Welcome to the 17th Annual
EMUG BOSTON
#EMUG2019

EMUG 2019

Task Manager Overview

Working with tasks in
production and editorial workflows

Dmitri Khodjakov
Business Systems Analyst
dkhodjakov@ariessys.com

Aries systems
Publish Faster. Publish Smarter.

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

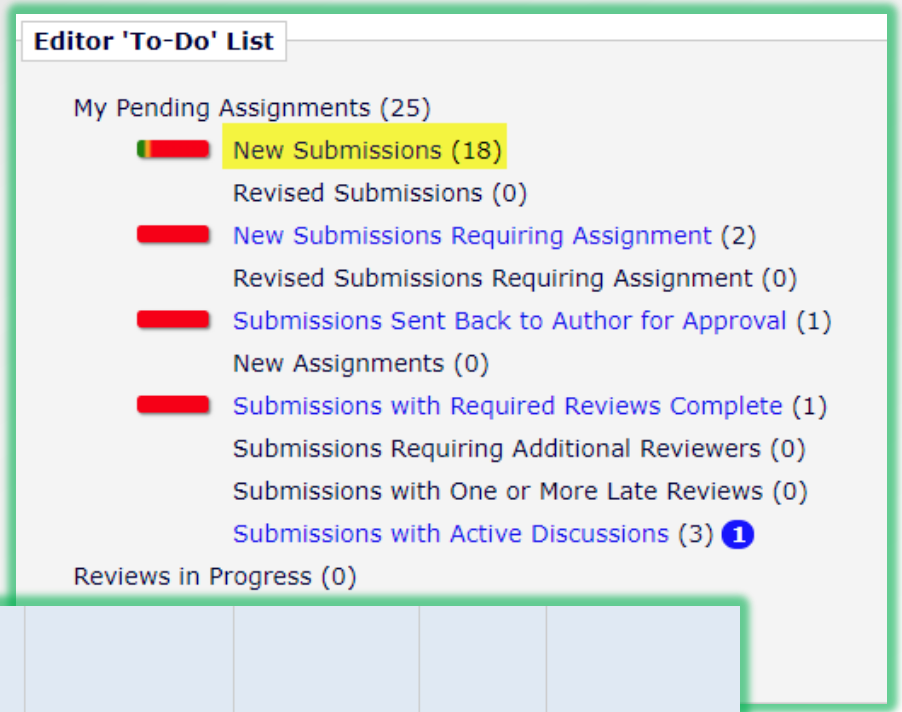
Initiating Production and Using Tasks in PM

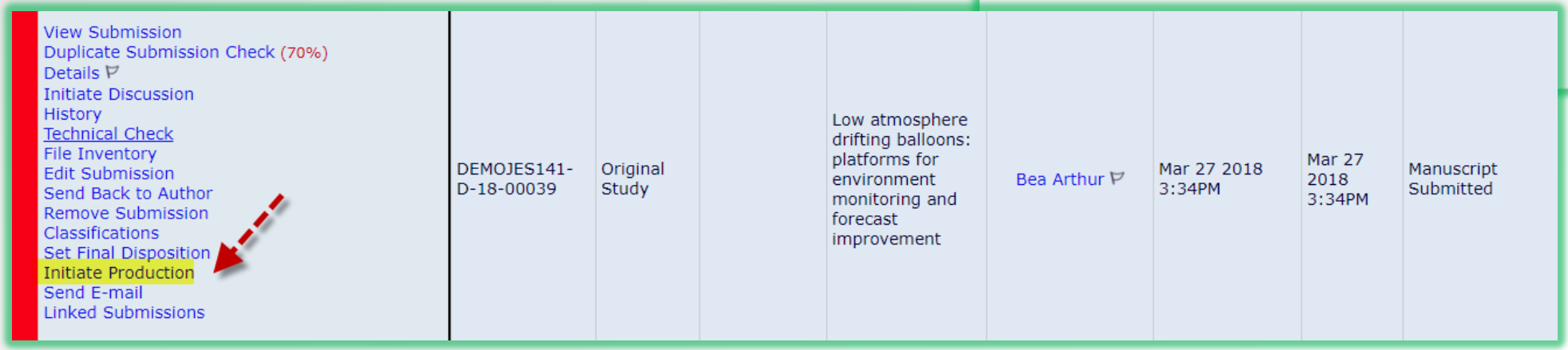
Initiating Production

- Usually happens after acceptance…
- But can actually take place at any time.

Initiating Production

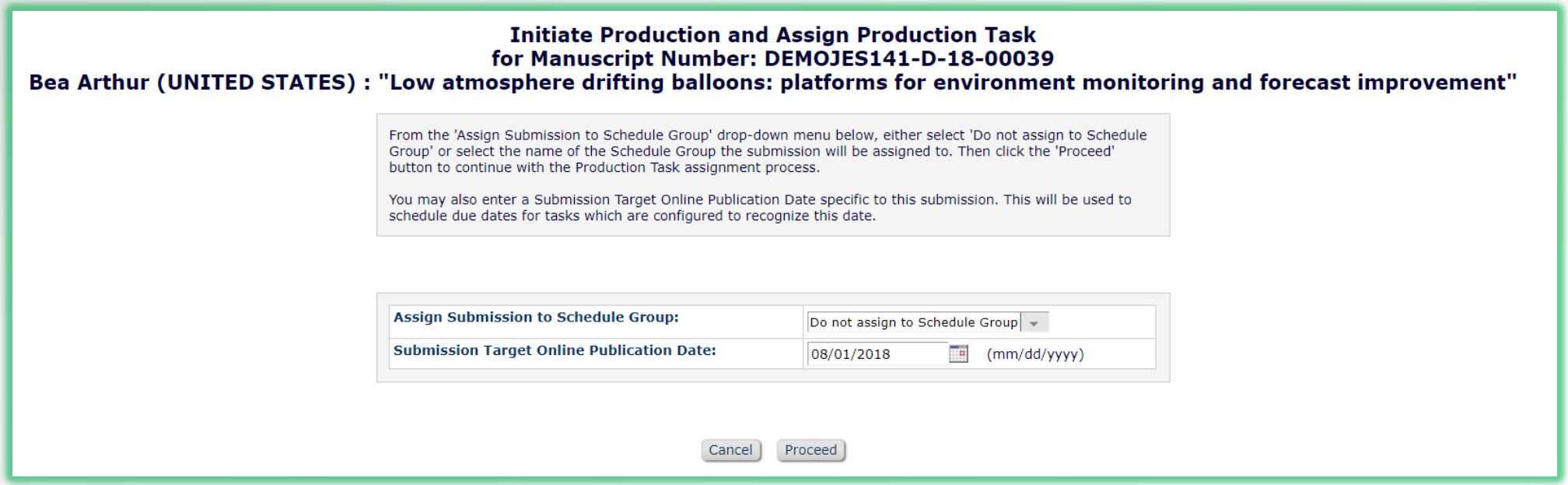
- Usually happens after acceptance…
- But can actually take place at any time.



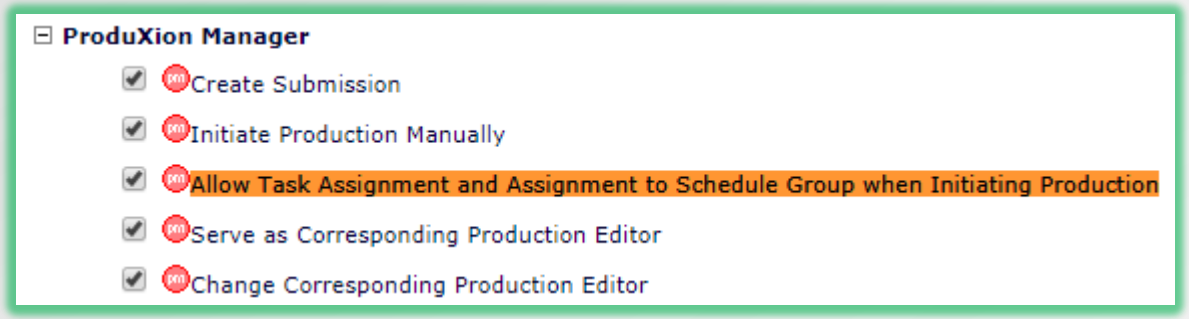


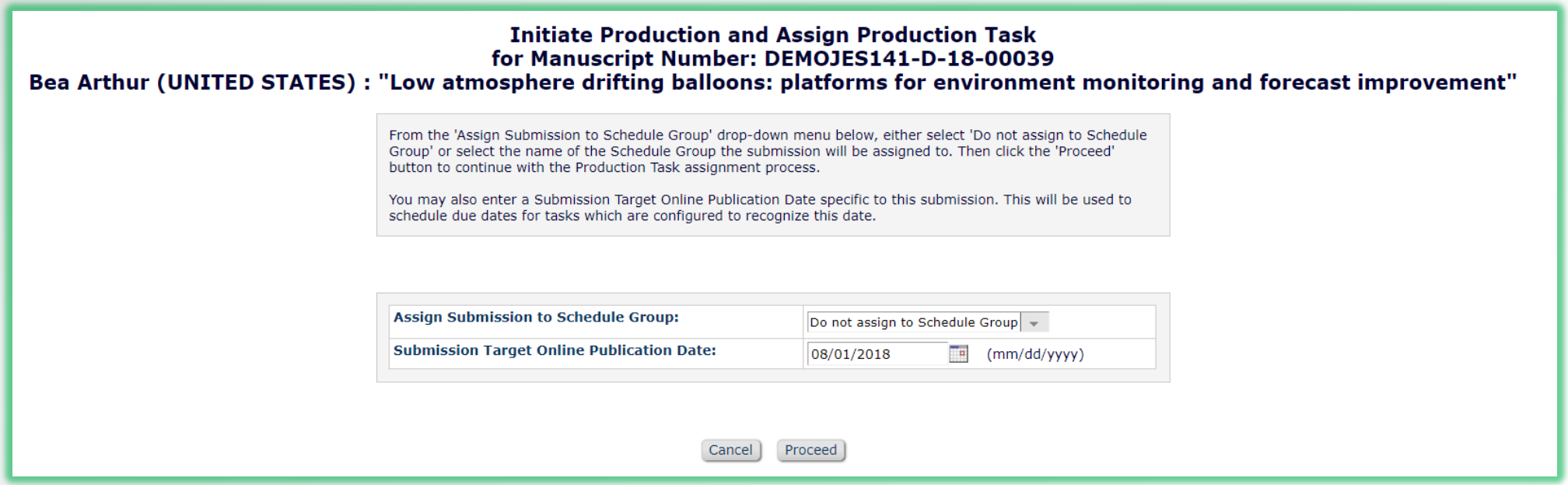
Assigning Schedule Group

- Submissions can be assigned to a Schedule Group (issue) when production is initiated.
- Requires “Allow Task Assignment and Assignment to Schedule Group” RoleManager permission.



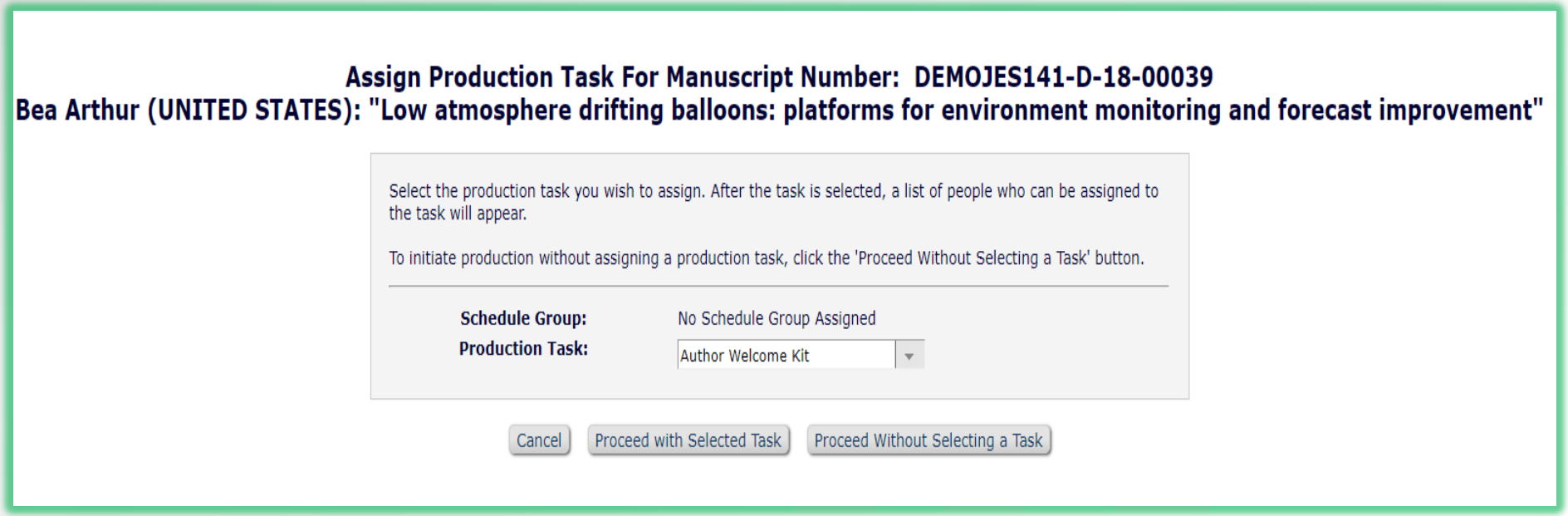
Assigning Schedule Group





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



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

Introducing TaskManager

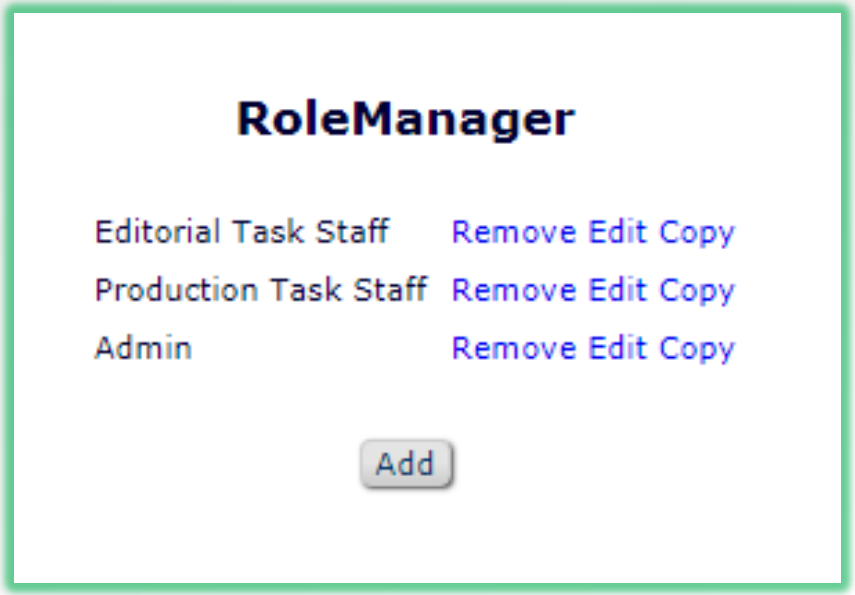
- Lightweight implementation of ProduXion Manager
- Allows for performance of pre-production task work
- Automatically available to all current PM users
- Available as a separate feature to customers not currently using PM

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

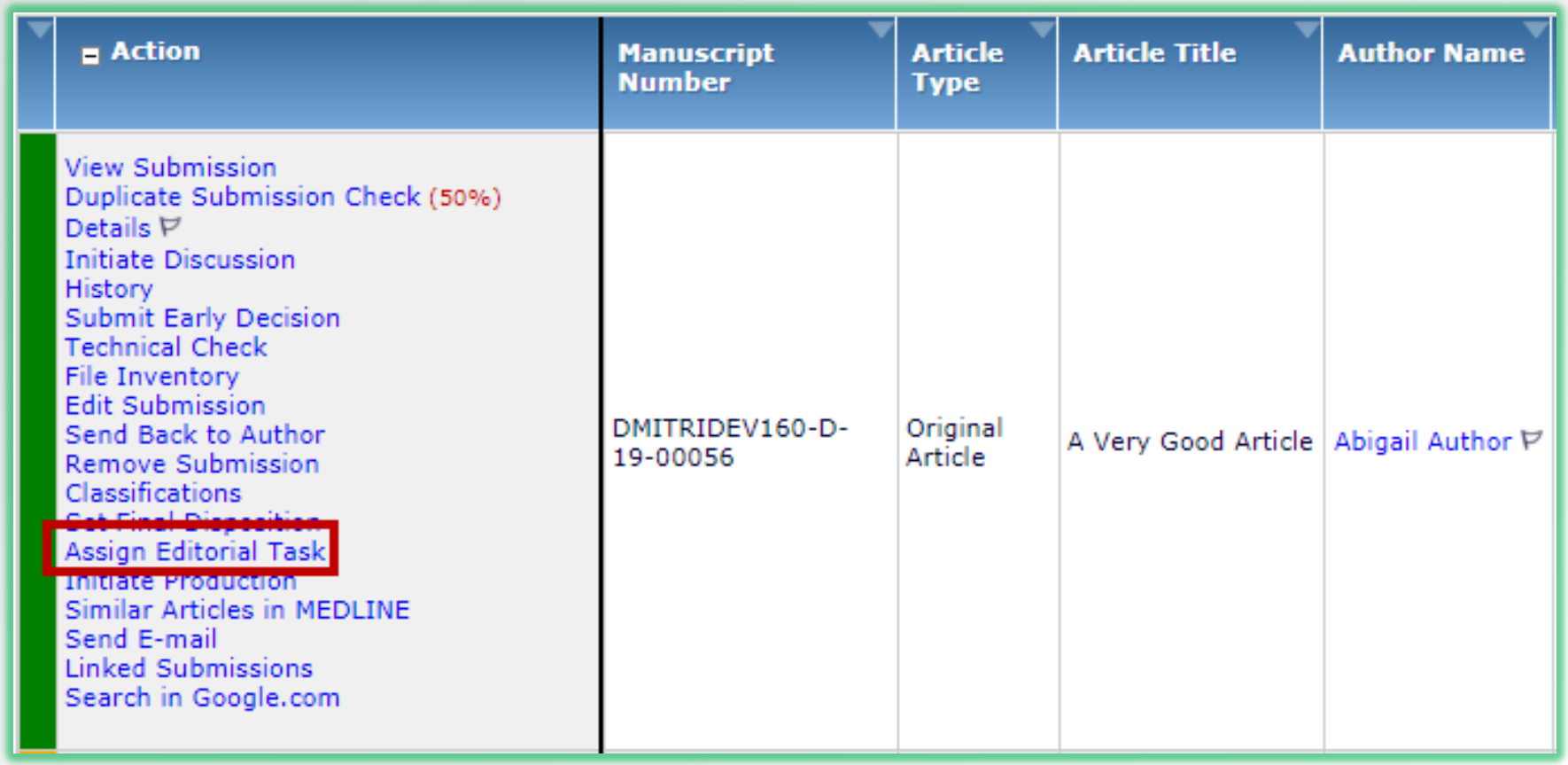


Working with Editorial Tasks

Sample Editorial Tasks

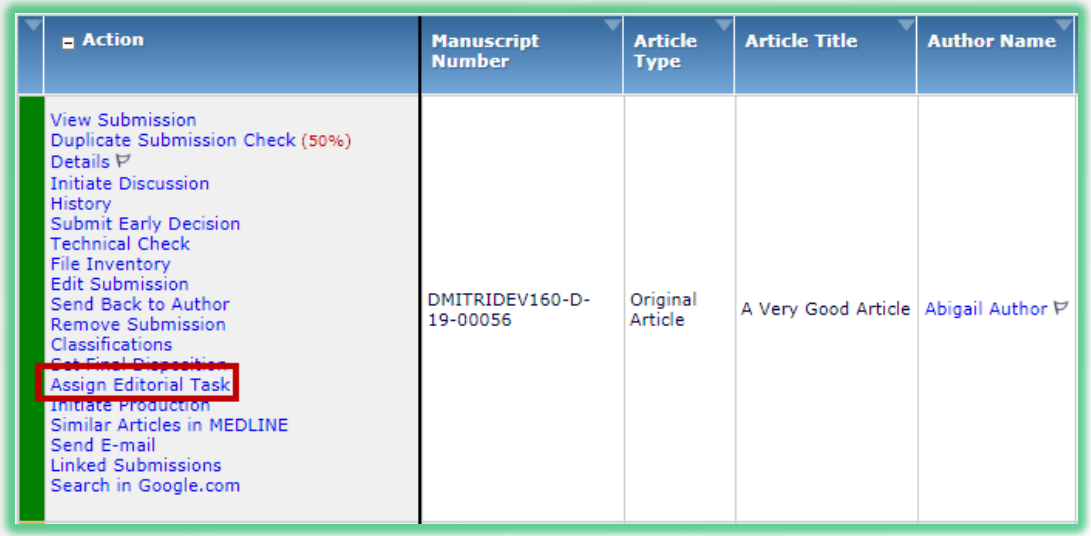
- Transferring a file to an online preprint server
- Assigning submission to staff to check copyright questions/forms
- Assigning submission to a vendor for artwork checking/pre-processing
- Transferring submission to a language editing service
- Transferring submission to a taxonomy or semantic enrichment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

Assigning an Editorial Task



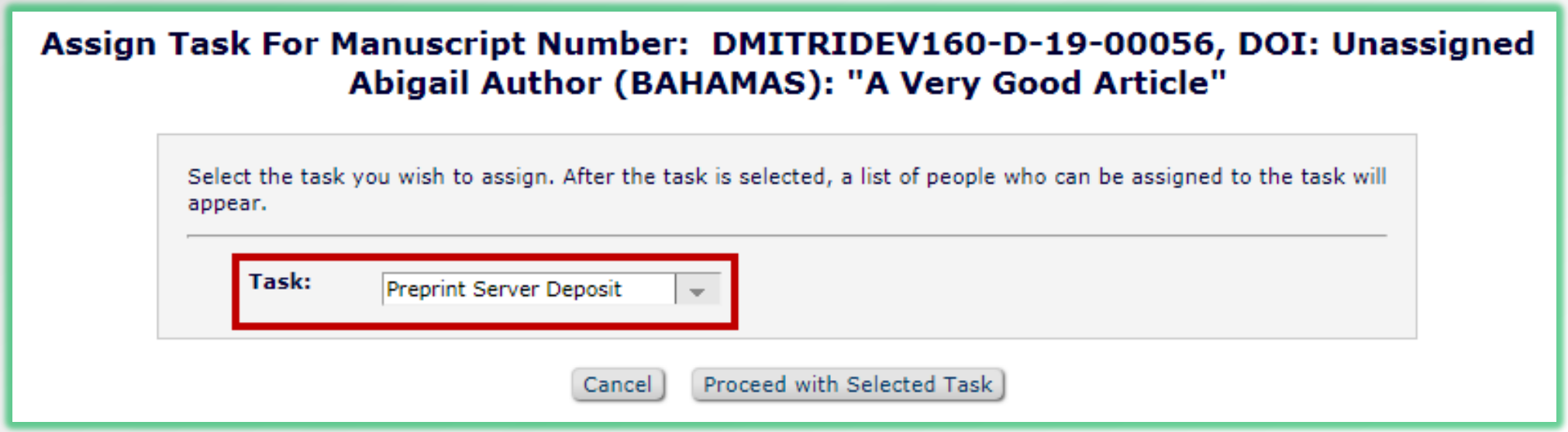
Assigning an Editorial Task

- 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

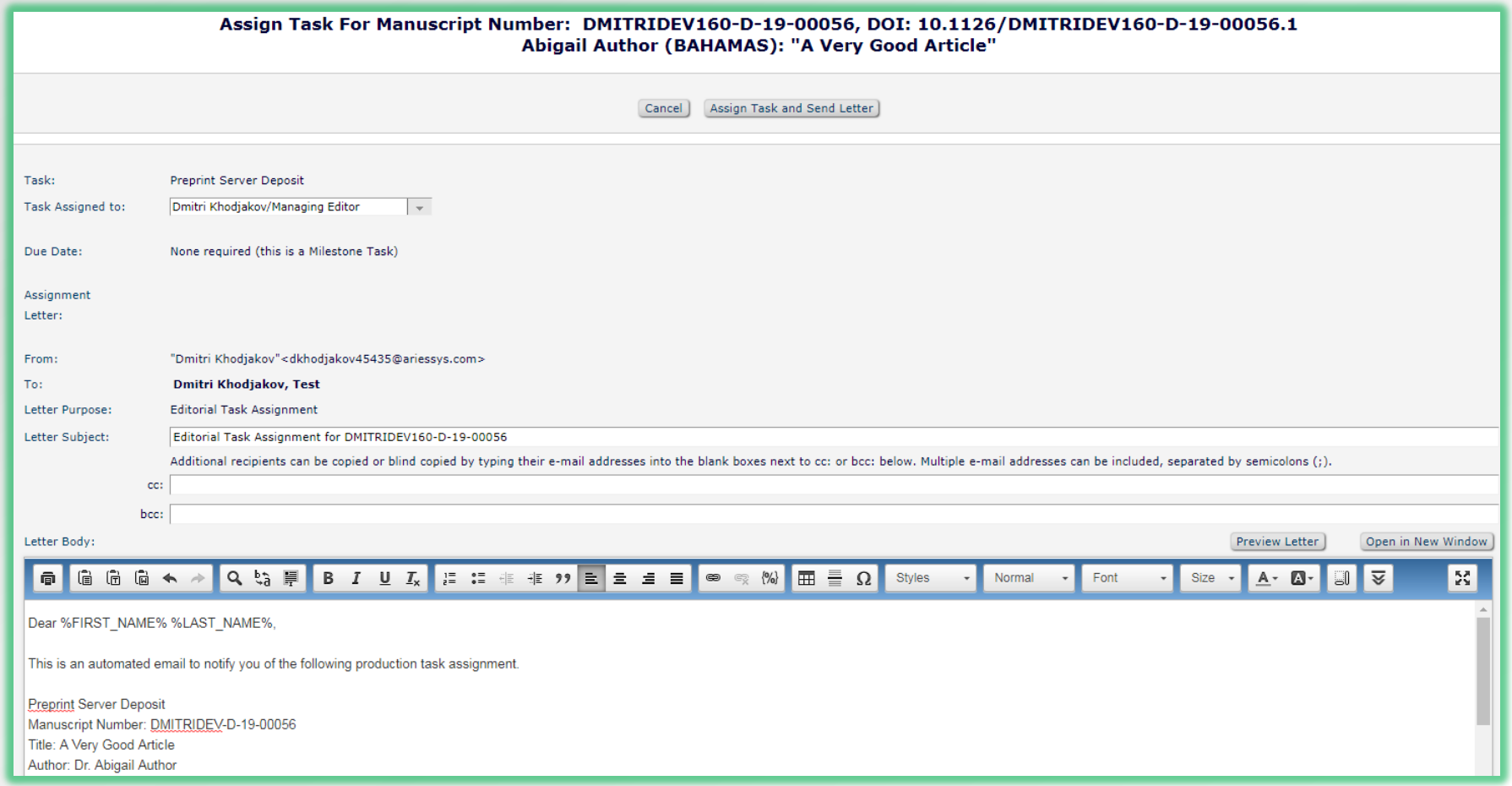


Assigning an Editorial Task

- Tasks are selected from the “Task Manager Workflow” assigned to the Article Type.

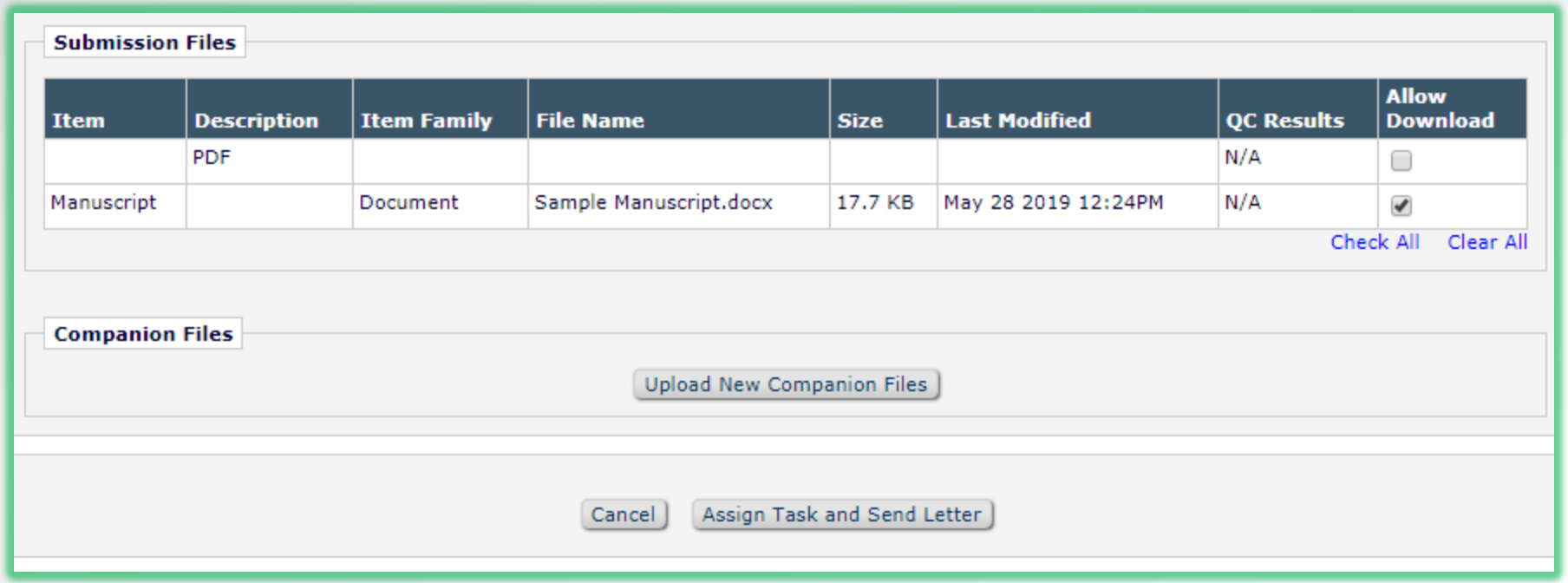


Assigning an Editorial Task



Assigning an Editorial Task

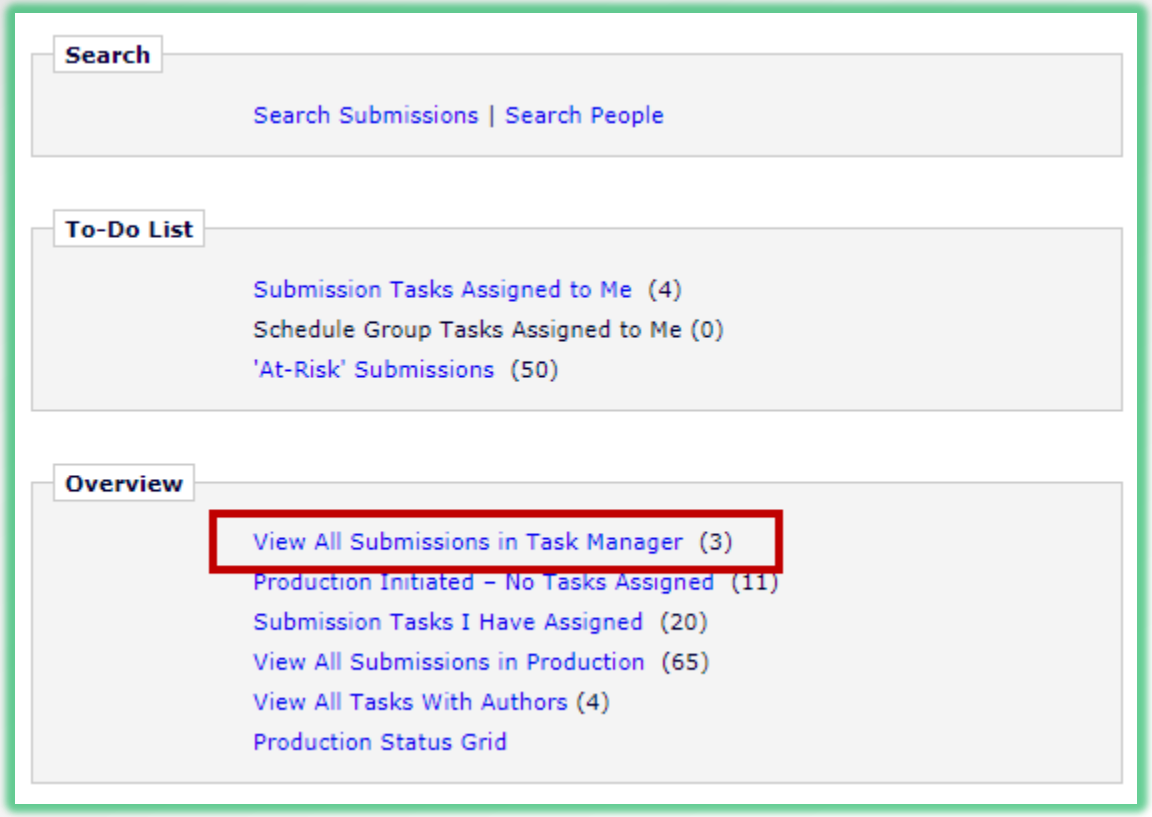
- Select submission files to include in assignment.



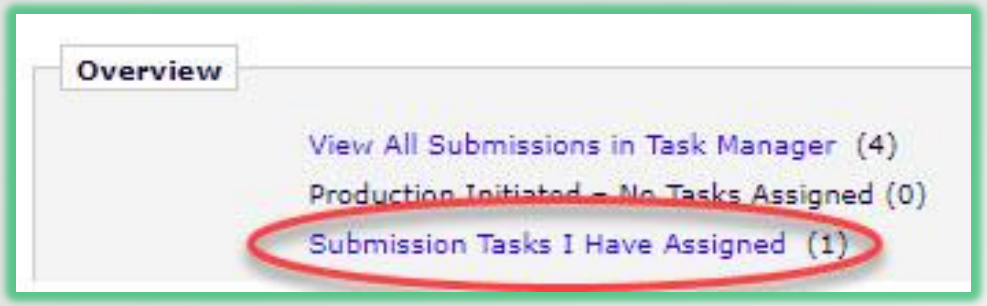
Action Links and Folder Views

Main Menu

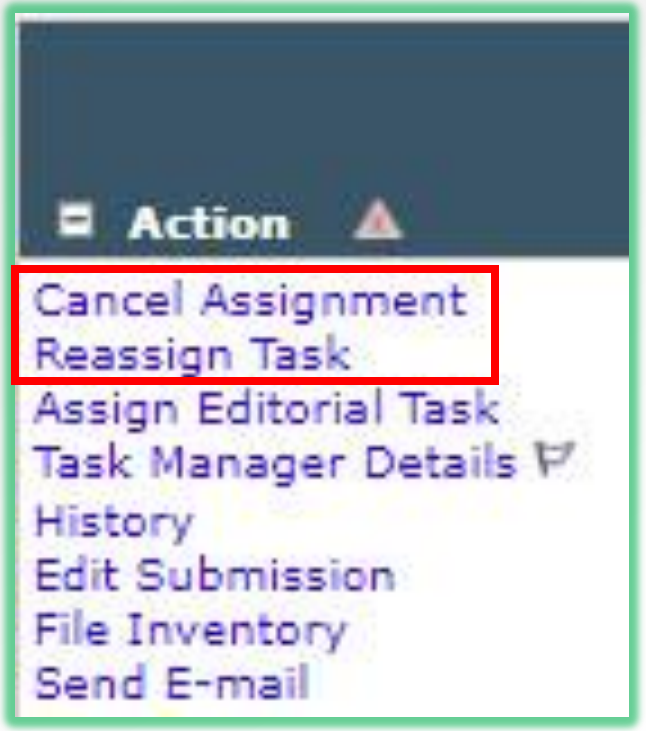
- New “View All Submissions in Task Manager” folder
- Some existing folders reused for Task Manager:
  - Submission Tasks Assigned to Me
  - Submission Tasks I Have Assigned



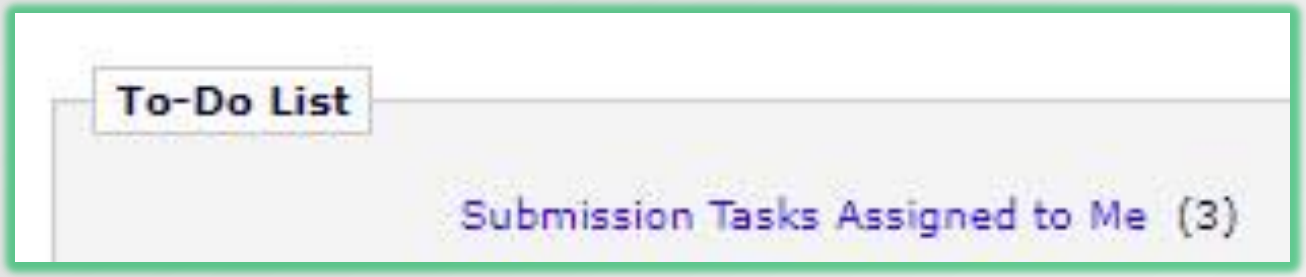
Submission Tasks I Have Assigned



- Users can cancel or reassign tasks they previously assigned.



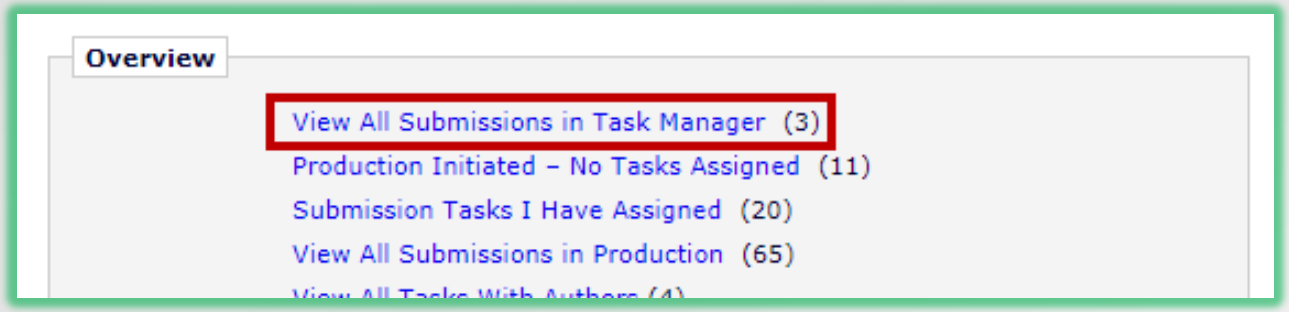
Submission Tasks Assigned to Me



- TM tasks can be viewed 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

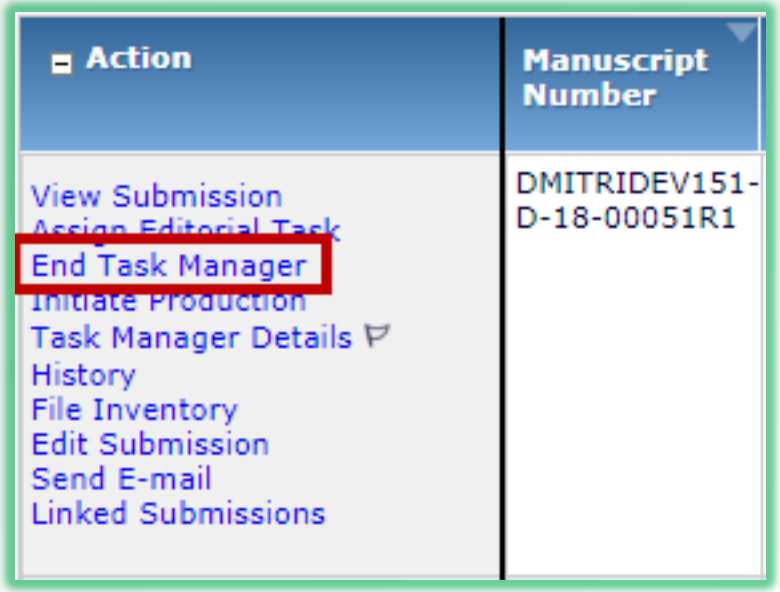


- Contains all submissions undergoing Editorial task work.

Action	Manuscript Number	Author Name	Article Title	Article Type	Initial Date Submitted	Date Task Manager Initiated
View Submission Assign Editorial Task End Task Manager Initiate Production Task Manager Details History File Inventory Edit Submission Send E-mail Linked Submissions	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
View Submission Assign Editorial Task Initiate Production Task Manager Details History File Inventory Edit Submission Send E-mail Linked Submissions	DMITRIDEV151-D-18-00048	Abigail Author (BAHAMAS)	Another new submission	Task Manager Article	Nov 19 2018 05:18PM	Nov 19 2018 05:20PM

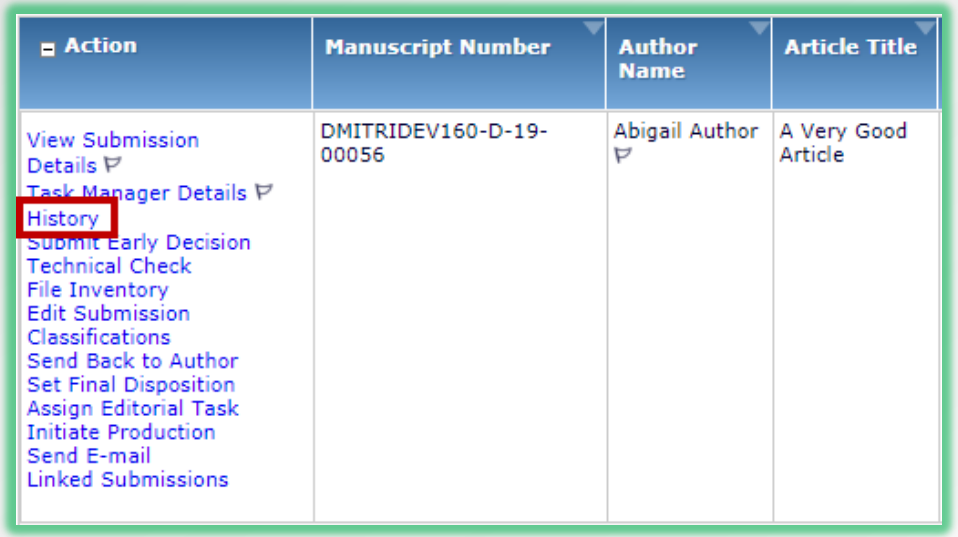
Ending Task Manager

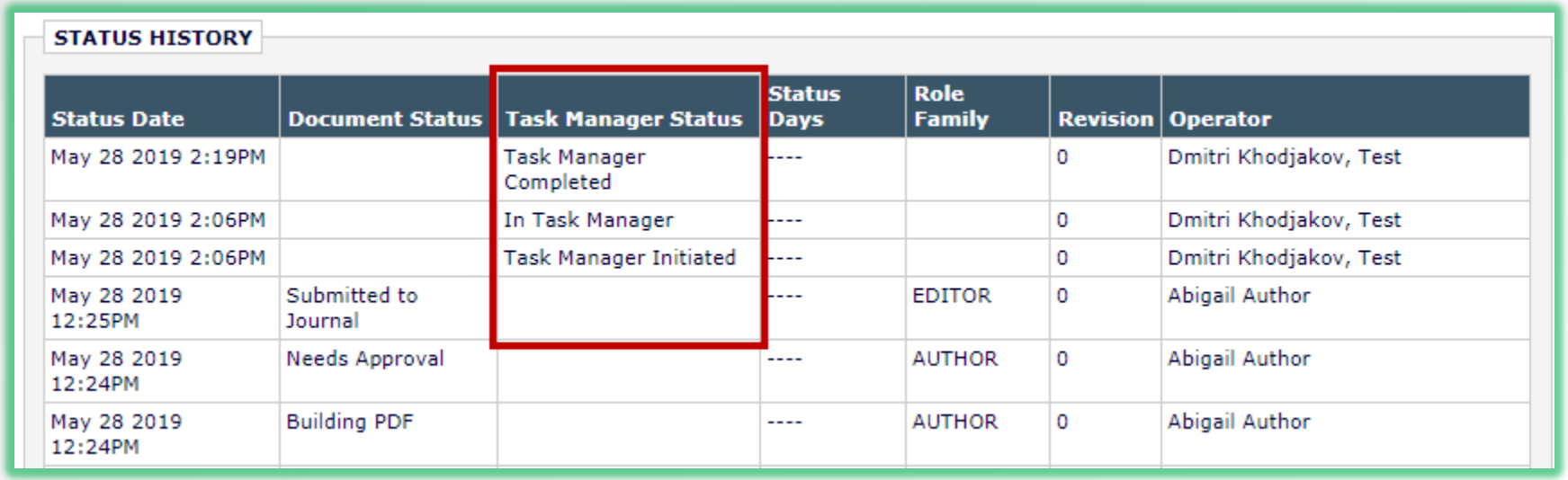
- Can be done manually using “End Task Manager” link.
- Available when no TM tasks are pending.
- Removes submission from “View All Submissions in Task Manager” folder.
- Can occur automatically:
  - When a task is completed
  - When production is initiated
  - When final disposition is set



History

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

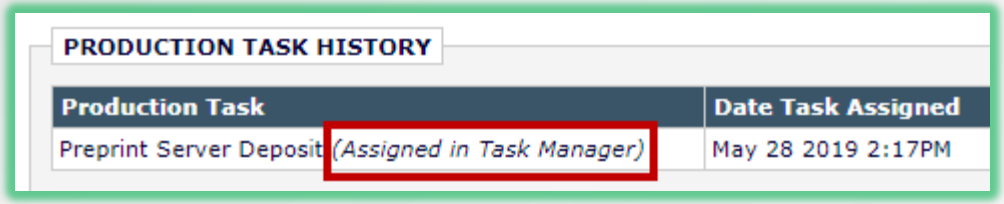




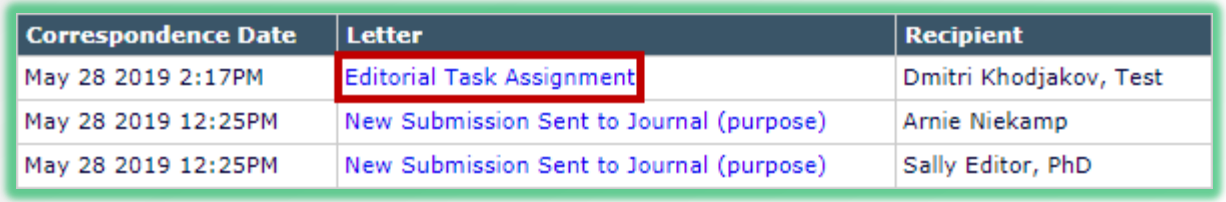
Status Date	Document Status	Task Manager Status	Status Days	Role Family	Revision	Operator
May 28 2019 2:19PM		Task Manager Completed	----		0	Dmitri Khodjakov, Test
May 28 2019 2:06PM		In Task Manager	----		0	Dmitri Khodjakov, Test
May 28 2019 2:06PM		Task Manager Initiated	----		0	Dmitri Khodjakov, Test
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.



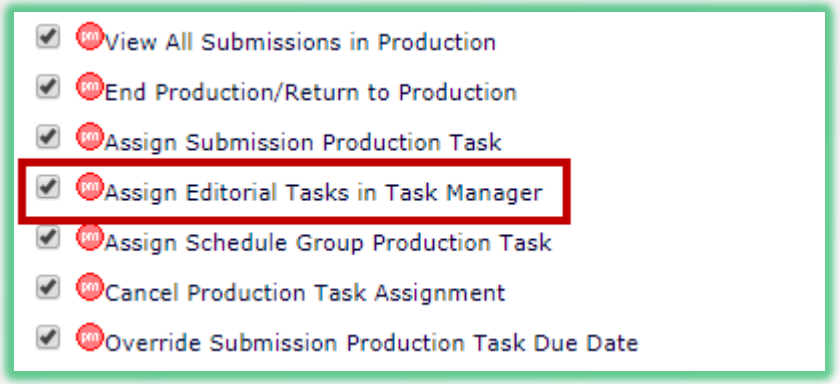
Details

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

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

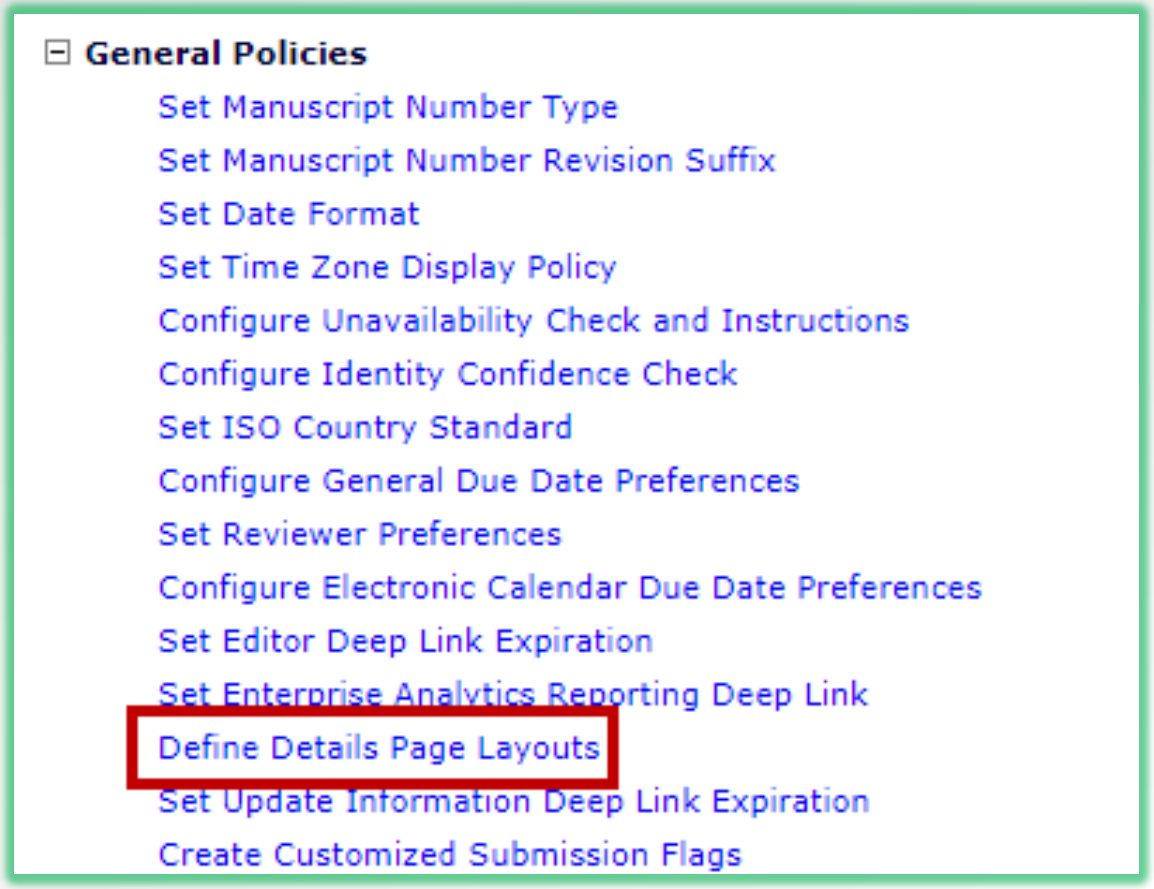


RoleManager

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

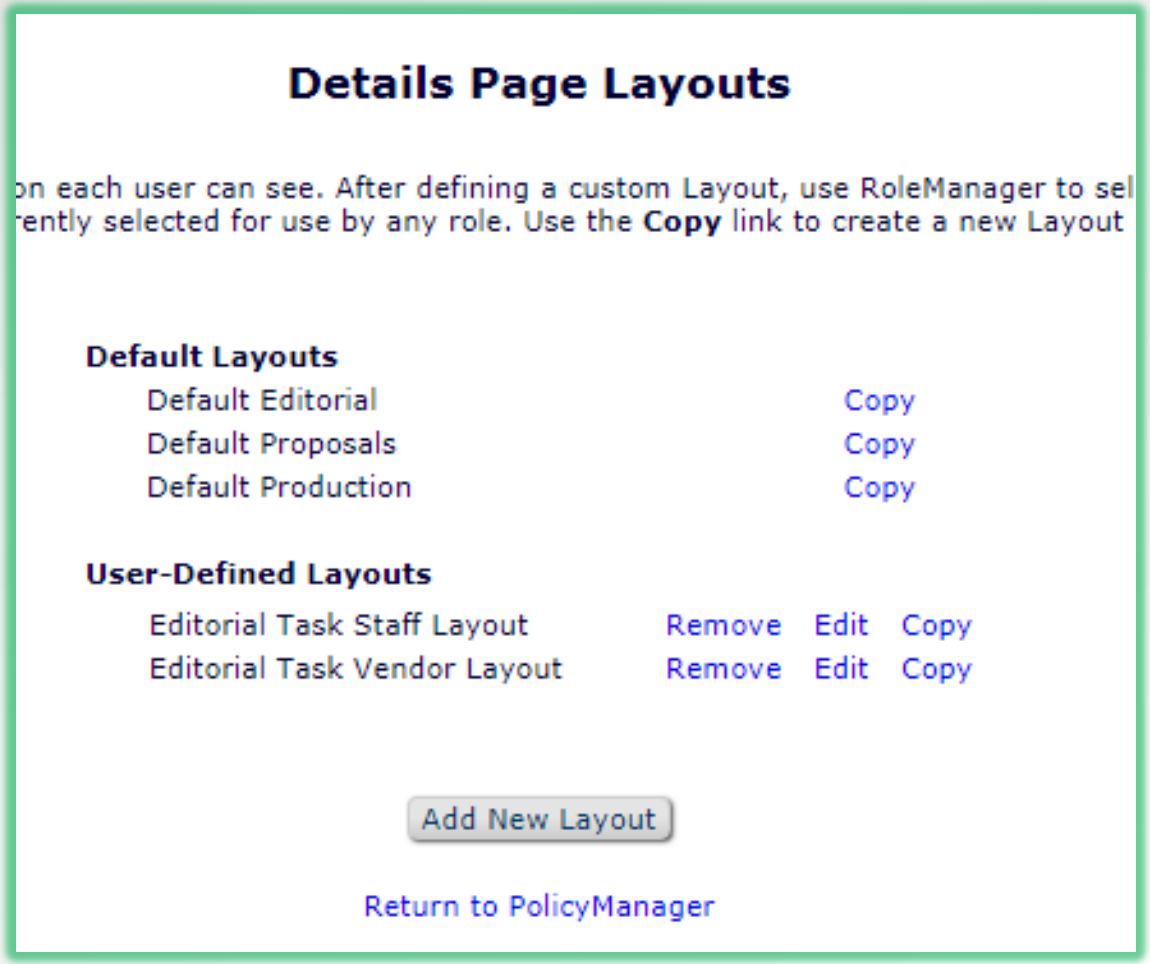
Define Details Page Layouts

- 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



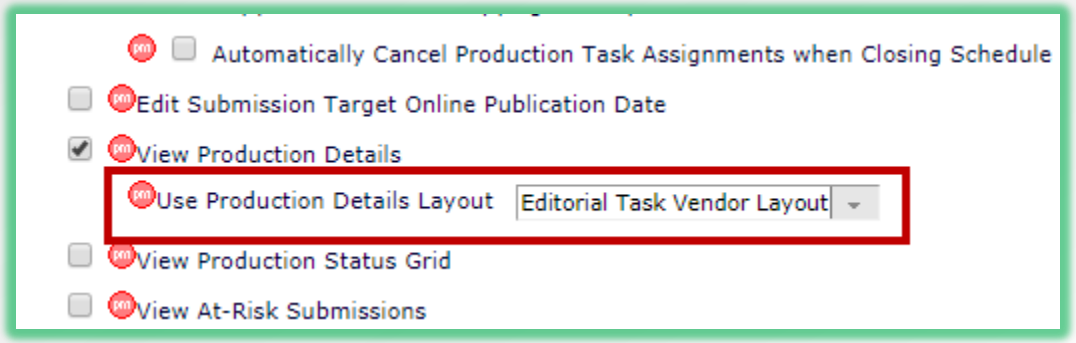
Define Details Page Layouts

- 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



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

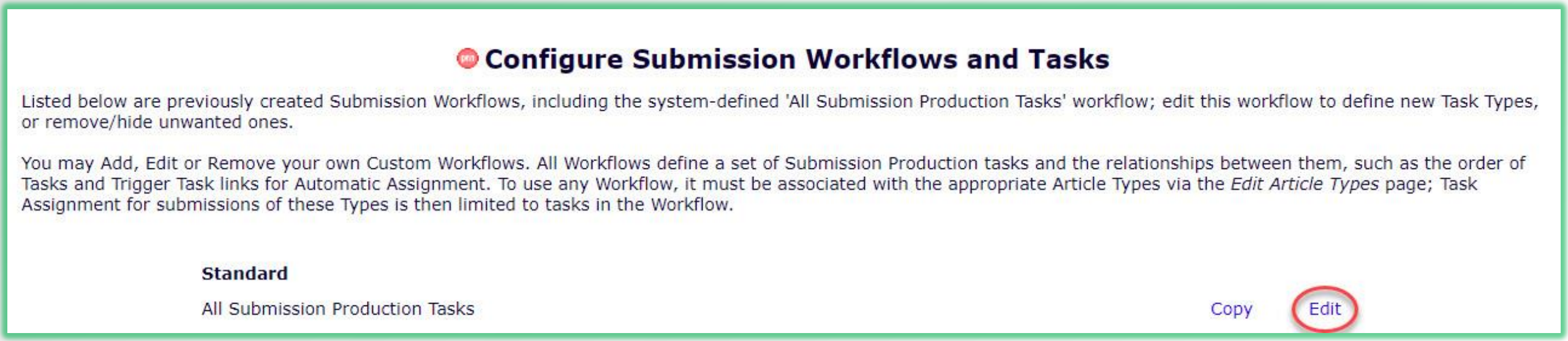


Configuring a Task Manager Workflow

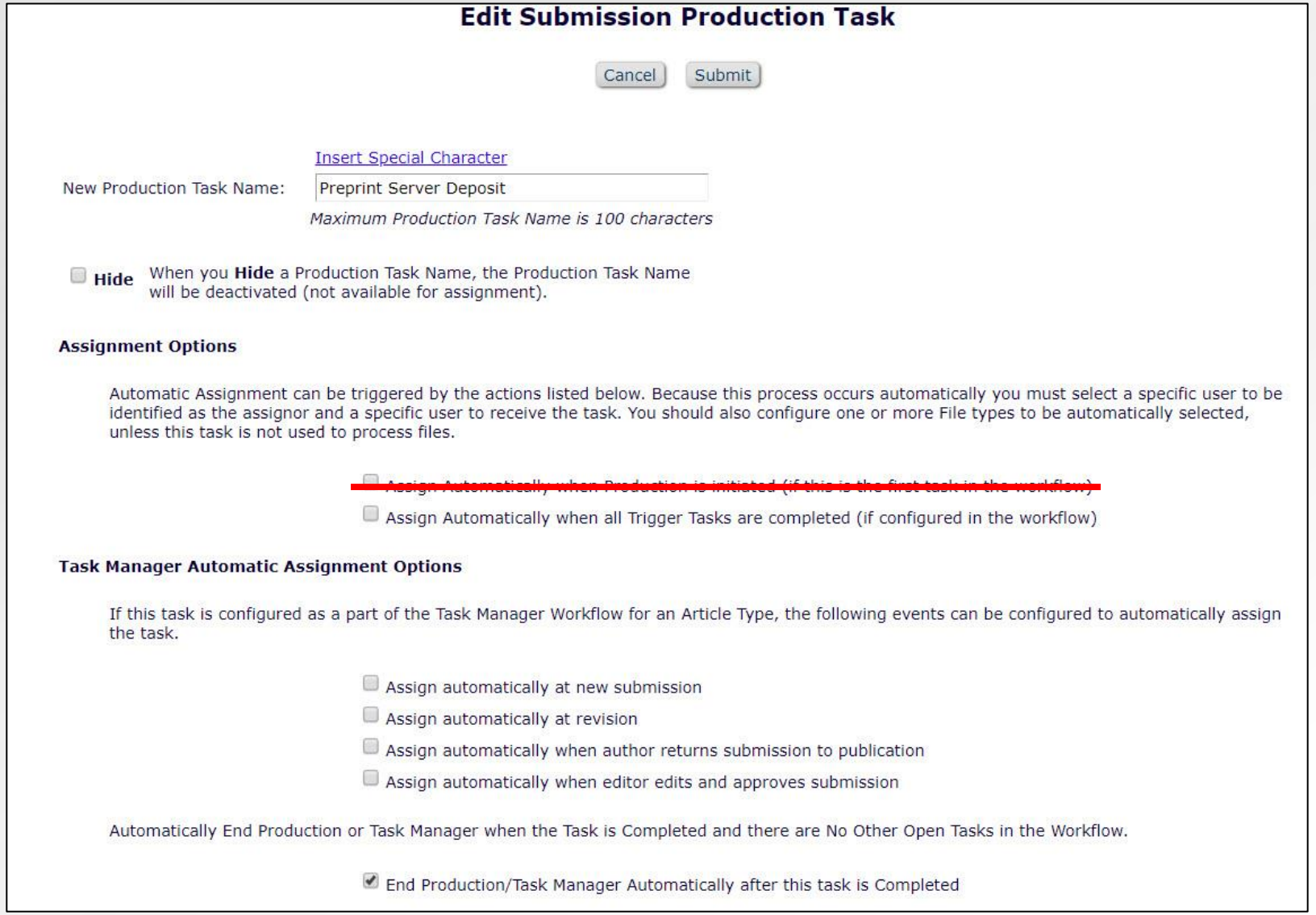
- Task Manager workflows are configured in the same place as Production workflows.
- All workflows are constructed from the same pool of tasks.

Configuring a Task Manager Workflow

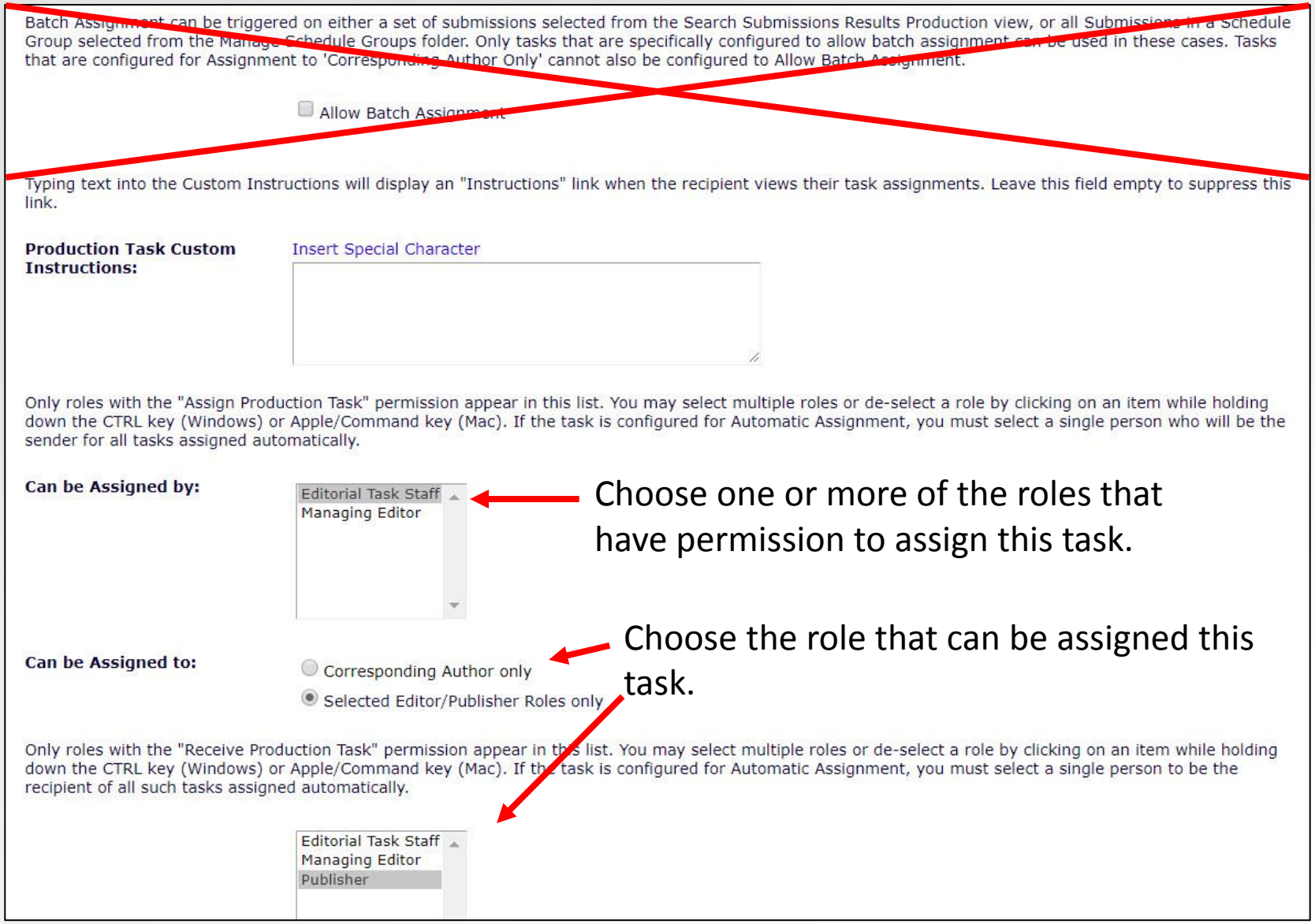
- Your task library. Click Edit to add or configure tasks.



Configuring the Task



Configuring the Task

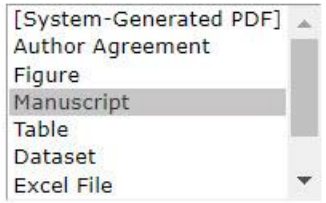


Configuring the Task

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.



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.

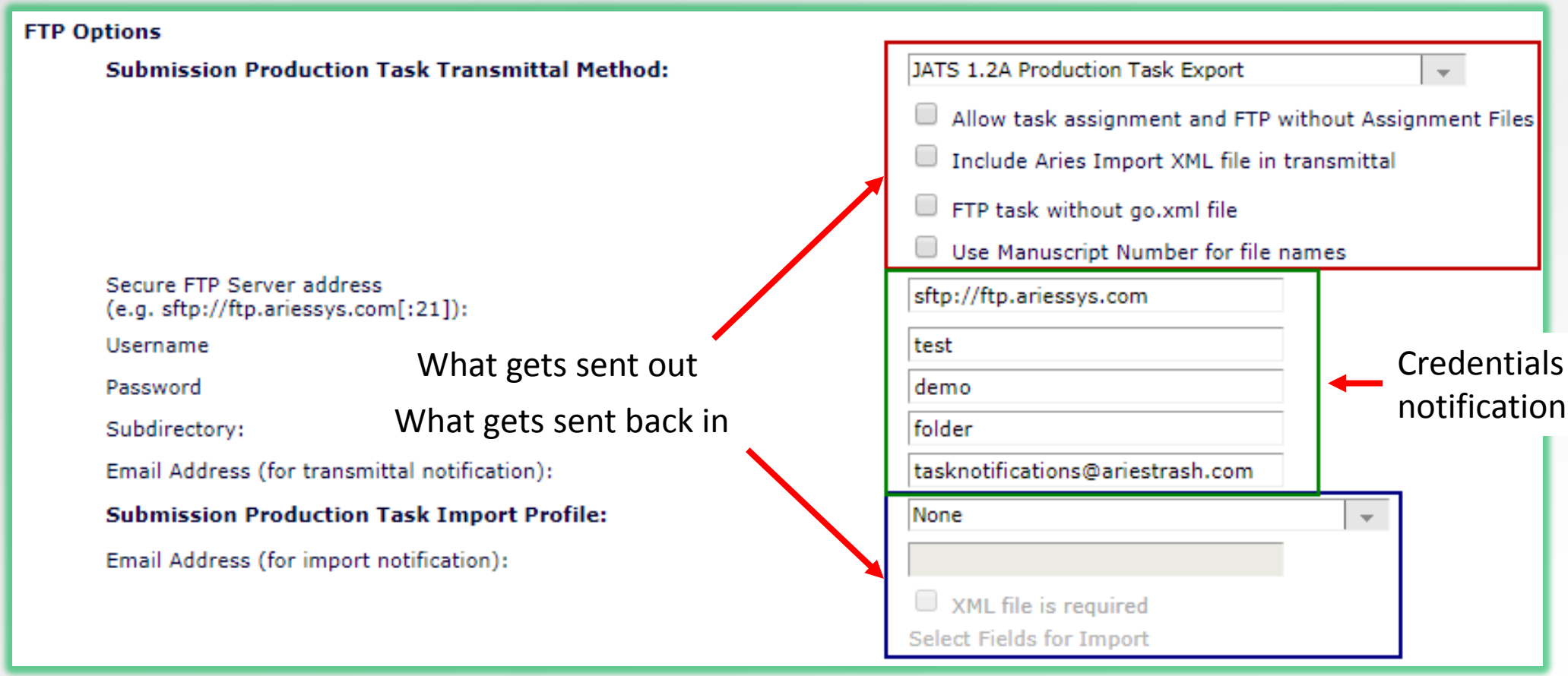
☐ Allow Recipient to Reassign

Allows assignee to reassign to someone else to perform this task

Questionnaire Options

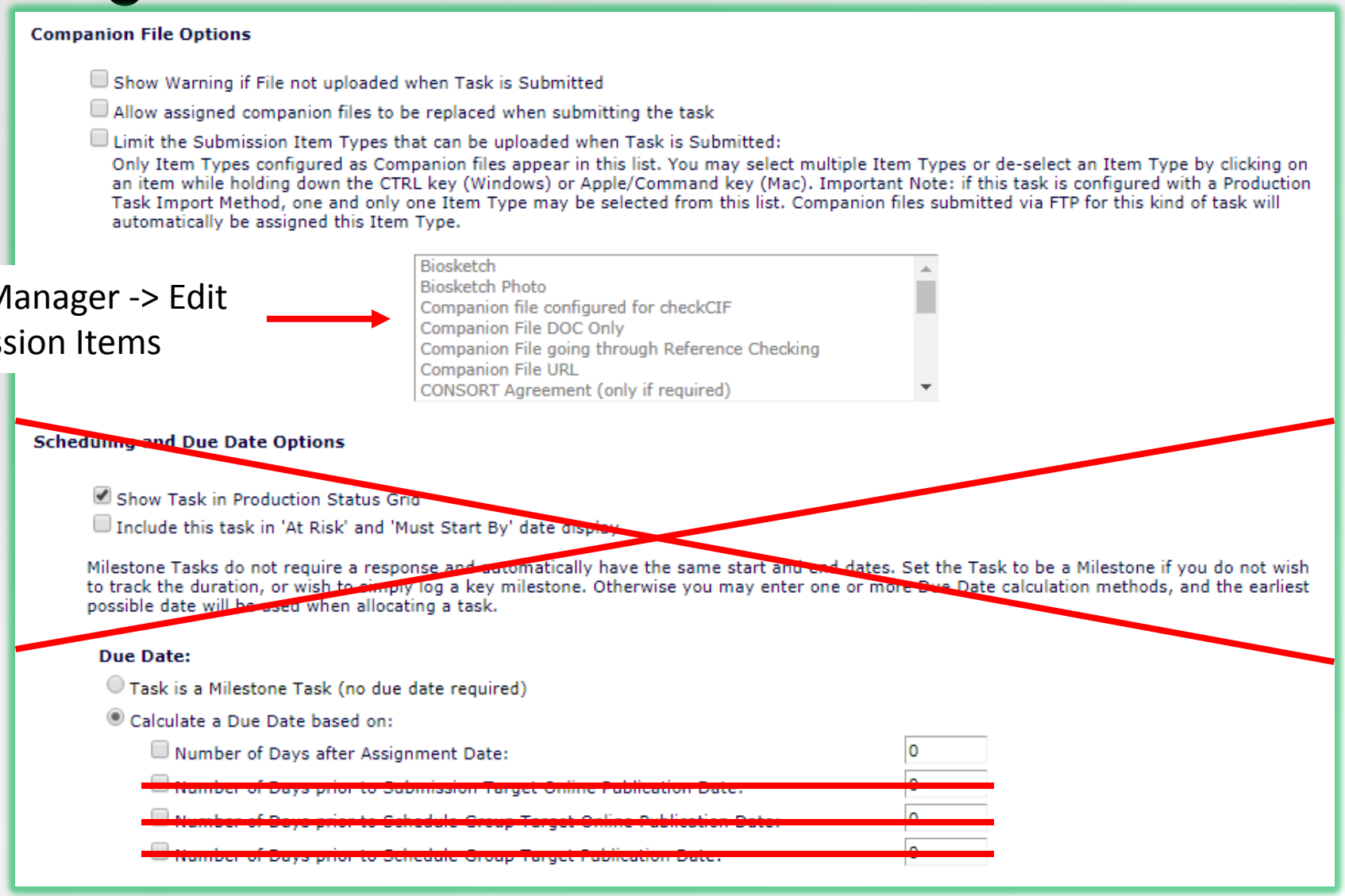
Use Custom Questionnaire: None

Configuring the Task



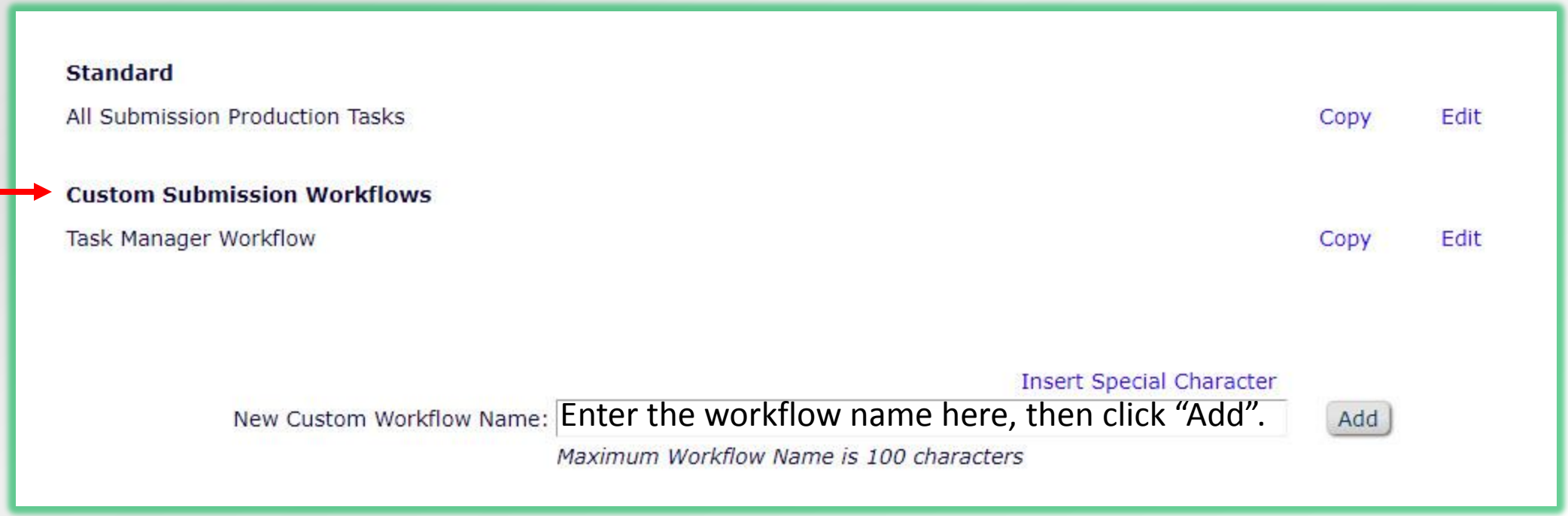
Configuring the Task

PolicyManager -> Edit Submission Items

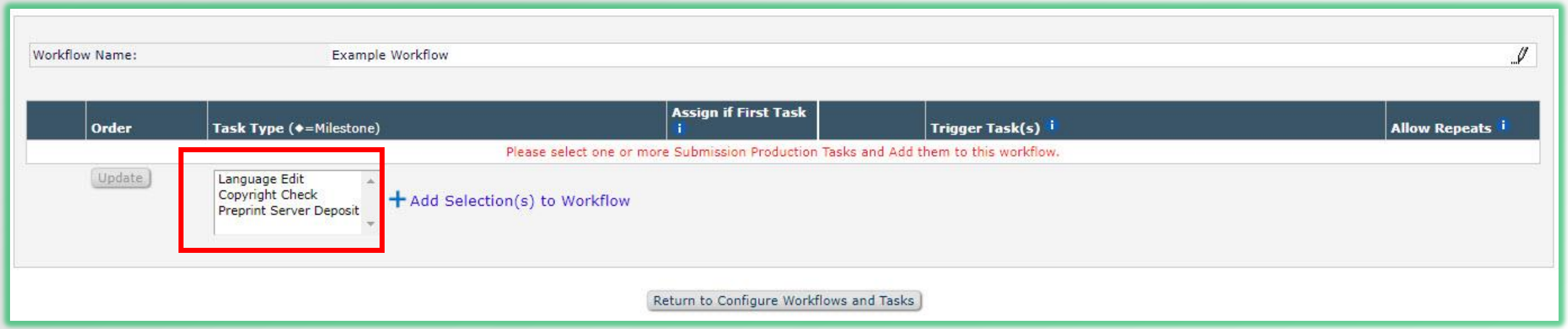


Configuring the Workflow

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



Configuring the Workflow



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

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]		✎		

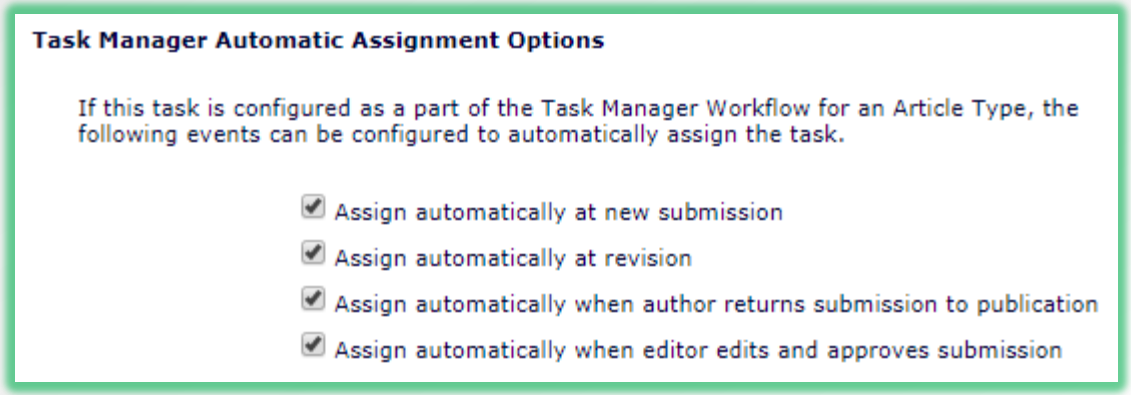
Return to Configure Workflows and Tasks

	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]		💾 ↩	Language Edit Copyright Check	◉ No ○ Yes

Return to Configure Workflows and Tasks

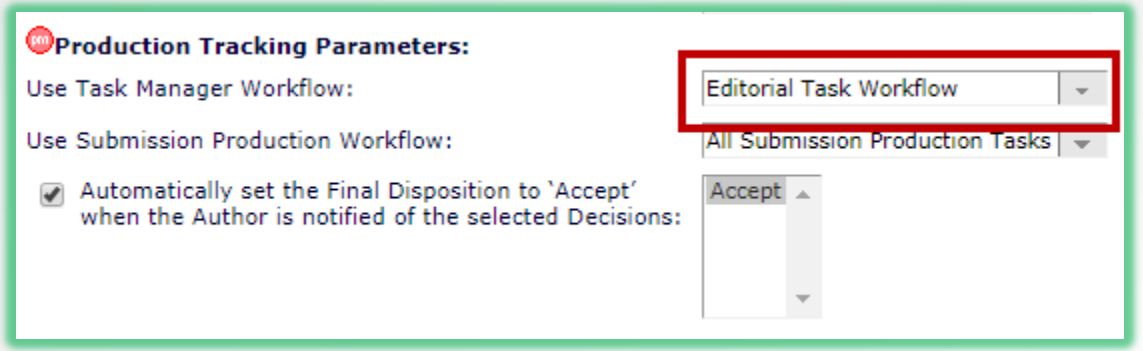
Automatic Triggers for Editorial Tasks

- 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.



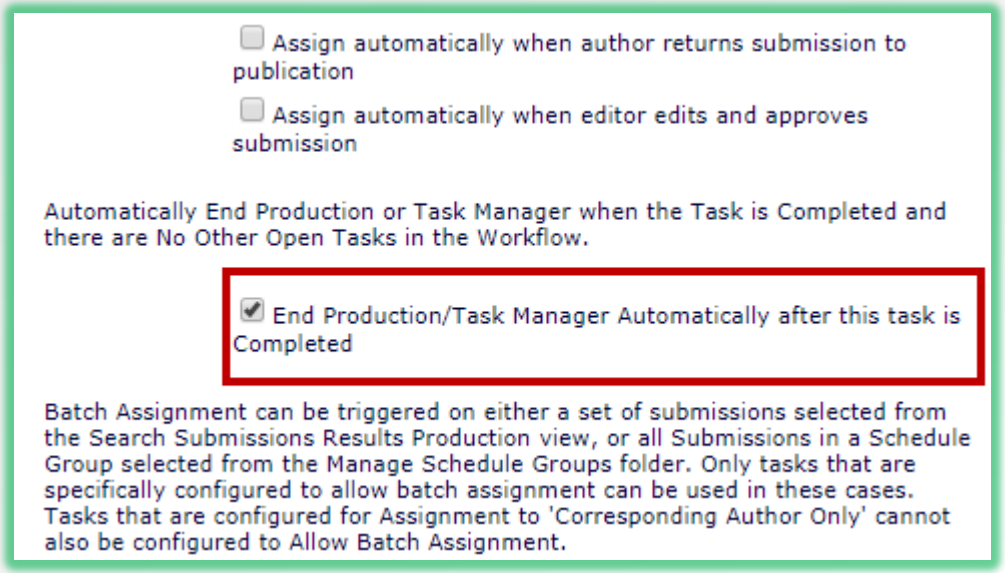
Select Task Manager Workflow

- 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.



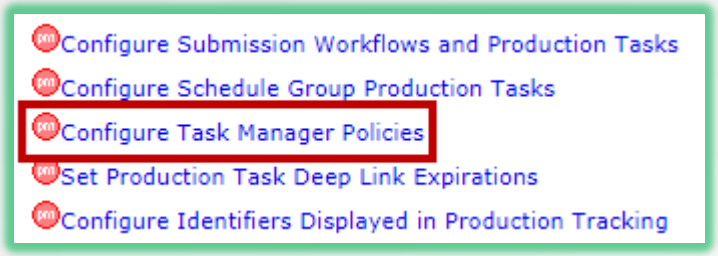
Automatically End Task Manager

- 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.



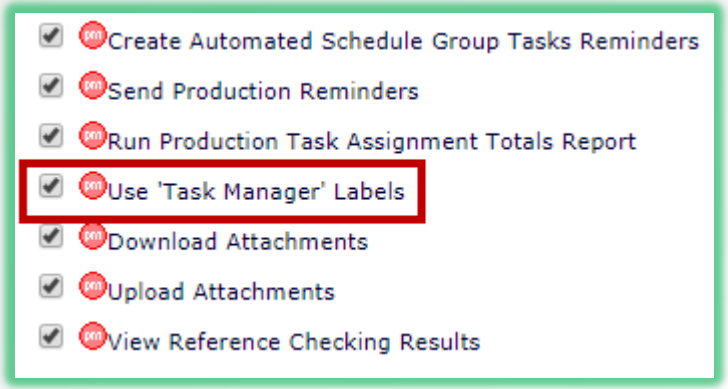
Automatically End Task Manager

- 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.



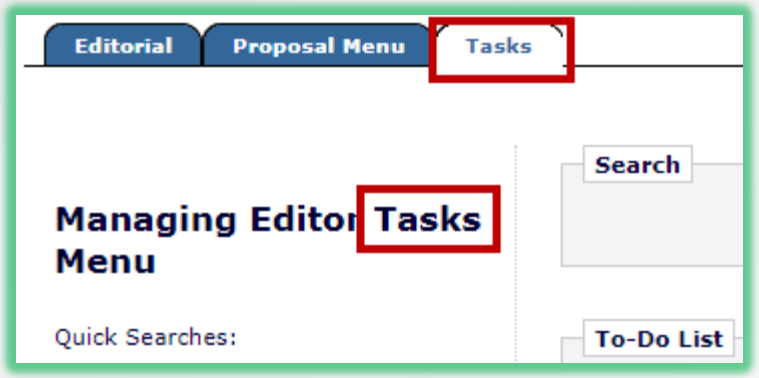
Using “Task Manager” Labels

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

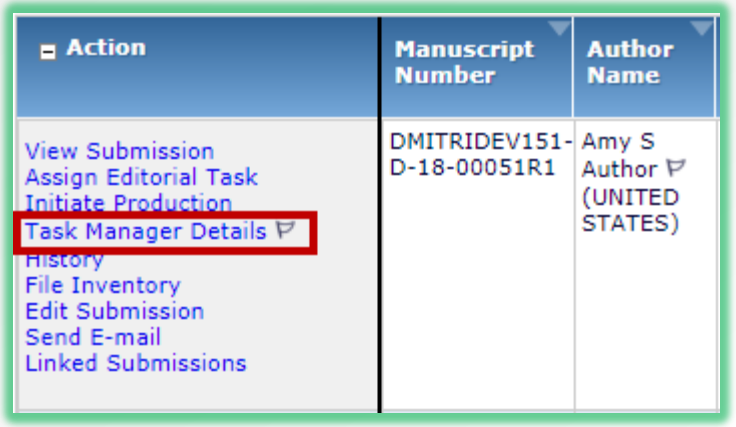


Using “Task Manager” Labels

- “Production Tasks” tab and menu are relabeled to “Tasks”



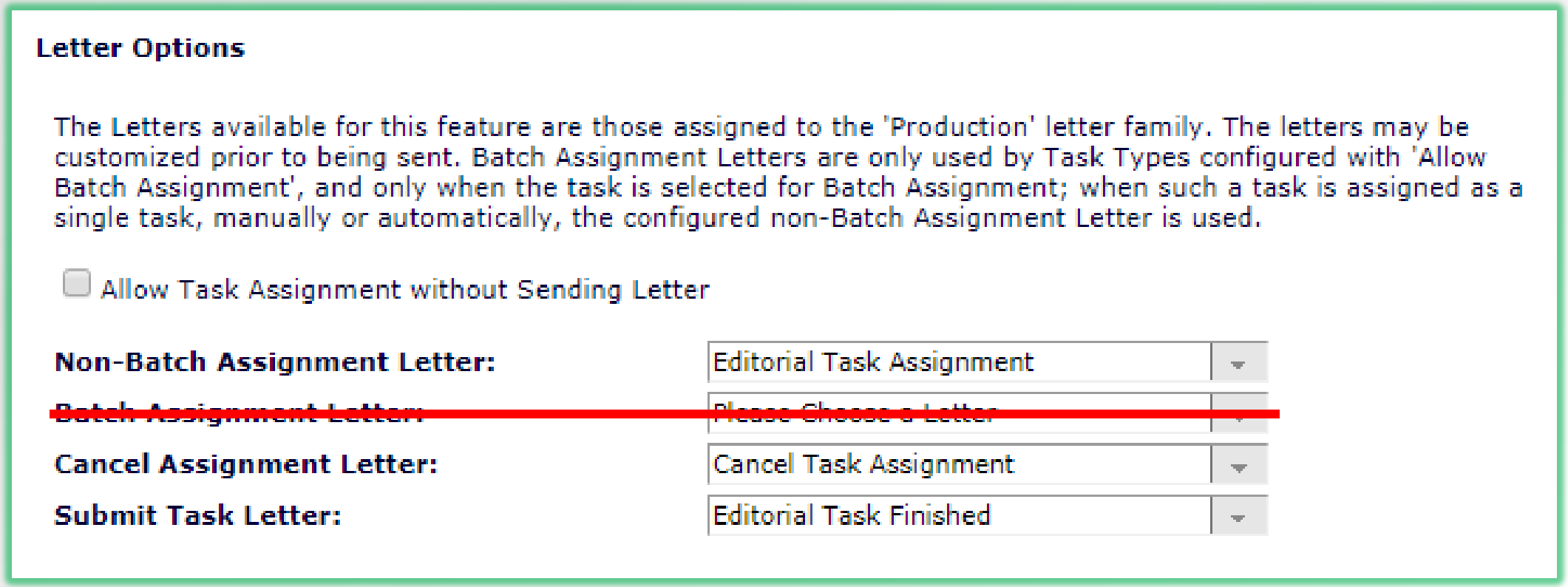
- “Production Details” become “Task Manager Details”



Task-Related Letters

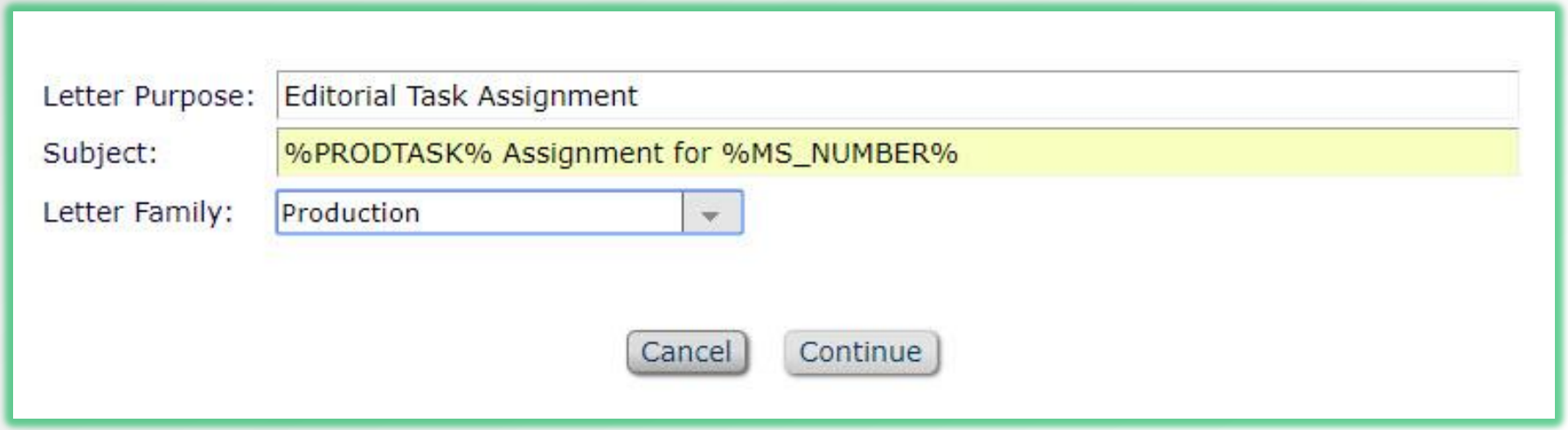
- There are 3 letters you might need for a task
  - Task Assignment Letter: sent to the person to whom the task is assigned.
  - Task Cancellation Letter: sent to the person to whom the task is assigned (if the task is cancelled).
  - Task Submission Letter: sent to the person who assigned the task (once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

Task-Related Letters

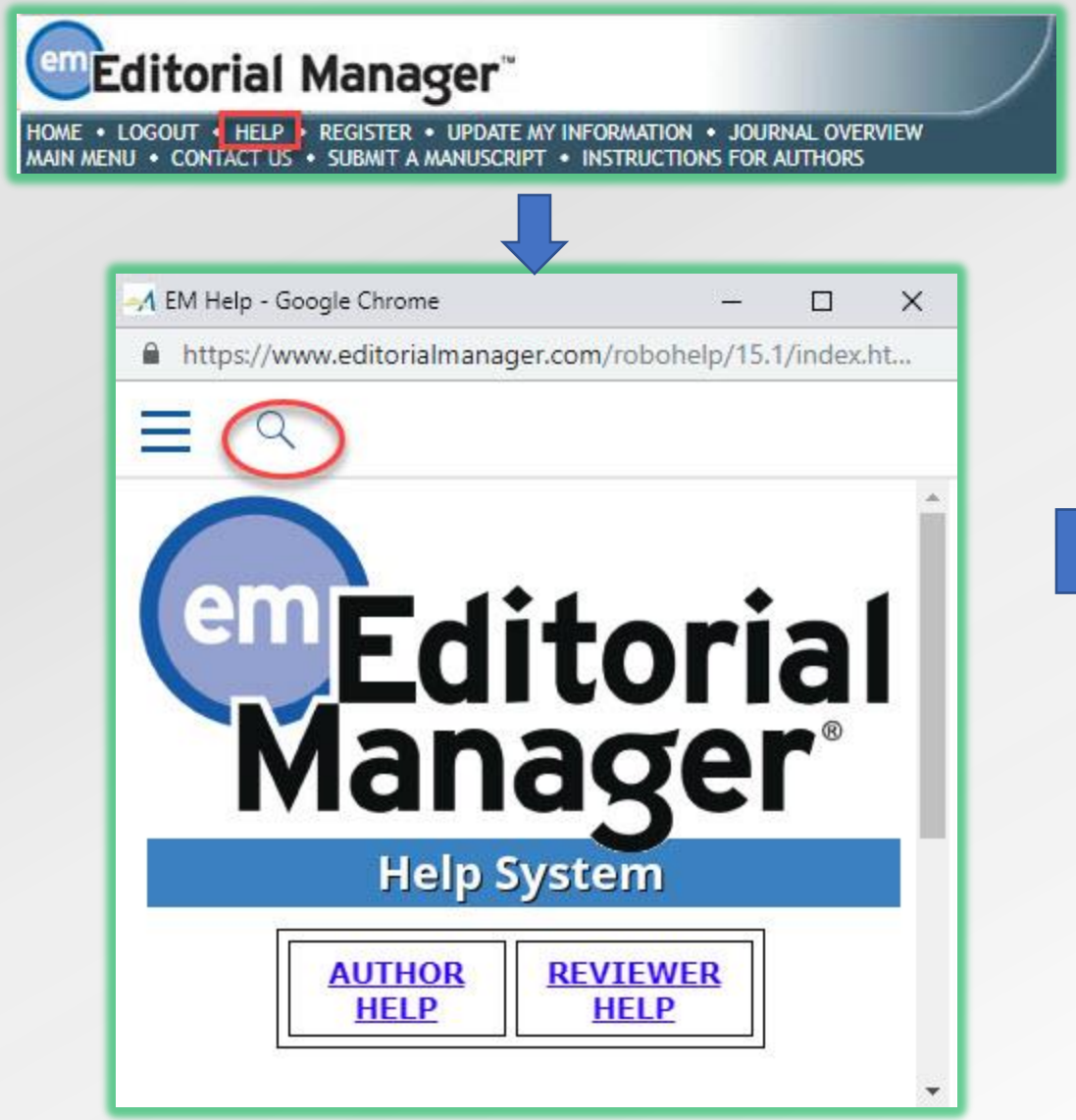


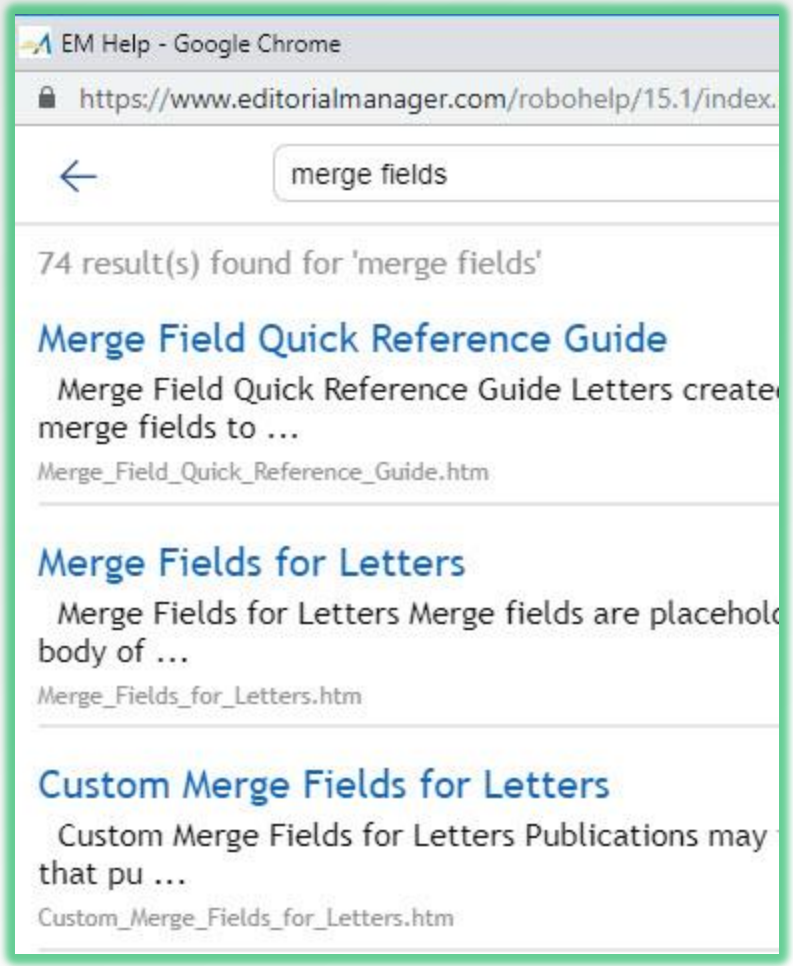
Task-Related Letters

- 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



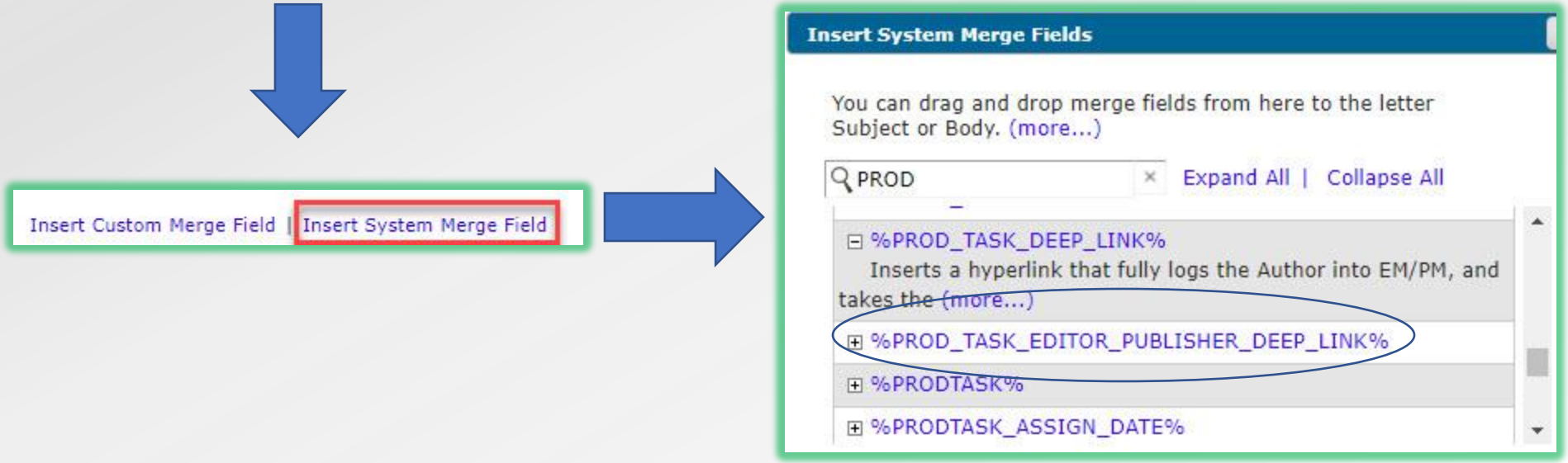
Help with Merge Fields





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		○	Edit	◉	Edit	Remove | Hide
Author - Other Author Verification	General	Author - Notify Other Authors	◉	Edit	○	Edit	Remove | Hide
Author - Other Author Verification Reminder	Author Reminder		◉	Edit	○	Edit	Remove | Hide



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.

QUESTIONS?

EMUG 2019

Task Manager Overview

Working with tasks in
production and editorial workflows

Dmitri Khodjakov
Business Systems Analyst
dkhodjakov@ariessys.com

Aries systems
Publish Faster. Publish Smarter.