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Preprint Manager Release Notification

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Preprint Manager: Production Tasks

Production Tasks Overview	4
Extended Publisher Roles	4
Production task assignments:	4
Workflow and Scheduling	5
“Volume and Issue” structure (Schedule Groups)	5
File management	6
How is Production Tracking used?	6
Configuration overview	6
Suppressing the Author Submission Interface	8
Defining Identifiers to Display	8
Defining Color Codes	10
Defining Companion Files	11
Production Tasks	12
General Options	15
Assignment Options	16
Companion File Options	17
Scheduling and Due Date Options	18
Letter Options	19
Scheduling	19
Production Status Terms	20
Editorial Manager Pages modified by Production Tasks	21
Details	21
History	21
File Inventory	23
Publish Information	24
Transmittal Form	25
Author Main Menu	26
Production Tasks Menu	27
Setting Production Task menu as default	28
Production Tasks Assigned to Me	29
Production Tasks I have Assigned	30
View All Submissions in Production	31
View All Production Tasks with Authors	32
Production Status Grid	32
Manage Schedule Groups	33
Add Schedule Group	34
Closed Schedule Groups	35
View All Submissions with Production Completed	35
Production Tasks Reminder Report	36
Search Submissions/Search People	38
New Viewing and Editing permissions	40
New Action Links	42
Assign Production Task (Initiate Production)	43
End Production	45

Return to Production	46
Add Schedule Group.....	47
Edit Group Details	48
Add Submission.....	49
Remove From Group	50
Close Group	51
Assign Production Task/Assign Another Production Task	51
Assign Follow-On Task	54
Cancel Assignment	55
View Assignment Letter	55
View instructions (authors only).....	56
Assignment Files.....	56
Submit Task	57
Production Details.....	59
History	60
Transmittal Form	61
File Inventory.....	61
Zip file download.....	62
Production Status Grid.....	62
Corresponding Production Editor.....	63
Mail-merge Fields for Production Tracking	65
Useful 5.0 Features.....	66
Customized Flags.....	67
Additional Manuscript Details.....	67
Example: Configuring a Copy-Editing stage before Transmittal	68
Configuration	68
Use	69

Production Tasks Overview

This 5.0 release of Editorial Manager and Preprint Manager introduces a set of features that allows journals to manage journal activities that are not directly related to peer-review. For most journals these will be “production”-related activities such as typesetting or proof reading. However, *any* activity outside the main peer-review workflow could be managed using a “production” task.

For example, journals that carry out copy-editing prior to acceptance and release to their publisher could use a Production Task to manage the assignment of the submission to a freelance copy-editor, who can then pick up and return files through the system before transmittal to the publisher. Journals that control their own preparation for publication can extend this to the entire post-acceptance workflow, assigning and tracking all stages through to publication.

Production Tasks are part of the Pre-Print Manager system and are not automatically available to all Editorial Manager users. You will need to contact your Editorial Manager representative to make these features available.

Extended Publisher Roles

New Publisher and Editor permissions have been added to control who can view Production Task-related information. The Publisher roles, in particular, have been given many more permissions in anticipation of their greater use in journals configured to carry out Production Tracking.

You can use Publisher roles for people who have no need to interact with the Peer-Review process; otherwise Editor Roles can be used for people who work on both. You’ll need to have at least one normal Editor Role configured to Initiate Production, as this is done from the main Editorial Menu.

Production task assignments:

These are central to setting up a production workflow, and you can track any process you carry out as a Production Task. A production task is similar to a reviewer or editor assignment, and it:

- Allows you to assign a submission to a person to work on; they usually describe processes like “Copy-editing”, “Typesetting” and “Proof-Checking”.
- Allows you to set (and will automatically calculate) due dates for each process; they can be linked to target publication dates.
- Allows you to control who can carry out each task.
- Allows you to make selected files available as part of the assignment.

- Allows the recipient to upload new files through the Editorial Manager/PM system.
- Automatically records the dates for each activity.

A production task is a simple assignment; there are no options to invite a person, although production tasks can be cancelled easily once assigned.

Follow-on Assignments: Some tasks can be configured to allow “Follow-On” assignments. When a recipient closes such a task, they are given the option of immediately assigning another task. This allows you to ask a third-party to assign work using the system, or to “daisy-chain” tasks together.

Workflow and Scheduling

PM provides a spreadsheet-like Status Grid view of key tasks, so you can track the progress of submissions through the workflow.

Individual tasks can be given a target duration, and their due date can also be linked to publication dates.

Target Publication Dates: each submission can have up to three target publication dates:

- A submission-specific target online publication date; this is independent of any issue/schedule group target publication dates, and can be used to bring an important submission forward ahead of the rest of its schedule group.
- A target online publication date from an associated schedule group; this is the target online date for all submissions in the group.
- A target publication date for the schedule group, normally the print publication date. This is to define a target date for all submissions in the group.

Using these three dates, you can set a target date for printing an issue, set an earlier target date for putting all submissions in the issue online, and if necessary give individual submissions an even earlier target online date, for example to meet a conference date or to ensure the earliest possible publication date.

“Volume and Issue” structure (Schedule Groups)

Submissions can be assigned to Schedule Groups (normally individual Issues) to:

- Define key publication dates.
- Define running order/Tables of Contents.
- Maintain targets for content (number of pages, figures, etc.).

A submission can belong to only one schedule group at a time, but can be moved freely between groups.

File management

Production Tasks allow you to assign specific files to people as part of the task assignments. When each person completes their assignments, they can upload files as part of the submission process.

Companion Files: Files associated with Production Tasks are designated Companion files and don't appear in the main submission PDF.

Color Coding: You can use special color-codes to manage your companion files; assigning a default color code allows you to immediately assign companion files to a specific group. Or, you can use color-coding to indicate progress (e.g. change a file's color from Red, through Yellow to Green as you process it).

Hiding: You can Hide old companion files as they are replaced with new ones, allowing you to maintain a current set of live files and simplifying your file management.

How is Production Tracking used?

Assignments are made for individual submissions, with schedule groups being used to manage groups of submissions for scheduling purposes. Typically, you will:

Initiate production on individual submissions at any time, even before decision or final disposition if you wish.

Use the Production Status Grid to review the progress of submissions through the production process.

Set up Schedule Groups for specific issues, or for other scheduled deliverables, such as conference proceedings or a monthly web site update.

Set individual online Target Publication Dates for a submission, or assign a submission to a Schedule Group to inherit target dates from the group.

Assign Production Tasks to process the submission, selecting files for the recipient to work on.

People you assign tasks to will receive notifications, download assignment files from Preprint Manager, and when complete, submit their tasks, uploading any new files as they do so.

Use the Production Status Report to chase up outstanding tasks.

Move completed submissions out of production, either individually or by closing the schedule group.

Configuration overview

- 1) Ask your Editorial Manager/Preprint Manager representative to enable Production Tasks for your journal.

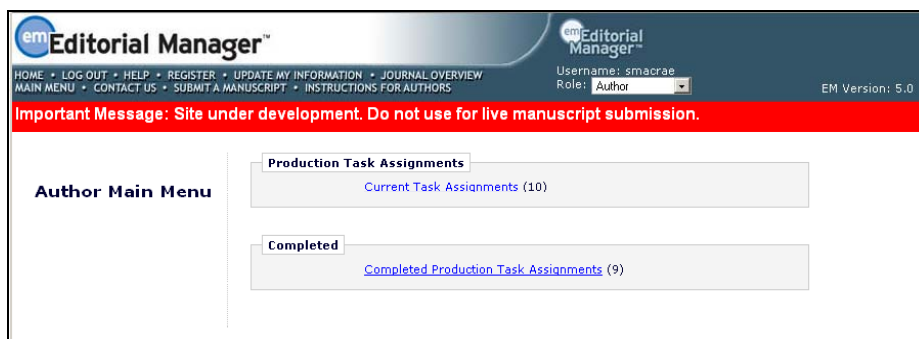
- 2) Configure the relevant editor and publisher roles in RoleManager, adding new roles for your production staff and external suppliers or freelances. Identify:
 - Who can see Production Task-related information.
 - Who is eligible to assign and receive Production Tasks.
 - Which roles will default to using the Production Task menu.
- 3) Decide whether to suppress the normal author submission interface; only applicable to journals that do not use Editorial Manager for peer-review tracking.
- 4) Select the identifiers to be displayed in Production Tracking columns, selecting from MS Number (carried over from Editorial Manager), DOI, Corresponding Author name and Article Title.
- 5) Define file policies:
 - Define Color Codes for companion files.
 - Create companion file Submission Item Types in PolicyManager, assigning default color codes if required.
- 6) Create letters for each production task, and production task reminder letters. For each task you may need:
 - An Assignment letter to the person carrying out the task, on initial assignment
 - A Cancellation letter to the person carrying out the task assignment.
 - A Submit Task letter to the journal, sent on completion of the task assignment.
- 7) Define Production Tasks for each stage in your workflow, setting:
 - Assignment policies (who can assign and receive the task; if follow-on tasks are allowed).
 - Scheduling policies (does the task appear in the Status Grid, task duration and lead times before publication).
 - Upload policies (what types of file can be uploaded).
 - Letters sent (on assignment, cancellation and completion).
- 8) Add initial schedule groups (volumes and issues) to the system before transferring submissions to production

Detailed Feature List and Configuration

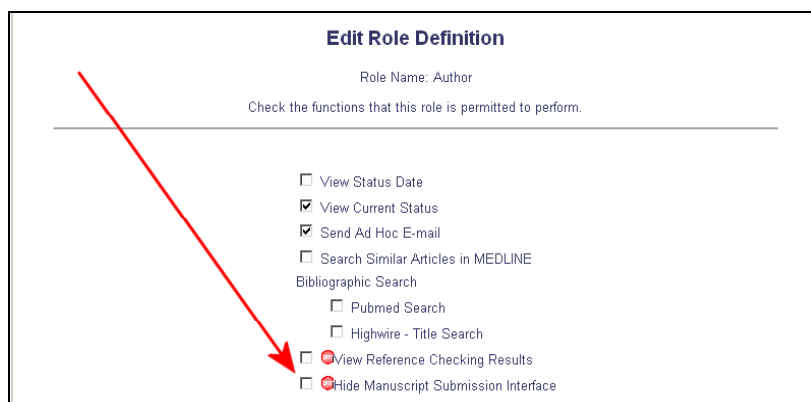
Suppressing the Author Submission Interface

Existing Editorial Manager users are not likely to require this option; it is only necessary where a journal is using only the Production Tracking features in Preprint Manager, and wishes to log submissions centrally without authors creating and submitting unsolicited manuscripts.

With this option set, all folders related to the normal Editorial Manager peer-review management are removed, leaving only the “Current Task Assignments” and “Completed Production Task Assignments” folders available to authors.



TO CONFIGURE: Go to RoleManager, and edit the Author role. Set the “Hide Manuscript Submission Interface” permission.



Defining Identifiers to Display

Preprint Manager allows you to simplify some of the Production Tracking pages that list submissions by selecting the main identifiers to use to identify the submission information. You can select from:

- Manuscript Number (carried over from Editorial Manager)

- DOI
- Article Title
- Corresponding Author Name

Note that the corresponding Author Name will display with the author's country in brackets, to allow you to add extra time for Production Tasks assigned to them if necessary.

View All Submissions in Production

Contents: This page lists all submissions where at least one production task has been assigned, or the submission has been assigned to a Schedule Group. Submissions will move out of this folder when the End Production action is used, or if they are associated with a Schedule Group when that group is closed.

Page: 1 of 1 (26 total submissions) Display 100 results per page.

Action	Manuscript Number	Author Name	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
Assign Production Task Production Status Grid Production Details History Transmittal Form File Inventory Edit Submission	JXYZ57	John MacJohn (UNITED KINGDOM)	4(3) - Sep 2007	News and Views	Production Test	May 22, 2006	May 22, 2006	Aug 14, 2007

View All Submissions in Production

Contents: This page lists all submissions where at least one production task has been assigned, or the submission has been assigned to a Schedule of this folder when the End Production action is used, or if they are associated with a Schedule Group when that group is closed.

Page: 1 of 1 (26 total submissions) Display 100 results per page.

Action	Manuscript Number	DOI	Author Name	Article Title	Schedule Group	Section/Category	Article Type	Initial Date Submitted
Assign Production Task Production Status Grid Production Details History Transmittal Form File Inventory Edit Submission	JXYZ57	10.123/JXYZ-nv-57	John MacJohn (UNITED KINGDOM)	Submitting to a Journal; an assessment of the major on-line submission systems.	4(3) - Sep 2007	News and Views	Production Test	May 2006

TO CONFIGURE: Use PolicyManager, Configure Identifiers Displayed in Production Tracking. Tick/check the selection boxes by the identifiers you wish to display in Production Tracking pages.

PolicyManager Main Menu

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

- Registration and Login Policies
- Status Policies
- Submission Policies
- Additional Data Policies
- Editor Assignment Policies
- Reviewer and Editor Form Policies
- E-mail and Letter Policies
- General Policies
- Conference Submission Policies
- Transmittal Policies
- Preprint Manager
 - [Configure Artwork Quality Checking](#)
 - [Configure Production Tasks](#)
 - [Configure Identifiers Displayed in Production Tracking](#)
 - [Configure Reference Checking](#)

Defining Color Codes

You can create custom color-coding to apply to Companion Files uploaded by the author during submission, by editors through the File Inventory page, or whenever a user completes a Production Task assignment.

There are two main ways to use the codes:

- Simply define a set of codes, and manually change each Companion File in the File Inventory or when submitting a task.
- Define a set of codes, and also specify a default code for each submission item type – note that color-coding can only be applied to Companion Files, not normal submission files.





You can combine both approaches – for example, using a Red (=Unchecked) color code for all files on upload, changing this manually to Green as each file is checked.

TO CONFIGURE: First, you need to define a set of color codes to use. Use PolicyManager, Configure Color Codes for Companion Files. Each color code requires a color to be selected, plus a description to display when you hover the cursor over the code.

Configure Color Codes for Companion Files

Listed below are the color codes that may be assigned automatically when companion files are uploaded. You may specify a 'default' color (or 'No default color') for companion files on the Edit Submission Item Type page in PolicyManager.

Color codes can also be modified after the companion file has been uploaded. Editor and Publisher Roles with permission to 'Upload, Hide and Restore Companion files' can change the color associated with a companion files on the Change Color Code page.

Order	Color	RGB #	Description	
<input type="text" value="1"/>		000000	Main Submission Text	Edit Remove
<input type="text" value="2"/>		0000FF	Figure Stream	Edit Remove
<input type="text" value="3"/>		FF3300	On-Line only files	Edit Remove
<input type="text" value="4"/>		FFFF00	Editorial	Edit Remove

New Color Code: [Choose Color](#)
[Enter RGB color code or choose with the color picker]

[Insert Special Character](#)

New Color Code Description:
Maximum 256 characters

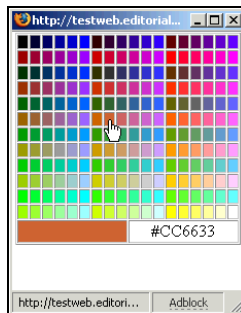
Add Color Code for Companion Files Page

Color Code: [Choose Color](#)
[Enter RGB color code or choose with the color picker]

[Insert Special Character](#)

Color Code Description:
Maximum 256 characters

Hide When you **Hide** Color Code, the Color Code will be deactivated (not available for new companion files).



Once you have a set of codes, they can be assigned manually to individual files through the File Inventory using the Change Color Code link.

Give anyone who needs to change Color Codes the Upload, Hide and Restore Companion files using RoleManager.

You can also set a default color to be used whenever a specific type of Companion File is uploaded.

Defining Companion Files

Before you can use Production Tracking, you must create one or more Submission Items to act as Companion Files. In effect, each submission has two different pools of files

associated with it – the submission files originally submitted by the author for peer-review, and the Companion Files used specifically for production.

Note that you can configure the system so that an author can upload a Companion File, but Companion Files are never built into the PDF approved by the author, or the PDF that is sent for peer-review. Any type of file that needs to be peer-reviewed should not be configured as a Companion File.

Companion Files are controlled through the PDF Handling setting for submission file types.

TO CONFIGURE: Use PolicyManager, Edit Submission Items. To define a submission Item as a Companion File, set the PDF Handling to “Companion File (not built into PDF)”.

Optionally, choose a default color code. When a file of this type is initially uploaded, the color code for that file will be set to this value.

Edit Submission Item Type

[Insert Special Character](#)

Item Type: Maximum 256 characters

Item Type Family:

PDF Handling:

Important Note: If 'Build Hyperlink to the Item into the PDF(Item Not Displayed in PDF)' is selected, there is no restriction on the uploaded file's extension or content. All uploaded files are checked for viruses.

Display with automatic line numbering in PDF

Include this Item Type for Artwork Quality Checking

Include this Item Type for Reference Checking

This Item Type will contain multiple citations inside a single reference. [Example](#)

This Item Type will contain reference annotations. [Example](#)

Choose Default Color Code for Companion file Upload

Order	Color	Description
<input type="radio"/>		No default color
<input checked="" type="radio"/>	■	Main Submission Text
<input type="radio"/>	■	Figure Stream
<input type="radio"/>	■	On-Line only files
<input type="radio"/>	■	Editorial
<input type="radio"/>	■	Data Files

Production Tasks

Production Tasks allow you to follow any production workflow you wish, from a single copy-editing step through to a more complex series of tasks. Each production task has several key configuration areas to allow you to:

- Limit who can assign the task, and who can receive it.

- Say whether you expect files to be returned on completion of the task, and define what kinds of files can be uploaded.
- Define the scheduling of the task: its duration, how long before publication it needs to finish, and whether you wish to track this task in the main Production Status Grid.
- Permit follow-on assignments after completion of this task, to string sequences of tasks together.
- Define any instructions and assignment, cancellation and completion notification letters.

You will need to take some time to analyze your workflow, breaking it down into a list of potential tasks before creating these in Preprint Manager. In general, you should create a task:

- To process submission files. This is the most common type of task, for example “Typesetting”, “Copy-editing” “Correct Artwork”.
- To make files available to someone, for example “Proof-Reading by Author” or “Check-Out Art files”.
- To request information or files from someone, for example “Request for Updated Artwork”.
- To indicate you have reached a key date, for example “Copy Complete”. This would be denoted by a special “Milestone” task.

TO CONFIGURE: Use PolicyManager, Configure Production Tasks.

em Editorial Manager™
 USERNAME: smacrae
 ROLE: Editorial Office
 EM Version: 5.0

Configure Production Tasks

Listed below are previously created Production Tasks. You may Add, Edit, or Remove Production Tasks. Production Tasks may be hidden by clicking the "Edit" link and selecting the "Hide" checkbox on that page.

Order	Production Task Name	Role Family	
<input type="text" value="1"/>	Format manuscript	Editor/ Publisher	Edit
<input type="text" value="2"/>	Request Artwork from Author	Author	Edit
<input type="text" value="3"/>	Copy Editing	Editor/ Publisher	Edit
<input type="text" value="4"/>	Pre-Proof to author	Author	Edit
<input type="text" value="5"/>	Typesetting	Editor/ Publisher	Edit
<input type="text" value="6"/>		Editor/	Edit

This displays a list of currently configured Production Tasks. To remove a task from the list, you can click the Remove link.

Configure Production Tasks

Listed below are previously created Production Tasks. You may Add, Edit, or Remove Production Tasks. Production Tasks may be hidden by clicking the "Edit" link and selecting the "Hide" checkbox on that page.

Order	Production Task Name	Role Family	
<input type="text" value="1"/>	copyedit	Editor/ Publisher	Edit
<input type="text" value="2"/>	au		Edit
<input type="text" value="3"/>	pr		Remove Edit

[Insert Special Character](#)

New Production Task Name:

Maximum Production Task Name is 100 characters

[PolicyManager Main Menu](#)

If the Remove Box does not appear, you will need to Edit and **Hide** the task.

Edit Production Task

[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

Typing text into the Custom Instructions will display an "Instructions" link when the recipient views their task assignments. Leave this field empty to suppress this link.

Production Task Custom Instructions: [Insert Special Character](#)

Please copyedit this manuscript.

To add a task, type a name into the "New Production Task Name:" field and click the "Add" button to display the main Add/Edit Production Task page. You can click Edit by an existing task to modify it.

em Editorial Manager™
 USERNAME: smacrae
 ROLE: Editorial Office
 EM Version: 5.0

Configure Production Tasks

Listed below are previously created Production Tasks. You may Add, Edit, or Remove Production Tasks. Production Tasks may be hidden by clicking the "Edit" link and selecting the "Hide" checkbox on that page.

Order	Production Task Name	Role Family	
<input type="text" value="1"/>	Format manuscript	Editor/ Publisher	Edit
<input type="text" value="2"/>	Request Artwork from Author	Author	Edit
<input type="text" value="3"/>	Copy Editing	Editor/ Publisher	Edit
<input type="text" value="4"/>	Pre-Proof to author	Author	Edit
<input type="text" value="5"/>	Typesetting	Editor/ Publisher	Edit
<input type="text" value="6"/>	Colour Imposition	Editor/ Publisher	Edit
<input type="text" value="7"/>	Proof checking by Author	Author	Edit
<input type="text" value="8"/>	Check out Artwork	Editor/ Publisher	Remove Edit
<input type="text" value="9"/>	Test production task	Editor/ Publisher	Remove Edit

[Insert Special Character](#)

New Production Task Name:

Maximum Production Task Name is 100 characters

[PolicyManager Main Menu](#)

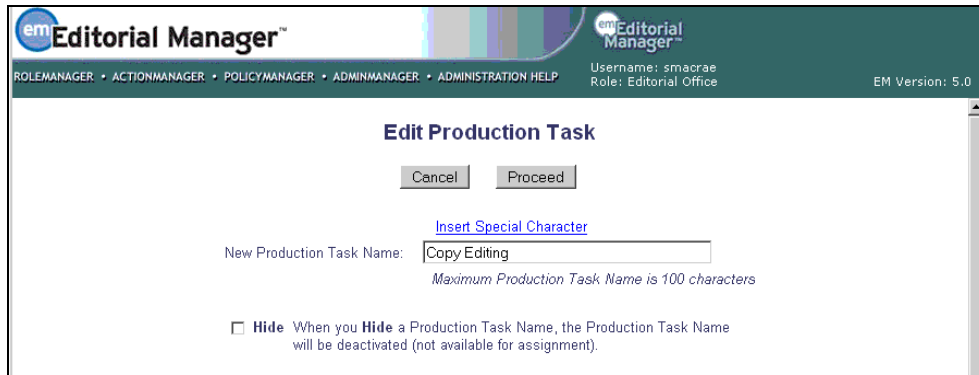
The order in which the tasks are listed is important, as this defines the order in which they will appear across the Production Status Grid. You should order the tasks so that they consecutively reflect your current workflow.

Task ordering is the main way to define a “workflow”, in that earlier tasks appear higher in the list of assignments, and to the left in status grids. You can also add a greater degree of control by using follow-on task assignments, and limiting the types of task each role can assign. However, Preprint Manager will allow you to reassign earlier tasks or assign tasks out of order, as this allows for the greatest flexibility in daily use.

The Edit Production Task screen allows you to set the following options:

General Options

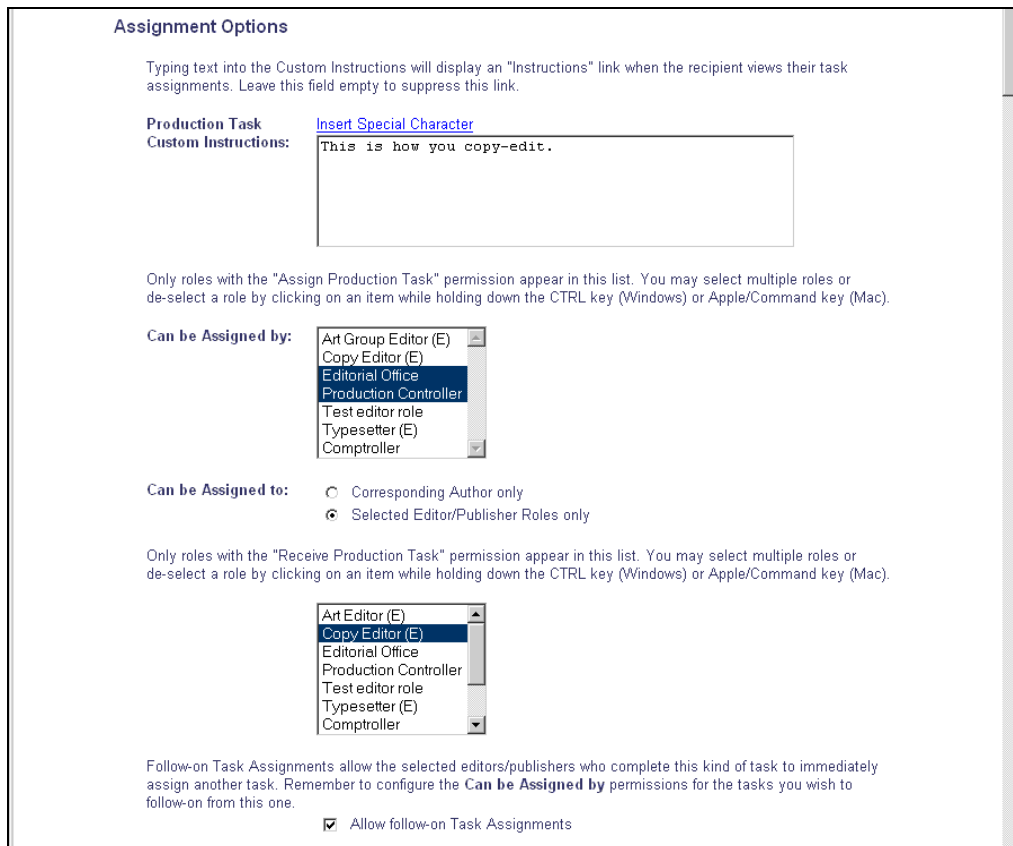
- **New Production Task Name:** Defines the name for the task, shown in status grids and to the recipient of the task. We recommend you do not use the “X sent to Y” format, instead describe the process using “-ing” words, e.g. use “Typesetting”, not “Manuscript to Typesetter”.



- **Hide.** Use this to remove a task from the active list. It can be reinstated at a later date by Editing and clearing this setting.

Assignment Options

- **Production Task Custom Instructions:** Type instructions to the person completing the task here. You should identify the core purpose of the task, provide any checklists to the recipient, and tell them how to complete the task and what files they should upload to you.



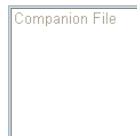
- **Can be Assigned by:** Allows you to define which roles can be allowed to assign the task. For example, you might allow a “Typesetter” to assign an “Author Proof Correction” task, but that is likely to be the only type of task they are allowed to assign.
- **Can be Assigned to:** has two main settings: **Corresponding Author only**, which automatically sends the submission to the author, for example for “Author proofing” tasks; and **Selected Editor/Publisher Roles only**: which defines what types of people can carry out the task, for example “Typesetting” is likely only to be assigned to someone with a role of “Typesetter”.
- **Allow follow-on Task Assignments** if checked, this presents the assignee with an additional “Assign Follow-On Production Task” page from where they can assign one or more additional tasks. Note that you need to make sure that the roles which **this** production task can be assigned to must be able to assign at least one type of Production Task for this to be useful.

Companion File Options

- **Show Warning if File not uploaded when Task is Submitted** should be used for any production task for which you expect new files to be returned to the journal, for example “Typesetting” would normally require several versions of the typeset manuscript (e.g. XML version, PDF proof version).

Companion File Options

- Show Warning if File not uploaded when Task is Submitted
- 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).



- **Limit the Submission Item Types that can be uploaded when Task is Submitted:** allows you to define the types of file that the assignee can return, to simplify the upload process.

NOTE: You will need to create the Item types before you can select them here, using PolicyManager, Edit Submission Items. Only companion files will be available for selection (items designated as “Companion File (Not built into PDF)” in the “PDF Handling”)

Scheduling and Due Date Options

- **Show Task in Production Status Grid** allows you to designate key tasks that will appear in the Production Status Grid. Unless your workflow is very simple, you should not display every possible production task in the Status Grid. For example, if a task is assigned very rarely, it should not appear in the grid, as it will not provide useful information on most submissions. If you have several processes that often occur together, such as “Sub Editing” and “Check Artwork”, you should consider only showing one of these tasks in the grid – probably Sub-Editing, as not all submissions will have artwork to check.
- **Task is a Milestone Task (no due date required):** this allows you to create a Production task which records a significant date purely for display on the Status Grid. It can also be used to trigger a notification to a selected person.

Scheduling and Due Date Options

Show Task in Production Status Grid

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 in the Status Grid. 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:

- **Calculate a Due Date based on:** settings. When you assign a production task, Preprint Manager will calculate the due date based on these settings. You can select any combination of these settings, including no settings at all, and Preprint Manager will take the earliest possible, valid date for the Due date. For most tasks, you will select the “Calculate a Due Date based on: Number of Days after Assignment Date:” option and enter a number of days for the maximum time the task should take. For submissions on the Production Status Grid, you are likely to select one or more of the remaining options:
 - Calculate a Due Date based on: Number of Days after Assignment Date:
 - Calculate a Due Date based on: Number of Days prior to Submission Target Online Publication Date:
 - Calculate a Due Date based on: Number of Days prior to Schedule Group Target Online Publication Date:
 - Calculate a Due Date based on: Number of Days prior to Schedule Group Target Publication Date:

Letter Options

These select the template to use for the standard letters sent when assigning, cancelling or submitting (completing) a task. In each case users will be able to edit the letter before it is sent.

Letter Options

The Letters available for this feature are those assigned to the 'Production' letter family. The letters may be customized prior to being sent.

Assignment Letter:	<input type="text" value="PT - General Assignment"/>
Cancel Assignment Letter:	<input type="text" value="Please Choose a Letter"/>
Submit Task Letter:	<input type="text" value="PT - Copy-Editing complete"/>

There are three standard letters associated with each Production Task:

- **Assignment Letter:** Sent to the person who the task is being assigned to, this should contain instructions on logging in, obtaining the files, and where to go when the recipient has completed their task.
- **Cancel Assignment Letter:** Sent to the person who the task was assigned to, this should let them know that the assignment will no longer appear in their list of assigned tasks.
- **Submit Task Letter:** Sent to the person who assigned the task; this should be a brief notification that the task has been completed, and a reminder to go in and assign the next task, if appropriate.

Scheduling

When you assign a Production Task, PrePrint Manager can be configured to calculate the due date as outlined above. There are three possible dates that can be used for scheduling:

- A Submission Target Online Publication Date. This is manually set for each submission, using the Production Details page. This date is specific to the submission alone, and is not overridden when the submission is assigned to a Schedule Group. It allows you to identify an earlier target date for individual submissions, even if they are assigned to an issue or other Schedule Group.
- A Schedule Group Target Online Publication Date. This is inherited from the Schedule Group when a submission is assigned to it.
- A Schedule Group Target Publication Date. This is the print publication date, and is inherited from a Schedule Group when a submission is assigned to it.

Preprint Manager assumes that a submission that will be published in print will be assigned to an issue to do so, and that the Schedule Group Target Publication Date will be the anticipated date of print publication.

However, it also assumes that you might wish to put an issue on-line as a whole before the print version is released, and so the Schedule Group Target Online Publication date is the anticipated date that this will happen.

In addition, Preprint Manager is designed so that individual submissions can be given a special “ahead of print” publication date, normally an on-line release, handled by the individual submission’s Submission Target Online Publication Date.

Schedule Group Target dates can be modified from the “Manage Schedule Group” folder, by user’s with the **Manage Schedule Groups** permission.

TO CONFIGURE: Use PolicyManager, Configure Production Tasks. For any specific tasks, set the Calculate a Due Date based on: settings to select the target dates to be used in any due date calculations.

If the task has no duration, either uncheck all settings, or set the task to be a Milestone task.

If you do not use forward scheduling, or the task is not on the “critical path”, but should be completed within a set time, select only the “Calculate a Due Date based on: Number of Days after Assignment Date:” option, and enter a default timescale.

If the task is on the main critical path, and must be completed by a certain deadline, you may select Number of Days prior to Submission Target Online Publication Date, Number of Days prior to Schedule Group Target Online Publication Date, or Number of Days prior to Schedule Group Target Publication Date and fill in the appropriate number in the box.

Production Status Terms

There are four new “Production Status” terms introduced; these are displayed on the “Details” and “Production Details” pages. They are:

- Not in Production
- In Production
- Production Completed
- Returned to Production

Unlike the peer-review statuses, these are not editable by the user, and are not intended to give a detailed summary of progress through production. You should use the Production Status Grid to review the current status of submissions in production.

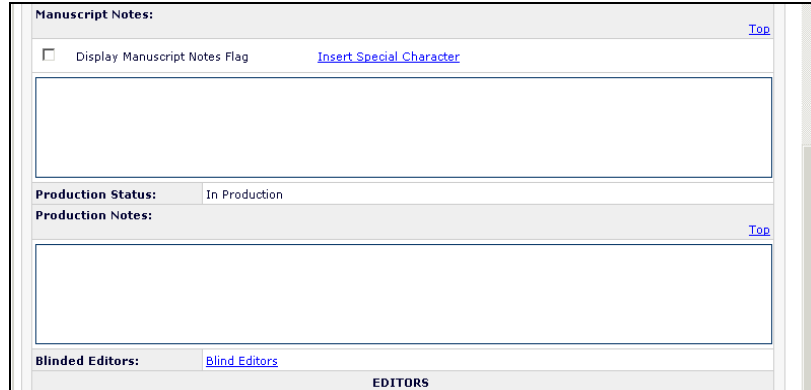
TO CONFIGURE: No configuration is possible; these are terms generated by the system.

Editorial Manager Pages modified by Production Tasks

Details

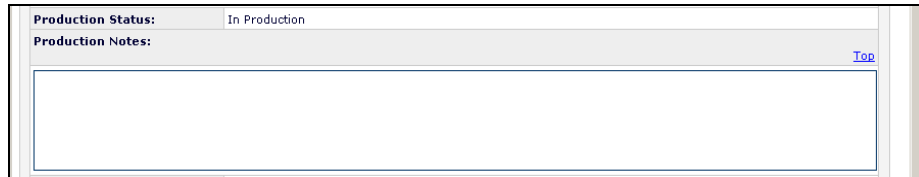
The “Production Notes” field can be displayed on this page for editors who do not have access to the “Production Details” link, but who need to review production notes.

A new “Production Status:” section has been added. If a submission is not yet in production, this displays an “Assign Production Task” link.



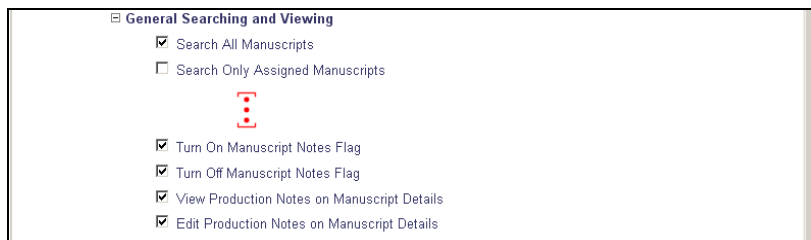
The screenshot shows a web interface section titled "Manuscript Notes:". It includes a checkbox labeled "Display Manuscript Notes Flag" with a blue link "Insert Special Character" to its right. Below this is a large empty text area. Underneath the text area, there is a "Production Status:" label followed by the text "In Production". Below that is another "Production Notes:" label with a blue "Top" link to its right and another large empty text area. At the bottom of this section, there is a "Blinded Editors:" label with a blue "Blind Editors" link. The word "EDITORS" is centered at the very bottom of the section.

Once the first Production Task has been assigned and the submission is in production, this will display the current Production Status for the submission.



The screenshot shows a web interface section titled "Production Status:". It displays the text "In Production" next to the "Production Status:" label. Below this is a "Production Notes:" label with a blue "Top" link to its right and a large empty text area.

TO CONFIGURE: No configuration is required to display the “Production Status” section; it will appear automatically once Production Tasks has been activated for your journal. To allow a user to view the “Production Notes” field, use RoleManager to enable the permissions “View Production Notes on Manuscript Details” and “Edit Production Notes on Manuscript Details” for the desired Editor or Publisher role(s).



The screenshot shows a configuration page titled "General Searching and Viewing". It contains several checkboxes: "Search All Manuscripts" (checked), "Search Only Assigned Manuscripts" (unchecked), "Turn On Manuscript Notes Flag" (checked), "Turn Off Manuscript Notes Flag" (checked), "View Production Notes on Manuscript Details" (checked), and "Edit Production Notes on Manuscript Details" (checked). There is a red icon with three vertical bars and a downward arrow between the search and notes options.

History

Two new sections are added to the standard History view, and their display is controlled by new RoleManager permissions:

- *Production Status History*. This displays a table of all production task assignments and their current status; you can use this to assess how far the submission has progressed.
- *Production Correspondence History*. This displays all Production Task-related letters generated for the current submission.

You may switch between a Status Type view, which separates Production Correspondence from normal correspondence and a Timeline View, which combines these into a single set of correspondence organized by date. The example shows the Status Type view, with a link to Switch to Timeline View.

History for Submission Number 100

[Status History](#) [Production Task History](#) [Correspondence History](#) [Production Correspondence History](#)
[Switch to Timeline View](#)

STATUS HISTORY					
Status Date	Document Status	Status Days	Role Family	Revision	Operator
May 19, 2006	With Editor	----	EDITOR	0	John MacJohn
May 19, 2006	"Submitted" to 'Journal'	----	EDITOR	0	John MacJohn
May 19, 2006	Needs Approval by Author	----	AUTHOR	0	John MacJohn
May 19, 2006	Building PDF	----	AUTHOR	0	John MacJohn
May 19, 2006	Incomplete with Author Test	----	AUTHOR	0	John MacJohn

PRODUCTION TASK HISTORY							
Production Task	Date Task Assigned	Date Task Due	Assigned To	Assigned By	Production Task Status	Date Task Closed	Closed By
Copy Editing	May 19, 2006	May 19, 2006	Charlie Copy-Editor	John MacJohn	Open		
Request Artwork from Author	May 19, 2006	May 19, 2006	John MacJohn	John MacJohn	Open		

CORRESPONDENCE HISTORY					
Correspondence Date	Letter	Recipient	Status	Revision	Operator
May 19, 2006	Editor Assignment	Arnold Editor	With Editor	0	John MacJohn
May 19, 2006	Author Notice of Manuscript Number	John MacJohn	"Submitted" to 'Journal'	0	John MacJohn
May 19, 2006	Journal Office Notice New Submission	Language Editor	"Submitted" to 'Journal'	0	John MacJohn
May 19, 2006	Journal Office Notice New Submission	Arnolde Author-Three	"Submitted" to 'Journal'	0	John MacJohn
May 19, 2006	Author Submits New Manuscript Confirmation	John MacJohn	"Submitted" to 'Journal'	0	John MacJohn
May 19, 2006	PDF Built and Requires Approval	John MacJohn	Building PDF	0	John MacJohn

PRODUCTION CORRESPONDENCE HISTORY				
Correspondence Date	Letter	Recipient	Production Status	Operator
May 19, 2006	PT - Request new artwork from author	John MacJohn	In Production	John MacJohn
May 19, 2006	PT - General Assignment	Charlie Copy-Editor	In Production	John MacJohn

[Status History](#) [Production Task History](#) [Correspondence History](#) [Production Correspondence History](#)
[Switch to Timeline View](#)

TO CONFIGURE: To allow a user to view the new sections, use RoleManager, and edit the desired Editor or Publisher role. Set the permissions “View Production Status History” and “View Production Correspondence History”.

NOTE: The existing Editorial Manager permissions “View Status History” and “View Correspondence History” have been renamed “View Editorial Status History” and “View Editorial Correspondence History”, respectively.

General Searching and Viewing

- Search All Manuscripts
- Search Only Assigned Manuscripts
- Search Similar Articles in MEDLINE
- Search Author Publications in MEDLINE

Bibliographic Search

- Pubmed Search
- Highwire - Title Search

- View Editorial Status History
- View Production Status History
- View Editorial Correspondence History
- View Production Correspondence History

⋮

File Inventory

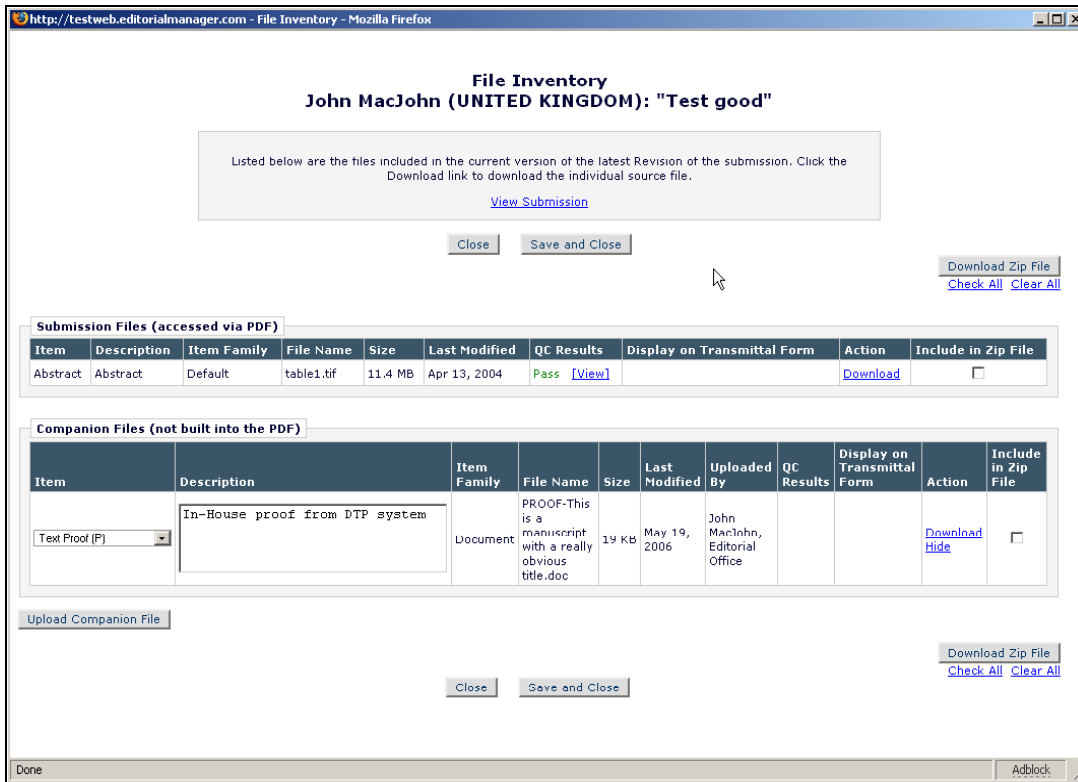
The current “Download Files” link has been renamed “File Inventory” and can be configured to show both Submission files and the new production-task related Companion Files.

View All Assigned Submissions - John MacJohn

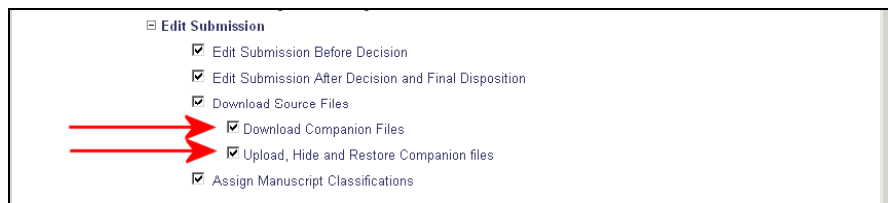
Contents: This page lists all submissions that have been assigned to an Editor, for which the Editor's decision has not yet been made. This includes submissions with invited Reviewers, submissions out for review, submissions requiring a decision, and submissions which have a subordinate Editor's decision but not a decision from the top Editor in the decision-making chain.

Page: 1 of 1 (14 total submissions) Display results per page.

Action	Manuscript Number	Article Type	Article Title	Author Name	Initial Date Submitted	Status Date	Current Status	Editor with Current Responsibility	View Decision
View Submission Details History Classifications Undo Editor Assignment File Inventory Edit Submission Invite Reviewers Solicit Commentary Notify Editor	JXYZ57	Production Test	Submitting to a Journal, an assessment of the major on-line submission systems.	John MacJohn	May 22, 2006	May 22, 2006	With Editor	Arnold Editor	



TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set either of the permissions “Download Companion Files” or “Upload and Remove Companion files”.



Publish Information

A new target date, the “Submission Target Online Publication Date” has been added to the Actual Publication Dates.

The layout of this page changes if the submissions is assigned to a Schedule Group after production has been initiated, to show two columns: Target and Actual Publication Data. For Commentaries, the Target data will initially show the information entered when requesting the commentary. For all other submissions, the Target date will show information entered during the production process, either manually for the submission, or inherited from an assigned Schedule Group.

**Publish Information for Manuscript Number: JXYZ23R1
John MacJohn (UNITED KINGDOM)**

You can enter the Actual Publication Data manually.

Cancel Submit

Actual Submission Publication Data	
Online Publication Date:	<input type="text"/> (mm/dd/yyyy)
Publication Date:	<input type="text"/> (mm/dd/yyyy)
Number of Pages:	<input type="text"/>
Start Page:	<input type="text"/>
End Page:	<input type="text"/>
Volume Number:	<input type="text"/>
Issue Number:	<input type="text"/>
TOC Position:	<input type="text"/>
DOI:	<input type="text"/>

Cancel Submit

**Publish Information for Manuscript Number: JXYZ-D-03-0007R1
John MacJohn (UNITED KINGDOM): "Test of submission approval process."**

You can enter the Actual Publication Data manually.

You may click the 'Copy Targets to Actual' button if you want all Target Submission Publication Data automatically copied to the Actual Submission Publication Data, then click 'Submit' to save the information.

Copy Targets to Actual Cancel Submit

Target Submission Publication Data		Actual Submission Publication Data	
Online Publication Date:		Online Publication Date:	<input type="text"/> (mm/dd/yyyy)
Publication Date:	06/01/2006	Publication Date:	<input type="text"/> (mm/dd/yyyy)
Number of Pages:	5	Number of Pages:	<input type="text"/>
Start Page:	11	Start Page:	<input type="text"/>
End Page:	15	End Page:	<input type="text"/>
Volume Number:	47	Volume Number:	<input type="text"/>
Issue Number:	6	Issue Number:	<input type="text"/>
TOC Position:	2	TOC Position:	<input type="text"/>
		DOI:	<input type="text"/>

Copy Targets to Actual Cancel Submit

TO CONFIGURE: No configuration is necessary.

Transmittal Form

The transmittal form layout is unchanged. Any Companion files uploaded before the Final Disposition is set to "Accept" will automatically appear on the transmittal form; you will need to manually de-select them to avoid their being sent to the publisher.

**Transmittal Form for Manuscript Number: JXYZ54
John MacJohn (UNITED KINGDOM)**

A journal can insert any specific instructions for the person filling out the Transmittal Form, or for someone receiving the printed Transmittal Form. Such instructions can be inserted here. Additional instructions can be inserted at the bottom of this form.

Source Files

Item Type	Item Description	File Name	Last Modified	Actions	Original Item Artwork Quality/Reference Check Results	Include Item in Publisher Zip File	Substitute Item Artwork Quality Results
PDF	PDF			View	N/A	<input checked="" type="checkbox"/>	N/A
Original Manuscript (P)	Original Manuscript (P)	text.pdf	Apr 27, 2006	Download Original Item	N/A	<input checked="" type="checkbox"/>	N/A

Companion Files

Item Type	Item Description	File Name	Last Modified	Actions	Quality Results	Include Item in Transmittal / Include Item in Publisher Zip File
Corrected Proof (P)	updated	Document.rtf	May 10, 2006	Download Original Item	N/A	<input checked="" type="checkbox"/>

Author Main Menu

Two new folders have been added to the main menu for authors. These will only appear once the first Production Task has been assigned to the author.

- *Current Task Assignments* lists all production tasks assigned to this author. Authors must use this folder to complete production tasks and upload any files to the journal.
- *Completed Production Task Assignments* lists all production tasks that this author has completed. The author can use this to review the progress of the submission, and any covering letter sent at the time of assignment.

Author Main Menu

Production Task Assignments (11)
[Current Task Assignments](#) (11)

New Submissions
[Submit New Manuscript](#)
 Submissions Sent Back to Author (0)
 Incomplete Submissions (0)
[Submissions Waiting for Author's Approval](#) (1)
[Submissions Being Processed](#) (6)

Revisions
[Submissions Needing Revision](#) (2)
 Revisions Sent Back to Author (0)
 Incomplete Submissions Being Revised (0)
 Revisions Waiting for Author's Approval (0)
 Revisions Being Processed (0)
 Declined Revisions (0)

Completed
[Submissions with a Decision](#) (11)
[Completed Production Task Assignments](#) (9)

Preprint Publications (0)
 WebFirst Table of Contents (0)

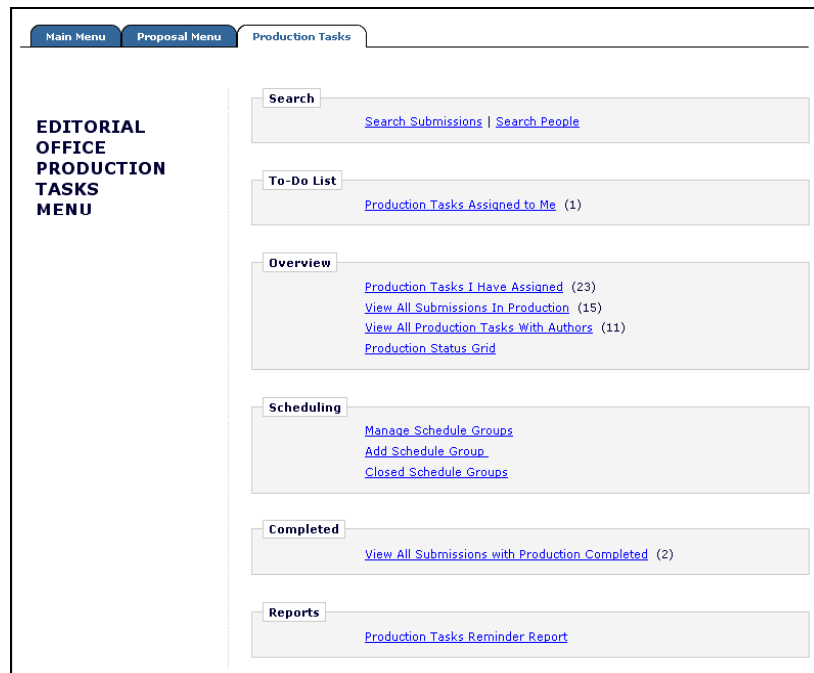
TO CONFIGURE: No configuration is necessary; once a production task has been assigned, the folders will appear. You can, however, decide to configure the system so

that *only* these two folders will appear, as described in the Suppressing Author Submissions section above.

Note: you will need to have at least one Production Task configured with “Can be Assigned to:” set to “Corresponding Author Only”. If you don’t, you can’t ask the author to complete a task for you.

Production Tasks Menu

Editors and Publishers with access to production task permissions will see a new “Production Tasks” menu tab on their main page.



TO CONFIGURE: To enable the production tasks features, you must contact your Editorial Manager representative to activate this Preprint Manager feature. Once this has been enabled, you must use RoleManager to enable one or more of the Production Task-related permissions.

Several key permissions define which links will appear in the Production Tasks menu:

- **View All Submissions in Production:** Shows the View All Submissions in Production and View All Production Tasks with Authors folders. Also affects the options available when viewing the Production Status Grid.
- **View Production Status Grid:** Shows the Production Status Grid from the main menu, plus additional links from each production tracking page.
- **Manage Schedule Groups:** Shows the links to the Manage Schedule Groups and Closed Schedule Groups; also shows the Add Schedule Group link, which does not link to a folder but allows you to set up a new Schedule Group.

- **Send Production Reminders:** Shows the link to the main Production Reminder report, to allow you to list overdue production tasks, and send chase emails.
- **Assign Production tasks:** Once you have used this to assign at least one production task, you will see the Production Tasks I Have Assigned” folder.
- **Receive Production tasks:** Shows the Production Tasks Assigned to Me folder, listing all Production Tasks you have yet to complete.

Edit Role Definition

Role Name:
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

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

- New Submissions**
- Editor Assignment**
- Preprint Manager**
 - Initiate Production
 - Serve as Corresponding Production Editor
 - Change Corresponding Production Editor
 - View Schedule Groups
 - Manage Schedule Groups
 - Edit Submission Target Online Publication Date
 - View Production Details
 - View Production Status Grid
 - View All Submissions in Production
 - End Production/Return to Production
 - Assign Production Task
 - Cancel Production Task Assignment
 - Override Production Task Due Date
 - Receive Production Task
 - Send Production Reminders
 - Download Reviewer Attachments
 - Edit Reviewer Attachments
 - View Reference Checking Results

Setting Production Task menu as default

You can also make this the default menu for users who will deal mainly or exclusively with production tasks, and who do not need to work with the main editorial menu. Links to the main editorial menu will remain on each production task page, so this will not prevent access to this.

TO CONFIGURE: Use Search People to locate the user, and then click on their name to edit their settings. Locate the “Default Login Menu” option and set to “Production Menu”.

Search People - Update Information

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

Mr John MacJohn

Self-Registered:
04/30/2003

Last Modified:
Mon May 22 04:32:55 EDT 2006

[Inactivate this User](#)

[Insert Special Character](#)

User Information

The username you choose must be unique within the system. If the one you choose is already in use, you will be asked for another.

User Name *

Password *

Re-type Password *

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

Default Login Role:

Default Login Menu:

Available as a Reviewer? * Yes No

Board Member? Yes No

Forbidden as a Reviewer? Yes No

Reviewer Role *

Publisher Role *

Editorial Role *

Editor Description

[Activity Details](#)

[Additional People Details](#)

[Insert Special Character](#)

Personal Information

Production Tasks Assigned to Me

Production Tasks Assigned to Editor John MacJohn

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

[Switch to Status Grid View](#)

Action	Manuscript Number	Author Name	Article Title	Production Task	Date Task Assigned	Date Task Due	Days Until Due	Assigned By	Schedule Group	Section/Category	Article Type
View Assignment Letter Assignment Files Submit Task Assign Production Task Production Details History Transmittal Form Edit Submission	3XY245	Anne Author (UNITED KINGDOM)	DO NOT PUT INTO PRODUCTION - Test of accepted, not yet published submission.	Copy Editing	Mar 17, 2006	Mar 22, 2006	58 days overdue	John MacJohn	Physics Pool		Letter to the Editor

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

[Switch to Status View](#)

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

This folder shows the currently logged-in user any Production Tasks that have been assigned to them to work on. Use this folder to:

- Review your task lists and due dates
- Download any files made available to you as part of a specific task.
- Submit a task (complete the task, optionally uploading files to the journal in the process).

You may also carry out additional actions, such as assigning other tasks or viewing Production Details depending on your permissions.

There are two views available for this folder. The folder will initially list all individual assignments, and you may see a particular submission more than once if you have more than one assignment related to it. If you have the permission to view the Production

Status Grid view, the Switch to Status Grid View link will show all submissions in the Status Grid view; this provides a table of submissions and assigned tasks to allow you to check the current status of all related submissions.

TO CONFIGURE: Enable the RoleManager permission **Receive Production Task** to display this link for any role that will work on production tasks. You must also configure at least one Production Task so that it can be assigned *to* users with that role. Make sure you have assigned the role to at least one user. Enable the **View Production Status Grid** permission to allow users to switch to the “Status Grid” view, but note this will give them access to details of all assignments on a submission.

Production Tasks I have Assigned

Production Tasks I Have Assigned

Contents: This page lists all Production Tasks You have assigned. When a production task is completed, it is removed from this folder.

Page: 1 of 1 (34 total tasks) Display 100 results per page.

Action	Manuscript Number	Author Name	Article Title	Production Task	Assigned To	Date Task Assigned	Date Task Due	Days Until Due	Schedule Group	Section/Category	Article Type	Initial Date Submitted
Cancel Assignment Assign Production Task Production Details History Transmittal Form File Inventory	JXYZ-D-03-00007R1	John MacJohn (UNITED KINGDOM)	Test of submission approval process.	Copy Editing	John Test-editor	Apr 05, 2006	Apr 10, 2006	39 days overdue	June 2006 Volume		Original Article	Jan 31, 2006
Cancel Assignment Assign Production Task Production Details History Transmittal Form File Inventory	JXYZ24	Anne Author (UNITED KINGDOM)	Test reviewer cancel after proxy reg.	Request Artwork from Author	Anne Author	Mar 23, 2006	Mar 26, 2006	54 days overdue			Original Article	Mar 23, 2006

Page: 1 of 1 (34 total tasks) Display 100 results per page.

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

This folder shows the currently logged-in user details of any Production Tasks they have assigned on to someone else to work on. Use this folder to:

- Cancel a Production Task assignment, and send a notification to the assignee that this has happened.

You may also carry out additional actions, such as assigning other tasks or viewing Production Details depending on your permissions.


TO CONFIGURE: Enable the RoleManager permission **Assign Production Task** to display this link for any role that will assign tasks to other users. You must also configure at least one Production Task so that it can be assigned *by* users with that role. Make sure you have assigned the role to at least one user.

View All Submissions in Production

View All Submissions in Production

Contents: This page lists all submissions where at least one production task has been assigned, or the submission has been assigned to a Schedule Group. Submissions will move out of this folder when the End Production action is used, or if they are associated with a Schedule Group when that group is closed.

Page: 1 of 1 (25 total submissions) Display 100 results per page.

Action	Manuscript Number	Author Name	Article Title	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
Assign Production Task Production Status Grid Production Details History Transmittal Form File Inventory Edit Submission	JXYZ56	John MacJohn (UNITED KINGDOM)	The testing of TT15281: and why not?			Production Test	May 19, 2006	May 19, 2006	
Assign Production Task Production Status Grid Production Details   History Transmittal Form File Inventory Edit Submission	JXYZ54	John MacJohn (UNITED KINGDOM)	Test 4.0-04-2b part 3			Production Test	Apr 27, 2006	Apr 27, 2006	
Assign Production Task End Production Production Status Grid Production Details  History Transmittal Form File Inventory Edit Submission	JXYZ-D-03-00003	John MacJohn (UNITED KINGDOM)	Sample	Physics Pool		Rapid communication	Feb 20, 2003	May 18, 2006	

Page: 1 of 1 (25 total submissions) Display 100 results per page.

[Production Status Grid](#)
[Production Tasks Reminder Report](#)
[Production Tasks Menu](#)
[Editorial Menu](#)

This folder lists all submissions with the statuses “In Production” or “Returned to Production”, i.e. which are available for production tasks. Use this folder for a quick overview of submissions in production, as you can sort this table by any column.

You can access general Production Task-related information and carry out key Actions from this view:

- Assign Production Tasks
- End Production

TO CONFIGURE: Enable the RoleManager permission **View All Submissions in Production**. The Action Links that appear will depend on which other Preprint Manager permissions are enabled. Note that the Schedule Group name listed in the main table of submissions will appear as a link to the details of the Schedule Group if a user has either of the permissions “View Schedule Groups” or “Manage Schedule Groups” set.

View All Production Tasks with Authors

Production Tasks with Authors
Contents: This page lists all submissions with Production Tasks assigned to Authors. When a production task is completed, it is removed from this folder.

Page: 1 of 1 (22 total tasks) Display results per page.

Action ▲	Manuscript Number ▲▼	Author Name ▲▼	Article Title ▲▼	Production Task ▲▼	Date Task Assigned ▲▼	Date Task Due ▲▼	Days Until Due ▲▼	Assigned By ▲▼	Schedule Group ▲▼	Section/Category ▲▼	Article Type ▲▼	Initial Date Submitted ▲▼
Cancel Assignment Assign Production Task Production Details ! History Transmittal Form File Inventory	JXY213	Anne Author (UNITED KINGDOM)	Let's pass this on by proxy.	Pre-Proof to author	Apr 26, 2006	Apr 29, 2006	20 days overdue	P. Rod Uction			Original Article	4/26/2006 5:54:51 AM
Cancel Assignment Assign Production Task Production Details ■ History Transmittal Form File Inventory	JXY252	John MacJohn (UNITED KINGDOM)	Test 4.0-04-2b part 1	Pre-Proof to author	Apr 26, 2006	Apr 29, 2006	20 days overdue	Charlie Copy-Editor			Production Test	4/26/2006 11:50:02 AM

Page: 1 of 1 (22 total tasks) Display results per page.

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

This folder lists all tasks that have been assigned to an author, whoever originally assigned them. Use this folder to:

- Cancel a Production Task assignment and send a notification to the author.

You may also carry out additional actions, such as assigning other tasks or viewing Production Details depending on your permissions.

TO CONFIGURE: Enable the RoleManager permission **View All Submissions in Production**.

Production Status Grid

Use this folder to review the progress of all submissions through the production process. It displays the status of key Production Tasks for listed submissions.

Production Status Grid

Page: 1 of 1 (6 total submissions) Show: [4(1) - Mar 2007] Display 100 results per page.

[Grand Totals](#) [Download Grid](#)

Action	Manuscript Number	Author Name	Date Production Started	Copy Editing	Typesetting	Proof checking by Author	Text production task	Submission Target Online Date	Schedule Group	Section/Category	Article Type	Target TOC Position	Target Number of Pages	Target Start Page	Target End Page	Black and White Image Count	Color Image Count
Production Details History Transmittal Form Assign Production Task File Inventory	JXYZ-D-03-00012	Dr Arnold Author-Three (UNITED KINGDOM)	Jan 19, 2006	Due Mar 06, 2006 John MacJohn					4(1) - Mar 2007		Original Article	1	0	0	0	0	0
Production Details History Transmittal Form Assign Production Task File Inventory	JXYZ-D-03-00021	Dr Arnold Author-Three (UNITED KINGDOM)	Feb 08, 2006	Submitted Feb 17, 2006 John MacJohn					4(1) - Mar 2007		Original Article	5	0	0	0	0	0

[Download Grid](#)

Page: 1 of 1 (6 total submissions) Display 100 results per page.

Grand Totals

	Number of Pages	Black and White Image Count	Color Image Count
Budget	0	0	0
Current	1013	265	132

The key feature of this page is the list of Production Tasks listed across the grid, between the Date Production Started and Submission Target Online Publication Dates. You can choose the key Production Tasks that appear in this grid.

By initially listing all submissions In Production, the can be further filtered to present:

- Submissions not currently assigned to a Schedule Group.
- All submissions assigned to any schedule group
- Submissions assigned to a specific Schedule Group.

You can access general Production Task-related information and carry out key Actions from this view:

- Assign Production Tasks
- End Production

TO CONFIGURE: Only specified tasks will appear on the grid. To select a task for the Status Grid, go to PolicyManager and click the “Configure Production Tasks” link under the Preprint Manager section heading. Select and Edit a Production Task, then set the **Show Task in Production Status Grid** permission to have the task appear in the grid.

To allow users with a particular role to view the grid enable the RoleManager permission **View Production Status Grid**.

Manage Schedule Groups

This folder lists all Schedule Groups that are currently active. A Schedule Group is roughly equivalent to an issue, although it can be used to group submissions together for other purposes. If you want to add an Issue to the system, you would add it as a new

schedule group, and set pagination targets. You could also add create schedule groups to handle batches of submissions for other purposes, such as a batch for uploading to a Web site. However, a submission can only belong to **one** schedule group at a time.

Manage Schedule Groups

Page: 1 of 1 (5 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	Target Publication Issue	Target Online Date	Black and White Image Budget	Color Image Budget	Current Black and White Image Count	Current Color Image Total
Edit Group Details Production Status Grid Close Group	Physics Pool	0	9	0	40					0	0	14	14
Edit Group Details Production Status Grid Close Group	4(4) - Dec 2007	13	0	112	0	Dec 01, 2007	4	4	Dec 01, 2007	0	0	0	0
Edit Group Details Production Status Grid Close Group	4(2) - Jun 2007	12	0	112	0	Jun 01, 2007	4	2	Jun 01, 2007	0	0	0	0
Edit Group Details Production Status Grid Close Group	4(1) - Mar 2007	12	6	230	1013	Mar 01, 2006	47	6	Mar 01, 2006	0	0	265	132
Edit Group Details Production Status Grid Close Group	4(3) - Sep 2007	15	1	112	14	Sep 01, 2007	4	3	Sep 01, 2007	0	0	6	0

Page: 1 of 1 (5 total Schedule Groups) Display 10 results per page.

[Add Schedule Group](#)

Use this folder to:

- Add new Schedule Groups (e.g. add issues)
- Set target publication dates plus target page and content budgets for a group
- Assign submissions to a specific schedule group
- Move submissions between schedule groups
- Modify existing Schedule Group settings
- Close Schedule groups to move them out of production

TO CONFIGURE: Only specified users can manage schedule groups. To enable this folder for users with a specific role, go to RoleManager, Editor Role or Publisher Role, select the role and set the **Manage Schedule Groups** permission.

The related permission **View Schedule Group Details** allows users to check a Schedule Group's details whenever they see the group's name. To enable this, go to RoleManager, Editor Role or Publisher Role, select a role and set this permission.

Add Schedule Group

This allows you to create a new schedule group, for example to add a new issue. This is a new Action Link, also available on the main Production Tasks menu. See the section on New Action Links, below, for more details.

TO CONFIGURE: Go to RoleManager, Editor Role or Publisher Role, select the role and set the **Manage Schedule Groups** permission.

Closed Schedule Groups

Closed Schedule Groups

The Schedule Groups listed below have been closed. New Production Tasks cannot be assigned for any of the submissions in these groups. To assign additional Production Tasks, click 'Re-open Group'.

Page: 1 of 1 (4 total Schedule Groups) Display 10 results per page.

Action	Schedule Group	Target Number of Submissions	Current Number of Submissions	Page Budget	Page Count	Target Publication Date	Target Publication Volume	Target Publication Issue	Target Online Date	Black and White Image Budget	Color Image Budget	Black and White Image Count	Color Image Count
Re-open Group Production Status Grid	November issue	16	1	160	0	Nov 30, 2006	6	4	Nov 16, 1906	0	8	0	0
Re-open Group Production Status Grid	August 2006 issue	16	0	160	0	Aug 31, 2006	6	3	Aug 18, 2006	0	5	0	0
Re-open Group Production Status Grid	Biology Pool	0	1	0	0					0	0	0	0
Re-open Group Production Status Grid	Test SG	0	0	0	0					0	0	0	0

Page: 1 of 1 (4 total Schedule Groups) Display 10 results per page.

This folder lists all schedule groups that have been previously closed, for example, issues which have been published. **Note:** groups must currently be manually closed to remove them from production and into this folder. Use this folder to:

- Reopen closed schedule groups.
- Review published material.

TO CONFIGURE: Go to RoleManager, Editor Role or Publisher Role, select the role and set the **Manage Schedule Groups** permission.

View All Submissions with Production Completed

This folder lists all submissions where production has been completed, and therefore have the production status Production Completed.

View All Submissions with Production Completed

Contents: This page lists all submissions which have been marked as 'Production Complete'

Page: 1 of 1 (3 total) Display 10 results per page.

Action	Manuscript Number	Author Name	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Production Completed Date	Production Completed By
Return to Production Production Details History Transmittal Form File Inventory	JXY253	Anne Author (UNITED KINGDOM)			Rapid communication	Aug 17, 2004	Mar 01, 2006	John MacJohn
Return to Production Production Details History Transmittal Form File Inventory	JXYZ-D-03-0009R2	Enn Editor (ITALY)	4(1) - Mar 2007		Original Article	Mar 26, 2003	Apr 20, 2006	John MacJohn
Return to Production Production Details History Transmittal Form File Inventory	JXY215	Anne Author (UNITED KINGDOM)	Physics Pool		Original Article	Jul 10, 2003	Apr 06, 2006	John MacJohn

Page: 1 of 1 (3 total) Display 10 results per page.

Use this folder to:

- Return submissions to production.
- Access data and files for completed submissions

NOTE: submissions must currently be manually closed to remove them from production and into this folder. This can be done for individual submissions, but note that all submission assigned to a schedule group will be closed and moved into this folder when the associated Schedule Group is closed.

TO CONFIGURE: Enable the RoleManager permission **View All Submissions in Production**.

Production Tasks Reminder Report

This report allows you to create a list of tasks that may be overdue, nearly due, or which have been in progress for a specified time. You can choose to generate reminder letters from the list. The reporting process spans several pages.

The first page allows you to define your report; use the options here to limit your report to specific sets of submissions, tasks or assignees, and to define the date range for your reminders.

Production Tasks Reminder Report

Please select the report parameters. This report will produce a list of people who have open (incomplete) production tasks. Reminders can be sent from the report results page.

Select Production Task:

Select Schedule Group:

Assigned To: [Check All](#) [Clear All](#)

Author
 Art Editor
 Copy Editor
 Typesetter

Using the above selections:

Show open Production Tasks Assignments regardless of due date.

Show open Production Tasks which are due between and (mm/dd/yyyy)

Show open Production Tasks for Submissions with a Submission Target Online Publication Date between and (mm/dd/yyyy)

Show open Production Tasks for Submissions with a Schedule Group Target Online Publication Date between and (mm/dd/yyyy)

Show open Production Tasks for Submissions with a Schedule Group Target Publication Date between and (mm/dd/yyyy)

Show open Production Task Assignments for Target Publication Volume and Issue

Show open Production Tasks with more than elapsed days since the Production Task was assigned.

Show open Production Tasks that are within days of their due date.

Show open Production Tasks that are days past their due date.

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.

Article Type: [Select All](#)
 [Clear All](#)
 [Clear All](#)

Section/Category: [Select All](#)
 [Clear All](#)

Use **Select Production Task** to limit the report run to just one type of task.

Use **Select Schedule Group** to limit the report run to tasks associated with submissions that have been assigned to one schedule group, for example to chase up tasks for a specific issue.

Use the **Assigned to** check boxes to limit the report to tasks assigned to selected types of user.

Choose one of the “Show open Production Tasks...” settings to base the report on. For example, choose the option “Show open Production Tasks that are [] days past their due date.” and set the figure to “0” to list all submissions due today.

You can further limit the results to specific article types and section/category settings.

Production Tasks Reminder Report

Content: Check the box under the 'Send Reminder' column to send a reminder letter to that person.
 You will have the opportunity to customize the individual reminder letters after clicking the 'Send Reminders' button.

Page: 1 of 1 (12 total submissions) Display 100 results per page.

[Check All](#) [Clear All](#)

Send Reminder	Production Task	Assigned To	Date Task Assigned	Date Task Due	Days Until Due	Date Last Reminder Sent	# Reminders Sent	Total Elapsed Days	Manuscript Number	Author Name	Schedule Group	Section/Category	Article Type	Submission Target Online Date
<input type="checkbox"/>	Copy Editing Production Details History	Charlie Copy-Editor	Feb 28, 2006	Mar 05, 2006	78 days past due		0	83	JXYZ-D-03-00016	Arnolde Author-Three (UNITED KINGDOM)	Physics Pool		Original Article	
<input type="checkbox"/>	Copy Editing Production Details History	John MacJohn	Mar 01, 2006	Mar 06, 2006	77 days past due		0	-82	JXYZ-D-03-00012	Arnolde Author-Three (UNITED KINGDOM)	4(1) - Mar 2007		Original Article	
<input type="checkbox"/>	Copy Editing Production Details History	John MacJohn	Mar 02, 2006	Mar 07, 2006	76 days past due		0	-81	JXYZ-D-03-00007R1	John MacJohn (UNITED KINGDOM)	4(1) - Mar 2007		Original Article	
<input type="checkbox"/>	Copy Editing Production Details History	Charlie Copy-Editor	Feb 08, 2006	Feb 13, 2006	98 days past due	Apr 13, 2006	1	-103	JXYZ-D-03-00021	Arnolde Author-Three (UNITED KINGDOM)	4(1) - Mar 2007		Original Article	

[Check All](#) [Clear All](#)

Page: 1 of 1 (12 total submissions) Display 100 results per page.

[Back to Production Tasks Reminder Report](#)
[Return to Production Tasks Main Menu](#)
[Back to Main Menu](#)

After you Submit your search, you are presented with a list of task assignments matching the search you just set up; you can select specific assignments and click the Send Reminders button to send reminder emails, as per normal Editorial Manager reminders. You can only do this if you have already set up one or more reminder letters and assigned them to the “Production Reminder” letter family.

TO CONFIGURE: To allow users with a specific role to run the report, go to RoleManager, Editor Role or Publisher Role, select the role and enable the permission **Send Production Reminders**.

Before you can generate reminder letters for production tasks, you need to create standard reminder templates. Go to PolicyManager and select “Edit Letters” under the *E-mail and Letter Policies* heading. Click “Add New Letter” to create a new template, and select “Production Reminder” as the letter family. Create a letter using the mail-merge fields listed below.

Search Submissions/Search People

These are the same as the Search links on the main editorial menu. With Production Tasks enabled, the Search Submissions page is enhanced.

- The DOI has been added to the Search Criteria you search for and can appear in the search results, if you have configured it as a selected identifier as described above.

- New Production-Task specific links are added to the Action column, based on your current permissions.
- The Advanced Criteria have been enhanced to allow you to filter your searches according to production status. If you cannot find a submission you know to be in production, check these criteria.
- Links back to the main Production Tasks pages have been added.

SEARCH SUBMISSIONS - SEARCH RESULTS

Manuscript Number CONTAINS '43'

Page: 1 of 1 (1 total submissions) Display 100 results per page.

Action	Manuscript Number	Article Type	Article Title	Short Title	Keywords	Classifications	Current Status	Status Date	Initial Date Submitted	Author Name	Reviewers	Handling Editor	Assigned Editors	Section/Category
View Submission Details Production Details History File Inventory Edit Submission Solicit Commentary Classifications Undo Editor Assignment Notify Editor Invite Reviewers	JXYZ43	Rapid communication	Test of proxy assigning of production tasks				With Editor	03/17/2006	03/17/2006	Anne Author		Arnold Editor	Arnold Editor	

Page: 1 of 1 (1 total submissions) Display 100 results per page.

[Editor Main Menu](#)

Advanced criteria

Save my Advanced Criteria.

Advanced Criteria

Exclude Submissions with the Author (submission has not yet been submitted to the journal office). Not excluded are submissions that have been submitted to the journal, but have been sent back to the author through the Edit Submission feature.

Exclude Revisions with the Author (revision has not yet been submitted to the journal office). Not excluded are revisions that have been submitted to the journal, but have been sent back to the author through the Edit Submission feature.

Exclude Submissions where Final Disposition has been set.

Include only Submissions where Manuscript Notes flag is turned on.

Exclude Conference Submissions.

Include only Submissions which are currently in production.

Also include submissions where production has ended

Include only Submissions where production has ended.

The permission **Include only submissions which are currently in production** limits searches to submissions with the Production Status “In Production” or “Returned to Production”. With the subsidiary permission **Also include submissions where production has ended** set, the search will also include submissions with the production statuses “Production Completed” or “Production Cancelled”.

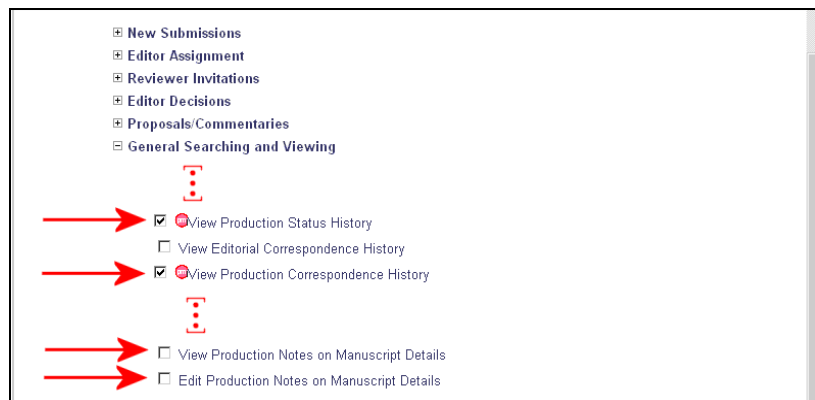
The permission **Include only submissions where production has ended** limits searches to submissions with the production statuses “Production Completed” or “Production Cancelled”.

TO CONFIGURE: Selecting the normal search permissions in RoleManager will also make the Search links available on the Production Tracking menu as well. Searching can only be enabled for Editor Roles, not Publisher Roles.



New Viewing and Editing permissions

Several permissions have been added to the general View permissions to allow both editors working on peer review and production staff to review production notes and history.



Other permissions control who can create or edit production-related information.

Edit Role Definition

Role Name:
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform.

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

New Submissions

Preprint Manager

- Initiate Production
- Serve as Corresponding Production Editor
- Change Corresponding Production Editor
- View Schedule Groups
- Manage Schedule Groups
- Edit Submission Target Online Publication Date
- View Production Details
- View Production Status Grid
- View All Submissions in Production
- End Production/Return to Production
- Assign Production Task
- Cancel Production Task Assignment
- Override Production Task Due Date
- Receive Production Task
- Send Production Reminders
- Download Reviewer Attachments
- Edit Reviewer Attachments
- View Reference Checking Results

- View Production Details is the most important – anyone who can see the Production Details page will be able to modify some metadata, such as the production notes.
- View Schedule groups allows you to see the details of the submissions assigned to each schedule group, and any associated pagination information.
- View Production Status Grid allows users to view an overview of the progress of many submissions through key production tasks; you can allow users to check progress of individual submissions by giving them the View Production Status History permission.
- Change Corresponding Production Editor allows you to change the person associated with the submission as Corresponding Production Editor. Note that the associated permission, Serve as Corresponding Production Editor, has to be set for at least one role and more than one person associated with that role for this to be useful
- Edit Submission Target Online Publication date allows you to set a target online publication date for an individual submission. Note that users with this permission are likely to need the Manage Schedule Groups permission, as that allows them to set target Online and regular Publication Dates for the schedule group as a whole.
- Override Production Task Due Dates allows you to change the date an individual assignment is due. You should consider enabling this for any user who can Assign a production task, unless you wish to limit their ability to delay your schedule.

New Action Links

As with Editorial Manager, you process submissions by using Action links associated with individual submissions within a Production Tasks folder; most of these are controlled by RoleManager permissions.

Note that you do not need to use the “View Production Notes on Manuscript Details” and “Edit Production Notes on Manuscript Details” permissions for production staff with the “View Production Details” permission; the Production Details page assumes these permissions are present for anyone who can view it.

The existing Editorial Manager “download files” permission has been expanded to include:

- Download Companion Files
- Upload Companion Files

You need to enable these to allow users to access the companion files from the File Inventory Action link. **Note:** anyone who is assigned a production task will still be able to upload companion files when completing a task. You do not need to give people the Upload Companion Files permission if they will only send you files as part of a task assignment.

Companion files are Production-Specific files – all files returned as a result of a Production Task assignment are uploaded as Companion Files. Note that you can allow authors to upload Companion Files during submission, but these files are intended to be production-only and will not be built into the PDF seen by authors.

The screenshot shows the 'Edit Role Definition' interface. At the top, the title is 'Edit Role Definition'. Below it, the 'Role Name' is set to 'Production Controller' in a text box, with a note below stating 'Maximum Role name is 40 characters.' Below this, there is a horizontal line and the text 'Check the functions that this role is permitted to perform.' Underneath, there are two links: 'Expand All' and 'Collapse All'. A list of permissions follows, each with a plus sign icon to its left:

- ▣ New Submissions
- ▣ Editor Assignment
- ▣ Reviewer Invitations
- ▣ Editor Decisions
- ▣ Proposals/Commentaries
- ▣ General Searching and Viewing
- ▣ Edit Submission
 - Edit Submission Before Decision
 - Edit Submission After Decision and Final Disposition
 - Download Source Files
 - Download Companion Files
 - Upload, Hide and Restore Companion files
 - Assign Manuscript Classifications

Finally, Production Task-specific permissions directly control the Action Links available to you in the Production Task menus.

- Initiate Production adds a new action link, Assign Production Task, to the main Manuscript Details page (not the Production Details page). This allows an editor working on a submission to start tracking production tasks.

NOTE: this is not linked to the transmittal process; that is designed to send a submission to a separate production system.

- End Production/Return to Production allows you to take a submission out of production.

NOTE: you cannot End Production for a submission with one or more open Production Task Assignments. You can also end production on a submission by closing the Schedule Group to which it is assigned.

- Manage Schedule Groups allows you to Close and Re-Open schedule groups. Closing a Schedule group removes it from production, and closes all associated submissions. If you re-open a schedule group, the associated submissions are **not** automatically re-opened; you will need to reinstate these individually.
- Assign Production Task allows you to assign a production task.

NOTE: you need to make sure that at least one production task has been configured to allow this role to assign it, and has at least one valid recipient.

- Cancel Production Task Assignment allows you to cancel a task you have assigned.
- View Production Details displays the Production Details link on Production Tracking pages.

The results of each action link are described below.

Assign Production Task (Initiate Production)

To move a submission into Production, a user with the Initiate Production permission assigns the first production task. A user with this permission will see an “Assign Production Task” link in the main Details page, accessed from the Main Editorial Manager menu.

View All Submissions in Production

Contents: This page lists all submissions where at least one production task has been assigned, or the submission has been assigned to a Schedule Group. Submissions will move out of this folder when the End Production action is used, or if they are associated with a Schedule Group when that group is closed.

Page: 1 of 1 (26 total submissions) Display results per page.

Action	Manuscript Number	Author Name	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
Assign Production Task Production Status Grid Production Details History Transmittal Form File Inventory Edit Submission	JXYZ57	John MacJohn (UNITED KINGDOM)	4(3) - Sep 2007	News and Views	Production Test	May 22, 2006	May 22, 2006	Aug 14, 2007

Use this link to initiate production, taking you through the process of:

- Assigning the submission to a Schedule Group (optional).
- Assigning the first Production Task.
- Assigning any additional production tasks relevant at this stage.

**Initiate Production and Assign Production Task
for Manuscript Number: JXYZ57
John MacJohn (UNITED KINGDOM)**

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:

Submission Target Online Publication Date: (mm/dd/yyyy)

**Initiate Production and Assign Production Task
for Manuscript Number: JXYZ57
John MacJohn (UNITED KINGDOM)**

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:

Schedule Group Target Online Publication Date: Sep 01, 2007

Schedule Group Target Publication Date: Sep 01, 2007

Submission Target Online Publication Date: (mm/dd/yyyy)

If you assign a submission to a schedule group, you can add additional pagination and running order information if you know it, or a user with the Modify Schedule Group permission can go in later and add this.

**Initiate Production and Assign Production Task
for Manuscript Number: JXYZ57
John MacJohn (UNITED KINGDOM)**

Enter any desired metadata for the submission into the boxes below, then click 'Proceed'

Target Table of Contents Position:

Target Number of Pages:

Target Start Page:

Target End Page:

Black and White Image Count:

Color Image Count:

Table of Contents for Schedule Group "[4\(3\) - Sep 2007](#)"

This Schedule Group does not yet contain any other submissions.

After assigning to a schedule group, you can submit without assigning a production task; this will initiate production without assigning the first Production Task.

**Initiate Production for Manuscript Number: JXYZ57
John MacJohn (UNITED KINGDOM)**

Please confirm and submit the information below. Click the 'Back' button to change the information for the current submission

Table of Contents for Schedule Group "[4\(3\) - Sep 2007](#)"

Target TOC Position	Manuscript Number	Article Title	Article Type	Target Number of Pages	Target Start Page	Target End Page	Black and White Image Count	Color Image Count
3	JXYZ57	Submitting to a Journal; an assessment of the major on-line submission systems.	Production Test	14	1	14	6	0

Use the Submit and Assign Production Task to start production by assigning the first task in the workflow.

**Assign Production Task for Manuscript Number JXYZ57
"Submitting to a Journal; an assessment of the major on-line submission systems."**

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.

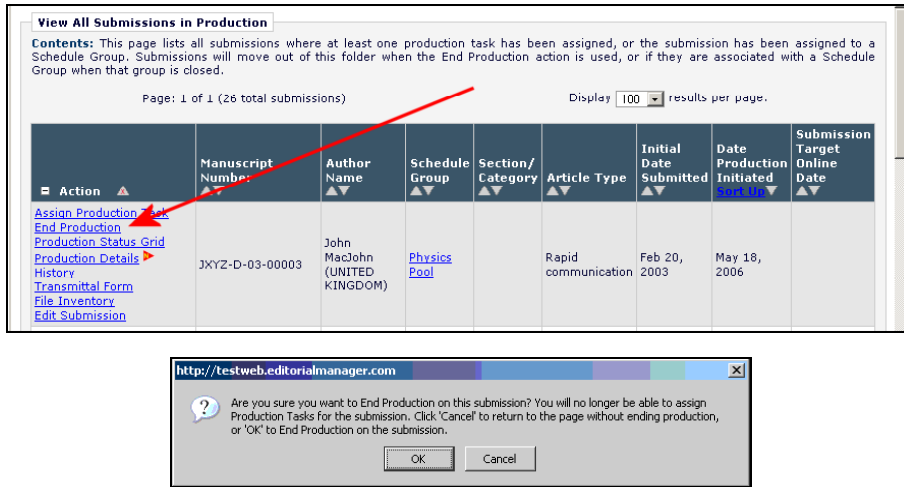
Schedule Group: [4\(3\) - Sep 2007](#)

Production Task:

End Production

Allows you to take a submission out of production, when no more production tasks can be assigned; you will normally do this after the submission has been published (you would also use the Publish Information link to set the final publication dates). The submission's Production Status changes to "Production Completed".

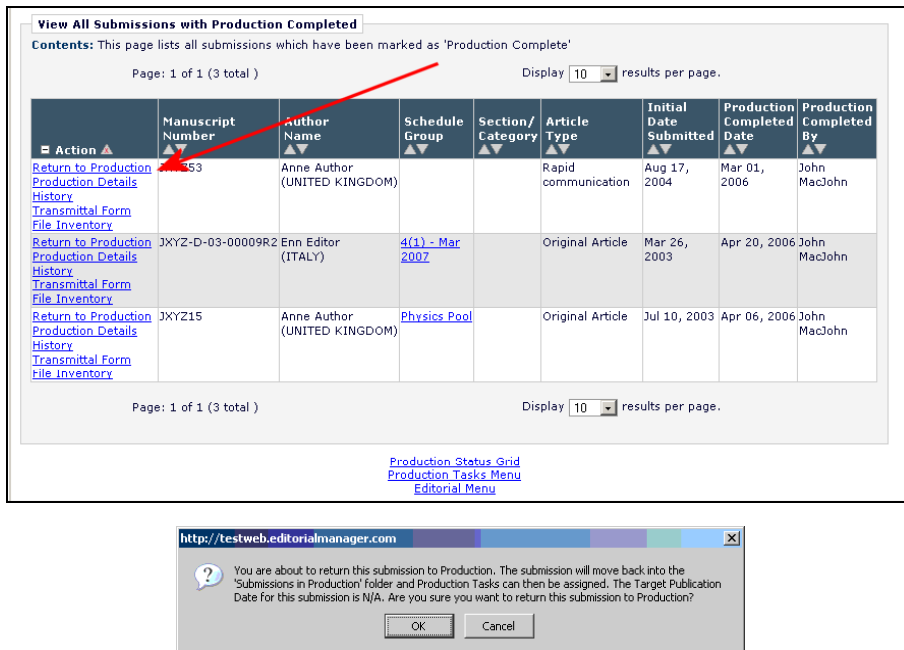
Note: End Production only appears when there are no open production task assignments. If you do not see this option for a specific submission, you may need to cancel any outstanding production tasks on that submission.



TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “End Production/Return to Production”.

Return to Production

Available only from the “View All Submissions with Production Completed” folder, this function reinstates the submission. The Production Status changes to “Returned to Production” and the submissions returns to the “All Submission in Production” folder.



TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “End Production/Return to Production”.

Add Schedule Group

Creates a new Schedule Group – if you are working with Volumes and Issue, then add each Issue as a Schedule Group. Schedule Groups can be given volume and issue numbers, and contain basic page and image budget information.

Manage Schedule Groups

Page: 1 of 1 (6 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	Target Publication Issue	Target Online Date	Black and White Image Budget	Color Image Budget	Current Black and White Image Count	Current Color Image Total
Edit Group Details Production Status Grid Close Group	Physics Pool	0	9	0	40					0	0	14	14
Edit Group Details Production Status Grid Close Group	4(4) - Dec 2007	13	0	112	0	Dec 01, 2007	4	4	Dec 01, 2007	0	0	0	0
Edit Group Details Production Status Grid Close Group	5(1) - Jan 2008 Issue	15	2	112	0	Jan 04, 2008	5	1	Dec 14, 2007	0	0	0	0
Edit Group Details Production Status Grid Close Group	4(2) - Jun 2007	12	0	112	0	Jun 01, 2007	4	2	Jun 01, 2007	0	0	0	0
Edit Group Details Production Status Grid Close Group	4(1) - Mar 2007	12	6	230	1013	Mar 01, 2006	47	6	Mar 01, 2006	0	0	265	132
Edit Group Details Production Status Grid Close Group	4(3) - Sep 2007	15	1	112	14	Sep 01, 2007	4	3	Sep 01, 2007	0	0	6	0

Page: 1 of 1 (6 total Schedule Groups) Display 10 results per page.

[Add Schedule Group](#)
[Closed Schedule Groups](#)
[Production Status Grid](#)
[Production Tasks Reminder Report](#)
[Production Tasks Menu](#)
[Editorial Menu](#)

You can define a target publication date, and a separate target online publication date for each group. The group description will appear in production tracking lists.

When you create a Schedule Group, you can assign submissions using the Submit and Add Submissions to Group button; otherwise, just submit the group and you can add submissions later.

Add Schedule Group

Schedule Group Description:

Maximum Schedule Group Description is 100 characters

Schedule Group Notes:

Schedule Group Target Online Publication Date: (mm/dd/yyyy)

Schedule Group Target Publication Date: (mm/dd/yyyy)

Schedule Group Target Publication Volume:

Schedule Group Target Publication Issue:

Target Number of Submissions:

Page Budget:

Black and White Image Budget:

Color Image Budget:

TO CONFIGURE: Use RoleManager to enable the Manage Schedule Group permission.

Edit Group Details

Manage Schedule Groups

Page: 1 of 1 (6 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	Target Publication Issue	Target Online Date	Black and White Image Budget	Color Image Budget	Current Black and White Image Count	Current Color Image Total
Edit Group Details Production Status Grid Close Group	Physics Pool	0	9	0	40					0	0	14	14
Edit Group Details Production Status Grid Close Group	4(4) - Dec 2007	13	0	112	0	Dec 01, 2007	4	4	Dec 01, 2007	0	0	0	0
Edit Group Details Production Status Grid Close Group	5(1) - Jan 2008 Issue	15	2	112	0	Jan 04, 2008	5	1	Dec 14, 2007	0	0	0	0

Allows you to modify the schedule group information, for example to add submissions to the group, to remove them, or to change the order in which submissions appear within the group.

Edit Schedule Group Details/Add Submissions

Schedule Group Description: [Insert Special Character](#)
Maximum Schedule Group Description is 100 characters

Schedule Group Notes: [Insert Special Character](#)

Schedule Group Target Online Publication Date: (mm/dd/yyyy)

Schedule Group Target Publication Date: (mm/dd/yyyy)

Schedule Group Target Publication Volume:

Schedule Group Target Publication Issue:

Target Number of Submissions:

Page Budget:

Black and White Image Budget:

Color Image Budget:

Table of Contents

Action	Target TOC Position	Manuscript Number	Author Name	Section/Category	Article Type	Submission Target Online Date	Target Number of Pages	Target Start Page	Target End Page	Black and White Image Count	Color Image Count
Production Details Transmittal Form Remove from Group	<input type="checkbox"/>	JXYZ-D-03-00012	Arnolde Author-Three (UNITED KINGDOM)		Original Article		0	0	0	0	0
Production Details Transmittal Form Remove from Group	<input type="checkbox"/>	JXYZ-D-03-00007R1	John MacJohn (UNITED KINGDOM)		Original Article		5	11	15	0	0
Production Details Transmittal Form Remove from Group	<input type="checkbox"/>	JXYZ-D-03-00009R2	Enn Editor (ITALY)		Original Article		0	0	0	0	0
Production Details Transmittal Form Remove from Group	<input type="checkbox"/>	JXYZ-D-03-00004	John MacJohn (UNITED KINGDOM)		Original Article		999	0	0	256	123
Production Details Transmittal Form Remove from Group	<input type="checkbox"/>	JXYZ-D-03-00021	Arnolde Author-Three (UNITED KINGDOM)		Original Article		0	0	0	0	0
Production Details Transmittal Form Remove from Group	<input type="checkbox"/>	JXYZ-D-03-00018	Joe Blagg (UNITED STATES)		Original Article		9	9	9	9	9

Add Submission

This function allows you to assign submissions to the Schedule Group, building up a table of contents.

Edit Schedule Group Details/Add Submissions

Schedule Group Description: [Insert Special Character](#)
Maximum Schedule Group Description is 100 characters

Schedule Group Notes: [Insert Special Character](#)

You can choose from unassigned submissions, or switch to a list of assigned submissions, allowing you to move submissions into the current Schedule Group from others.

Color Image Budget: 0

Table of Contents

Action	Target TOC Position	Manuscript Number	Author Name	Section/Category	Article Type	Submission Target Online Date	Target Number of Pages	Target Start Page	Target End Page	Black and White Image Count	Color Image Count
Production Details Transmittal Form Remove from Group	1	JXYZ-D-03-00010R1	Anne Author (UNITED KINGDOM)		Rapid communication		0	0	0	0	0
Production Details Transmittal Form Remove from Group	2	JXYZ1	Arnold Test-Author (UNITED KINGDOM)		Production Test		0	0	0	0	0

Update Target TOC Position

Cancel Submit Add Submissions

Done Adblock

Once you have added new submissions, you will return to the Edit Group Details page, where you should check the order of submissions.

Add Submission to Group 5(1) - Jan 2008 Issue

Select one or more submissions and click the 'Add to Schedule Group' button to add them to the Schedule Group.

Cancel Add to Schedule Group

Select from Submissions Currently Assigned to Other Schedule Groups

Submissions with no Schedule Group

Check All Clear All	Action	Manuscript Number	Author Name	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
<input checked="" type="checkbox"/>	Production Details Transmittal Form	JXYZ-D-03-00010R1	Anne Author (UNITED KINGDOM)		Rapid communication	Mar 26, 2003	May 10, 2006	
<input type="checkbox"/>	Production Details Transmittal Form	JXYZ-D-03-00010R1	Anne Author (UNITED KINGDOM)		Rapid communication	Mar 26, 2003	May 10, 2006	
<input checked="" type="checkbox"/>	Production Details Transmittal Form	JXYZ1	Arnold Test-Author (UNITED KINGDOM)		Production Test	Jun 12, 2003	Jan 31, 2006	

Select from Submissions Currently Assigned to Other Schedule Groups

Cancel Add to Schedule Group

Remove From Group

This removes an individual submission from the schedule group.

Black and white image budget: 0

Color Image Budget: 0

Table of Contents

Action	Target TOC Position	Manuscript Number	Author Name	Section/Category	Article Type	Submission Target Online Date	Target Number of Pages	Target Start Page	Target End Page	Black and White Image Count	Color Image Count
Production Details Transmittal Form Remove from Group	1	JXYZ-D-03-00010R1	Anne Author (UNITED KINGDOM)		Rapid communication		0	0	0	0	0
Production Details Transmittal Form Remove from Group	2	JXYZ1	Arnold Test-Author (UNITED KINGDOM)		Production Test		0	0	0	0	0

Update Target TOC Position

Close Group

This takes the entire schedule group “out of production”. All submissions within the schedule group will be set to “Production Complete”, and the Schedule Group will move to the Closed Schedule Group folders.

Page: 1 of 1 (6 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	Target Publication Issue	Target Online Date	Black and White Image Budget	Color Image Budget	Current Black and White Image Count	Current Color Image Total
Edit Group Details Production Status Grid Close Group	Physics Pool	0	9	0	40					0	0	14	14

Note: You cannot close a Schedule Group if any submission assigned to it has any open production task assignments. You will need to Cancel or submit any outstanding assignments to close the Group.

Assign Production Task/Assign Another Production Task

Allows you to assign a production task to another person. When assigning a production task, you can select files to make available to the recipient and customise the notification email that will be sent. Once you have completed one task assignment, you can assign a second from the confirmation page.

View All Submissions in Production

Contents: This page lists all submissions where at least one production task has been assigned, or the submission has been assigned to a Schedule Group. Submissions will move out of this folder when the End Production action is used, or if they are associated with a Schedule Group when that group is closed.

Page: 1 of 1 (26 total submissions) Display 100 results per page.

Action	Manuscript Number	Author Name	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
Assign Production Task Production Status Grid Production Details History Transmittal Form File Inventory Edit Submission	JXY257	John MacJohn (UNITED KINGDOM)	4(3) - Sep 2007	News and Views	Production Test	May 22, 2006	May 22, 2006	Aug 14, 2007

During task assignment, you **must** select the files to make available to the person carrying out the task, unless they have permission to access the File Inventory for all submissions. You can select from original submission files from the author, or any Companion files that have been uploaded to the system.

The assignment process takes several steps.

- 1) Selecting the production task to assign. Users with the “View Production Status History” will see this displayed here, to allow you to check the task has not already been assigned. You will only see the list of tasks for which your role is selected under “Can be Assigned by”.

Assign Production Task for Manuscript Number JXYZ57
"Submitting to a Journal; an assessment of the major on-line submission systems."

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.

Schedule Group: [4\(3\) - Sep 2007](#)
 Production Task:

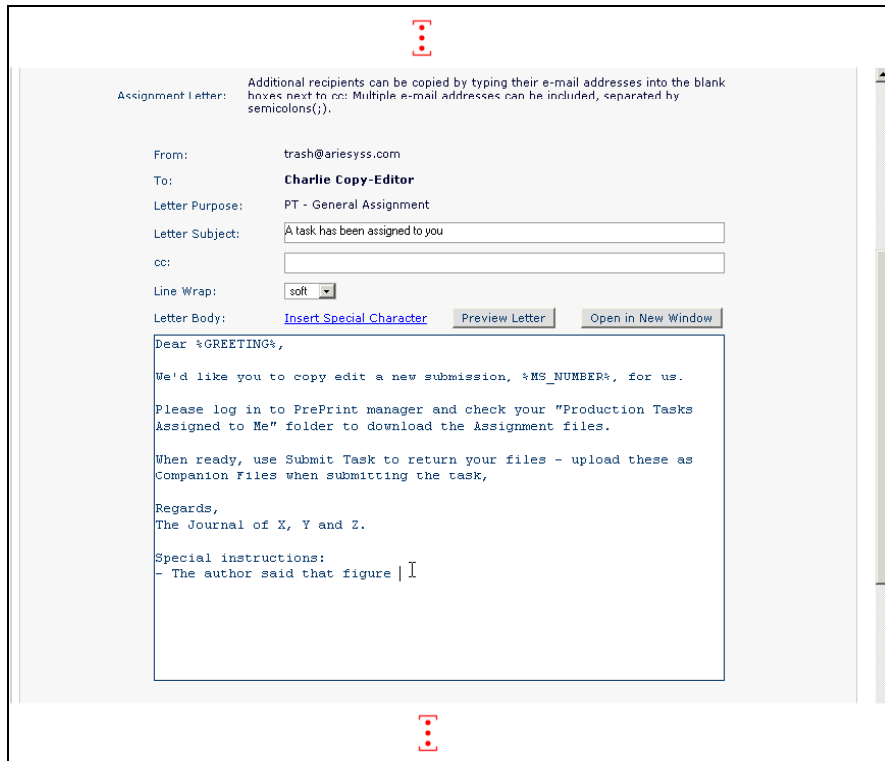
PRODUCTION TASK HISTORY						
Production Task	Date Task Assigned	Date Task Due	Assigned To	Production Task	Date Task Closed	Closed By
Format manuscript	May 22, 2006					

- 2) After selecting the task, the page refreshes to display the full assignment letter and companion files. The next step is to select the correct recipient for the task; Preprint Manager will check the “Can be assigned to” setting, and list only those users with valid roles. If there is only one possible recipient on the database, they will automatically be selected. If you select a Corresponding Author task, the Corresponding Author will automatically be selected.

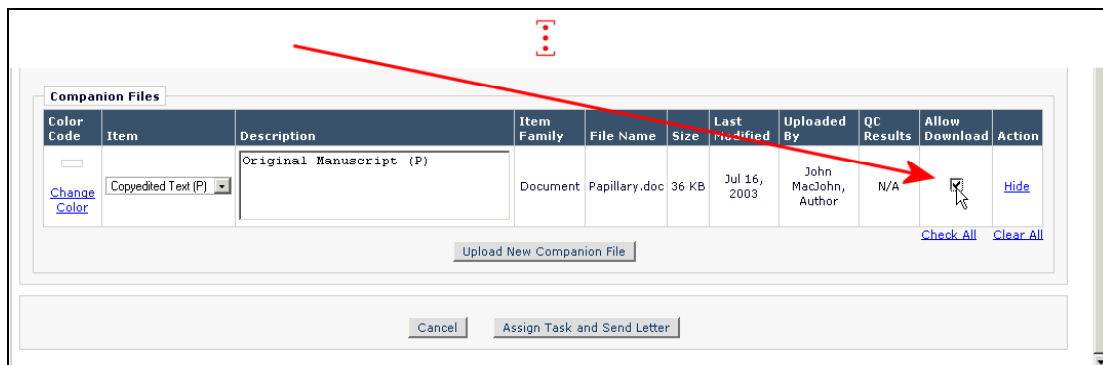
Assign Production Task for Manuscript Number: JXYZ57
John MacJohn (UNITED KINGDOM):

Schedule Group: [4\(3\) - Sep 2007](#)
 Production Task: Copy Editing
 Due Date: (mm/dd/yyyy)
 Task Assigned to:
 Assignment Letter: by typing their e-mail addresses into the blank boxes next to cc: Multiple e-mail addresses can be included, separated by semicolons(;).

- 3) Edit the “letter Body” field to add any special instructions to the standard template that is displayed; this is the email that will be sent to the assigned person. You can also modify the subject area and add cc: addresses (**Note:** this is not a Blind Carbon Copy, or bcc: – the recipient will see these email addresses).



- 4) You should then select the files you want the assignee to work on as part of the task assignment. For users without access to the File Inventory, this is the only way they can download files from the system. For example, you can make the original manuscript text files available to the copy editor. You can upload additional Companion files at this point, and make these available to the recipient.



- 5) When you have selected the files, Click Assign Task and Send letter to complete the task assignment. You can assign another task from the confirmation screen.

**Production Task Assignment Confirmation for Manuscript Number: JXYZ57
John MacJohn (UNITED KINGDOM):**

An e-mail has been sent to prod@... notifying P. Rod Uction of the production task assignment 'Format manuscript' for Manuscript Number JXYZ57.

[Assign Another Production Task for this Submission](#)
[Production Status Grid](#)
[Production Tasks Menu](#)
[Main Menu](#)

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “Assign Production Task”. You may also wish to set the associated permissions “Cancel Production Task Assignment” and “Override Production Task Due Date”.

The Production Task History section will only appear if you have the “View Production Status History” permission enabled.

Use PolicyManager to configure a set of production tasks that each role is allowed to assign, and to ensure that roles are configured to receive each task.

Assign Follow-On Task

If you submit a task that is configured to Allow Follow-On Task Assignments, then you will see the Assign Follow-On Production Tasks. You can continue to assign follow-on tasks from this page, and it will list all tasks assigned after completing the initial assignment.

Note: when assigning follow-on tasks, users without full File Inventory access can only pass Companion files that were sent to them for the initial assignment on to the next assignee, plus any Companion Files they have just uploaded.

For example, if you send a Manuscript file to a typesetter, and they upload a First Proof, and they are allowed to assign a Follow-On task of “Author Proof Correction” to the author, they will only be able to send the author the manuscript file originally assigned to them, plus the proof they just uploaded.

Users with full File Inventory access can assign any Companion Files when assigning a Follow-On Task.

**Assign Follow-On Production Tasks after task: Copy Editing
Manuscript Number JXYZ45**

“DO NOT PUT INTO PRODUCTION - Test of accepted, not yet published submission.”

You have successfully completed the Production Task: Copy Editing. Please assign any subsequent Tasks required. You should assign all tasks arising from the recently completed task, as you may not have the permissions to assign tasks elsewhere.

Follow-On Tasks Assigned			
Production Task	Assigned To	Date Task Due	Days Until Due
Typesetting	Technical Typesetting	May 22, 2006	Due Today
Request Artwork from Author	Anne Author	May 22, 2006	Due Today

Cancel Assignment

Allows you to cancel an assignment; a notification letter will be sent, which you can customise. Users with “Assign Production Task” permissions will see this option on any task they have assigned. Users with “View All Submissions in Production” will see this option for all assignments listed in the “View All Production Tasks with Authors” folder. Cancelling an assignment generates a letter to the assignee.

Production Tasks I Have Assigned

Contents: This page lists all Production Tasks You have assigned. When a production task is completed, it is removed from this folder.

Page: 1 of 1 (38 total tasks) Display 100 results per page.

Action	Manuscript Number	Author Name	Production Task	Assigned To	Date Task Assigned	Date Task Due	Days Until Due	Schedule Group	Section/Category	Article Type	Initial Date Submitted
Cancel Assignment Assign Production Task Production Details History Transmittal Form File Inventory	JXYZ57	John MacJohn (UNITED KINGDOM)	Format manuscript	P. Rod Uction	May 22, 2006	Jun 03, 2007	376 days	4(3) - Sep 2007	News and Views	Production Test	May 22, 2006

Cancel Production Task Assignment for Manuscript Number: JXYZ57 John MacJohn (UNITED KINGDOM)

Production Task: Copy Editing
Task Currently Assigned to: Charlie Copy-Editor
Cancellation Letter:
 Additional recipients can be copied by typing their e-mail addresses into the the blan boxes next to cc:. Multiple e-mail addresses can be included, separated by semicolons(:).

From: John MacJohn
To: **Charlie Copy-Editor**
Letter Purpose: PT - Generic Cancellation Letter
Letter Subject: Notification of task cancellation
cc:
Line Wrap: soft

Letter Body:

Dear Dr Copy-Editor,

 We assigned a submission to you process; this is to notify you that we have cancelled the original assignment.

 Additional information:
 - I forgot to attach the file; I will reassign to you with files.

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “Cancel Production Task”.

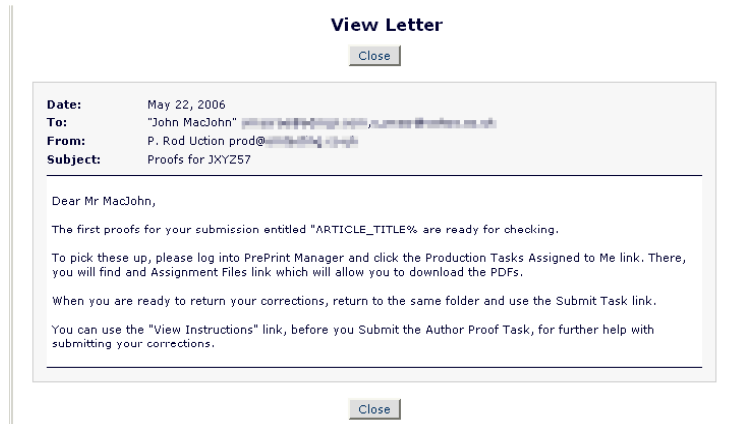
View Assignment Letter

Current Task Assignments for John MacJohn

Page: 1 of 2 (11 total tasks) Display 10 results per page.

Action	Task	Date Task Assigned	Date Task Due	Days Until Due	Manuscript Number	Article Title	Assigned By
View Assignment Letter View Instructions Submit Task Send E-mail	Proof checking by Author	May 22, 2006	May 22, 2006	1 day overdue	JXYZ57	Submitting to a Journal; an assessment of the major on line submission systems.	P. Rod Uction

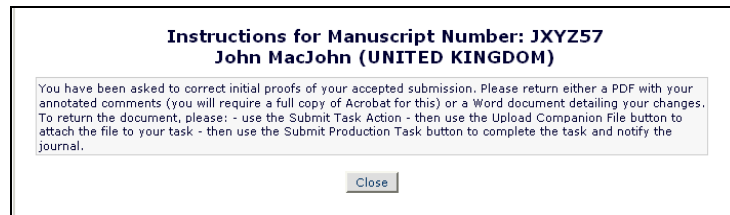
When viewing a list of your assigned production tasks, you can re-read the email that was sent to you on assignment of the task.



TO CONFIGURE: No configuration required; anyone who has been assigned a task with a covering email will see this link.

View instructions (authors only)

When authors review the list of production tasks assigned to you, this allows them to check any task instructions. Note that this link will only appear if instructions have been written when the task was configured.



TO CONFIGURE: No configuration is required to allow users to view the link; it will appear on assigned tasks where instructions have been written. To add instructions to a task, use PolicyManager, Configure Production Tasks and Edit the Production Task to add instructions to. Type your instructions into the "Production Task Custom Instructions:" field. You can include HTML in the instructions.

Assignment Files

When viewing a list of production tasks assigned to you, this allows you to download the files for that assignment. Note that only files specifically selected during assignment will be made available here.

Production Tasks Assigned to Editor Charlie Copy-Editor

Page: 1 of 1 (9 total tasks) Display 10 results per page.

[Switch to Status Grid View](#)

Action	Manuscript Number	Author Name	Production Task	Date Task Assigned	Date Task Due	Days Until Due	Assigned By	Schedule Group	Section/Category	Article Type
View Assignment Letter Assignment Files Submit Task Assign Production Task Production Details History	JXYZ50	John MacJohn (UNITED KINGDOM)	Copy Editing	Apr 21, 2006	Apr 26, 2006	27 days overdue	John MacJohn	Physics Pool		Original Article

Page: 1 of 1 (9 total tasks) Display 10 results per page.

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

Assignment Files for Manuscript Number: JXYZ45
Anne Author (UNITED KINGDOM)

To return a copy-edited file: - Ensure you rename each file to add a 'COPY-ED-' prefix - Click the Submit Task Action - Click the Upload Companion file button to upload each edited file in turn - Enter any comments in the "Letter Body" - Click the "Submit Production Task" button.

[Close](#)
[Download Zip File](#)

Item	Description	File Name	Last Modified	QC Results	Action
Manuscript	Manuscript	Abstract text.doc	Feb 19, 2003	Fail View	Download

[Download Zip File](#)
[Close](#)

TO CONFIGURE: No configuration required, but you should remember to select any files to be worked on when assigning each task.

Submit Task

This allows you to notify the journal office that you have completed an assignment, and to upload any new files to the system.

Production Tasks Assigned to Editor Charlie Copy-Editor

Page: 1 of 1 (9 total tasks) Display 10 results per page.

[Switch to Status Grid View](#)

Action	Manuscript Number	Author Name	Production Task	Date Task Assigned	Date Task Due	Days Until Due	Assigned By	Schedule Group	Section/Category	Article Type
View Assignment Letter Assignment Files Submit Task Assign Production Task Production Details History	JXYZ50	John MacJohn (UNITED KINGDOM)	Copy Editing	Apr 21, 2006	Apr 26, 2006	27 days overdue	John MacJohn	Physics Pool		Original Article

Page: 1 of 1 (9 total tasks) Display 10 results per page.

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

Edit the Letter Body to return any special comments to the journal office; you should consider modifying the Production Task instructions and Assignment letters to let the users who carry out tasks know to do this.

**Submit Production Task for Manuscript Number: JXYZ45
Anne Author (UNITED KINGDOM)**

To return a copy-edited file: - Ensure you rename each file to add a 'COPY-ED-' prefix - Click the Submit Task Action - Click the Upload Companion file button to upload each edited file in turn - Enter any comments in the "Letter Body" - Click the "Submit Production Task" button.

Production Task: Copy Editing
Due Date: Mar 22, 2006

Letter Subject: %CORR_AUTHOR% Copy-editing complete

Letter Body: [Insert Special Character](#)

Copy editing is complete.
No special comments - good to go.

Original Assignment Files

Item	Description	File Name	Last Modified	QC Results	Action
Manuscript	Manuscript	Abstract text.doc	Feb 19, 2003	Fail View	Download

Newly Uploaded Files
No files have been uploaded as part of task submission

Use the Upload File button to attach completed files. It's important not to forget to do this for most Production Tasks, so make sure the Production Task configuration option "Show Warning if File not uploaded when Task is Submitted" is checked.

**Upload Companion Files
for Manuscript Number: JXYZ45
Anne Author (UNITED KINGDOM)**

[Insert Special Character](#)

Important Note: This page allows you to upload a new file to attach to this submission as part of the task assignment you are about to submit.

Choose an **Item**, enter a **Description**, select a file, and click **Upload This File** to include a new file in the list of Companion Files.

Item: Copyedited Text (P) ▾

Description: Copy Edited by JMJ.

File Name: EDITED - Papillary.doc

TO CONFIGURE: All task assignments will make the Submit Task link available to the recipient, but you can change the behaviour of the task on assignment. Use Policy Manager, Configure Production Tasks, and Edit the Production Task to change the settings.

Set the option Allow follow-on Task Assignments to display the Follow-On Task Assignment page when this type of task is completed.

Set the option Show Warning if File not uploaded when Task is submitted to warn users if they forget to upload a file.

Set the option Limit the Submission Item Types that can be uploaded when Task is Submitted: to allow only certain types of file to be uploaded. If you do not select a valid item type, then users cannot upload files when completing this task.

Production Details

This displays the Production Details page.

View All Submissions in Production

Contents: This page lists all submissions where at least one production task has been assigned, or the submission has been assigned to a Schedule Group. Submissions will move out of this folder when the End Production action is used, or if they are associated with a Schedule Group when that group is closed.

Page: 1 of 1 (26 total submissions) Display results per page.

Action	Manuscript Number	Author Name	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
Assign Production Task Production Status Grid Production Details History Transmittal Form File Inventory Edit Submission	JXYZ57	John MacJohn (UNITED KINGDOM)	4(3) - Sep 2007	News and Views	Production Test	May 22, 2006	May 22, 2006	Aug 14, 2007

Production Details for Manuscript Number: JXYZ57, DOI: 10.123/JXYZ-nv-57

[Production Notes](#)
[Production Tasks](#)

DOI:	<input type="text" value="10.123/JXYZ-nv-57"/>
Full Title:	Submitting to a Journal; an assessment of the major on-line submission systems.
Corresponding Author:	Mr John MacJohn Aries Anytown UNITED KINGDOM Proxy
Corresponding Author E-Mail:	trash@ariesvss.com
Author Comments:	
Other Authors:	Jack MacJackson, BSc, Auldreekie University
Article Type:	Production Test
Section/Category:	News and Views
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Status Date:	May 22, 2006
Current Status:	With Editor
Production Status:	In Production
Corresponding Production Editor:	<input type="text" value="None"/>
Schedule Group:	4(3) - Sep 2007
Schedule Group Target Online Publication Date:	Sep 01, 2007
Schedule Group Target Publication Date:	<input type="text" value="Sep 01, 2007"/> (mm/dd/yyyy)
Submission Target Online Publication Date:	<input type="text" value="Aug 14, 2007"/> (mm/dd/yyyy)
Target Volume:	<input type="text" value="4"/>
Target Issue:	<input type="text" value="3"/>
Position:	<input type="text" value="3"/>
Target Number of Pages:	<input type="text" value="14"/>
Target Start Page:	<input type="text" value="1"/>
Target End Page:	<input type="text" value="14"/>
Black and White Image Count:	<input type="text" value="6"/>
Color Image Count:	<input type="text" value="0"/>
Actual Publish Information:	Publish Information

Files:	File Inventory
Production Notes: Top	
Insert Special Character JMJ - 2/21/06: on hold pending updated figures. Contacted by author 3/3/06; said he would be re-sending CD with updated figure files in high-res. TIFF format.	
Transmittal Form:	Link to Transmittal Form
Submission Flags:	Link to Submission Flags
Final Disposition:	Accept
Manuscript Notes: Top	
<input type="checkbox"/> Display Manuscript Notes Flag Insert Special Character	
<hr/> PRODUCTION TASKS: Top	
Description:	Format manuscript
Production Task Status:	Open
Assigned To:	P. Rod Uction Production Controller Proxy
Date Assigned:	May 22, 2006
Date Task Due:	<input type="text" value="06/03/2007"/> (mm/dd/yyyy)
Elapsed Days (since assignment):	0
<hr/>	
Description:	Copy Editing
Production Task Status:	Open
Assigned To:	Charlie Copy-Editor Copy Editor (E) Proxy
Date Assigned:	May 22, 2006
Date Task Due:	<input type="text" value="05/22/2006"/> (mm/dd/yyyy)
Elapsed Days (since assignment):	0
<hr/>	
Description:	Proof checking by Author
Production Task Status:	Open
Assigned To:	John MacJohn Author Proxy
Date Assigned:	May 22, 2006
Date Task Due:	<input type="text" value="05/22/2006"/> (mm/dd/yyyy)
Elapsed Days (since assignment):	0
<input type="button" value="Cancel"/> <input type="button" value="Save and Close"/> <input type="button" value="Additional Manuscript Details"/>	

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “View Production Details”.

History

This displays the normal History page, with the addition of the new Production Status History material, as described in the section “Editorial Manager pages modified by Production Tasks”, above.

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permissions “View Production Status History” and “View Production Correspondence History”.

Transmittal Form

This displays the normal Transmittal form viewable as a link from the main Details screen; this link is available on all main production tracking pages. You may need to do this to review information entered by the journal when setting the Final Disposition before releasing to Production.

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set either of the permissions “View Transmittal Form” or “Edit Transmittal Form Fields”.

File Inventory

This displays the submission files and companion files associated with the submission. Submission files can only be downloaded, but Companion files can be uploaded by users with the correct permissions. You can allow an editor working on peer-review who does not otherwise have access to the Production Tasks to review and download companion files.

Use the Hide and Color Code options to manage the file inventory; Hide allows you to retire older versions of files, ensuring that only the current set of working files is visible; Color Code allows you to tag files, for example to track status or to organise and group files.

File Inventory
John MacJohn (UNITED KINGDOM): "Test 4.0-04-2b part 3"

Listed below are the files included in the current version of the latest Revision of the submission. Click the Download link to download the individual source file. To download a zip file containing multiple items, select the items using the check boxes, and then click the 'Download Zip File' button. The 'Check All' and 'Clear All' links may be used to select or unselect all the files. Additional software (such as WinZip) must be installed on your computer in order to unzip (uncompress) the zip file.



[View Submission](#)

[Check All](#) [Clear All](#)

Submission Files (accessed via PDF)

Item	Description	Item Family	File Name	Size	Last Modified	QC Results	Display on Transmittal Form	Action	Include in Zip File
Original Manuscript (P)	Original Manuscript (P)	Document	text.pdf	4.8 KB	Apr 27, 2006		✓	Download	<input type="checkbox"/>

Companion Files (not built into the PDF)

Color Code	Item	Description	Item Family	File Name	Size	Last Modified	Uploaded By	QC Results	Display on Transmittal Form	Action	Include in Zip File
	<input type="text" value="Corrected Proof (P)"/>	updated	Document	Document.rtf	177 Bytes	May 10, 2006	John MacJohn, Editorial Office		✓	Download Hide	<input type="checkbox"/>
	<input type="text" value="Corrected Artwork (P)"/>	Edited by Art Team	Figure	figure.eps	391.8 KB	May 23, 2006	John MacJohn, Editorial Office		✓	Download Hide	<input type="checkbox"/>

Hidden Companion Files

Item	Description	Item Family	File Name	Size	Last Modified	Uploaded By	Action
Corrected Proof (P)	This is a corrected proof for XYZ . . .	Document	4.04-12b extension.txt	5.1 KB	May 09, 2006	John MacJohn, Editorial Office	Download Restore

[Check All](#) [Clear All](#)

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set either of the permissions “Download Companion Files” or “Upload and Remove Companion files”.

Zip file download

A feature of File Inventory and Assignment files, ZIP file download allows you to select the files you want to download, and Preprint Manager will package them as a ZIP file on demand.

Simply tick the selection box in the “Include in ZIP File” column and click the Download ZIP file button – or click the “Check All” link underneath the Download ZIP file button to select all files for inclusion in the ZIP file.

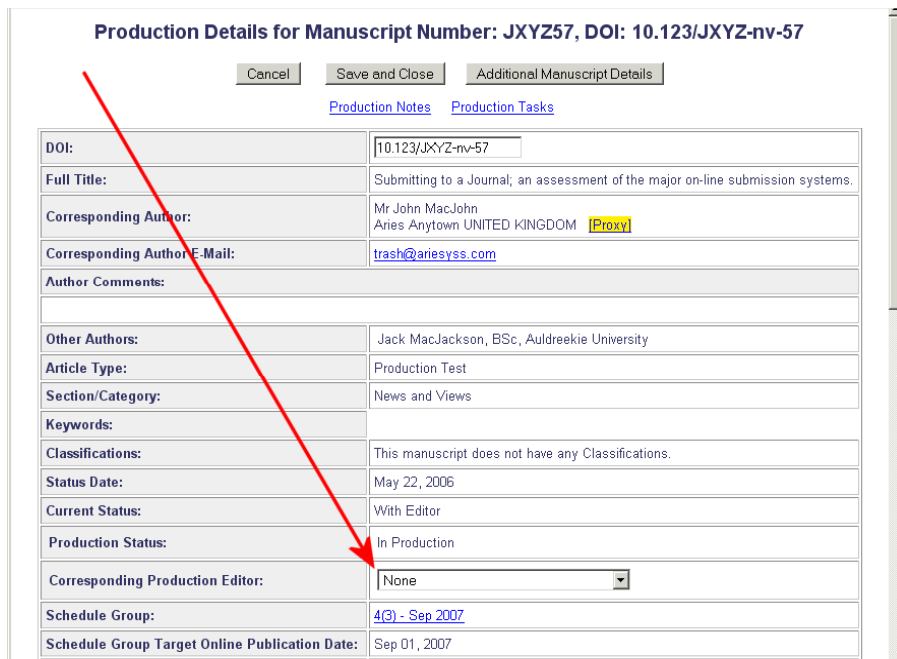
Production Status Grid

This returns you to the production status grid. Depending on the current folder, you will see either the standard production status grid for multiple submissions or a status grid for the current submission only.

Corresponding Production Editor

For any individual submission, you can designate a specific person to be the Corresponding Production Editor for that submission. This allows you to route selected items of correspondence to that person, and also adds a series of mail-merge fields to allow you to include their details in correspondence.

The Corresponding Production Editor is changed on the Production Details page.



The screenshot shows a web form titled "Production Details for Manuscript Number: JXYZ57, DOI: 10.123/JXYZ-nv-57". At the top, there are buttons for "Cancel", "Save and Close", and "Additional Manuscript Details". Below these are links for "Production Notes" and "Production Tasks". The form contains several fields:

DOI:	10.123/JXYZ-nv-57
Full Title:	Submitting to a Journal; an assessment of the major on-line submission systems.
Corresponding Author:	Mr John MacJohn Aries Anytown UNITED KINGDOM Proxy
Corresponding Author E-Mail:	trash@ariesyss.com
Author Comments:	
Other Authors:	Jack MacJackson, BSc, Auldreekie University
Article Type:	Production Test
Section/Category:	News and Views
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Status Date:	May 22, 2006
Current Status:	With Editor
Production Status:	In Production
Corresponding Production Editor:	None
Schedule Group:	4(3) - Sep 2007
Schedule Group Target Online Publication Date:	Sep 01, 2007

TO CONFIGURE:

Identify the types of users who can be designated as Corresponding Production Editors by using RoleManager, Publisher or Editor Role, select the desired Role and set/check the "Serve as Corresponding Production Editor" permission.

Identify the types of users who can choose and change the Corresponding Production Editor for a specific submission by using RoleManager, Publisher or Editor Role, select the desired Role and set/check the "Change Corresponding Production Editor" permission.

Configure any General Letters where responses should be directed or cc'd to the Corresponding Production Editor, and not the general journal address. Use PolicyManager, Edit Letters to Add or Edit such a letter. Select the "Use Corresponding Production Editor's Address" option for the "Sender's E-mail address" setting. This will route any responses to the Corresponding Production Editor when a person hits "Reply-To" in their email program. Optionally, you can select the "Corresponding Production Editor" option for the "Automatic cc:" option.

Configure any Ad-Hoc letters that should be sent directly or cc'd to the Corresponding Production Editor. Use PolicyManager, Edit Letters, and Add or Edit an Ad-Hoc from

Author or Ad-Hoc from Editor Letter. Select the “Corresponding Production Editor” option under the “Recipient” or “Automatic cc:” options.

Use the following mail-merge fields to insert details of the corresponding production editor:

`%CORR_PROD_ED_REALNAME%` - Inserts the Corresponding Production Editor’s full name; it does not use the nickname. Format is Title, first name, middle name, last name.

`%CORR_PROD_ED_TITLE%` - Inserts the Corresponding Production Editor’s Title.

`%CORR_PROD_ED_FIRST_NAME%` - Inserts the Corresponding Production Editor’s First Name.

`%CORR_PROD_ED_MIDDLE_NAME%` - Inserts the Corresponding Production Editor’s Middle Name.

`%CORR_PROD_ED_LAST_NAME%` - Inserts the Corresponding Production Editor’s Last Name.

`%CORR_PROD_ED_DEGREE%` - Inserts the Corresponding Production Editor’s Degree.

`%CORR_PROD_ED_GREETING%` - Inserts the greeting (nickname) field if it is not blank. If blank, it inserts the concatenation of title and last name. (example: Bob or Dr. Smith)

`%CORR_PROD_ED_POSITION%` - Inserts the Corresponding Production Editor’s Position

`%CORR_PROD_ED_ADDRESS%` - Inserts a block address field consisting of the institution, address lines 1-4, city, state, postal code, country.

`%CORR_PROD_ED_DEPARTMENT%` - Inserts the Corresponding Production Editor’s Department.

`%CORR_PROD_ED_INSTITUTION%` - Inserts the Corresponding Production Editor’s Institution.

`%CORR_PROD_ED_ADDRESS1%` - Inserts the Corresponding Production Editor’s Address1.

`%CORR_PROD_ED_ADDRESS2%` - Inserts the Corresponding Production Editor’s Address2.

`%CORR_PROD_ED_ADDRESS3%` - Inserts the Corresponding Production Editor’s Address3.

`%CORR_PROD_ED_ADDRESS4%` - Inserts the Corresponding Production Editor’s Address4.

%CORR_PROD_ED_CITY% - Inserts the Corresponding Production Editor's City.

%CORR_PROD_ED_STATE% - Inserts the Corresponding Production Editor's State.

%CORR_PROD_ED_ZIP_CODE% - Inserts the Corresponding Production Editor's Postal Code.

%CORR_PROD_ED_COUNTRY% - Inserts the Corresponding Production Editor's Country.

%CORR_PROD_ED_EMAIL% - Inserts the Corresponding Production Editor's E-Mail address.

%CORR_PROD_ED_PHONE% - Inserts the Corresponding Production Editor's telephone number.

%CORR_PROD_ED_FAX% - Inserts the Corresponding Production Editor's FAX number.

%CORR_PROD_ED_ROLE% - Inserts the Role name of the Corresponding Production Editor

%CORR_PROD_ED_DESCRIPTION% - Inserts the Editor or Publisher Description (if any) of the Corresponding Production Editor.

Mail-merge Fields for Production Tracking

Providing that Production Tracking is enabled, additional new merge fields are available:

%PROD_STATUS% - pulls the latest production status term related to the manuscript (i.e. 'Not in Production', 'In Production', 'Production Completed', 'Returned to Production').

The following merge fields may be used in letters assigned to the 'Author Reminder', 'Editor Reminder', 'Publisher Reminder', 'Production' families, or assignment letters (these letters do not have a specific family):

%PRODTASK% - Pulls in the name of the Production Task assigned to the recipient relevant to the specific submission.

%PRODTASK_INSTRUCTIONS%- Pulls in any custom instructions associated with the production task (configured on the 'Add/Edit Production Task' page.

%PRODTASK_DUE_DATE%- Pulls in the due date of the Production Task assigned to the recipient for the submission.

%PRODTASK_ASSIGN_DATE% - Pulls in date the task was assigned to the recipient.

%PRODTASK_ASSIGNEDBY% - pulls in the name of the person who assigned the Production Task.

%PRODTASK_ASSIGNEDTO% - pulls in the name of the person to whom the Production Task is assigned.

%PRODTASK_COMPLETED_DATE% - Pulls in the stop date for the task. This date may be the date the task was submitted or the cancellation date.

%PRODTASK_LASTREMINDED_DATE% - Inserts the date on which the recipient was last reminded for the specific task.

%PRODTASK_DAYS_LATE% - Inserts the number of days that a specific Production Task, assigned to the recipient, is beyond the due date.

%PRODTASK_REMIND_COUNT% will insert the number of reminder letters that have been sent to the specific recipient for the specific task.

%PRODTASK_STATUS% - pulls in the status term associated with the Production Task (i.e. Canceled, Open or Completed).

The following merge fields have been added which are not dependent on Production Tracking:

%DOI% - Inserts the contents of the submission's DOI field.

%PROD_NOTES% - pulls in the production notes.

Useful 5.0 Features







These new features are available to both peer-review and production tracking workflows, and you may find them useful. They are described in the general Editorial Manager 5.0 release notes.

Customized Flags

View All Submissions in Production

Contents: This page lists all submissions where at least one production task has been assigned, or the submission has been assigned to a Schedule Group. Submissions will move out of this folder when the End Production action is used, or if they are associated with a Schedule Group when that group is closed.

Page: 1 of 1 (26 total submissions) Display 100 results per page.

Action	Manuscript Number	Author Name	Schedule Group	Section/Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
Assign Production Task Production Status Grid Production Details    	JXYZ54	John MacJohn (UNITED KINGDOM)			Production Test	Apr 27, 2006	Apr 27, 2006	
Assign Production Task Production Status Grid Production Details  	JXYZ55	John MacJohn (UNITED KINGDOM)			Production Test	Apr 27, 2006	Apr 27, 2006	


This feature allows you to display small icons by each Submission's Details and Production Details links, alerting you to special submissions. Examples of their use in Production Tracking include:

- Indicating "fast-track" submissions
- Indicating submissions which are "on hold"
- Indicating submissions with images suitable for the printed issue cover
- Indicating submissions with companion papers

Additional Manuscript Details

Additional Manuscript Details for Manuscript Number JXYZ54
"Test 4.0-04-2b part 3"

Cancel Save and Close

Publish with	DOI-10.1234/65432	Help
Schedule type	Fast-Track	
MS Editor	AV	
News and Views ready date	07/20/2006  (mm/dd/yyyy)	

Cancel Save and Close

This feature allows you to create new metadata fields to store any information not covered by the standard Editorial Manager or Preprint Manager fields. These fields are accessed from the main Details and Production Details pages.

You can combine them with customized flags to store important data and alert users to its presence. For example:

- Create an Additional Manuscript Detail field called "Publish With".
- Create a Customized Flag called "Publish With".

If you use the Additional Detail field to type in the number of a companion paper, you also set the customized flag so you're aware that the submission is dependent on other submissions.

Example: Configuring a Copy-Editing stage before Transmittal

This assumes that you are running a journal that wants to use Production Tasks to assign each accepted submission to a Copy Editor before sending it to the publisher via the normal Transmittal process.

This is currently difficult to track within Editorial Manager as you cannot assign a submission to an Editor after the author has been notified of the decision. As Production Tasks are independent of peer-review, this can be handled easily.

The key characteristics of this configuration are:

- There is a single task to track, and scheduling is unnecessary.
- There will be only a single copy-editor role required in addition to the normal journal editors.
- The copy-editor requires minimal information; just the ability to download the file, and upload the results to the journal.
- The administrator will assign the submission to the copy-editor

Configuration

Assuming that Production Tasks have been enabled for the journal, configuration is as follows:

In RoleManager, give the journal administrator the permissions:

- Initiate Production
- End Production
- View all submissions in Production
- View Production Details
- Assign Production Task
- Cancel Production Task Assignment
- Override Production Task Due Date

In RoleManager, create a new Publisher Role "Copy Editor". Give this role the single permission:

- Receive Production Task

Proxy-register the copy-editor and assign the new publisher Role to the record.

In PolicyManager, use Edit Submission Items to create a “Copy-Edited Text” item type. Set this to have the PDF handling “Companion File (not built into the PDF)”. There is no need to change any article type settings.

In PolicyManager, use Edit letters to create three new production task templates for:

- Assigning a submission to the Copy Editor
- Cancelling a Copy-Editing Assignment
- Notifying the journal office of a completed copy-editing assignment

In PolicyManager, use Configure Production Tasks to add a new production task, “Copy Editing”. Configure this as follows:

- Can be Assigned by: Journal Administrator
- Can be Assigned to: Selected Editor/Publisher Roles only: Copy-Editor
- Check the Show Warning if File not uploaded when Task is Submitted setting
- Due date: Check the Number of Days after Assignment Date: option, and set a default duration, e.g. 3 days.
- Set the Letter options, selecting the three letters just configured.

Use

In practice, the new copy-editing process is:

- The author is notified of the decision.
- The journal administrator locates the submission in All Submissions with Editor’s Decision.
- The administrator opens Details, and clicks Assign Production Task to assign the production task to the copy-editor, selecting the files that need to be copy-edited.
- The Copy-Editor receives an email notification.
- The Copy-Editor logs into the system and downloads the files assigned to them.
- When editing is complete, the Copy-Editor logs into the system and clicks “Submit Task”; using the “Upload Companion Files” to attach the new files to the submission.
- The administrator receives notification via email.
- The administrator locates the submission and sets the Final Disposition and goes through transmittal as before, selecting the copy-edited files to go to the publisher.

- The administrator locates the submission in “All submissions in Production” and uses “End production” to move the submission out of the “All submissions in Production” folder.

This is a very simple process. To manage the copy-editing, the administrator can use the “Production Tasks I have Assigned” folder to review submissions and have overdue tasks highlighted in red.