Welcome to the 16TH Annual EMUG BOSTON

#EMUG2018

em Editorial Manager® pm ProduXion Manager®

ProduXion Manager Bootcamp

Introduction & Basic Overview

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Senior Account Coordinator
vscibilia@ariessys.com

16th Annual em Editorial Manager® User Group Meeting

Aries systems

Agenda

- What is ProduXion Manager?
- Getting Started
- Role Families
- How To Get a Submission into PM
- Production Status Grid
- Assigning a Production Task
- Schedule Groups

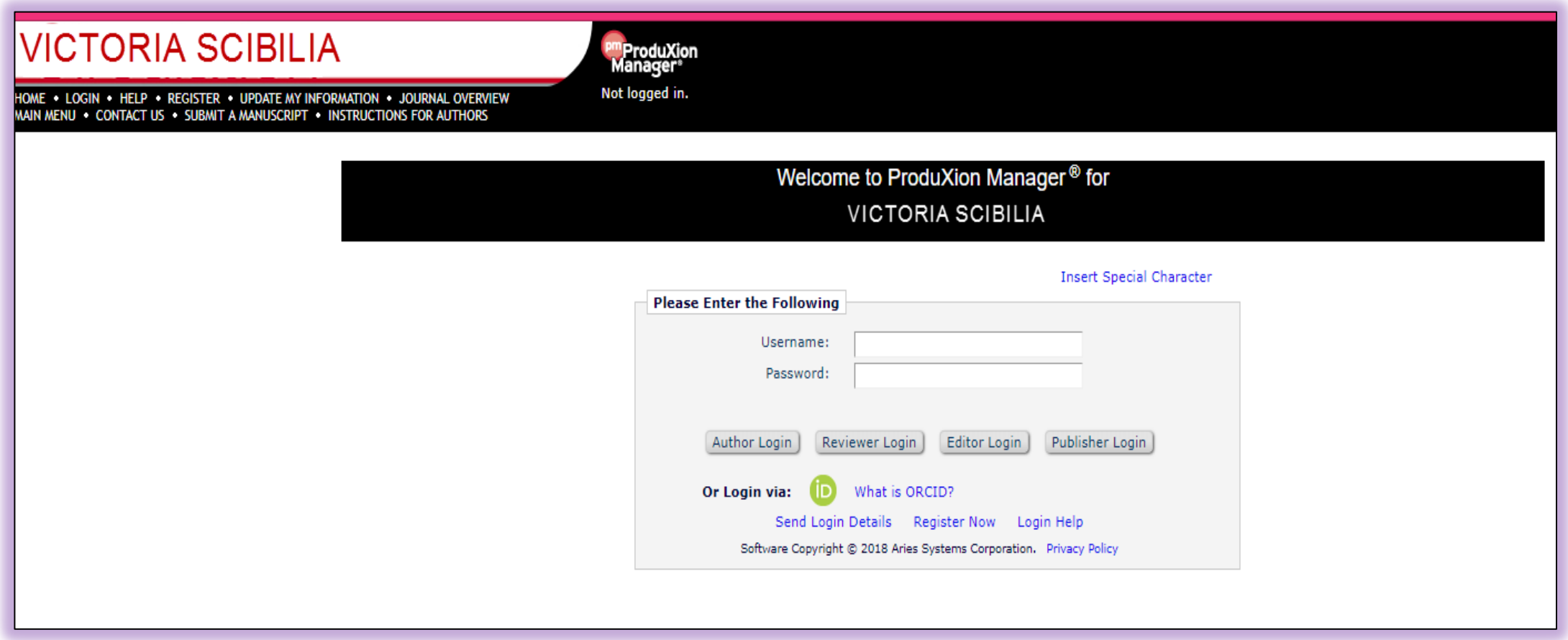
What is ProduXion Manager?

- Companion product to Editorial Manager
- Offers a set of features that allow publications to manage activity outside of the peer-review workflow
- Production Tasks are used to track and manage assignments to outside vendors or freelancers

Getting Started with **ProduXion Manager**

Main Page Overview

Main Page Overview



Role Families

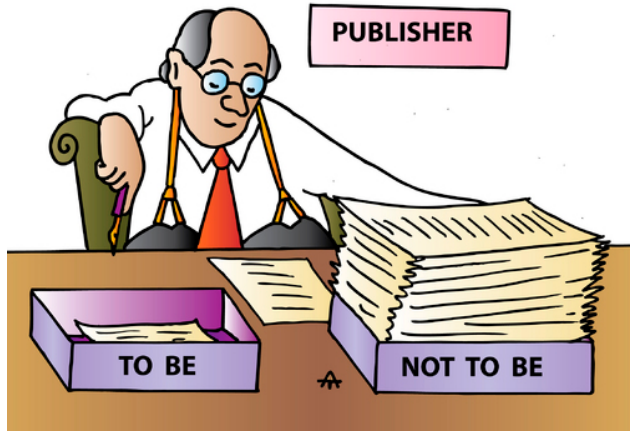
Role Families

Author Login

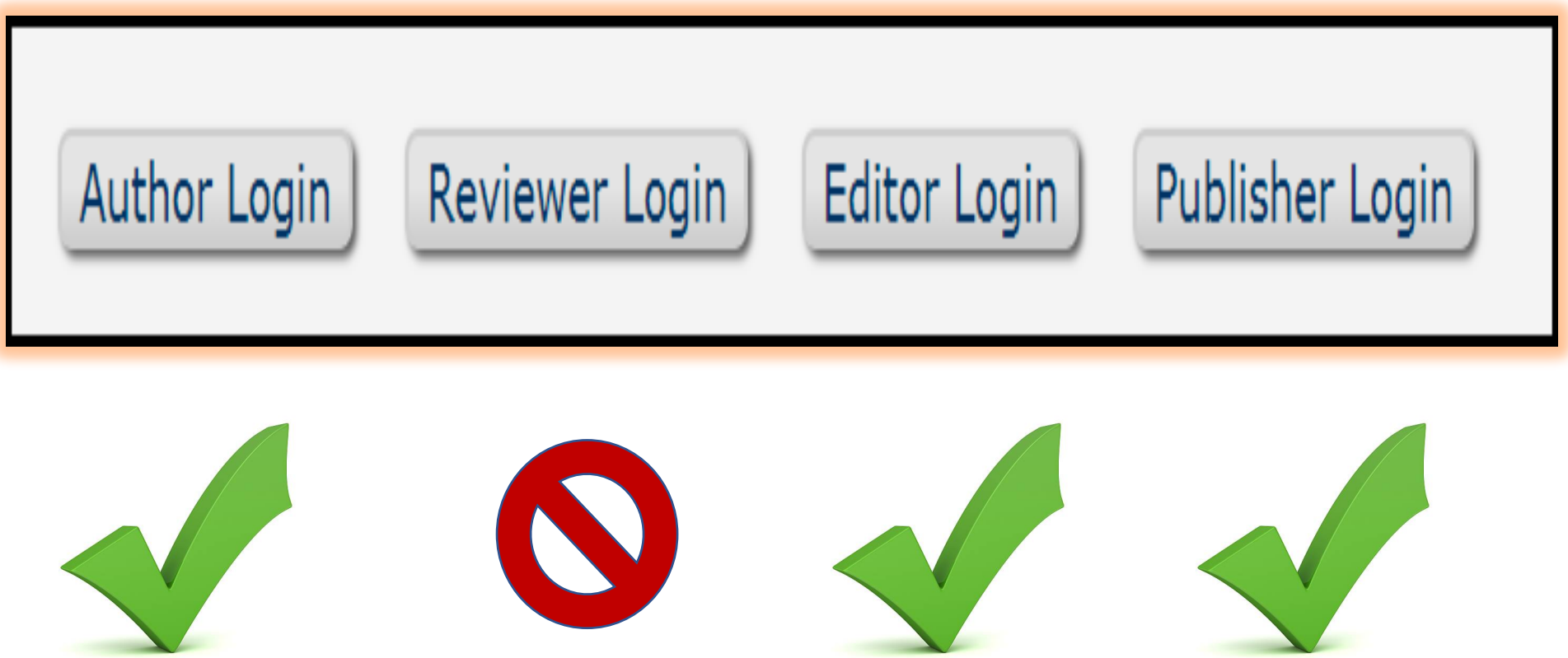
Editor Login

Reviewer Login

Publisher Login



Role Families

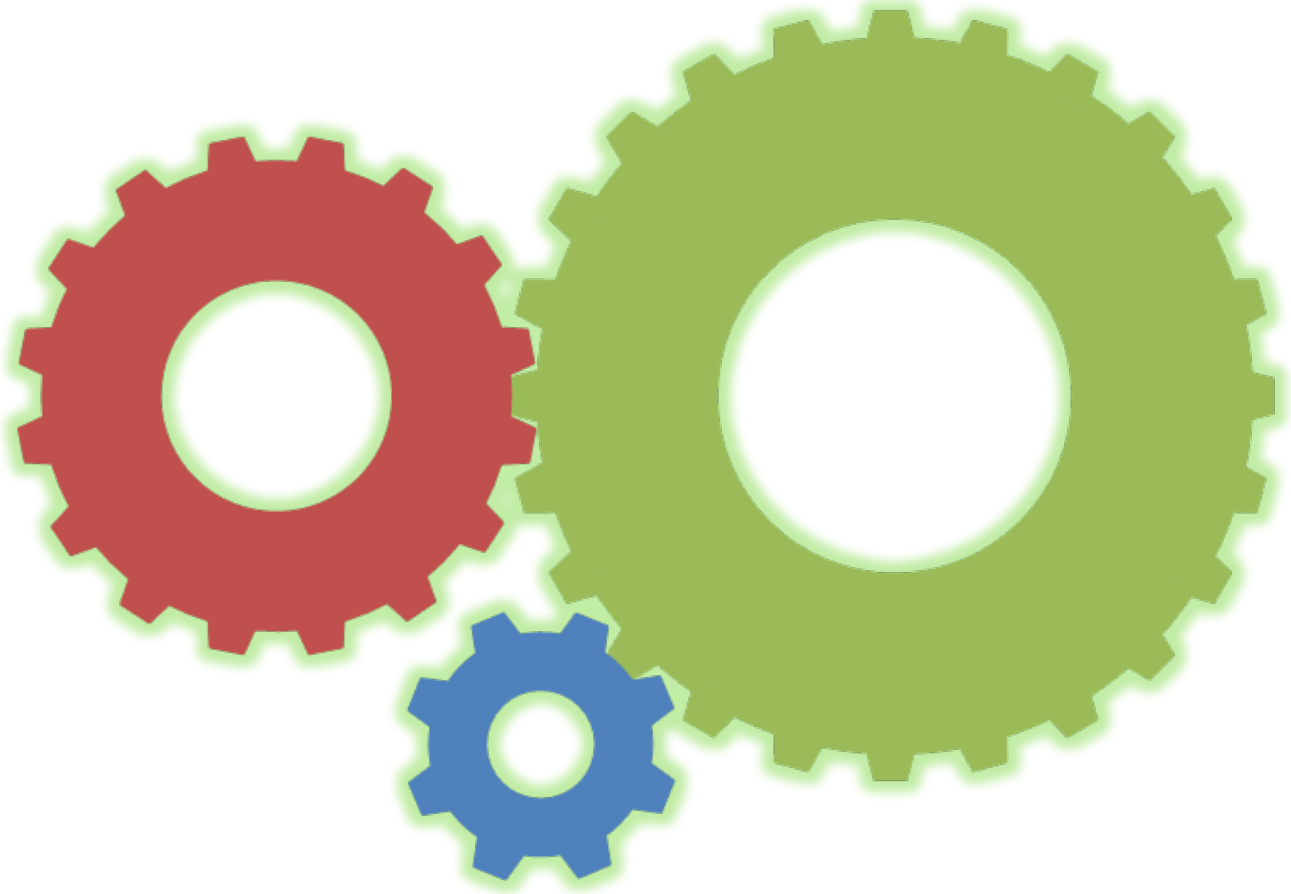


Role Families

- Editor Roles: Can have as much access to the Production environment as the publication needs
  - Used for internal staff – Production Editors

- Publisher Roles: Less access to peer-review functionality
  - Used for third-party suppliers – External freelancers or vendors

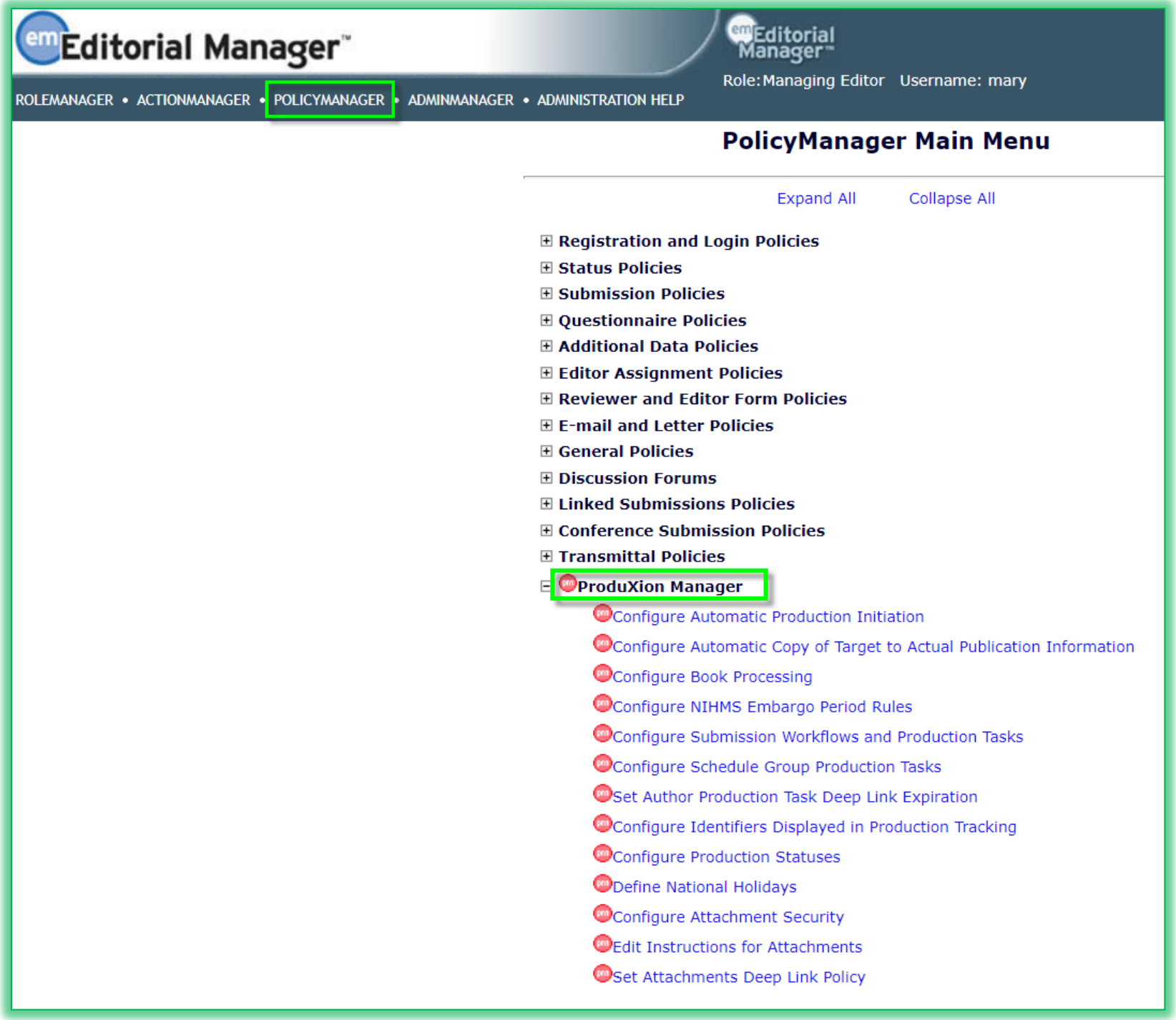
Configurations



Policy Manager

Role Manager

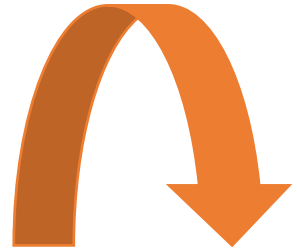
Aries systems



Configurations

ProduXion Manager configurations are added to Policy Manager

Configurations



ProduXion Manager configurations are added to Role Manager for Authors, Editors, & Publishers

Author Login

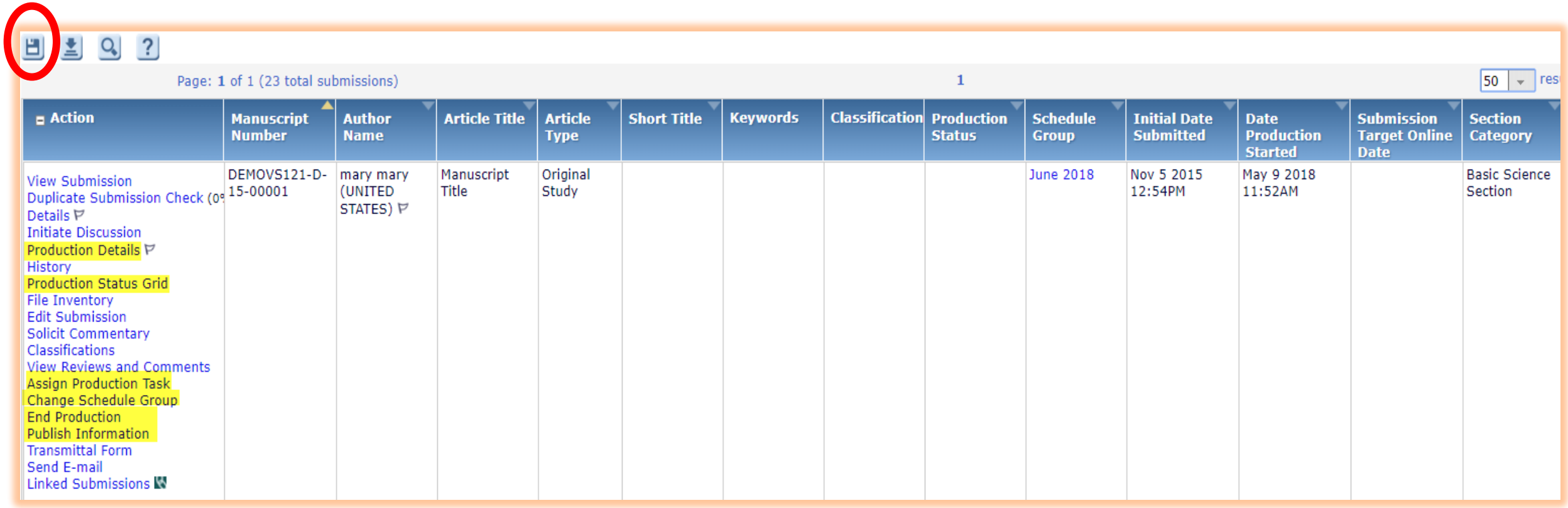
Editor Login

Publisher Login

- 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
  - View Schedule Groups
  - Manage Schedule Groups
    - Assign Submissions to Multiple Schedule Groups
    - Copy Contents when Copying a Group
    - Automatically Cancel Production Task Assignments when Closing Schedule Groups
  - Edit Submission Target Online Publication Date
  - View Production Details
    - Use Production Details Layout: Default Production
  - View Production Status Grid
  - View At-Risk Submissions
  - View All Submissions in Production
  - End Production/Return to Production
  - Assign Submission Production Task
  - Assign Schedule Group Production Task
  - Cancel Production Task Assignment
  - Override Submission Production Task Due Date
  - Override Schedule Group Production Task Due Date
  - Receive Production Task
  - Create Automated Submission Tasks Reminders
  - Create Automated Schedule Group Tasks Reminders
  - Send Production Reminders
  - Run Production Task Assignment Totals Report
  - Download Attachments
  - Upload Attachments

Searching Submissions in ProduXion Manager

Searching Submissions in PM



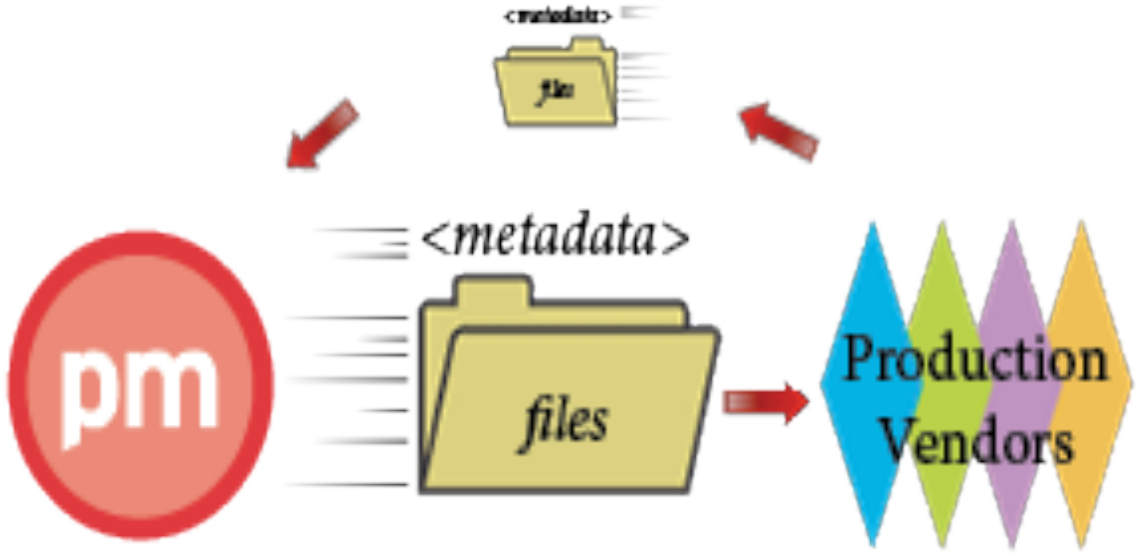
Page: 1 of 1 (23 total submissions) 1 50 res

Action	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Keywords	Classification	Production Status	Schedule Group	Initial Date Submitted	Date Production Started	Submission Target Online Date	Section Category
View Submission Duplicate Submission Check (0 Details Initiate Discussion Production Details History Production Status Grid File Inventory Edit Submission Solicit Commentary Classifications View Reviews and Comments Assign Production Task Change Schedule Group End Production Publish Information Transmittal Form Send E-mail Linked Submissions	DEMOVS121-D-15-00001	mary mary (UNITED STATES)	Manuscript Title	Original Study					June 2018	Nov 5 2015 12:54PM	May 9 2018 11:52AM		Basic Science Section

How Do I Get a Submission Into ProduXion Manager?

ProduXion Manager®

Getting submissions into ProduXion Manager…

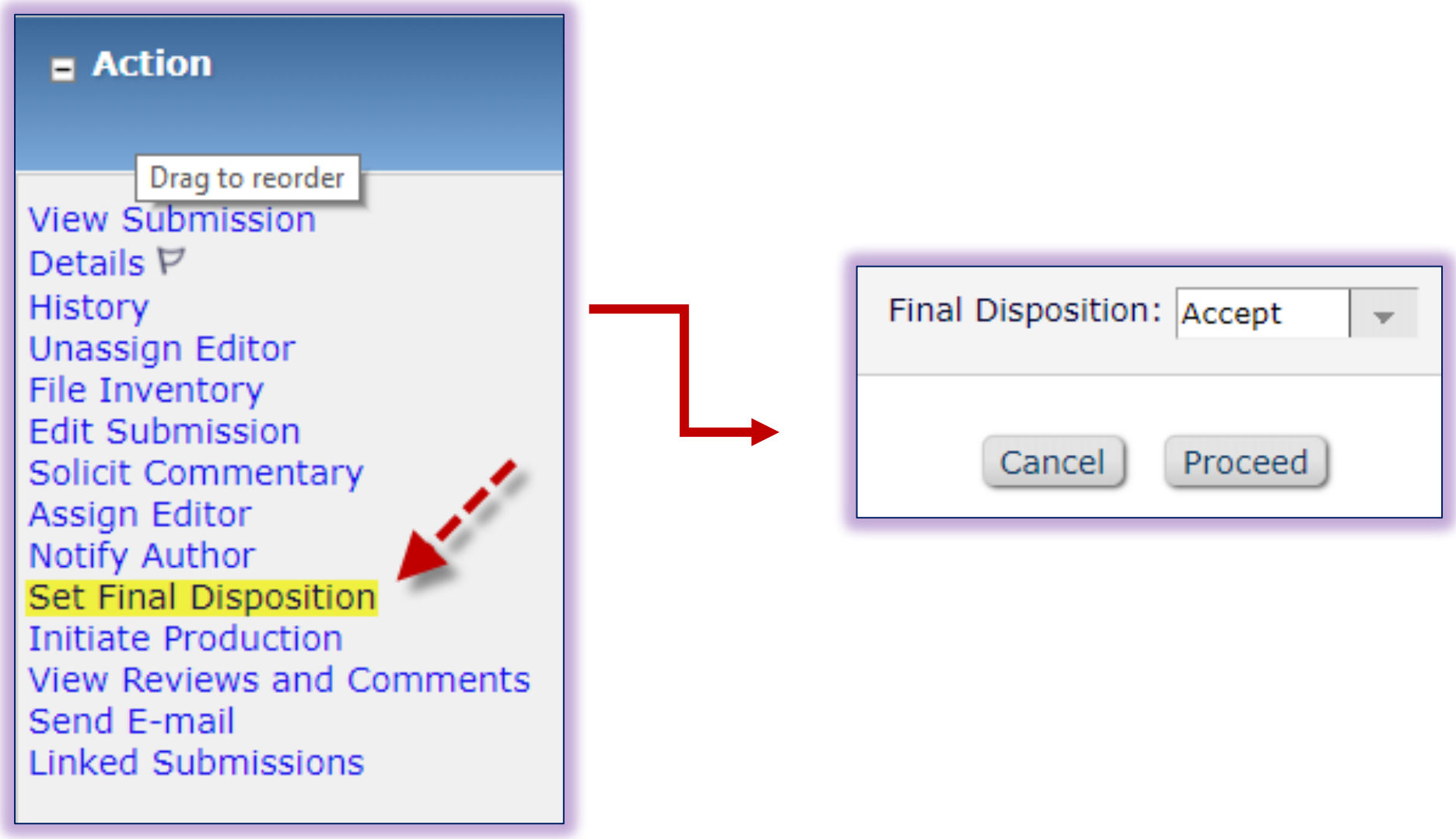


- Final Disposition – Accept
- New Submissions – Initiate Production link
- Create Submission Interface
- Imports

Final Disposition - Accept

Final Disposition - Accept

All Submissions with Editor's Decision



Final Disposition - Accept

Source Files

Item Type	Item Description	File Name	Last Modified	Actions	Include Item in Publisher Zip File
PDF	PDF			View	✔
Manuscript		Test Manuscript.doc	Jul 11 2016 3:53PM	Download Item Item Metadata	☑
Figure		flower.jpg	Jun 5 2018 5:14PM	Download Item Item Metadata	☑
Figure		flower2.jpg	Jun 5 2018 5:14PM	Download Item Item Metadata	☑

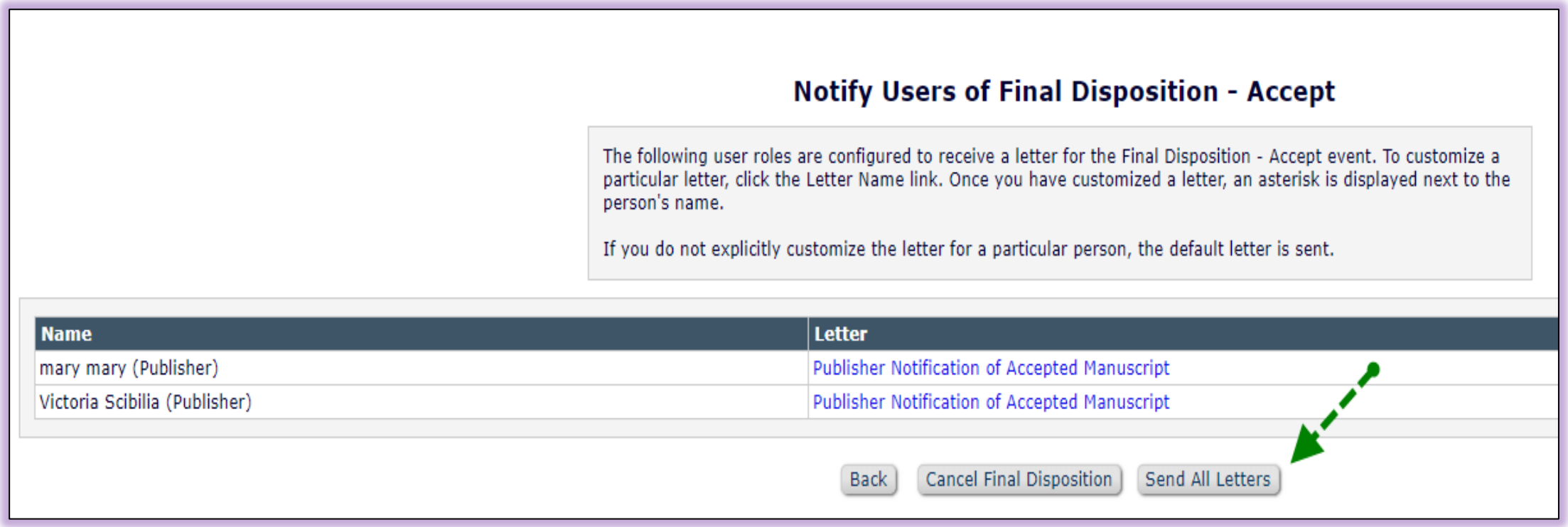
Final Disposition - Accept

Submission Metadata

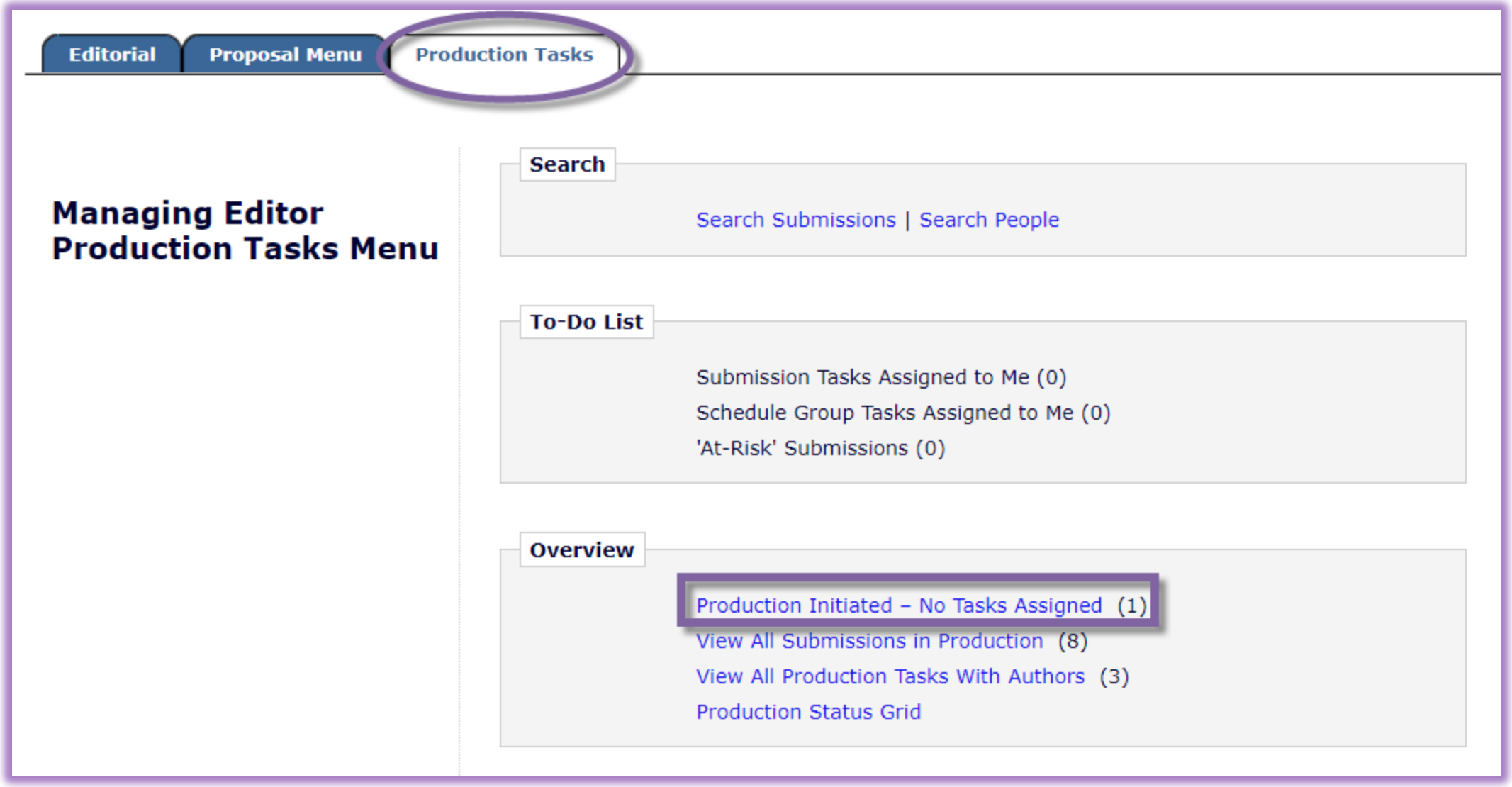
☑ Include metadata in release to production

Item Description	Value	
Manuscript Number	DEMOVS141-D-18-00001	Help
Revision Number	0	Help
Article Title	Taming Temptation: Visual Perspective Impacts Consumption andWillingness to Pay For Unhealthy Foods	Help
Article Type	Original Study	Help
Initial Date Submitted	Oct 3 2017 11:36AM	Help
Date Revision Submitted		Help
Keyword		Help
Classification Description		Help
Section/Category Name		Help
All Authors	mary mary; Brittany M. Christian; Lynden K. Miles; Sophie T. Kenyeri; Jennifer Mattschey; Victoria Scibilia	Help
First Author First Name	mary	Help
First Author Middle Name		Help
First Author Last Name	mary	Help
First Author Degree		Help
Number of Color Figures		Help
Number of Line Drawings		Help
Number of Half Tone Figures		Help
Number of Tables		Help
DOI		Help
Table of Contents Position		Help
Page Range		Help
Publication Volume Number		Help
Publication Issue Number		Help
CORRESPONDING AUTHOR INFORMATION		Help
Title	Dr.	Help
First Name	mary	Help
Middle Name		Help
Last Name	mary	Help
Degree		Help
Primary Phone Number	978-975-7570	Help

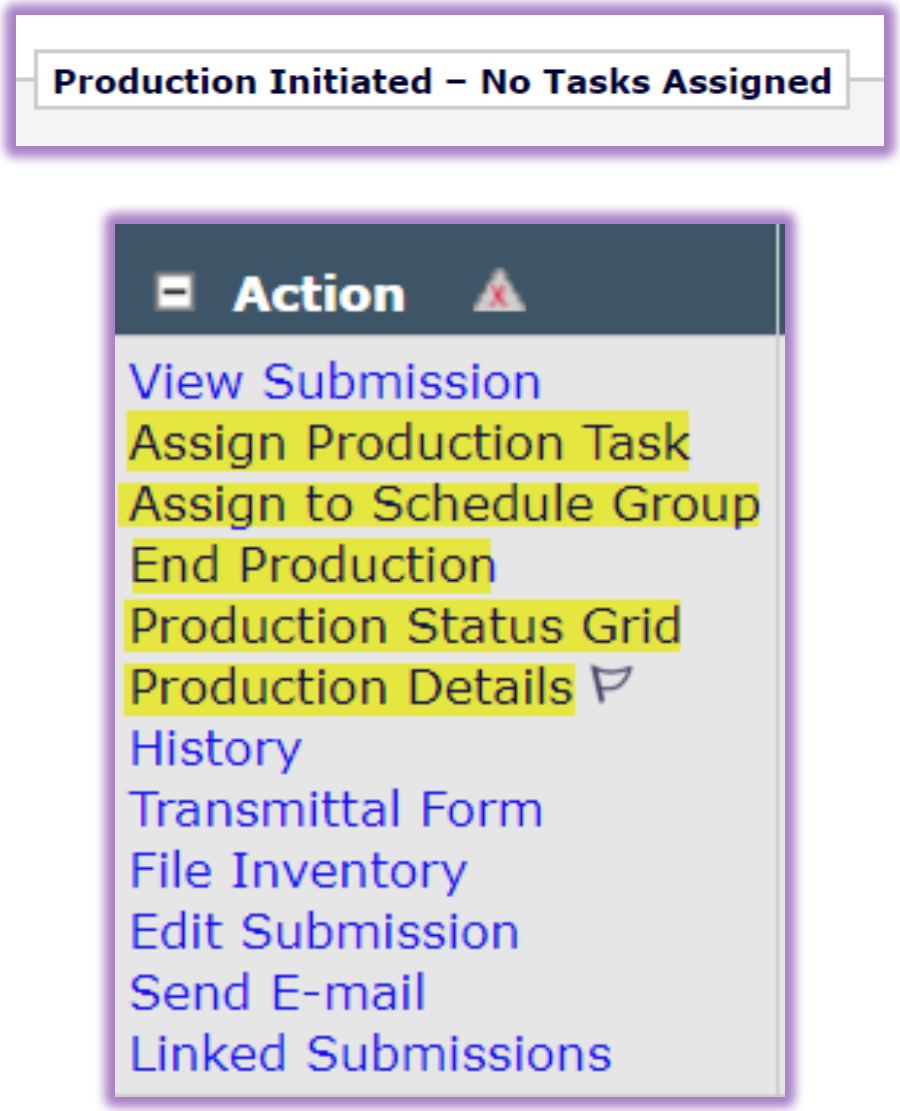
Final Disposition - Accept



Final Disposition - Accept



Final Disposition - Accept



New Action Links are available in ProduXion Manager:

- Assign Production Task
- Assign to Schedule Group
- End Production
- Production Status Grid
- Production Details

Final Disposition - Accept

Policy Manager

Configure Automatic Production Initiation

Set/Check the 'Initiate Production upon Setting Final Disposition' box to have EM automatically initiate production when the final disposition on a submission is set to 'Accept'.

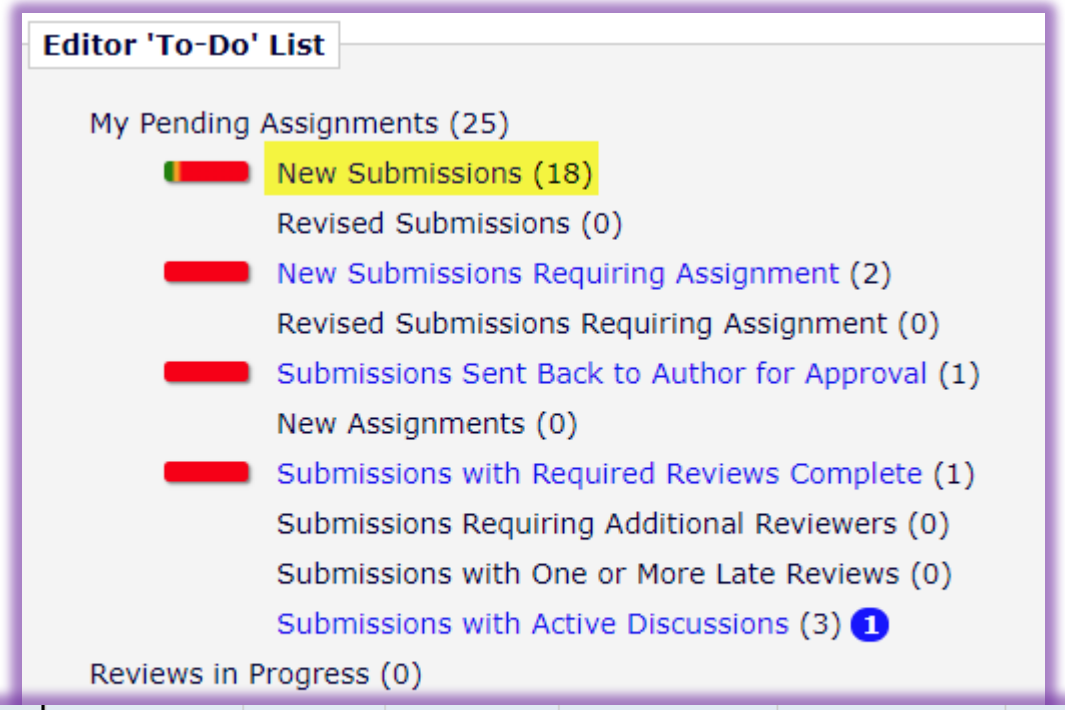
You may also give Editor and Publisher Roles the 'Initiate Production' permission to allow them to do this manually at any stage before this point. Users with this permission will also be given additional options for assigning the submission to a Schedule Group and/or assigning an initial production task when production is initiated automatically as a result of setting the final disposition.

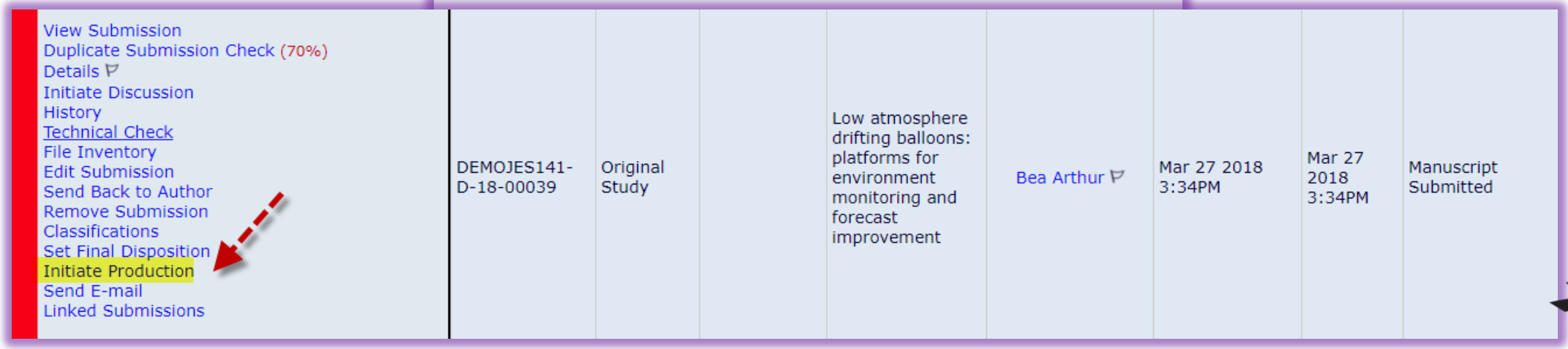
For Conference Submissions, note that only the 'Accept and Transmit' Final Disposition will automatically initiate production; 'Accept for Extraction' sets the final disposition.

Regular Submissions:	☑ Initiate Production upon Setting Final Disposition to 'Accept' ☐ Initiate Production upon Setting Final Disposition to 'Accept on Submission'
Conference Submissions:	☐ Initiate Production upon Setting Final Disposition to 'Accept and Transmit'

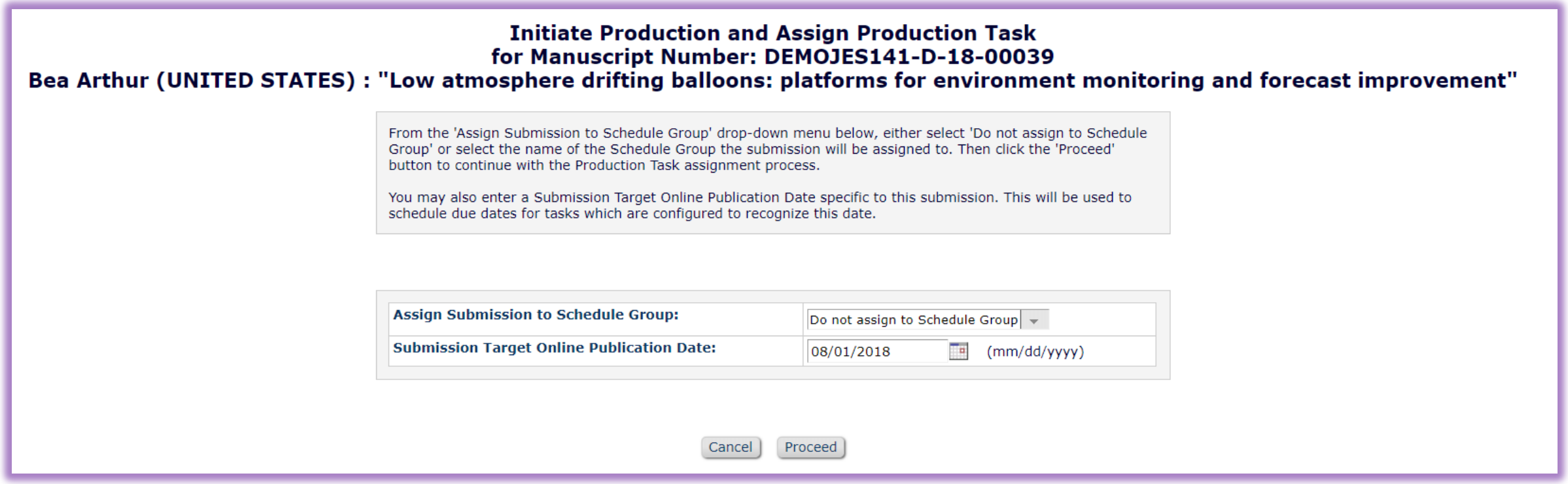
New Submissions – Initiate Production

New Submissions – Initiate Production





New Submissions – Initiate Production



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

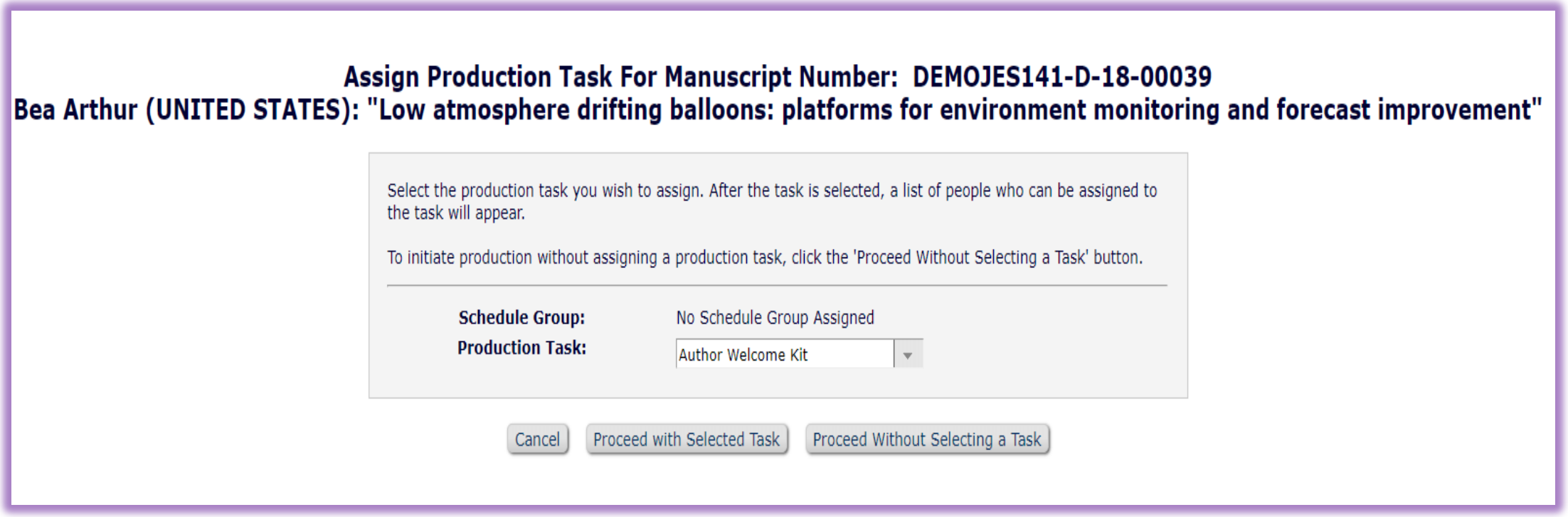
From the 'Assign Submission to Schedule Group' drop-down menu below, either select 'Do not assign to Schedule Group' or select the name of the Schedule Group the submission will be assigned to. Then click the 'Proceed' button to continue with the Production Task assignment process.

You may also enter a Submission Target Online Publication Date specific to this submission. This will be used to schedule due dates for tasks which are configured to recognize this date.

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

Cancel Proceed

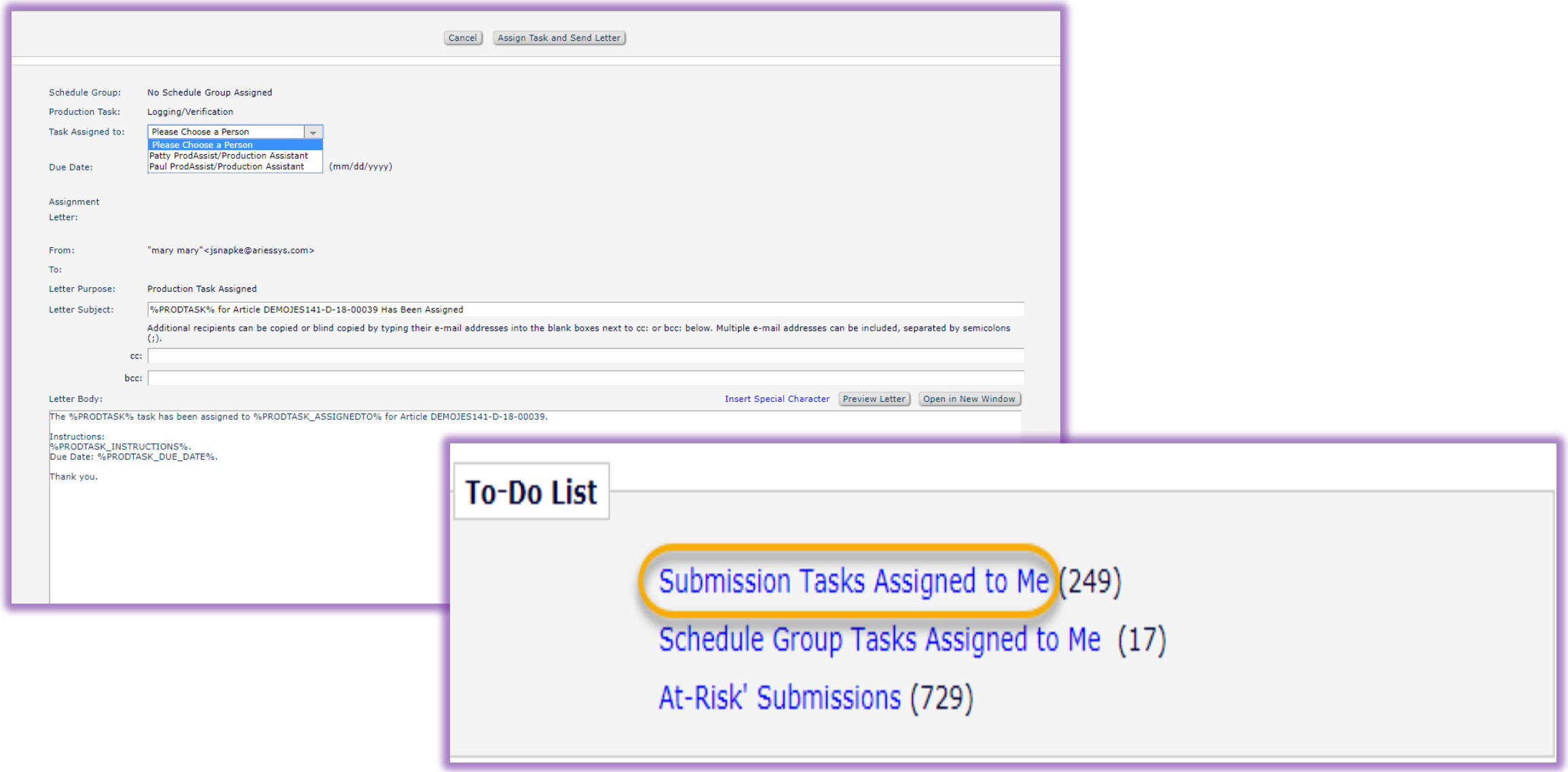
New Submissions – Initiate Production



You can choose to:

1. Proceed With Assigning a Task
2. Proceed Without Assigning a Task

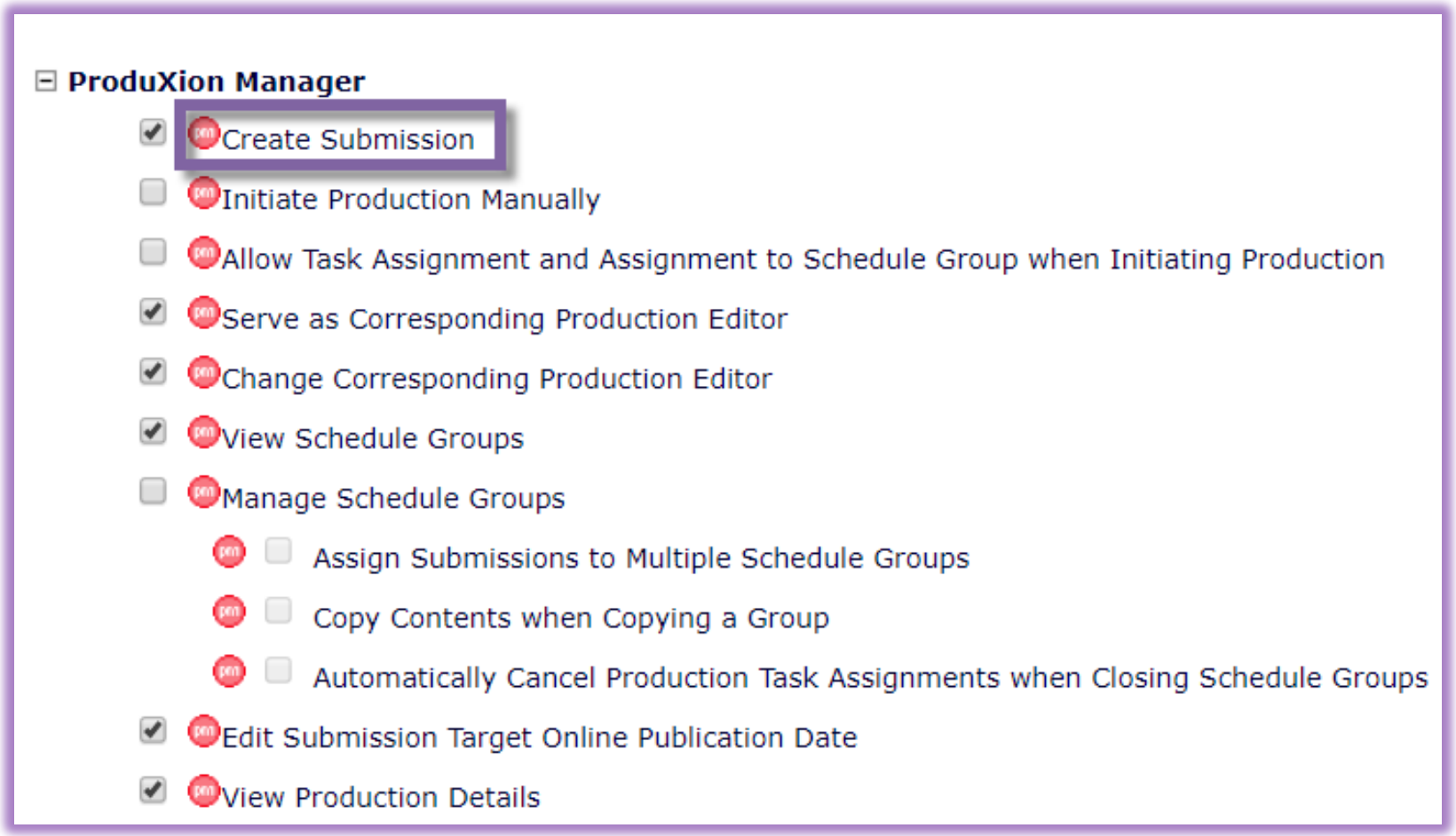
New Submissions – Initiate Production



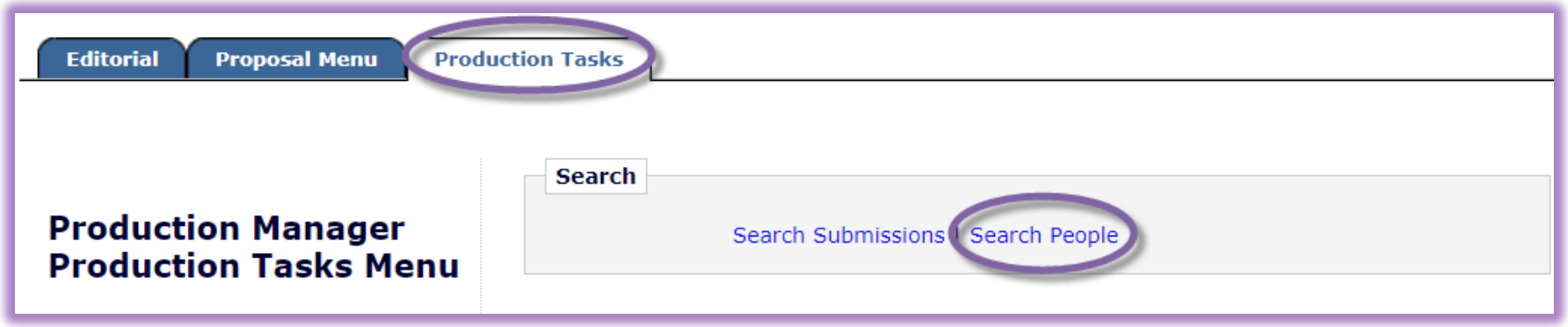
Create Submission Interface

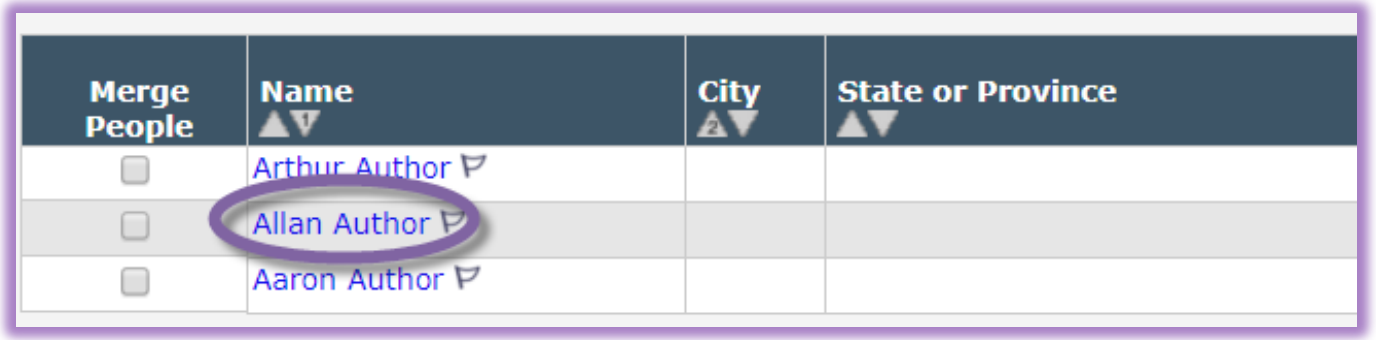
Create Submission Interface

Role Manager

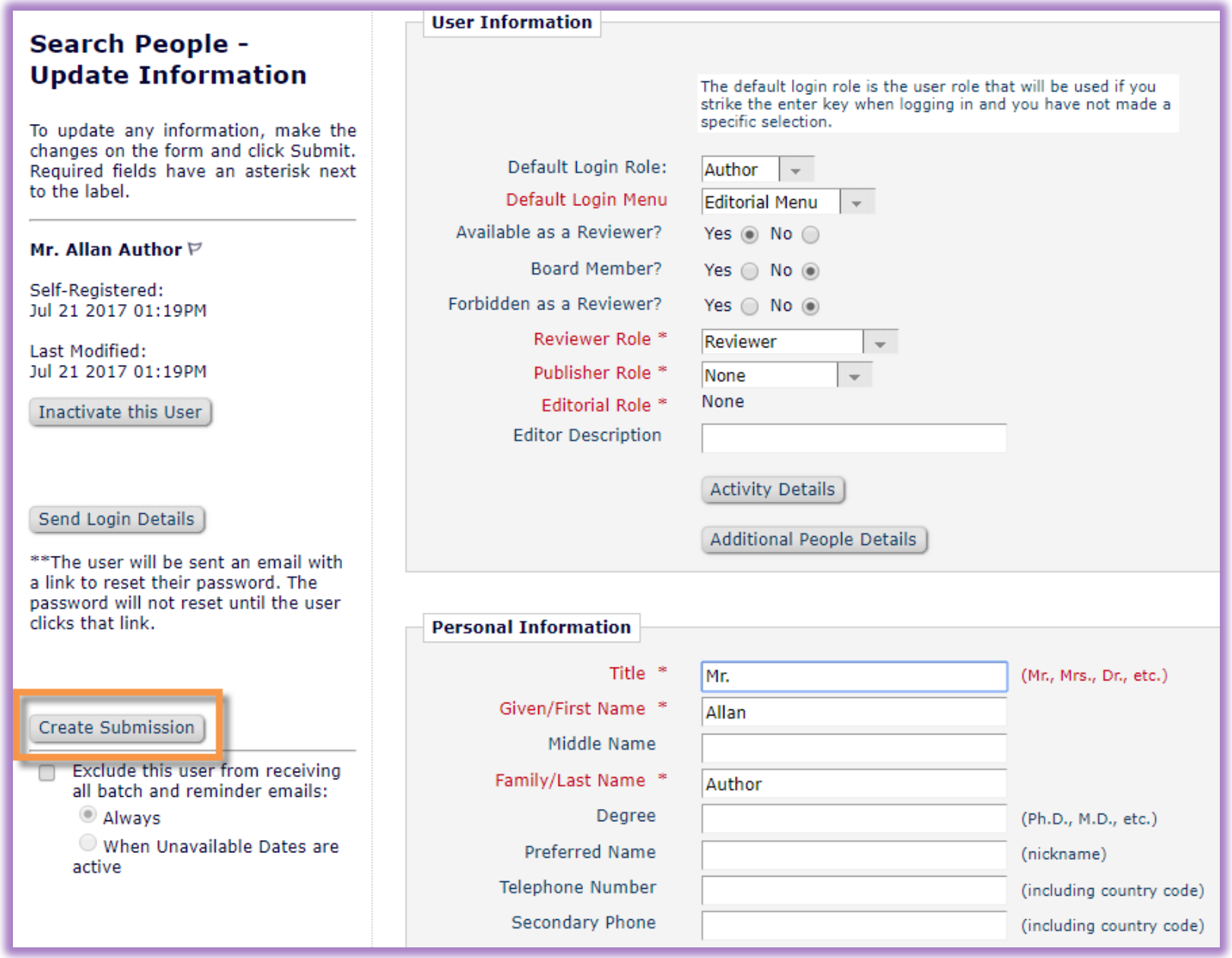


Create Submission Interface



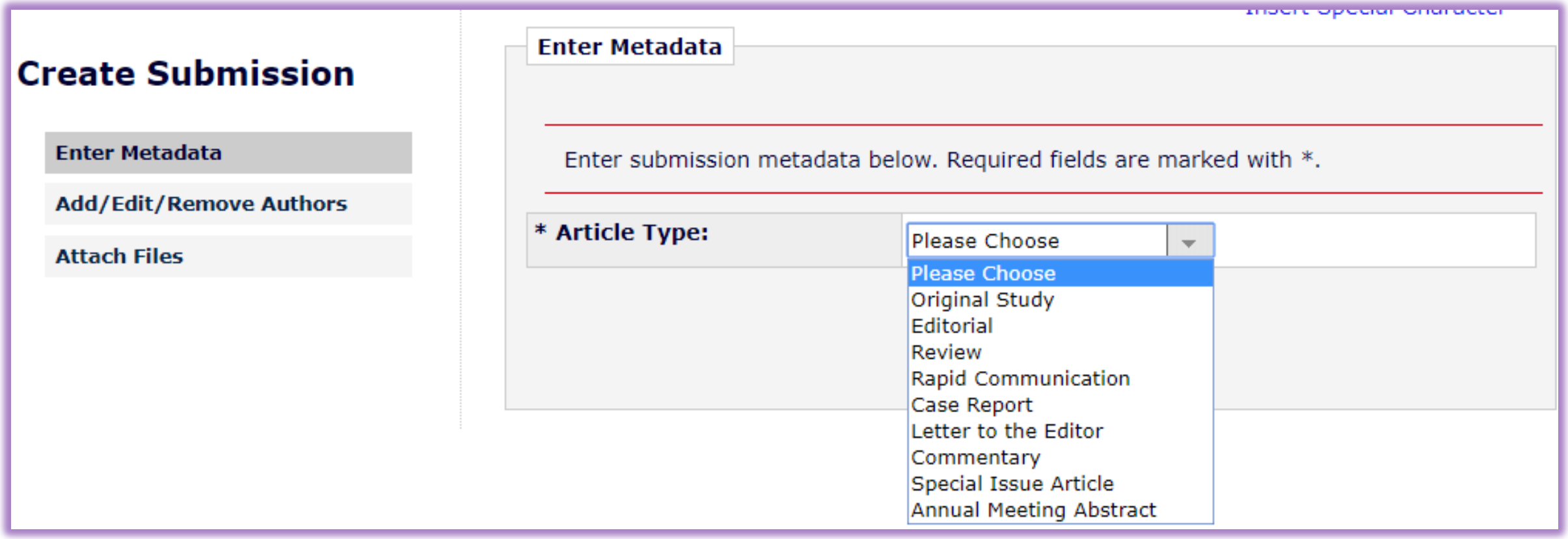


Create Submission Interface



- Create Submission is found in a user's profile record
- Role Manager permissions allow an Editor to see this option

Create Submission Interface



Enter Metadata

Enter submission metadata below. Required fields are marked with *.

* **Article Type:**	Original Study
* **Title:**	ProduXion Manager Bootcamp 2018
Secondary Full Title:	
Short Title:	
Section:	Please Choose
Manuscript Number:	Check to have number auto-assigned
Revision Number:	0 *Select 0 if no revisions, or a number corresponding to the revision number*
DOI:	
Initial Date Submitted:	06/06/2018 (mm/dd/yyyy)
Date Revision Submitted:	(mm/dd/yyyy) Enter the date a first revision or higher was received.
Final Decision Date:	06/06/2018 (mm/dd/yyyy)
Date Final Disposition Set:	(mm/dd/yyyy)
Final Disposition Term:	Completed Accept
Submission Target Online Publication Date:	(mm/dd/yyyy)

Classifications:	Select Manuscript Classifications

Abstract:

ProduXion Manager® users are publishers, freelancers, composition vendors and authors. On manuscript acceptance, files and metadata are automatically transferred to ProduXion Manager for workflow processing.

Author Comments:

Comments from the Author

Please confirm you have approval from all Co-authors to submit this manuscript?

Please select a response

If you have submitted this manuscript to another publication please give details below

Character Count: 0

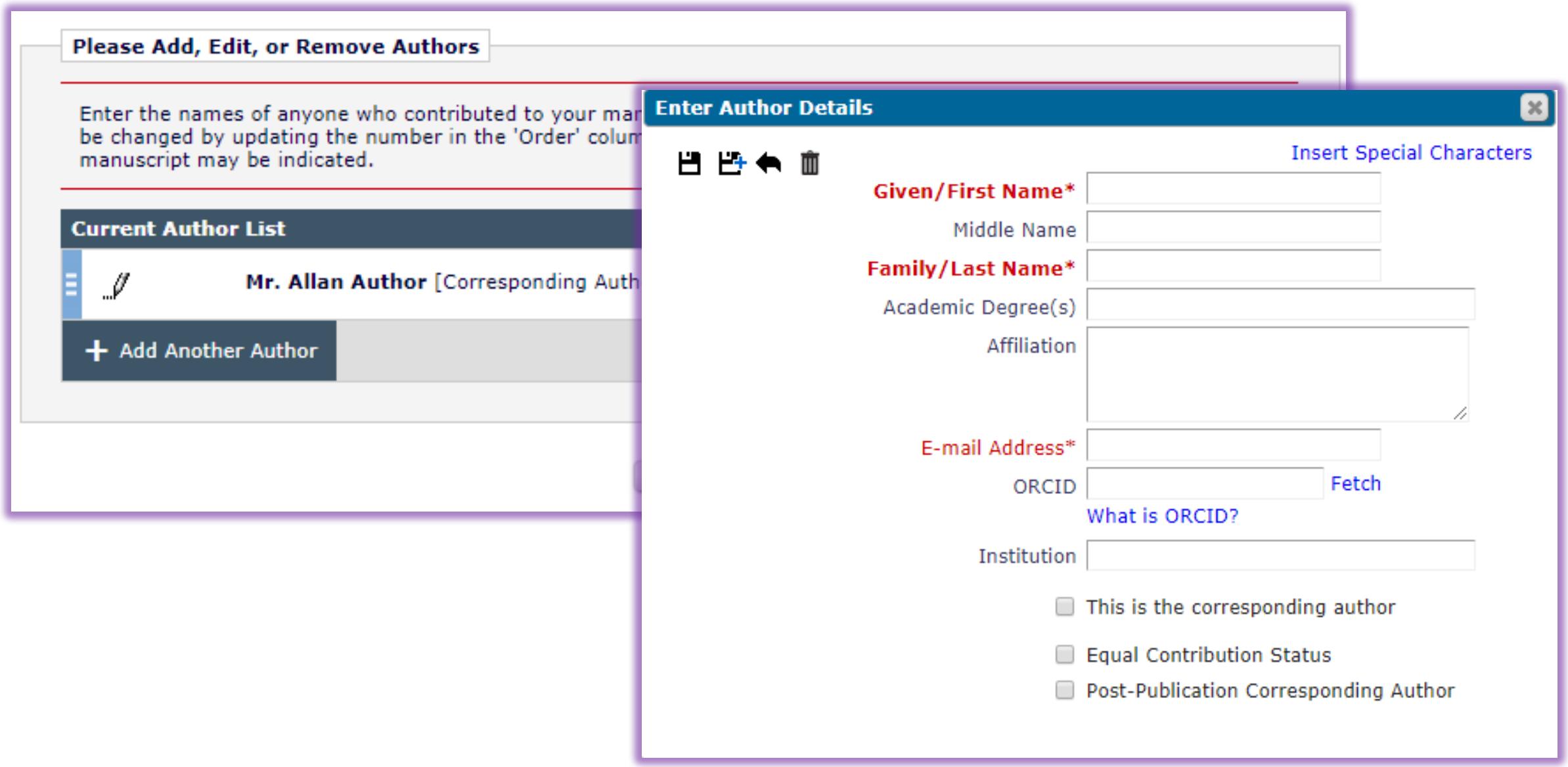
Limit 20000 characters

Please enter the **Word Count** of your manuscript

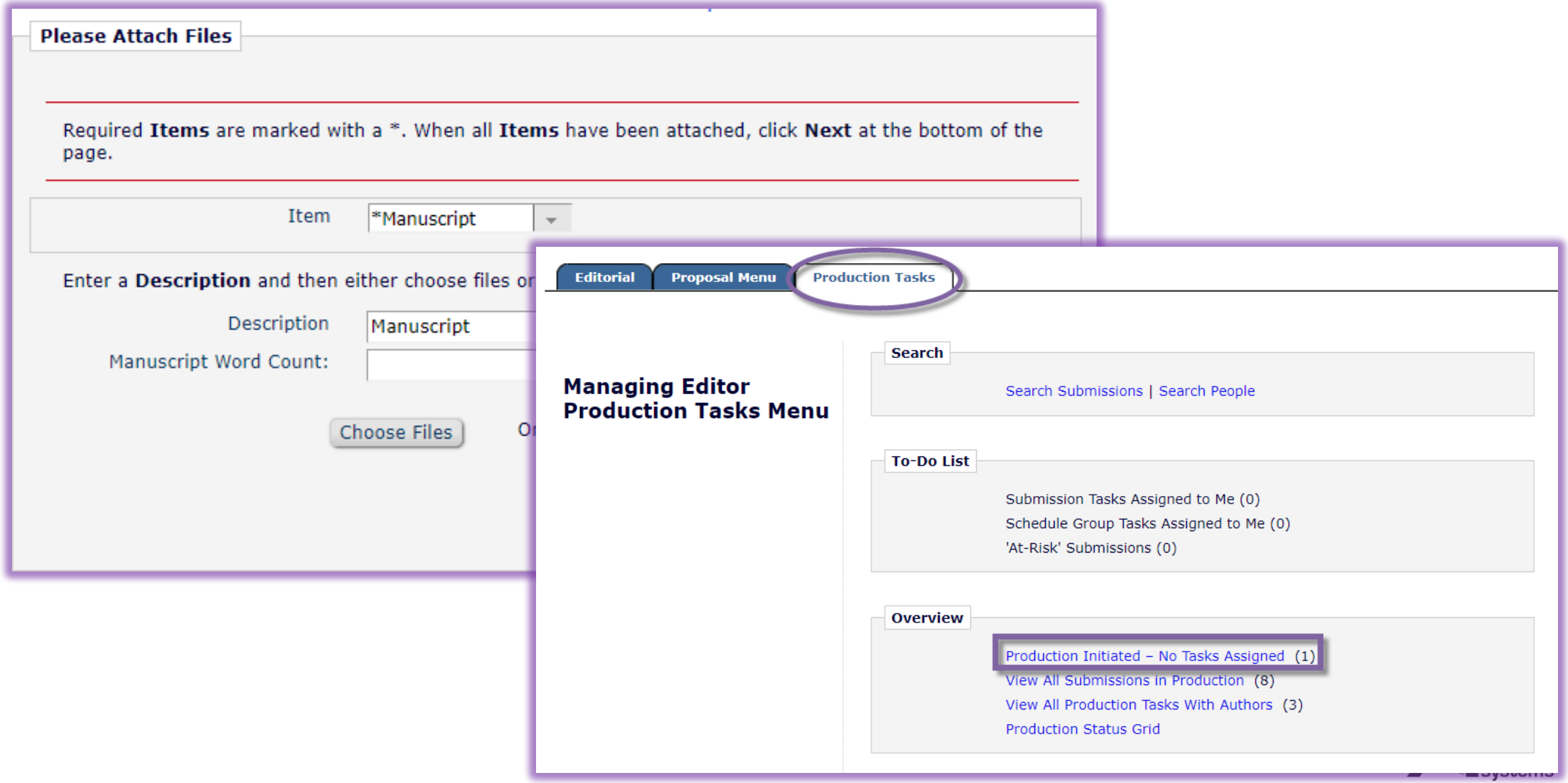
Region of Origin:	UNITED STATES
Target Number of Pages:	0
Black and White Image Count:	0
Color Image Count:	0

Save Changes | Save and Proceed

Create Submission Interface



Create Submission Interface

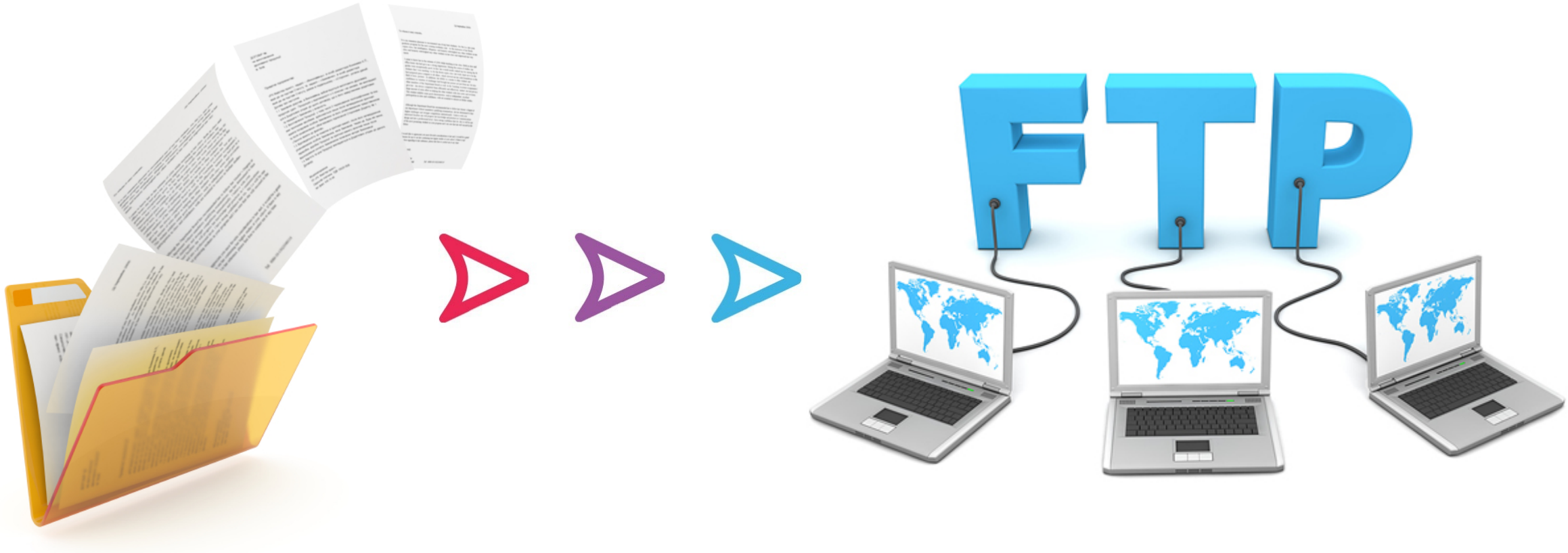


Imports

Imports

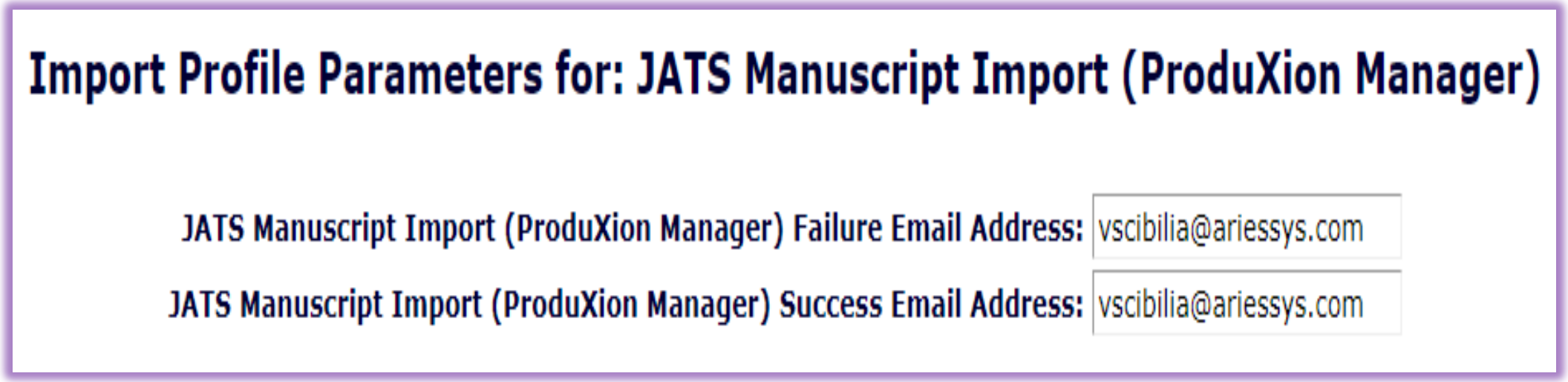
- ProduXion Manager accepts submissions from other peer-review sites, such as Scholar One or EJP

Imports



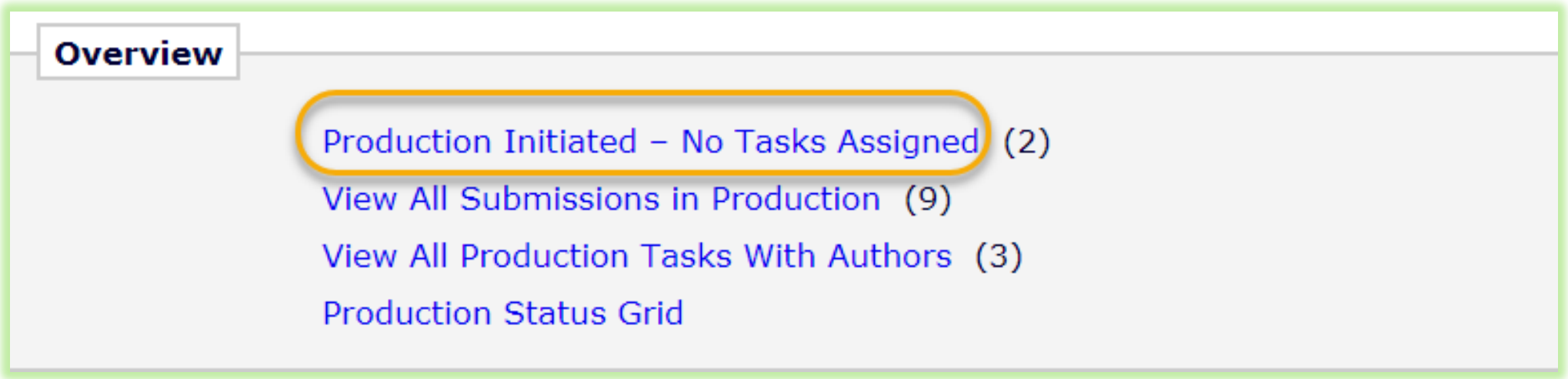
Submission drops into the Production Initiated – No Tasks Assigned folder

Imports



**An email address can be added for notification of successful and failed imports

Production Initiated – No Tasks Assigned folder



Production Initiated – No Tasks Assigned

Action	Manuscript Number	Author Name	Article Title	Production Status	Schedule Group	Section/ Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
View Submission Assign Production Task Change Schedule Group End Production Production Status Grid Production Details History Transmittal Form File Inventory Edit Submission Send E-mail Linked Submissions	DEMOJES141-D-18-00037	Allan Author (UNITED STATES)	Vol. 56, Iss. 6, Art. 2		v56n6		Original Study	Mar 22 2018 9:48AM	Mar 22 2018 10:42AM	

Production Details

Full Title:	ProduXion Manager Bootcamp 2018
Short Title:	
Corresponding Author:	Allan Author UNITED STATES [Proxy]
Corresponding Author E-Mail:	aauthor@ariestrash.com

Author Comments:

Insert Special Character

Comments from the Author

Article Type:	Original Study
Section/Category:	
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Technical Check:	
Requested Editor:	
Editorial Status Date:	Jun 06 2018 04:01PM
Current Editorial Status:	Completed Accept
Production Status:	In Production
Corresponding Production Editor:	None
Submission Target Online Publication Date:	(mm/dd/yyyy)
Schedule Group Target Online Publication Date:	
Target Number of Pages:	0

Top

Production Details

Transmittal Form:	Link to Transmittal Form
Discussion Forum:	Initiate Discussion
Submission Flags:	
Select Submissions Flags:	Add/Edit Submission Flags Top
Final Disposition Term:	Accepted

Abstract: Top

ProduXion Manager® users are publishers, freelancers, composition vendors and authors. On manuscript acceptance, files and metadata are automatically transferred to ProduXion Manager for workflow processing.

Manuscript Notes: Top

Display Manuscript Notes Flag Insert Special Character

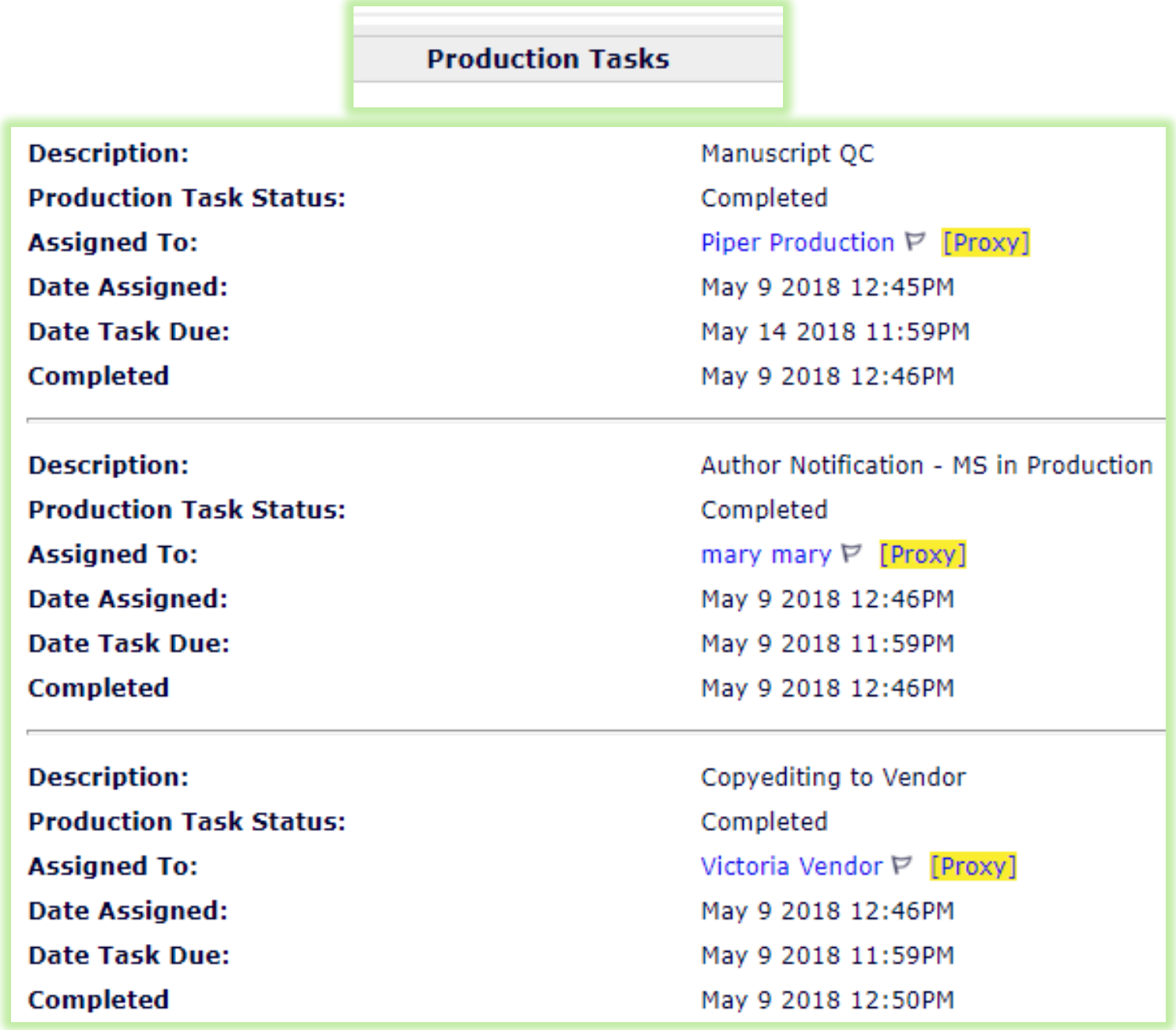
Additional Information

Questionnaire Responses

Production Tasks Top

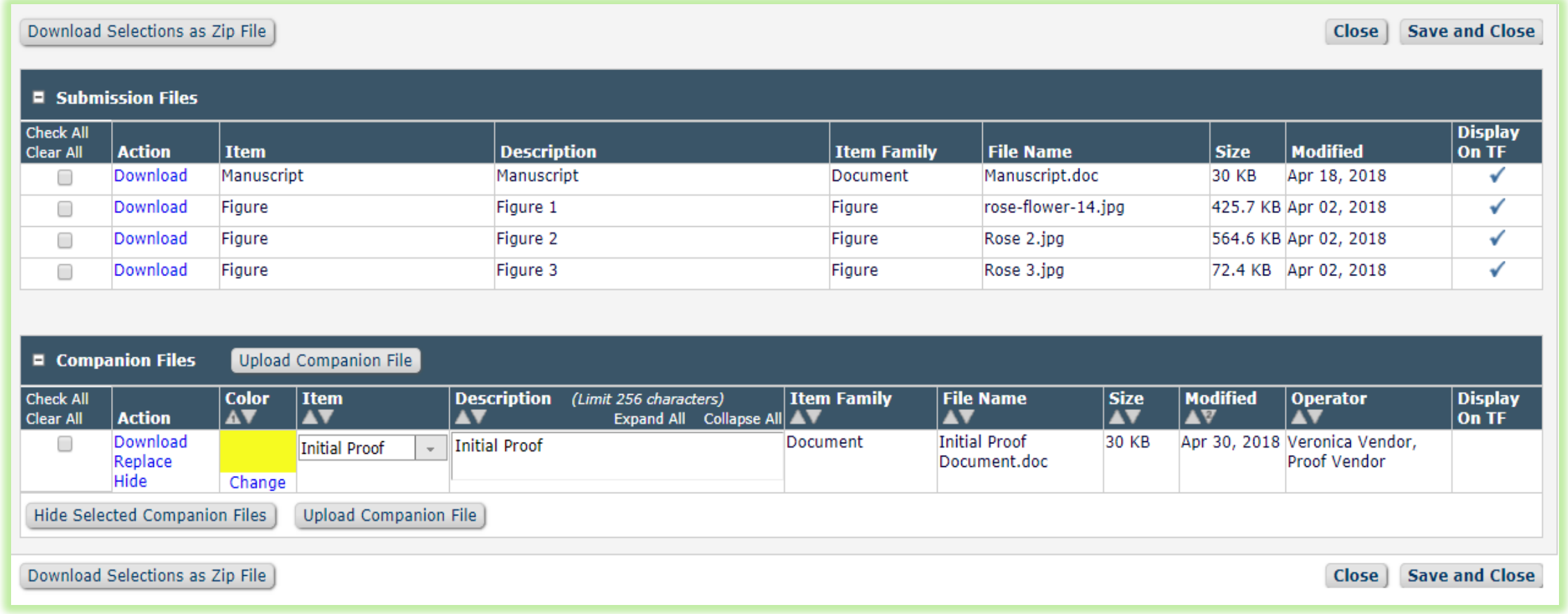
Duplicate Submission Check:	

Cancel Save Save and Close



- Production Tasks begin to populate on the Production Details page as the workflow proceeds.

File Inventory



Download Selections as Zip File | Close | Save and Close

Submission Files

Check All / Clear All	Action	Item	Description	Item Family	File Name	Size	Modified	Display On TF
☐	Download	Manuscript	Manuscript	Document	Manuscript.doc	30 KB	Apr 18, 2018	✓
☐	Download	Figure	Figure 1	Figure	rose-flower-14.jpg	425.7 KB	Apr 02, 2018	✓
☐	Download	Figure	Figure 2	Figure	Rose 2.jpg	564.6 KB	Apr 02, 2018	✓
☐	Download	Figure	Figure 3	Figure	Rose 3.jpg	72.4 KB	Apr 02, 2018	✓

Companion Files Upload Companion File

Check All / Clear All	Action	Color	Item	Description *(Limit 256 characters)* Expand All Collapse All	Item Family	File Name	Size	Modified	Operator	Display On TF
☐	Download Replace Hide	Change	Initial Proof	Initial Proof	Document	Initial Proof Document.doc	30 KB	Apr 30, 2018	Veronica Vendor, Proof Vendor	

Hide Selected Companion Files | Upload Companion File

Download Selections as Zip File | Close | Save and Close

Assigning a Production Task

- [x] View Production Status Grid
- [x] View At-Risk Submissions
- [x] View All Submissions in Production
- [x] End Production/Return to Production
- [x] Assign Submission Production Task
- [x] Assign Schedule Group Production Task
- [x] Cancel Production Task Assignment
- [x] Override Submission Production Task Due Date
- [x] Override Schedule Group Production Task Due Date
- [x] Receive Production Task
- [x] Create Automated Submission Tasks Reminders
- [x] Create Automated Schedule Group Tasks Reminders
- [x] Send Production Reminders
- [x] Run Production Task Assignment Totals Report
- [x] Download Attachments
- [x] Upload Attachments

=

Action

- Assign Production Task
- Change Schedule Group
- Production Status Grid
- Production Details
- History
- Transmittal Form
- File Inventory
- Send E-mail

Assigning Production Tasks

Assigning Production Tasks

Production Tasks allow you to do the following:

- Assign a submission to a person for processing
- Set due dates for each task within the workflow
- Control who can carry out each task
- Choose which files are automatically sent as part of the assignment
- Recipients can upload new files
- Dates are automatically recorded for each task/activity

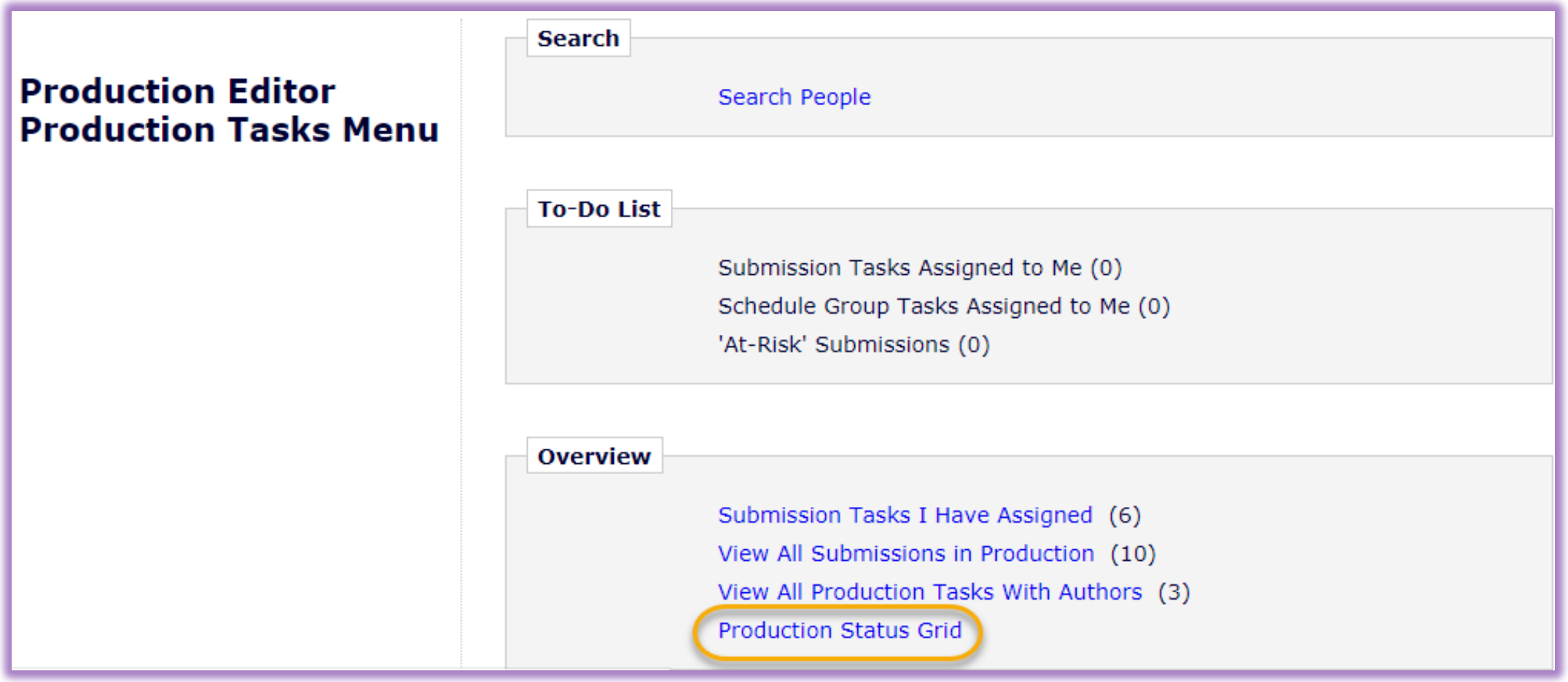
How do I assign a production task?

Assign Production Task Assign to Schedule Group End Production Production Status Grid Production Details History Transmittal Form File Inventory Edit Submission Send E-mail Linked Submissions		Allan Author (UNITED STATES)	ProduXion Manager Bootcamp 2018	NA			Original Study	Jun 06 2018 04:01PM	Jun 06 2018 04:01PM

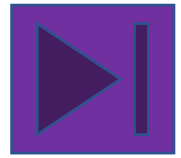
Assigning Production Tasks

I know how to assign a production task!

Production Status Grid

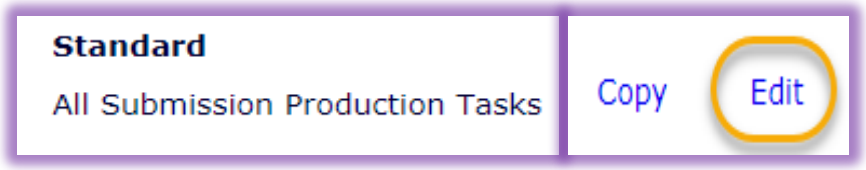


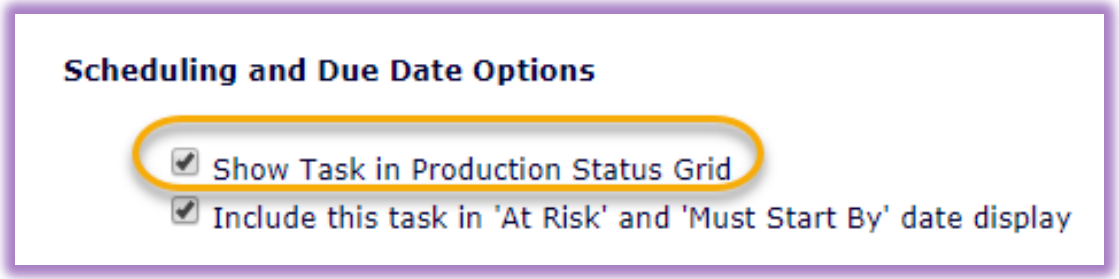
Production Status Grid



Production Status	Date Production Started	Submission Target Online Date	Initial Intake	Conversion	Copyediting	Author Notification of Proof	Initial Proof	Author Proof	Editor Proof	Compile Proof Edits
	Apr 10, 2018		Submitted Apr 10, 2018 Penelope Passistant	Submitted Apr 10, 2018 Veronica Vendor	Submitted Apr 10, 2018 Fred Freelancer	Submitted Apr 10, 2018 Allan Author	Submitted Apr 10, 2018 Veronica Vendor Slip: 38 days	Submitted Apr 13, 2018 Allan Author	Due Apr 15, 2018 Polly Production	
	Apr 13, 2018		Submitted Apr 13, 2018 Penelope Passistant	Submitted Apr 13, 2018 Veronica Vendor	Submitted Apr 13, 2018 Fred Freelancer	Submitted Apr 13, 2018 Allan Author	Submitted Apr 13, 2018 Veronica Vendor	Submitted Apr 13, 2018 Allan Author	Submitted Apr 13, 2018 Polly Production	Due Apr 18, 2018 Penelope Passistant
	Apr 24, 2018		Due May 05, 2018 Penelope Passistant				Must Start: May 29, 2018 Slip: 13 days			
Ready for Production	Apr 30, 2018						Submitted May 02, 2018 Veronica Vendor	Due May 07, 2018 Allan Author	Due May 07, 2018 Polly Production	

Production Status Grid





Schedule Groups

Scheduling

Manage Schedule Groups
Add Schedule Group
Closed Schedule Groups

Submit | Cancel | Submit and Add Submissions to Group

Schedule Group Description:	Insert Special Character July 2018 *Maximum Schedule Group Description is*
Schedule Group Notes:	
Schedule Group Target Online Publication Date:	07/01/2018 (mm/dd/yyyy)
Schedule Group Target Publication Date:	07/01/2018 (mm/dd/yyyy)
Schedule Group Target Publication Volume:	7
Year:	2018
Schedule Group Target Publication Issue:	
Target Number of Submissions:	100
Page Budget:	75
Black and White Image Budget:	12
Color Image Budget:	12

Schedule Groups

Submissions with no Schedule Group

Check All Clear All	Action	Manuscript Number	Author Name	Article Title	Section/ Category	Article Type	Initial Date Submitted	Date Production Initiated	Submission Target Online Date
☐	Production Details Transmittal Form Linked Submissions	DEMOVS141-D-18-00001	mary mary (UNITED STATES)	Taming Temptation: Visual Perspective Impacts Consumption andWillingness to Pay For Unhealthy Foods		Original Study	Oct 3 2017 11:36AM	Jun 5 2018 6:14PM	
☐	Production Details Transmittal Form Linked Submissions	DEMOVS141-D-17-00001R1	mary mary (UNITED STATES)	Different Deadlines for Different Revision Decisions		Original Study	Dec 29 2017 2:32PM	May 9 2018 10:36AM	
☐	Production Details Transmittal Form Linked Submissions	DEMOVS141-D-18-00004	mary mary (UNITED STATES)	MS Number Test		Original Study	Feb 27 2018 11:31AM	May 7 2018 2:23PM	
☐	Production Details Transmittal Form	DEMOVS141-D-18-00011	mary mary (UNITED	Low atmosphere drifting balloons: platforms for environment monitoring and forecast improvement		Original Study	May 8 2018 3:45PM	May 8 2018 3:46PM	

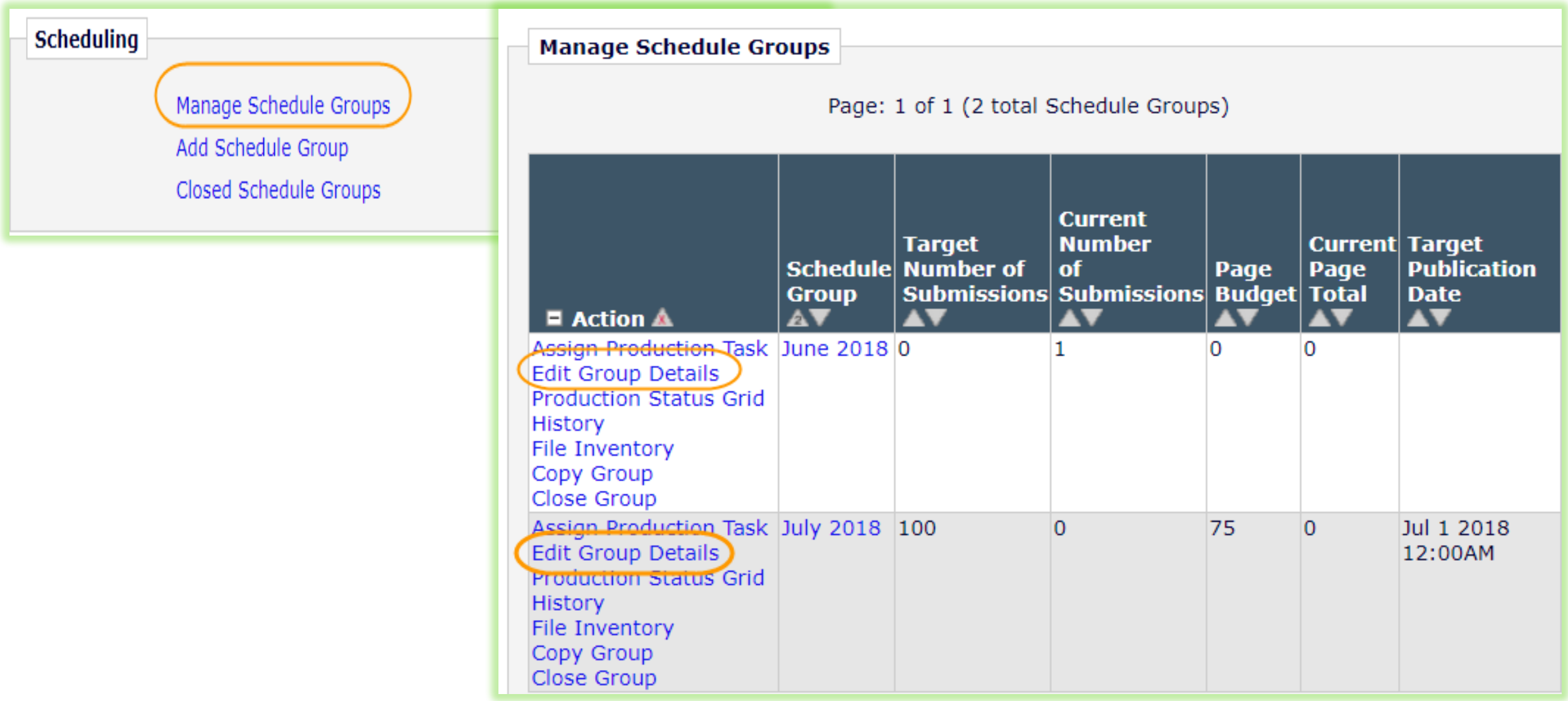
Schedule Groups

Production Status Grid

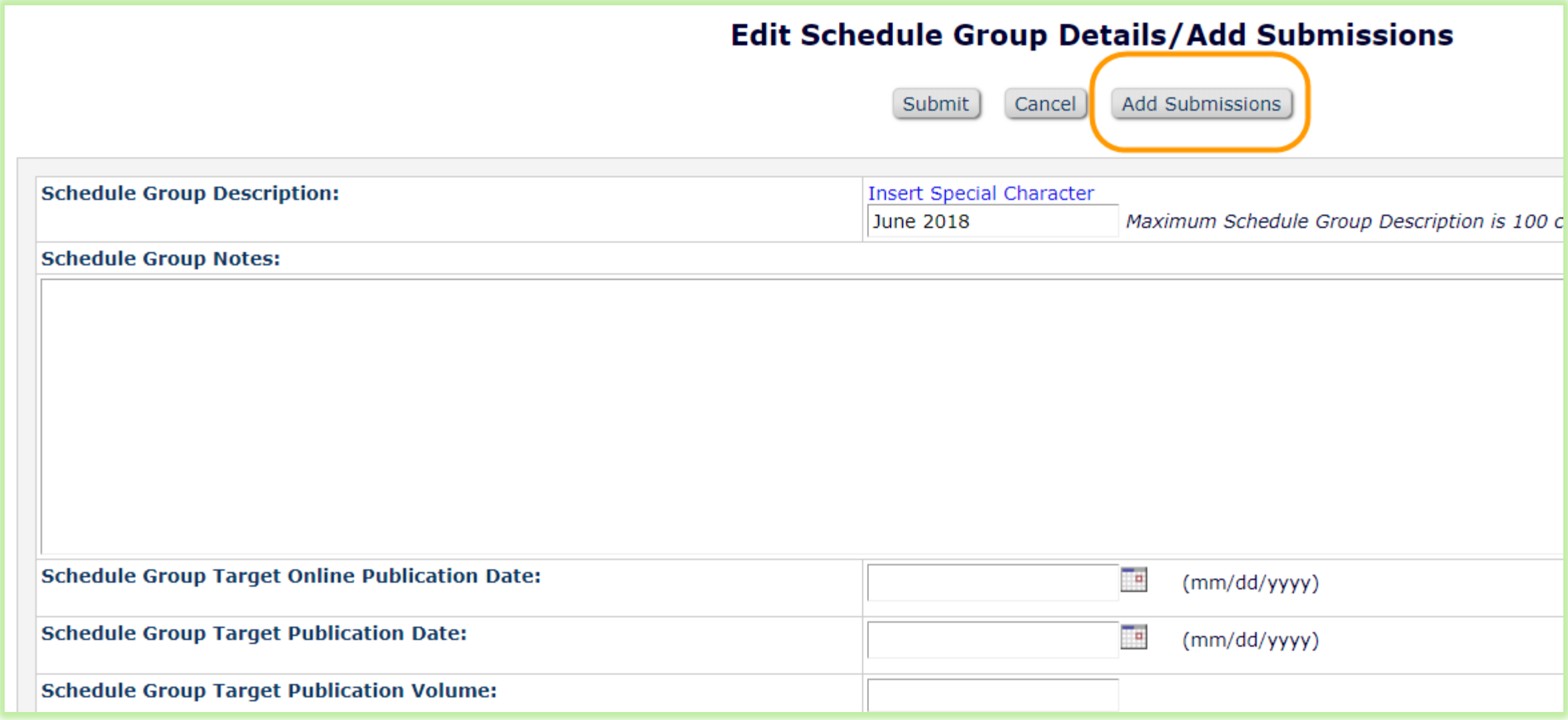
Editor Corrections/Ap of Proof	Final Proof Approval	Author Receives Final Proof	Schedule Group	Section Category	Article Type	Target TOC Position
Submitted May 09 2018 12:33PM Piper Production	Submitted May 09 2018 12:35PM Patricia Proof		June 2018	Basic Science Section	Original Study	1

Managing Schedule Groups

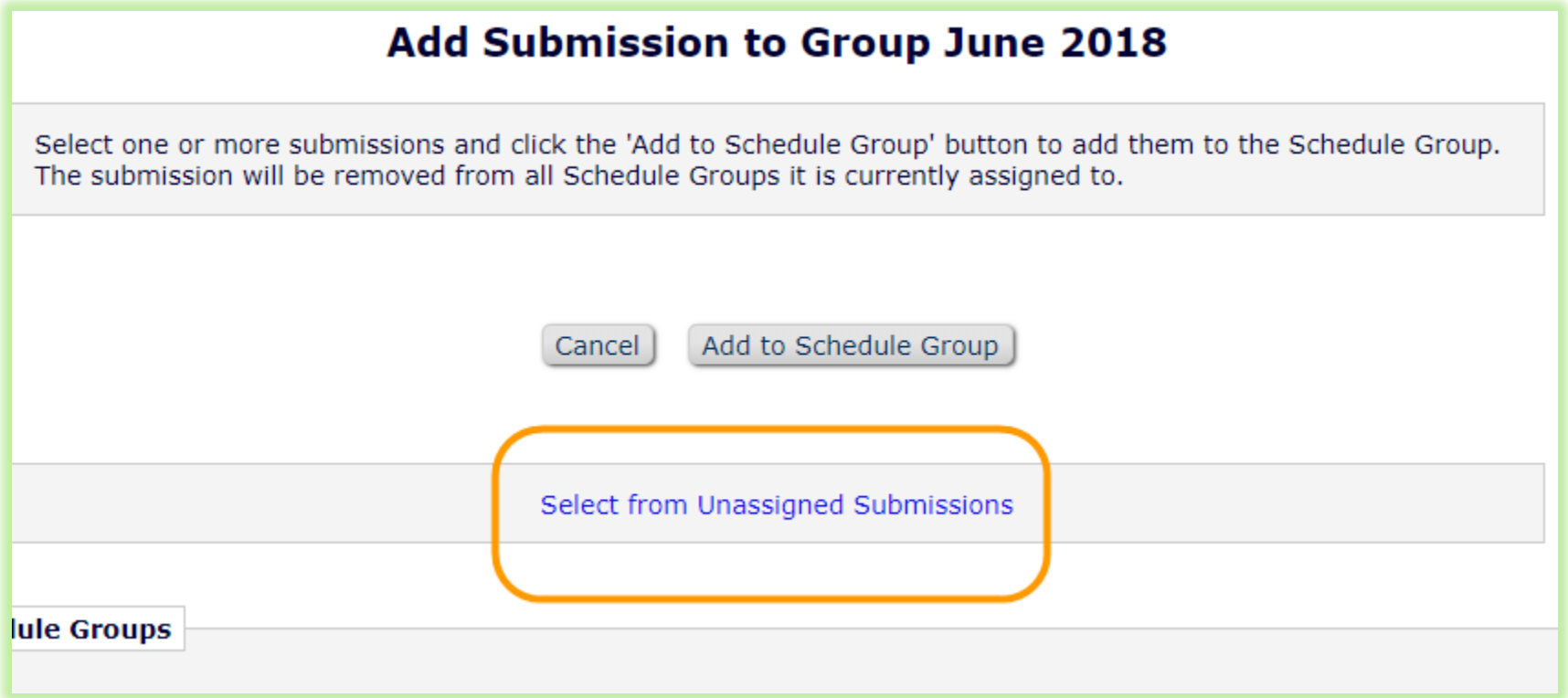
Managing Schedule Groups

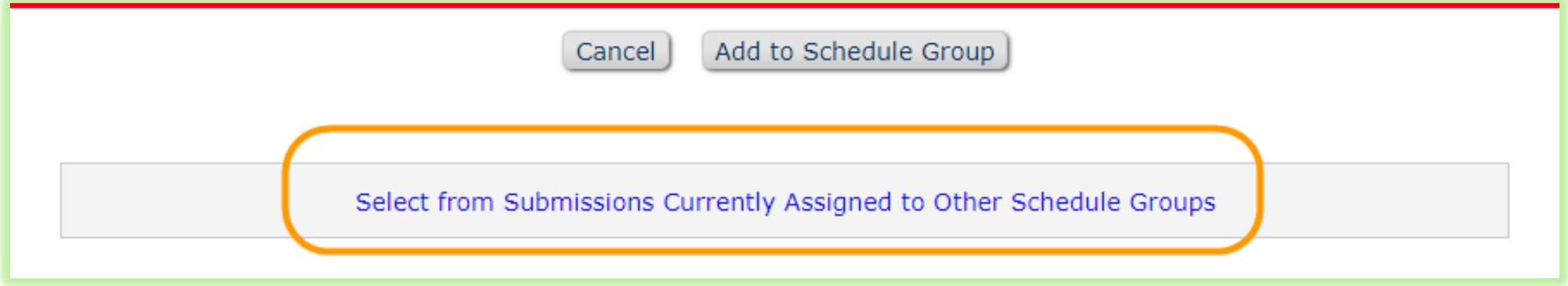


Managing Schedule Groups



Managing Schedule Groups





Assigning Schedule Group Production Tasks

Manage Schedule Groups

Action

- Assign Production Task
- Edit Group Details
- Production Status Grid
- History
- File Inventory
- Copy Group
- Close Group

Assign Production Task for Schedule Group

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

Schedule Group: October 2018

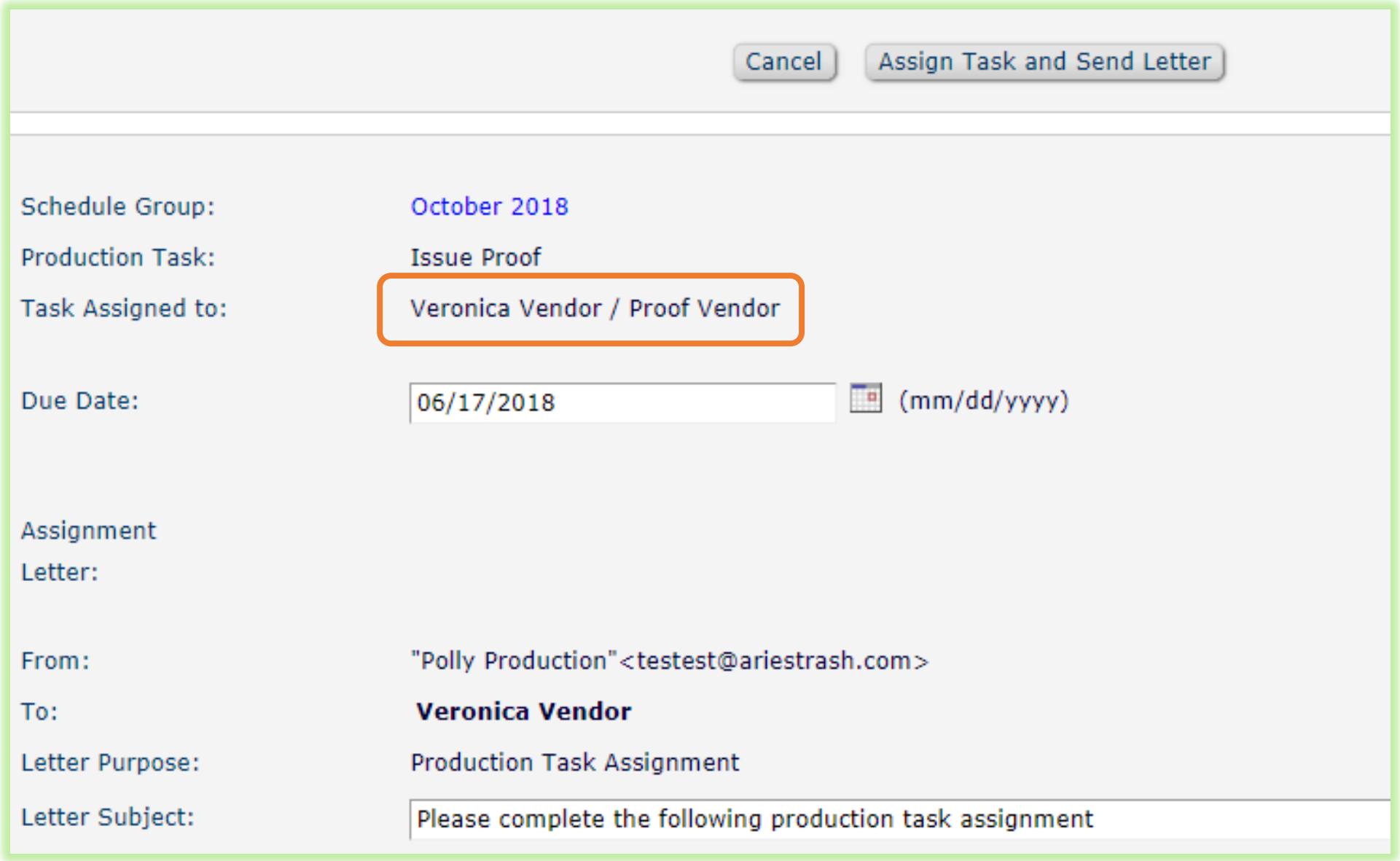
Production Task: Issue Proof

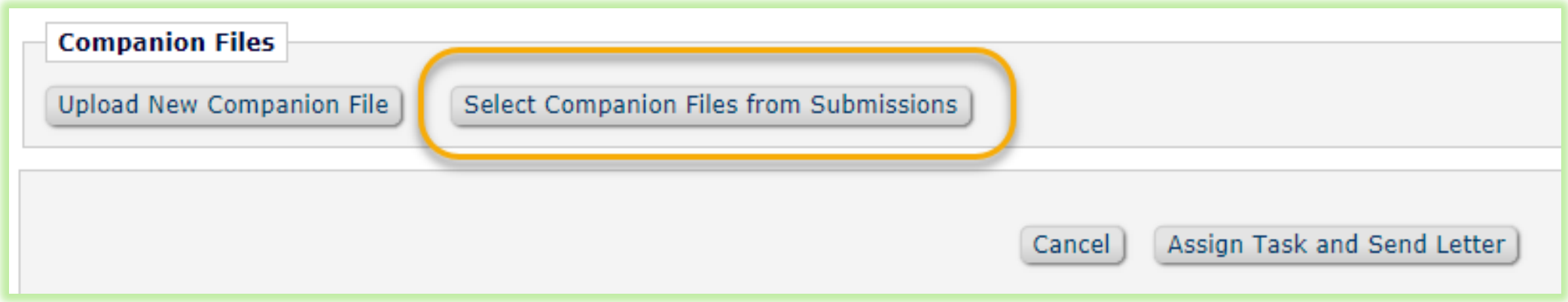
SCHEDULE GROUP TASK HISTORY

Date Task Assigned	Production Task	Date Task Due	Assigned By	Assigned To	Production Task Status	Date Task Closed	Closed By	Assigned Task Files
Apr 13, 2018	Issue Creation	Apr 18, 2018	Polly Production	Penelope Passistant	Completed	Apr 13, 2018	Penelope Passistant [Proxied by Polly Production]	No Assigned Files

Cancel | Proceed with Selected Task

Schedule Group Production Tasks





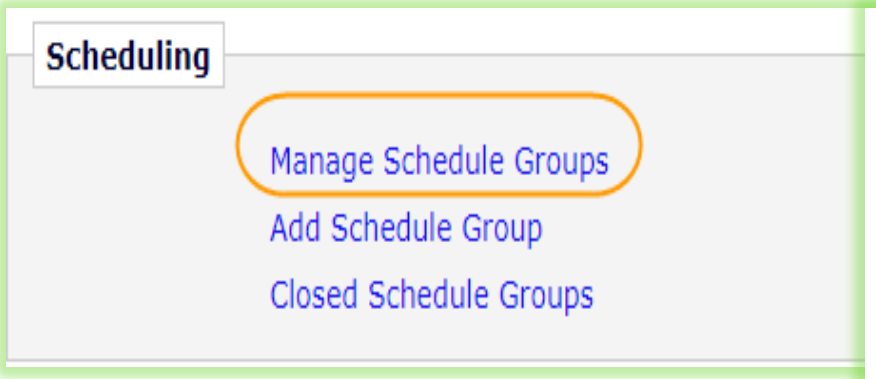
Associated Companion Files

Select File	Sub. TOC Position	Submission	Color Code	Item	Description
☐	4	JJDEMO-D-18-00002 Allan Author (UNITED STATES) Sample Paper for PM workflow		Converted Manuscript	Initial conversion
☐	4	JJDEMO-D-18-00002 Allan Author (UNITED STATES) Sample Paper for PM workflow		Copyedited Manuscript	copyeditor
☐	4	JJDEMO-D-18-00002 Allan Author (UNITED STATES) Sample Paper for PM workflow		Editor Proof	

Adding Headers to Schedule Groups

Adding Headers to Schedule Groups

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	Article Title	Submission Target Online Date	Black and White Image Count	Color Image Count
Remove Header Edit Header	1		Cover Image		0							
Production Details ! Transmittal Form Remove from Group	2	JJDEMO-D-18-00004	Original Study	Allan Author	0				Test of Create Submission	Jul 01, 2018	0	0
Remove Header Edit Header	3		Advertisement		0							
Production Details Transmittal Form Remove from Group	4	JJDEMO-D-18-00002	Original Study	Allan Author	0				Sample Paper for PM workflow		0	0
Remove Header Edit Header	5		CME Test		0							
Production Details Transmittal Form Remove from Group	6		Original Study	Allan Author	0				Testing for Staff Training		0	0



Manage Schedule Groups

Page: 1 of 1 (2 total Schedule Groups)

Action	Schedule Group	Target Number of Submissions	Current Number of Submissions	Page Budget	Current Page Total	Target Publication Date
Assign Production Task Edit Group Details Production Status Grid History File Inventory Copy Group	June 2018	0	1	0	0	

Table of Contents

Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	Article Title	Section/Category	Black and White Image Count	Color Image Count
Production Details Transmittal Form Remove from Group Linked Submissions	1	DEMOVS121-D-15-00001	Original Study	mary mary	0				Manuscript Title	Basic Science Section	0	0
Save Changes Cancel Changes	2	Cover										

Update TOC | Insert Header

Adding Headers to Schedule Groups

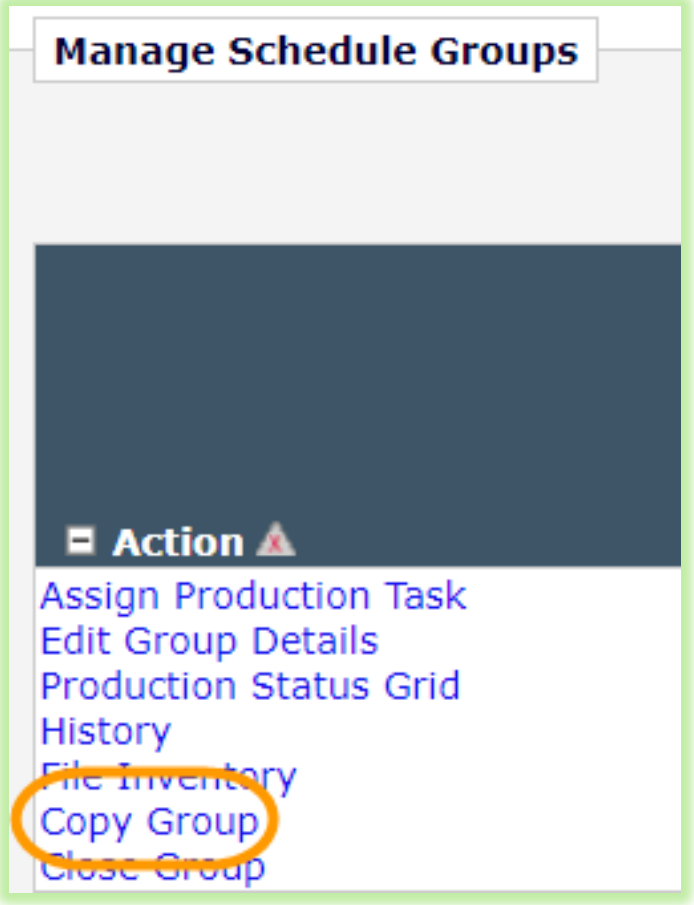
Table of Contents

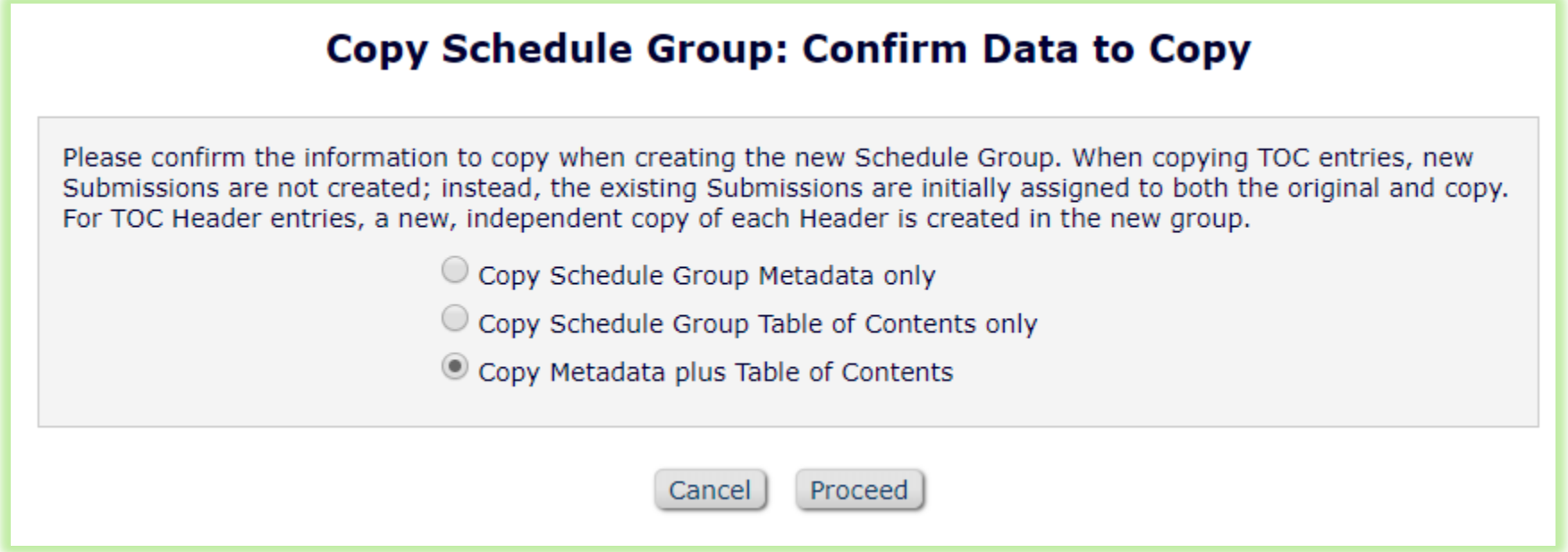
Actions	Target TOC Position	Manuscript Number	Article Type	Author Name	Target Number of Pages	Target Start Page	Target End Page	Production Status	Article Title
Production Details Transmittal Form Remove from Group Linked Submissions	1	DEMOVS121-D-15-00001	Original Study	mary mary	0				Manuscript Title
Remove Header Edit Header	2		Cover		0				

Update TOC | Insert Header

Copying Schedule Groups

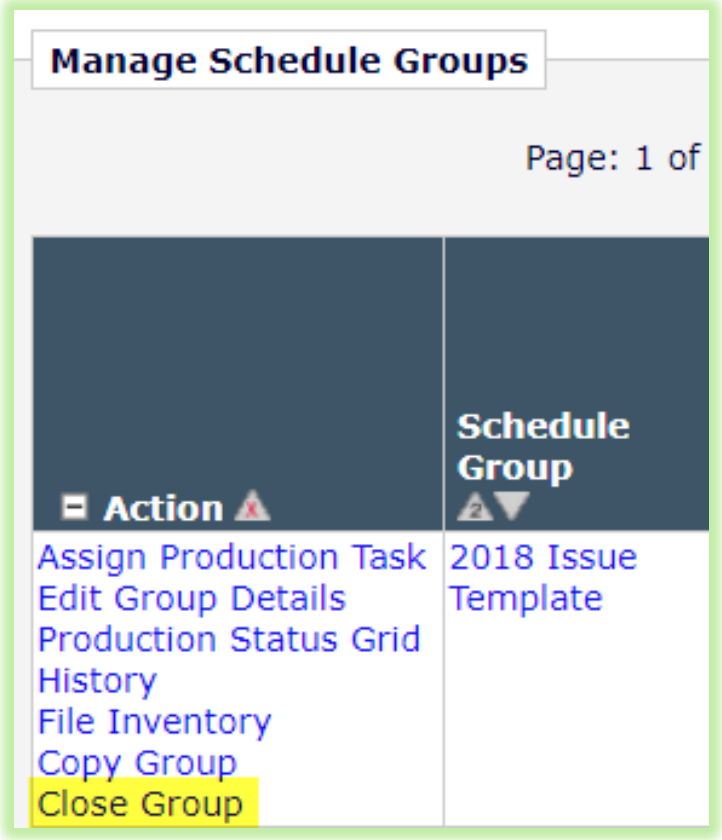
Copying Schedule Groups





Closing Schedule Groups

Closing Schedule Groups



The "August 2018" Schedule Group has open production tasks associated with it:

- 3 Submissions have open submission production tasks.
  - Click this Production Status Grid link to cancel the Close Group process and switch to a list of production tasks associated with this Schedule Group.

- 1 Schedule Group Production Task is still in progress.
  - Click this History link to display information for this Schedule Group.

To cancel these tasks automatically and close the group, click one of the following buttons depending on whether you want to send cancellation letters. Submissions that have no open tasks but are still in production will have production ended on them.

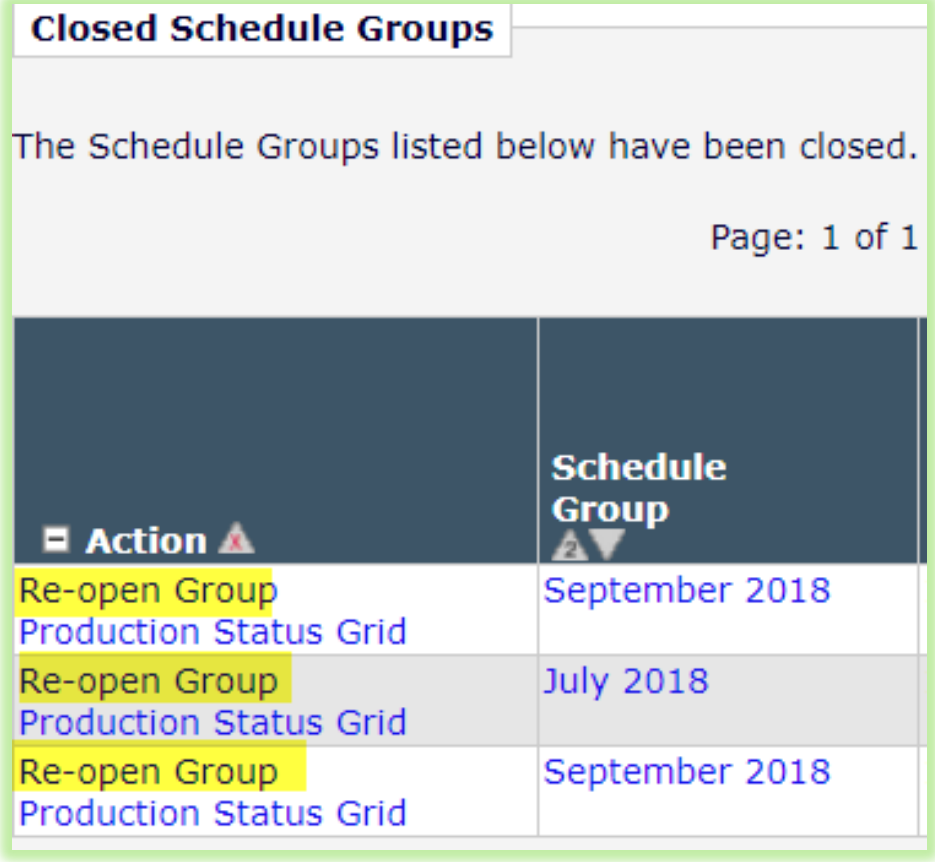
Close Group and Send Letters

Close Group without Sending Letters

To leave the group open without cancelling any tasks, click 'Do Not Close Group'.

Do Not Close Group

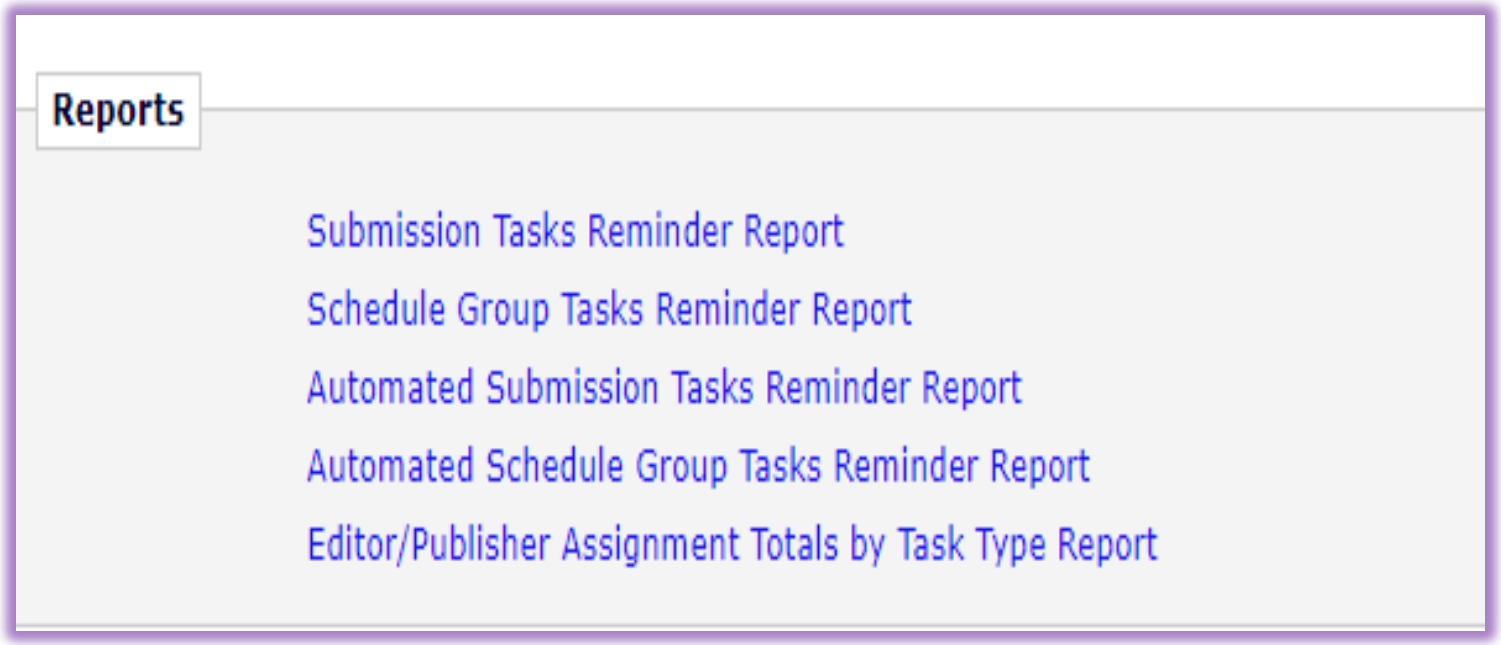
Closing Schedule Groups



- Schedule groups can be re-opened once they are closed

ProduXion Manager Reporting

Produxion Manager Reporting



Automated & Manual Reports are offered in ProduXion Manager

Questions?

Thank
you