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**EMUG** 2017  
BOSTON



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# Task/Export Use Cases

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# Introduction



# Agenda

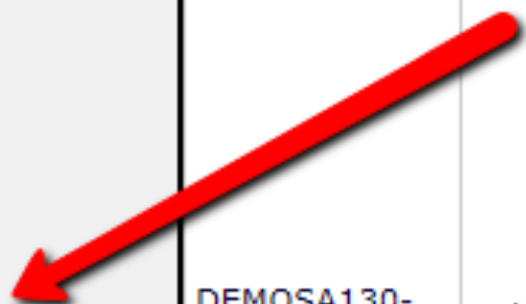
- Exporting basics
  - Editorial transmittals
  - Task transmittals
- Exporting details
- Multiple FTP sites
- Task imports
- Specialized exports
- Guest Speaker, Stephen Smith from KUDOS



**Files & Data -> FTP site**

# “Editorial Transmittal”

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name
<a href="#">View Submission Details</a>  <a href="#">History</a> <a href="#">Unassign Editor</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Solicit Commentary</a> <a href="#">Set Final Disposition</a> <a href="#">Initiate Production</a> <a href="#">Transmittal Form</a> <a href="#">View Reviews and Comments</a> <a href="#">Rescind Decision</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOSA130-D-17-00001	Original Study	New Category 1	Sample MS for EEMUG 2017. Hi Everyone!	<a href="#">Seb Atay</a> 





Setting the final disposition completes the peer-review process. You may only set a Final Disposition of "Accept" or "Reject" after you notify the author of the editor's decision.

Setting a Final Disposition of "Accept" may initiate production or trigger transmittal of data to the publisher if your publication is configured to do this. If you choose a Final Disposition of "Transfer" a list of possible recipients will display. After you have made your choice, you will have an opportunity to customize letters regarding the transfer. When this process is complete, the submission will be transferred.

Production Status : Not in Production

Final Disposition:








**Submission Metadata**
 Include metadata in release to production

Item Description	Value	
Manuscript Number	DEMOSA130-D-17-00001	<a href="#">Help</a>
Revision Number	0	<a href="#">Help</a>
Article Title	Sample MS for EEMUG 2017. Hi Everyone!	<a href="#">Help</a>
Article Type	Original Study	<a href="#">Help</a>
Initial Date Submitted	Jan 5 2017 8:09PM	<a href="#">Help</a>
DOI	<input type="text"/>	<a href="#">Help</a>
<b>CORRESPONDING AUTHOR INFORMATION</b>		
Title	Dr.	<a href="#">Help</a>
First Name	Seb	<a href="#">Help</a>
Middle Name		<a href="#">Help</a>
Last Name	Atay	<a href="#">Help</a>
E-mail Address	satay@ariessys.com	<a href="#">Help</a>
Country	ALBANIA	<a href="#">Help</a>
Notes to Production	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">Please expedite the production of this manuscript. It needs publishing in the February issue.</div>	<a href="#">Help</a>
ORCID	0000-0002-3516-0165	<a href="#">Help</a>
ORCID Authenticated	false	<a href="#">Help</a>
Please list any conflict of interest that you have below.	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">The conflict of interest is that through a process known as securitization several of the corporations that I refer to in this study own my debt which means that I am inclined to treat them exceptionally favourably</div>	
Funding Information	Office of Behavioral and Social Sciences Research <a href="http://dx.doi.org/10.13039/100000118777">http://dx.doi.org/10.13039/100000118777</a> Dr. Seb Atay	<a href="#">Help</a>
Manuscript Geographic Region Of Origin		<a href="#">Help</a>
Abstract		<a href="#">Help</a>
Final Decision Date	Jan 5 2017 8:11PM	<a href="#">Help</a>
Open Access		
Membership Number	None	

demosa130\_DEMOSA130-D-17-00001

Extract all files

Name	Type	Comp
 DEMOSA130-D-17-00001	Adobe Acrobat Document	
 DEMOSA130-D-17-00001	XML Document	
 fig 1	JPEG image	
 main MS	Microsoft Word Document	
 Table 1	Microsoft Excel Worksheet	

favorites  
downloads  
Recent Places  
desktop  
libraries  
documents  
music  
pictures  
videos  
computer  
windows7 (C:)  
DVD RW Drive (D:) Audio CD  
public (\\badger) (P:)  
work

# “Task Transmittal”

Action	Manuscript Number	Author Name	Article Title	P S
<a href="#">Assign Production Task</a> <a href="#">Assign to Schedule Group</a> <a href="#">Production Status Grid</a> <a href="#">Production Details</a> ▾ <a href="#">History</a> <a href="#">Transmittal Form</a> <a href="#">File Inventory</a> <a href="#">Edit Submission</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	DEMOSA130-D-17-00001	Seb Atay KF (ALBANIA)	Sample MS for EEMUG 2017. Hi Everyone!	M

**Assign Production Task For Manuscript Number: DEMOSA130-D-17-00001  
Seb Atay (ALBANIA): "Sample MS for EEMUG 2017. Hi Everyone!"**

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

**Schedule Group:**

No Schedule Group Assigned

**Production Task:**

Special Export to CE FTP

Cancel

Proceed with Selected Task








Cancel

Assign Task and Send Letter

Assign Task without Sending Letter

DEMOSA130-D-17-00001\_13

Include in library ▾ Share with ▾ Burn New folder

Name	Date modified	Type	Size
 demosa130_DEMOSA130-D-17-00001	06/01/2017 01:29	XML Document	5 KB
 DEMOSA130-D-17-00001	06/01/2017 01:29	Adobe Acrobat D...	934 KB
 fig 1	06/01/2017 01:29	JPEG image	49 KB
 main MS	06/01/2017 01:29	Microsoft Word D...	104 KB
 Table 1	06/01/2017 01:20	Microsoft Excel W...	10 KB

# Files

**Files – Data - FTP**



**What determines which files  
are sent?**

# Article Type Settings + Transmittal Form

# Article Type Settings

System Administration > PolicyManager > Submission Policies > Edit Article Types

Order	Article Type	Article Type Family	Invited	Editor/Publish Use Only
<input type="text" value="1"/>	Rapid Communication	Regular		<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<input type="text" value="2"/>	Rapid Communication 2	Regular		<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<input type="text" value="3"/>	Rapid Classification	Regular		<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<input type="text" value="4"/>	Original Study	Regular		<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>
<input type="text" value="5"/>	Editorial	Regular		<a href="#">Remove</a> <a href="#">Edit</a> <a href="#">Copy</a>



# Article Type Settings

System Administration > PolicyManager > Submission Policies > Edit Article Types

## Manuscript

Required for Submission:

Allow Offline Submission:

**Item Metadata:** Manuscript Word Count

Exclude from Reviewer PDF  
(for New and revised Submissions)

Publisher gets file:  
(for New and revised Submissions)

# Transmittal Form

Source Files		
Item Type	Item Description	File Name
PDF	PDF	
Figure	Figure	fig 1.jpg
Manuscript	Manuscript	main MS.docx
Table	Table	Table 1.xlsx

Include Item in Transmittal	I S I T
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input type="checkbox"/>	

# Task Settings + Task Assignment

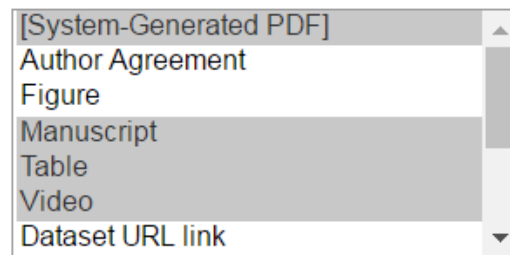
# Task Settings

## System Administration > PolicyManager > ProduXion Manager > Configure Submission Workflows and Production Tasks

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.



# Task Assignment

Description	Item Family	File Name	S
PDF			
Author Agreement	Default	Copyright Form.doc	10
Figure	Figure	fig 1.jpg	48
Manuscript	Document	main MS.docx	10
Table	Table	Table 1.xlsx	9

Allow Download
<input checked="" type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>



# Data

Files – **Data** - FTP

What determines what data  
are sent?

# Document Type Definition

None  
Single Destination Transmittal (UCP)  
Single Destination Transmittal (NLM)  
Single Destination Transmittal - NLM 3.0  
Single Destination Transmittal - Springer  
Single Destination Transmittal NLM 3.0 DTD v2  
Single Destination Transmittal - JATS 1.0A  
Single Destination Transmittal – Springer Book Series  
Single Destination Transmittal – Springer Open Peer Review  
Single Destination Transmittal - JATS 1.1A

None  
General Submission Production Task Export  
Aries Export  
NIHMS-PubMed Central Deposit  
NLM Production Task Export  
NLM 3.0 Production Task Export  
NLM 3.0 DTD v2 Export  
Highwire PAP Export  
JATS 1.0A Production Task Export  
JATS 1.1A Production Task Export

# DTD + Transmittal Form

## Submission Metadata

Include metadata in release to production

Item Description	Value	
Manuscript Number	DEMOSA130-D-17-00001	<a href="#">Help</a>
Revision Number	0	<a href="#">Help</a>
Article Title	Sample MS for EEMUG 2017. Hi Everyone!	<a href="#">Help</a>
Article Type	Original Study	<a href="#">Help</a>
Initial Date Submitted	Jan 5 2017 8:09PM	<a href="#">Help</a>
DOI	<input type="text"/>	<a href="#">Help</a>
<b>CORRESPONDING AUTHOR INFORMATION</b>		<a href="#">Help</a>
Title	Dr.	<a href="#">Help</a>
First Name	Seb	<a href="#">Help</a>
Middle Name		<a href="#">Help</a>
Last Name	Atay	<a href="#">Help</a>
E-mail Address	satay@ariessys.com	<a href="#">Help</a>
Country	ALBANIA	<a href="#">Help</a>
Notes to Production	Please expedite the production of this manuscript. It needs publishing in the February issue.	<a href="#">Help</a>
ORCID	0000-0002-3516-0165	<a href="#">Help</a>
ORCID Authenticated	false	<a href="#">Help</a>
Please list any conflict of interest that you have below.	The conflict of interest is that through a process known as securitization several of the corporations that I refer to in this study own my debt which means that I am inclined to treat them exceptionally favourably	
Funding Information	Office of Behavioral and Social Sciences Research <a href="http://dx.doi.org/10.13039/100000118">http://dx.doi.org/10.13039/100000118</a> 777 Dr. Seb Atay	<a href="#">Help</a>
Manuscript Geographic Region Of Origin		<a href="#">Help</a>
Abstract		<a href="#">Help</a>
Final Decision Date	Jan 5 2017 8:11PM	<a href="#">Help</a>
Open Access		
Membership Number	None	

# Custom Question Settings

System Administration > PolicyManager > Questionnaire Policies >  
Create Custom Questions

### Integration Options ?

Include in Editorial Transmittal  
 Include in Production Task Transmittal  
 Transmit as Author Note/Footnote

Custom Metadata ID: ?

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

#### PDF Cover Page ?

 Display

#### Manuscript Details

 Display  
Help Text:

#### Transmittal Form ?

 Display  
 Editable  
 Required  
Help Text:

```
<history>
  <date date-type="received">
    <day>05</day>
    <month>01</month>
    <year>2017</year>
  </date>
  <date date-type="accepted">
    <day>05</day>
    <month>01</month>
    <year>2017</year>
  </date>
</history>
<funding-group>
  <award-group id="IDOETDAC2">
    <funding-source>Office of Behavioral and Social Sciences Research<named-content content-type="funder-id">http://dx.doi.org/10.13039/100000118</named-content>
    <award-id>777</award-id>
    <principal-award-recipient>Seb Atay</principal-award-recipient>
  </award-group>
</funding-group>
<counts>
  <fig-count count="0" />
</counts>
<custom-meta-group>
  <custom-meta id="conflict-of-interest">
    <meta-name>Please list any conflict of interest that you have below. </meta-name>
    <meta-value>The conflict of interest is that through a process known as securitization several of the corporations that I refer to in this study own my debt
  </custom-meta>
  <custom-meta>
    <meta-name>Black and White Image Count</meta-name>
    <meta-value>0</meta-value>
  </custom-meta>
  <custom-meta>
    <meta-name>Color Image Count</meta-name>
    <meta-value>0</meta-value>
  </custom-meta>
  <custom-meta>
    <meta-name>Production Notes</meta-name>
    <meta-value>Make sure that you expedite the production of this paper. Needs publishing in Feb issue.</meta-value>
  </custom-meta>
</custom-meta-group>
</article-meta>
```



# Important Notes

1

Even if the data exists in the system, if the transmittal form is not configured correctly, that data might not be sent out in the XML

2

Even if the data exists in the system and the transmittal form is configured correctly, the DTD you use might mean that the information is not being transferred



# FTP

Files – Data - **FTP**

**What determines where the files and data are sent?**

## Transmittal FTP Parameters for: Single Destination Transmittal - JATS 1.1A

### Information for FTP Server #1:

FTP Server Address:

(e.g. developer.ariessc.com)

Username:

Password:

Subdirectory

### Information for Email Destination #1:

Email Address for transmittal success  
notification:

Email Address for transmittal failure  
notification:

### FTP Options

**Submission Production Task Transmittal Method:**

JATS 1.1A 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

FTP Server address  
(e.g. ftp.ariessys.com):

Username

Password

Subdirectory:

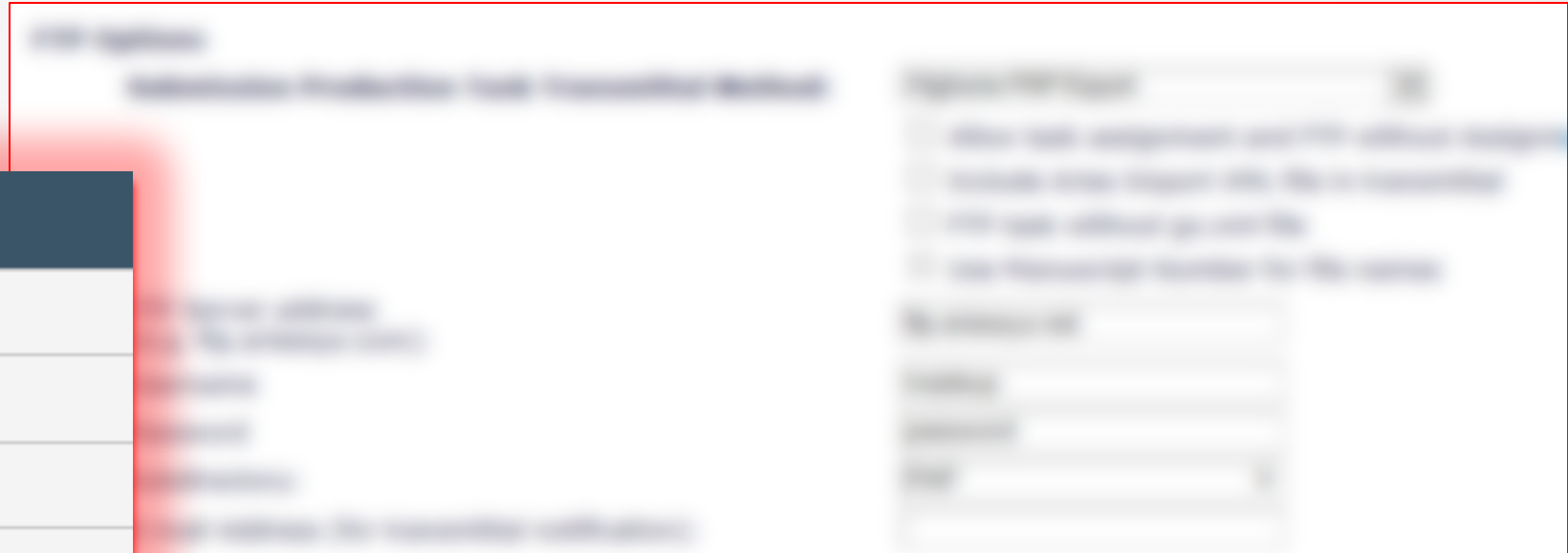
E-mail Address (for transmittal notification):

**Problem: more than one FTP**

No problem.



Task Type (◆ =Milestone)
◆ PRE Export [Edit]
◆ AA copy to Author [Edit]
Files to Vendor [Edit]
◆ Highwire PAP Export [Edit]
◆ PubMed Deposit [Edit]
Final Files Approved [Edit]
Special Export to CE FTP [Edit]



**Production Task Transmittal Method:**

JATS 1.1A 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

FTP Server address  
(e.g. ftp.ariessys.com):

Username

Password

Subdirectory:

E-mail Address (for transmittal notification):

# Task Imports

# Task Import - files

Subdirectory:

E-mail Address (for transmittal notification):

**Submission Production Task Import Profile:**

General Submission Production Task Import ▼

E-mail Address (for import notification):

XML file is required

Select Fields for Import

# Task Import - metadata

## FTP Options

**Submission Production Task Transmittal Method:**

JATS 1.1A 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

FTP Server address  
(e.g. ftp.ariessys.com):

**Submission Production Task Import Profile:**

Aries Import ▼

E-mail Address (for import notification):

[Select Fields for Import](#) [Select Fields for Import](#)

## Select Fields For Import

Select the fields to be imported for this production task. Identifying information is designated with a check mark and cannot be overwritten during import.

These fields will also be written to the Aries Import XML file sent in the production task transmittal, if the checkbox "Include Aries Import XML file in the transmittal" is selected on the Production Task configuration page.

[Expand All](#)

[Collapse All](#)

**+ Identifying Information:**

**- General Manuscript Information:**

- Article Title
- Short Title
- Abstract
- Target Online Publication Date
- Actual Online Publication Date
- Publication Date
- Print Pages of Article
- Page Range
- Publication Start Page
- Publication End Page
- Publication Volume Number

# Specialized Exports

# Highwire Export

## FTP Options

**Submission Production Task Transmittal Method:**

FTP Server address  
(e.g. ftp.ariessys.com):  
Username  
Password

- None
- General Submission Production Task Export
- Aries Export
- NIHMS-PubMed Central Deposit
- NLM Production Task Export
- NLM 3.0 Production Task Export
- NLM 3.0 DTD V2 Export
- Highwire PAP Export
- JATS 1.0A Production Task Export
- PRE Transmittal Production Task Export
- JATS 1.1A Production Task Export
- JATS 1.1A V2 Production Task Export

ut Assignment Files

mittal

s

# PMC Export

## FTP Options

**Submission Production Task Transmittal Method:**

- None
- General Submission Production Task Export
- Aries Export
- NIHMS-PubMed Central Deposit
- NLM Production Task Export
- NLM 3.0 Production Task Export
- NLM 3.0 DTD v2 Export
- Highwire PAP Export
- JATS 1.0A Production Task Export
- PRE Transmittal Production Task Export
- JATS 1.1A Production Task Export
- JATS 1.1A V2 Production Task Export

FTP Server address  
(e.g. ftp.ariessys.com):

Username

Password

Subdirectory:

at Assignment Files

mittal

s



# PMC Caveats

- Author approval and deposit done outside system
- Cannot be used if depositing directly to PMC

# PMC Setup

- Publication recognized by NLM
- Publication has account with NIHMS
- Subdirectory set to 'upload'

# PMC Setup

- NLM TA code added as special metadata field

## Transmittal Policies

- Set Transmittal Method
- Select Manuscript Metadata Fields
- Add/Edit Manuscript Metadata Fields
- Select Corresponding Author Metadata Fields
- Add/Edit Author Metadata Fields
- Select Co-Author Metadata Fields
- Add/Edit General Metadata Fields**
- Add/Edit Submission Item Metadata
- Edit Submission Item Family Metadata
- Select Conference Submission Metadata Fields
- Edit Transmittal Form Layout
- Set Validation Options

## Edit Journal Defined General Metadata Field

Cancel

Submit

### Field Description:

[Insert Special Character](#)

NLM TA

*Maximum 256 characters*

### Field Type:

Text ▼

### Maximum Field Length:

200

*(A value from 1 to 200)*

### Default Value for Field:

*If 'None' is selected, an empty text box will appear if the checkbox 'Editable' is checked in the grid below.*

None

Single Value (enter value below)

[Insert Special Character](#)

TA code for your publication

# PMC Setup

- File descriptions must be unique
- Files must be from Default or Document Item types
- Don't send system PDF
- Embargoes set by AC

**But wait, there's more!**

Weekly Reports for

KUDOS 

# Create Custom Questions



## **Plain Language Summary**

Please enter your Plain Language Summary below. Your plain language summary should be a short, simple, non - technical explanation or lay summary (not an abstract). This will make it easier for people to find and understand your work. If your article is accepted for publication, the plain language summary will be made available through [Kudos](#).

### **Example 1:**

Sulfate is an important anion in biological systems. We have shown for the first time that small molecules can bind to sulfate and allow it to diffuse across lipid bilayer membranes. This was previously thought impossible as sulfate is very strongly bound to water. We have used  $^{33}\text{S}$  NMR experiments to confirm sulfate transport.

### **Example 2:**

Open Source Software (OSS) development and Human Computer Interaction (HCI) work have established their positions, but do they actually fit together? This paper examines if there is any hope of bringing HCI work into OSS context and if OSS and HCI philosophies can exist in the same project.

By providing this text, you consent to it being made available to Kudos, an online platform (not affiliated with Editorial Manager) which has been designed to help you increase your article's impact. Your use of Kudos' services is governed by the Kudos terms and conditions. You can read more about this [here](#).

# Enterprise Analytics Reporting

## Standard Reports



### Editorial Reports

Accept and Reject Decisions by Editor in selected timeframe

Accept and Reject Decisions in selected timeframe

Average Days to Decision by Editor

Completed Reviews Detail Report

Editor Submission Counts - All editors by Role

Editor Submission Counts - Editors at End of Chain

Impact Vizor - Published Article Export

Impact Vizor - Rejected Article Export

Kudos Report

People and Classifications

People and Institutions

People Detail Sheet Subreport

People List Subreport

Reviewer Thank-You List



**Stephen Smith**  
Sales Manager



# Review

