



ProduXion Manager[®]

Functionality Checklist

✓	Provides workflow tracking for journals, reference works and other structured scholarly publications.
✓	Imports files and XML metadata from Editorial Manager, and from third-party peer review systems such as ScholarOne Manuscripts [®] , EJournalPress [®] , and proprietary systems.
✓	Manuscripts can (optionally) be manually entered into ProduXion Manager.
✓	System administrators can define an unlimited number of user roles .
✓	Each role has its own profile that determines the functionality available to a user with that role designation.
✓	Supports validated ORCID and ORCID single-sign-on .
✓	Supports Open Funder Registry for funder identification.
✓	Supports Ringgold for institutional identification.
✓	Supports latest version of JATS 1.2Ametadata import and export.
✓	Supports MECA-compliant import/export transmittal.
✓	System can be used to create workflows based on configurable production tasks.
✓	Production task definitions include task name, default assignment letters, target completion timeframes, and designated assignees by role (e.g. Author, copy editor, vendor, etc.), file definitions, etc.
✓	Tasks can be assigned and completed manually or by machine-to-machine transfer.
✓	Tasks can be batch assigned.
✓	Tasks can be triggered automatically .
✓	Tasks can be chained.
✓	Late tasks are automatically flagged.
✓	Late tasks are automatically added to the "At risk" submissions folder on the main menu.
✓	Appropriate files and data can be accessed by authorized staff, Authors, Editors and vendors to complete tasks.
✓	Staff can easily identify users with pending or late production tasks, and trigger reminder emails through reporting functionality.
✓	Staff can configure automated reminders based on pre-selected criteria (e.g. send reminder 2 days before copy editing is due).

✓	Metadata associated with each manuscript (such as production notes, Author information, etc.) are accessible to production staff by clicking a “details” link.
✓	Production notes can be maintained at both the manuscript level and/or associated with a particular issue.
✓	Manuscript records can contain an unlimited number of companion files (‘work in progress’), such as proofs and copyedited manuscripts.
✓	Appropriately authorized users can check-in and check-out production files based on task assignment (version control).
✓	Task completion can include the upload of appropriate files.
✓	Task completion can include configurable web forms to respond to questions (e.g. “How much time did you spend copy editing?”).
✓	Authorized system administrators can use web-based configuration tools to enable real-time modifications to configuration options (e.g. task definitions) and workflow steps.
✓	System includes functionality to define issues (schedule groups) with associated metadata (e.g. page budget, volume number, issue number, etc.).
✓	Schedule group functionality can be used to support books workflows .
✓	Issue “budgets” (e.g. page budget) are automatically recalculated based on the manuscripts included in the issue.
✓	Issue management: manuscripts can be pushed or pulled into issues.
✓	Manuscripts can be assigned to more than one issue at one time.
✓	Manuscripts can be re-sequenced within issues to create a TOC.
✓	Issues can include section headings.
✓	Manuscript metadata (e.g. page numbers) can be manually entered or imported into issues.
✓	Tasks can be assigned at the issue level.
✓	Files can be stored at the issue level (e.g. cover art).
✓	Staff can easily track overall manuscript production status (e.g. ready for composition).
✓	Staff can search for in-production manuscripts based on selected criteria.
✓	Staff can create and then append “Quick Searches” or short cuts to frequently run searches to main menus.
✓	Staff can search people records based on selected criteria.
✓	Staff can use powerful “proxying” capabilities that allow appropriately authorized administrators to push through tasks that have been assigned to other users.
✓	Production staff can configure an unlimited number of email letters in HTML or plain text format.
✓	Letters appear in appropriate drop-down menus (e.g. during task assignment) or can be triggered by automatic workflow “events”.
✓	Letters can be modified by production staff in real time.
✓	Letters can include merge fields such as Author name, manuscript title, task due date, etc.
✓	Letters can include “deep links” so that recipients can complete activity without remembering log-in information.
✓	Staff can send “Ad Hoc” letters at any time from manuscript records or schedule group/issue records.
✓	Production staff can quickly surface schedule alerts and other workflow information on the production status grid by toggling to view all the manuscripts, or just those designated to a specific schedule group/issue.
✓	Authorized production staff have one-click access to a historical audit trail that provides all transactions, letters and status changes associated with each manuscript.
✓	Uploaded image files can be checked automatically against journal-defined image publication criteria.
✓	Bibliographies can be validated automatically through external databases such as Crossref or PubMed.
✓	Bibliographies can be linked automatically to external databases so that missing or incorrect information can be retrieved from the target database.
✓	Bibliographies can be automatically re-formatted to the publication’s desired reference style.
✓	DOIs can be assigned according to the publisher’s preferred DOI format.

✓	Manuscript metadata can be transmitted to external databases such as PubMed and Crossref during the production workflow.
✓	Production staff can configure NIHMS-PubMed deposit via a production task, including embargo period rules using PolicyManager.
✓	ProduXion Manager complies with ISO 10646, the standard which enables the storage of non-roman and diacritic characters. Symbols such as π can be reliably transferred from peer review to production and online delivery.
✓	ProduXion Manager provides tools for normalizing data to ISO 3116, the standard which specifies country names and codes. Country designations can be reliably mapped as data is transferred between systems.
✓	RightsLink for Open Access can integrate with ProduXion Manager allowing for the processing of APC estimates driven off of standardized metadata such as Ringgold Institutional Identifiers and FundRef IDs.
✓	Payment due fee collection can be triggered during production workflow.
✓	System provides comprehensive, configurable, graphical reporting tools .
✓	Reporting can be configured to include cross-journal groupings that can be assigned to specific roles.
✓	Production staff can utilize 500 flags that are specific to PM to quickly communicate details about a submission, including custom question responses.
✓	Production staff can see when a particular flag was turned on or off in history.
✓	Color-coding can be used to quickly communicate information about file types or workflow statuses.
✓	System is securely hosted in mirrored data centers to ensure COB (continuity of business) and disaster protection.
✓	When using in conjunction with Editorial Manager, production tasks can be processed in parallel to the editorial workflow .
✓	When using in conjunction with Editorial Manager, editorial tasks can be assigned and completed without initiating production.
✓	ProduXion Manager is available in multiple languages : German, French, Simplified Chinese, Japanese and Spanish.
✓	Staff administrators can configure production workflows per article type.