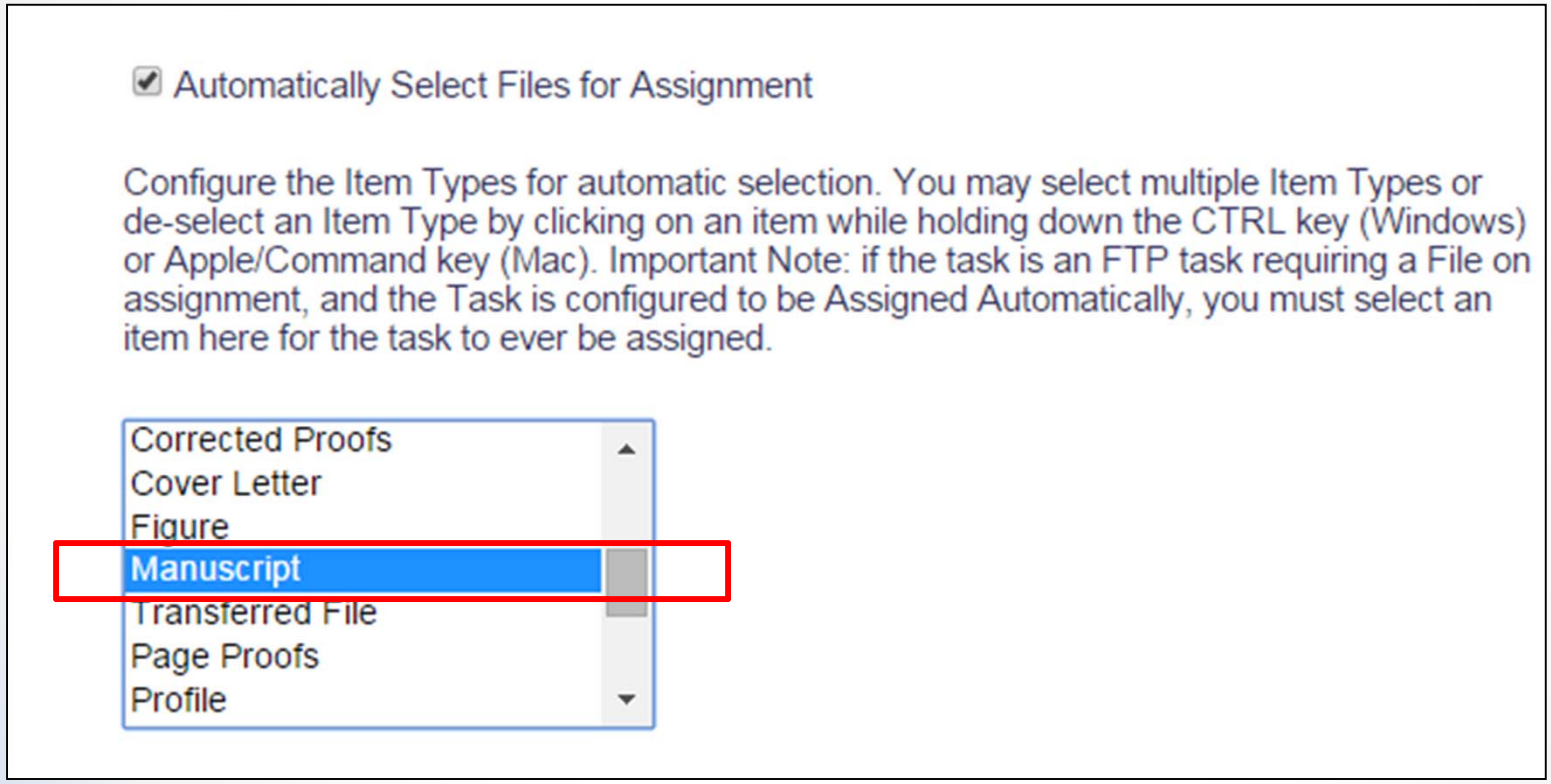
Format MS

- Select a Role and individual PERSON to be the automatically assigned ***task recipient***
- (If FTP'ed, still need to select a task recipient.)



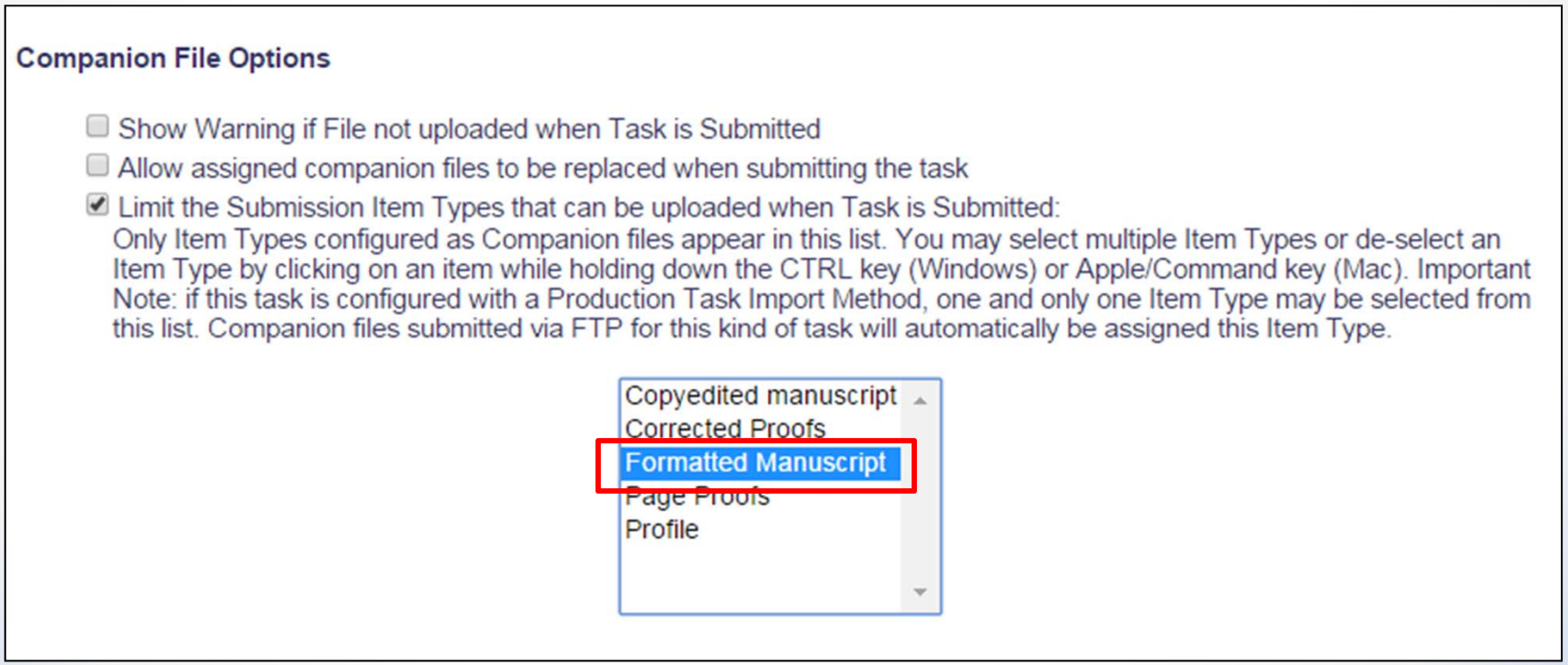
Adding New Task Format MS

- Select Item Types to be assigned automatically



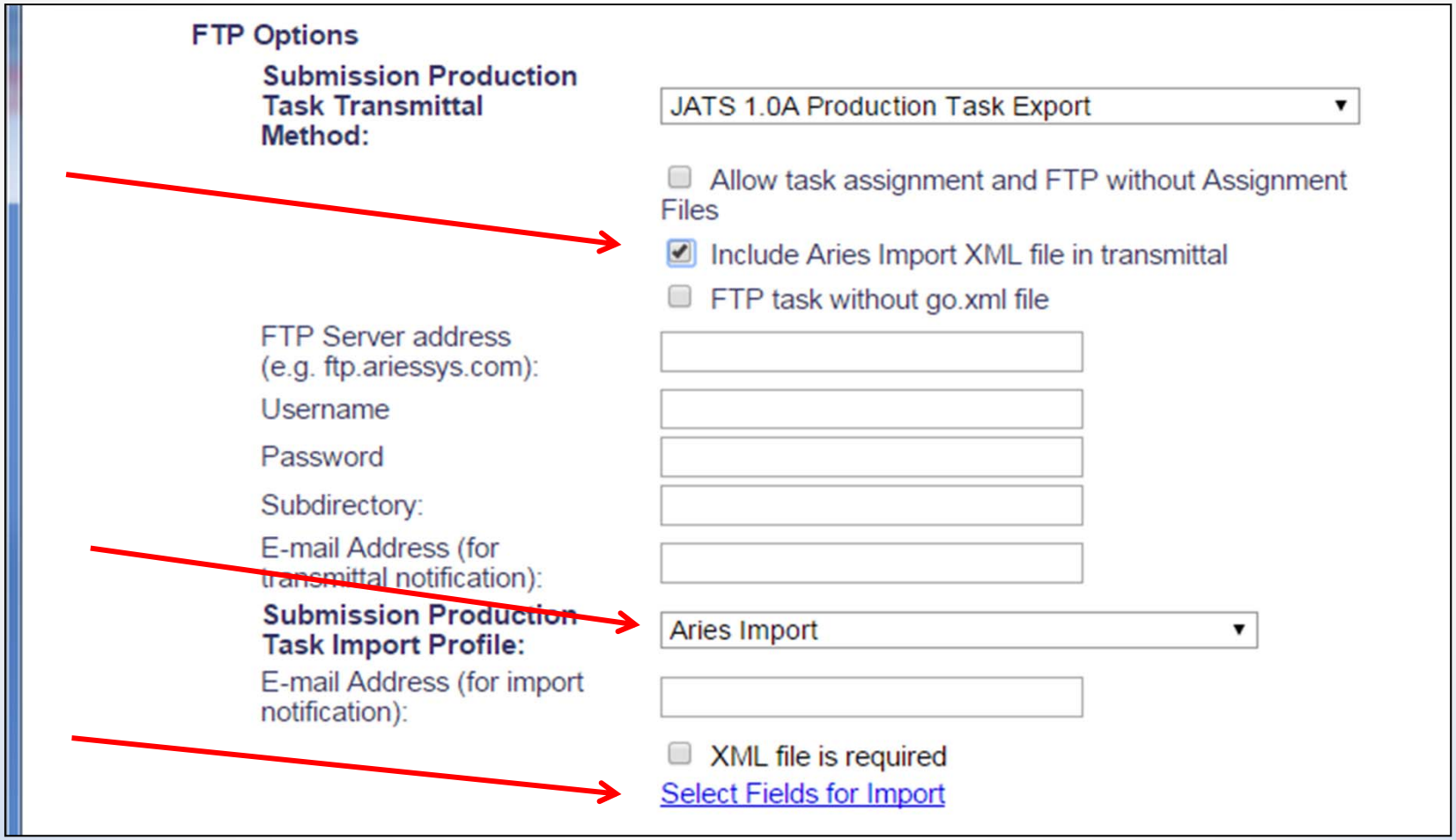
Adding New Task Format MS

- If task is to be submitted via FTP, select Item Type to be automatically associated with ftp'ed-in files



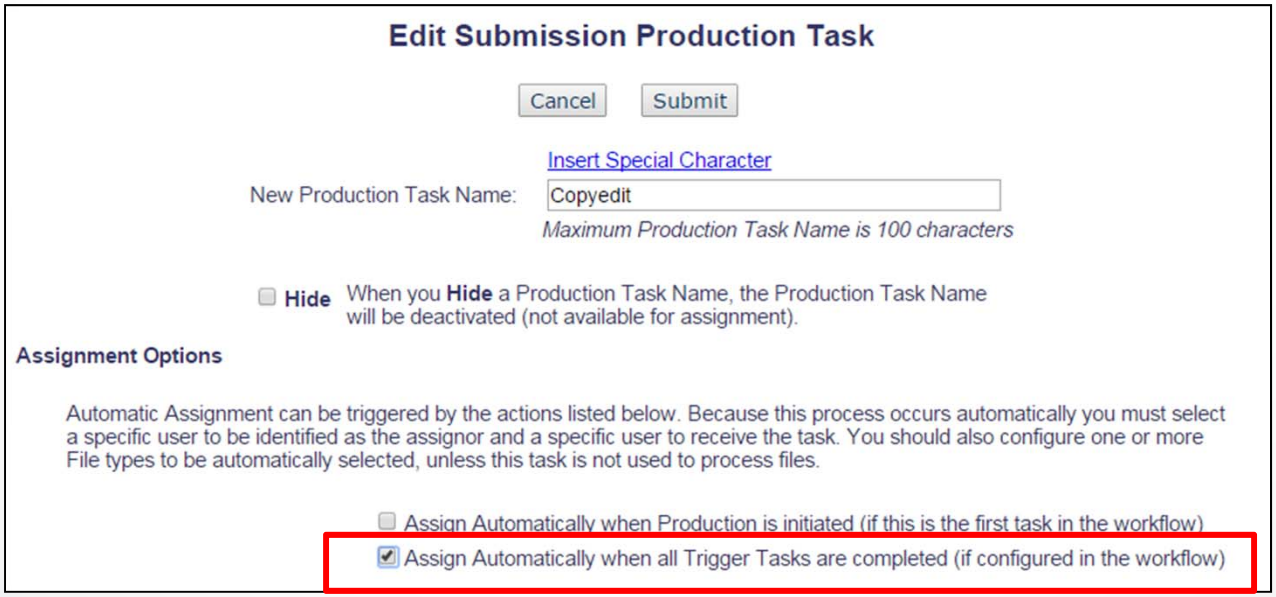
Adding New Task Format MS

- For task submitted via FTP, decide if metadata will be overwritten



Configure other tasks in workflow to be assigned automatically

- For the Copy Edit, Check Artwork, and Typesetting tasks, the setting 'Assign Automatically when previous task is completed' is renamed to 'Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)' in 12.0.
- This setting ***must*** be selected for automated assignment. If already selected in 11.2, no configuration change needed

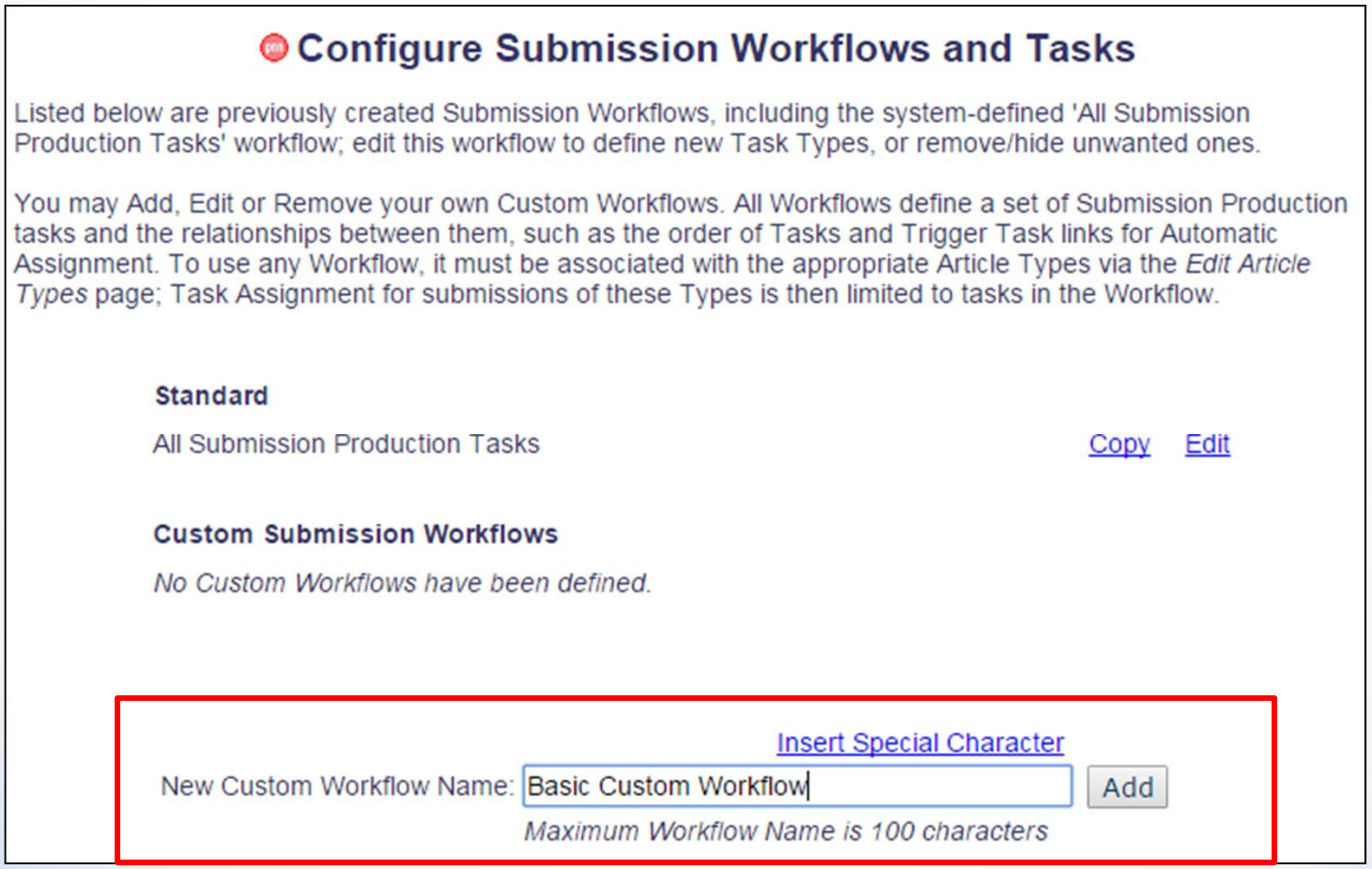


Configure other tasks in workflow to be assigned automatically

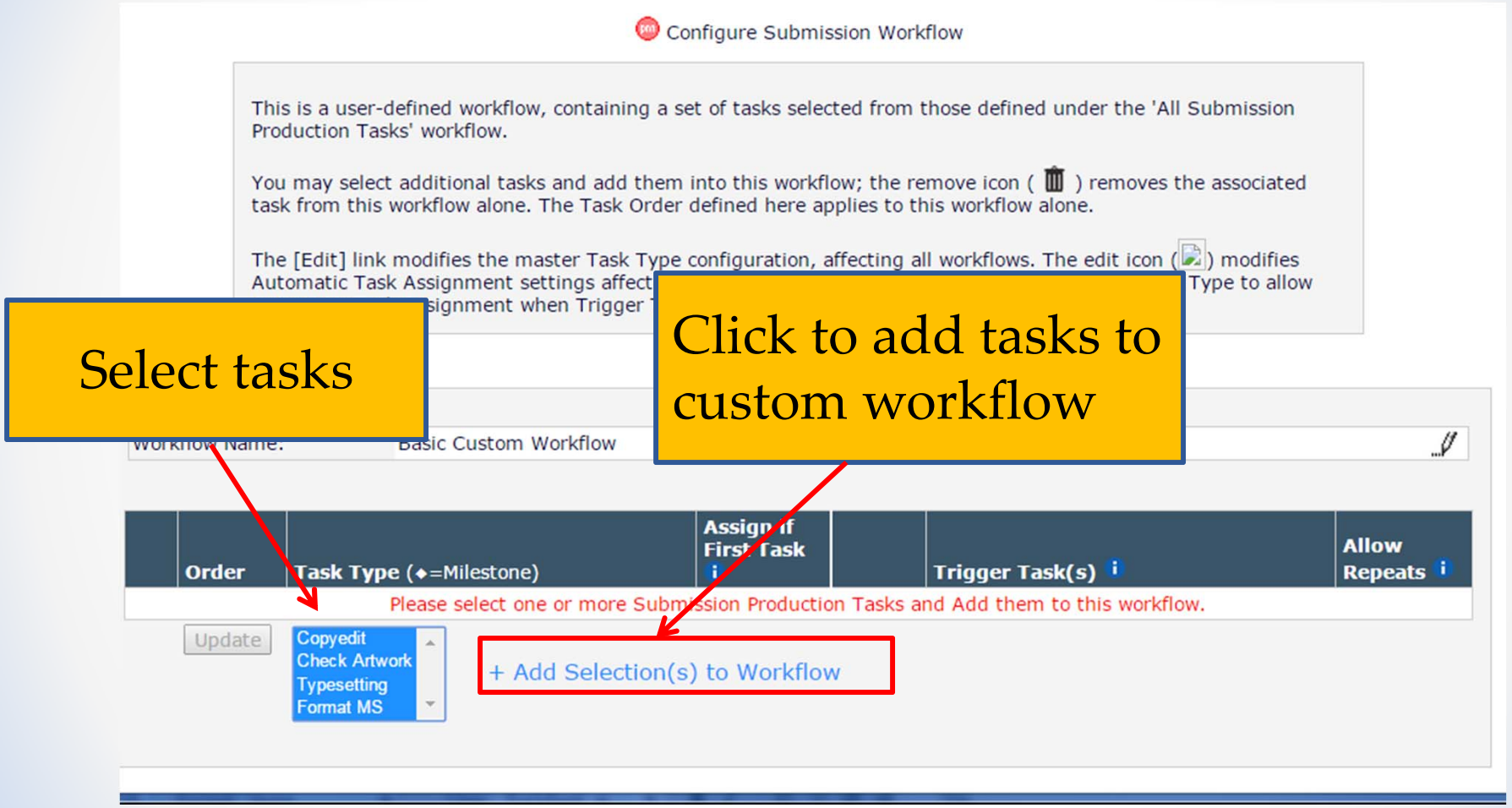
- **BUT WAIT!!!!** – you promised to support more customized production task workflows! Where do we configure them?
- AND, what happened to this configuration option?
  - If task is ***not*** first in workflow, which task completion(s) trigger its assignment?
- AND, the trigger task(s) for Typesetting are different in the 2 different workflows! (Basic vs. Simple)
- ***Hint***: (We haven't yet told the system which tasks are the "trigger tasks" for Copy Edit, Check Artwork, and Typesetting)

Adding New Custom Workflow

- Enter custom workflow name and click ‘Add’ to start building a new custom workflow

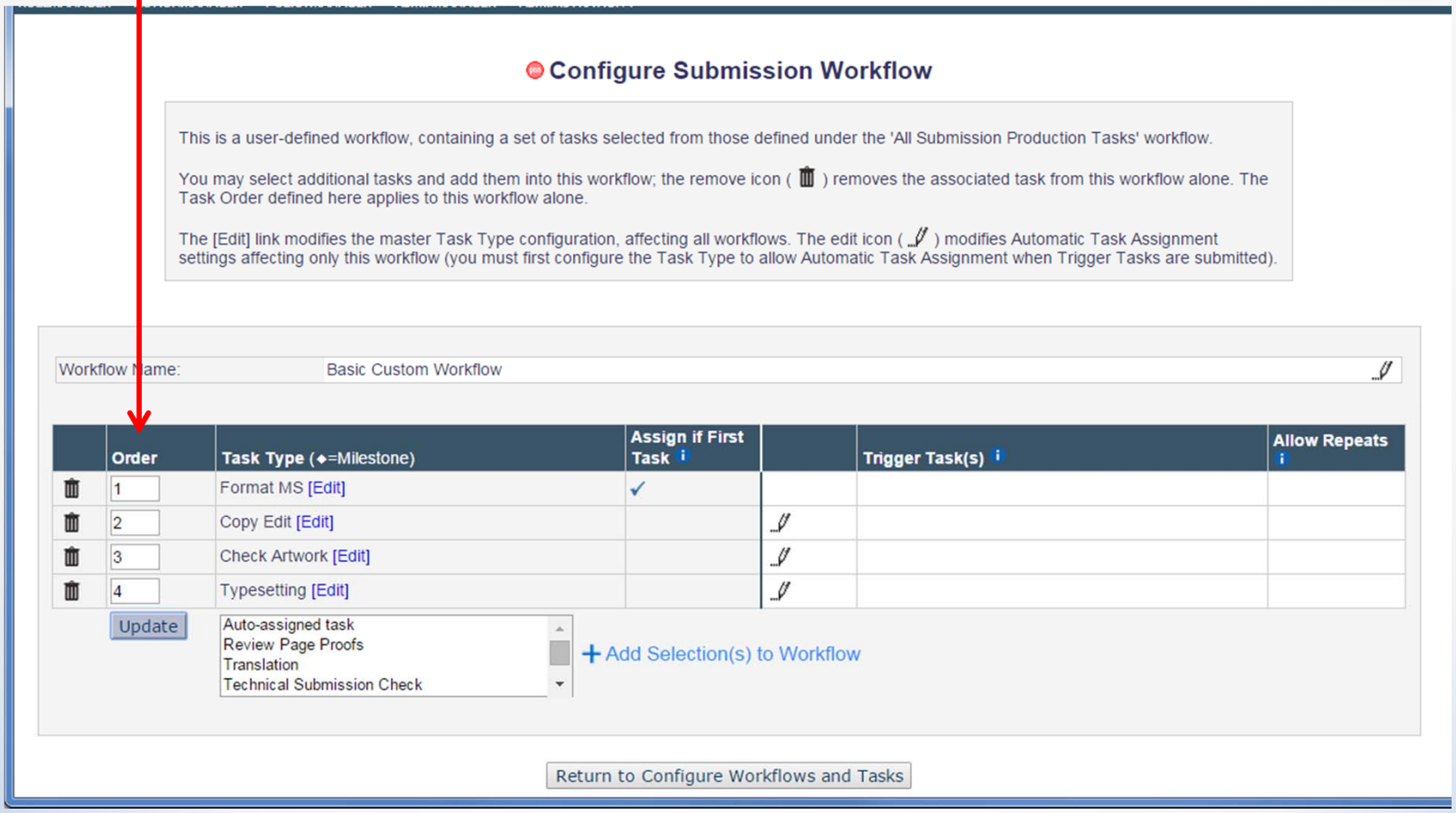


Adding new Custom Workflow



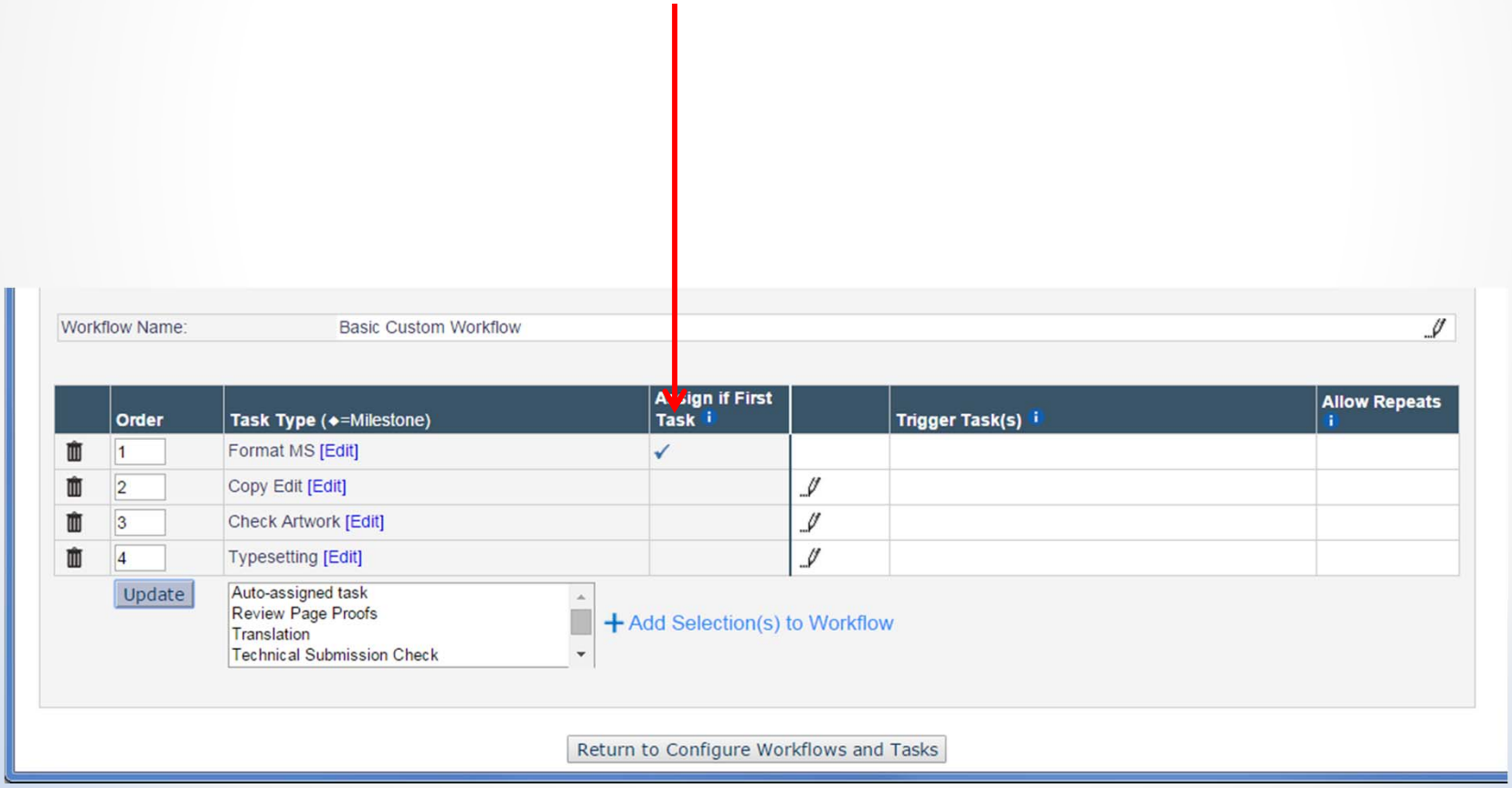
Set task order for this workflow

- Order is custom for this workflow; can be a different order for a different workflow!



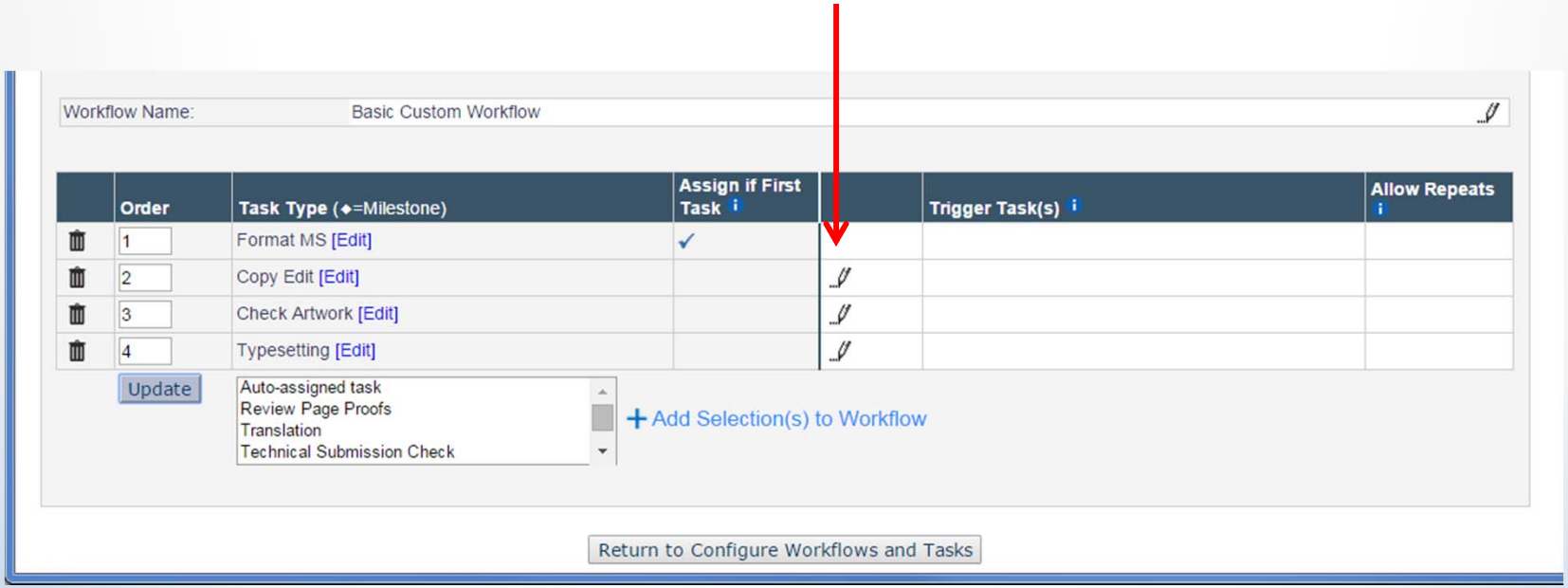
Things to Confirm

- Format MS has ‘Assign if First Task’ selected (i.e. will be automatically assigned at ‘Initiate Production’ for this workflow)



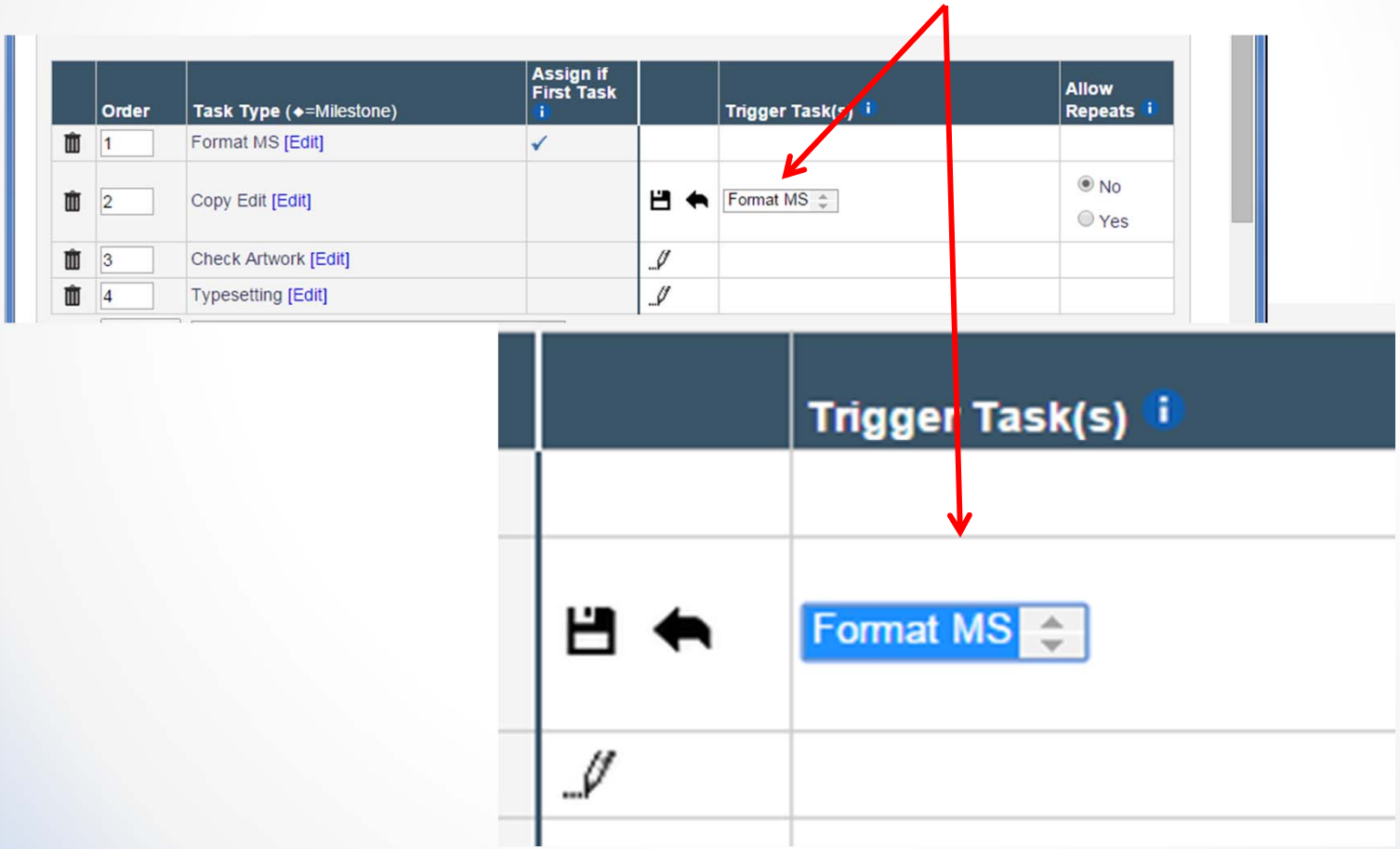
Things to Confirm

- Copy Edit, Check Artwork and Typesetting all have ‘pencil’ icons available in the ‘Trigger Task(s)’ section
  - Clicking the pencil allows you to select trigger tasks for each



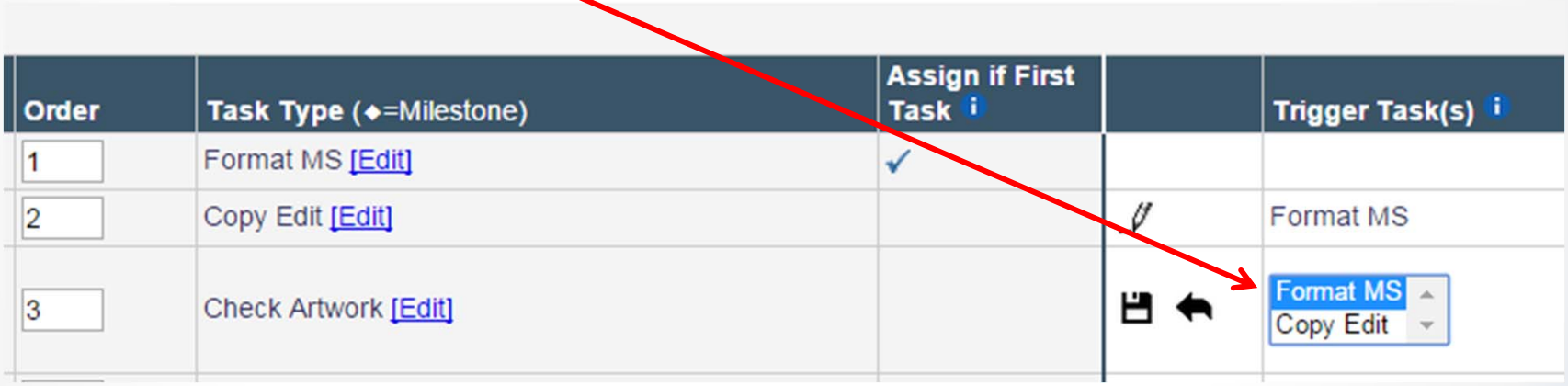
Set up trigger relationships for ‘Copy Edit’

- Click pencil icon for ‘Copy Edit’
- Select ‘Format MS’ and click the ‘Save’ icon



Set up trigger relationships

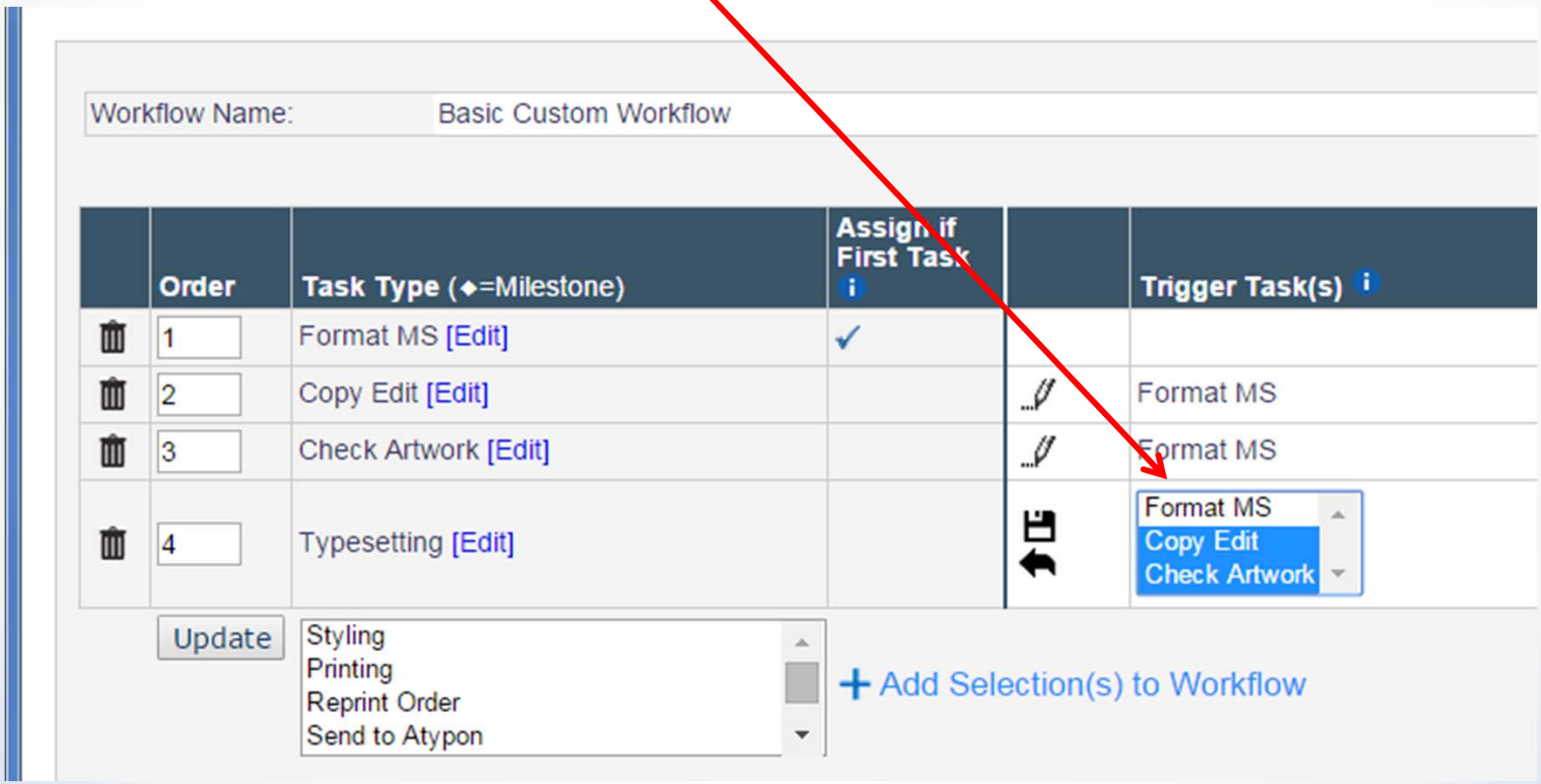
- When configuring Check Artwork, 2 choices – Format MS and Copy Edit (both preceding tasks in workflow); we pick 'Format MS'



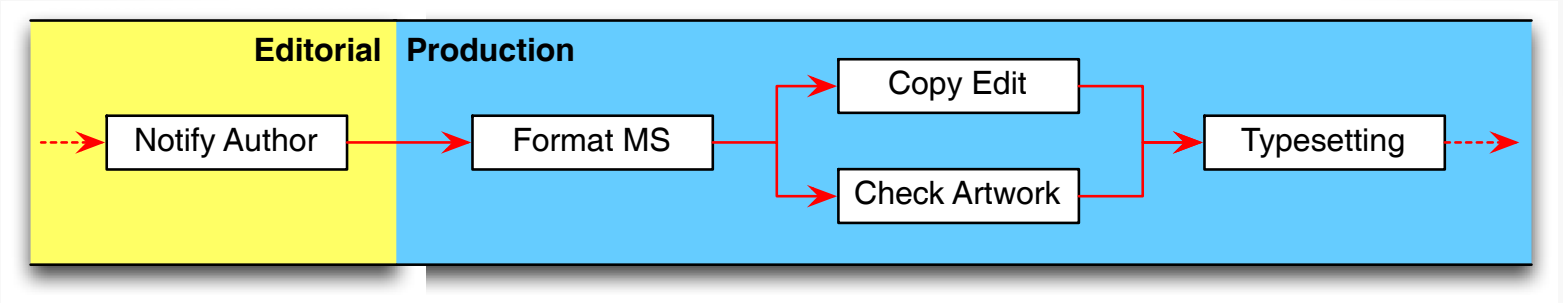
Order	Task Type (◆=Milestone)	Assign if First Task		Trigger Task(s)
1	Format MS [Edit]	✓		
2	Copy Edit [Edit]			Format MS
3	Check Artwork [Edit]			Format MS Copy Edit

Set up trigger relationships

- Typesetting – need to pick TWO trigger tasks, Copy Edit and Check Artwork

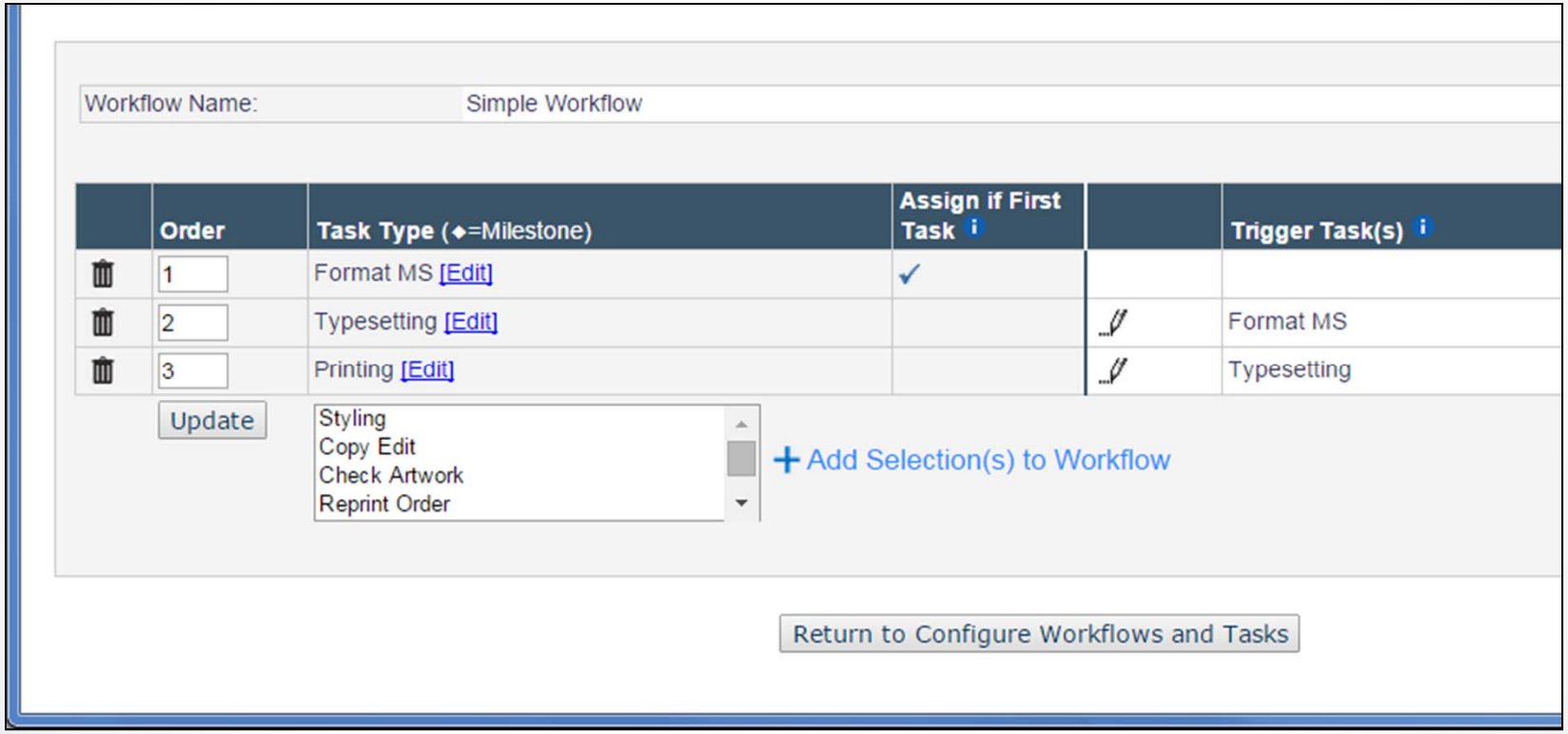


Basic Custom Workflow, configured



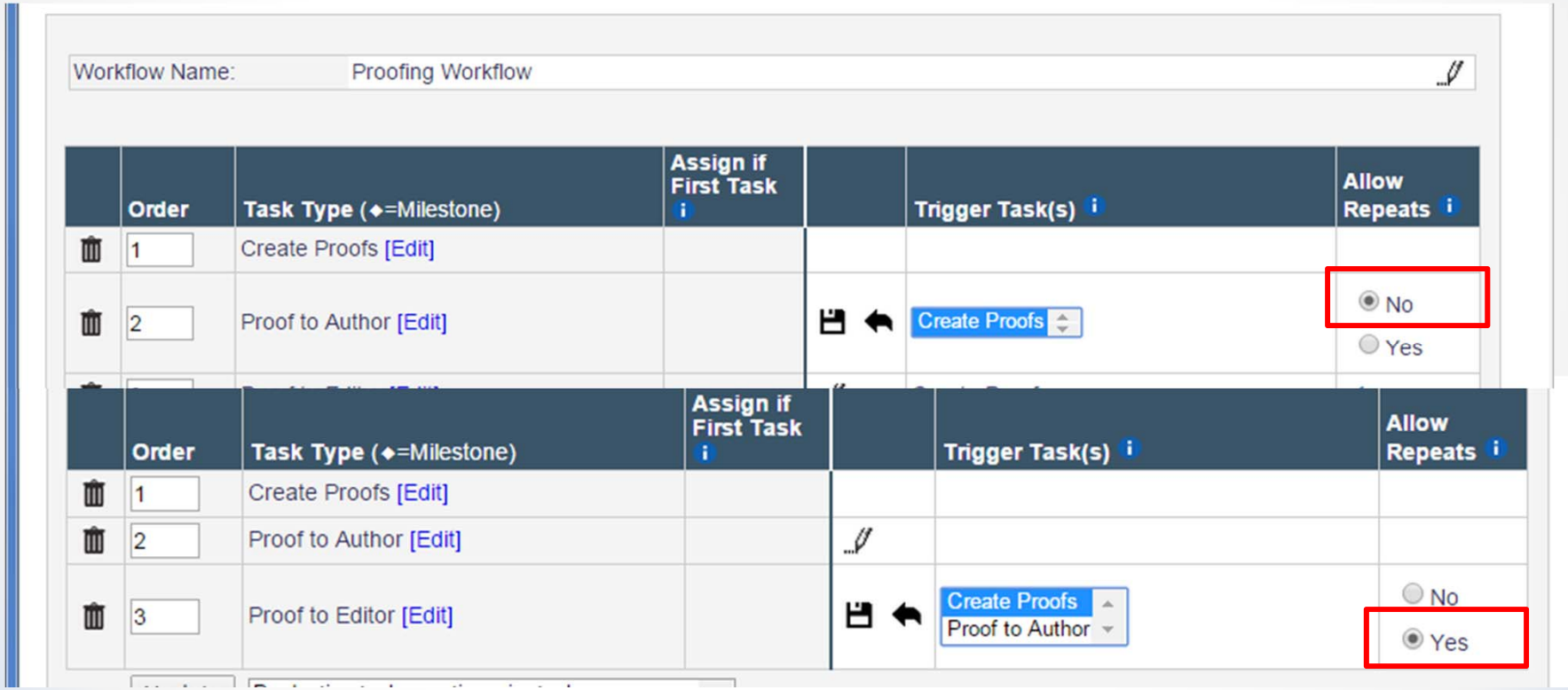
	Order	Task Type (◆=Milestone)	Assign if First Task		Trigger Task(s)	Allow Repeats
🗑	1	Format manuscript [Edit]	✓			
🗑	2	Copy Editing [Edit]		✎	Format manuscript	
🗑	3	Check Artwork [Edit]		✎	Format manuscript	
🗑	4	Typesetting [Edit]		✎	Copy Editing; Check Artwork	

Simple Workflow, configured



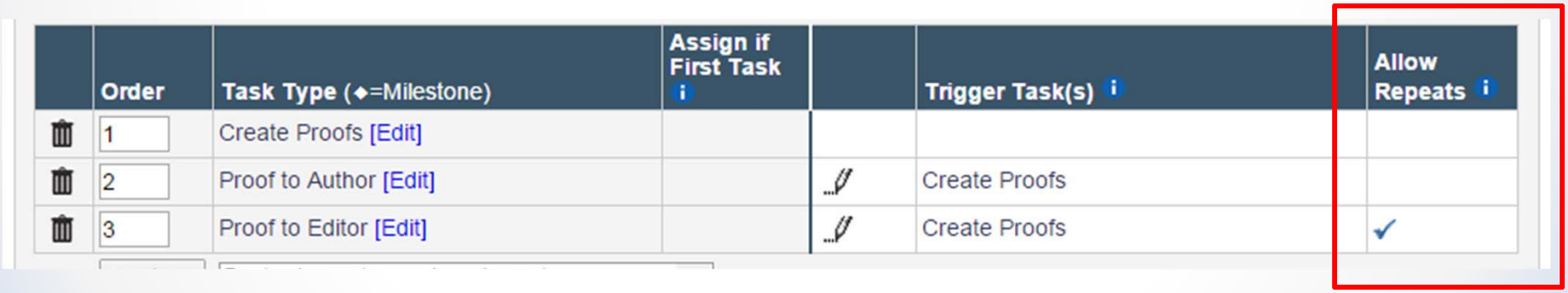
Short Aside #1 – Allow Repeats

- Select ‘Allow Repeats’ to cause task to be automatically reassigned each time trigger task completed.



Short Aside #1 – Allow Repeats

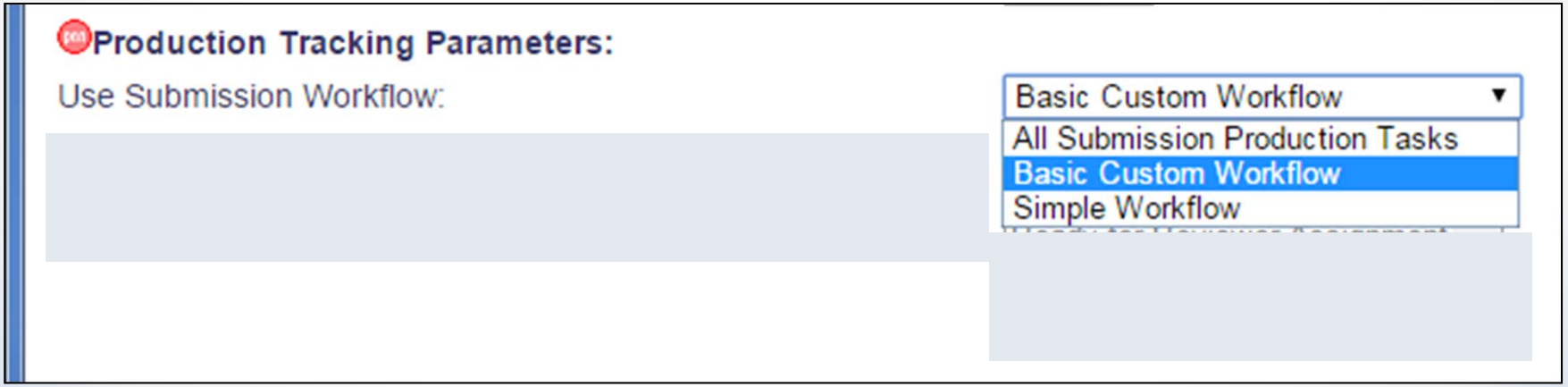
- First time “Create Proofs” is submitted, both “Proof to Author” and “Proof to Editor” are triggered.
- When ‘Create Proofs’ is reassigned and resubmitted:
  - Author does not receive new proof (Allow Repeats=No).
  - Editor DOES receive new proof (Allow Repeats=Yes)



	Order	Task Type (◆=Milestone)	Assign if First Task		Trigger Task(s)	Allow Repeats
🗑	1	Create Proofs [Edit]				
🗑	2	Proof to Author [Edit]			Create Proofs	
🗑	3	Proof to Editor [Edit]			Create Proofs	✓

Link Workflow to Article Type(s)

- "All Submission Production Tasks" is the default production task workflow
- Once custom workflows are created, custom workflow can be selected per Article Type (Edit Article Type page)



Good News!

At 12.0 upgrade:

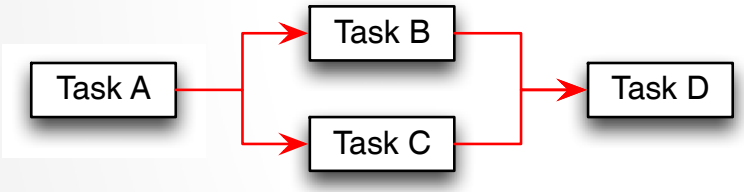
- Existing workflows (including All Submission Production Tasks workflow), are automatically configured!
  - ***Including:*** trigger task selection (if automatic assignment options already selected for tasks)
- No need to edit unless you want to change them!
- Article Types retain their workflow configuration selection

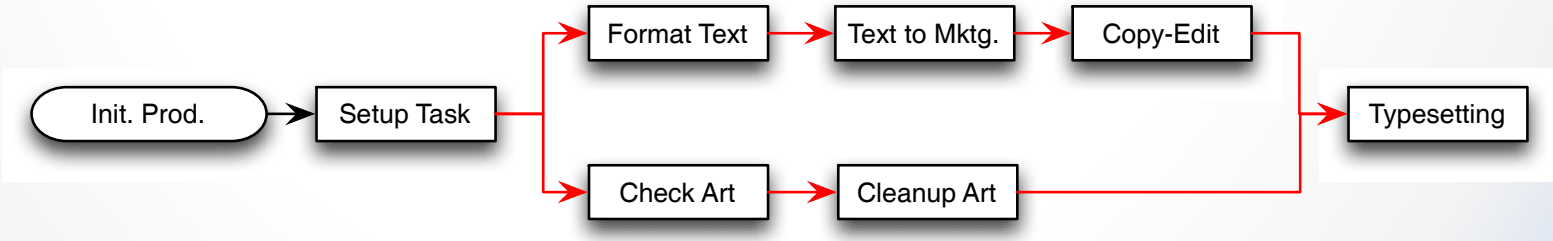
Short Aside #2 -Milestone Tasks

- Milestone Tasks are considered to be Assigned ***and*** Submitted in the same action
  - So the system checks whether other tasks should be automatically assigned when ***assigning*** Milestone tasks
  - Can trigger another milestone task, creating a milestone task 'chain'
- For new Trigger Task functionality, ***assigning*** a Milestone Task:
  - Can trigger multiple task Assignments
  - Will trigger task assignment if it's one of multiple trigger tasks, and no other task is open
  - Can still trigger other milestone tasks, creating the milestone task 'chain'

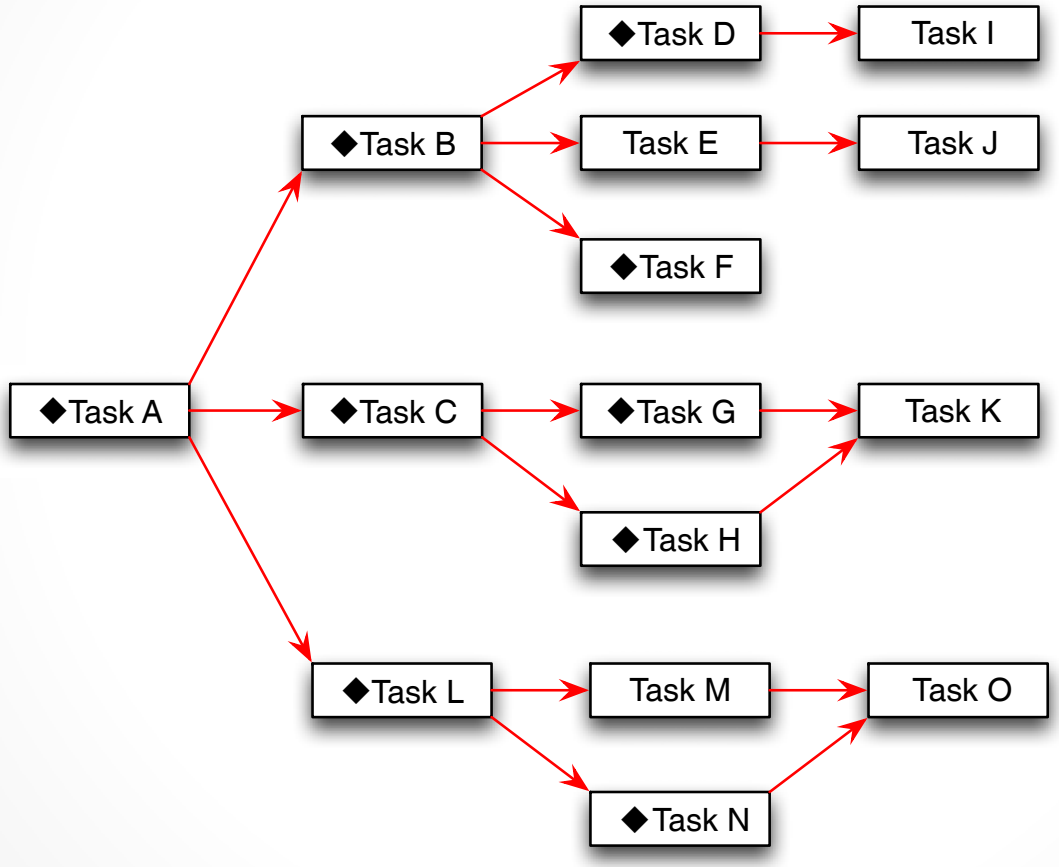
‘Trigger Task’ Assignment Recap

- Submitting one task can automatically assign several other tasks
- A Task can be configured with multiple Trigger tasks; the last assigned Trigger Task to complete will trigger the assignment





Don’t go overboard in 12.0…



(Actual Aries Test case…)

Tips for Task Automation

Vendor-Driven workflow

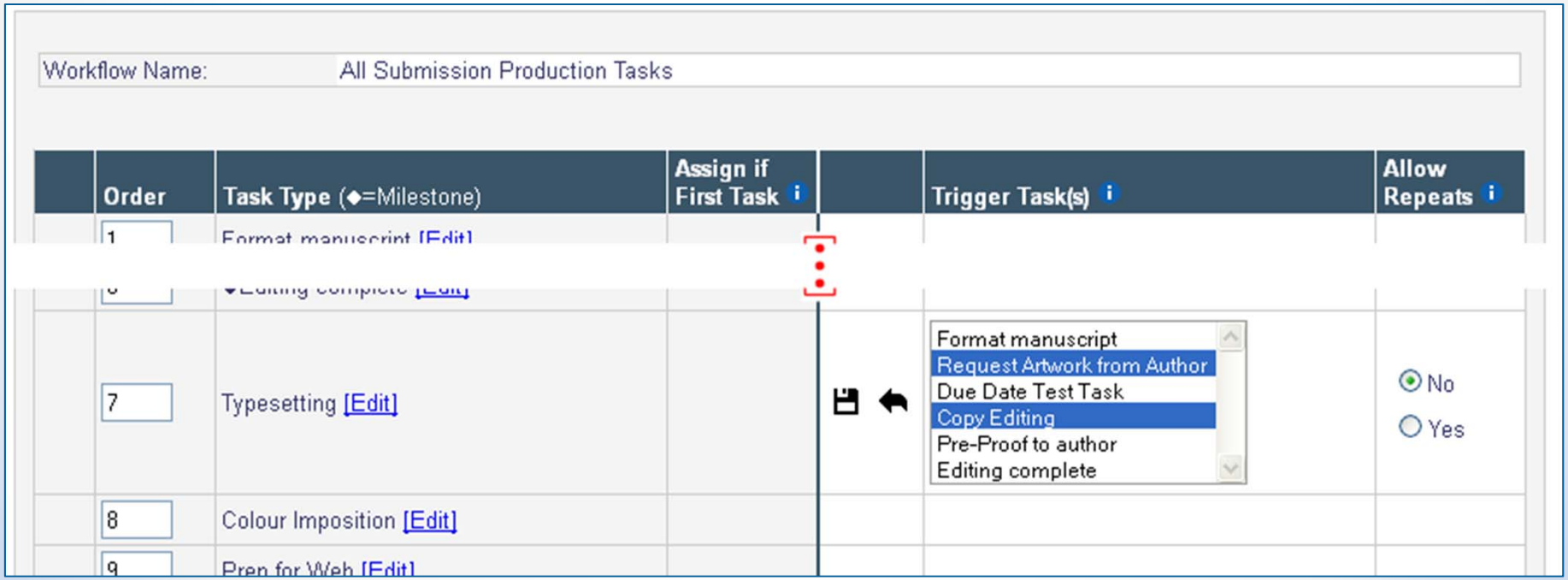
- Tasks can be completed via FTP; this can be used to trigger automatic task assignment
  - Depends on whether you want to triage incoming files
- FTP submission can also be used to update Submission/Schedule Group Metadata
  - Use this to automate metadata updates
  - Can include Additional Manuscript Details, plus some general fields

Optimize Assignment Files

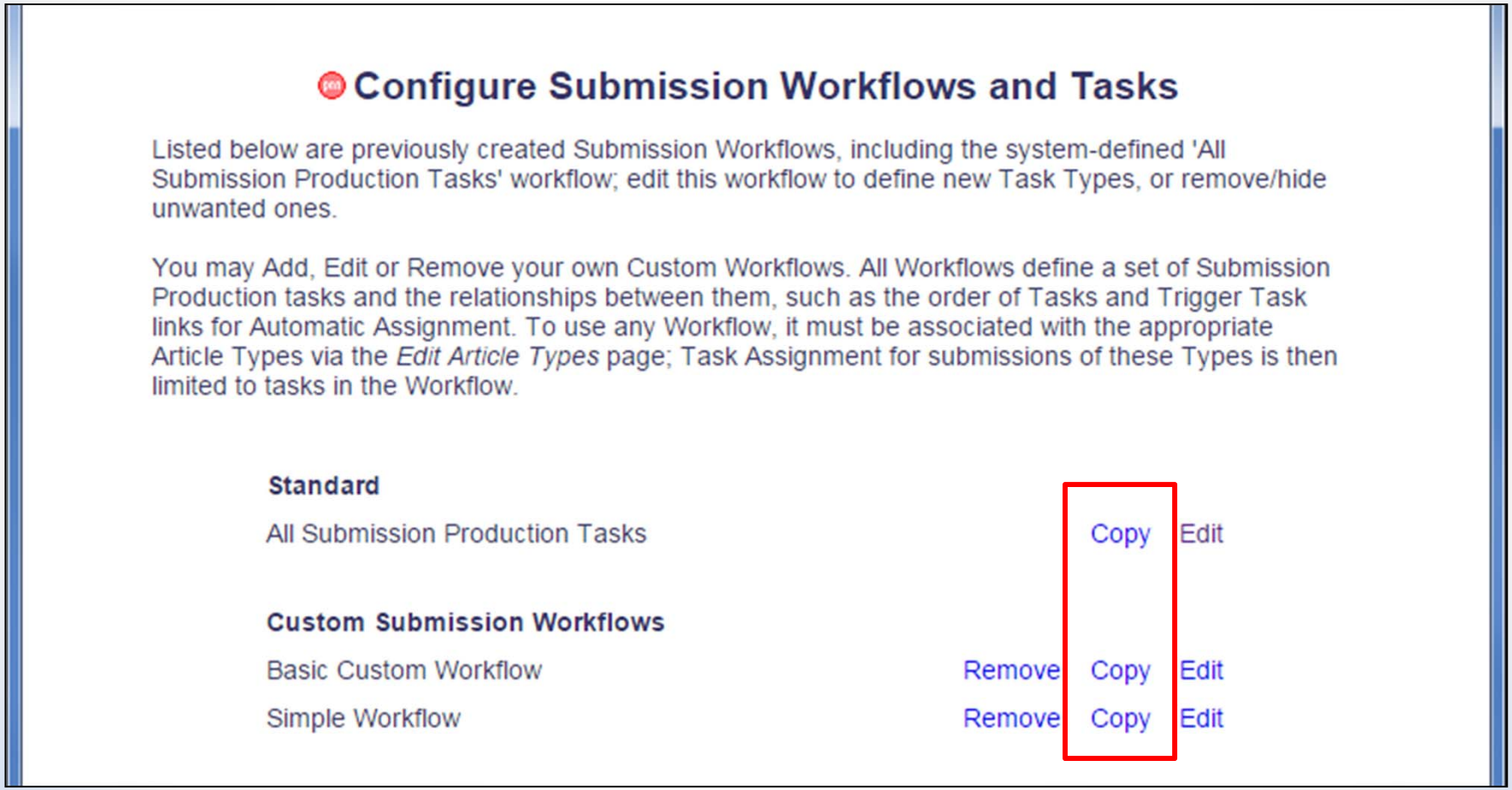
- When Assigning a Task Automatically, the Assignment Files are selected by Item Type
- Multiple types can be selected for Assignment
- When Submitting a Task by FTP, all files returned are assigned the same Item Type
  - Configure these tasks so that files submitted by Task A are selected automatically as Assignment Files for any Tasks that it triggers
  - (Applies to both 11.2 and 12.0 functionality)

12.0: Trigger Task Configuration

- Don't have to create custom workflows – can Edit 'All Submission Production Tasks' workflow and build new triggers for this workflow
  - As mentioned, existing 'next task' relationships are automatically ported to the new 'trigger task' configuration at upgrade



New! Workflows can be copied



Automated Reminders for Production Tasks

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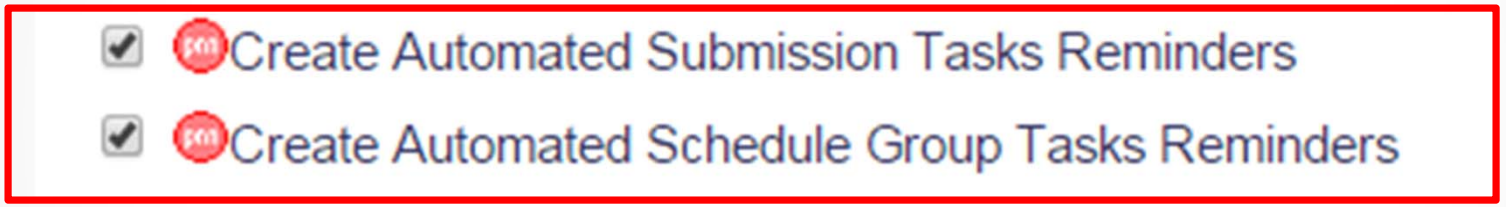
Automated Task Reminders

- Similar to existing Automated Reviewer and Author Revision reminders on Editorial
- For Submission Tasks and Schedule Group Tasks, (based on new RoleManager permissions)
- Editors/Publishers with suitable permissions can create any number of saved Automated Reminders
  - Each is picked up by a nightly batch process run on the EM/PM servers
- Reminders based on:
  - Days after task assignment
  - Days Before/After key dates (Due date, Target Publication Date – submission or Schedule Group)
  - Additional filters (by Article Type, task type, etc.)

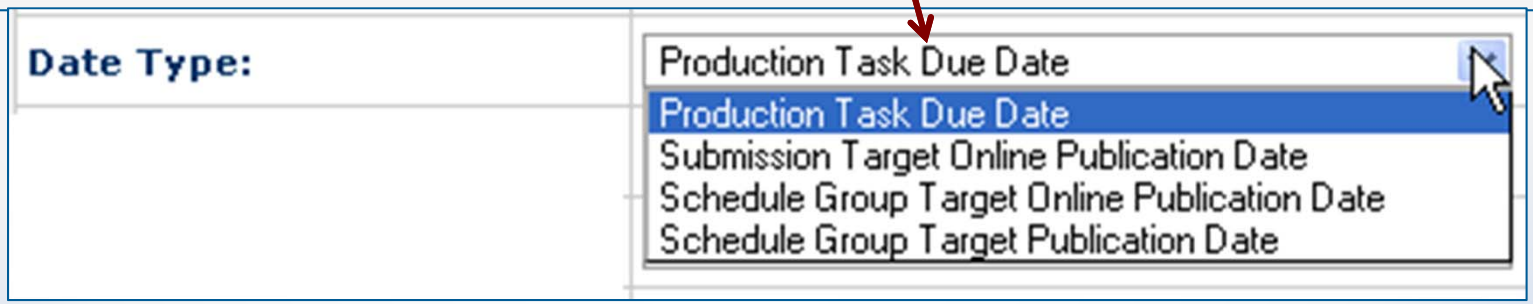
New Editor and Publisher RoleManager Permissions



Automated Submission Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Submission Tasks reminder e-mails will be sent once every 24 hours to each recipient.

Reminder Type:	○ **Outstanding Submission Production Tasks:** Send an automated reminder e-mail to users who were assigned a Submission Production Task [7] days ago. If users have already completed their task, they will not receive a reminder. ○ **Reminder Before Selected Date Type:** Send an automated reminder e-mail to users whose open, assigned Submission Production Task is exactly [10] days before the selected date type. ◉ **Reminder Past Selected Date Type:** Send an automated reminder e-mail to all users whose open, assigned Submission Production Task is exactly [1] days past the selected date type. To send reminders for tasks that are due on the day the reminder report is run, enter 0 days.
Date Type:	Production Task Due Date
Production Task:	(All Production Tasks)
Schedule Group:	(All Schedule Groups)
Reminder Name:	Insert Special Character General 1 day Chase *Maximum 200 characters*
Reminder Letter:	PT - General Reminder



Automated Submission Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Submission Tasks reminder e-mails will be sent once every 24 hours to each recipient.

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

Assigned To:	Author Art Editor (E) Copy Editor (E) Editorial Office	Select All Clear All
Article Type:	Original Article Rapid communication Review Clinical report	Select All Clear All
Section/Category:	Research News and Views No Section Assigned	Select All Clear All

Save as Automated Reminder

Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them. Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the Drag & Drop tool.

There are currently no saved automated reminders.

Automated Submission Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Submission Tasks reminder e-mails will be sent once every 24 hours to each recipient.

Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them.

Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the 'Drag & Drop' tool.

	Reminder Name	Reminder Type	Number of Days	Reminder Creator
	Open Production Tasks Assigned 10 days ago	Outstanding Submission Production Tasks	10	Mary Smith, MD
	Submission Task Due in 10 days from SG Target Online Pub Date	Reminder Before Schedule Group Target Online Publication Date	10	Joe Sample, MD

Automated Schedule Group Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Schedule Group Tasks reminder e-mails will be sent once every 24 hours to each recipient.

Reminder Type:

- **Outstanding Schedule Group Production Tasks:** Send an automated reminder e-mail to users who were assigned a Schedule Group Production Task 7 days ago. If users have already completed their task, they will not receive a reminder.
- **Reminder Before Selected Date Type:** Send an automated reminder e-mail to users whose open, assigned Schedule Group Production Task is exactly 10 days before the selected date type.
- **Reminder Past Selected Date Type:** Send an automated reminder e-mail to all users whose open, assigned Schedule Group Production Task is exactly 7 days past the selected date type.To send reminders for tasks that are due on the day the reminder report is run, enter 0 days.

Date Type: Schedule Group Production Task Due Date

Production Task: (All Production Tasks)

Schedule Group: (All Schedule Groups)

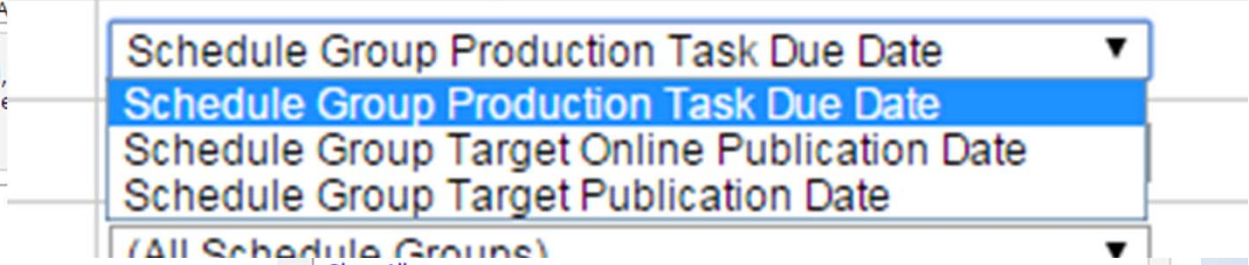
Reminder Name: Insert Special Character

Maximum 200 characters

Reminder Letter: Please Choose an A

You may further refine your result set by selecting all, on your keyboard, while using the mouse to select the desired items.

Assigned To: Associate Editor, Editor-in-Chief, Managing Editor, Publisher — Clear All



Save as Automated Reminder

Automatic Cancellation of Production Tasks when SG closed

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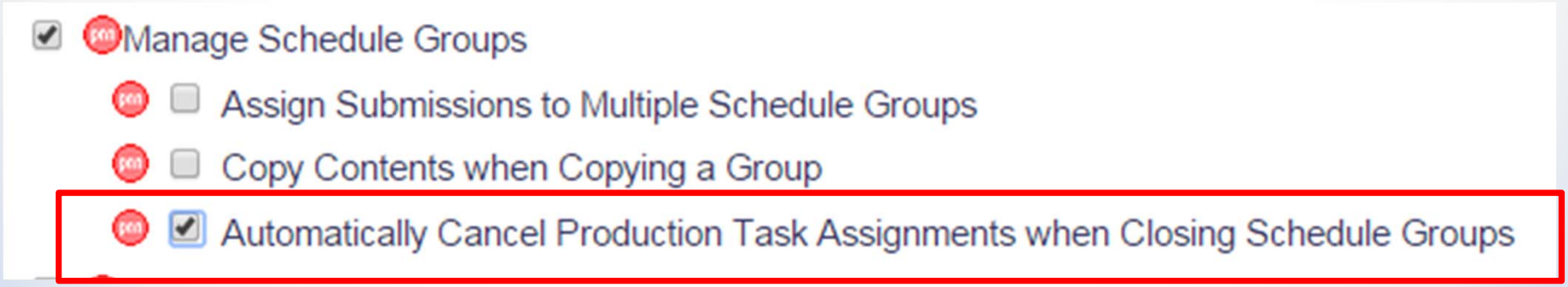
Ending Production

- In 11.2, Production can End Automatically when a specific Submission Production Task Type is completed
  - If no other tasks are open/assigned
- AND, Production can End for all submissions in Schedule Group when Schedule Group is closed, if no open tasks

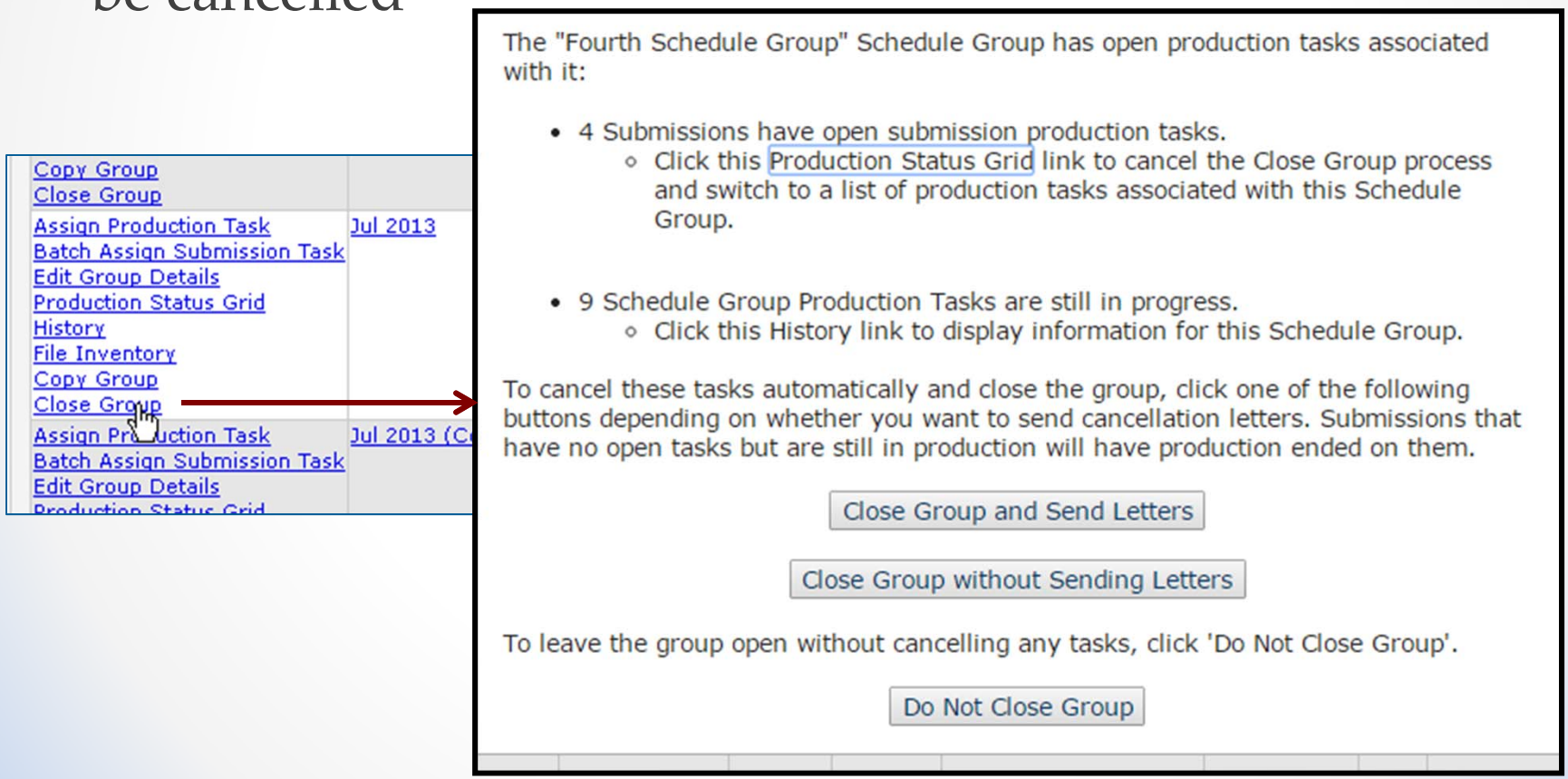
Ending Production

- In 12.0 - new RoleManager permission 'Automatically Cancel Production Task Assignments when Closing Schedule Groups'

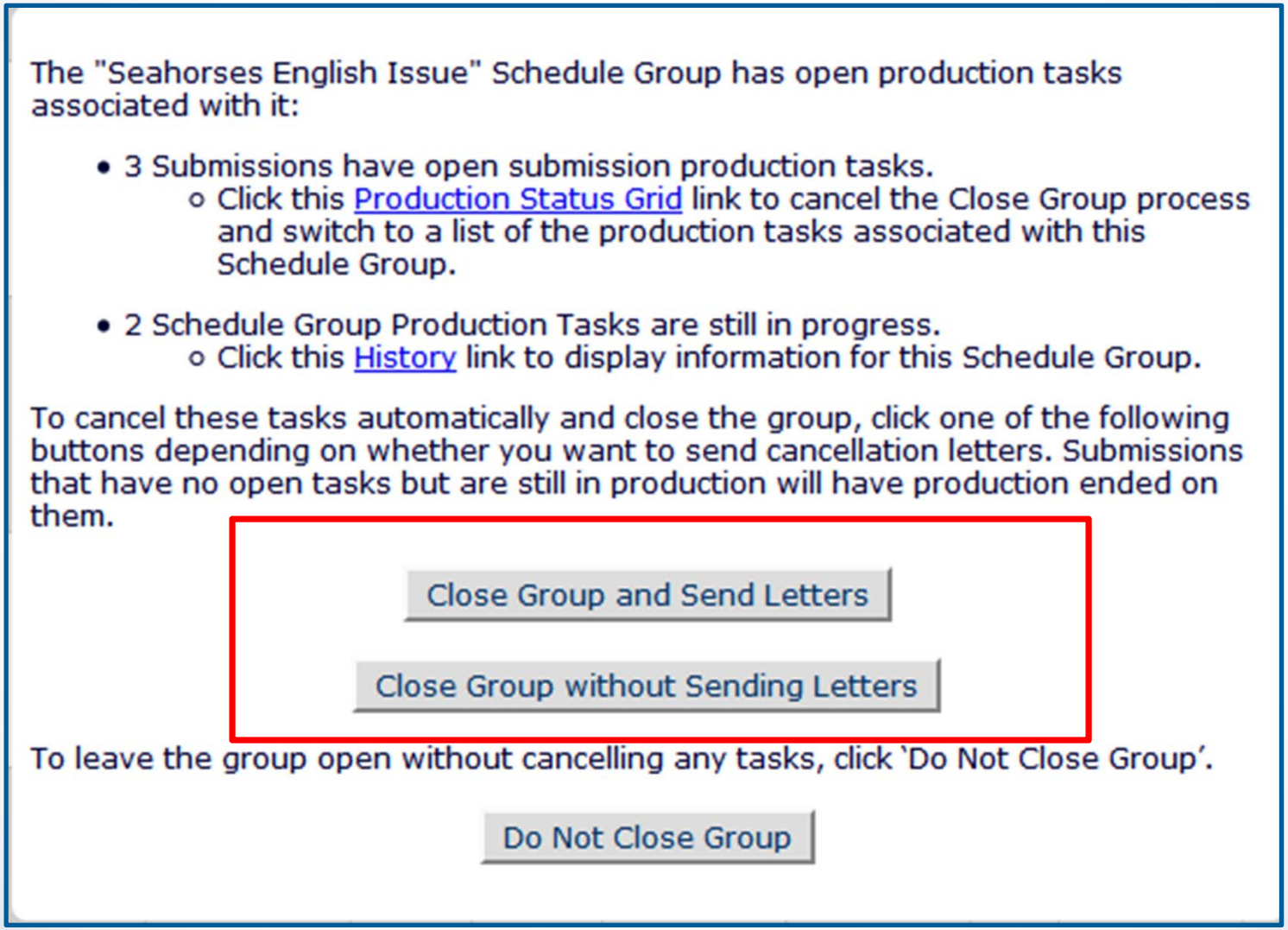


Closing Schedule Group

- Editors/Publishers with new permission can Close Group even if there are open Submission or SG Tasks ; tasks will be cancelled



- Can send task cancellation letters, or cancel tasks and close group without sending letters



Recap - Version 12.0 Enhancements

- Enhanced Submission Production Task Workflow options
- Automated Reminders for Production Tasks
- Automatic Cancellation of Production Tasks when Closing Schedule Group
- JATS Manuscript Import – ProduXion Manager
- Imports initiating production can now trigger the first task in the workflow
  - Specific Import methods

Questions?

THANK
YOU