ProduXion Manager User Group

Tony Alves, Director, Product Management
Caroline Webber, Senior Systems Analyst
Michael Hambloch, Reporting Specialist
Melanie Cotterell, Client Services Manager

16th Annual
em Editorial Manager®
User Group Meeting

Aries systems

Agenda

Introductions – 5 minutes

New Functions – 15 minutes

Wish-listing – 20 minutes

Reports Overview – 15 minutes

Report Fun! – the rest of the minutes

Production Task Deep Link – 15.0

Deep links in emails deliver recipients directly to the place in the system that requires attention. These links are a major convenience. Currently Production Task deep links can only be used to give Authors quick access to an open Production Task.

SOLUTION: A new deep link will be created that will allow users with an Editor Role to be delivered to open Production Tasks.

%PROD_TASK_EDITOR_PUBLISHER_DEEP_LINK%

Production Task Deep Link – 15.0

Inserts a deep link in letters in the Production and Production Reminder letter families.

For users with either an Editor role or Publisher role.

For Submission Production Tasks – navigates to *Submission Tasks Assigned to Me* page.

For Schedule Group Production Tasks – navigates to *Schedule Group Tasks Assigned to Me* page.

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
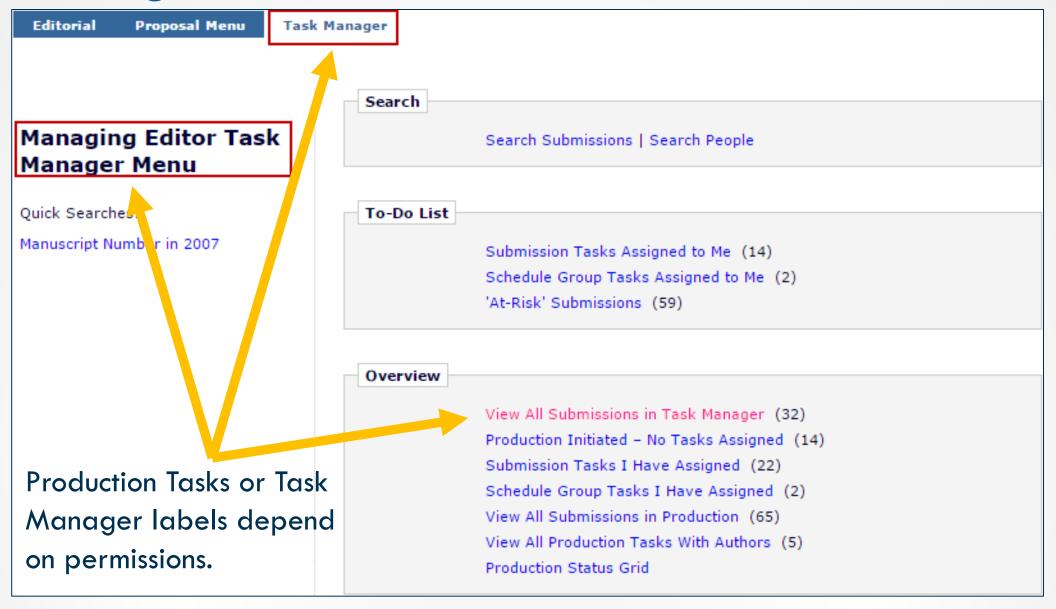- Conflict of interest deposit
- Preprint server deposit

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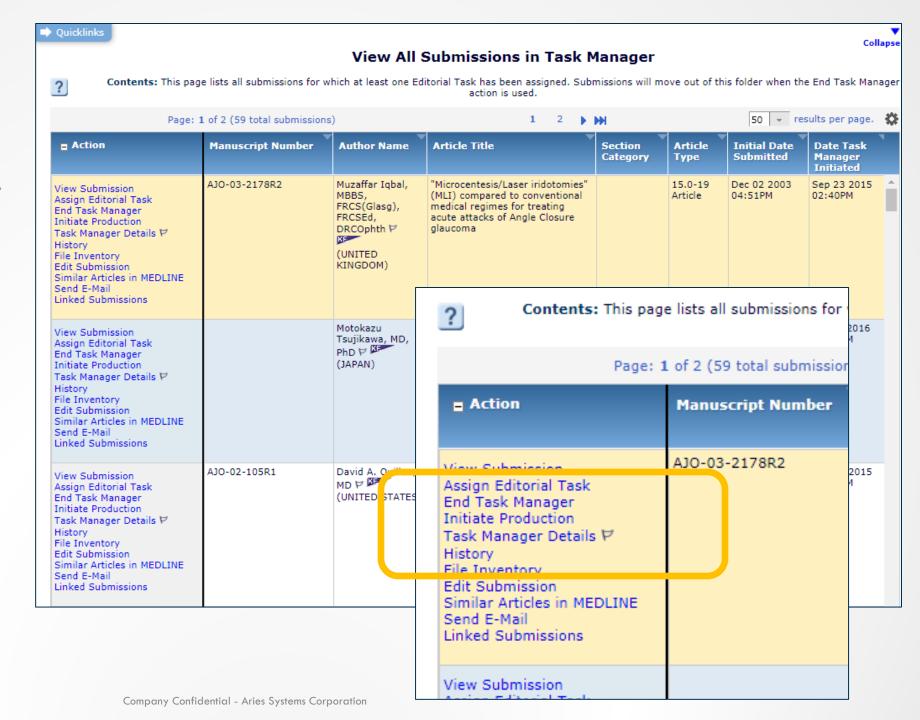
Administrator. This role has access to view all submissions both in Task Manager and Production, and is able to manually assign tasks in Task Manager and initiate production on submissions and assign tasks as needed.

Task Manager – 15.1

Production Tasks or Task Manager labels depend on permissions.

Task Manager

Folders where Task Manager tasks can be found:

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

Task Manager

When an Editor has the "Assign Editorial Tasks in Task Manager" permission, the "Assign Editorial Task" action link will display in relevant folders on the Editor main menu, but only for submissions where the Article Type has a Task Manager workflow selected.

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 ▲

Submission Item Parameters:

Production Tracking Parameters:

Use Task Manager Workflow:

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

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

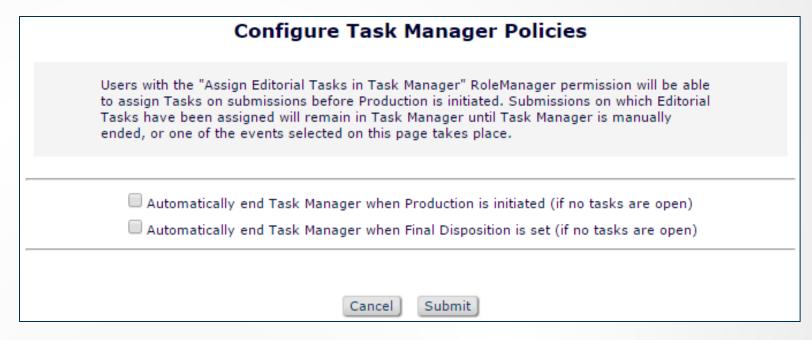| Production Task	Date Task Assigned	Date Task Due	Assigned To	Assigned By	Production Task Status	Date Task Closed	Closed By	Assigned Task Files
Task Manager Task (Assigned in Task Manager)	Nov 25 2017 0:58AM	Nov 29 2017 11:59PM	Louis B. Cantor, MD	Ed J Editor, MD	Completed	Nov 27 2017 11:52AM	Ed J Editor, MD	No Assigned Files
Data Task (Assigned in Task Manager)	Nov 5 2017 :43PM	Nov 7 2017 11:59PM	Joseph Caprioli, MD	Ed J Editor, MD	Completed	Nov 6 2017 11:52AM	Ed J Editor, MD	Assignment Files

Task Manager

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

Production Tasks   Top

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

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

Cancel   Save   Save and Close

Task Manager – Ending Task Manager

To complete an Editorial Task workflow:

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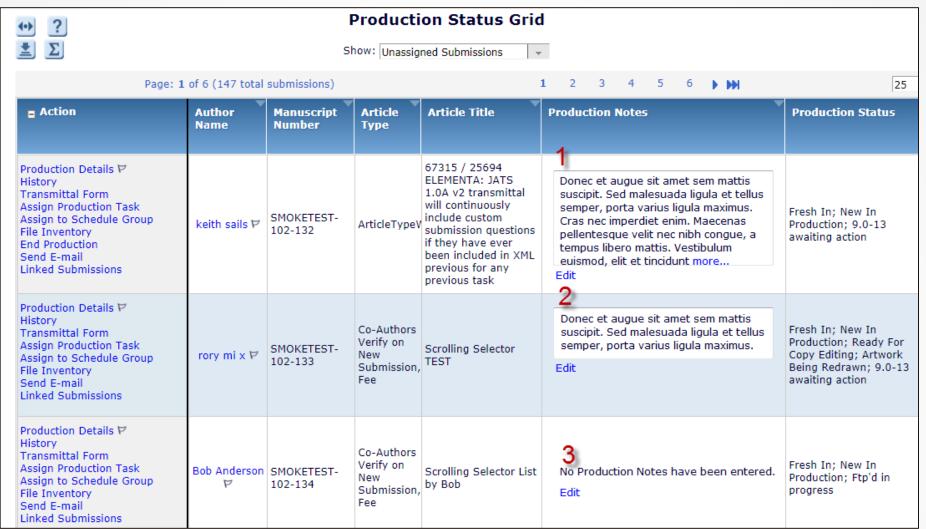- Set the Final Disposition*
- Initiate production*

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)

Cancel   Submit

*This setting will be overridden if any tasks assigned in Task Manager are still open when production is initiated.
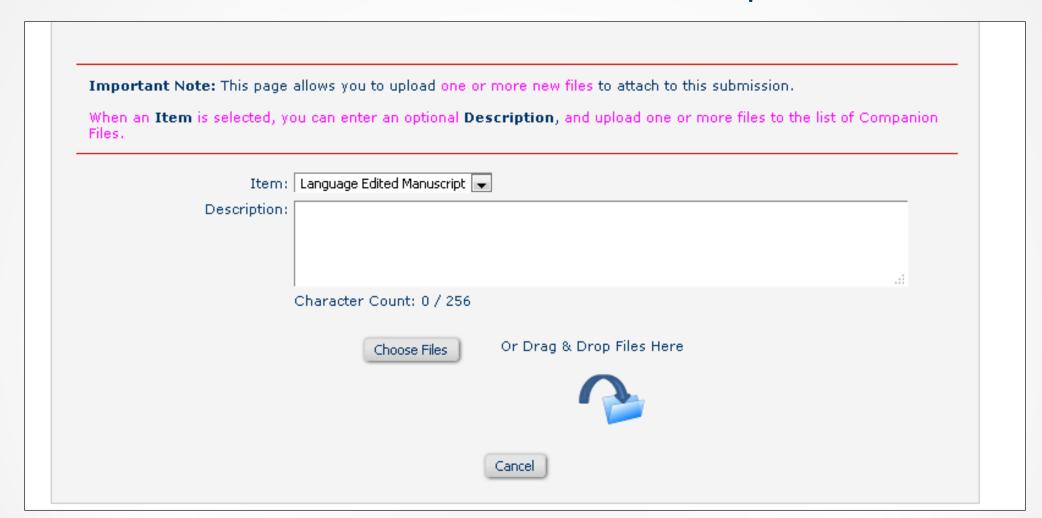
ProduXion Manager – 16.0

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

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.
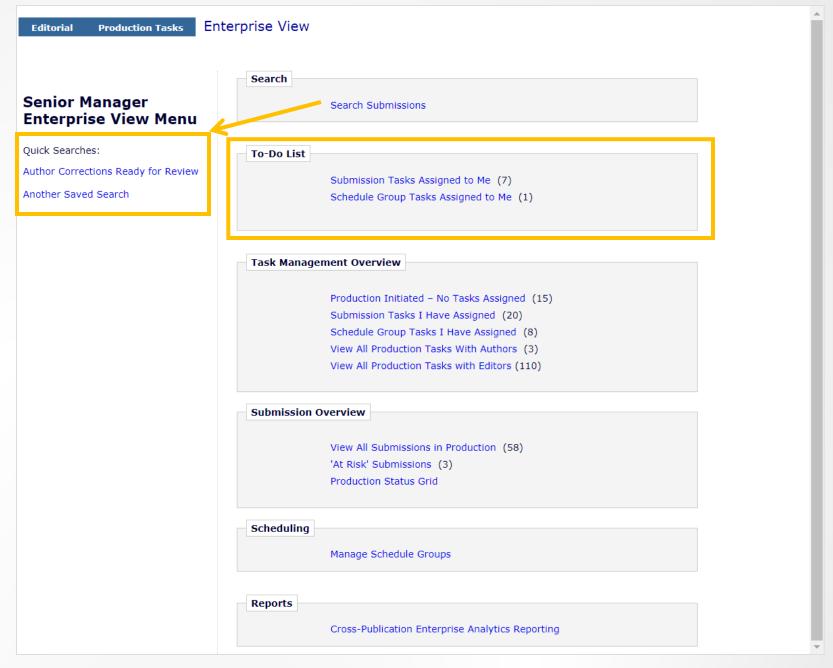
Production Tracking – Enterprise View – 16.1+

Production tracking in ProduXion Manager (PM) follows the Editorial Manager model of "one journal, one site." This means the Production Tasks menu provides searching and visibility to submissions and tasks on the single-journal level. However, many users involved in the production process work across publications, especially those managing the work.

SOLUTION: Provide a Cross-Publication Production Tasks menu that combines submissions and tasks from multiple PM sites, so that users can log in to one site to perform tasks assigned to them from any PM site, and/or to manage submissions in production across the PM sites.
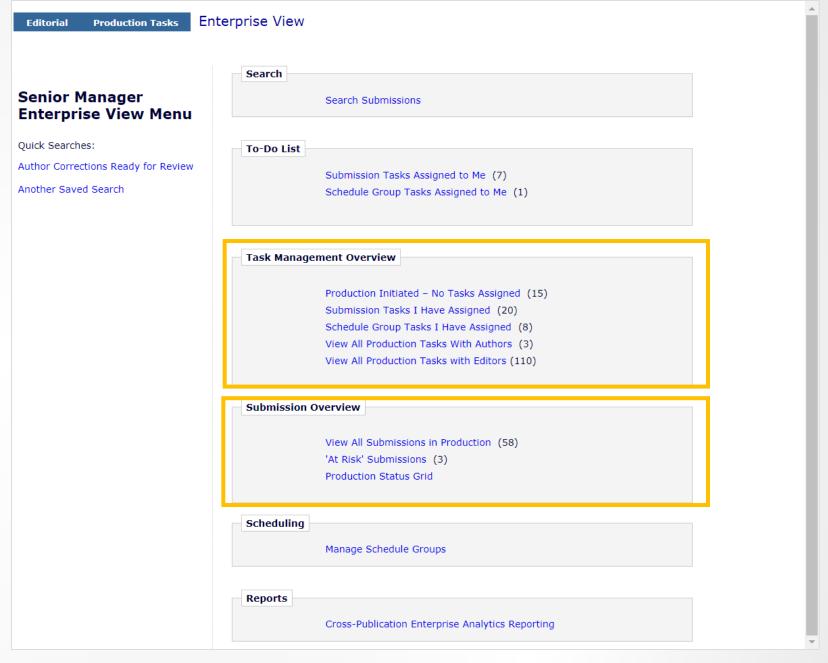
Enterprise View 16.1 +

- Contains links and folders that combine all pubs that a user can access

- Quick Searches are saved searches that can include results from across pubs

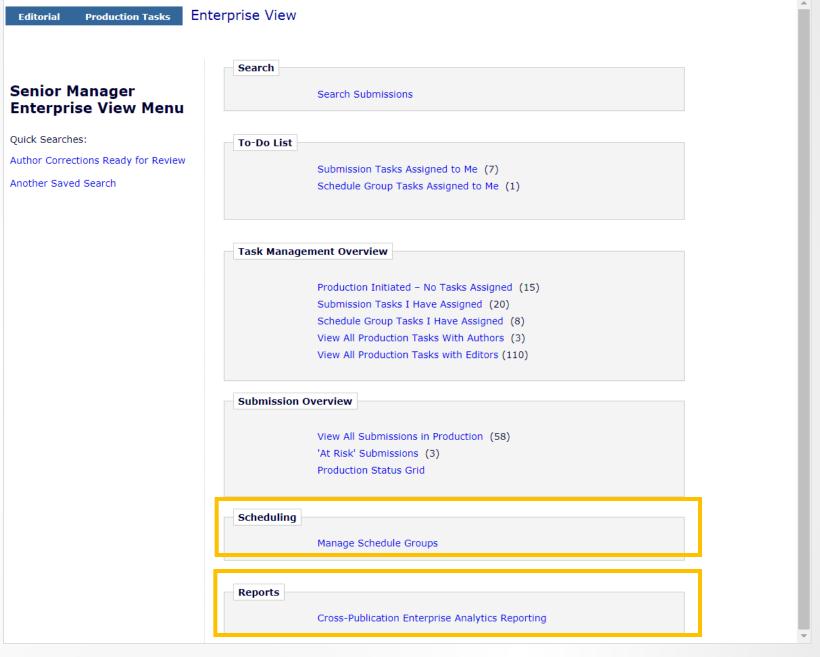- To Do List has all tasks assigned to logged-in user across all pubs

Enterprise View 16.1+

- Task Management Overview allows a "birds-eye" view of tasks and Editor workloads across pubs

- Submission Overview allows a "birds-eye" view of status of each submission across pubs

Editorial   Production Tasks   Enterprise View

Senior Manager Enterprise View Menu

Quick Searches:

Author Corrections Ready for Review

Another Saved Search

Search

Search Submissions

To-Do List

Submission Tasks Assigned to Me (7)
Schedule Group Tasks Assigned to Me (1)

Task Management Overview

Production Initiated – No Tasks Assigned (15)
Submission Tasks I Have Assigned (20)
Schedule Group Tasks I Have Assigned (8)
View All Production Tasks With Authors (3)
View All Production Tasks with Editors (110)

Submission Overview

View All Submissions in Production (58)
'At Risk' Submissions (3)
Production Status Grid

Scheduling

Manage Schedule Groups

Reports

Cross-Publication Enterprise Analytics Reporting

Enterprise View 16.1+

- Scheduling
  - Provides statistics about each issue, such as Current Number of Submissions, Page Budget and Image Counts
  - Allows drill-down into issue's TOC, access to files and correspondence
- Reports section allows access to reminder reports and all cross-publication reports

Editorial   Production Tasks   Enterprise View

Senior Manager Enterprise View Menu

Quick Searches:

Author Corrections Ready for Review

Another Saved Search

Search

Search Submissions

To-Do List

Submission Tasks Assigned to Me (7)
Schedule Group Tasks Assigned to Me (1)

Task Management Overview

Production Initiated – No Tasks Assigned (15)
Submission Tasks I Have Assigned (20)
Schedule Group Tasks I Have Assigned (8)
View All Production Tasks With Authors (3)
View All Production Tasks with Editors (110)

Submission Overview

View All Submissions in Production (58)
'At Risk' Submissions (3)
Production Status Grid

Scheduling

Manage Schedule Groups

Reports

Cross-Publication Enterprise Analytics Reporting

XML workflow, initiated through "tasks"

- Full manuscript conversion to JATS XML

- Editing of manuscript in WYSIWYG editor

- XML edited behind the scenes

- Auto-pagination, auto-redact/tooling, auto-composition, etc.

RESULT: Faster time-to-market, substantial cost reduction

LiXuid Manuscript™

Add Submission Production Task

Cancel   Submit

Insert Special Character

New Production Task Name: | XML Conversion Task

Maximum Production Task Name is 100

XML Tool Options

Production Task can be configure to interact with any of the XML Tools (e.
conversion, XML editing) available in the drop-down menu below. When a
with an XML Tool selected will trigger an interaction with the specific to th
tool can be selected per task.

Select XML Tool: | None ▼

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Becau
occurs automatically you must select a specific user to be identified as th

---

XML Tool Options

Production Task can be configure to interact with any of the XML Tools (e.g. XML conversion, XML editing) available in the drop-down menu below. When assigned a task with an XML Tool selected will trigger an interaction with the specific to the tool. Only one tool can be selected per task.

Select XML Tool: Full-Text XML Conversion ▼

☐ Automatically select 'Primary Manuscript File' for conversion
(This will prevent automatic selection by Item Type)

XML Tool 'Success' notification:
☐ Notify Task Assignor
☐ Notify Task Assignee
☐ Notify Corresponding Production Editor
Send notifications to the following email addresses:
(Multiple addresses must be separated by a semicolon)

XML Tool 'Error' notification:
☐ Notify Task Assignor
☐ Notify Task Assignee
☐ Notify Corresponding Production Editor
Send notifications to the following email addresses:
(Multiple addresses must be separated by a semicolon)

Select Item Type applied to Extracted Figures: Do not extract ▼

LiXuid Manuscript™

Submission Files

Item	Description	Item Family	File Name	Size	Last Modified	Select for Conversion
Cover Letter (REQUIRED FOR REVISIONS)	Cover Letter (REQUIRED FOR REVI...	Default	AJO Cover Letter.pdf	1 MB	Sep 17 2004 6:43PM	Cannot Convert
Contributions of Authors Form	* Contributions of Authors Form	Default	AJO Contribution of Authors & Sponsors.pdf	68.4 KB	Sep 28 2004 1:58PM	Cannot Convert
CONSORT Agreement (only if required)	CONSORT Agreement (only if requ...	Default	AJO Consort Statement.pdf	53.8 KB	Sep 28 2004 1:58PM	Cannot Convert
Abstract (MUST be submitted as a separate file)	Abstract (MUST be submitted as a separate file)	Default	041002 Safety Abstract Only.doc	20 KB	Oct 4 2004 6:56PM	○
Manuscript	* Manuscript (incl. title, auth, ...	Document	041002 SafetyManuscript_Final.doc	264.5 KB	Oct 4 2004 6:58PM	○
Disclosure	* Disclosure	Default	disclosure-2.doc	19 KB	Sep 27 2004 4:41PM	○
Other	Abstract (MUST be submitted as a separate file)	Supplemental	manuscript.txt	2 KB	Mar 8 2005 1:56PM	Cannot Convert
Other	* Table of Contents Statement (Original Articles only)	Supplemental	Intermediate.tab	19.5 KB	Mar 8 2005 3:12PM	Cannot Convert

Companion Files

Color Code	Item	Description	Item Family	File Name	Size	Last Modified	Uploaded By	Select for Conversion	Action
Change	Disclosure ▾		Default	invertedwaldo.png	51.5 KB	Apr 5 2017 4:27PM	Mike Di Natale, Managing Editor	Cannot Convert	Hide

Upload New Companion File

LiXuid Manuscript™

Batch Assign Production Task

Select the production task you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear. The table of selected submissions will confirm which submissions are valid for assignment under your choices.

Production Task: XML Conversion ▼

Task Assigned to: Nicki Cat/Typesetter ▼
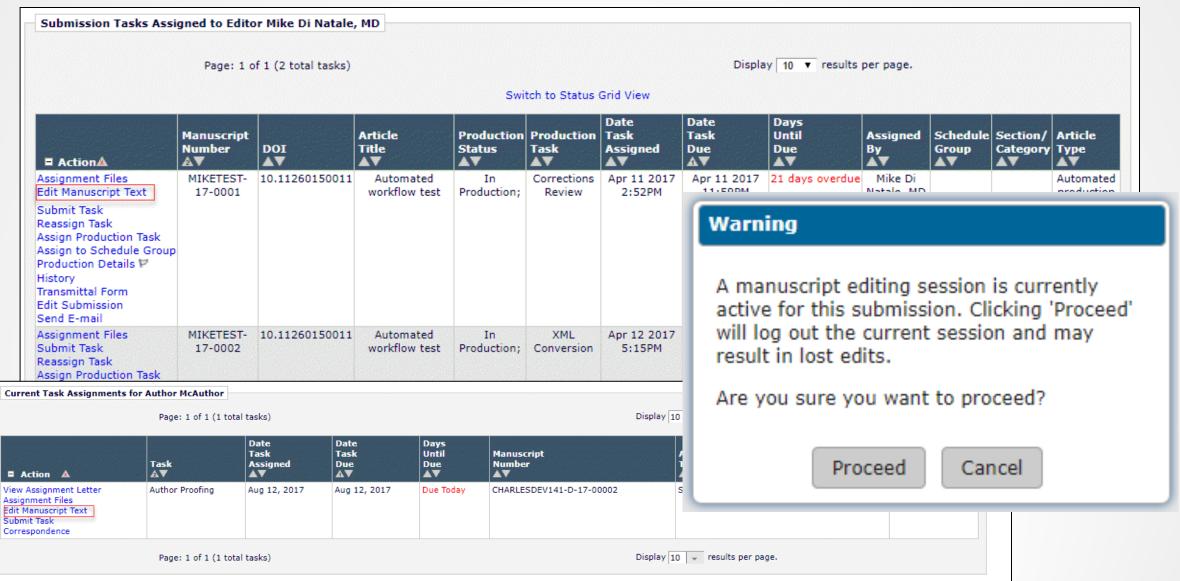
Submissions Selected for Assignment

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Section/Category	Production Status	Do Not Assign
History	DEMO-100-3	10.1371/journal.pntd.228	Alpha Romeo Alfalpha (UNITED STATES)	Boston Marathon 2012 Extreme Heat	JERS - Invitations for Proposal		In Production	☐
History	DEMO-100-75	10.1371/journal.pntd.213	Tony Alves (UNITED STATES)	Educational initiatives in southern Norway	Original Research	American Behaviour	In Production	☑ No eligible files present for conversion
History	DEMO112-D-14-00008	10.1371/journal.pntd.209	Mary François Smith (UNITED STATES)	XML Conversion Test submission	Original Research		In Production: Sent for Conversion	☑ Related XML task is active

Back   Cancel   Proceed with Selected Task

LiXuid Manuscript™

Submission Tasks Assigned to Editor Mike Di Natale, MD

Page: 1 of 1 (2 total tasks)   Display [10 ▼] results per page.

Switch to Status Grid View

☐ Action ▲	Manuscript Number ▲▼	DOI ▲▼	Article Title ▲▼	Production Status ▲▼	Production Task ▲▼	Date Task Assigned ▲▼	Date Task Due ▲▼	Days Until Due ▲▼	Assigned By ▲▼	Schedule Group ▲▼	Section/ Category ▲▼	Article Type ▲▼
Assignment Files Edit Manuscript Text Submit Task Reassign Task Assign Production Task Assign to Schedule Group Production Details ⚑ History Transmittal Form Edit Submission Send E-mail	MIKETEST-17-0001	10.11260150011	Automated workflow test	In Production;	Corrections Review	Apr 11 2017 2:52PM	Apr 11 2017 11:59PM	21 days overdue	Mike Di Natale, MD			Automated production
Assignment Files Submit Task Reassign Task Assign Production Task	MIKETEST-17-0002	10.11260150011	Automated workflow test	In Production;	XML Conversion	Apr 12 2017 5:15PM						

Current Task Assignments for Author McAuthor

Page: 1 of 1 (1 total tasks)   Display 10

☐ Action ▲	Task ▲▼	Date Task Assigned ▲▼	Date Task Due ▲▼	Days Until Due ▲▼	Manuscript Number ▲▼	
View Assignment Letter Assignment Files Edit Manuscript Text Submit Task Correspondence	Author Proofing	Aug 12, 2017	Aug 12, 2017	Due Today	CHARLESDEV141-D-17-00002	

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

Warning

A manuscript editing session is currently active for this submission. Clicking 'Proceed' will log out the current session and may result in lost edits.

Are you sure you want to proceed?

[Proceed]   [Cancel]

Workflow challenges and solutions

What isn't working and how can we make it work?

PM Reporting Overview

Contents

- How to use Enterprise Analytics Reporting (EAR)

- Useful Tables and Views

- Results

- Tips & Tricks

- Default EAR PM Reports

- Reminders, Downloads and Searches

How to use EAR

- Most flexible built-in custom reporting option – can edit existing report or build from scratch
- Access to individual tables – can link these together as needed
- Also has Views (pre-built combinations of tables)
  - Cross-Publication EAR is limited to Views (no linking)
- Can select individual fields, carry out calculations
- Can group, sort, summarize, pivot, color-code the results
- Can distribute by email – either on the fly or scheduled

Recent & Upcoming Enhancements

- Can use SFTP for a scheduled report, and include PDF, Excel, or CSV file of the results

- Max number of scheduled deliveries expanded to 500

- Version 15.1:

  - Can SFTP on the fly

  - XML results files available for ad-hoc email, scheduled email, and scheduled SFTP (in addition to Excel and PDF)

  - CSV results file available for ad-hoc email, ad-hoc SFTP and scheduled email (already available for scheduled SFTP)

Online training videos (www.ariessys.com)

How to Use EAR - Report View toolbar

- Displayed when **running (viewing)** reports.
- Allows Adding or Hiding Filters, Adding and Deleting fields, and updating results.
- Note: Changes are **not saved**. To save changes, go into 'Design' mode (edit).
- Allows emailing and scheduling of **saved** report (does not include changes made on this page).
- Export Options available (e.g. Excel, Word). RTF to be removed.
- Hover-over text gives an explanation.

How to use EAR - Report Design Toolbar

- Displayed when **creating or editing** reports.

- Choosing Data Sources (one or more tables or views) is a required first step.

- Can build Detailed and Summary reports to appear on the same results page.

- Can add Chart (graph), Gauge (specialized chart), Filter and Preview.

- Misc tab – Sharing options

- Style tab – Order and appearance for the parts of the report.

- Some tabs grayed out until Data Sources/Fields have been selected.

- Email and Scheduling (calendar) icons available once report has been saved.

How to use EAR - Choosing Data Sources

■ Pick a View or Table - required first step. Can link together.

How to use EAR - Fields Tab

- All Fields shown from selected Data Source or Sources.
- Hovering on truncated descriptions shows full text.
- Adds data to "Detail" report.

How to use EAR - Summary Tab

- Shows all the fields available from the selected Data Source(s).
- Selecting a field here puts it on the Summary Report.
- Can also use Functions, Formats, Arithmetic, Subtotals and Advanced Field Settings.

How to use EAR - Charts and Gauges

- Selection of type of Chart (graph).
- Once selected, other options relevant to that type of Chart are displayed.
- Gauges tab allows inclusion of different graphical representation of data.

How to use EAR - Misc Tab – Sharing Reports

- Misc tab allows you to add a title, description and header and footer for your report, and set a Drill-Down key when using this report as a subreport.
- Set sharing rights for your reports.
  - None – Not shared.
  - Full Access – Others can run, edit, "save as" and save over your report.
  - Read Only – Others can run, edit and save their own version.
  - View Only – Others can run (and change filters if set.)

How to use EAR – Style Tab - Styling Your Report

- Style tab allows color selection and styling options.
- Set order of appearance for the parts of your report.
- Options will also apply to PDF of report.

How to use EAR – Filters Tab – Refining your Report

- Allows filtering of results by any field from the data source(s). Multiple filters can be used
- To have the filter appear on the results page so that others can use it when running the report, select the 'Param' checkbox.
- Can also add logic for filters (e.g. 1 OR 2). Must remove the "Ex:" [example] text to actually use the filter.

How to use EAR – Scheduling and Emailing
EM Versions 14.1 & 15.0

- EM Version 14.1 & up – SFTP available for Scheduled reports, includes option for CSV file

New Delivery Schedule for this report

Schedule Description:	Insert Special Character _Maximum 200 characters_
Delivery Frequency:	Weekly ▾
First Delivery Date:	Date 06/00/2010 📅 (mm/dd/yyyy)
Additional Deliveries:	End after: 500 ▾ total deliveries
Delivery Method:	○ Email ◉ SFTP
SFTP Options:	SFTP Server Address (e.g. reports.customer.net): [ ] Username [ ] Password [ ] Subdirectory: [ ] Email Address (for transmittal notification): [ ] ☐ Include PDF of report ☐ Include Excel file of report ☐ Include CSV file of report

Save Delivery Schedule

- Email option – can include a PDF or Excel file of the results as an attachment.
- Can include a deep link to the results (run live when the link is clicked).
- New "SFTP" option. Can include a PDF, Excel file or CSV file of the results.
- Number of max deliveries expanded to "500".

How to use EAR – Scheduling and Emailing

- Ad-hoc SFTP Option – Version 15.1 – available 'on the fly' for all reports (not just scheduled reports)

How to use EAR – Scheduling and Emailing Version 15.1

- Attach CSV Results – Extended to ad-hoc SFTP (already available for scheduled SFTP), ad-hoc email and scheduled email.
- Attach XML Results – allowed for SFTP, ad-hoc email and scheduled email

Useful Views and Tables

Help is available!

Production-Related Reporting Views (Submissions)

Submission Production View

- Basic submission and Corresponding Author metadata
- Key editorial and production dates and information
- Some Schedule Group and TOC information
- Returns one row per submission

Submission Production Tasks View

- Information on submission production tasks
- Returns one row per submission production task (may return multiple rows per submission)

Production Task Questionnaire View

- Production Task Questionnaire questions and responses
- Returns multiple rows per submission

Production-Related Reporting Views (Schedule Groups)

Schedule Groups View

- Overview of the current status of the publication's Schedule Groups.
- Organized by Schedule Group, with one row for each
- In addition to standard Schedule Group data (ID, Description, etc.), calculated totals such as the current number of submissions or current color image counts are also available.

Schedule Group Production Tasks View

- Information on Schedule Group production tasks
- Returns one row per Schedule Group production task (may return multiple rows per Schedule Group)

Schedule Group Table of Contents and Headers View

- Information about the Schedule Group Table of Contents, including headers

Production-Related Tables

- Submission Production Task Assignments Table
- Submission Production Tasks Table
- Schedule Groups Production Task Assignments Table
- Schedule Group Production Tasks

- Schedule Group TOC
- Schedule Group TOC Headers
- Schedule Groups

Useful Additional Tables – Document Table, People Table

What Really Matters....Results!

Results – Preview tab (or button)

- Allows you to 'try out' the fields/filters/charts/styles etc. before saving.

Simple report results: Excel-like table

Manuscript Number	Article Type	Submission Production Task Name	Days to Complete
AJPH-201823757	Editorial	Tooling	1
AJPH-201823757	Editorial	Triage	
AJPH-201015	Research Article	Copyediting	10
AJPH-201015	Research Article	Artwork Composition	0
AJPH-201015	Research Article	Author Review of Draft-Edit	25
AJPH-201015	Research Article	Tooling	6
AJPH-201015	Research Article	Triage	10
AJPH-201015	Research Article	Proofreading	3
AJPH-201015	Research Article	1st Proof Composition	1
AJPH-201015	Research Article	Editorial Review - Draft	4
AJPH-201015	Research Article	Author Review of 1st Proofs	4
AJPH-201015	Research Article	2nd Proof Composition	1
AJPH-201015	Research Article	Author Review of 2nd Proofs	1
AJPH-201015	Research Article	Author Final Revision	12
AJPH-201015	Research Article	Copyedit Finalization	0
AJPH-201015	Research Article	3rd Proof Composition	3
AJPH-201015	Research Article	Paper Ready for Final Composition	0
AJPH-201015	Research Article	Highwire PAP	0
AJPH-20106	Research Article	Copyediting	8
AJPH-20106	Research Article	Artwork Composition	0
AJPH-20106	Research Article	Author Review of Draft-Edit	8
AJPH-20106	Research Article	Tooling	1
AJPH-20106	Research Article	Tooling	3
AJPH-20106	Research Article	Triage	

Results can be so much more!

Tips & Tricks

- Converting a value to a percentage
- Averages
- Subtotal Types
- Value Ranges
- Cell/Text Highlighting
- Advanced Filtering

Converting a Value to a %

- Results wanted: Number and % of Submission Production Tasks assigned.
- Data Source – Submission Production Task View
- For the Number (Count), set Function to 'Count' and Format to "0,000".
- For the %, Set Function to 'Count' and set format to "% of Group (with rounding)".

Results – Count and %

Submission Production Task Name	Count of Tasks	% of Total
Author Final Revision	44	21.2%
Author Review of 1st Proofs	1	0.5%
Copyedit Finalization	20	9.6%
Copyediting	39	18.8%
Tooling	58	27.9%
Triage	46	22.1%
	208	100%

Averages

- Results wanted: Average Days to complete submission production task per Article Type
- Data Source: Submission Production Task View
- Use 'Average' function for 'Days between Submission Production Task Assignment and Task Completion'. (Days to complete is an available pre-calculated field).

Results

- Visually grouped by Submission Production Task Name.
- Averages used for values.

1st Proof Composition

Article Type▲	Average Days to Complete
*Editor's Choice - Editor Only	1
Analytic Essay	3
Book Review	2
Public Health Practice	4
Research Article	3

2nd Proof Composition

Article Type▲	Average Days to Complete
*Editor's Choice - Editor Only	1
Analytic Essay	2
Book Review	1
Public Health Practice	3
Public Health Then and Now	2
Public Health Then and Now - Editor	3
Research Article	2

3rd Proof Composition

Article Type▲	Average Days to Complete
Research Article	1

Advanced Field Settings Are Your Friends!

- Subtotal Types
- Value Ranges
- Z-to-A Sorting
- Cell Highlighting
- Text Highlighting

Advanced Settings - Subtotal Types

- First, select 'Add Subtotals' checkbox.

Advanced Settings - Subtotal Types

Hide this field	☐
Sort (z-a)	☐
Italic	☐
Bold	☐
Width	
Label Justification	Ⓜ
Value Justification	☐
Subreport	...
Drill-Down Style	...
Url	example:Page.aspx?id={0}&value={1}
Subtotal Function	(Default)

(Default)
(None)
Average
Count
Count Distinct
Maximum
Minimum
Sum
Sum Distinct

Gradient Cells Shading

Text Highlight

Cell Highlight

Value Ranges

- Then, click the 'gear icon for the field that requires a subtotal and set the Subtotal Function in the 'Advanced Field Settings' popup. Can also be used to remove a subtotal you don't want.

Advanced Settings - Cell highlighting

- Highlight Average Days to complete (5 or greater) in red.

Advanced Settings – Cell Highlight

Advanced Settings - Text Highlighting

1st Proof Composition

Article Type▲	Average Days to Complete
*Editor's Choice - Editor Only	1
Analytic Essay	3
Analytic Essay - Editor	3
Book Review	2
Brief	3
Commentary	7
Editorial	4
Editorial - Editor	7
Editorial - Invitation	5
Editor's Choice	6
Letter Response	1
Letter Response Invitation	5

Advanced Settings – Text Highlighting

Hide this field	☐
Sort (z-a)	☐
Italic	☐
Bold	☐
Width	
Label Justification	☑
Value Justification	☐
Subreport	... ▼
Drill-Down Style	... ▼
Url	
Subtotal Function	(Default) ▼
Gradient Cells Shading	☐
Text Highlight	Commentary: Red
Cell Highlight	
Value Ranges	

OK

Advanced Settings - Value Ranges (Custom values)

MS Number	Received	First Decision	Final Decision	Final Disposition	Rec. - 1st Dec.	R
	4/27/2012		4/27/2012			
	5/25/2012		5/25/2012			
	5/25/2012		5/25/2012			
DEMOMC-D-11-00006	5/17/2011	5/3/2012	5/3/2012	5/3/2012	2 months+	
msc pmug	12/11/2012		12/11/2012			
MSC test 21	5/17/2012	5/24/2012	5/24/2012	5/24/2012	Under a month	
MSC test 38	8/9/2012		8/9/2012			
MSC test 39	7/31/2012	8/14/2012	11/29/2012	12/11/2012	Under a month	
MSC test11	5/12/2011	1/19/2012	1/19/2012	1/19/2012	2 months+	
MSC test12	2/3/2012	3/13/2012	4/27/2012	4/27/2012	1-2 months	
MSC test13	3/14/2012		3/14/2012			
MSC test14	3/14/2012		3/14/2012			
MSC test6	11/18/2011	5/17/2012	5/24/2012	5/24/2012	2 months+	
MSC test7	11/18/2011	2/7/2012	4/27/2012	4/27/2012	2 months+	

Advanced Settings – Value Ranges

Default EAR PM Reports

Single Journal EAR

- As with all standard EAR reports, they can be resaved and modified as needed

📂 **Production Tracking Reports**

Avg Days to Complete Production Tasks in selected timeframe

Submission Turnaround Times – Editorial and Production
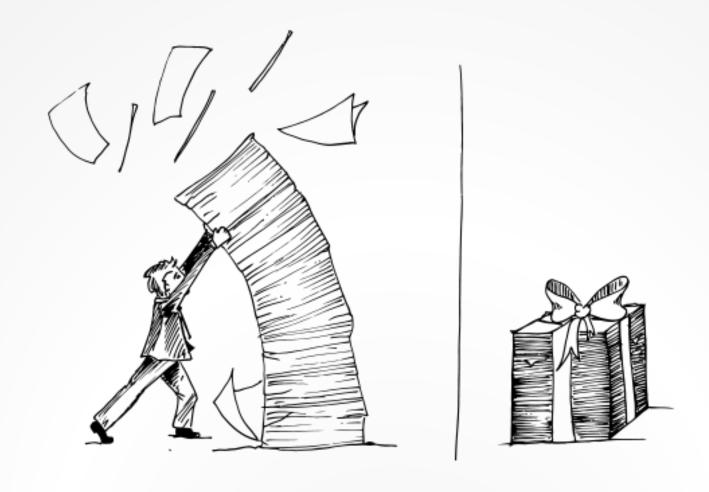
Submission Turnaround Times – Production

Cross-Publication EAR

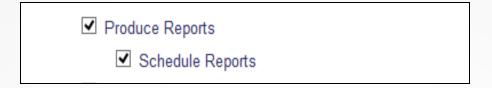- As with all standard Cross-Pub EAR reports, they can be resaved and modified as needed

📁 **Cross-Publication Production Tracking Reports**

Avg Days to Complete Production Tasks in selected Timeframe

Number of Submissions per Open Schedule Group

Reminders, Searches and Downloads

RoleManager Permissions

Production-Related Reminder Reports

- Easily send reminders for outstanding tasks (overdue or not)

- Filter by task, Schedule Group, Recipient Role, due date, Online Publication date, Article Type and Section/Category

Reports

Submission Tasks Reminder Report

Schedule Group Tasks Reminder Report

Automated Submission Tasks Reminder Report

Automated Schedule Group Tasks Reminder Report

Production-Related Workload Report

- Summary totals of Submission Production Tasks assigned or completed in the specified time period.
- Broken down by person assigned, Article Type.
- Can be filtered by Editor Role, Publisher Role, Submission Production Task Type, Section/Category.
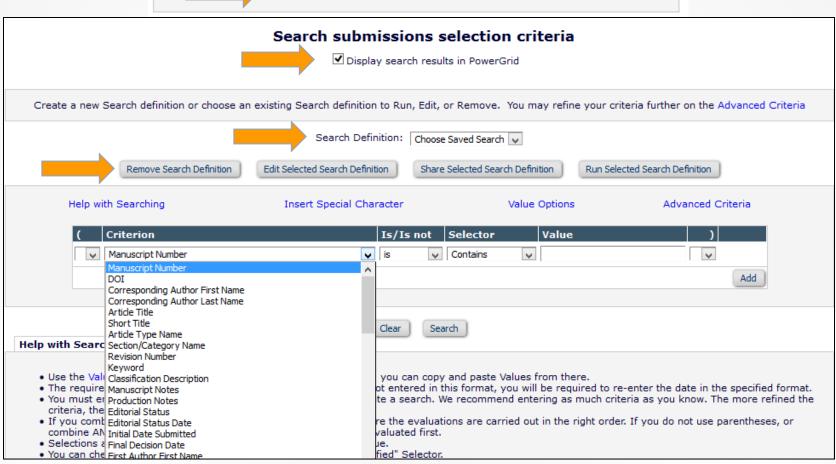- Results can be downloaded.

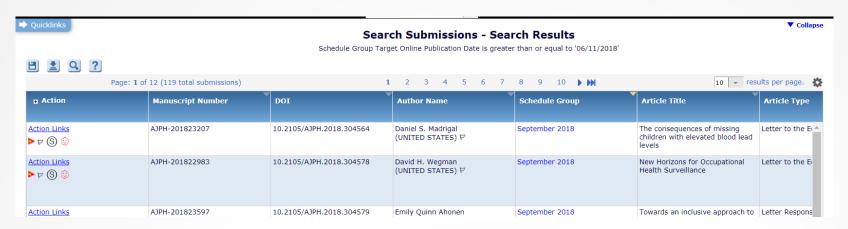Editor/Publisher Assignment Totals by Task Type Report

Searches
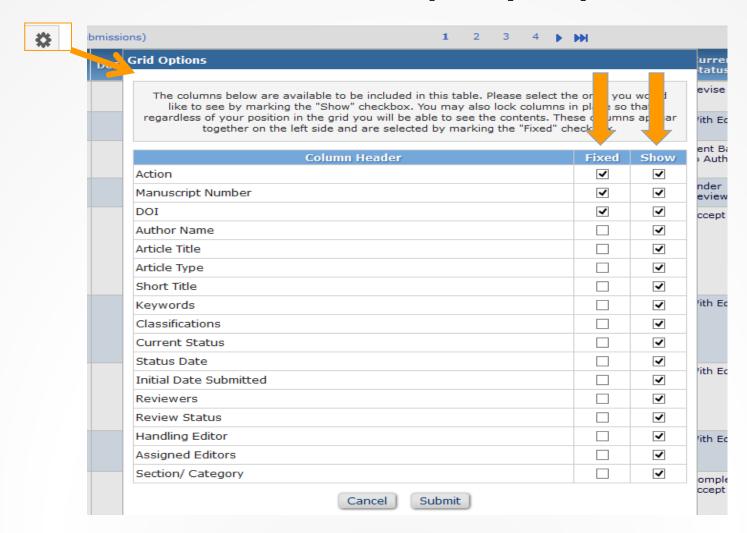
Search Submissions

Search Results

- Schedule Group Target Online Publication Date is greater than or equal to '06/11/2018'

- Save Search
- Download
- Search Again
- Help Video

Search Results – Display options

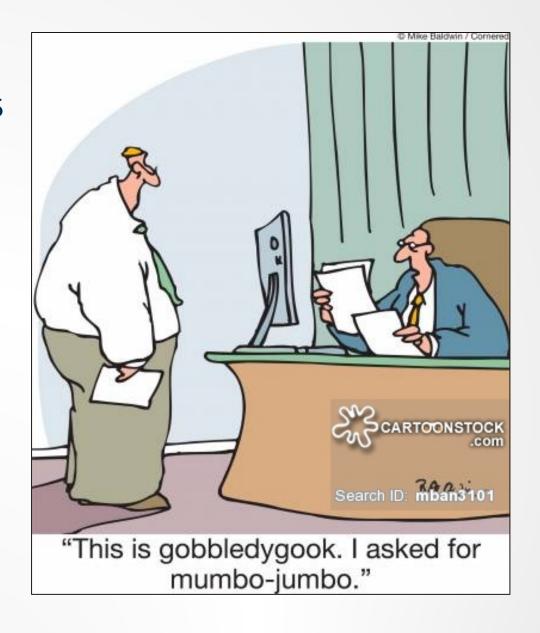# Reporting Fun!!!
Throw your random report queries at our crack team of reporting geniuses

Questions?

Thank you!