

Welcome to PMUG 2016



 **ProduXion Manager[®]**
www.ariessys.com


Publish Faster. Publish Smarter.

ProduXionManager

Functionality Review

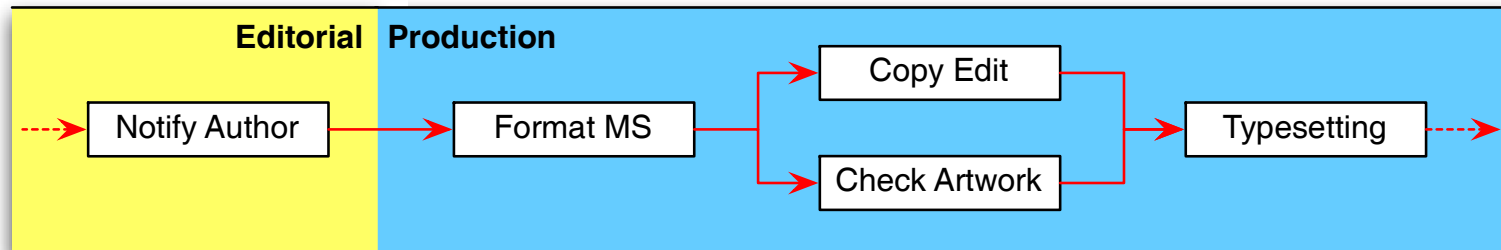
1: Workflow Automation


Streamlining task assignment/completion













Overview





- Assign Task Triggers (for Submission tasks only)
 - When Production is Initiated
 - When selected tasks are completed (Multiple tasks)
 - Now Workflow-specific
- End Production when key task is Submitted
 - Submission task only, all workflows
- FTP submission automates Submit Task step
 - And so, following Tasks can be triggered by suppliers
- Automation imposes restrictions on configuration:
 - Single assignor and assignee
 - FTP Submission allows a single Companion Type


Automating Assignment



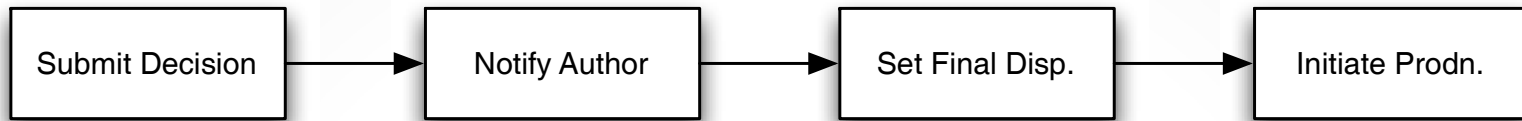
Workflow Name: 

	Order	Task Type (◀=Milestone)	Assign if First Task 		Trigger Task(s) 	Allow Repeats 
	<input type="text" value="1"/>	Format manuscript [Edit]	<input checked="" type="checkbox"/>			
	<input type="text" value="2"/>	Copy Editing [Edit]	<input type="checkbox"/>		Format manuscript	
	<input type="text" value="3"/>	Check Artwork [Edit]	<input type="checkbox"/>		Format manuscript	
	<input type="text" value="4"/>	Typesetting [Edit]	<input type="checkbox"/>		Copy Editing; Check Artwork	
	<input type="text" value="5"/>	Proof checking by Author [Edit]	<input type="checkbox"/>			
	<input type="text" value="6"/>	Prep for Web [Edit]	<input type="checkbox"/>			

 Add Selection(s) to Workflow

• Can Automate Production Initiation



Configure Accept FD ... to Initiate Production

Configure Notification... to Set Accept FD ... to Initiate Production

Configure Automatic Production Initiation

Set/Check the 'Initiate Production upon Setting Final Disposition' box to have EM automatically initiate production when the final disposition on a submission is set to 'Accept'.

[...]

- | | |
|-------------------------|------------------------------------------------------------------------------------------------------------------|
| Regular Submissions: | <input checked="" type="checkbox"/> Initiate Production upon Setting Final Disposition to 'Accept' |
| | <input checked="" type="checkbox"/> Initiate Production upon Setting Final Disposition to 'Accept on Submission' |
| Conference Submissions: | <input checked="" type="checkbox"/> Initiate Production upon Setting Final Disposition to 'Accept and Transmit' |

Cancel Submit

Edit Article Type

Cancel Submit

characters.
name will apply the name change to all submissions of this type, submissions.

y:

Hide When you **Hide** an Article Type, the Article Type will be deactivated (not available for new manuscripts)

[...]

Production Tracking Parameters:

Use Submission Workflow:

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

Short Branching Workflow

Accept as is

Submission Item Parameters:

Edit Submission Production Task

Cancel

Submit

New Production Task Name:

Format manuscript

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

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.

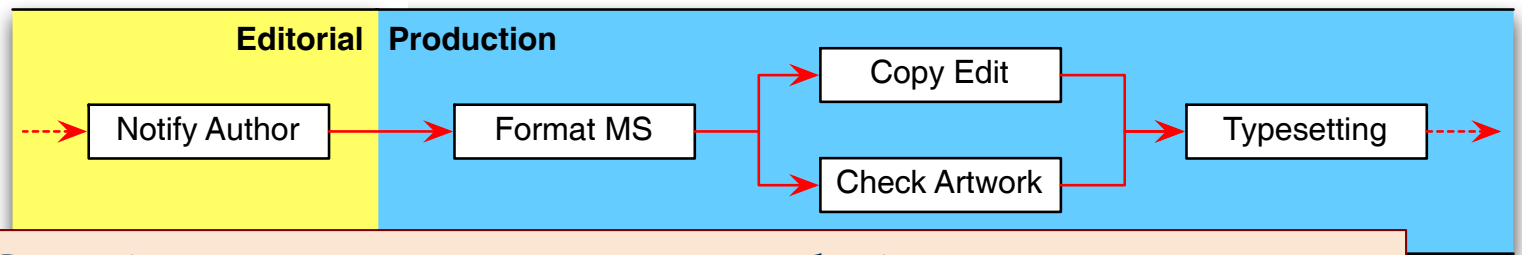
- Assign Automatically when Production is initiated (if this is the first task in the workflow)
- Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)

Automatic End Production when the Task is Completed and there are No Other Open

Automating
First Task
Assignment

Workflow Name: Short Workflow

	Order	Task Type (↔=Milestone)	Assign if First Task	Trigger Task(s)	Allow Repeats
	1	Format manuscript [Edit]	<input checked="" type="checkbox"/>		
	2	Copy Editing [Edit]		//	Format manuscript



• Can Automate remaining Task Assignments

[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

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)

Automatic End Production when the Task is Completed and there are No Other Open

4	Typesetting [Edit]	Format manuscript Copy Editing Check Artwork	<input checked="" type="radio"/> No <input type="radio"/> Yes
---	--------------------	----------------------------------------------------	------------------------------------------------------------------

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). If the task is configured for Automatic Assignment, you must select a single person who will be the sender for all tasks assigned automatically.

Can be Assigned by:

Art Group Editor (E)
Copy Editor (E)
Editorial Office
New test Prod Ed
Production Controller
Test editor role
Typesetter (E)

Arnolde Author-Three, Editorial Office
Language Editor, Editorial Office
John MacJohn, Editorial Office

Automating Tasks requires a single Assignor and Assignee...

Can be Assigned to:

- Corresponding Author only
 Selected Editor/Publisher Roles only

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). If the task is configured for Automatic Assignment, you must select a single person to be the sender for all tasks assigned automatically.

Editorial Office
Issue Controller
New test Prod Ed
Printer
Production Controller
Test editor role
Typesetter (E)

Technical Typesetting,
Glaswegian Printer, Print

If 'Automatically Select Files for Assignment' is enabled, files in the submission File Inventory that match the configured File Types will appear pre-selected for manual task assignment or will be automatically included when a task is assigned automatically.

Automatically Select Files for Assignment

Configure the Item Types for automatic selection. 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 the task is an FTP task requiring a File on assignment, and the Task is configured to be Assigned Automatically, you must select an item here for the task to ever be assigned.

[System-Generated PDF]
Abstract
Author Corrections (P)
Colour proof (P)
Copyedited Text (P)
Corrected Artwork (P)
Corrected Proof (P)

If 'Automatically Select Files for Assignment' is enabled, files in the

...and usually selection of a Companion File Type to be assigned automatically.

Follow-on Task Assignments allow the selected editors/publishers who complete this kind of task to immediately assign another task. Remember to configure the **Can be**

Submit Task Automation

- Have vendors submit files (and XML) to complete tasks
- And update metadata when they do so

FTP Options

Submission Production Task Transmittal Method:

None

- 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 file names

FTP Server address
(e.g. ftp.ariessys.com):

Username

Password

Subdirectory:

E-mail Address (for
transmittal notification):

Submission Production Task Import Profile:

E-mail Address (for import
notification):

Aries Import

trash1@ariessc.com

- XML file is required

[Select Fields for Import](#)

Select Fields For Import

Select the fields to be imported for this production task. Identifying information is designated with a check mark and cannot be overwritten during import.

These fields will also be written to the Aries Import XML file sent in the production task transmittal, if the checkbox "Include Aries Import XML file in the transmittal" is selected on the Production Task configuration page.

[Expand All](#)

[Collapse All](#)

Identifying Information:

General Manuscript Information:

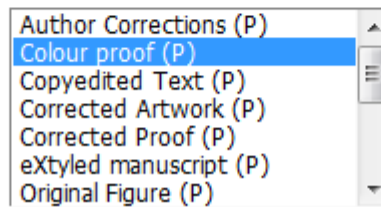
Additional Manuscript Details

Schedule Group TOC Information

- Target Table of Contents Position
- Target Start Page
- Target End Page
- Target Number of Pages

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 Submission Item 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 Production Task Import Method, 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.



FTP Submission requires all files be given the same Companion File Type.

- As well as triggering task assignment, Submitting a Task can now End Production Automatically on a Submission

Automatic End Production when the Task is Completed and there are No Other Open Tasks in the Workflow.

- End Production Automatically after this task is Completed

Could we extend Automation?

- Have you encountered any workflow problems?
 - Any situations the current trigger rules cannot handle?
 - Are there other kinds of rules we should consider?
- Is it flexible enough? Any areas that seem too restrictive?
- Anything else that needs to be definable by workflow?

2: Scheduling

Knowing when to finish a Task

Overview

- Two types of 'scheduling'
- Reactive: Due dates when assigning Submission and Schedule Group Task
 - Gives 'Missed Target' warnings on assignment
- Forward Planning/Submission Schedule:
 - 'Must Start By' Dates and Slip values for submission
 - Initially calculated on Initiating Production
- Schedule information shown on PSG
 - Also special 'At Risk' folder for submission slip

- Reactive: Calculates Due Date
- And warns if we have missed last Due Date to hit a target

**Assign Production Task For Manuscript Number: Unassigned
John M MacJohn (UNITED KINGDOM): "Test paper 5 for ESIS 2.1 demo"**


Schedule Group: Dec 2014 - 22(4)

Production Task: Typesetting

Warning: the following scheduled dates for this task have already passed and the system will ignore them when determining a default Due Date. You should check the due date in case you wish to enter a different date to compensate for this.

- Due Date of 01 Dec 2014 to meet the Schedule Group Target Publication Date (31 Dec 2014)

Task Assigned to: Terry Typesetter / Typesetter

Due Date:  (mm/dd/yyyy)

- Advance Schedule: Must Start by Dates and slip
- Uses similar calculations to Due Date

Production Status Grid

Filter By: Dec 2014 - 22(4) Grand Totals Download Data Switch to Traditional View Display 25 results per page. Grid Options

Action	Manuscript Number	Author Name	Article Title	Production Status	Date Production Started	Format MS	Copy-Editing	Typesetting	All Corrections Done (MS)	Printing	T S t
Action Links		Mr John M MacJohn (UNITED KINGDOM)	Test paper 5 for ESIS 2.1 demo	Being Copy-Edited	24 Oct 2014	Submitted 19 Mar 2015 John M MacJohn	Due 24 Mar 2015 Fred Test-person	Must Start: 21 Nov 2014		Must Start: 24 Dec 2014	M 0:
						Slip: 126 days	Slip: 418 days	Slip: 416 days		Slip: 383 days	Sl
Action Links	Test-Dec14-0001	Dr Anne A. Author (UNITED KINGDOM)	Sample submission for IJCR	Production Started	23 Oct 2014	Must Start: 11 Nov 2014	Must Start: 14 Nov 2014	Must Start: 21 Nov 2014		Must Start: 24 Dec 2014	M 0:
						Slip: 426 days	Slip: 423 days	Slip: 416 days		Slip: 383 days	Sl
Action Links	testy-15	Mr John M MacJohn (UNITED KINGDOM)	Testing review merge codes.		10 Jun 2014			Must Start: 21 Nov 2014		Must Start: 24 Dec 2014	
								Slip: 416 days		Slip: 383 days	

Submissions 1 to 3 of 3
Return To: [Submission Tasks Reminder Report](#) | [Schedule](#)

Slip is based on current date and/or last task assigned

Set in advance of task assignments, show undefined if no target Publication Dates set

Production Status Grid

Filter By: Another test of SG Addition Grand Totals Download Data Switch to Traditional View Display 25 results per page. Grid Options

Action	Manuscript Number	Author Name	Article Title	Production Status	Date Production Started	Format MS	Copy-Editing	Typesetting	All Corrections Done (MS)	Printing	T S t
Action Links	JXYZ 123456	Dr Arnolde Author-Three (UNITED KINGDOM)	Test of latency again	Production Started	23 Oct 2014	Must Start: Undefined	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	M U
Action Links	JXYZ31	Dr Anne A. Author (UNITED KINGDOM)	Another test of Editor's names.	Production Started	29 Jul 2014	Must Start: Undefined	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	M U
Action Links	Testing-TT17991-61-0001R	Dr Anne A. Author (UNITED KINGDOM)	Testing 61 and TT17990 after upgrade.		11 Nov 2008	Due 27 Jun 2013 Paul Roduction	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	

- Both use Due Date: Task settings in similar ways:

Configure Submission PT

Scheduling and Due Date Options

- Show Task in Production Status Grid
- Include this task in 'At Risk' and 'Must Start By' date display

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

'At Risk' & 'Must Start By' is 'Advance' scheduling option

Configure Schedule Group PT

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:

- Due Date (Reactive): adds '# Days after Assignment' to today
- Allows for Working days and Holidays if configured

	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
Holiday Dates:																										
Only 'Calendar Days' set	-	1	2	3	4	5	6	7	8	9	10															
Calendar days AND Holidays set	-	1	2	3	4	5	6	...	...	...	...	7	8	9	10											
Only 'Working Days' set	-	1	2	3	4	5	...	...	...	6	7	8	9	10										
Working Days AND Holidays set	-	1	2	3	4	...	...	...	...	5	6	7	8	...	...	...	9	10						

- But also calculates 'Days Before Target Publication Dates'
- Looking for overlap

	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
Holiday Dates:																																	
With only Calendar Days Set:																																	
Date from SG Target Pub Date:																																	
Date from SG Target Online Pub Date:																																	
Date from Sub Target Online Pub Date:																																	
Date from Assignment:																																	

^^ Due date is set to the 11th

- Overlap pushes Due Date forward...

	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su					
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
Holiday Dates:																																				
With Calendar Days AND Holidays Set:																																				
Date from SG Target Pub Date:																						10	9	8	7	6	5	4	3	2	1	-				
Date from SG Target Online Pub Date:																						10	9	8	7	6	5	4	3	2	1	-				
Date from Sub Target Online Pub Date:																						10	9	8	7	6	5	4	3	2	1	-				
Date from Assignment:	-	1	2	3	4	5	6	...	...	...	...	7	8	9	10																	
	^^ Due date is set to the 14th, calculated from a Target Publication date																																			
Holiday Dates:																																				
With only Working Days Set:																																				
Date from SG Target Pub Date:																						10	9	8	7	6	5	4	3	2	1	...	-	
Date from SG Target Online Pub Date:																						10	9	8	7	6	5	4	3	2	1	-
Date from Sub Target Online Pub Date:																						10	9	8	7	6	5	4	3	2	1	...	-	
Date from Assignment:	-	1	2	3	4	5	6	7	8	9	10																				
	^^ Due date set to the 11th																																			

- ...until you miss a date completely

	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su					
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
Holiday Dates:																																				
With Working Days AND Holidays Set:																																				
Date from SG Target Pub Date:																						10	9	8	7	6	5	4	3	2	1	...	-	
Date from SG Target Online Pub Date:																						10	9	8	7	6	5	4	3	2	1	-
Date from Sub Target Online Pub Date:																						10	9	8	7	6	5	4	3	2	1	...	-	
Date from Assignment:																						-	1	2	3	4	5	6	7	8	9	10
	^^ A warning message is given for missing this target date (11th) completely ^^ The due date is set to the 14th (just 1 day away) to meet the next earliest																																			

Warning: the following scheduled dates for this task have already passed and the system will ignore them when determining a default Due Date. You should check the due date in case you wish to enter a different date to compensate for this.

- Due Date of 01 Dec 2014 to meet the Schedule Group Target Publication Date (31 Dec 2014)

- Advance Schedule: Must Start by Dates and slip
- Uses similar calculations to Due Date

Production Status Grid

Filter By: Dec 2014 - 22(4) Grand Totals Download Data Switch to Traditional View Display 25 results per page. Grid Options

Action	Manuscript Number	Author Name	Article Title	Production Status	Date Production Started	Format MS	Copy-Editing	Typesetting	All Corrections Done (MS)	Printing	T S t
Action Links		Mr John M MacJohn (UNITED KINGDOM)	Test paper 5 for ESIS 2.1 demo	Being Copy-Edited	24 Oct 2014	Submitted 19 Mar 2015 John M MacJohn	Due 24 Mar 2015 Fred Test-person	Must Start: 21 Nov 2014		Must Start: 24 Dec 2014	M 0:
						Slip: 126 days	Slip: 418 days	Slip: 416 days		Slip: 383 days	Sl
Action Links	Test-Dec14-0001	Dr Anne A. Author (UNITED KINGDOM)	Sample submission for IJCR	Production Started	23 Oct 2014	Must Start: 11 Nov 2014	Must Start: 14 Nov 2014	Must Start: 21 Nov 2014		Must Start: 24 Dec 2014	M 0:
						Slip: 426 days	Slip: 423 days	Slip: 416 days		Slip: 383 days	Sl
Action Links	testy-15	Mr John M MacJohn (UNITED KINGDOM)	Testing review merge codes.		10 Jun 2014			Must Start: 21 Nov 2014		Must Start: 24 Dec 2014	
								Slip: 416 days		Slip: 383 days	

Submissions 1 to 3 of 3
Return To: [Submission Tasks Reminder Report](#) | [Schedule](#)

Slip is based on current date and/or last task assigned

Set in advance of task assignments, show undefined if no target Publication Dates set

Production Status Grid

Filter By: Another test of SG Addition Grand Totals Download Data Switch to Traditional View Display 25 results per page. Grid Options

Action	Manuscript Number	Author Name	Article Title	Production Status	Date Production Started	Format MS	Copy-Editing	Typesetting	All Corrections Done (MS)	Printing	T S t
Action Links	JXYZ 123456	Dr Arnolde Author-Three (UNITED KINGDOM)	Test of latency again	Production Started	23 Oct 2014	Must Start: Undefined	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	M U
Action Links	JXYZ31	Dr Anne A. Author (UNITED KINGDOM)	Another test of Editor's names.	Production Started	29 Jul 2014	Must Start: Undefined	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	M U
Action Links	Testing-TT17991-61-0001R	Dr Anne A. Author (UNITED KINGDOM)	Testing 61 and TT17990 after upgrade.		11 Nov 2008	Due 27 Jun 2013 Paul Roduction	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	

How could we improve Scheduling?

- What issues do you have? Limitations?
- How much do you rely on MSB dates? Do you check Slips?
- Do you drive reports from the schedule?
- Could it be expanded/extended? To cover what?

3: Production Status Grid

Viewing Submission Progress

Overview

- Lists Submissions
 - Schedule Group selectable as a filter
- Intended to be *the* central view of workflow progress
 - 'Spreadsheet' or T-Card-like
- First fully customizable layout
 - Soon to be replaced with new 'power grid'; faster.

Configure Submission PT

Scheduling and Due Date Options

- Show Task in Production Status Grid
- Include this task in 'At Risk' and 'Must Start By' date display

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.

Production Status Grid

Filter By: Another test of SG Addition Grand Totals Download Data Switch to Traditional View Display 25 results per page. Grid Options

Action	Manuscript Number	Author Name	Article Title	Production Status	Date Production Started	Format MS	Copy-Editing	Typesetting	All Corrections Done (MS)	Printing	T S t
Action Links	JXYZ 123456	Dr Arnolde Author-Three (UNITED KINGDOM)	Test of latency again	Production Started	23 Oct 2014	Must Start: Undefined	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	M U
Action Links	JXYZ31	Dr Anne A. Author (UNITED KINGDOM)	Another test of Editor's names.	Production Started	29 Jul 2014	Must Start: Undefined	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	M U
Action Links	Testing-TT17991-61-0001R	Dr Anne A. Author (UNITED KINGDOM)	Testing 61 and TT17990 after upgrade.		11 Nov 2008	Due 27 Jun 2013 Paul Roduction	Must Start: Undefined	Must Start: Undefined		Must Start: Undefined	

- Simply configure Submission Tasks to appear in the PSG
- Submission Scheduling will display for these tasks if also configured

New Grid coming soon

Grand Totals			
	Number of Pages	Black and White Image Count	Color Image Count
Budget	124	60	12
Current	4	10	5

Production Status Grid

Show: Jan 2013 - 20(1)

Quicklinks



Page: 1 of 1 (4 total submissions)

1

100 results per page.

Action	Manuscript Number	Author Name	Production Status	Printing	Copy Editing	Typesetting	Colour Imposition	Prep for Web	Format m
Action Links	JXYZ53	Anne Author			Submitted Mar 01 2006 04:53AM Charlie Copy-Editor	Must Start: Dec 02 2012 12:00AM		Must Start: Dec 27 2012 12:00AM	
Action Links	JXYZ34	Anne Author	[Not Copy-Edited]; [Not Web Prepped]	Must Start: Jan 09 2013 12:00AM Slip: 1097 days	Must Start: May 31 2007 12:00AM Slip: 3147 days	Must Start: May 31 2007 12:00AM Slip: 3147 days		Due Jun 17 2007 11:59PM John MacJohn Slip: 3130 days	Due Jun 17 2007 John MacJoh
Action Links	JXYZ21	Anne Author	[Not Copy-Edited]; [Not Web Prepped]	Must Start: Jan 09 2013	Must Start: May 31 2007	Must Start: May 31 2007		Must Start: Jun 15 2007	Due
Action Links	Dansowntest-1	John MacJohn							

Grid Options

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

Column Header	Fixed	Show
Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manuscript Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Author Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Production Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Printing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Copy Editing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Typesetting	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Colour Imposition	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Your Time: 16:0

Is the PSG OK as is?

- Does anyone NOT use the PSG or deliberately avoid it?
- Do we need to add more information to it?
- Can you find out all you need to know from it?

4: User-Defined Production Statuses

Summarize progress through workflow

Overview

- Submission-Specific
- ALL statuses re-evaluated and term rebuilt whenever any task is assigned/cancelled/submitted
- 'Jigsaw' or composite term – you build up mini-terms, system applies all that match current set of assigned states.
- Intended to be flexible.
- Assess 'ever been assigned'/'Is in Progress'/'Has ever been completed' states in Task History

Edit Production Status

Cancel

Submit

[Insert Special Character](#)

Production Status Name:

Maximum Production Status Name is 100 characters

Hide When you **Hide** a custom Production Status, the Status term will no longer appear on Production Tracking pages.

Select "Record in History" to ensure the Production Status History lists the date when a submission enters this status. You should check that users are able to view the Production Status History by setting the correct permissions in RoleManager.

Record in History

Status Rules

Whenever an action relating to a production task is carried out, the system checks the rules related to each status. If the following criteria are true for the submission this status will be added or retained if already set; if the following criteria are false, then this status will not be added or will be removed if already set.

(	Criterion	Is/Is not	Selector	Value)		
<input "="" type="text" value="("/>	<input type="text" value="Copy-Editing In Progress"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="True"/>	<input type="text" value=")"/>	<input type="text" value=""/>	<input type="text" value=""/>
							<input type="button" value="Add"/>

Cancel

Submit

- Ex: 'Awaiting Action' to complement 'In Progress' statuses

Production Status Name:
Maximum Production Status Name is 100 characters

(	Criterion	Is/Is not	Selector	Value)		
	<input type="text" value="Copy-Editing In Progress"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="True"/>			

Edit Production Status

[Insert Special Character](#)

Production Status Name:
Maximum Production Status Name is 100 characters

(	Criterion	Is/Is not	Selector	Value)		
<input type="checkbox"/>	<input type="text" value="Format MS In Progress"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="False"/>		<input type="text" value="AND"/>	<input type="button" value="Remove"/>
<input type="checkbox"/>	<input type="text" value="Copy-Editing In Progress"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="False"/>		<input type="text" value="AND"/>	<input type="button" value="Remove"/>
<input type="checkbox"/>	<input type="text" value="Typesetting In Progress"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="False"/>		<input type="text" value="AND"/>	<input type="button" value="Remove"/>
<input type="checkbox"/>	<input type="text" value="Author Proofing In Progress"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="False"/>		<input type="text" value="AND"/>	<input type="button" value="Remove"/>
<input type="checkbox"/>	<input type="text" value="Typeset Corrections In Progress"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="False"/>		<input type="text" value="AND"/>	<input type="button" value="Remove"/>
<input type="checkbox"/>	<input type="text" value="Printing In Progress"/>	<input type="text" value="is"/>	<input type="text" value="Equal To"/>	<input type="text" value="False"/>			<input type="button" value="Remove"/>

- ‘Started’ really means ‘Has Ever Been Started’
- Example: a ‘New In Production’ Type Status status
 - Check is that no Task of any Type has ever been started:

Production Status Name:

Maximum Production Status Name is 100 characters

(	Criterion	Is/Is not	Selector	Value)		
<input type="checkbox"/>	Format MS Started	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Copy-Editing Started	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Typesetting Started	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Author Proofing Started	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Typeset Corrections Started	is	Equal To	False		AND	Remove
<input type="checkbox"/>	Printing Started	is	Equal To	False			Remove
							Add

- Example: a 'Ready for Next Task' Type Status status
 - Check: that previous Task has been completed at least once;
 - and that the 'Ready for' Task and all subsequent tasks have never been started

Production Status Name:

Maximum Production Status Name is 100 characters

(	Criterion	Is/Is not	Selector	Value)		
<input type="checkbox"/>	Typesetting Completed	is	Equal To	True	<input type="checkbox"/>	AND	<input type="button" value="Remove"/>
<input type="checkbox"/>	Author Proofing Started	is	Equal To	False	<input type="checkbox"/>	AND	<input type="button" value="Remove"/>
<input type="checkbox"/>	Typeset Corrections Started	is	Equal To	False	<input type="checkbox"/>	AND	<input type="button" value="Remove"/>
<input type="checkbox"/>	Printing Started	is	Equal To	False	<input type="checkbox"/>		<input type="button" value="Remove"/>
							<input type="button" value="Add"/>

Are current Statuses Sufficient?

- What's important to you? Measuring progress or assessing current activity or state?
 - I.e. what models do you use?
 - 'X in Progress'/'Awaiting Action'?
 - 'Ready for X'/'Y Completed'?
- What else could affect status?

5: Issue Make-up, planning, pagination

Planning your publication

Overview

- Schedule Group TOC. Can contain:
 - Section Headers. Added directly
 - Submissions. Added on initiating production, by editing TOC, by assigning submission to SG
- Pagination typed in
 - Although page numbers can be supplied by e.g. Typesetter by submitting XML to close Task

SG ToC

Target Number of Submissions:	12
Page Budget:	128
Black and White Image Budget:	48
Color Image Budget:	

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

Table of Contents

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	Submission Actual Online Date	Black and White Image Count	Color Image Count
Production Details ▾ Transmittal Form Remove from Group Linked Submissions	1	testy-15	Rapid communication	John M MacJohn	12	1	12		Testing review merge codes.		30 Jun 2014		12	0
+ Additional Manuscript Details														
Production Details ▾ Transmittal Form Remove from Group Linked Submissions	2	Test-Dec14-0001	Original Article	Anne A. Author	0	0	0	Production Started	Sample submission for IJCR				0	0
+ Additional Manuscript Details														
Remove Header Edit Header	3		Letters to the Editor		0									
Production Details ▾ Transmittal Form Remove from Group Linked Submissions	4		Letter to the Editor	John M MacJohn	0	0	0	Being Copy-Edited	Test paper 5 for ESIS 2.1 demo				0	0
+ Additional Manuscript Details														

- Budgets tracked; budgeted/totals shown in some pages
 - Manage Schedule Groups
 - PSG once an SG is selected
- Submissions can belong to multiple SGs

Manage Schedule Groups

Page: 1 of 1 (9 total Schedule Groups)

Display 10 results per page.

# Action	Schedule Group	Target Number of Submissions	Current Number of Submissions	Page Budget	Current Page Total	Target Publication Date	Target Publication Volume	Year	Target Publication Issue	Target Online Date	Black and White Image Budget	Color Image Budget	Current Black and White Image Total	Current Color Image Total
Action Links	1(1-2) - Inaugural Double Issue	12	5	126	140	31 Jan 2013	1		1-2		20	12	10	7
Action Links	1(3) - Mar 2013 Issue	12	0	196	0	01 Mar 2013	1		3		48	12	0	0
Action Links	Another test of SG Addition	19	3	0	13		99		9		0	0	5	3
Action Links	Copied SG	0	0	0	0						0	0	0	0
Action Links	My Testing to 10-63	0	1	0	14						0	0	0	0
Action Links	test 2 for Publisher X	0	1	0	0		3		2		0	0	12	0
Action Links	Test for Publisher X	0	0	0	0		3		1		0	0	0	0
Action Links	Test Schedule Group AdditionB	999	4	99	49		21		1		99	9	18	2
Action Links	Dec 2014 - 22(4)	12	3	128	12	31 Dec 2014	22	2014	4	01 Dec 2014	48	0	12	0

Page: 1 of 1 (9 total Schedule Groups)

Display 10 results per page.

[Add Schedule Group](#)

Planned ToC Changes:

- Proposals can be assigned to Schedule Groups from Editorial Side
- Act as kind of 'section' containing related submissions.
 - Invited submissions will be added to group and visible when in Editorial
 - Initially as 'Associated with Group'; moving into group proper when production is initiated.

Issue Makeup Queries

- What strategies do you use for adding submissions?
 - Edit ToC and add several? Push submissions in 1-by-1?
- Do you cast-off/calculate paginations in advance?
 - Or just wait for the typesetter to advise?
- Do you report/drive pagination from PM?
 - E.g. download ToC
- Is anything missing from the SG?
 - What other things could a ToC contain?

Priorities

Which is most important?

Which one first?

- So, where are the improvements that could save you time/money?
 - Workflow and Automation
 - Scheduling
 - The Production Status Grid/overview of status
 - Submission Status reporting
 - Issue/ToC makeup and pagination?

Thank You!