EEMUG 2020
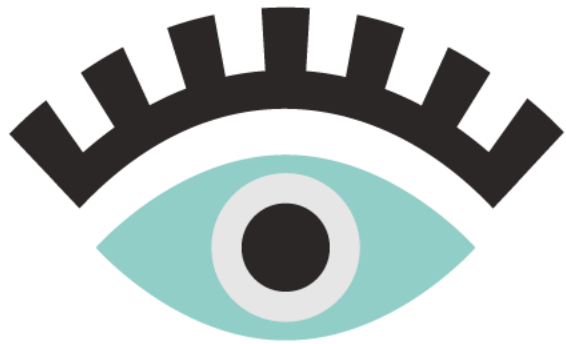
#EEMUG2020

Task Manager Overview

Be the master of your tasks

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EEMUG 2020

#EEMUG2020

Agenda

- What is ProduXion Manager?
- Production Tasks – The Basics
- Initiating Production and Assigning Tasks in PM
- Challenges
- What is Task Manager?
- Task Manager Use Cases
- Task Manager Action Links and Folders
- Task Manager Configuration Options

What is ProduXion Manager?

- Companion product to Editorial Manager
- Offers a set of features that allow publications to manage activity outside of the peer-review workflow
- Uses Tasks to track and manage assignments to internal staff, outside vendors, and freelancers
- Intended for production work, but can be adapted for pre-production "task" work

All About Tasks

- Used to assign a submission to a person for processing
- Configuration controls who can assign or complete each task
- Set due dates for each task within the workflow
- Can be triggered automatically when preceding tasks are completed

- Choose which files are automatically sent as part of the assignment
- Allow recipients to upload new files
- Automatically record dates for each task/activity
- Update "production status" of submission based on task status

Initiating Production and Using Tasks in PM

Initiating Production

- Usually happens after acceptance…

- …but can actually take place at any time

Editor 'To-Do' List

My Pending Assignments (25)
- New Submissions (18)
- Revised Submissions (0)
- New Submissions Requiring Assignment (2)
- Revised Submissions Requiring Assignment (0)
- Submissions Sent Back to Author for Approval (1)
- New Assignments (0)
- Submissions with Required Reviews Complete (1)
- Submissions Requiring Additional Reviewers (0)
- Submissions with One or More Late Reviews (0)
- Submissions with Active Discussions (3) ❶

Reviews in Progress (0)
- Reviewers Invited - No Response (0)
- Submissions Under Review (0)

Initiating Production

- Usually happens after acceptance…

- …but can actually take place at any time

Assigning Schedule Group

- Submissions can be assigned to a Schedule Group (issue) when production is initiated

- Requires "Allow Task Assignment and Assignment to Schedule Group" RoleManager permission

Initiate Production and Assign Production Task
for Manuscript Number: DEMOJES141-D-18-00039
Bea Arthur (UNITED STATES) : "Low atmosphere drifting balloons: platforms for environment monitoring and forecast improvement"

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:	Do not assign to Schedule Group
Submission Target Online Publication Date:	08/01/2018 (mm/dd/yyyy)

Cancel   Proceed

Assigning Schedule Group

□ **ProduXion Manager**

- ☑ 🔴 Create Submission
- ☑ 🔴 Initiate Production Manually
- ☑ 🔴 Allow Task Assignment and Assignment to Schedule Group when Initiating Production
- ☑ 🔴 Serve as Corresponding Production Editor
- ☑ 🔴 Change Corresponding Production Editor

**Initiate Production and Assign Production Task
for Manuscript Number: DEMOJES141-D-18-00039
Bea Arthur (UNITED STATES) : "Low atmosphere drifting balloons: platforms for environment monitoring and forecast improvement"**

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:	Do not assign to Schedule Group ▾
Submission Target Online Publication Date:	08/01/2018 📅 (mm/dd/yyyy)

Cancel   Proceed

Assigning First Task

- You can choose to:
    - Proceed without assigning a task
    - Manually assign a task
- A task can also be configured to automatically assign when production is initiated

Assign Production Task For Manuscript Number: DEMOJES141-D-18-00039
Bea Arthur (UNITED STATES): "Low atmosphere drifting balloons: platforms for environment monitoring and forecast improvement"

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.

To initiate production without assigning a production task, click the 'Proceed Without Selecting a Task' button.
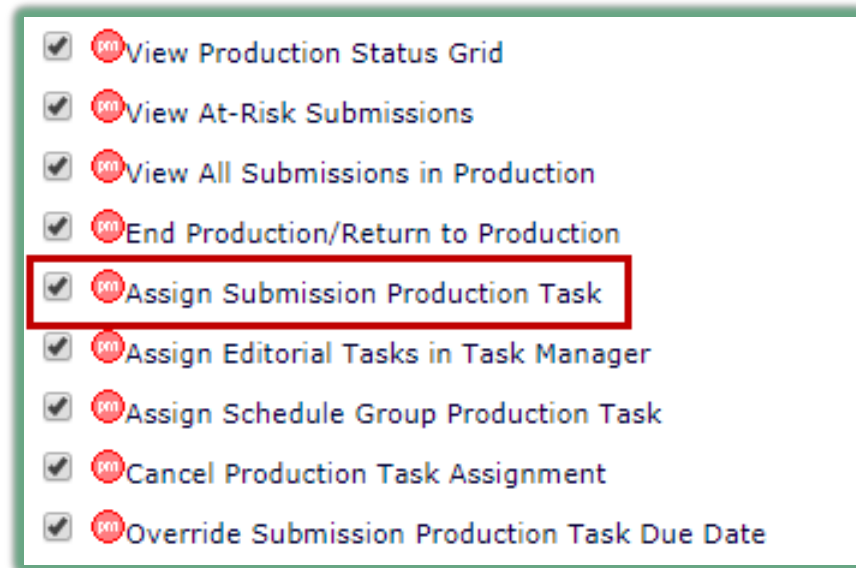
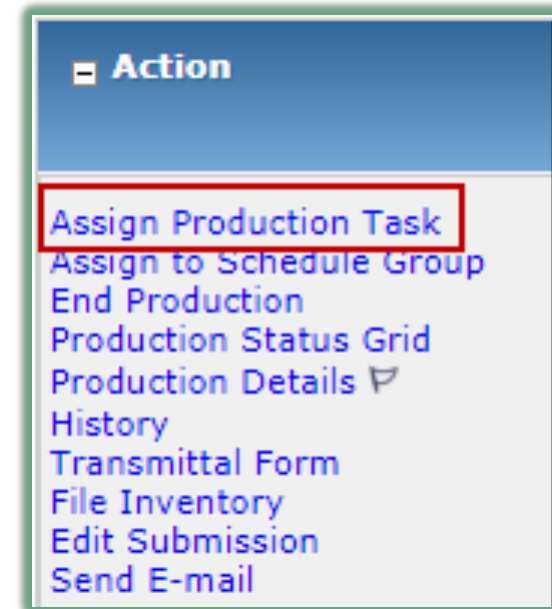|	
Schedule Group:	No Schedule Group Assigned
Production Task:	Author Welcome Kit

Cancel Proceed with Selected Task Proceed Without Selecting a Task

Who assigns tasks?

- Properly permissioned Editors and Publishers
- Tasks can also be triggered by completion of other tasks

Challenges

Challenges for Editorial Tasks

- Editorial and Production "task" work is performed by different teams

- Pre-acceptance and post-acceptance manuscripts displayed in same menus/folders

- Production-specific terminology may not apply to editorial task work

- Tasks may be running on submissions that are not yet accepted for publication

- Production stats (eg turnaround times) become inaccurate

Introducing TaskManager

- Features from ProduXionManager
- Allows a parallel process while peer review is ongoing – the performance of pre-production task work
- Allows for multiple export points (eg, to FTP)
- Automatically available to all current PM users
- Available as a separate feature to customers not currently using PM

Introducing TaskManager

- No need to Initiate Production
- Maintain separate workflows for Editorial and Production tasks
- Keep Editorial and Production Tasks on separate teams
- Keep terminology familiar to users
- Keep Editorial and Production separate in reporting

For example…

- Editorial Staff: can access all submissions in Task Manager but cannot see submissions in production

- Production Staff: can access all submissions in production but cannot see submissions in Task Manager

- Managing Editor/Admin role: can access both submissions in Task Manager and submissions in production; sees "the whole picture"

- Each role sees **only** the folders and terminology that is relevant to the work for which the role is responsible

Views by Role

- Managing Editor:

Overview

View All Submissions in Task Manager (4)
Production Initiated – No Tasks Assigned (1)
Submission Tasks I Have Assigned (3)
View All Submissions in Production (4)
View All Production Tasks With Authors (1)
Production Status Grid

- Production Manager:

Overview

Production Initiated – No Tasks Assigned (1)
View All Submissions in Production (4)
View All Production Tasks With Authors (1)
Production Status Grid

- Editorial Coordinator:

Overview

View All Submissions in Task Manager (4)

External Contacts and Vendors

- Vendors often do not need the same level of access as other users, so their permissions may be restricted
- If submitting a task by FTP, they may never need to log into a site

To-Do List

Submission Tasks Assigned to Me (1)

Schedule Group Tasks Assigned to Me (0)

Submission Tasks Assigned to Publisher Vincent Vendor

Page: 1 of 1 (1 total tasks)

⊟ Action ▲	Manuscript Number ▲▼	Author Name ▲▼
View Assignment Letter Submit Task	DEMOHW-D-19-00043	Bobby Bob Bob (BAHAMAS)

Page: 1 of 1 (1 total tasks)

Working with Editorial Tasks

Sample Editorial Tasks

- Transferring a file to an online preprint server
- Assigning submission to staff to check copyright questions/forms
- Assigning submission to a vendor for artwork checking/pre-processing
- Transferring submission to a language editing service
- Transferring submission to a taxonomy or semantic enrichment service
- Transferring to a copyeditor/vendor/other 3rd party service provider

Assigning an Editorial Task

Action	Manuscript Number	Article Type	Article Title	Author Name
View Submission Duplicate Submission Check (50%) Details ⚐ Initiate Discussion History Submit Early Decision Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition **Assign Editorial Task** Initiate Production Similar Articles in MEDLINE Send E-mail Linked Submissions Search in Google.com	DMITRIDEV160-D-19-00056	Original Article	A Very Good Article	Abigail Author ⚐

Assigning an Editorial Task

- Available when:
  - User has "Assign *Editorial* Tasks" RoleManager permission
  - Submission's Article Type has a Task Manager Workflow
  - Submission is not yet in production
  - Submission has not yet received a final disposition

Assigning an Editorial Task

- Tasks are selected from the "Task Manager Workflow" assigned to the Article Type

Assign Task For Manuscript Number: DMITRIDEV160-D-19-00056, DOI: Unassigned
Abigail Author (BAHAMAS): "A Very Good Article"

Select the task you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear.

Task: Preprint Server Deposit ▾

Cancel   Proceed with Selected Task

Assigning an Editorial Task

Assigning an Editorial Task

- Select submission files to include in assignment

Action Links and Folder Views

Main Menu

- **New** "View All Submissions in Task Manager" folder
- Some existing folders reused for Task Manager:
  - Submission Tasks Assigned to Me
  - Submission Tasks I Have Assigned
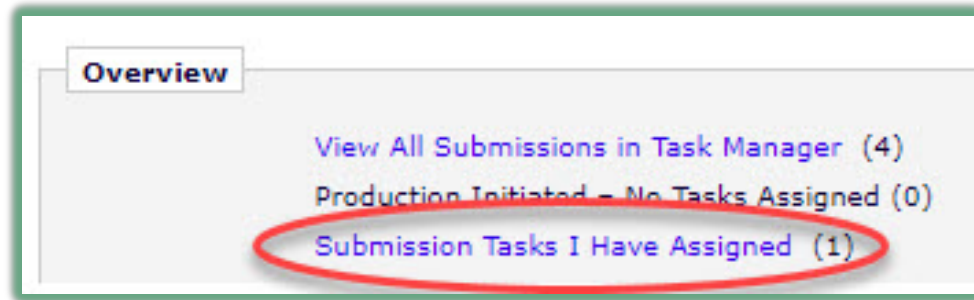
Submission Tasks I Have Assigned

Overview

View All Submissions in Task Manager (4)
Production Initiated – No Tasks Assigned (0)
Submission Tasks I Have Assigned (1)

- Users can cancel or reassign tasks they previously assigned.
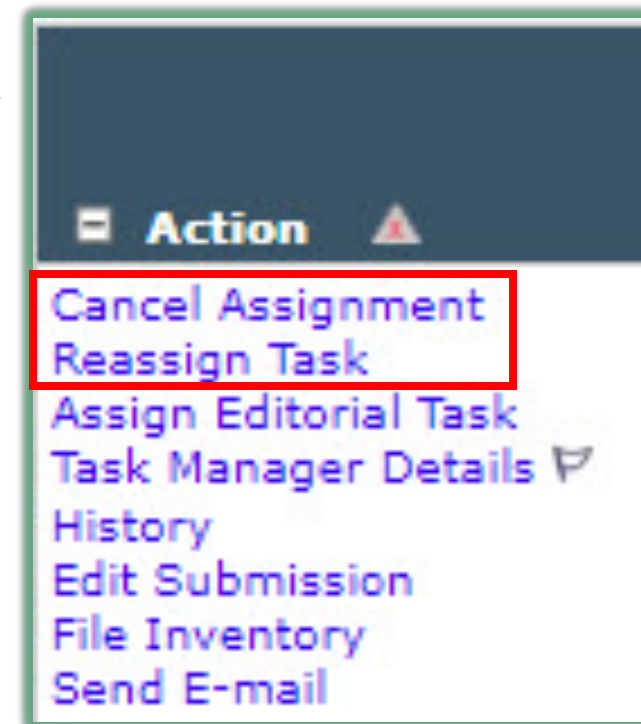

- **Action** ⚠

Cancel Assignment
Reassign Task
Assign Editorial Task
Task Manager Details ⚐
History
Edit Submission
File Inventory
Send E-mail

Submission Tasks Assigned to Me

To-Do List

Submission Tasks Assigned to Me (3)

- TM tasks can be viewed, re-assigned and submitted here

Action	Manuscript Number	Author Name	Article Title	Production Status	Task
View Assignment Letter **Submit Task** Reassign Task Assign Editorial Task Task Manager Details ⚐ History Edit Submission Send E-mail	DMITRIDEV151-D-18-00044	Abigail Author (BAHAMAS)	Test		Language QC
View Assignment Letter Assignment Files **Submit Task** Reassign Task Assign Production Task Change Schedule Group Production Details ⚐ History Transmittal Form Edit Submission Send E-mail		Amy S Author (UNITED STATES)	Demo		Image QC

View All Submissions in Task Manager

- Contains all submissions undergoing Editorial task work

Ending Task Manager

- Can be done manually using "End Task Manager" link
- Available when no TM tasks are pending
- Removes submission from "View All Submissions in Task Manager" folder
- Can occur automatically when:
  - a task is completed
  - production is initiated
  - final disposition is set

History

- New "Task Manager Status" column indicates when editorial task work was performed.

- Only displays for submissions on which Task Manager has been initiated.

History

- Labels indicate which tasks were assigned as part of Task Manager

- Letters sent at task assignment and completion are recorded in Correspondence History

Details

- Labels on the Details page indicate which tasks were assigned in Task Manager

Configuration Options

RoleManager: 1

- A new role permission controls access to Task Manager

- Grants access to:
  - "View All Submissions in Task Manager" folder
  - "Assign Editorial Task" link
  - "End Task Manager" link
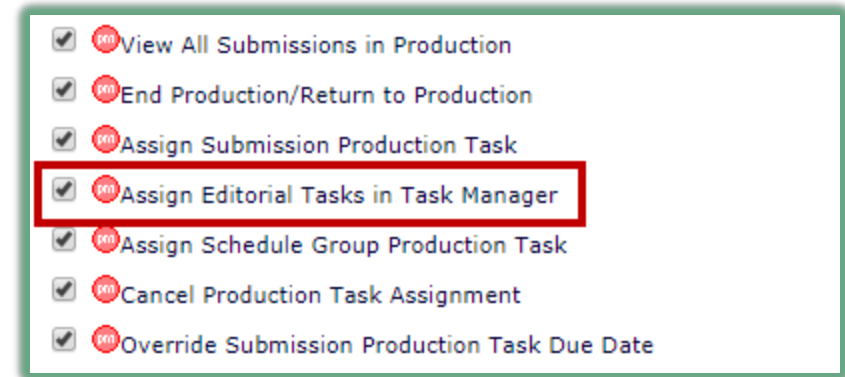
RoleManager: 2

- Existing PM permissions allow users to see status, assignment, and correspondence histories
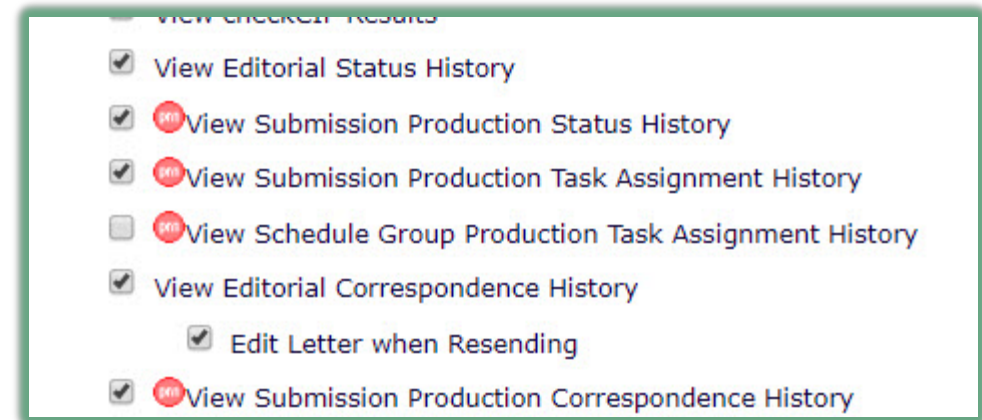
Define Details Page Layouts

- A details page layout can be configured for roles that will be performing editorial task work
- Configured in PolicyManager…
- …assigned to a role in RoleManager

General Policies

Set Manuscript Number Type
Set Manuscript Number Revision Suffix
Set Date Format
Set Time Zone Display Policy
Configure Unavailability Check and Instructions
Configure Identity Confidence Check
Set ISO Country Standard
Configure General Due Date Preferences
Set Reviewer Preferences
Configure Electronic Calendar Due Date Preferences
Set Editor Deep Link Expiration
Set Enterprise Analytics Reporting Deep Link
Define Details Page Layouts
Set Update Information Deep Link Expiration
Create Customized Submission Flags

Define Details Page Layouts

- A details page layout can be configured for roles that will be performing editorial task work
- Configured in PolicyManager…
- …assigned to a role in RoleManager

Details Page Layouts

on each user can see. After defining a custom Layout, use RoleManager to sel
rently selected for use by any role. Use the **Copy** link to create a new Layout

Default Layouts

Default Editorial   Copy
Default Proposals   Copy
Default Production   Copy

User-Defined Layouts

Editorial Task Staff Layout   Remove   Edit   Copy
Editorial Task Vendor Layout   Remove   Edit   Copy

Add New Layout
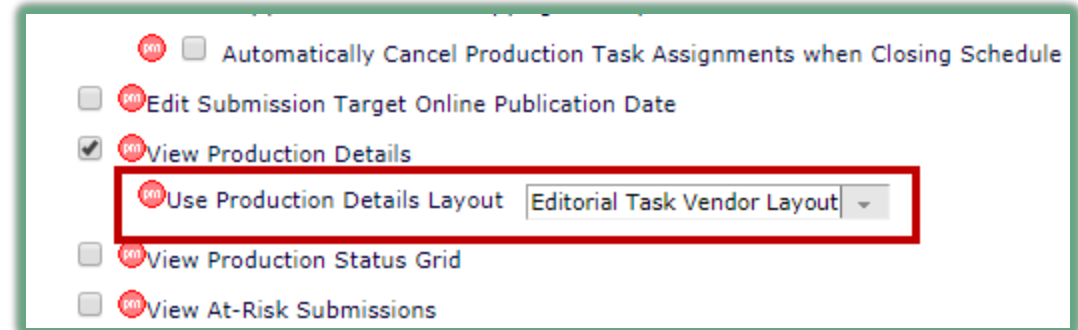
Return to PolicyManager

Define Details Page Layouts

- A details page layout can be configured for roles that will be performing editorial task work

- Configured in PolicyManager…

- …assigned to a role in RoleManager

Production Statuses in Task Manager

- The use of Production Statuses is also possible in Task Manager
- Allows you to give a status to your editorial tasks/activities in progress

⊟ Action	Manuscript Number	Author Name	Article Title	Article Type	Initial Date Submitted	Date Task Manager Initiated	Production Status
View Submission Assign Editorial Task Initiate Production Task Manager Details ⚑ History File Inventory Edit Submission Similar Articles in MEDLINE Send E-mail Linked Submissions	DEMOHW-D-18-00014	mary mary ⚑ ▬ (UNITED STATES)	Leaves: an appreciation	Original Study	31/10/2018	17/01/2020	Editorial: Figures with Studio

Creating Production Statuses

- Go to PolicyManager > ProduXion Manager > Configure Production Statuses

- Click Add to create a new status

Production Status Configuration

- Click 'Edit' to configure the status
- Check "Record in History" to ensure History lists the date
- The status rules govern when a status is shown

Production Status Name: Editorial: Figures with Studio

Maximum Production Status Name is 100 characters

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

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

☑ Record in History

Status Rules

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

(		Criterion		Is/Is not		Selector		Value		)	
	▾	Figures to Studio In Progress	▾	is	▾	Equal To	▾	True	▾		▾

Add

Configuring a Task Manager Workflow

- Task Manager workflows are configured in the same place as Production workflows
- All workflows are constructed from the same pool of tasks
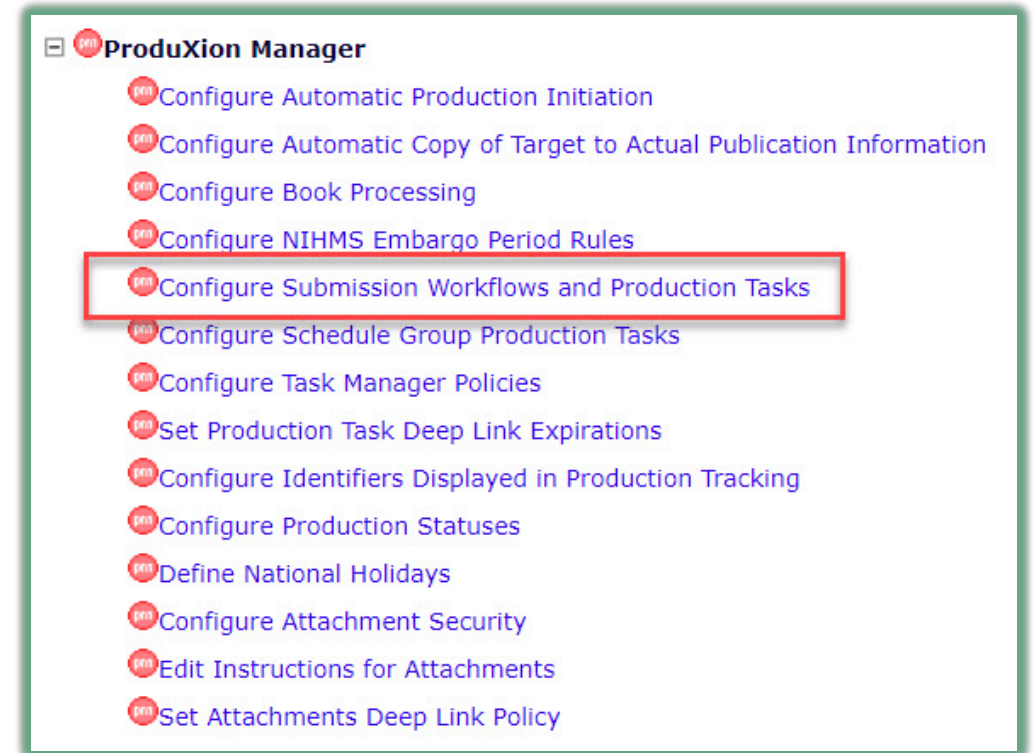
Configuring a Task Manager Workflow

Configure Submission Workflows and Tasks

Listed below are previously created Submission Workflows, including the system-defined 'All Submission Production Tasks' workflow; edit this workflow to define new Task Types, or remove/hide unwanted ones.

You may Add, Edit or Remove your own Custom Workflows. All Workflows define a set of Submission Production tasks and the relationships between them, such as the order of Tasks and Trigger Task links for Automatic Assignment. To use any Workflow, it must be associated with the appropriate Article Types via the *Edit Article Types* page; Task Assignment for submissions of these Types is then limited to tasks in the Workflow.

Standard

All Submission Production Tasks   Copy   Edit

Configuring a Task Manager Workflow

- This is what a task library looks like: click [Edit] to configure tasks and 'Add New Task Type' to create new workflow tasks

Order	Task Type (◆=Milestone)	Assign if First Task ⓘ		Trigger Task(s) ⓘ	Allow Repeats ⓘ
1	Figures to Studio [Edit]				
2	Licence agreement [Edit]				
3	Ethics Check [Edit]		✏	Licence agreement	✔
4	Files to Vendor [Edit]				
5	First Proofs to Author [Edit]				
6	Proofs Received from Author [Edit]				
7	Corrected Proofs to Vendor [Edit]		✏	Proofs Received from Author	✔
8	Figures finalised [Edit]				
9	Final Proofs to Author [Edit]				

Insert Special Character

＋ Add New Task Type

Maximum Production Task Name is 100 characters

Configuring Tasks: a note

- Some configurations in the following slides are not relevant to Task Manager in your task set-up, because they are specific to ProduXion Manager…

- …that being so, I will show which sections can be configured and are relevant to Task Manager in purple boxes. That way you can be sure (when you refer back to this presentation later) that you know what your possibilities are!

Configuring the Task: Naming It

Edit Submission Production Task

Cancel   Submit

Insert Special Character

New Production Task Name: Figures to Studio

Maximum Production Task Name is 100 characters

☐ **Hide**   When you **Hide** a Production Task Name, the Production Task Name will be deactivated (not available for assignment).

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

☐ Assign Automatically when Production is initiated (if this is the first task in the workflow)

☐ Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)

Configuring the Task: Automatic Assignment

Task Manager Automatic Assignment Options

If this task is configured as a part of the Task Manager Workflow for an Article Type, the following events can be configured to automatically assign the task.

☐ Assign automatically at new submission
☐ Assign automatically at revision
☐ Assign automatically when author returns submission to publication
☐ Assign automatically when editor edits and approves submission

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

☐ End Production/Task Manager Automatically after this task is Completed

- Editorial tasks can be automatically triggered by certain workflow events
- The task needs to be configured as part of the Article Type's Task Manager workflow

Configuring the Task: 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

Only roles with the "Assign Production Task" permission appear in this list. You may select multiple roles or de-select a role by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). If the task is configured for Automatic Assignment, you must select a single person who will be the sender for all tasks assigned automatically.

Can be Assigned by:

Managing Editor
Production Manager
Review Editor
Studio
Vendor

Can be Assigned to:

○ Corresponding Author only
● Selected Editor/Publisher Roles only

Only roles with the "Receive Production Task" permission appear in this list. You may select multiple roles or de-select a role by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). If the task is configured for Automatic Assignment, you must select a single person to be the recipient of all such tasks assigned automatically.

Managing Editor
Production Manager
Review Editor
Studio
Vendor

Configuring the Task: Auto-Select Files

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

☑ Automatically Select Files for Assignment

Configure the Item Types for automatic selection. You may select multiple Item Types or de-select an Item Type by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). Important Note: if the task is an FTP task requiring a File on assignment, and the Task is configured to be Assigned Automatically, you must select an item here for the task to ever be assigned.

[System-Generated PDF]
Cover page
Manuscript
Figure
Table
Dataset
Supplementary Material

This list is populated from the submission items that you have created in **PolicyManager > Submission Policies > Edit Submission Items**

Configuring the Task: Follow-on Tasks

Follow-on Task Assignments allow the selected editors/publishers who complete this kind of task to immediately assign another task. Remember to configure the **Can be Assigned by** permissions for the tasks you wish to follow-on from this one.

☑ Allow follow-on Task Assignments

This permission allows the task recipient to reassign the same task to another user. The recipient must have a publisher or editor role (corresponding authors may not reassign tasks), but it does not need to be one of the **Can be Assigned by** roles for this task.

☐ Allow Recipient to Reassign

Configuring the Task: FTP Options

FTP Options

Submission Production Task Transmittal Method:

JATS 1.2A Production Task Export ▾

☐ Allow task assignment and FTP without Assignment Files
☐ Include Aries Import XML file in transmittal

What gets sent out ➡ ☐ FTP task without go.xml file
☐ Use Manuscript Number for file names

Secure FTP Server address
(e.g. sftp://ftp.ariessys.com[:21]): sftp://ftp.ariessys.com

Username test

Password demo

Subdirectory: folder

Email Address (for transmittal notification): taskmanagernotifications@trash.co

Submission Production Task Import Profile: None ▾

Email Address (for import notification):

What gets sent back in ➡ ☐ XML file is required
Select Fields for Import

Configuring the Task: Companion Files

Companion File Options

☑ Show Warning if File not uploaded when Task is Submitted
☑ Allow assigned companion files to be replaced when submitting the task
☑ Limit the Submission Item Types that can be uploaded when Task is Submitted:

   Only Item Types configured as Companion files appear in this list. You may select multiple Item Types or de-select an Item Type by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). Important Note: if this task is configured with a Production Task Import Method, one and only one Item Type may be selected from this list. Companion files submitted via FTP for this kind of task will automatically be assigned this Item Type.

   Figure Proofs ▲
   ICMJE form
   Proofs
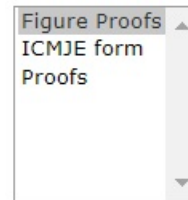
Configuring the Task: Due Date

Due Date:

- ○ Task is a Milestone Task (no due date required)
- ● Calculate a Due Date based on:
  - ☑ Number of Days after Assignment Date: `7`
  - ☐ Number of Days prior to Submission Target Online Publication Date: `0`
  - ☐ Number of Days prior to Schedule Group Target Online Publication Date: `0`
  - ☐ Number of Days prior to Schedule Group Target Publication Date: `0`

- Entering the time allowed for the task to be completed allows you to keep everything on track

Configuring the Task: Letters

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. Batch Assignment Letters are only used by Task Types configured with 'Allow Batch Assignment', and only when the task is selected for Batch Assignment; when such a task is assigned as a single task, manually or automatically, the configured non-Batch Assignment Letter is used.

☐ Allow Task Assignment without Sending Letter

Non-Batch Assignment Letter:	Assign production task ▼
Batch Assignment Letter:	Assign production task ▼
Cancel Assignment Letter:	Production Task cancelled ▼
Submit Task Letter:	Production Task submitted ▼

Cancel   Submit

Configuring the Task Workflow: 1

Standard

All Submission Production Tasks   Copy   Edit

Custom Submission Workflows

Task Manager Workflow   Copy   Edit

Insert Special Character

New Custom Workflow Name: | e.g. My new Task Manager workflow | Add
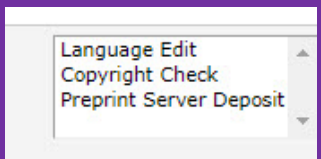
Maximum Workflow Name is 100 characters
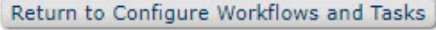
Configuring the Task Workflow: 2

- Choose your task(s) and click **"+ Add Selection(s) to Workflow"**

Setting up Automation

- Automation can save journal office time

- Example: when the 'Language Check' task has been submitted, the 'Copyright Check' task can be set up to trigger automatically

- Useful when one task follows another and does not any manual checks inbetween

Setting up Trigger Tasks

	Order	Task Type (◆=Milestone) ⓘ	Assign if First Task ⓘ		Trigger Task(s) ⓘ	Allow Repeats ⓘ
🗑	1	Language Edit [Edit]				
🗑	2	Copyright Check [Edit]		✎	Language Edit	
🗑	3	Preprint Server Deposit [Edit]		✎		

Return to Configure Workflows and Tasks

	Order	Task Type (◆=Milestone) ⓘ	Assign if First Task ⓘ		Trigger Task(s) ⓘ	Allow Repeats ⓘ
🗑	1	Language Edit [Edit]				
🗑	2	Copyright Check [Edit]		✎	Language Edit	
🗑	3	Preprint Server Deposit [Edit]	Yes	💾 ↩	Language Edit ▲ Copyright Check ▼	◉ No ○ Yes

Return to Configure Workflows and Tasks

Repeats

- 'Allow Repeats' gives you the ability to repeat tasks in the workflow. Completing the same trigger task will re-assign the task again

| Figures to Studio [Edit] | | 💾 ⬅ | Obtain Proof of Figure Permissions ⇕ | ○ No |
| | ● Yes | | | ● Yes |

Milestone Tasks

- A milestone task, denoted by a diamond in your task library, is a task that opens, then shuts itself again immediately

- An example use of a milestone task is when you are sending a task out, but are not expecting anything back – like a Preprint server deposit

◆Task Manager MECA Preprint deposit [Edit]
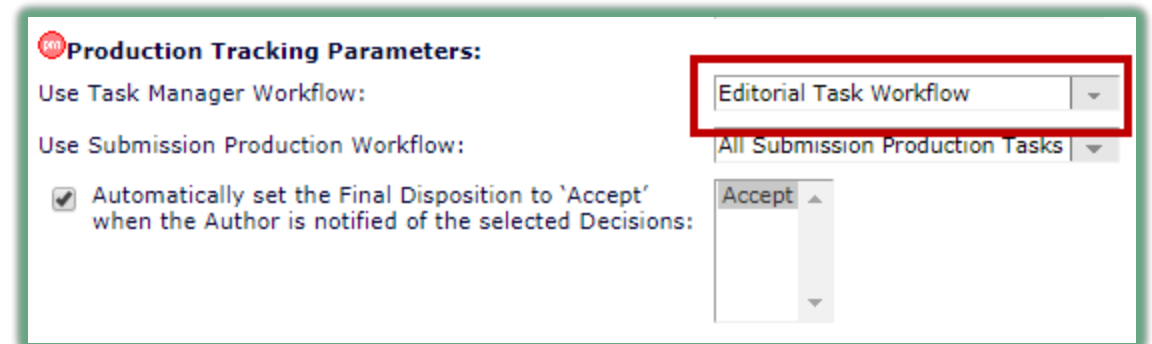
Due Date:

◉ Task is a Milestone Task (no due date required)

Select Task Manager Workflow

- Any task workflow can be set as the "Task Manager Workflow" within the Article Type configuration

- Set to "None" to suppress editorial task assignment on an Article Type

Automatically End Task Manager

- A task can be configured to automatically end Task Manager at completion

- A site can be configured to automatically end Task Manager when Production is initiated, or Final Disposition is set

- Task Manager will only end if no tasks are open

Automatically End Task Manager

- A task can be configured to automatically end Task Manager at completion

- A site can be configured to automatically end Task Manager when Production is initiated or Final Disposition is set

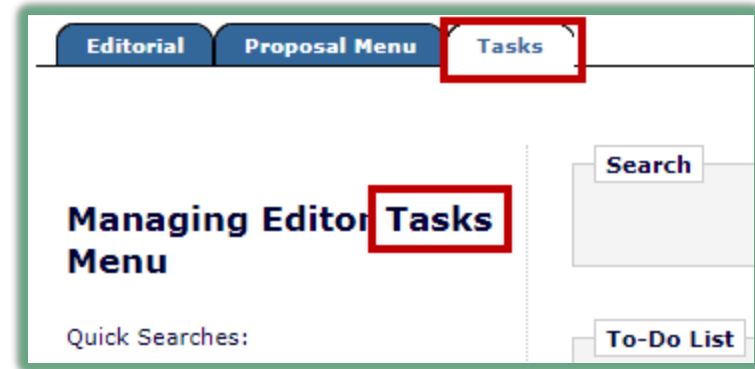- Task Manager will only end if no tasks are open

Using "Task Manager" Labels

- Existing production-specific text may not be applicable for staff/vendors performing editorial task work

- A new RoleManager permission will re-label some production-specific terminology throughout the UI

- Task assignment pages for tasks assigned in Task Manager are also re-labelled
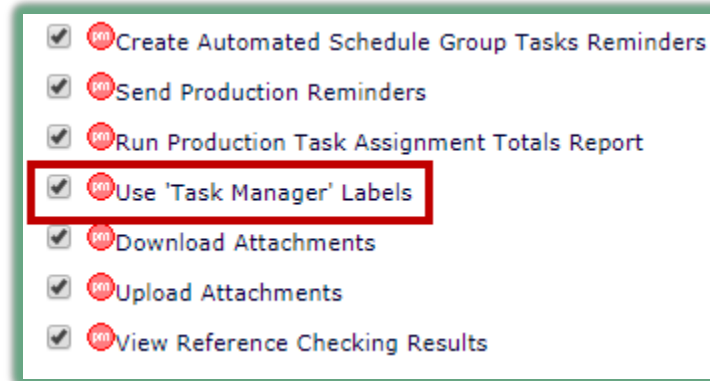
Using "Task Manager" Labels

- "Production Tasks" tab and menu are re-labelled to "Tasks"

- "Production Details" become "Task Manager Details"

Task-Related Letters: 1

- There are three letters you might need for a task:
  - Editorial Task Assignment Letter: sent to the person to whom the task is assigned
  - Editorial Task Cancellation Letter: sent to the person to whom the task is assigned, if the task is cancelled
  - Editorial Task Submission Letter: sent to the person who assigned the task once the task is completed
- None of these letters are *required* – but using them is a good idea, unless your journal staff are always logged into EM

Task-Related Letters: 2

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. Batch Assignment Letters are only used by Task Types configured with 'Allow Batch Assignment', and only when the task is selected for Batch Assignment; when such a task is assigned as a single task, manually or automatically, the configured non-Batch Assignment Letter is used.

☐ Allow Task Assignment without Sending Letter

Non-Batch Assignment Letter: Editorial Task Assignment ▼

Batch Assignment Letter: Please Choose a Letter ▼

Cancel Assignment Letter: Cancel Task Assignment ▼
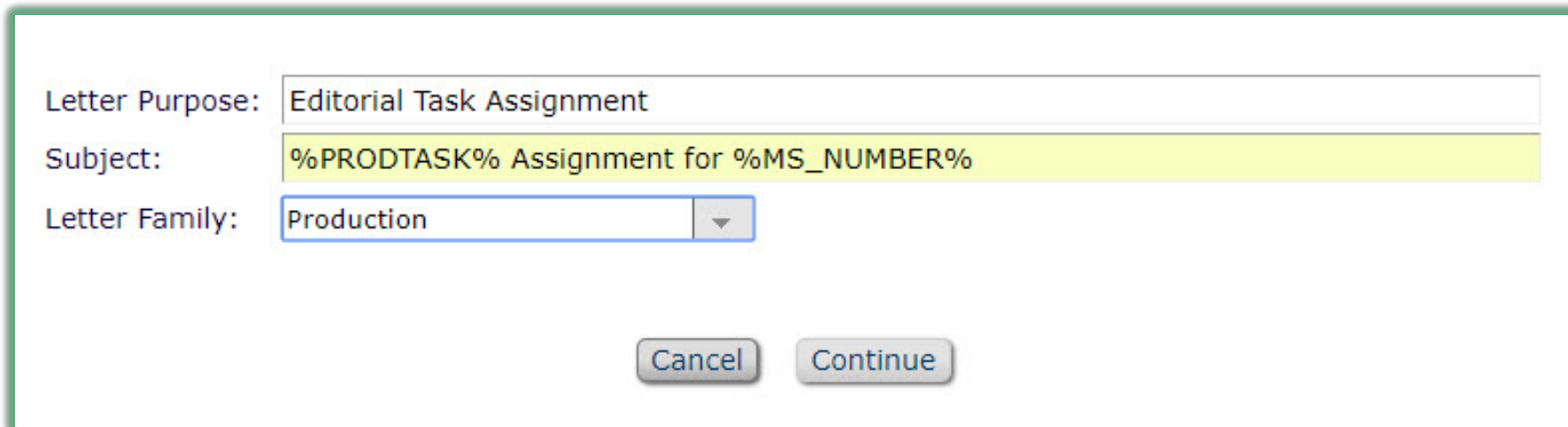
Submit Task Letter: Editorial Task Finished ▼

Task-Related Letters

- PolicyManager > Email and Letter Policies > Edit Letters
- Create all task-related letters in the Production Letter Family
- Use ProduXion Manager merge fields
- **Tip:** start letter purpose with the word "Editorial" to distinguish from production task letters

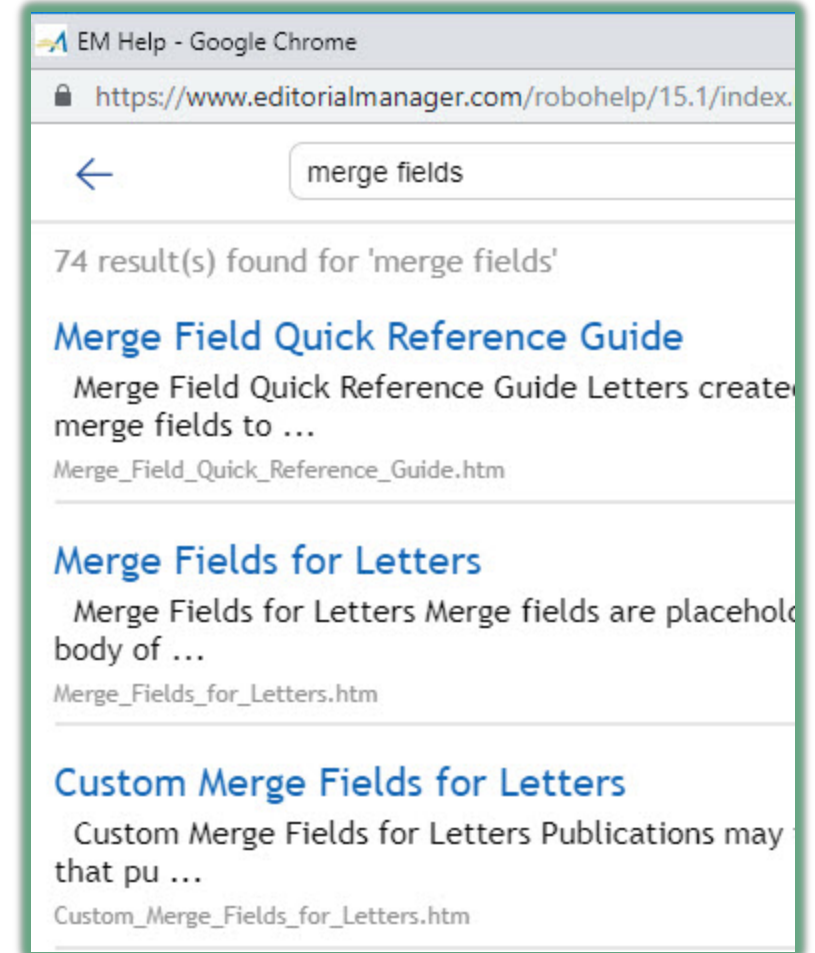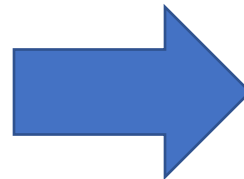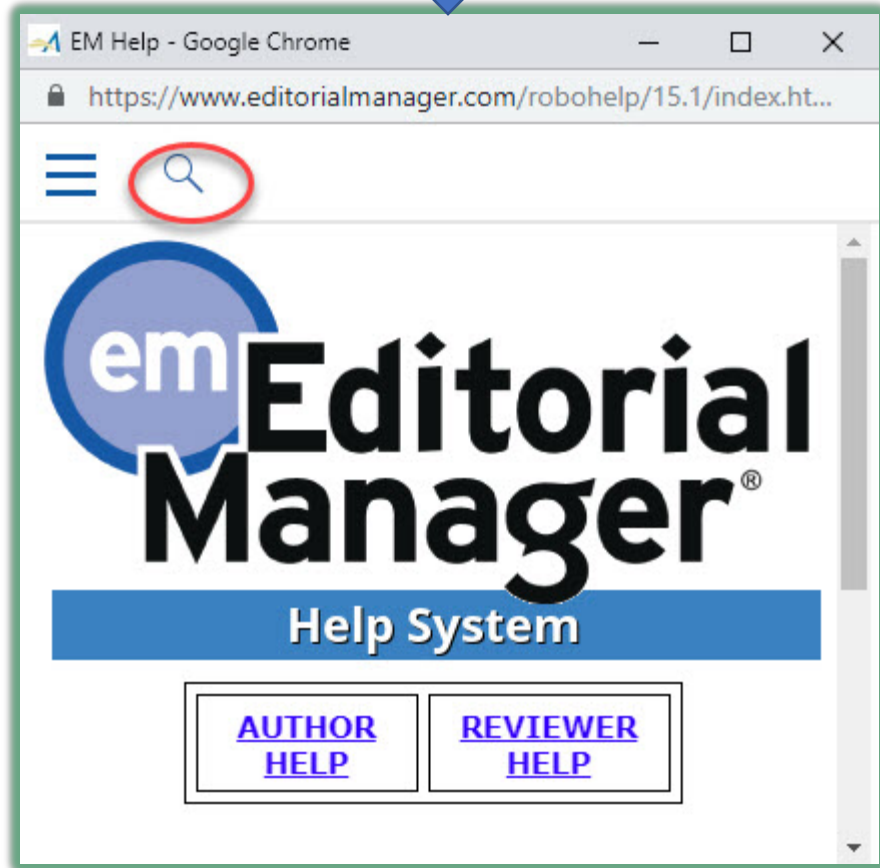|	
Letter Purpose:	Editorial Task Assignment
Subject:	%PRODTASK% Assignment for %MS_NUMBER%
Letter Family:	Production

Cancel   Continue

Help with Merge Fields

Help with Merge Fields

Task Manager for MECA export

- Another option for consideration when using Task Manager is the use of MECA to export manuscript data
- **MECA** = **M**anuscript **E**xchange **C**ommon **A**pproach
- A method for manuscript exchange: system to system, to and from preprint servers, to and from vendors
- A new zip/XML export format, via FTP
- Talk to your Account Coordinator about set-up

Interested in Task Manager?

- ProduXion Manager customers can use this functionality right away!

- Editorial Manager only customers: contact your Account Coordinator for information and pricing, or come and have a chat with me
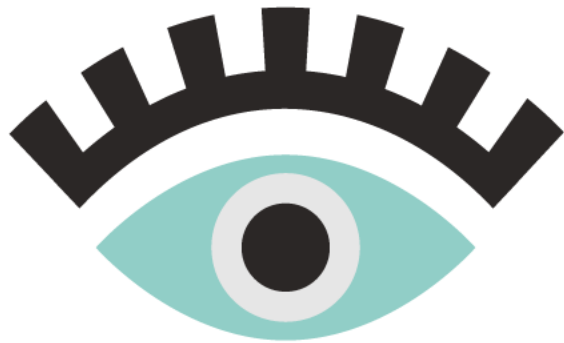
Questions?

EEMUG 2020

Task Manager Overview

Be the master of your tasks

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#EEMUG2020