Welcome to PMUG 2015







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Agenda

Pre-Version 12.0 Automation Version 12.0 Automation

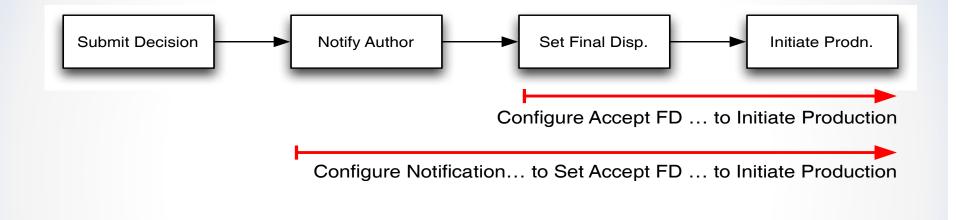
Pre-Version 12.0 Automation Overview

- Notify Author can *automatically Set Final Disposition* and *Initiate Production*
- Setting Final Disposition (manually) to 'Accept' or 'Accept on Submission' can *automatically Initiate Production*
- Initiating Production can *automatically assign First Task in Submission Production Task Workflow*
- Submitting a task can *automatically assign next task in Submission Production Task Workflow,* or *End Production*
- Submitting a task (via FTP) can automatically update submission and Schedule Group metadata
- Closing a Schedule Group *will End Production on all submissions in the group* (that have no open tasks)

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- Notify Author can *automatically set Final Disposition* and *Initiate Production*
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Automating Production Initiation



Author Notification triggers FD and Initiate Production

- Triggered when Editor Sends Accept Notification to Author
- Bypasses the Assign Production Task/Assign to Schedule Group UI; editor remains solely within Editorial Flow

Notify Author Manuscript Number: Test_90-55_0004		Preview Letter Save	Cancel Save and Close	Send Now		
Title: Testing for 90-55 - Example 04	Editor Decision:	Accept as is				
To notify the author of the Final	Modify Decision:	Accept as is	~			
this assid prev Anne Author AAu Retu The Final Disposi	ssi rev Anne Author AAuthor@ariessc.com					
		urn to All Submission Submissions with Fir Production Return to I	nal Disposition Tasks Menu			

Configuration: Author Notification sets FD to Accept – PolicyManager, Edit Article Type

Production Tracking Parameters: Use Submission Workflow:	All Submission Production Tasks 💟
Automatically set the Final Disposition to 'Accept' when the Author is notified of the selected Decisions:	Accept as is

Configuration: FD triggers Automatic Production Initiation - PolicyManager

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' only 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:	nitiate Production upon Setting Final Disposition to 'Accept and Transmit'		
	Cancel Submit		

Manual Final Disposition triggers Initiate Production

- Based on RoleManager permission 'Set Final Disposition' and PolicyManager settings on 'Configure Automatic Production Initiation'
- Can be used when Editor manually sets FD to 'Accept' or 'Accept on Submission'

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Set Final Disposition

Regular Submissions:

☑ Initiate Production upon Setting Final Disposition to 'Accept'
■ Initiate Production upon Setting Final Disposition to 'Accept on Submission'

Manual Final Disposition triggers Initiate Production

- Editor first proceeds through the Transmittal Form process. At the final page, confirming the FD will Initiate Production automatically (if configured)
- What the user sees after setting FD depends on their Role Permissions:
 - Editor can assign the submission to a Schedule Group (and/or assign a task) OR
 - o Editor sees no production-related UI

ProduXion Manager

- Create Submission
- Initiate Production Manually
- Allow Task Assignment and Assignment to Schedule Group when Initiating Production

Manual Final Disposition Triggers Initiate Production

• For an Article Type NOT configured to set the FD Automatically, Automatic Production Initiation can trigger when the FD is manually set to 'Accept' or 'Accept on Submission'

Set Final Disposition Manuscript Number: RE-Test_90-55_K001 "Re-testing 90-55 - Part J01"

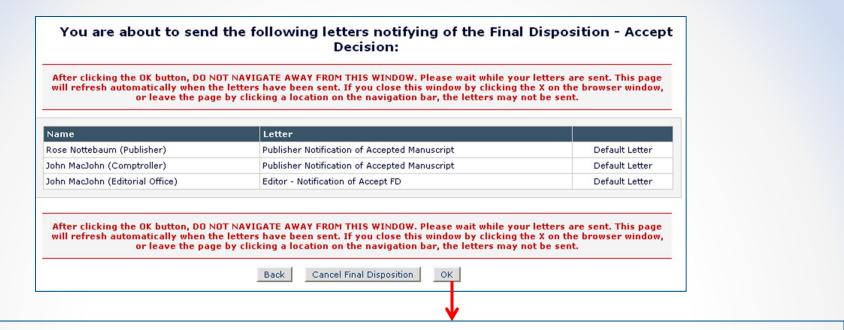
Setting the final disposition completes the peer-review process. You may only set a Final Disposition of "Accept" or "Reject" after you notify the author of the editor's decision.

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.

Production Status : Not in Production

Final Disposition: Accept





Editor *without* 'Allow task assignment...' permission is returned to originating folder or search submissions interface; production has been initiated

All Submissions with E		
	Page: 1 of 1 (35 total su	
Action	Manuscript Number ▲▼	Article Type
View Submission	24.4	<u> </u>
Details V		
History		
File Inventory		
Edit Submission Solicit Commentary		
Assign Editor	To at 00 EE 0010	Rapid
Notify Author Set Final Disposition	Test_90-55_0012	communicat
Initiate Production		
View Reviews and Comm	ente	

You are about to send the following letters notifying of the Final Disposition - Accept Decision:

After clicking the OK button, DO NOT NAVIGATE AWAY FROM THIS WINDOW. Please wait while your letters are sent. This page will refresh automatically when the letters have been sent. If you close this window by clicking the X on the browser window, or leave the page by clicking a location on the navigation bar, the letters may not be sent.

Name	Letter	
Rose Nottebaum (Publisher)	Publisher Notification of Accepted Manuscript	Default Letter
John MacJohn (Comptroller)	Publisher Notification of Accepted Manuscript	Default Letter
John MacJohn (Editorial Office)	Editor - Notification of Accept FD	Default Letter

After clicking the OK button, DO NOT NAVIGATE AWAY FROM THIS WINDOW. Please wait while your letters are sent. This page will refresh automatically when the letters have been sent. If you close this window by clicking the X on the browser window, or leave the page by clicking a location on the navigation bar, the letters may not be sent.

Back Cancel Final Disposition

Editor *with* 'Allow task assignment...' permission can immediately assign a SG and Production Task

OK

Initiate Production and Assign Production Task for Manuscript Number: RE-Test_90-55_K001, DOI: 10.1234/.000023484 Anne Author (UNITED KINGDOM) : "Re-testing 90-55 - Part J01"

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:	(mm/dd/yyyy)

Initiate Production and Assign Production Task for Manuscript Number: CAROLINEDEV101-D-13-00007 "submission with ref checking and AQC"

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.

Schedule Group Target Online Publication Date: Jun 24 2015 12:00AM Schedule Group Target Publication Date: Jun 30 2015 12:00AM Submission Target Online Publication Date: Image: Cancel Proceed	Assign Submission to Schedule Group:	June Issue
Submission Target Online Publication Date:	Schedule Group Target Online Publication Date:	Jun 24 2015 12:00AM
	Schedule Group Target Publication Date:	Jun 30 2015 12:00AM
	Submission Target Online Publication Date:	(mm/dd/yyyy
	Cancel	Proceed
	Cancel	Proceed

Initiate Production for Manuscript Number: CAROLINEDEV101-D-13-00007 "submission with ref checking and AQC"

Please confirm and submit the information below. Click the 'Back' button to change the information for the current submission.

Back

Submit	Submit and Assign Production Task
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Target TOC Position	ManuscriptNumber	Article Title	Article Type	Target Number of Pages	Start	Target End Page	Black and White Image Count	Color Image Count
1	CAROLINEDEV101-D-13-00007	submission with ref checking and AQC	Original Study	0	0	0	0	0
		Back Submit Submit and A	Assign Production	n Task				

Initiating Production Other Options

- Production Initiation can be done manually via the <u>Initiate Production</u> link at any time prior to Author notification or setting the FD.
 - Based on RoleManager permission 'Initiate Production Manually'
- Submissions can be imported directly into Production if you don't use EM

Automation Overview: Pre-Version 12.0

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- Notify Author can set Final Disposition and Initiate Production automatically
- Initiating Production can assign First Task in Workflow automatically
 - Submitting a task can assign next task in Workflow, or End Production automatically
 - Submitting a task (via FTP) *can update submission metadata*
 - Closing a Schedule Group *will End Production on all submissions in the group* (that have no open tasks)

Automatically Assign First Task in Workflow

- Select Submission Production task setting 'Assign Automatically when Production is initiated (if this is the first task in the workflow)'
- PolicyManager Add/Edit Submission Production Task

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

- Assign Automatically when Production is initiated (if this is the first task in the workflow)
 - Assign Automatically when previous Task is completed

Automatic End Production when the Task is Completed and there are No Other Open Tasks in the Workflow.

End Production Automatically after this task is Completed

Automation Overview: Pre-Version 12.0

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- Initiating Production can assign First Task in Workflow automatically
- Submitting a task can assign next task in Workflow, or End Production automatically
 - Submitting a task (via FTP) *can update submission metadata*
 - Closing a Schedule Group *will End Production on all submissions in the group* (that have no open tasks)

Automatically Assign Next Task in Workflow

 Select Submission Production task setting – 'Assign Automatically when previous task is completed' (PolicyManager – Add/Edit Submission Production Task)

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

Assign Automatically when Production is initiated (if this is the first task in the workflow)

Assign Automatically when previous Task is completed

Automatic End Production when the Task is Completed and there are No Other Open Tasks in the Workflow.

End Production Automatically after this task is Completed

End Production when Task is Submitted

- Select Submission Production task setting 'End Production Automatically after this task is Completed'
 - If there are other open tasks in the workflow, production will *not* be ended.

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

 $\hfill\square$ Assign Automatically when Production is initiated (if this is the first task in the workflow)

Assign Automatically when previous Task is completed

Automatic End Production when the Task is Completed and there are No Other Open Tasks in the Workflow.

End Production Automatically after this task is Completed

Pre-Version 12.0 Task Workflows

- Configured via *Define Submission Workflows* page (PolicyManager)
- Associated with Article Types on *Edit Article Type* page (PolicyManager)
- Submission of task can trigger next task immediately after it in the workflow

'Automatic Task Triggering' Example

'Basic Workflow'

'Simple Workflow'

- Format MS
- Copy Edit
- Check Artwork
- Typesetting

- Format MS
- Typesetting
- Printing

If 'Typesetting' is configured to be Assigned Automatically, then 'Check Artwork' will trigger it in 'Basic Workflow', while 'Format MS' will trigger it in a 'Simple Workflow'

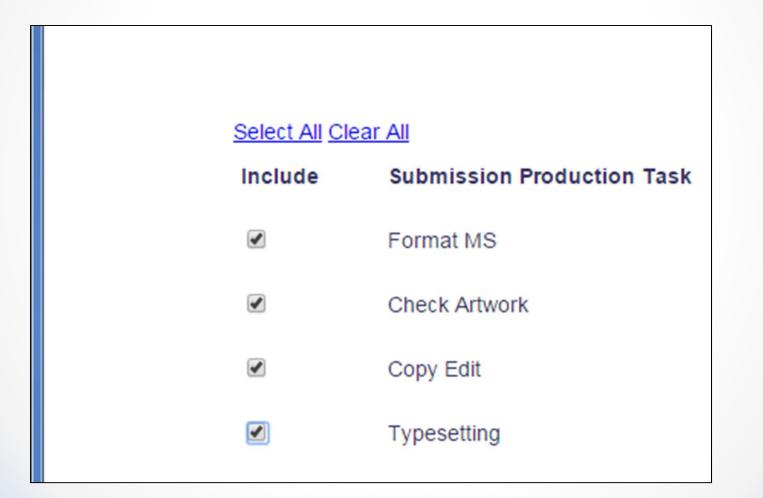
Task selection – Basic workflow – Pre-12.0

Add/Edit Submission Workflow

Listed below are previously created Production Tasks. Please select each task that you wish to use in this Workflow. Once this Workflow is linked to an Article Type, only these tasks will be available for assignment on submissions of that Type. Where a task is also configured to appear in the Production Status Grid, selected Task types will appear normally while unselected Task types will appear shaded-out for submissions using this Workflow.

				Insert Special	Character	
	New Workflow Name:	Basic Workflow - 11.2				
		Maximum Workflow Name is 100 characters				
		Cancel	Submit			
Soloct All Clor	or All					
Select All Clea			Role	ls	Used for Must	Included in
Include	Submission Production Tas	sk	Family	Milestone	Start Dates	Status Grid
	Format MO		Editor/			
	Format MS		Publisher			
1	Check Artwork		Editor/			1
C	CHECK ARWORK		Publisher			•
	Copy Edit		Editor/		1	1
			Publisher			•
	Typesetting		Editor/			~
			Publisher			
			E dite al			

Task selection – Basic workflow



Task selection – Simple workflow

Select All Clear	<u>· All</u>
Include	Submission Production Task
	Format MS
	Check Artwork
	Copy Edit
	Typesetting
	Printing

Assign Workflow to Article Type Edit Article Type -PolicyManager

Production Tracking Parameters:

Use Submission Workflow:

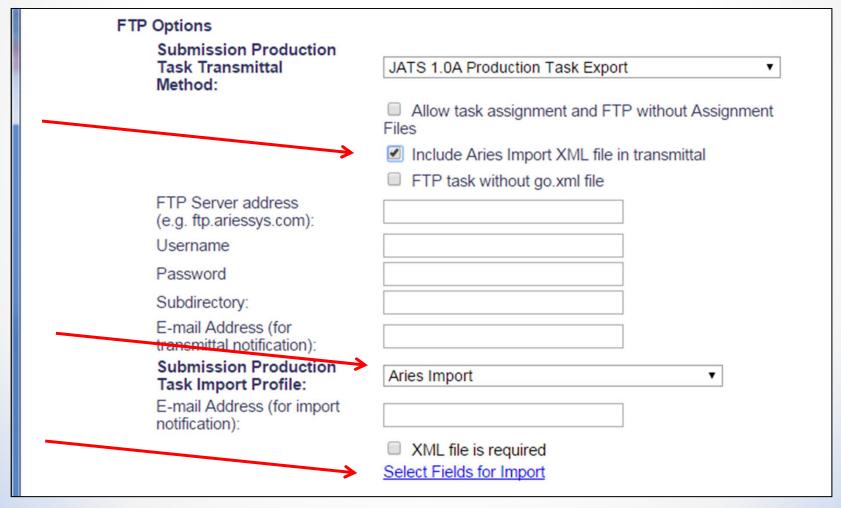
Automatically set the Final Disposition to 'Accept' when the Author is notified of the selected Decisions: Basic Workflow All Submission Production Tasks Basic Workflow Simple Workflow Standard Production Tracking

Translated manuscript workflow

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'Aries Import' available PolicyManager – Add/Edit Submission Production Task



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:
- Additional Manuscript Details
- Schedule Group TOC Information
 - Target Table of Contents Position
 - Target Start Page
 - Target End Page
 - Target Number of Pages

Expand All	Collapse All
Cancel	Submit

Automation Overview: Pre-Version 12.0

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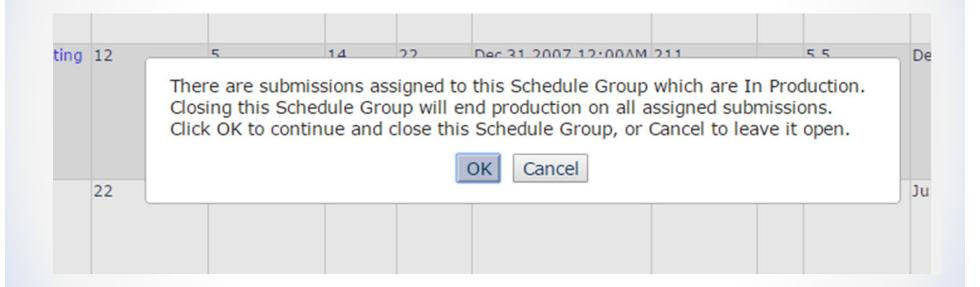
Close Schedule Group

• Cannot close group if there are open SG Tasks or Submission Production tasks

Assign Production Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group	German Schedule Group	The "Fourth Schedule Group" Schedule Group cannot be closed because it has open production tasks associated with it. These must be cancelled or submitted by the assignee before this Group can be closed.
Assign Production Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group	Schedule group with deci	 4 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.
Assign Production Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group	English Schedule Group	 9 Schedule Group Production Tasks are still in progress. Click this History link to display information for this Schedule Group.
Assign Production Task Edit Group Details	Schedule Group for June	2009 12 4 200 125 Jun 15 2

Close Schedule Group

• *Can* close group if no open tasks, will automatically end production on all submissions in group



Ending Production can copy Target Publication values to Actual Values

Configure Automatic Copy of Target to Actual Publication Information

Set/Check the 'Copy Submission Target Publication to Submission Actual Publication Information' box to have the system automatically copy a submission's Target Publication Information to its Actual Publication Information when production is ended on a submission, or when the Schedule Group to which the submission belongs is closed.

Select the radio button 'Do not overwrite existing values for Actual Publication Information' to skip the Target to Actual copy for any field where there is an existing Actual Publication value. Note: if there is no value in an Actual Publication Field, the Target value will be copied in.

Select the radio button 'Overwrite existing values for Actual Publication Information' to copy Target information for all fields into the matching Actual information fields, overwriting any existing values.

When Production is Ended on a Submission or a Schedule Group is Closed:	Copy Submission Target Publication Information to Submission Actual Publication Information
	 Do not overwrite existing values for Actual Publication Information Overwrite existing values for Actual Publication Information

Cancel	Submit

Version 12.0 Enhancements

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Version 12.0 Enhancements

- Enhanced Submission Production Task Workflow options
- Automated reminders for Production Tasks
- Automatic cancellation of Production Tasks when Closing Schedule Group
- JATS Manuscript Import ProduXion Manager
- Imports initiating production can now trigger the first task in the workflow
 - Specific Import methods

Enhanced Submission Production Task Workflow Options

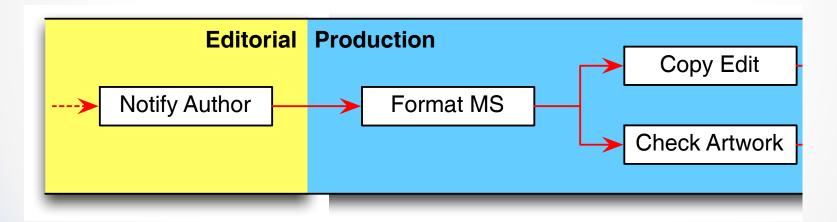
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Enhanced Submission Production Task Workflow Options

- Pre-version 12.0, automatic task assignment supports linear workflow only (Format Manuscript -> Copy Edit -> Check Artwork ->Typesetting)
 - If Copy Edit and Check Artwork need to happen simultaneously, Copy Edit can be assigned automatically, then Check Artwork needs to be assigned manually.

12.0 Workflow

- Production starts with an in-house Format MS (triage/cleanup) task
- In 12.0, after Format MS is completed, manuscript can go to Copy Edit and Check Artwork *at the same time*

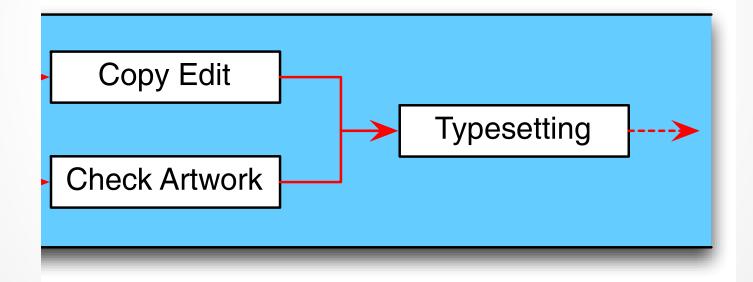


Enhanced Production Task Workflow Options

- Pre-version 12.0, if Typesetting must wait for both Copy Edit and Check Artwork, then Typesetting must be assigned manually.
 - No way for system to automatically hold off assigning Typesetting until both Copy Edit and Check Artwork are completed (if they take place simultaneously).

12.0 Workflow

• Typesetting starts automatically, but only when *both* Copy Edit AND Check Artwork are complete.



Workflow Creation – 12.0

PolicyManager Main Menu:

- 'Configure Submission Production Tasks' link enhanced now 'Configure Submission Workflows and Production Tasks'
- 'Define Submission Workflows' no longer a separate link



Configure Submission Workflows and Production Tasks

- 'All Submission Production Tasks' is Standard default workflow on the new page
- *New*: Ability to create more complicated production task workflows (for both standard and custom workflows)

Configure Submission Workflows and Tasks

Listed below are previously created Submission Workflows, including the system-defined 'All Submission Production Tasks' workflow; edit this workflow to define new Task Types, or remove/hide unwanted ones.

You may Add, Edit or Remove your own Custom Workflows. All Workflows define a set of Submission Production tasks and the relationships between them, such as the order of Tasks and Trigger Task links for Automatic Assignment. To use any Workflow, it must be associated with the appropriate Article Types via the *Edit Article Types* page; Task Assignment for submissions of these Types is then limited to tasks in the Workflow.

Standard All Submission Production Tasks		<u>Copy</u>	Edit
Custom Submission Workflows Basic Custom Workflow Simple Custom Workflow	<u>Remove</u>	<u>Copy</u> <u>Copy</u>	<u>Edit</u> Edit

Custom Automated Workflow Creation

- First create (or edit) Submission Production Tasks to make them automated tasks (if full automation desired)
- Automated Task Assignment PM has to know:
 - If task is first in workflow, is it automatically assigned?
 - If task is *not* first in workflow, which task completion(s) trigger its assignment?
 - Who (individual) is *Assigning* the task
 - Who (individual) is *Receiving* the task
 - What files need to be automatically assigned?
- Automated Task Submission by FTP PM has to know:
 - When files are submitted by FTP, with which Submission Item Type should they be automatically associated?
 - Should any metadata be overwritten?

- "Add New Task" functionality relocated in 12.0
- Edit the 'All Submission Production Tasks' Workflow.
- Enter a Task Name and click "+Add New Task Type"

Order	Task Type (+=Mi estone)		Assign if First Task ⁱ	Trigger Ta
1	Copyedit [Edit]			
2	Check Artwork [Edit]			
3	Typesetting [Edit]			
4	Review Page Proofs [Edit]			
5	Press Release Review [Edit]			
6	Publish Ahead of Print [Edit]			
Update	T T	Insert S	pecial Character	

• Select 'Assign Automatically when Production is initiated (if this is the first task in the workflow)'

Add Subn	nission Production Task
	Cancel Submit
New Production Task Name:	Insert Special Character Format MS Maximum Production Task Name is 100 characters
Assignment Options	
	actions listed below. Because this process occurs automatically you must gnor and a specific user to receive the task. You should also configure one unless this task is not used to process files.
	matically when Production is initiated (if this is the first task in the workflow) matically when all Trigger Tasks are completed (if configured in the

• Select one or more Roles and an Individual PERSON to be associated with the automatically assigned task as the *task assignor*

Only roles with the "Assign Production Task" permission appear in this list. You may select multiple roles or de-select a role by clicking on an item while holding down the CTRL key (Windows) or Apple/Command key (Mac). If the task is configured for Automatic Assignment, you must select a single person who will be the sender for all tasks assigned automatically.

Can be Assigned by:

Editor-in-Chief	*
Managing Editor	
Production Team	
	Ŧ

A state of a California

Mary François Smith, Managing Editor Richard Wynne, Managing Editor Mary Yram, Managing Editor

- Select a Role and individual PERSON to be the automatically assigned *task recipient*
- (If FTP'ed, still need to select a task recipient.)

Can be Assigned to:	Corresponding Author only
	Selected Editor/Publisher Roles only
role by clicking on an item wh	Production Task" permission appear in this list. You may select multiple roles or de-select a nile holding down the CTRL key (Windows) or Apple/Command key (Mac). If the task is ignment, you must select a single person to be the recipient of all such tasks assigned
	Artwork Editor Copyeditor Editor-in-Chief Managing Editor role with no one assigned to it Compositor Production Team for Assignment' is enabled, files in the submission File Inventory that match the configured elected for manual task assignment or will be automatically included when a task is assigned
	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.

• Select Item Types to be 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.

Corrected Proofs Cover Letter	
Figure	
Manuscript	
Transferred File	
Page Proofs	
Profile	-

• If task is to be submitted via FTP, select Item Type to be automatically associated with ftp'ed-in files

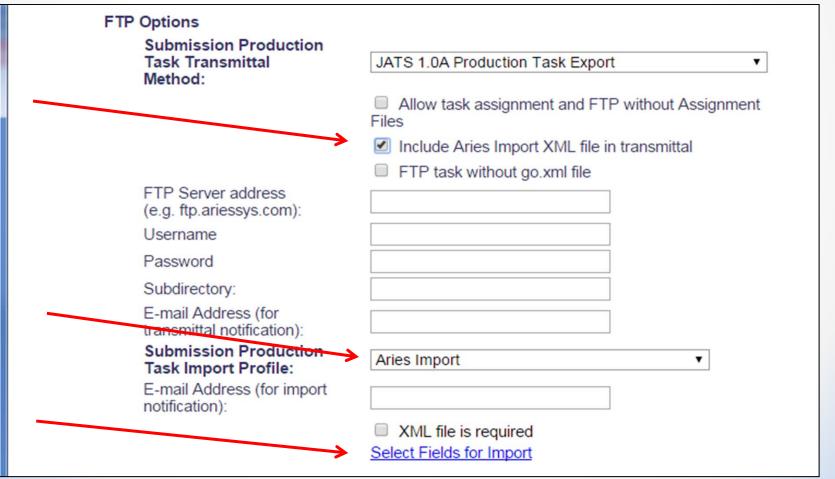
Companion File Options

- Show Warning if File not uploaded when Task is Submitted
- Allow assigned companion files to be replaced when submitting the task
- Limit the Submission Item Types that can be uploaded when Task is Submitted:

Only Item Types configured as Companion files appear in this list. 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 this task is configured with a Production Task Import Method, one and only one Item Type may be selected from this list. Companion files submitted via FTP for this kind of task will automatically be assigned this Item Type.

Copyedited manuscript	*
Corrected Proofs	
Formatted Manuscript	
Page Proois	
Profile	

• For task submitted via FTP, decide if metadata will be overwritten



Configure other tasks in workflow to be assigned automatically

- For the Copy Edit, Check Artwork, and Typesetting tasks, the setting 'Assign Automatically when previous task is completed' is renamed to 'Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)' in 12.0.
- This setting *must* be selected for automated assignment. If already selected in 11.2, no configuration change needed

Edit Subr	nission Production Task
	Cancel Submit
New Desidering Test News	Insert Special Character
New Production Task Name:	Copyedit Maximum Production Task Name is 100 characters
	Production Task Name, the Production Task Name not available for assignment).
Assignment Options	
	ons listed below. Because this process occurs automatically you must select a specific user to receive the task. You should also configure one or more task is not used to process files.
Assign Autom	natically when Production is initiated (if this is the first task in the workflow)
Assign Autom	natically when all Trigger Tasks are completed (if configured in the workflow)

Configure other tasks in workflow to be assigned automatically

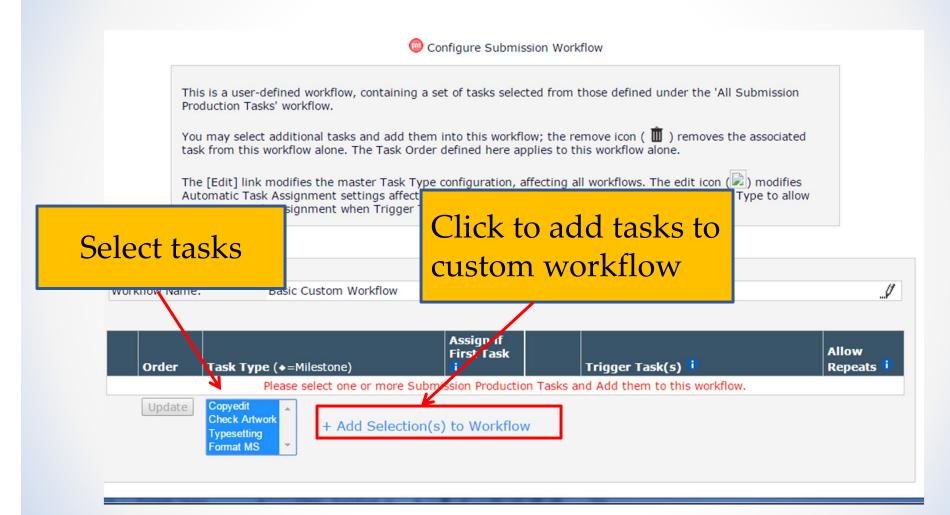
- **BUT WAIT!!!!** you promised to support more customized production task workflows! Where do we configure them?
- AND, what happened to this configuration option?
 - If task is *not* first in workflow, which task completion(s) trigger its assignment?
- AND, the trigger task(s) for Typesetting are different in the 2 different workflows! (Basic vs. Simple)
- *Hint*: (We haven't yet told the system which tasks are the "trigger tasks" for Copy Edit, Check Artwork, and Typesetting)

Adding New Custom Workflow

• Enter custom workflow name and click 'Add' to start building a new custom workflow

Configure Submission Workflows and Tasks
Listed below are previously created Submission Workflows, including the system-defined 'All Submission Production Tasks' workflow; edit this workflow to define new Task Types, or remove/hide unwanted ones.
You may Add, Edit or Remove your own Custom Workflows. All Workflows define a set of Submission Production tasks and the relationships between them, such as the order of Tasks and Trigger Task links for Automatic Assignment. To use any Workflow, it must be associated with the appropriate Article Types via the <i>Edit Article Types</i> page; Task Assignment for submissions of these Types is then limited to tasks in the Workflow.
Standard
All Submission Production Tasks Copy Edit
Custom Submission Workflows
No Custom Workflows have been defined.
Insert Special Character
New Custom Workflow Name: Basic Custom Workflow Add
Maximum Workflow Name is 100 characters

Adding new Custom Workflow



Set task order for this workflow

• Order is custom for this workflow; can be a different order for a different workflow!

		© Configure Submission Workflow					
	This is a user-defined workflow, containing a set of tasks selected from those defined under the 'All Submission Production Tasks' workflow. You may select additional tasks and add them into this workflow; the remove icon (💼) removes the associated task from this workflow alone. The Task Order defined here applies to this workflow alone. The [Edit] link modifies the master Task Type configuration, affecting all workflows. The edit icon (\checkmark) modifies Automatic Task Assignment settings affecting only this workflow (you must first configure the Task Type to allow Automatic Task Assignment when Trigger Tasks are submitted).						alone. The
Work	flow Nam	e: Basic Custom Workflow		Assign if First Task i		Trigger Task(s) i	/
Ŵ	1	Format MS [Edit]		√		118861 1834(3)	
ŵ	2	Copy Edit [Edit]			1		
Ŵ	3	Check Artwork [Edit]			1		
Ŵ	4	Typesetting [Edit]			1		
	Updat	Auto-assigned task Review Page Proofs Translation Technical Submission Check	+ Ac	dd Selection(s)	to Workfl	ow	
			Return t	o Configure Wo	rkflows ar	nd Tasks	

Things to Confirm

• Format MS has 'Assign if First Task' selected (i.e. will be automatically assigned at 'Initiate Production' for this workflow)

	Order	Task Type (✦=Milestone)	A sign if First Task i		Trigger Task(s) 🕕	Allow Repeats
Ĭ	1	Format MS [Edit]	✓			
đ	2	Copy Edit [Edit]		1		
Ŭ	3	Check Artwork [Edit]		1		
Ì	4	Typesetting [Edit]		1		
	Update	Auto-assigned task Review Page Proofs Translation Technical Submission Check	dd Selection(s)	to Work	flow	

Things to Confirm

- Copy Edit, Check Artwork and Typesetting all have 'pencil' icons available in the 'Trigger Task(s)' section
 - Clicking the pencil allows you to select trigger tasks for each

VVUI	flow Name:	Basic Custom Workflow				
	Order	Task Type (+=Milestone)	Assign if First Task i		Trigger Task(s) 🖡	Allow Repeat
Ŵ	1	Format MS [Edit]	1	 ♥		
Ŵ	2	Copy Edit [Edit]		1		
Ŵ	3	Check Artwork [Edit]		1		
Ŵ	4	Typesetting [Edit]		1		
	Update	Auto-assigned task Review Page Proofs Translation Technical Submission Check	+ Add Selection(s)	to Worl	kflow	

Set up trigger relationships for 'Copy Edit'

- Click pencil icon for 'Copy Edit'
- Select 'Format MS' and click the 'Save' icon

	Order	Task Type (♦=Milestone)	Assign if First Task <mark>i</mark>		Trigger Task(r, 1	Allow Repeats 🕫
	1	Format MS [Edit]	1			
Ì	2	Copy Edit [Edit]		₿ ♠	Format MS 💲	NoYes
T	3	Check Artwork [Edit]		1		
J	4	Typesetting [Edit]		1		

	Trigger	Task(s) 🕫
≝ ♠	Format	MS 🌲
 /		

Set up trigger relationships

 When configuring Check Artwork, 2 choices – Format MS and Copy Edit (both preceding tasks in workflow); we pick 'Format MS'

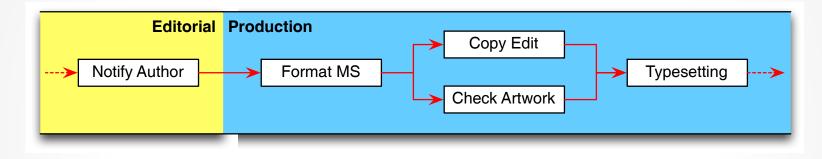
Order	Task Type (+=Milestone)	Assign if First Task ⁱ	Trigger Task(s) 🕫
1	Format MS [Edit]	✓	
2	Copy Edit [Edit]		Format MS
3	Check Artwork [Edit]	8	Format MS Copy Edit

Set up trigger relationships

 Typesetting – need to pick TWO trigger tasks, Copy Edit and Check Artwork

/or	kflow Nam	e: Basic Custom Workflow			
	Order	Task Type (+=Milestone)	Assign if First Task	Trig	ger Task(s) 🚺
Ŵ	1	Format MS [Edit]	✓		
Ŵ	2	Copy Edit [Edit]			nat MS
Ŵ	3	Check Artwork [Edit]		/ Eorn	nat MS
Ŵ	4	Typesetting [Edit]		Сор	nat MS y Edit ck Artwork
	Update	Styling Printing Reprint Order Send to Atypon	Add Sele	ction(s) to W	/orkflow

Basic Custom Workflow, configured



	Order	Task Type (♦=Milestone)	Assign if First Task i		Trigger Task(s) 🕫	Allow Repeats i
Ŵ	1	Format manuscript [Edit]	✓			
Ŵ	2	Copy Editing [Edit]		.I	Format manuscript	
Ŵ	3	Check Artwork [Edit]		.I	Format manuscript	
Ŵ	4	Typesetting [Edit]		l	Copy Editing; Check Artwork	

Simple Workflow, configured

Vork	flow Name:	Simple Workflow			
	Order	Task Type (+=Milestone)	Assign if First Task ⁱ		Trigger Task(s) ⁱ
Ŵ	1	Format MS [Edit]	✓		
Ŵ	2	Typesetting [Edit]		1	Format MS
Ŵ	3	Printing [Edit]		1	Typesetting
	Update	Styling Copy Edit Check Artwork Reprint Order	Add Selection(s) to W	/orkflow	

Short Aside #1 – Allow Repeats

• Select 'Allow Repeats' to cause task to be automatically reassigned each time trigger task completed.

	Order	Task Type (♦=Milestone)	Assign if First Task <mark>i</mark>		Trigger Task(s) 🤨	Allow Repeats 🕫
Ì	1	Create Proofs [Edit]				
Ì	2	Proof to Author [Edit]		8	Create Proofs	NoYes
	Order	Task Type (♦=Milestone)	Assign if First Task <mark>1</mark>		Trigger Task(s) 🕴	Allow Repeats
Û	1	Create Proofs [Edit]				
Û	2	Proof to Author [Edit]				

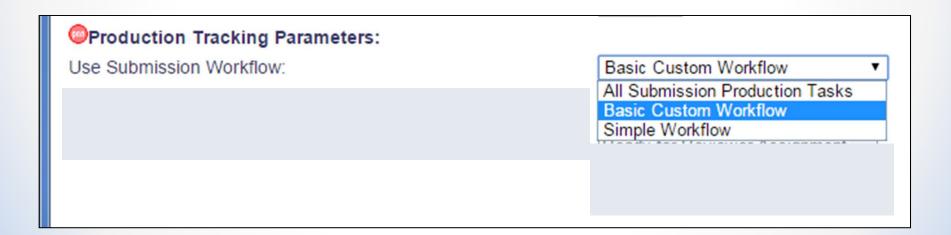
Short Aside #1 – Allow Repeats

- First time "Create Proofs" is submitted, both "Proof to Author" and "Proof to Editor" are triggered.
- When 'Create Proofs' is reassigned and resubmitted:
 - Author does not receive new proof (Allow Repeats=No).
 - Editor DOES receive new proof (Allow Repeats=Yes)

	Order	Task Type (♦=Milestone)	Assign if First Task <mark>i</mark>		Trigger Task(s) 🕫	Allow Repeats 🚺
Ì	1	Create Proofs [Edit]				
Ì	2	Proof to Author [Edit]		1	Create Proofs	
Ì	3	Proof to Editor [Edit]		1	Create Proofs	1

Link Workflow to Article Type(s)

- "All Submission Production Tasks" is the default production task workflow
- Once custom workflows are created, custom workflow can be selected per Article Type (Edit Article Type page)



Good News!

At 12.0 upgrade:

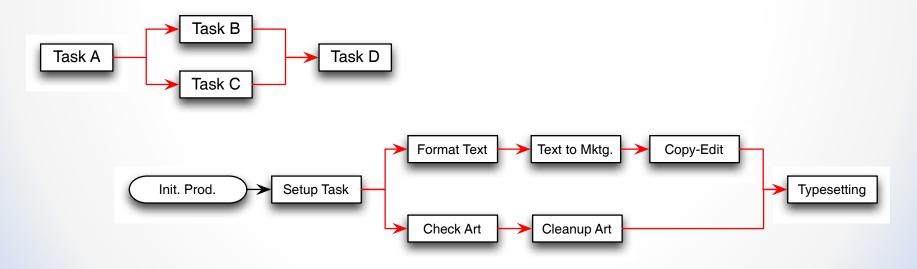
- Existing workflows (including All Submission Production Tasks workflow), are automatically configured!
 - *Including:* trigger task selection (if automatic assignment options already selected for tasks)
- No need to edit unless you want to change them!
- Article Types retain their workflow configuration selection

Short Aside #2 -Milestone Tasks

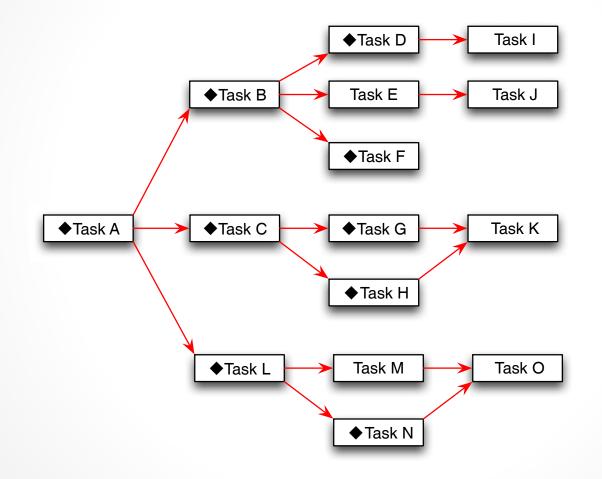
- Milestone Tasks are considered to be Assigned *and* Submitted in the same action
 - So the system checks whether other tasks should be automatically assigned when *assigning* Milestone tasks
 - Can trigger another milestone task, creating a milestone task 'chain'
- For new Trigger Task functionality, *assigning* a Milestone Task:
 - Can trigger multiple task Assignments
 - Will trigger task assignment if it's one of multiple trigger tasks, and no other task is open
 - Can still trigger other milestone tasks, creating the milestone task 'chain'

'Trigger Task' Assignment Recap

- Submitting one task can automatically assign several other tasks
- A Task can be configured with multiple Trigger tasks; the last assigned Trigger Task to complete will trigger the assignment



Don't go overboard in 12.0...



(Actual Aries Test case...)

Tips for Task Automation

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Vendor-Driven workflow

- Tasks can be completed via FTP; this can be used to trigger automatic task assignment
 - Depends on whether you want to triage incoming files
- FTP submission can also be used to update Submission/Schedule Group Metadata
 - Use this to automate metadata updates
 - Can include Additional Manuscript Details, plus some general fields

Optimize Assignment Files

- When Assigning a Task Automatically, the Assignment Files are selected by Item Type
- Multiple types can be selected for Assignment
- When Submitting a Task by FTP, all files returned are assigned the same Item Type
 - Configure these tasks so that files submitted by Task A are selected automatically as Assignment Files for any Tasks that it triggers
 (Applies to both 11.2 and 12.0 functionality)
 - o (Applies to both 11.2 and 12.0 functionality)

12.0: Trigger Task Configuration

- Don't have to create custom workflows can Edit 'All Submission Production Tasks' workflow and build new triggers for this workflow
 - As mentioned, existing 'next task' relationships are automatically ported to the new 'trigger task' configuration at upgrade

kflow Name	e: All Submission Product	ion Tasks		
Order	Task Type (♦=Milestone)	Assign if First Task ⁱ	Trigger Task(s) 🚺	Allow Repeats
1	Format manuscrint (Edit)	· · · · ·		
Ľ	▲Earring complete [Earl]	÷		
7	Typesetting [Edit]	B	Format manuscript Request Artwork from Author Due Date Test Task Copy Editing Pre-Proof to author Editing complete	⊙ No ○ Yes
8	Colour Imposition [Edit]			
9	Pren for Web [Edit]			

New! Workflows can be copied

Configure Submission Workflows and Tasks

Listed below are previously created Submission Workflows, including the system-defined 'All Submission Production Tasks' workflow; edit this workflow to define new Task Types, or remove/hide unwanted ones.

You may Add, Edit or Remove your own Custom Workflows. All Workflows define a set of Submission Production tasks and the relationships between them, such as the order of Tasks and Trigger Task links for Automatic Assignment. To use any Workflow, it must be associated with the appropriate Article Types via the *Edit Article Types* page; Task Assignment for submissions of these Types is then limited to tasks in the Workflow.

Standard	ſ		
All Submission Production Tasks		Сору	Edit
Custom Submission Workflows			
Basic Custom Workflow	Remove	Сору	Edit
Simple Workflow	Remove	Сору	Edit
	L L		

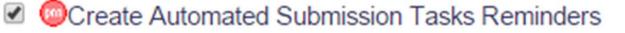
Automated Reminders for Production Tasks

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Automated Task Reminders

- Similar to existing Automated Reviewer and Author Revision reminders on Editorial
- For Submission Tasks and Schedule Group Tasks, (based on new RoleManager permissions)
- Editors/Publishers with suitable permissions can create any number of saved Automated Reminders
 - Each is picked up by a nightly batch process run on the EM/PM servers
- Reminders based on:
 - Days after task assignment
 - Days Before/After key dates (Due date, Target Publication Date – submission or Schedule Group)
 - Additional filters (by Article Type, task type, etc.)

New Editor and Publisher RoleManager Permissions



Create Automated Schedule Group Tasks Reminders

Automated Submission Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Submission Tasks reminder e-mails will be sent once every 24 hours to each recipient.

	Outstanding Submission Production Tasks: Send an automated reminder e-mail to users who were assigned a Submission Production Task 7 days ago. If users have already completed their task, they will not receive a reminder.
Reminder Type:	O Reminder Before Selected Date Type: Send an automated reminder e-mail to users whose open, assigned Submission Production Task is exactly 10 days before the selected date type.
	• Reminder Past Selected Date Type: Send an automated reminder e-mail to all users whose open,
	assigned Submission Production Task is exactly 1 days past the selected date type. To send reminders for tasks that are due on the day the reminder report is run, enter 0 days.
Date Type:	Production Task Due Date
Production Task:	(All Production Tasks)
Schedule Group:	(All Schedule Groups)
Reminder Name:	Insert Special Character General 1 day Chase
Reminder Letter:	Maximum 200 characters PT - General Reminder

Date Type:	Production Task Due Date
	Production Task Due Date Submission Target Online Publication Date Schedule Group Target Online Publication Date Schedule Group Target Publication Date

Automated Submission Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Submission Tasks reminder e-mails will be sent once every 24 hours to each recipient.

You may further refine your result set by selecting all, or choosing one or more values below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, the 'Command' key is used while using the mouse to click the desired items.

Assigned To:	Author Select All Art Editor (E) Image: Clear All Copy Editor (E) Image: Clear All
Article Type:	Original Article Select All Rapid communication Image: Clinical report Clinical report Image: Clinical report
Section/Category:	Research News and Views No Section Assigned Clear All

Save as Automated Reminder

Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them. Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the Drag & Drop tool.

There are currently no saved automated reminders.

Automated Submission Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Submission Tasks reminder e-mails will be sent once every 24 hours to each recipient.

Saved Automated Reminders

Click the 'Remove' tool if you want to permanently remove a saved reminder, and stop all automated reminder e-mails associated with it. Click the 'Edit' tool to edit the criteria saved for a saved reminder. Note: Reminders can only be removed or edited by the user who created them.

Re-order saved reminders by dragging and dropping the saved reminder record to the new location via the 'Drag & Drop' tool.

		Reminder Name	Reminder Type	Number of Days	Reminder Creator
Ŵ	<i>I</i>	Open Production Tasks Assigned 10 days ago	Outstanding Submission Production Tasks	10	Mary Smith, MD
		Submission Task Due in 10 days from SG Target Online Pub Date	Reminder Before Schedule Group Target Online Publication Date	10	Joe Sample, MD

Automated Schedule Group Tasks Reminder Reports

Create a new Automated Reminder by selecting criteria below and clicking the 'Save as Automated Reminder' button. Once saved, the Automated Schedule Group Tasks reminder e-mails will be sent once every 24 hours to each recipient.

	Outstanding Sche Schedule Group Product	tion Task 7 days ago. If users have already completed their task, they will not receive a reminder.	
Reminder Type:	Reminder Before S Production Task is exact	Selected Date Type: Send an automated reminder e-mail to users whose open, assigned Schedule Group ly 10 days before the selected date type.	
	Reminder Past Sel Group Production Task is the reminder report is run		
Date Type:	Schedule Group Production Task Due Date		
Production Task:	(All Production Tasks)		
Schedule Group:	(All Schedule Groups)		
	Insert Special Character		
Reminder Name:	Maximum 200 character	2°	
Reminder Letter:	Please Choose an A		
	r result set by selecting all, ing the mouse to select the	Schedule Group Production Task Due Date	
Assigned To:	Associate Editor Editor-in-Chief Managing Editor Publisher	Schedule Groups)	
Assigned To.		T Clear All	

Automatic Cancellation of Production Tasks when SG closed

 \bullet \bullet \bullet

Ending Production

 In 11.2, Production can End Automatically when a specific Submission Production Task Type is completed

o If no other tasks are open/assigned

• AND, Production can End for all submissions in Schedule Group when Schedule Group is closed, if no open tasks

Ending Production In 12.0 - new RoleManager permission 'Automatically Cancel Production Task Assignments when Closing 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

Closing Schedule Group

 Editors/Publishers with new permission can <u>Close Group</u> even if there are open Submission or SG Tasks ; tasks will be cancelled

Copy Group Close Group Assign Production Task Jul 2013 Batch Assign Submission Task Edit Group Details Production Status Grid History File Inventory Copy Group Close Group Assign Production Task Jul 2013 (C Batch Assign Submission Task Edit Group Details Production Status Grid

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

- · 4 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.
- 9 Schedule Group Production Tasks are 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.

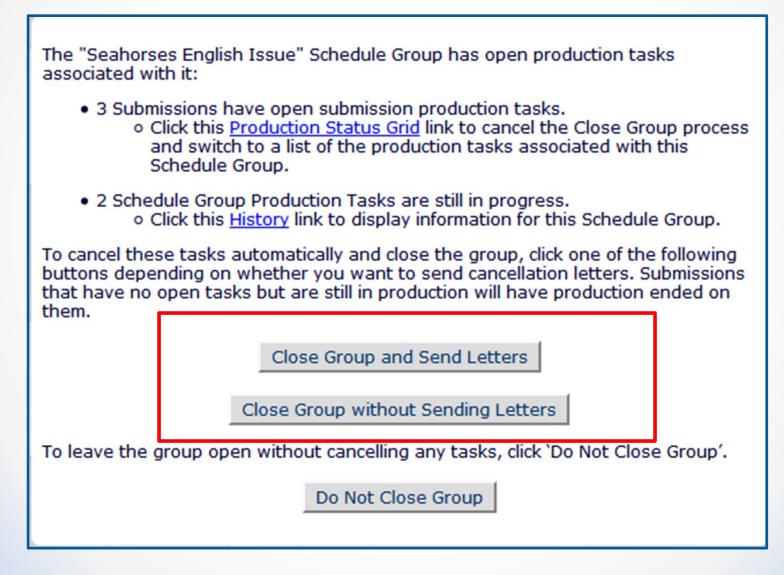
Close Group and Send Letters

Close Group without Sending Letters

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

Do Not Close Group

Can send task cancellation letters, or cancel tasks and close group without sending letters



Recap - Version 12.0 Enhancements

- Enhanced Submission Production Task Workflow options
- Automated Reminders for Production Tasks
- Automatic Cancellation of Production Tasks when Closing Schedule Group
- JATS Manuscript Import ProduXion Manager
- Imports initiating production can now trigger the first task in the workflow
 - Specific Import methods

Questions?

