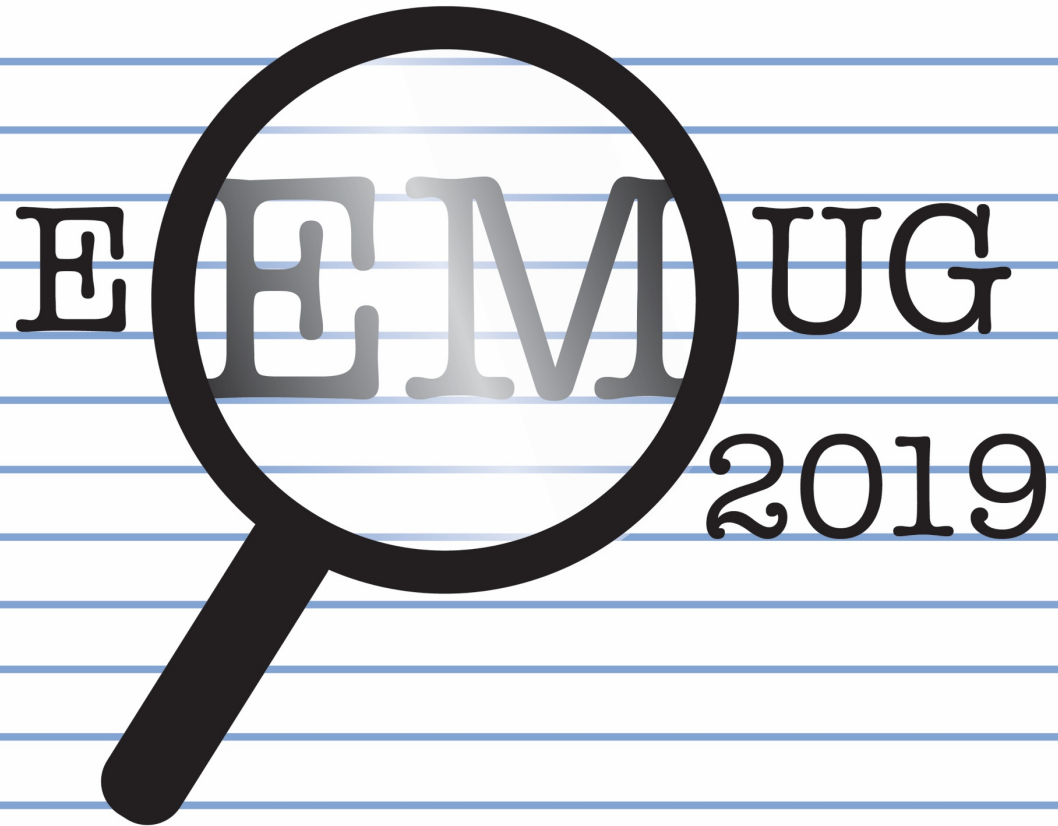


Welcome to



#EEMUG2019



# PM – Enterprise View

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# PM Enterprise View (“EV”)

- PM users have long asked for a way to manage production responsibilities across multiple publications without having to login and logout, or jump from one PM site to the next.
- **SOLUTION: New PM Enterprise View allows users to access submissions across multiple publications within a single interface from a new menu tab available on any of the PM sites.**



# Phased Implementation



- Version 16.1, currently in development
- Build the infrastructure
- Submission Tasks  
Assigned to Me folder
- Schedule Group Tasks  
Assigned to Me folder
- Search Submissions



- Version 17.0, currently in planning and design stage
- Plan to extend EV to remaining folders in Production Tracking Menu

# Pre-Requisites

- Publication must be a PM customer
- Publication must have a UDB (Unified Database)
- User has Editor or Publisher RoleManager permission to access EV
- User has Cross-Publication Login permissions and has configured a Cross-Publication Login List
- User has appropriate production-related permissions on publications in the group

# New Editor and Publisher RoleManager Permissions

**Edit Role Definition**

**Role Name:\***   
*Maximum Role name is 40 characters.*


Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.


---

Expand All

Collapse All

**New Submissions**  
**Editor Assignment**  
**Reviewer Invitations**  
**Editor Decisions**  
**Proposals/Commentaries**  
**General Searching and Viewing**  
**Edit Submission**  
**Discussion Forums**  
**Transmittal Form**  
**Sending E-mail**  
**Viewing and Editing People Data**  
**Flag Icons**  
**Proxy Activities**  
**Administrative and Reporting Functions**  
**Cross-Publication Login**  
**ProduXion Manager**  
**Enterprise View**

☒  Access Enterprise View Tab

☒  Search All Submissions in Enterprise View

Cancel

Submit

# Ability to make EV Menu a user's Default Login Menu

## Search People - Update Information

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

---

**George Stanley**

Self-Registered:  
Jan 18, 2017

Last Modified:  
Dec 11, 2018

User Information

Open Special Character Palette

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

Default Login Role:

Default Login Menu

Available as a Reviewer? ☐

Board Member? ☐

Forbidden as a Reviewer? ☐

Reviewer Role \*

Publisher Role \*

Enterprise View Menu

None

# New Enterprise View Menu

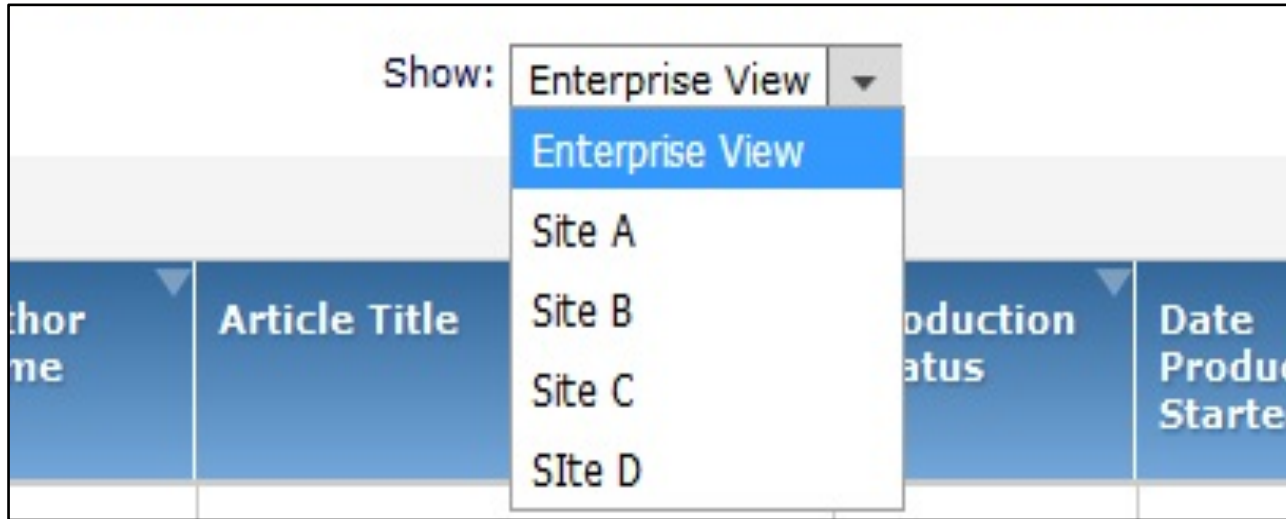
- Phase 1 includes:
  - Search Submissions
  - Submission Tasks Assigned to Me
  - Schedule Group Tasks Assigned to Me
  - Cross-Publication Enterprise Analytics Reporting (XEAR)





# EV Folders

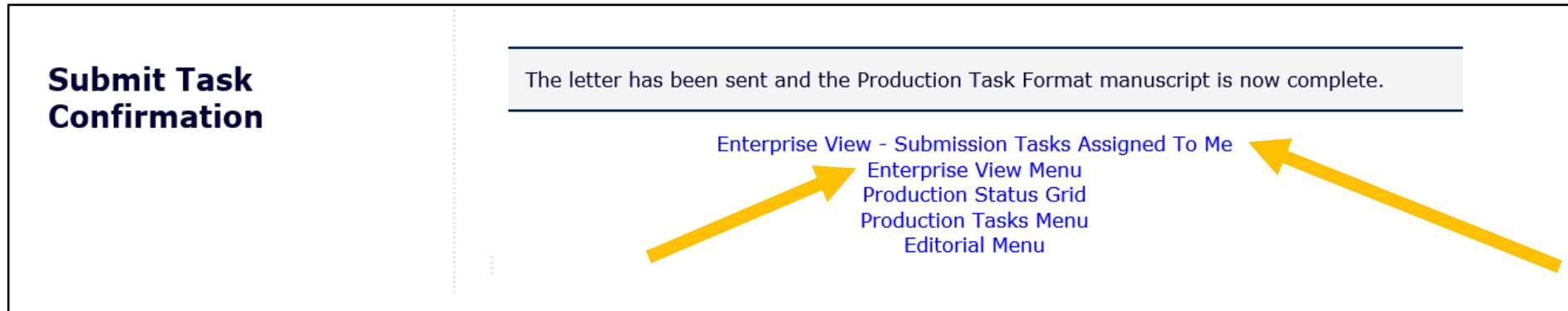
- EV folders take the existing PM folders and enhance them with:
  - Publication Code filter to refine the result set by publication



- New Publication Code column to easily identify which site the task belongs to
- PowerGrid format (like the existing Production Status Grid)

# EV Folders (continued)

- Full set of Action links for the records on the current site
- A 'Go To' link to carry out actions on other publications
- Enhanced navigation on confirmation pages, allowing the user to seamlessly flow back and forth amongst publications without having to consciously “switch to” another publication

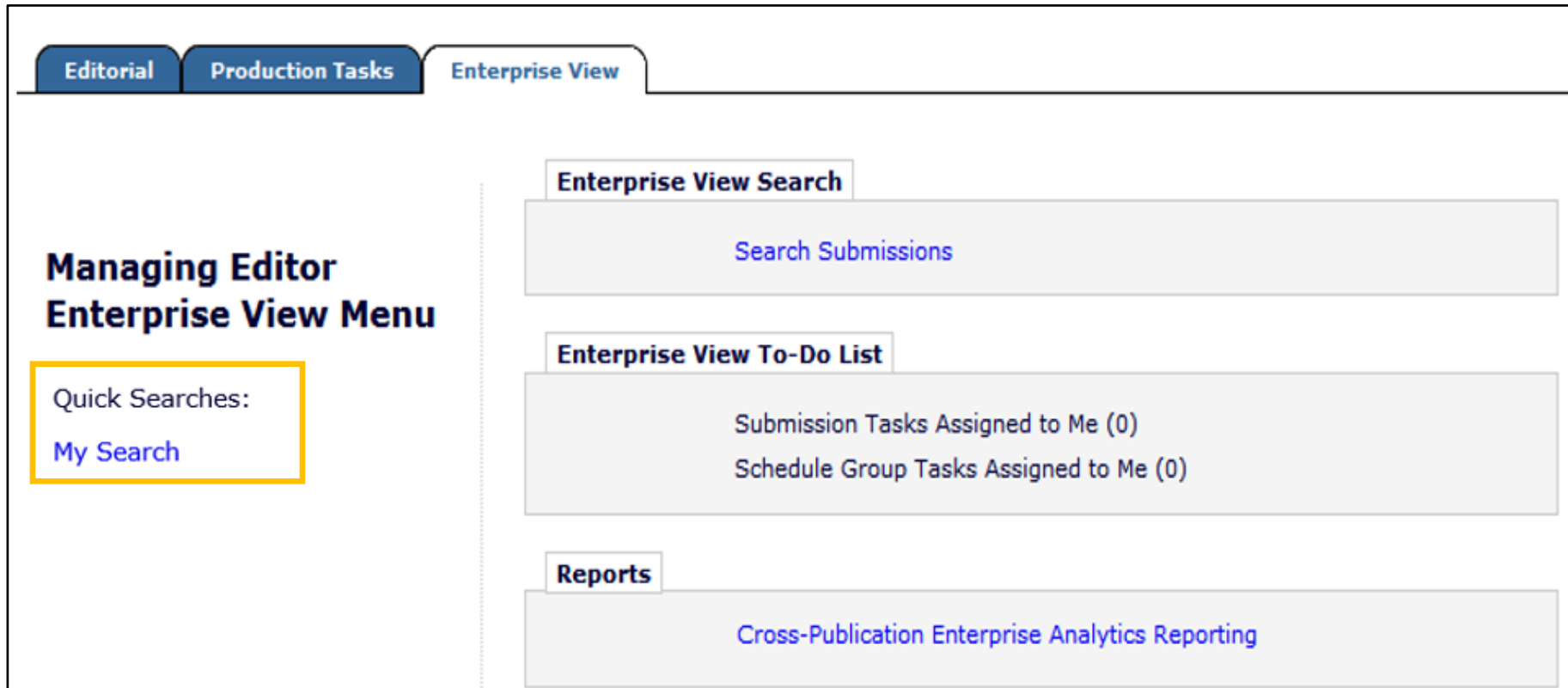


# EV Search Submissions

- EV Search Submissions takes the existing search functionality and enhances it with:
  - Four new search criteria:
    - Publication Code
    - Corresponding Production Editor First Name
    - Corresponding Production Editor Last Name
    - Date Most Recent Production Task Completed
  - Same PowerGrid format and Action links as EV folders

# EV Search Submissions (continued)

- Ability to Save searches and display them on the user's EV Menu
  - Note: Saved searches cannot be shared with other users in Phase 1



# Cross-Pub Batch Task Assignment

- Today, users can batch assign production tasks from Search Submissions – Search Results
- New in EV Search Results, users can batch assign tasks in a single workflow cross-publication

### Batch Assign Production Tasks

Please click 'Proceed' for the publication on which you wish to batch assign production tasks.

Publication Code	Publication Name	Submissions Selected	
SALLYDEV151	Sally's Test Site	3	Proceed
STACEYDEV151	Stacey's Test Site with a Really Long Journal Name	6	Proceed
TONYDEV151	Tony'sTest Site	1	Proceed

[Return to Search Results](#)  
[Enterprise View Menu](#)


# Cross-Pub Batch Task Assignment

- User steps through the selection of task and assignee, letter customization, upload of files
- On the confirmation page, there are navigation links to keep the user in “EV mode” and proceed with batch assignment on the next publication

## Batch Assign Production Task Confirmation

Devang Shah has been assigned the production task Task to be batch assigned for the following submissions. A letter was sent:

- Manuscript Number: Unassigned, DOI: 10.1029/STACEYTEST71.105. Stacey J Lavelle (UNITED STATES): "Lyme Disease in Adolescents"
- Manuscript Number: STACEYTEST91-D-11-00007, DOI: 10.1029/STACEYTEST71.104. Stacey J Lavelle (UNITED STATES): "Very Important Research"

 [Proceed with Next Task Assignment](#)  
[Return to Search Results](#)  
[Enterprise View Menu](#)  
  
[Production Status Grid](#)  
[Production Tasks Menu](#)  
[Main Menu](#)

# Cross-Pub Batch Task Assignment

- Clear indication of what is complete and what is left to do

### Batch Assign Production Tasks

The assignments resulting from your search query are complete.

Publication Code	Publication Name	Submissions Selected	
SALLYDEV151	Sally's Test Site	-	Complete
STACEYDEV151	Stacey's Test Site with a Really Long Journal Name	-	Complete
TONYDEV151	Tony's Test Site	-	Complete

[Return to Search Results](#)  
[Enterprise View Menu](#)

# Phase 2 – Version 17.0

- Still in planning and analysis phase, but the goal is to extend this functionality to the rest of the ProduXion Manager folders.

