

Welcome to the 17th Annual  
**EMUG BOSTON**

#EMUG2019





# EMUG 2019

## Task Manager Overview

Working with tasks in  
production and editorial workflows

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# Agenda

- What is ProduXion Manager?
- Production Tasks 101
- Initiating Production and Assigning Tasks in PM
- Challenges
- What is Task Manager?
- Task Manager Use Cases
- Task Manager Action Links and Folders
- PM and Task Manager Configurations

# 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 often 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) **1**

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.

**Editor 'To-Do' List**

My Pending Assignments (25)

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- Submissions with Active Discussions (3) 1

Reviews in Progress (0)

<ul style="list-style-type: none"> <li><a href="#">View Submission</a></li> <li><a href="#">Duplicate Submission Check (70%)</a></li> <li><a href="#">Details ▾</a></li> <li><a href="#">Initiate Discussion</a></li> <li><a href="#">History</a></li> <li><a href="#">Technical Check</a></li> <li><a href="#">File Inventory</a></li> <li><a href="#">Edit Submission</a></li> <li><a href="#">Send Back to Author</a></li> <li><a href="#">Remove Submission</a></li> <li><a href="#">Classifications</a></li> <li><a href="#">Set Final Disposition</a></li> <li style="background-color: yellow;"><a href="#">Initiate Production</a></li> <li><a href="#">Send E-mail</a></li> <li><a href="#">Linked Submissions</a></li> </ul>		DEMOJES141-D-18-00039	Original Study		Low atmosphere drifting balloons: platforms for environment monitoring and forecast improvement	Bea Arthur ▾	Mar 27 2018 3:34PM	Mar 27 2018 3:34PM	Manuscript Submitted
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# 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” RoleManagerer 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.

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

# 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.

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

# 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.

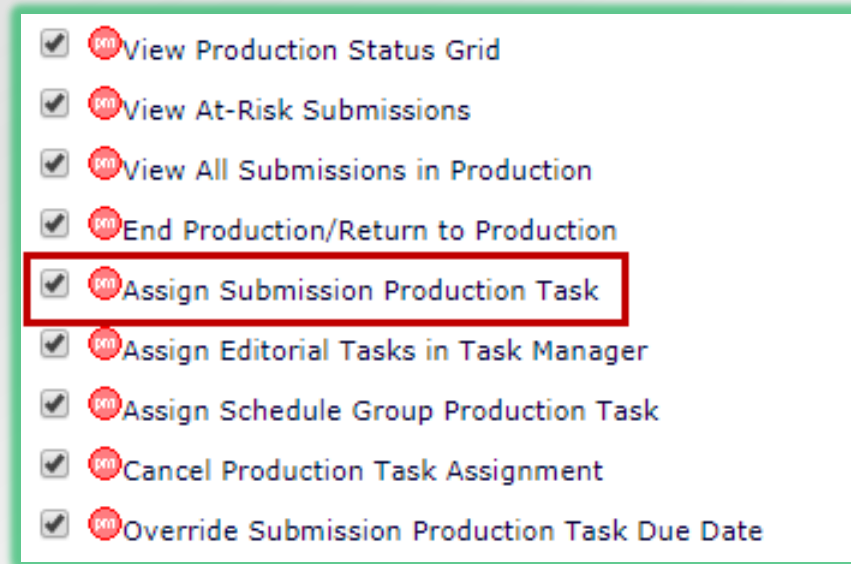
To initiate production without assigning a production task, click the 'Proceed Without Selecting a Task' button.

---

**Schedule Group:** No Schedule Group Assigned  
**Production Task:** Author Welcome Kit

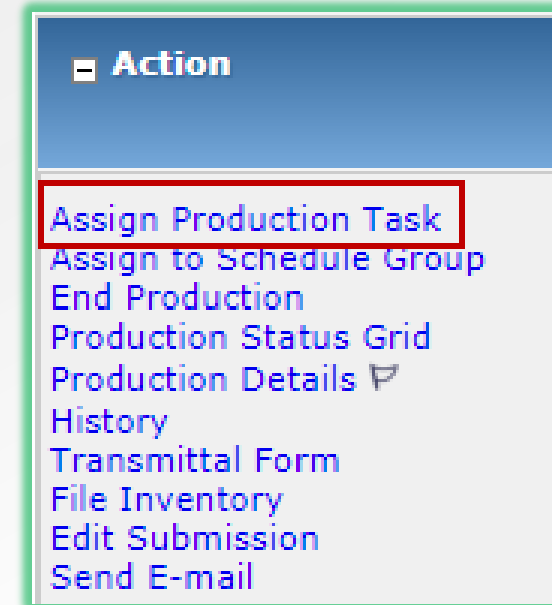
# Who assigns tasks?

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



A screenshot of a permissions list. The list contains ten items, each with a checked checkbox and a red circular icon containing the letters 'pm'. The item 'Assign Submission Production Task' is highlighted with a red rectangular border. A yellow arrow points from this item towards the right.

- pm View Production Status Grid
- pm View At-Risk Submissions
- pm View All Submissions in Production
- pm End Production/Return to Production
- pm **Assign Submission Production Task**
- pm Assign Editorial Tasks in Task Manager
- pm Assign Schedule Group Production Task
- pm Cancel Production Task Assignment
- pm Override Submission Production Task Due Date



A screenshot of an 'Action' menu. The menu has a blue header with the word 'Action' and a minus sign icon. Below the header is a list of actions. The first item, 'Assign Production Task', is highlighted with a red rectangular border.

**Action**

- Assign Production Task**
- Assign to Schedule Group
- End Production
- Production Status Grid
- Production Details ▾
- History
- Transmittal Form
- File Inventory
- Edit Submission
- Send E-mail



# 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
- May have tasks running on submissions that are not accepted for publication
- Production stats (e.g. turnaround times) become inaccurate

# Introducing TaskManager

- Lightweight implementation of Produxion Manager
- Allows for performance of pre-production task work
- Automatically available to all current PM users
- Available as a separate feature to customers not currently using PM



# Introducing TaskManager

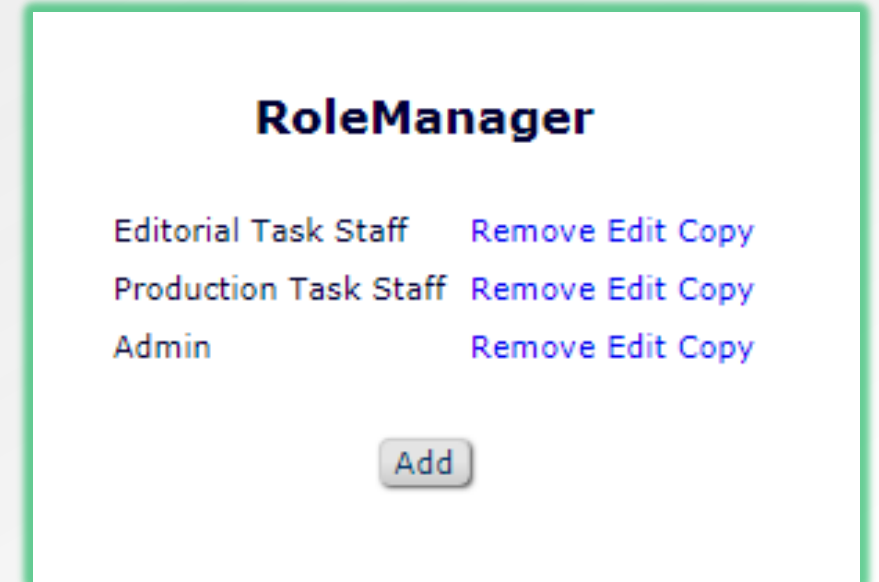
- No need to Initiate Production
- Maintain separate workflows for Editorial and Production tasks
- Keep Editorial and Production Tasks on separate teams
- Keep terminology familiar to users
- Keep Editorial and Production separate in reporting





# For example...

- Editorial Task 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
- Admin: Can access both submissions in Task Manager and submissions in production, and see “the whole picture”
- Each role only sees the folders and terminology that is relevant to the work for which the role is responsible



# 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 3<sup>rd</sup> party service provider

# Assigning an Editorial Task

Action	Manuscript Number	Article Type	Article Title	Author Name
<ul style="list-style-type: none"><li>View Submission</li><li>Duplicate Submission Check (50%)</li><li>Details ▾</li><li>Initiate Discussion</li><li>History</li><li>Submit Early Decision</li><li>Technical Check</li><li>File Inventory</li><li>Edit Submission</li><li>Send Back to Author</li><li>Remove Submission</li><li>Classifications</li><li>Get Final Disposition</li><li><b>Assign Editorial Task</b></li><li>Initiate Production</li><li>Similar Articles in MEDLINE</li><li>Send E-mail</li><li>Linked Submissions</li><li>Search in Google.com</li></ul>	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

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

# 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:**  ▼

# Assigning an Editorial Task

**Assign Task For Manuscript Number: DMITRIDEV160-D-19-00056, DOI: 10.1126/DMITRIDEV160-D-19-00056.1**  
**Abigail Author (BAHAMAS): "A Very Good Article"**

Task: Preprint Server Deposit  
Task Assigned to:

Due Date: None required (this is a Milestone Task)


Assignment Letter:

From: "Dmitri Khodjakov" <dkhodjakov45435@ariessys.com>  
To: **Dmitri Khodjakov, Test**  
Letter Purpose: Editorial Task Assignment  
Letter Subject:

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:   
bcc:

Letter Body:



Dear %FIRST\_NAME% %LAST\_NAME%,

This is an automated email to notify you of the following production task assignment.

Preprint Server Deposit  
Manuscript Number: DMITRIDEV-D-19-00056  
Title: A Very Good Article  
Author: Dr. Abigail Author



# Assigning an Editorial Task

- Select submission files to include in assignment.

**Submission Files**

Item	Description	Item Family	File Name	Size	Last Modified	QC Results	Allow Download
	PDF					N/A	<input type="checkbox"/>
Manuscript		Document	Sample Manuscript.docx	17.7 KB	May 28 2019 12:24PM	N/A	<input checked="" type="checkbox"/>

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

**Companion Files**





# 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

**Search**

[Search Submissions](#) | [Search People](#)

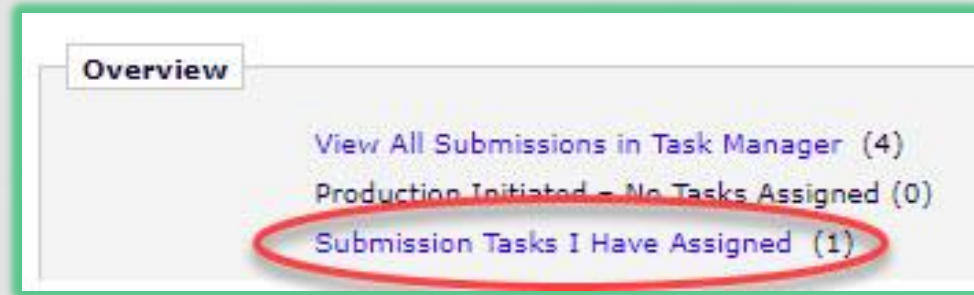
**To-Do List**

[Submission Tasks Assigned to Me](#) (4)  
[Schedule Group Tasks Assigned to Me](#) (0)  
['At-Risk' Submissions](#) (50)

**Overview**

[View All Submissions in Task Manager](#) (3)  
[Production Initiated - No Tasks Assigned](#) (11)  
[Submission Tasks I Have Assigned](#) (20)  
[View All Submissions in Production](#) (65)  
[View All Tasks With Authors](#) (4)  
[Production Status Grid](#)

# Submission Tasks I Have Assigned



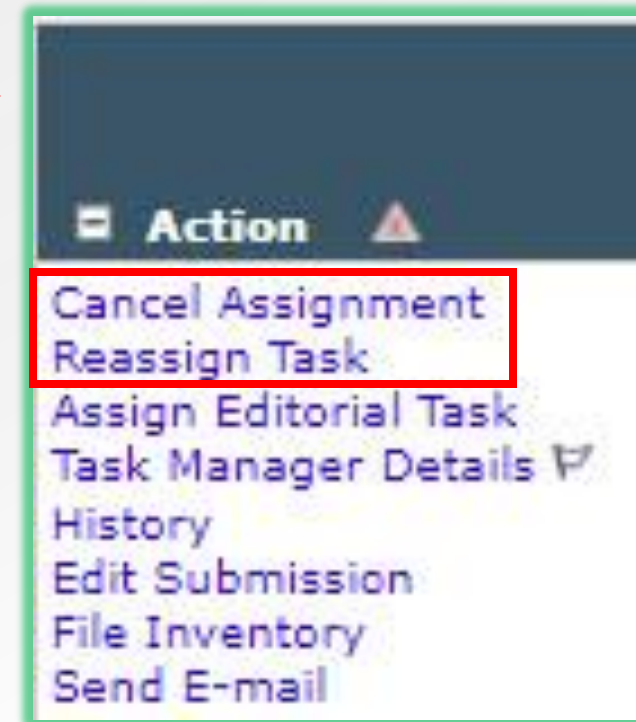
Overview

[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 and submitted here.

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

# View All Submissions in Task Manager

**Overview**

- [View All Submissions in Task Manager \(3\)](#)
- [Production Initiated - No Tasks Assigned \(11\)](#)
- [Submission Tasks I Have Assigned \(20\)](#)
- [View All Submissions in Production \(65\)](#)
- [View All Tasks With Authors \(4\)](#)

- Contains all submissions undergoing Editorial task work.

Action	Manuscript Number	Author Name	Article Title	Article Type	Initial Date Submitted	Date Task Manager Initiated
<a href="#">View Submission</a> <a href="#">Assign Editorial Task</a> <a href="#">End Task Manager</a> <a href="#">Initiate Production</a> <a href="#">Task Manager Details</a> ▾ <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DMITRIDEV151-D-18-00051R1	Amy S Author ▾ (UNITED STATES)	A new submission	Task Manager Article	Nov 27 2018 03:39PM	Nov 27 2018 02:29PM
<a href="#">View Submission</a> <a href="#">Assign Editorial Task</a> <a href="#">Initiate Production</a> <a href="#">Task Manager Details</a> ▾ <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DMITRIDEV151-D-18-00048	Abigail Author ▾ (BAHAMAS)	Another new submission	Task Manager Article	Nov 19 2018 05:18PM	Nov 19 2018 05:20PM

# 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
  - When production is initiated
  - When final disposition is set

Action	Manuscript Number
<a href="#">View Submission</a>	DMITRIDEV151-D-18-00051R1
<a href="#">Assign Editorial Task</a>	
<a href="#">End Task Manager</a>	
<a href="#">Initiate Production</a>	
<a href="#">Task Manager Details</a> ▾	
<a href="#">History</a>	
<a href="#">File Inventory</a>	
<a href="#">Edit Submission</a>	
<a href="#">Send E-mail</a>	
<a href="#">Linked Submissions</a>	



# History

- New “Task Manager Status” column indicates when editorial task work was performed.
- Only displays for submissions on which Task Manager has been initiated.

Action	Manuscript Number	Author Name	Article Title
<a href="#">View Submission Details</a> <a href="#">Task Manager Details</a> <a href="#">History</a> <a href="#">Submit Early Decision</a> <a href="#">Technical Check</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Classifications</a> <a href="#">Send Back to Author</a> <a href="#">Set Final Disposition</a> <a href="#">Assign Editorial Task</a> <a href="#">Initiate Production</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DMITRIDEV160-D-19-00056	Abigail Author	A Very Good Article

STATUS HISTORY						
Status Date	Document Status	Task Manager Status	Status Days	Role Family	Revision	Operator
May 28 2019 2:19PM		Task Manager Completed	----		0	Dmitri Khodjakov, Test
May 28 2019 2:06PM		In Task Manager	----		0	Dmitri Khodjakov, Test
May 28 2019 2:06PM		Task Manager Initiated	----		0	Dmitri Khodjakov, Test
May 28 2019 12:25PM	Submitted to Journal		----	EDITOR	0	Abigail Author
May 28 2019 12:24PM	Needs Approval		----	AUTHOR	0	Abigail Author
May 28 2019 12:24PM	Building PDF		----	AUTHOR	0	Abigail Author

# History

- Labels indicate which tasks were assigned as part of Task Manager.
- Letters sent at task assignment and completion are recorded in Correspondence History.

PRODUCTION TASK HISTORY	
Production Task	Date Task Assigned
Preprint Server Deposit <i>(Assigned in Task Manager)</i>	May 28 2019 2:17PM

Correspondence Date	Letter	Recipient
May 28 2019 2:17PM	<i>Editorial Task Assignment</i>	Dmitri Khodjakov, Test
May 28 2019 12:25PM	New Submission Sent to Journal (purpose)	Arnie Niekamp
May 28 2019 12:25PM	New Submission Sent to Journal (purpose)	Sally Editor, PhD

# Details

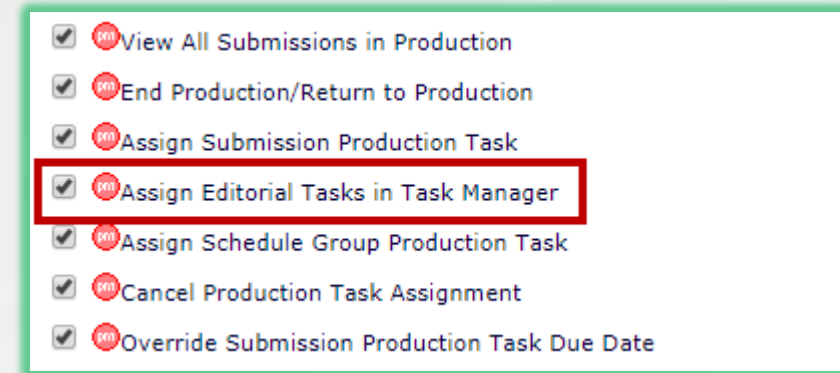
- Labels on the Details page indicate which tasks were assigned in Task Manager.

<b>Description:</b>	Preprint Server Deposit <i>(Assigned in Task Manager)</i>
<b>Production Task Status:</b>	Completed
<b>Assigned To:</b>	Dmitri Khodjakov, Test ▾ [Proxy]
<b>Date Assigned:</b>	May 28 2019 2:06PM
<b>Date Task Due:</b>	May 28 2019 11:59PM
<b>Completed</b>	May 28 2019 2:08PM

# Configuration Options

# RoleManager

- New 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

- Existing permissions allow users to see status, assignment, and correspondence histories.

- View Checkin Results
- View Editorial Status History
- View Submission Production Status History
- View Submission Production Task Assignment History
- View Schedule Group Production Task Assignment History
- View Editorial Correspondence History
  - Edit Letter when Resending
- View Submission Production Correspondence History

# 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			<a href="#">Copy</a>
Default Proposals			<a href="#">Copy</a>
Default Production			<a href="#">Copy</a>

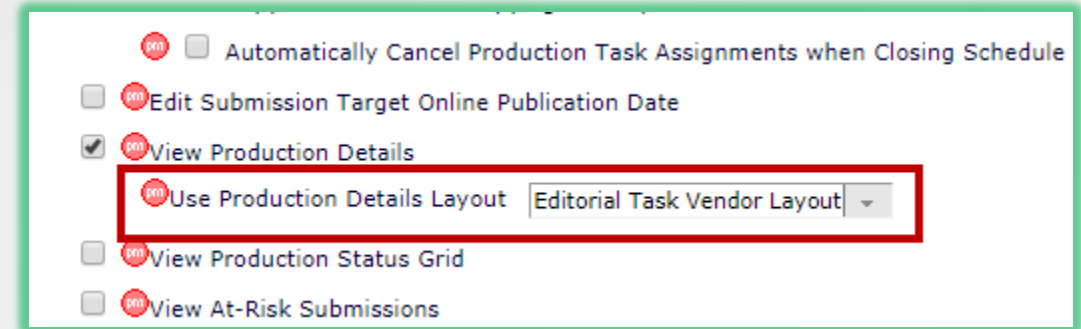
User-Defined Layouts			
Editorial Task Staff Layout	<a href="#">Remove</a>	<a href="#">Edit</a>	<a href="#">Copy</a>
Editorial Task Vendor Layout	<a href="#">Remove</a>	<a href="#">Edit</a>	<a href="#">Copy</a>

[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



A screenshot of a configuration interface for production details layout. The interface is enclosed in a green border. It contains several settings, each with a red circular icon containing the letters 'PM'. The settings are:

- Automatically Cancel Production Task Assignments when Closing Schedule
- Edit Submission Target Online Publication Date
- View Production Details
- Use Production Details Layout Editorial Task Vendor Layout (This line is highlighted with a red border)
- View Production Status Grid
- View At-Risk Submissions

# 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

- Your task library. Click Edit to add or configure tasks.

## 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 the Task

### Edit Submission 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

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)

#### 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



# Configuring the Task

~~Batch Assignment can be triggered on either a set of submissions selected from the Search Submissions Results Production view, or all Submissions in a Schedule Group selected from the Manage Schedule Groups folder. Only tasks that are specifically configured to allow batch assignment can be used in these cases. Tasks that are configured for Assignment to 'Corresponding Author Only' cannot also be configured to Allow Batch Assignment.~~

Allow Batch Assignment

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:**

Editorial Task Staff ▲  
Managing Editor

Choose one or more of the roles that have permission to assign this task.

**Can be Assigned to:**

- Corresponding Author only  
 Selected Editor/Publisher Roles only

Choose the role that can be assigned this task.

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.

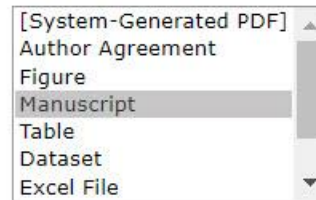
Editorial Task Staff ▲  
Managing Editor  
Publisher

# Configuring the Task

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]  
Author Agreement  
Figure  
Manuscript  
Table  
Dataset  
Excel File

These are populated from PolicyManager > Submission Policies > Edit Submission Items.

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

Allows assignee to reassign to someone else to perform this task

## Questionnaire Options

Use Custom Questionnaire:

None



# Configuring the Task

**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
- FTP task without go.xml file
- Use Manuscript Number for file names

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

Username

Password

Subdirectory:

Email Address (for transmittal notification):

**Submission Production Task Import Profile:**

Email Address (for import notification):

None

- XML file is required

Select Fields for Import

What gets sent out

What gets sent back in

Credentials and notification email

# Configuring the Task

PolicyManager -> Edit Submission Items



### 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.

- Biosketch
- Biosketch Photo
- Companion file configured for checkCIF
- Companion File DOC Only
- Companion File going through Reference Checking
- Companion File URL
- CONSORT Agreement (only if required)

### Scheduling and Due Date Options

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

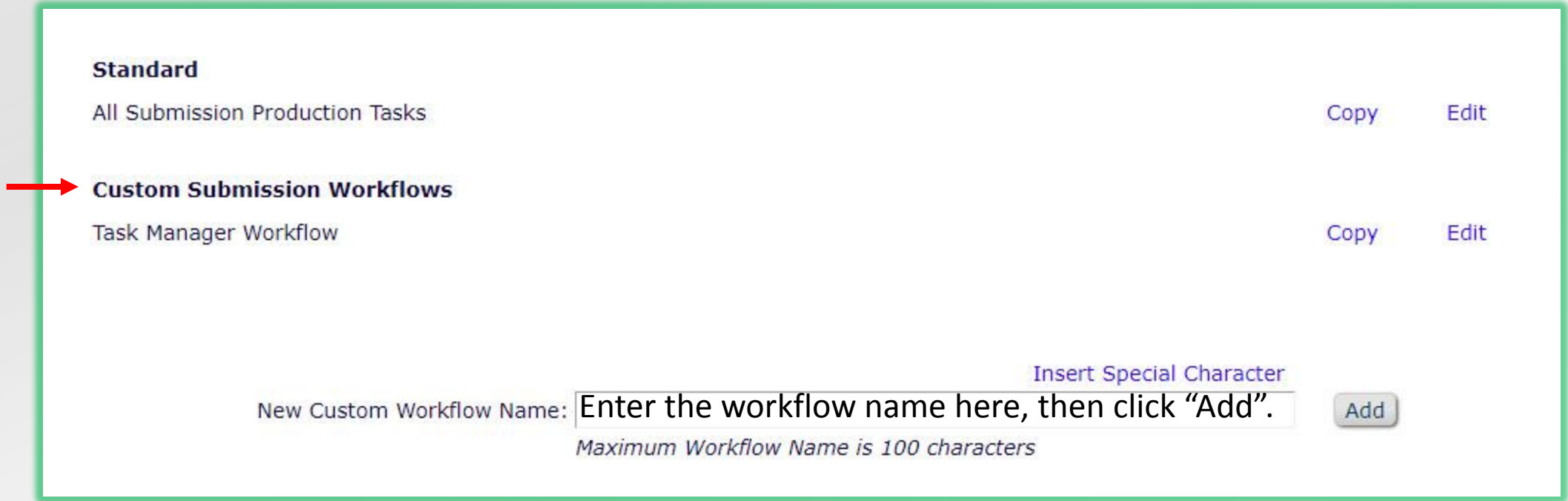
Milestone Tasks do not require a response and automatically have the same start and end dates. Set the Task to be a Milestone if you do not wish to track the duration, or wish to simply log a key milestone. Otherwise you may enter one or more Due Date calculation methods, and the earliest possible date will be used when allocating a task.

#### Due Date:

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

# Configuring the Workflow

Workflows you have created are made up of tasks from your task library




The screenshot shows a web interface for configuring workflows. It is divided into two main sections: 'Standard' and 'Custom Submission Workflows'. The 'Standard' section contains one entry: 'All Submission Production Tasks', with 'Copy' and 'Edit' links to its right. The 'Custom Submission Workflows' section contains one entry: 'Task Manager Workflow', also with 'Copy' and 'Edit' links. Below these sections is a form for creating a new custom workflow. It includes a text input field with the placeholder text 'Enter the workflow name here, then click "Add".' and an 'Add' button. Above the input field is a link for 'Insert Special Character'. Below the input field is a note: 'Maximum Workflow Name is 100 characters'. A red arrow points from the text on the left to the 'Custom Submission Workflows' section.




<b>Standard</b>		
All Submission Production Tasks	Copy	Edit
<b>Custom Submission Workflows</b>		
Task Manager Workflow	Copy	Edit

New Custom Workflow Name:  [Insert Special Character](#)

*Maximum Workflow Name is 100 characters*

# Configuring the Workflow

Workflow Name:  

Order	Task Type (↕=Milestone)	Assign if First Task 	Trigger Task(s) 	Allow Repeats 

Language Edit  
Copyright Check  
Preprint Server Deposit [+ Add Selection\(s\) to Workflow](#)

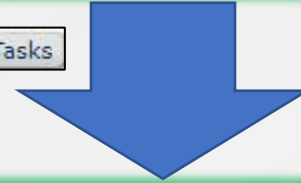
Please select one or more Submission Production Tasks and Add them to this workflow.

Choose your task(s) and click “Add Selection(s) to Workflow”.

# Trigger Tasks

	Order	Task Type (◆=Milestone)	Assign if First Task i		Trigger Task(s) i	Allow Repeats i
	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 i		Trigger Task(s) i	Allow Repeats i
	1	Language Edit [Edit]				
	2	Copyright Check [Edit]			Language Edit	
	3	Preprint Server Deposit [Edit]			Language Edit Copyright Check	<input checked="" type="radio"/> No <input type="radio"/> Yes

Return to Configure Workflows and Tasks

# Automatic Triggers for Editorial Tasks

- 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.

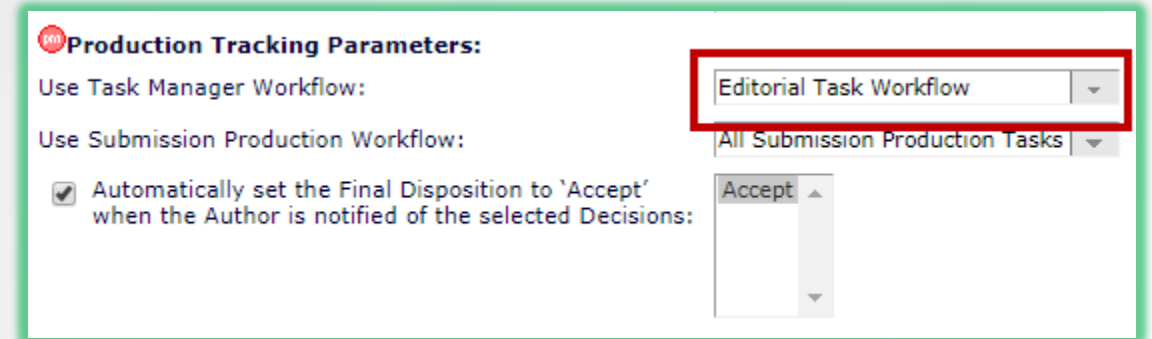
## Task Manager Automatic Assignment Options

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

# Select Task Manager Workflow

- Any production task workflow can be set as the “Task Manager Workflow” for an Article Type.
- Set to “None” to suppress editorial task assignment on an Article Type.



The screenshot shows a form titled "Production Tracking Parameters:" with a red icon. It contains three main sections: "Use Task Manager Workflow:" with a dropdown menu set to "Editorial Task Workflow" (highlighted with a red box); "Use Submission Production Workflow:" with a dropdown menu set to "All Submission Production Tasks"; and a checkbox labeled "Automatically set the Final Disposition to 'Accept' when the Author is notified of the selected Decisions:" which is checked. Below the checkbox is a dropdown menu with "Accept" selected.



# 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.

Assign automatically when author returns submission to publication

Assign automatically when editor edits and approves submission

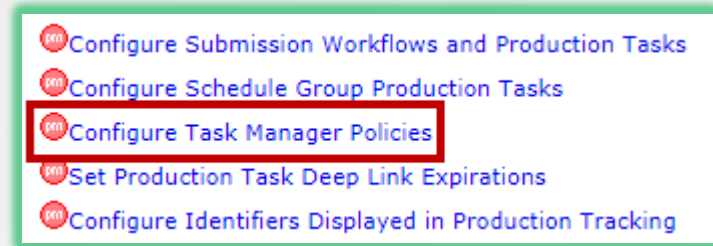
Automatically End Production or Task Manager when the Task is Completed and there are No Other Open Tasks in the Workflow.

End Production/Task Manager Automatically after this task is Completed

Batch Assignment can be triggered on either a set of submissions selected from the Search Submissions Results Production view, or all Submissions in a Schedule Group selected from the Manage Schedule Groups folder. Only tasks that are specifically configured to allow batch assignment can be used in these cases. Tasks that are configured for Assignment to 'Corresponding Author Only' cannot also be configured to Allow Batch Assignment.

# 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.



**Configure Task Manager Policies**

Users with the "Assign Editorial Tasks in Task Manager" RoleManager permission will be able to assign Editorial Tasks on submissions before Production is initiated. Submissions on which Editorial Tasks have been assigned will remain in Task Manager until Task Manager is manually closed, or one of the events selected on this page takes place.

Automatically end Task Manager when Production is initiated (if no tasks are open)

Automatically end Task Manager when Final Disposition is set (if no tasks are open)

Cancel Submit

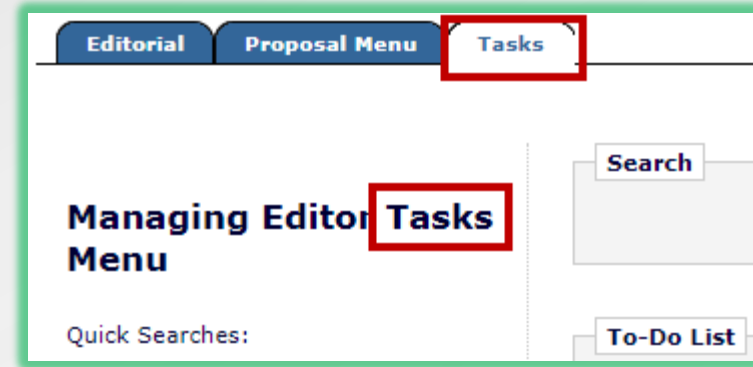
# Using “Task Manager” Labels

- Existing production-specific text may not be applicable for staff/vendors performing editorial task work.
- A new RoleManager permission will relabel some production-specific terminology throughout the UI.
- Task assignment pages for tasks assigned in Task Manager are also relabeled.



# Using “Task Manager” Labels

- “Production Tasks” tab and menu are relabeled to “Tasks”
- “Production Details” become “Task Manager Details”



The screenshot shows a web interface with three navigation tabs: "Editorial", "Proposal Menu", and "Tasks". The "Tasks" tab is highlighted with a red box. Below the tabs, the main heading is "Managing Editor Tasks", with "Tasks" also highlighted in a red box. To the right of the heading is a search box labeled "Search" and a "To-Do List" button. Below the heading, there is a section labeled "Quick Searches:".

Action	Manuscript Number	Author Name
<a href="#">View Submission</a>	DMITRIDEV151-D-18-00051R1	Amy S Author (UNITED STATES)
<a href="#">Assign Editorial Task</a>		
<a href="#">Initiate Production</a>		
<a href="#">Task Manager Details</a>		
<a href="#">History</a>		
<a href="#">File Inventory</a>		
<a href="#">Edit Submission</a>		
<a href="#">Send E-mail</a>		
<a href="#">Linked Submissions</a>		

# Task-Related Letters

- There are 3 letters you might need for a task
  - Task Assignment Letter: sent to the person to whom the task is assigned.
  - Task Cancellation Letter: sent to the person to whom the task is assigned (if the task is cancelled).
  - Task Submission Letter: sent to the person who assigned the task (once the task is completed).
- None of these letters are required.

# Task-Related 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:**

Editorial Task Assignment

~~**Batch Assignment Letter:**~~

~~Please Choose a Letter~~

**Cancel Assignment Letter:**

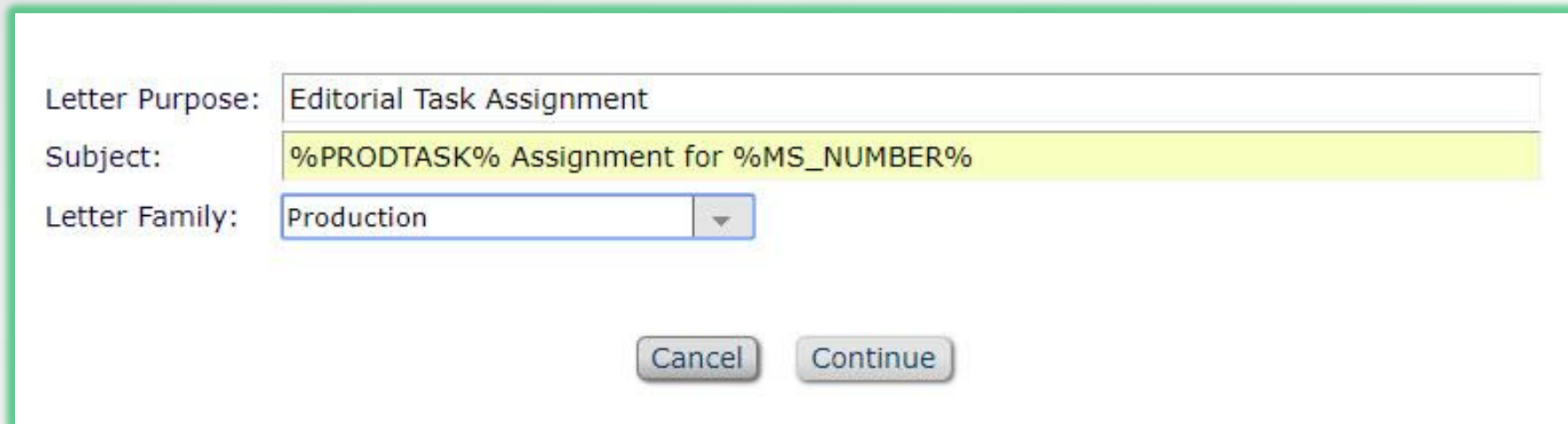
Cancel Task Assignment

**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

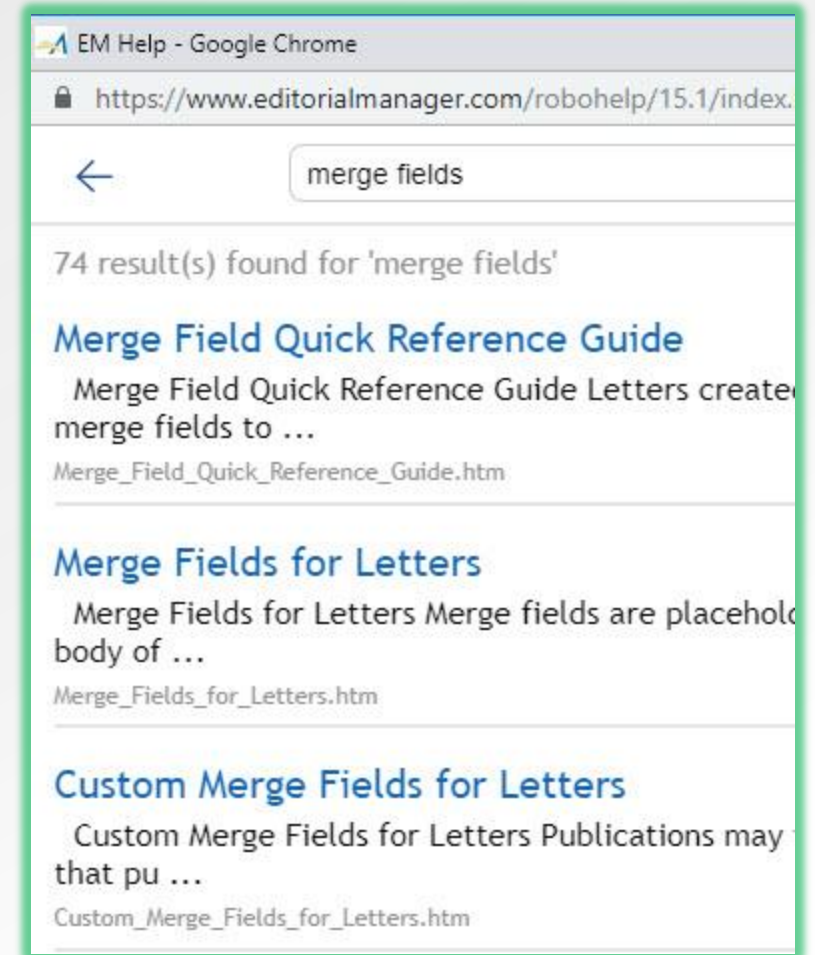
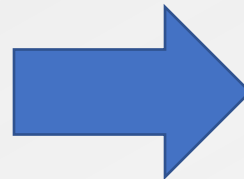
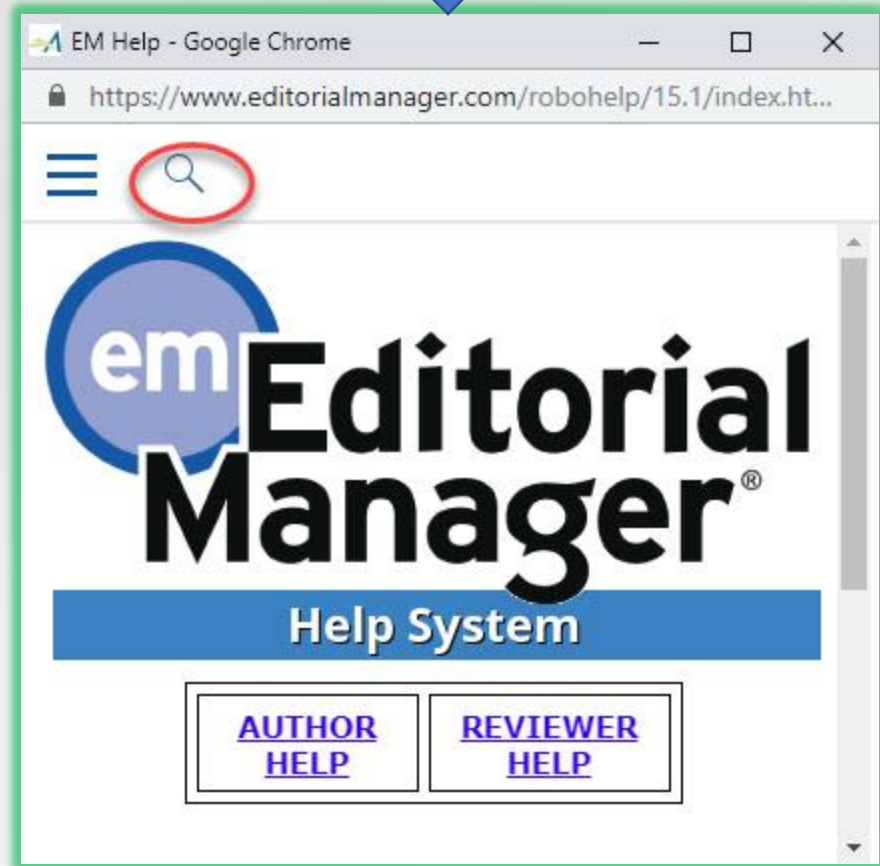


The screenshot shows a dialog box with three input fields and two buttons. The 'Letter Purpose' field contains 'Editorial Task Assignment'. The 'Subject' field contains the merge field '%PRODTASK% Assignment for %MS\_NUMBER%' and is highlighted in yellow. The 'Letter Family' dropdown menu is set to 'Production'. At the bottom are 'Cancel' and 'Continue' buttons.

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

Cancel Continue

# Help with Merge Fields





# Help with Merge Fields

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		All Formats
			Text	Rich Text (HTML)	
Accept - pending minor revision	Decision		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
Author - Other Author Verification	General	Author - Notify Other Authors	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
Author - Other Author Verification Reminder	Author Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide



Insert Custom Merge Field | **Insert System Merge Field**



### Insert System Merge Fields

You can drag and drop merge fields from here to the letter Subject or Body. [\(more...\)](#)

Q PROD x Expand All | Collapse All

- %PROD\_TASK\_DEEP\_LINK%  
Inserts a hyperlink that fully logs the Author into EM/PM, and takes the [\(more...\)](#)
- %PROD\_TASK\_EDITOR\_PUBLISHER\_DEEP\_LINK%
- %PRODTASK%
- %PRODTASK\_ASSIGN\_DATE%

# 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.





# EMUG 2019

## Task Manager Overview

Working with tasks in  
production and editorial workflows

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