# Preprint Manager: Production Tasks

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production Tasks Overview</td>
<td>4</td>
</tr>
<tr>
<td>Extended Publisher Roles</td>
<td>4</td>
</tr>
<tr>
<td>Production task assignments:</td>
<td>4</td>
</tr>
<tr>
<td>Workflow and Scheduling</td>
<td>5</td>
</tr>
<tr>
<td>“Volume and Issue” structure (Schedule Groups)</td>
<td>5</td>
</tr>
<tr>
<td>File management</td>
<td>6</td>
</tr>
<tr>
<td>How is Production Tracking used?</td>
<td>6</td>
</tr>
<tr>
<td>Configuration overview</td>
<td>6</td>
</tr>
<tr>
<td>Suppressing the Author Submission Interface</td>
<td>8</td>
</tr>
<tr>
<td>Defining Identifiers to Display</td>
<td>8</td>
</tr>
<tr>
<td>Defining Color Codes</td>
<td>10</td>
</tr>
<tr>
<td>Defining Companion Files</td>
<td>11</td>
</tr>
<tr>
<td>Production Tasks</td>
<td>12</td>
</tr>
<tr>
<td>General Options</td>
<td>15</td>
</tr>
<tr>
<td>Assignment Options</td>
<td>16</td>
</tr>
<tr>
<td>Companion File Options</td>
<td>17</td>
</tr>
<tr>
<td>Scheduling and Due Date Options</td>
<td>18</td>
</tr>
<tr>
<td>Letter Options</td>
<td>19</td>
</tr>
<tr>
<td>Scheduling</td>
<td>19</td>
</tr>
<tr>
<td>Production Status Terms</td>
<td>20</td>
</tr>
<tr>
<td>Editorial Manager Pages modified by Production Tasks</td>
<td>21</td>
</tr>
<tr>
<td>Details</td>
<td>21</td>
</tr>
<tr>
<td>History</td>
<td>21</td>
</tr>
<tr>
<td>File Inventory</td>
<td>23</td>
</tr>
<tr>
<td>Publish Information</td>
<td>24</td>
</tr>
<tr>
<td>Transmittal Form</td>
<td>25</td>
</tr>
<tr>
<td>Author Main Menu</td>
<td>26</td>
</tr>
<tr>
<td>Production Tasks Menu</td>
<td>27</td>
</tr>
<tr>
<td>Setting Production Task menu as default</td>
<td>28</td>
</tr>
<tr>
<td>Production Tasks Assigned to Me</td>
<td>29</td>
</tr>
<tr>
<td>Production Tasks I have Assigned</td>
<td>30</td>
</tr>
<tr>
<td>View All Submissions in Production</td>
<td>31</td>
</tr>
<tr>
<td>View All Production Tasks with Authors</td>
<td>32</td>
</tr>
<tr>
<td>Production Status Grid</td>
<td>32</td>
</tr>
<tr>
<td>Manage Schedule Groups</td>
<td>33</td>
</tr>
<tr>
<td>Add Schedule Group</td>
<td>34</td>
</tr>
<tr>
<td>Closed Schedule Groups</td>
<td>35</td>
</tr>
<tr>
<td>View All Submissions with Production Completed</td>
<td>35</td>
</tr>
<tr>
<td>Production Tasks Reminder Report</td>
<td>36</td>
</tr>
<tr>
<td>Search Submissions/Search People</td>
<td>38</td>
</tr>
<tr>
<td>New Viewing and Editing permissions</td>
<td>40</td>
</tr>
<tr>
<td>New Action Links</td>
<td>42</td>
</tr>
<tr>
<td>Assign Production Task (Initiate Production)</td>
<td>43</td>
</tr>
<tr>
<td>End Production</td>
<td>45</td>
</tr>
<tr>
<td>Topic</td>
<td>Page</td>
</tr>
<tr>
<td>------------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Return to Production</td>
<td>46</td>
</tr>
<tr>
<td>Add Schedule Group</td>
<td>47</td>
</tr>
<tr>
<td>Edit Group Details</td>
<td>48</td>
</tr>
<tr>
<td>Add Submission</td>
<td>49</td>
</tr>
<tr>
<td>Remove From Group</td>
<td>50</td>
</tr>
<tr>
<td>Close Group</td>
<td>51</td>
</tr>
<tr>
<td>Assign Production Task/Assign Another Production Task</td>
<td>51</td>
</tr>
<tr>
<td>Assign Follow-On Task</td>
<td>54</td>
</tr>
<tr>
<td>Cancel Assignment</td>
<td>55</td>
</tr>
<tr>
<td>View Assignment Letter</td>
<td>55</td>
</tr>
<tr>
<td>View instructions (authors only)</td>
<td>56</td>
</tr>
<tr>
<td>Assignment Files</td>
<td>56</td>
</tr>
<tr>
<td>Submit Task</td>
<td>57</td>
</tr>
<tr>
<td>Production Details</td>
<td>59</td>
</tr>
<tr>
<td>History</td>
<td>60</td>
</tr>
<tr>
<td>Transmittal Form</td>
<td>61</td>
</tr>
<tr>
<td>File Inventory</td>
<td>61</td>
</tr>
<tr>
<td>Zip file download</td>
<td>62</td>
</tr>
<tr>
<td>Production Status Grid</td>
<td>62</td>
</tr>
<tr>
<td>Corresponding Production Editor</td>
<td>63</td>
</tr>
<tr>
<td>Mail-merge Fields for Production Tracking</td>
<td>65</td>
</tr>
<tr>
<td>Useful 5.0 Features</td>
<td>66</td>
</tr>
<tr>
<td>Customized Flags</td>
<td>67</td>
</tr>
<tr>
<td>Additional Manuscript Details</td>
<td>67</td>
</tr>
<tr>
<td>Example: Configuring a Copy-Editing stage before Transmittal</td>
<td>68</td>
</tr>
<tr>
<td>Configuration</td>
<td>68</td>
</tr>
<tr>
<td>Use</td>
<td>69</td>
</tr>
</tbody>
</table>
Production Tasks Overview

This 5.0 release of Editorial Manager and Preprint Manager introduces a set of features that allows journals to manage journal activities that are not directly related to peer-review. For most journals these will be “production”-related activities such as typesetting or proof reading. However, any activity outside the main peer-review workflow could be managed using a “production” task.

For example, journals that carry out copy-editing prior to acceptance and release to their publisher could use a Production Task to manage the assignment of the submission to a freelance copy-editor, who can then can pick up and return files through the system before transmittal to the publisher. Journals that control their own preparation for publication can extend this to the entire post-acceptance workflow, assigning and tracking all stages through to publication.

Production Tasks are part of the Pre-Print Manager system and are not automatically available to all Editorial Manager users. You will need to contact your Editorial Manager representative to make these features available.

Extended Publisher Roles

New Publisher and Editor permissions have been added to control who can view Production Task-related information. The Publisher roles, in particular, have been given many more permissions in anticipation of their greater use in journals configured to carry out Production Tracking.

You can use Publisher roles for people who have no need to interact with the Peer-Review process; otherwise Editor Roles can be used for people who work on both. You’ll need to have at least one normal Editor Role configured to Initiate Production, as this is done from the main Editorial Menu.

Production task assignments:

These are central to setting up a production workflow, and you can track any process you carry out as a Production Task. A production task is similar to a reviewer or editor assignment, and it:

- Allows you to assign a submission to a person to work on; they usually describe processes like “Copy-editing”, “Typesetting” and “Proof-Checking”.
- Allows you to set (and will automatically calculate) due dates for each process; they can be linked to target publication dates.
- Allows you to control who can carry out each task.
- Allows you to make selected files available as part of the assignment.
• Allows the recipient to upload new files through the Editorial Manager/PM system.

• Automatically records the dates for each activity.

A production task is a simple assignment; there are no options to invite a person, although production tasks can be cancelled easily once assigned.

**Follow-on Assignments:** Some tasks can be configured to allow “Follow-On” assignments. When a recipient closes such a task, they are given the option of immediately assigning another task. This allows you to ask a third-party to assign work using the system, or to “daisy-chain” tasks together.

**Workflow and Scheduling**

PM provides a spreadsheet-like Status Grid view of key tasks, so you can track the progress of submissions through the workflow.

Individual tasks can be given a target duration, and their due date can also be linked to publication dates.

**Target Publication Dates:** each submission can have up to three target publication dates:

• A submission-specific target online publication date; this is independent of any issue/schedule group target publication dates, and can be used to bring an important submission forward ahead of the rest of its schedule group.

• A target online publication date from an associated schedule group; this is the target online date for all submissions in the group.

• A target publication date for the schedule group, normally the print publication date. This is to define a target date for all submissions in the group.

Using these three dates, you can set a target date for printing an issue, set an earlier target date for putting all submissions in the issue online, and if necessary give individual submissions an even earlier target online date, for example to meet a conference date or to ensure the earliest possible publication date.

**“Volume and Issue” structure (Schedule Groups)**

Submissions can be assigned to Schedule Groups (normally individual Issues) to:

• Define key publication dates.

• Define running order/Tables of Contents.

• Maintain targets for content (number of pages, figures, etc.).

A submission can belong to only one schedule group at a time, but can be moved freely between groups.
**File management**

Production Tasks allow you to assign specific files to people as part of the task assignments. When each person completes their assignments, they can upload files as part of the submission process.

**Companion Files:** Files associated with Production Tasks are designated Companion files and don’t appear in the main submission PDF.

**Color Coding:** You can use special color-codes to manage your companion files; assigning a default color code allows you to immediately assign companion files to a specific group. Or, you can use color-coding to indicate progress (e.g. change a file’s color from Red, through Yellow to Green as you process it).

**Hiding:** You can Hide old companion files as they are replaced with new ones, allowing you to maintain a current set of live files and simplifying your file management.

**How is Production Tracking used?**

Assignments are made for individual submissions, with schedule groups being used to manage groups of submissions for scheduling purposes. Typically, you will:

Initiate production on individual submissions at any time, even before decision or final disposition if you wish.

Use the Production Status Grid to review the progress of submissions through the production process.

Set up Schedule Groups for specific issues, or for other scheduled deliverables, such as conference proceedings or a monthly web site update.

Set individual online Target Publication Dates for a submission, or assign a submission to a Schedule Group to inherit target dates from the group.

Assign Production Tasks to process the submission, selecting files for the recipient to work on.

People you assign tasks to will receive notifications, download assignment files from Preprint Manager, and when complete, submit their tasks, uploading any new files as they do so.

Use the Production Status Report to chase up outstanding tasks.

Move completed submissions out of production, either individually or by closing the schedule group.

**Configuration overview**

1) Ask your Editorial Manager/Preprint Manager representative to enable Production Tasks for your journal.
2) Configure the relevant editor and publisher roles in RoleManager, adding new roles for your production staff and external suppliers or freelances. Identify:
   • Who can see Production Task-related information.
   • Who is eligible to assign and receive Production Tasks.
   • Which roles will default to using the Production Task menu.

3) Decide whether to suppress the normal author submission interface; only applicable to journals that do not use Editorial Manager for peer-review tracking.

4) Select the identifiers to be displayed in Production Tracking columns, selecting from MS Number (carried over from Editorial Manager), DOI, Corresponding Author name and Article Title.

5) Define file policies:
   • Define Color Codes for companion files.
   • Create companion file Submission Item Types in PolicyManager, assigning default color codes if required.

6) Create letters for each production task, and production task reminder letters. For each task you may need:
   • An Assignment letter to the person carrying out the task, on initial assignment
   • A Cancellation letter to the person carrying out the task assignment.
   • A Submit Task letter to the journal, sent on completion of the task assignment.

7) Define Production Tasks for each stage in your workflow, setting:
   • Assignment policies (who can assign and receive the task; if follow-on tasks are allowed).
   • Scheduling policies (does the task appear in the Status Grid, task duration and lead times before publication).
   • Upload policies (what types of file can be uploaded).
   • Letters sent (on assignment, cancellation and completion).

8) Add initial schedule groups (volumes and issues) to the system before transferring submissions to production
Detailed Feature List and Configuration

**Suppressing the Author Submission Interface**

Existing Editorial Manager users are not likely to require this option; it is only necessary where a journal is using only the Production Tracking features in Preprint Manager, and wishes to log submissions centrally without authors creating and submitting unsolicited manuscripts.

With this option set, all folders related to the normal Editorial Manager peer-review management are removed, leaving only the “Current Task Assignments” and “Completed Production Task Assignments” folders available to authors.

TO CONFIGURE: Go to RoleManager, and edit the Author role. Set the “Hide Manuscript Submission Interface” permission.

**Defining Identifiers to Display**

Preprint Manager allows you to simplify some of the Production Tracking pages that list submissions by selecting the main identifiers to use to identify the submission information. You can select from:

- Manuscript Number (carried over from Editorial Manager)
- DOI
- Article Title
- Corresponding Author Name

Note that the corresponding Author Name will display with the author’s country in brackets, to allow you to add extra time for Production Tasks assigned to them if necessary.

**PolicyManager Main Menu**

```
- Registration and Login Policies
- Status Policies
- Submission Policies
- Additional Data Policies
- Editor Assignment Policies
- Reviewer and Editor Form Policies
- E-mail and Letter Policies
- General Policies
- Conference Submission Policies
- Transmittal Policies
- Preprint Manager
  - Configure Author Quality Checking
  - Configure Production Tasks
  - Configure Identifiers Displayed in Production Tracking
  - Configure Reference Checking
```

TO CONFIGURE: Use PolicyManager, Configure Identifiers Displayed in Production Tracking. Tick/check the selection boxes by the identifiers you wish to display in Production Tracking pages.
Defining Color Codes

You can create custom color-coding to apply to Companion Files uploaded by the author during submission, by editors through the File Inventory page, or whenever a user completes a Production Task assignment.

There are two main ways to use the codes:

- Simply define a set of codes, and manually change each Companion File in the File Inventory or when submitting a task.

- Define a set of codes, and also specify a default code for each submission item type – note that color-coding can only be applied to Companion Files, not normal submission files.

You can combine both approaches – for example, using a Red (=Unchecked) color code for all files on upload, changing this manually to Green as each file is checked.

TO CONFIGURE: First, you need to define a set of color codes to use. Use PolicyManager, Configure Color Codes for Companion Files. Each color code requires a color to be selected, plus a description to display when you hover the cursor over the code.
Once you have a set of codes, they can be assigned manually to individual files through the File Inventory using the Change Color Code link.

Give anyone who needs to change Color Codes the Upload, Hide and Restore Companion files using RoleManager.

You can also set a default color to be used whenever a specific type of Companion File is uploaded.

**Defining Companion Files**

Before you can use Production Tracking, you must create one or more Submission Items to act as Companion Files. In effect, each submission has two different pools of files...
associated with it – the submission files originally submitted by the author for peer-review, and the Companion Files used specifically for production.

Note that you can configure the system so that an author can upload a Companion File, but Companion Files are never built into the PDF approved by the author, or the PDF that is sent for peer-review. Any type of file that needs to be peer-reviewed should not be configured as a Companion File.

Companion Files are controlled through the PDF Handling setting for submission file types.

TO CONFIGURE: Use PolicyManager, Edit Submission Items. To define a submission Item as a Companion File, set the PDF Handling to “Companion File (not built into PDF)”.

Optionally, choose a default color code. When a file of this type is initially uploaded, the color code for that file will be set to this value.

Production Tasks

Production Tasks allow you to follow any production workflow you wish, from a single copy-editing step through to a more complex series of tasks. Each production task has several key configuration areas to allow you to:

- Limit who can assign the task, and who can receive it.
• Say whether you expect files to be returned on completion of the task, and define what kinds of files can be uploaded.

• Define the scheduling of the task: its duration, how long before publication it needs to finish, and whether you wish to track this task in the main Production Status Grid.

• Permit follow-on assignments after completion of this task, to string sequences of tasks together.

• Define any instructions and assignment, cancellation and completion notification letters.

You will need to take some time to analyze your workflow, breaking it down into a list of potential tasks before creating these in Preprint Manager. In general, you should create a task:

• To process submission files. This is the most common type of task, for example “Typesetting”, “Copy-editing” “Correct Artwork”.

• To make files available to someone, for example “Proof-Reading by Author” or “Check-Out Art files”.

• To request information or files from someone, for example “Request for Updated Artwork”.

• To indicate you have reached a key date, for example “Copy Complete”. This would be denoted by a special “Milestone” task.

TO CONFIGURE: Use PolicyManager, Configure Production Tasks.

<table>
<thead>
<tr>
<th>Order</th>
<th>Production Task Name</th>
<th>Role</th>
<th>Family</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Format manuscript</td>
<td>Editor</td>
<td>Publisher</td>
</tr>
<tr>
<td>2</td>
<td>Request Artwork from Author</td>
<td>Author</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Copy Editing</td>
<td>Editor</td>
<td>Publisher</td>
</tr>
<tr>
<td>4</td>
<td>Pre-Proof to author</td>
<td>Author</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Typesetting</td>
<td>Editor</td>
<td>Publisher</td>
</tr>
</tbody>
</table>

This displays a list of currently configured Production Tasks. To remove a task from the list, you can click the Remove link.
Configure Production Tasks

Listed below are previously created Production Tasks. You may Add, Edit or Remove Production Tasks. Production Tasks may be hidden by clicking the "Edit" link and selecting the "Hide" check box on that page.

Order | Production Task Name | Role Family
--- | --- | ---
1 | copyedit | Editor/Publisher
2 | copyedit | Editor/Publisher
3 | copyedit | Editor/Publisher

If the Remove Box does not appear, you will need to Edit and Hide the task.

Edit Production Task

New Production Task Name: copyedit

Maximum Production Task Name is 100 characters

Add

To add a task, type a name into the “New Production Task Name:” field and click the “Add” button to display the main Add/Edit Production Task page. You can click Edit by an existing task to modify it.
The order in which the tasks are listed is important, as this defines the order in which they will appear across the Production Status Grid. You should order the tasks so that they consecutively reflect your current workflow.

Task ordering is the main way to define a “workflow”, in that earlier tasks appear higher in the list of assignments, and to the left in status grids. You can also add a greater degree of control by using follow-on task assignments, and limiting the types of task each role can assign. However, Preprint Manager will allow you to reassign earlier tasks or assign tasks out of order, as this allows for the greatest flexibility in daily use.

The order in which the tasks are listed is important, as this defines the order in which they will appear across the Production Status Grid. You should order the tasks so that they consecutively reflect your current workflow.

Task ordering is the main way to define a “workflow”, in that earlier tasks appear higher in the list of assignments, and to the left in status grids. You can also add a greater degree of control by using follow-on task assignments, and limiting the types of task each role can assign. However, Preprint Manager will allow you to reassign earlier tasks or assign tasks out of order, as this allows for the greatest flexibility in daily use.

The Edit Production Task screen allows you to set the following options:

**General Options**

- **New Production Task Name**: Defines the name for the task, shown in status grids and to the recipient of the task. We recommend you do not use the “X sent to Y” format, instead describe the process using “-ing” words, e.g. use “Typesetting”, not “Manuscript to Typesetter”.

Confidential – Subject to change – Copyright © 2006, Aries Systems Corporation
NOT FOR USE OUTSIDE OF ARIES
• **Hide.** Use this to remove a task from the active list. It can be reinstated at a later date by Editing and clearing this setting.

### Assignment Options

- **Production Task Custom Instructions:** Type instructions to the person completing the task here. You should identify the core purpose of the task, provide any checklists to the recipient, and tell them how to complete the task and what files they should upload to you.
• **Can be Assigned by:** Allows you to define which roles can be allowed to assign the task. For example, you might allow a “Typesetter” to assign an “Author Proof Correction” task, but that is likely to be the only type of task they are allowed to assign.

• **Can be Assigned to:** has two main settings: **Corresponding Author only**, which automatically sends the submission to the author, for example for “Author proofing” tasks; and **Selected Editor/Publisher Roles only:** which defines what types of people can carry out the task, for example “Typesetting” is likely only to be assigned to someone with a role of “Typesetter”.

• **Allow follow-on Task Assignments** if checked, this presents the assignee with an additional “Assign Follow-On Production Task” page from where they can assign one or more additional tasks. Note that you need to make sure that the roles which **this** production task can be assigned to must be able to assign at least one type of Production Task for this to be useful.

**Companion File Options**

• **Show Warning if File not uploaded when Task is Submitted** should be used for any production task for which you expect new files to be returned to the journal, for example “Typesetting” would normally require several versions of the typeset manuscript (e.g. XML version, PDF proof version).

• **Limit the Submission Item Types that can be uploaded when Task is Submitted:** allows you to define the types of file that the assignee can return, to simplify the upload process.

**NOTE:** You will need to create the Item types before you can select them here, using PolicyManager, Edit Submission Items. Only companion files will be available for selection (items designated as “Companion File (Not built into PDF)” in the “PDF Handling”)

Confidential – Subject to change – Copyright © 2006, Aries Systems Corporation

NOT FOR USE OUTSIDE OF ARIES
Scheduling and Due Date Options

- **Show Task in Production Status Grid** allows you to designate key tasks that will appear in the Production Status Grid. Unless your workflow is very simple, you should not display every possible production task in the Status Grid. For example, if a task is assigned very rarely, it should not appear in the grid, as it will not provide useful information on most submissions. If you have several processes that often occur together, such as “Sub Editing” and “Check Artwork”, you should consider only showing one of these tasks in the grid – probably Sub-Editing, as not all submissions will have artwork to check.

- **Task is a Milestone Task (no due date required):** this allows you to create a Production task which records a significant date purely for display on the Status Grid. It can also be used to trigger a notification to a selected person.

```
Scheduling and Due Date Options

Show Task in Production Status Grid

Task is a Milestone Task (no due date required)
- Calculate a Due Date based on:
  - Number of Days after Assignment Date:
  - Number of Days prior to Submission Target Online Publication Date:
  - Number of Days prior to Schedule Group Target Online Publication Date:
  - Number of Days prior to Schedule Group Target Publication Date:
```

- **Calculate a Due Date based on:** settings. When you assign a production task, Preprint Manager will calculate the due date based on these settings. You can select any combination of these settings, including no settings at all, and Preprint Manager will take the earliest possible, valid date for the Due date. For most tasks, you will select the “Calculate a Due Date based on: Number of Days after Assignment Date:” option and enter a number of days for the maximum time the task should take. For submissions on the Production Status Grid, you are likely to select one or more of the remaining options:

  - Calculate a Due Date based on: Number of Days after Assignment Date:
  - Calculate a Due Date based on: Number of Days prior to Submission Target Online Publication Date:
  - Calculate a Due Date based on: Number of Days prior to Schedule Group Target Online Publication Date:
  - Calculate a Due Date based on: Number of Days prior to Schedule Group Target Publication Date:
**Letter Options**

These select the template to use for the standard letters sent when assigning, cancelling or submitting (completing) a task. In each case users will be able to edit the letter before it is sent.

<table>
<thead>
<tr>
<th>Letter Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Letter: PT - General Assignment</td>
</tr>
<tr>
<td>Cancel Assignment Letter: Please Choose a Letter</td>
</tr>
<tr>
<td>Submit Task Letter: PT - Copy-Editing complete</td>
</tr>
</tbody>
</table>

There are three standard letters associated with each Production Task:

- **Assignment Letter:** Sent to the person who the task is being assigned to, this should contain instructions on logging in, obtaining the files, and where to go when the recipient has completed their task.

- **Cancel Assignment Letter:** Sent to the person who the task was assigned to, this should let them know that the assignment will no longer appear in their list of assigned tasks.

- **Submit Task Letter:** Sent to the person who assigned the task; this should be a brief notification that the task has been completed, and a reminder to go in and assign the next task, if appropriate.

**Scheduling**

When you assign a Production Task, PrePrint Manager can be configured to calculate the due date as outlined above. There are three possible dates that can be used for scheduling:

- **A Submission Target Online Publication Date.** This is manually set for each submission, using the Production Details page. This date is specific to the submission alone, and is not overridden when the submission is assigned to a Schedule Group. It allows you to identify an earlier target date for individual submissions, even if they are assigned to an issue or other Schedule Group.

- **A Schedule Group Target Online Publication Date.** This is inherited from the Schedule Group when a submission is assigned to it.

- **A Schedule Group Target Publication Date.** This is the print publication date, and is inherited from a Schedule Group when a submission is assigned to it.

Preprint Manager assumes that a submission that will be published in print will be assigned to an issue to do so, and that the Schedule Group Target Publication Date will be the anticipated date of print publication.
However, it also assumes that you might wish to put an issue on-line as a whole before the print version is released, and so the Schedule Group Target Online Publication date is the anticipated date that this will happen.

In addition, Preprint Manager is designed so that individual submissions can be given a special “ahead of print” publication date, normally an on-line release, handled by the individual submission’s Submission Target Online Publication Date.

Schedule Group Target dates can be modified from the “Manage Schedule Group” folder, by user’s with the Manage Schedule Groups permission.

TO CONFIGURE: Use PolicyManager, Configure Production Tasks. For any specific tasks, set the Calculate a Due Date based on: settings to select the target dates to be used in any due date calculations.

If the task has no duration, either uncheck all settings, or set the task to be a Milestone task.

If you do not use forward scheduling, or the task is not on the “critical path”, but should be completed within a set time, select only the “Calculate a Due Date based on: Number of Days after Assignment Date:” option, and enter a default timescale.

If the task is on the main critical path, and must be completed by a certain deadline, you may select Number of Days prior to Submission Target Online Publication Date, Number of Days prior to Schedule Group Target Online Publication Date, or Number of Days prior to Schedule Group Target Publication Date and fill in the appropriate number in the box.

Production Status Terms

There are four new “Production Status” terms introduced; these are displayed on the “Details” and “Production Details” pages. They are:

- Not in Production
- In Production
- Production Completed
- Returned to Production

Unlike the peer-review statuses, these are not editable by the user, and are not intended to give a detailed summary of progress through production. You should use the Production Status Grid to review the current status of submissions in production.

TO CONFIGURE: No configuration is possible; these are terms generated by the system.
Editorial Manager Pages modified by Production Tasks

Details

The “Production Notes” field can be displayed on this page for editors who do not have access to the “Production Details” link, but who need to review production notes.

A new “Production Status:” section has been added. If a submission is not yet in production, this displays an “Assign Production Task” link.

Once the first Production Task has been assigned and the submission is in production, this will display the current Production Status for the submission.

TO CONFIGURE: No configuration is required to display the “Production Status” section; it will appear automatically once Production Tasks has been activated for your journal. To allow a user to view the “Production Notes” field, use RoleManager to enable the permissions “View Production Notes on Manuscript Details” and “Edit Production Notes on Manuscript Details” for the desired Editor or Publisher role(s).

History

Two new sections are added to the standard History view, and their display is controlled by new RoleManager permissions:
• **Production Status History.** This displays a table of all production task assignments and their current status; you can use this to assess how far the submission has progressed.

• **Production Correspondence History.** This displays all Production Task-related letters generated for the current submission.

You may switch between a Status Type view, which separates Production Correspondence from normal correspondence and a Timeline View, which combines these into a single set of correspondence organized by date. The example shows the Status Type view, with a link to Switch to Timeline View.

```
TO CONFIGURE: To allow a user to view the new sections, use RoleManager, and edit the desired Editor or Publisher role. Set the permissions “View Production Status History” and “View Production Correspondence History”.

NOTE: The existing Editorial Manager permissions “View Status History” and “View Correspondence History” have been renamed “View Editorial Status History” and “View Editorial Correspondence History”, respectively.
```
File Inventory

The current “Download Files” link has been renamed “File Inventory” and can be configured to show both Submission files and the new production-task related Companion Files.
TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set either of the permissions “Download Companion Files” or “Upload and Remove Companion files”.

Publish Information

A new target date, the “Submission Target Online Publication Date” has been added to the Actual Publication Dates.

The layout of this page changes if the submissions is assigned to a Schedule Group after production has been initiated, to show two columns: Target and Actual Publication Data. For Commentaries, the Target data will initially show the information entered when requesting the commentary. For all other submissions, the Target date will show information entered during the production process, either manually for the submission, or inherited from an assigned Schedule Group.
TO CONFIGURE: No configuration is necessary.

Transmittal Form

The transmittal form layout is unchanged. Any Companion files uploaded before the Final Disposition is set to “Accept” will automatically appear on the transmittal form; you will need to manually de-select them to avoid their being sent to the publisher.
Two new folders have been added to the main menu for authors. These will only appear once the first Production Task has been assigned to the author.

- **Current Task Assignments** lists all production tasks assigned to this author. Authors must use this folder to complete production tasks and upload any files to the journal.

- **Completed Production Task Assignments** lists all production tasks that this author has completed. The author can use this to review the progress of the submission, and any covering letter sent at the time of assignment.

**Author Main Menu**

TO CONFIGURE: No configuration is necessary; once a production task has been assigned, the folders will appear. You can, however, decide to configure the system so
that *only* these two folders will appear, as described in the Suppressing Author Submissions section above.

**Note:** you will need to have at least one Production Task configured with “Can be Assigned to:” set to “Corresponding Author Only”. If you don’t, you can’t ask the author to complete a task for you.

**Production Tasks Menu**

Editors and Publishers with access to production task permissions will see a new “Production Tasks” menu tab on their main page.

TO CONFIGURE: To enable the production tasks features, you must contact your Editorial Manager representative to activate this Preprint Manager feature. Once this has been enabled, you must use RoleManager to enable one or more of the Production Task-related permissions.

Several key permissions define which links will appear in the Production Tasks menu:

- **View All Submissions in Production**: Shows the View All Submissions in Production and View All Production Tasks with Authors folders. Also affects the options available when viewing the Production Status Grid.

- **View Production Status Grid**: Shows the Production Status Grid from the main menu, plus additional links from each production tracking page.

- **Manage Schedule Groups**: Shows the links to the Manage Schedule Groups and Closed Schedule Groups; also shows the Add Schedule Group link, which does not link to a folder but allows you to set up a new Schedule Group.
• Send Production Reminders: Shows the link to the main Production Reminder report, to allow you to list overdue production tasks, and send chase emails.

• Assign Production tasks: Once you have used this to assign at least one production task, you will see the Production Tasks I Have Assigned” folder.

• Receive Production tasks: Shows the Production Tasks Assigned to Me folder, listing all Production Tasks you have yet to complete.

### Setting Production Task menu as default

You can also make this the default menu for users who will deal mainly or exclusively with production tasks, and who do not need to work with the main editorial menu. Links to the main editorial menu will remain on each production task page, so this will not prevent access to this.

TO CONFIGURE: Use Search People to locate the user, and then click on their name to edit their settings. Locate the “Default Login Menu” option and set to “Production Menu”.
Production Tasks Assigned to Me

This folder shows the currently logged-in user any Production Tasks that have been assigned to them to work on. Use this folder to:

- Review your task lists and due dates
- Download any files made available to you as part of a specific task.
- Submit a task (complete the task, optionally uploading files to the journal in the process).

You may also carry out additional actions, such as assigning other tasks or viewing Production Details depending on your permissions.

There are two views available for this folder. The folder will initially list all individual assignments, and you may see a particular submission more than once if you have more than one assignment related to it. If you have the permission to view the Production
Status Grid view, the Switch to Status Grid View link will show all submissions in the Status Grid view; this provides a table of submissions and assigned tasks to allow you to check the current status of all related submissions.

TO CONFIGURE: Enable the RoleManager permission **Receive Production Task** to display this link for any role that will work on production tasks. You must also configure at least one Production Task so that it can be assigned to users with that role. Make sure you have assigned the role to at least one user. Enable the **View Production Status Grid** permission to allow users to switch to the “Status Grid” view, but note this will give them access to details of all assignments on a submission.

### Production Tasks I have Assigned

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Author Name</th>
<th>Article Title</th>
<th>Production Task</th>
<th>Assigned To</th>
<th>Date Task Assigned</th>
<th>Date Task Due</th>
<th>Days until Due</th>
<th>Schedule</th>
<th>Section</th>
<th>Category</th>
<th>Article Type</th>
<th>Status Grid</th>
<th>Invoice Status</th>
<th>Invoice Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel Assignment</td>
<td>30Y2Z-03-0000076</td>
<td>John Macdonald</td>
<td>UNITED STATES</td>
<td>Copy Editing</td>
<td>John The Editor</td>
<td>Apr 25, 2016</td>
<td>Apr 29, 2016</td>
<td>36 days</td>
<td>December</td>
<td>June 2006</td>
<td>Article</td>
<td>Original Article</td>
<td>Jan 21, 2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancel Assignment</td>
<td>30Y228</td>
<td>Jane Author</td>
<td>UNITED STATES</td>
<td>Test Reviewer</td>
<td>Jane Author</td>
<td>Mar 21, 2016</td>
<td>30 days</td>
<td>March</td>
<td>Next</td>
<td>Next</td>
<td>Editorial</td>
<td>Original Article</td>
<td>Mar 21, 2016</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This folder shows the currently logged-in user details of any Production Tasks they have assigned on to someone else to work on. Use this folder to:

- Cancel a Production Task assignment, and send a notification to the assignee that this has happened.

You may also carry out additional actions, such as assigning other tasks or viewing Production Details depending on your permissions.

TO CONFIGURE: Enable the RoleManager permission **Assign Production Task** to display this link for any role that will assign tasks to other users. You must also configure at least one Production Task so that it can be assigned by users with that role. Make sure you have assigned the role to at least one user.
**View All Submissions in Production**

This folder lists all submissions with the statuses “In Production” or “Returned to Production”, i.e. which are available for production tasks. Use this folder for a quick overview of submissions in production, as you can sort this table by any column.

You can access general Production Task-related information and carry out key Actions from this view:

- Assign Production Tasks
- End Production

TO CONFIGURE: Enable the RoleManager permission **View All Submissions in Production**. The Action Links that appear will depend on which other Preprint Manager permissions are enabled. Note that the Schedule Group name listed in the main table of submissions will appear as a link to the details of the Schedule Group if a user has either of the permissions “View Schedule Groups” or “Manage Schedule Groups” set.
View All Production Tasks with Authors

This folder lists all tasks that have been assigned to an author, whoever originally assigned them. Use this folder to:

- Cancel a Production Task assignment and send a notification to the author.

You may also carry out additional actions, such as assigning other tasks or viewing Production Details depending on your permissions.

TO CONFIGURE: Enable the RoleManager permission View All Submissions in Production.

Production Status Grid

Use this folder to review the progress of all submissions through the production process. It displays the status of key Production Tasks for listed submissions.
The key feature of this page is the list of Production Tasks listed across the grid, between the Date Production Started and Submission Target Online Publication Dates. You can choose the key Production Tasks that appear in this grid.

By initially listing all submissions In Production, the can be further filtered to present:

- Submissions not currently assigned to a Schedule Group.
- All submissions assigned to any schedule group
- Submissions assigned to a specific Schedule Group.

You can access general Production Task-related information and carry out key Actions from this view:

- Assign Production Tasks
- End Production

TO CONFIGURE: Only specified tasks will appear on the grid. To select a task for the Status Grid, go to PolicyManager and click the “Configure Production Tasks” link under the Preprint Manager section heading. Select and Edit a Production Task, then set the Show Task in Production Status Grid permission to have the task appear in the grid.

To allow users with a particular role to view the grid enable the RoleManager permission View Production Status Grid.

### Manage Schedule Groups

This folder lists all Schedule Groups that are currently active. A Schedule Group is roughly equivalent to an issue, although it can be used to group submissions together for other purposes. If you want to add an Issue to the system, you would add it as a new
schedule group, and set pagination targets. You could also add create schedule groups to handle batches of submissions for other purposes, such as a batch for uploading to a Web site. However, a submission can only belong to one schedule group at a time.

Use this folder to:

- Add new Schedule Groups (e.g. add issues)
- Set target publication dates plus target page and content budgets for a group
- Assign submissions to a specific schedule group
- Move submissions between schedule groups
- Modify existing Schedule Group settings
- Close Schedule groups to move them out of production

TO CONFIGURE: Only specified users can manage schedule groups. To enable this folder for users with a specific role, go to RoleManager, Editor Role or Publisher Role, select the role and set the Manage Schedule Groups permission.

The related permission View Schedule Group Details allows users to check a Schedule Group’s details whenever they see the group’s name. To enable this, go to RoleManager, Editor Role or Publisher Role, select a role and set this permission.

**Add Schedule Group**

This allows you to create a new schedule group, for example to add a new issue. This is a new Action Link, also available on the main Production Tasks menu. See the section on New Action Links, below, for more details.
TO CONFIGURE: Go to RoleManager, Editor Role or Publisher Role, select the role and set the **Manage Schedule Groups** permission.

## Closed Schedule Groups

### Closed Schedule Groups

The Schedule Groups listed below have been closed. New Production Tasks cannot be assigned for any of the submissions in these groups. To assign additional Production Tasks, click Re-open Group.

<table>
<thead>
<tr>
<th>Action</th>
<th>Schedule Group</th>
<th>Target Number at Submissions</th>
<th>Current Number of Submissions</th>
<th>Page Budget</th>
<th>Page Count</th>
<th>Target Publication Date</th>
<th>Target Publication Volume</th>
<th>Target Publication Issue</th>
<th>Black and White Image Budget</th>
<th>Black and White Image Count</th>
<th>Color Image Budget</th>
<th>Color Image Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re-open Group Production Status Grid</td>
<td>November 2006</td>
<td>16</td>
<td>160</td>
<td>0</td>
<td>Nov 20, 2006</td>
<td>4</td>
<td>Nov 26, 1996</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Re-open Group Production Status Grid</td>
<td>August 2006</td>
<td>16</td>
<td>160</td>
<td>0</td>
<td>Aug 21, 2006</td>
<td>3</td>
<td>Aug 10, 2006</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Re-open Group Production Status Grid</td>
<td>Re-release Pool</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Re-open Group Production Status Grid</td>
<td>Test SD</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Closed Schedule Groups**

This folder lists all schedule groups that have been previously closed, for example, issues which have been published. **Note:** groups must currently be manually closed to remove them from production and into this folder. Use this folder to:

- Reopen closed schedule groups.
- Review published material.

TO CONFIGURE: Go to RoleManager, Editor Role or Publisher Role, select the role and set the **Manage Schedule Groups** permission.

## View All Submissions with Production Completed

### View All Submissions with Production Completed

This folder lists all submissions where production has been completed, and therefore have the production status Production Completed.

<table>
<thead>
<tr>
<th>Action</th>
<th>Manuscript Number</th>
<th>Author Name</th>
<th>Schedule Group</th>
<th>Sections/Category</th>
<th>Article Type</th>
<th>Initial Date Submitted</th>
<th>Production Completed Date</th>
<th>Production Completed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return to Production Production Details History</td>
<td>387253</td>
<td>Anne Author (UNITED STATES)</td>
<td>Production Details History</td>
<td>Rapid Development</td>
<td>August 27, 2004</td>
<td>April 17, 2004</td>
<td>John MacKinnon</td>
<td></td>
</tr>
<tr>
<td>Return to Production Production Details History</td>
<td>3872-D-03-001D9288</td>
<td>Editor (STRAT)</td>
<td>Production Details History</td>
<td>Original Article</td>
<td>March 26, 2003</td>
<td>April 20, 2003</td>
<td>John MacKinnon</td>
<td></td>
</tr>
<tr>
<td>Return to Production Production Details History</td>
<td>387256</td>
<td>Anne Author (UNITED STATES)</td>
<td>Production Details History</td>
<td>Original Article</td>
<td>July 10, 2003</td>
<td>April 06, 2004</td>
<td>John MacKinnon</td>
<td></td>
</tr>
</tbody>
</table>

**View All Submissions with Production Completed**

Use this folder to:
• Return submissions to production.
• Access data and files for completed submissions

NOTE: submissions must currently be manually closed to remove them from production and into this folder. This can be done for individual submissions, but note that all submission assigned to a schedule group will be closed and moved into this folder when the associated Schedule Group is closed.

TO CONFIGURE: Enable the RoleManager permission View All Submissions in Production.

Production Tasks Reminder Report

This report allows you to create a list of tasks that may be overdue, nearly due, or which have been in progress for a specified time. You can choose to generate reminder letters from the list. The reporting process spans several pages.

The first page allows you to define your report; use the options here to limit your report to specific sets of submissions, tasks or assignees, and to define the date range for your reminders.
Use **Select Production Task** to limit the report run to just one type of task.

Use **Select Schedule Group** to limit the report run to tasks associated with submissions that have been assigned to one schedule group, for example to chase up tasks for a specific issue.

Use the **Assigned to** check boxes to limit the report to tasks assigned to selected types of user.

Choose one of the “Show open Production Tasks…” settings to base the report on. For example, choose the option “Show open Production Tasks that are [__] days past their due date.” and set the figure to “0” to list all submissions due today.

You can further limit the results to specific article types and section/category settings.
After you Submit your search, you are presented with a list of task assignments matching the search you just set up; you can select specific assignments and click the Send Reminders button to send reminder emails, as per normal Editorial Manager reminders. You can only do this if you have already set up one or more reminder letters and assigned them to the “Production Reminder” letter family.

TO CONFIGURE: To allow users with a specific role to run the report, go to RoleManager, Editor Role or Publisher Role, select the role and enable the permission Send Production Reminders.

Before you can generate reminder letters for production tasks, you need to create standard reminder templates. Go to PolicyManager and select “Edit Letters” under the E-mail and Letter Policies heading. Click “Add New Letter” to create a new template, and select “Production Reminder” as the letter family. Create a letter using the mail-merge fields listed below.

Search Submissions/Search People

These are the same as the Search links on the main editorial menu. With Production Tasks enabled, the Search Submissions page is enhanced.

- The DOI has been added to the Search Criteria you search for and can appear in the search results, if you have configured it as a selected identifier as described above.
- New Production-Task specific links are added to the Action column, based on your current permissions.

- The Advanced Criteria have been enhanced to allow you to filter your searches according to production status. If you cannot find a submission you know to be in production, check these criteria.

- Links back to the main Production Tasks pages have been added.

### Advanced criteria

The permission **Include only submissions which are currently in production** limits searches to submissions with the Production Status “In Production” or “Returned to Production”. With the subsidiary permission **Also include submissions where production has ended** set, the search will also include submissions with the production statuses “Production Completed” or “Production Cancelled”.

The permission **Include only submissions where production has ended** limits searches to submissions with the production statuses “Production Completed” or “Production Cancelled”.

---

Confidential – Subject to change – Copyright © 2006, Aries Systems Corporation

NOT FOR USE OUTSIDE OF ARIES
TO CONFIGURE: Selecting the normal search permissions in RoleManager will also make the Search links available on the Production Tracking menu as well. Searching can only be enabled for Editor Roles, not Publisher Roles.

New Viewing and Editing permissions

Several permissions have been added to the general View permissions to allow both editors working on peer review and production staff to review production notes and history.

Other permissions control who can create or edit production-related information.
View Production Details is the most important – anyone who can see the Production Details page will be able to modify some metadata, such as the production notes.

View Schedule groups allows you to see the details of the submissions assigned to each schedule group, and any associated pagination information.

View Production Status Grid allows users to view an overview of the progress of many submissions through key production tasks; you can allow users to check progress of individual submissions by giving them the View Production Status History permission.

Change Corresponding Production Editor allows you to change the person associated with the submission as Corresponding Production Editor. Note that the associated permission, Serve as Corresponding Production Editor, has to be set for at least one role and more than one person associated with that role for this to be useful.

Edit Submission Target Online Publication date allows you to set a target online publication date for an individual submission. Note that users with this permission are likely to need the Manage Schedule Groups permission, as that allows them to set target Online and regular Publication Dates for the schedule group as a whole.

Override Production Task Due Dates allows you to change the date an individual assignment is due. You should consider enabling this for any user who can Assign a production task, unless you wish to limit their ability to delay your schedule.
New Action Links

As with Editorial Manager, you process submissions by using Action links associated with individual submissions within a Production Tasks folder; most of these are controlled by RoleManager permissions.

Note that you do not need to use the “View Production Notes on Manuscript Details” and “Edit Production Notes on Manuscript Details” permissions for production staff with the “View Production Details” permission; the Production Details page assumes these permissions are present for anyone who can view it.

The existing Editorial Manager “download files” permission has been expanded to include:

- Download Companion Files
- Upload Companion Files

You need to enable these to allow users to access the companion files from the File Inventory Action link. **Note:** anyone who is assigned a production task will still be able to upload companion files when completing a task. You do not need to give people the Upload Companion Files permission if they will only send you files as part of a task assignment.

Companion files are Production-Specific files – all files returned as a result of a Production Task assignment are uploaded as Companion Files. Note that you can allow authors to upload Companion Files during submission, but these files are intended to be production-only and will not be built into the PDF seen by authors.

Finally, Production Task-specific permissions directly control the Action Links available to you in the Production Task menus.
- Initiate Production adds a new action link, Assign Production Task, to the main Manuscript Details page (not the Production Details page). This allows an editor working on a submission to start tracking production tasks.

  NOTE: this is not linked to the transmittal process; that is designed to send a submission to a separate production system.

- End Production/Return to Production allows you to take a submission out of production.

  NOTE: you cannot End Production for a submission with one or more open Production Task Assignments. You can also end production on a submission by closing the Schedule Group to which it is assigned.

- Manage Schedule Groups allows you to Close and Re-Open schedule groups. Closing a Schedule group removes it from production, and closes all associated submissions. If you re-open a schedule group, the associated submissions are not automatically re-opened; you will need to reinstate these individually.

- Assign Production Task allows you to assign a production task.

  NOTE: you need to make sure that at least one production task has been configured to allow this role to assign it, and has at least one valid recipient.

- Cancel Production Task Assignment allows you to cancel a task you have assigned.

- View Production Details displays the Production Details link on Production Tracking pages.

The results of each action link are described below.

**Assign Production Task (Initiate Production)**

To move a submission into Production, a user with the Initiate Production permission assigns the first production task. A user with this permission will see an “Assign Production Task” link in the main Details page, accessed from the Main Editorial Manager menu.
Use this link to initiate production, taking you through the process of:

- Assigning the submission to a Schedule Group (optional).
- Assigning the first Production Task.
- Assigning any additional production tasks relevant at this stage.

If you assign a submission to a schedule group, you can add additional pagination and running order information if you know it, or a user with the Modify Schedule Group permission can go in later and add this.
After assigning to a schedule group, you can submit without assigning a production task; this will initiate production without assigning the first Production Task.

Use the Submit and Assign Production Task to start production by assigning the first task in the workflow.

End Production

Allows you to take a submission out of production, when no more production tasks can be assigned; you will normally do this after the submission has been published (you would also use the Publish Information link to set the final publication dates). The submission’s Production Status changes to “Production Completed”.

Confidential – Subject to change – Copyright © 2006, Aries Systems Corporation
NOT FOR USE OUTSIDE OF ARIES
Note: End Production only appears when there are no open production task assignments. If you do not see this option for a specific submission, you may need to cancel any outstanding production tasks on that submission.

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “End Production/Return to Production”.

Return to Production

Available only from the “View All Submissions with Production Completed” folder, this function reinstates the submission. The Production Status changes to “Returned to Production” and the submissions returns to the “All Submission in Production” folder.

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “End Production/Return to Production”.
Add Schedule Group

Creates a new Schedule Group – if you are working with Volumes and Issue, then add each Issue as a Schedule Group. Schedule Groups can be given volume and issue numbers, and contain basic page and image budget information.

You can define a target publication date, and a separate target online publication date for each group. The group description will appear in production tracking lists.

When you create a Schedule Group, you can assign submissions using the Submit and Add Submissions to Group button; otherwise, just submit the group and you can add submissions later.
TO CONFIGURE: Use RoleManager to enable the Manage Schedule Group permission.

**Edit Group Details**

Allows you to modify the schedule group information, for example to add submissions to the group, to remove them, or to change the order in which submissions appear within the group.
Add Submission

This function allows you to assign submissions to the Schedule Group, building up a table of contents.

You can choose from unassigned submissions, or switch to a list of assigned submissions, allowing you to move submissions into the current Schedule Group from others.
Once you have added new submissions, you will return to the Edit Group Details page, where you should check the order of submissions.

Remove From Group

This removes an individual submission from the schedule group.
Close Group

This takes the entire schedule group “out of production”. All submissions within the schedule group will be set to “Production Complete”, and the Schedule Group will move to the Closed Schedule Group folders.

Note: You cannot close a Schedule Group if any submission assigned to it has any open production task assignments. You will need to Cancel or submit any outstanding assignments to close the Group.

Assign Production Task/Assign Another Production Task

Allows you to assign a production task to another person. When assigning a production task, you can select files to make available to the recipient and customise the notification email that will be sent. Once you have completed one task assignment, you can assign a second from the confirmation page.

During task assignment, you must select the files to make available to the person carrying out the task, unless they have permission to access the File Inventory for all submissions. You can select from original submission files from the author, or any Companion files that have been uploaded to the system.

The assignment process takes several steps.

1) Selecting the production task to assign. Users with the “View Production Status History” will see this displayed here, to allow you to check the task has not already been assigned. You will only see the list of tasks for which your role is selected under “Can be Assigned by”.

Confidential – Subject to change – Copyright © 2006, Aries Systems Corporation

NOT FOR USE OUTSIDE OF ARIES
2) After selecting the task, the page refreshes to display the full assignment letter and companion files. The next step is to select the correct recipient for the task; Preprint Manager will check the “Can be assigned to” setting, and list only those users with valid roles. If there is only one possible recipient on the database, they will automatically be selected. If you select a Corresponding Author task, the Corresponding Author will automatically be selected.

3) Edit the “letter Body” field to add any special instructions to the standard template that is displayed; this is the email that will be sent to the assigned person. You can also modify the subject area and add cc: addresses (Note: this is not a Blind Carbon Copy, or bcc: – the recipient will see these email addresses).
4) You should then select the files you want the assignee to work on as part of the task assignment. For users without access to the File Inventory, this is the only way they can download files from the system. For example, you can make the original manuscript text files available to the copy editor. You can upload additional Companion files at this point, and make these available to the recipient.

5) When you have selected the files, Click Assign Task and Send letter to complete the task assignment. You can assign another task from the confirmation screen.
TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “Assign Production Task”. You may also wish to set the associated permissions “Cancel Production Task Assignment” and “Override Production Task Due Date”.

The Production Task History section will only appear if you have the “View Production Status History” permission enabled.

Use PolicyManager to configure a set of production tasks that each role is allowed to assign, and to ensure that roles are configured to receive each task.

**Assign Follow-On Task**

If you submit a task that is configured to Allow Follow-On Task Assignments, then you will see the Assign Follow-On Production Tasks. You can continue to assign follow-on tasks from this page, and it will list all tasks assigned after completing the initial assignment.

**Note:** when assigning follow-on tasks, users without full File Inventory access can only pass Companion files that were sent to them for the initial assignment on to the next assignee, plus any Companion Files they have just uploaded.

For example, if you send a Manuscript file to a typesetter, and they upload a First Proof, and they are allowed to assign a Follow-On task of “Author Proof Correction” to the author, they will only be able to send the author the manuscript file originally assigned to them, plus the proof they just uploaded.

Users with full File Inventory access can assign any Companion Files when assigning a Follow-On Task.
Cancel Assignment

Allows you to cancel an assignment; a notification letter will be sent, which you can customise. Users with “Assign Production Task” permissions will see this option on any task they have assigned. Users with “View All Submissions in Production” will see this option for all assignments listed in the “View All Production Tasks with Authors” folder. Cancelling an assignment generates a letter to the assignee.

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “Cancel Production Task”.

View Assignment Letter
When viewing a list of your assigned production tasks, you can re-read the email that was sent to you on assignment of the task.

TO CONFIGURE: No configuration required; anyone who has been assigned a task with a covering email will see this link.

**View instructions (authors only)**

When authors review the list of production tasks assigned to you, this allows them to check any task instructions. Note that this link will only appear if instructions have been written when the task was configured.

TO CONFIGURE: No configuration is required to allow users to view the link; it will appear on assigned tasks where instructions have been written. To add instructions to a task, use PolicyManager, Configure Production Tasks and Edit the Production Task to add instructions to. Type your instructions into the “Production Task Custom Instructions:” field. You can include HTML in the instructions.

**Assignment Files**

When viewing a list of production tasks assigned to you, this allows you to download the files for that assignment. Note that only files specifically selected during assignment will be made available here.
TO CONFIGURE: No configuration required, but you should remember to select any files to be worked on when assigning each task.

Submit Task

This allows you to notify the journal office that you have completed an assignment, and to upload any new files to the system.

Edit the Letter Body to return any special comments to the journal office; you should consider modifying the Production Task instructions and Assignment letters to let the users who carry out tasks know to do this.
Use the Upload File button to attach completed files. It’s important not to forget to do this for most Production Tasks, so make sure the Production Task configuration option “Show Warning if File not uploaded when Task is Submitted” is checked.

TO CONFIGURE: All task assignments will make the Submit Task link available to the recipient, but you can change the behaviour of the task on assignment. Use Policy Manager, Configure Production Tasks, and Edit the Production Task to change the settings.

Set the option Allow follow-on Task Assignments to display the Follow-On Task Assignment page when this type of task is completed.

Set the option Show Warning if File not uploaded when Task is submitted to warn users if they forget to upload a file.
Set the option Limit the Submission Item Types that can be uploaded when Task is Submitted: to allow only certain types of file to be uploaded. If you do not select a valid item type, then users cannot upload files when completing this task.

Production Details

This displays the Production Details page.
TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permission “View Production Details”.

## History

This displays the normal History page, with the addition of the new Production Status History material, as described in the section “Editorial Manager pages modified by Production Tasks”, above.

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set the permissions “View Production Status History” and “View Production Correspondence History”.

### Production Tasks:

<table>
<thead>
<tr>
<th>Description</th>
<th>Production Task Status</th>
<th>Assigned To</th>
<th>Date Assigned</th>
<th>Date Task Due</th>
<th>Elapsed Days since assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Format manuscript</td>
<td>Open</td>
<td>P. Esteban</td>
<td>May 22, 2006</td>
<td>05/22/2006</td>
<td>0</td>
</tr>
<tr>
<td>Copy Editing</td>
<td>Open</td>
<td>Charles Copy-Editor</td>
<td>May 22, 2006</td>
<td>05/22/2006</td>
<td>0</td>
</tr>
<tr>
<td>Proof checking by Author</td>
<td>Open</td>
<td>John MacJohn</td>
<td>May 22, 2006</td>
<td>05/22/2006</td>
<td>0</td>
</tr>
</tbody>
</table>
**Transmittal Form**

This displays the normal Transmittal form viewable as a link from the main Details screen; this link is available on all main production tracking pages. You may need to do this to review information entered by the journal when setting the Final Disposition before releasing to Production.

TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set either of the permissions “View Transmittal Form” or “Edit Transmittal Form Fields”.

**File Inventory**

This displays the submission files and companion files associated with the submission. Submission files can only be downloaded, but Companion files can be uploaded by users with the correct permissions. You can allow an editor working on peer-review who does not otherwise have access to the Production Tasks to review and download companion files.

Use the Hide and Color Code options to manage the file inventory; Hide allows you to retire older versions of files, ensuring that only the current set of working files is visible; Color Code allows you to tag files, for example to track status or to organise and group files.
TO CONFIGURE: Use RoleManager, and edit the desired Editor or Publisher role. Set either of the permissions “Download Companion Files” or “Upload and Remove Companion files”.

Zip file download

A feature of File Inventory and Assignment files, ZIP file download allows you to select the files you want to download, and Preprint Manager will package them as a ZIP file on demand.

Simply tick the selection box in the “Include in ZIP File” column and click the Download ZIP file button – or click the “Check All” link underneath the Download ZIP file button to select all files for inclusion in the ZIP file.

Production Status Grid

This returns you to the production status grid. Depending on the current folder, you will see either the standard production status grid for multiple submissions or a status grid for the current submission only.
**Corresponding Production Editor**

For any individual submission, you can designate a specific person to be the Corresponding Production Editor for that submission. This allows you to route selected items of correspondence to that person, and also adds a series of mail-merge fields to allow you to include their details in correspondence.

The Corresponding Production Editor is changed on the Production Details page.

TO CONFIGURE:

Identify the types of users who can be designated as Corresponding Production Editors by using RoleManager, Publisher or Editor Role, select the desired Role and set/check the “Serve as Corresponding Production Editor” permission.

Identify the types of users who can choose and change the Corresponding Production Editor for a specific submission by using RoleManager, Publisher or Editor Role, select the desired Role and set/check the “Change Corresponding Production Editor” permission.

Configure any General Letters where responses should be directed or cc’d to the Corresponding Production Editor, and not the general journal address. Use PolicyManager, Edit Letters to Add or Edit such a letter. Select the “Use Corresponding Production Editor’s Address” option for the “Sender’s E-mail address” setting. This will route any responses to the Corresponding Production Editor when a person hits “Reply-To” in their email program. Optionally, you can select the “Corresponding Production Editor” option for the “Automatic cc:” option.

Configure any Ad-Hoc letters that should be sent directly or cc’d to the Corresponding Production Editor. Use PolicyManager, Edit Letters, and Add or Edit an Ad-Hoc from
Author or Ad-Hoc from Editor Letter. Select the “Corresponding Production Editor” option under the “Recipient” or “Automatic cc:” options.

Use the following mail-merge fields to insert details of the corresponding production editor:

%CORR_PROD_ED_REALNAME% - Inserts the Corresponding Production Editor’s full name; it does not use the nickname. Format is Title, first name, middle name, last name.

%CORR_PROD_EDITLE% - Inserts the Corresponding Production Editor’s Title.

%CORR_PROD_ED_FIRST_NAME% - Inserts the Corresponding Production Editor’s First Name.

%CORR_PROD_ED_MIDDLE_NAME% - Inserts the Corresponding Production Editor’s Middle Name.

%CORR_PROD_ED_LAST_NAME% - Inserts the Corresponding Production Editor’s Last Name.

%CORR_PROD_ED_DEGREE% - Inserts the Corresponding Production Editor’s Degree.

%CORR_PROD_ED_GREETING% - Inserts the greeting (nickname) field if it is not blank. If blank, it inserts the concatenation of title and last name. (example: Bob or Dr. Smith)

%CORR_PROD_ED_POSITION% - Inserts the Corresponding Production Editor’s Position

%CORR_PROD_ED_ADDRESS% - Inserts a block address field consisting of the institution, address lines 1-4, city, state, postal code, country.

%CORR_PROD_ED_DEPARTMENT% - Inserts the Corresponding Production Editor’s Department.

%CORR_PROD_ED_INSTITUTION% - Inserts the Corresponding Production Editor’s Institution.

%CORR_PROD_ED_ADDRESS1% - Inserts the Corresponding Production Editor’s Address1.

%CORR_PROD_ED_ADDRESS2% - Inserts the Corresponding Production Editor’s Address2.

%CORR_PROD_ED_ADDRESS3% - Inserts the Corresponding Production Editor’s Address3.

%CORR_PROD_ED_ADDRESS4% - Inserts the Corresponding Production Editor’s Address4.
%CORR_PROD_ED_CITY% - Inserts the Corresponding Production Editor’s City.
%CORR_PROD_ED_STATE% - Inserts the Corresponding Production Editor’s State.
%CORR_PROD_ED_ZIP_CODE% - Inserts the Corresponding Production Editor’s Postal Code.
%CORR_PROD_ED_COUNTRY% - Inserts the Corresponding Production Editor’s Country.
%CORR_PROD_ED_EMAIL% - Inserts the Corresponding Production Editor’s E-Mail address.
%CORR_PROD_ED_PHONE% - Inserts the Corresponding Production Editor’s telephone number.
%CORR_PROD_ED_FAX% - Inserts the Corresponding Production Editor’s FAX number.
%CORR_PROD_ED_ROLE% - Inserts the Role name of the Corresponding Production Editor
%CORR_PROD_ED_DESCRIPTION% - Inserts the Editor or Publisher Description (if any) of the Corresponding Production Editor.

**Mail-merge Fields for Production Tracking**

Providing that Production Tracking is enabled, additional new merge fields are available:

%PROD_STATUS% - pulls the latest production status term related to the manuscript (i.e. ‘Not in Production’, ‘In Production’, ‘Production Completed’, ‘Returned to Production’).

The following merge fields may be used in letters assigned to the ‘Author Reminder’, ‘Editor Reminder’, ‘Publisher Reminder’, ‘Production’ families, or assignment letters (these letters do not have a specific family):

%PRODTASK% - Pulls in the name of the Production Task assigned to the recipient relevant to the specific submission.

%PRODTASK_INSTRUCTIONS% - Pulls in any custom instructions associated with the production task (configured on the ‘Add/Edit Production Task’ page.

%PRODTASK_DUE_DATE% - Pulls in the due date of the Production Task assigned to the recipient for the submission.

%PRODTASK.Assign_DATE% - Pulls in the date the task was assigned to the recipient.

%PRODTASK_ASSIGNEDBY% - Pulls in the name of the person who assigned the Production Task.
%PRODTASK_ASSIGNEDTO% - pulls in the name of the person to whom the Production Task is assigned.

%PRODTASK_COMPLETED_DATE% - Pulls in the stop date for the task. This date may be the date the task was submitted or the cancellation date.

%PRODTASK_LASTREMIND_DATE% - Inserts the date on which the recipient was last reminded for the specific task.

%PRODTASK_DAYS_LATE% - Inserts the number of days that a specific Production Task, assigned to the recipient, is beyond the due date.

%PRODTASK_REMIND_COUNT% will insert the number of reminder letters that have been sent to the specific recipient for the specific task.

%PRODTASK_STATUS% - pulls in the status term associated with the Production Task (i.e. Canceled, Open or Completed).

The following merge fields have been added which are not dependent on Production Tracking:

%DOI% - Inserts the contents of the submission’s DOI field.

%PROD_NOTES% - pulls in the production notes.

**Useful 5.0 Features**

These new features are available to both peer-review and production tracking workflows, and you may find them useful. They are described in the general Editorial Manager 5.0 release notes.
Customized Flags

This feature allows you to display small icons by each Submission’s Details and Production Details links, alerting you to special submissions. Examples of their use in Production Tracking include:

- Indicating “fast-track” submissions
- Indicating submissions which are “on hold”
- Indicating submissions with images suitable for the printed issue cover
- Indicating submissions with companion papers

Additional Manuscript Details

This feature allows you to create new metadata fields to store any information not covered by the standard Editorial Manager or Preprint Manager fields. These fields are accessed from the main Details and Production Details pages.

You can combine them with customized flags to store important data and alert users to its presence. For example:

- Create an Additional Manuscript Detail field called “Publish With”.
- Create a Customized Flag called “Publish With”.

Confidential – Subject to change – Copyright © 2006, Aries Systems Corporation
NOT FOR USE OUTSIDE OF ARIES
If you use the Additional Detail field to type in the number of a companion paper, you also set the customized flag so you’re aware that the submission is dependent on other submissions.

**Example: Configuring a Copy-Editing stage before Transmittal**

This assumes that you are running a journal that wants to use Production Tasks to assign each accepted submission to a Copy Editor before sending it to the publisher via the normal Transmittal process.

This is currently difficult to track within Editorial Manager as you cannot assign a submission to an Editor after the author has been notified of the decision. As Production Tasks are independent of peer-review, this can be handled easily.

The key characteristics of this configuration are:

- There is a single task to track, and scheduling is unnecessary.
- There will be only a single copy-editor role required in addition to the normal journal editors.
- The copy-editor requires minimal information; just the ability to download the file, and upload the results to the journal.
- The administrator will assign the submission to the copy-editor

**Configuration**

Assuming that Production Tasks have been enabled for the journal, configuration is as follows:

In RoleManager, give the journal administrator the permissions:

- Initiate Production
- End Production
- View all submissions in Production
- View Production Details
- Assign Production Task
- Cancel Production Task Assignment
- Override Production Task Due Date

In RoleManager, create a new Publisher Role “Copy Editor”. Give this role the single permission:

- Receive Production Task
Proxy-register the copy-editor and assign the new publisher Role to the record.

In PolicyManager, use Edit Submission Items to create a “Copy-Edited Text” item type. Set this to have the PDF handling “Companion File (not built into the PDF)”. There is no need to change any article type settings.

In PolicyManager, use Edit letters to create three new production task templates for:

- Assigning a submission to the Copy Editor
- Cancelling a Copy-Editing Assignment
- Notifying the journal office of a completed copy-editing assignment

In PolicyManager, use Configure Production Tasks to add a new production task, “Copy Editing”. Configure this as follows:

- Can be Assigned by: Journal Administrator
- Can be Assigned to: Selected Editor/Publisher Roles only: Copy-Editor
- Check the Show Warning if File not uploaded when Task is Submitted setting
- Due date: Check the Number of Days after Assignment Date: option, and set a default duration, e.g. 3 days.
- Set the Letter options, selecting the three letters just configured.

**Use**

In practice, the new copy-editing process is:

- The author is notified of the decision.
- The journal administrator locates the submission in All Submissions with Editor’s Decision.
- The administrator opens Details, and clicks Assign Production Task to assign the production task to the copy-editor, selecting the files that need to be copy-edited.
- The Copy-Editor receives an email notification.
- The Copy-Editor logs into the system and downloads the files assigned to them.
- When editing is complete, the Copy-Editor logs into the system and clicks “Submit Task”; using the “Upload Companion Files” to attach the new files to the submission.
- The administrator receives notification via email.
- The administrator locates the submission and sets the Final Disposition and goes through transmittal as before, selecting the copy-edited files to go to the publisher.
• The administrator locates the submission in “All submissions in Production” and uses “End production” to move the submission out of the “All submissions in Production” folder.

This is a very simple process. To manage the copy-editing, the administrator can use the “Production Tasks I have Assigned” folder to review submissions and have overdue tasks highlighted in red.