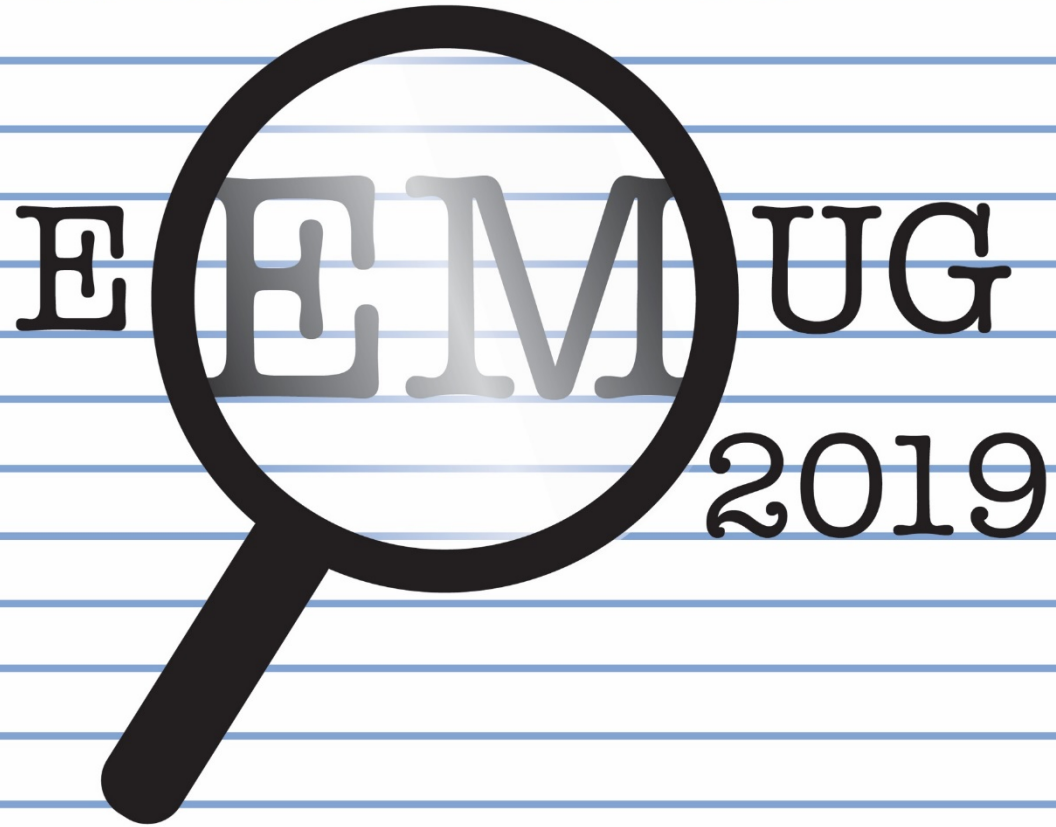


Welcome to



#EEMUG2019



All About Tasks

Tina Fleischer, Account Coordinator, tfleischer@ariessys.com





- What is ProduXion Manager?
- Production Task 101
- Initiating Production and Assigning Production Tasks in PM
- Challenges
- Task Manager Use Cases
- Task Manager Action Links and Folder Views
- PM and Task Manager Configurations



What Is ProduXion Manager?



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





Production Task 101



All About Production Tasks

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




Initiating Production and Using Production Tasks in ProduXion Manager




Initiating Production

Editor 'To-Do' List


My Pending Assignments (25)

 **New Submissions (18)**


Revised Submissions (0)

 **New Submissions Requiring Assignment (2)**

Revised Submissions Requiring Assignment (0)

 **Submissions Sent Back to Author for Approval (1)**

New Assignments (0)

 **Submissions with Required Reviews Complete (1)**

Submissions Requiring Additional Reviewers (0)

Submissions with One or More Late Reviews (0)

Submissions with Active Discussions (3) **1**

Reviews in Progress (0)

- [View Submission](#)
- [Duplicate Submission Check \(70%\)](#)
- [Details ▾](#)
- [Initiate Discussion](#)
- [History](#)
- [Technical Check](#)
- [File Inventory](#)
- [Edit Submission](#)
- [Send Back to Author](#)
- [Remove Submission](#)
- [Classifications](#)
- [Set Final Disposition](#)
- [Initiate Production](#)
- [Send E-mail](#)
- [Linked Submissions](#)

DEMOJES141-
D-18-00039

Original
Study

Low atmosphere
drifting balloons:
platforms for
environment
monitoring and
forecast
improvement

[Bea Arthur ▾](#)

Mar 27 2018
3:34PM

Mar 27
2018
3:34PM

Manuscript
Submitted




Assigning Schedule Group

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

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

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

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

Cancel Proceed



To Assign or Not to Assign? That Is the Question.



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

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

To initiate production without assigning a production task, click the 'Proceed Without Selecting a Task' button.

Schedule Group: No Schedule Group Assigned

Production Task: Author Welcome Kit

Cancel

Proceed with Selected Task

Proceed Without Selecting a Task

You can choose to:

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



To Assign Is the Answer, Evidently...

Cancel Assign Task and Send Letter

Schedule Group: No Schedule Group Assigned
Production Task: Logging/Verification
Task Assigned to:
Due Date:
Assignment Letter:
From: "mary mary" <jsnapke@ariessys.com>
To:
Letter Purpose: Production Task Assigned
Letter Subject: [%PRODTASK% for Article DEMOJES141-D-18-00039 Has Been Assigned
Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).
cc:
bcc:
Letter Body:
The [%PRODTASK% task has been assigned to [%PRODTASK_ASSIGNEDTO% for Article DEMOJES141-D-18-00039.
Instructions:
[%PRODTASK_INSTRUCTIONS%
Due Date: [%PRODTASK_DUE_DATE%
Thank you.

Editorial Proposal Menu Production Tasks

Search

















Managing Editor Production Tasks Menu

To-Do List

- Submission Tasks Assigned to Me (249)
- Schedule Group Tasks Assigned to Me (17)
- At-Risk' Submissions (729)



Assign Production Task

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



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





Challenges



Challenges for Editorial Tasks

- Production Tasks are being done by two different teams
- Pre-acceptance and post-acceptance manuscripts in the Production Tasks menus/grid views
- Different terminology used in Editorial and Production
- May have tasks running on submissions that don't end up accepted for publication
- It can mess with your stats



What's a Solution?



How Can Task Manager Help?

- No need to Initiate Production!
- Keep terminology familiar to users
- Keep Editorial and Production Tasks on separate teams
- Keep Editorial and Production separate in reporting





Divide and Conquer!



- Editorial Task Staff: This role would have access to view all submissions in Task Manager but would not see submissions in production.
- Production Staff: Access to view all submissions in production, but would not see submissions in Task Manager.
- System Administrator: This role could have access to view all submissions in both Task Manager and Production. Users with this role would be able to manually assign tasks in Task Manager and initiate production on submissions, as well as assign production tasks as needed.



Some Task Manager Use Cases



Editorial Tasks

- an online pre-print server
- for copyright checking/forms
- for artwork checking/pre-processing
- a language-editing service
- a taxonomy or semantic enrichment service
- a copy-editor/vendor/other third party service provider



SSRN: research repository and community for researchers

A freely accessible
repository of
abstracts and pre-print
full-text papers...



...and a
community where
researchers can
shape the thinking
in their fields




Researchers are connected, ideas are developed and working papers are shared



- 838K Research Papers
- 2.2M Registered Users
- 418K Authors



Assigning an Editorial Task Using Task Manager

<ul style="list-style-type: none">View SubmissionDuplicate Submission Check (20)Details HistoryClassificationsUnassign EditorFile InventoryEdit SubmissionInvite ReviewersSolicit CommentaryView Reviews and CommentsSet Final DispositionAssign Editorial TaskInitiate ProductionSend E-mailLinked Submissions	DEMOVS141-D-18-00001	Original Study	Taming Temptation: Visual Perspective Impacts Consumption and Willingness to Pay For Unhealthy Foods	mary mary	Oct 03, 2017	Aug 28, 2018	Required Reviews Completed	Justin Timberlake	1 Complete (more...)
--	----------------------	----------------	--	-----------	--------------	--------------	----------------------------	-------------------	----------------------



Assigning an Editorial Task Using Task Manager

Assign Task For Manuscript Number: DEMOVS141-D-18-00001
mary mary (UNITED STATES): "Taming Temptation: Visual Perspective Impacts Consumption and Willingness to Pay For Unhealthy Foods"

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

Task: Preprint Server Deposit

Cancel

Proceed with Selected Task



Assigning an Editorial Task Using Task Manager

Assign Task For Manuscript Number: DEMOVS141-D-18-00001
mary mary (UNITED STATES): "Taming Temptation: Visual Perspective Impacts Consumption and Willingness to Pay For Unhealthy Foods"

Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the

Task: Preprint Server Deposit
Task Assigned to: SSRN Staff/Publisher
Due Date: None required (this is a Milestone Task)

Assignment
Letter:

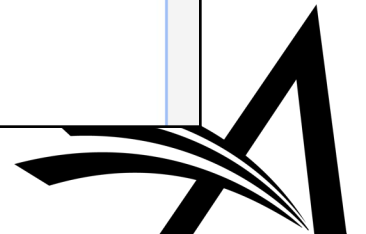
From: "Thomas Task" <taskmanager@trash.com>
To: **SSRN Staff**
Letter Purpose: Editorial Task Assignment
Letter Subject: Editorial Task Assignment

Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:
bcc:

Letter Body:

Dear %PRODTASK_ASSIGNEDTO%,
This is an automated email for the undertaking of the following production task: %PRODTASK%. The manuscript information for this task is below.
Manuscript Number: DEMOVS141-D-18-00001
Title: Taming Temptation: Visual Perspective Impacts Consumption and Willingness to Pay For Unhealthy Foods
Author: Dr. mary mary
Thank you for your help.
%PRODTASK_ASSIGNEDBY%



Assigning an Editorial Task Using Task Manager

Submission Files

Item	Description	Item Family	File Name	Size	Last Modified	Allow Download
Manuscript	PDF	Document	Test Manuscript.doc	187.5 KB	Jul 11, 2016	<input type="checkbox"/>
						<input checked="" type="checkbox"/>

[Check All](#) [Clear All](#)

Companion Files

[Upload New Companion File](#)

[Cancel](#) [Assign Task and Send Letter](#)





Action Links and Folder Views



History

View Submission Duplicate Submission Check (20) Details ▾ History Classifications Unassign Editor File Inventory Edit Submission Invite Reviewers Solicit Commentary View Reviews and Comments Set Final Disposition Send E-mail Linked Submissions	DEMOVS141-D-18-00001	Original Study	Taming Temptation: Visual Perspective Impacts Consumption and Willingness to Pay For Unhealthy Foods
--	----------------------	----------------	--



STATUS HISTORY								
Status Date	Document Status	Edit Submission Status	Production Status	Task Manager Status	Status Days	Role Family	Revision	Operator
Jan 8 2019 3:23PM			Production Completed		----		0	Thomas Task [Proxied by mary mary]
Jan 8 2019 3:23PM				Task Manager Completed	----		0	Thomas Task [Proxied by mary mary]
Jan 8 2019 3:23PM				In Task Manager	----		0	Thomas Task [Proxied by mary mary]
Jan 8 2019 3:23PM				Task Manager Initiated	----		0	Thomas Task [Proxied by mary mary]



History

PRODUCTION TASK HISTORY

Production Task	Date Task Assigned	Date Task Due	Assigned To	Assigned By	Production Task Status	Date Task Closed	Closed By	Assigned Task Files
Preprint Server Deposit <i>Assigned in Task Manager</i>	Jan 08, 2019	Jan 08, 2019	SSRN Staff	Thomas Task	Completed	Jan 08, 2019	Thomas Task	Assignment Files

CORRESPONDENCE HISTORY

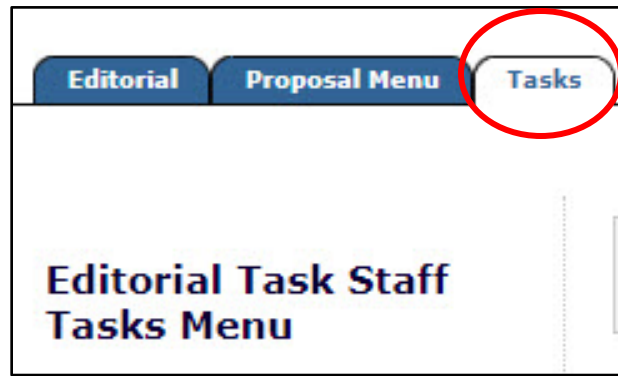
[Add Editorial Correspondence](#)

[Add Production Correspondence](#)

Correspondence Date	Letter	Recipient	Status	Revision	Operator
Jan 08, 2019	<i>Editorial Task Assignment</i>	SSRN Staff			Thomas Task [Proxied by mary mary]



Tasks Tab and View All Submissions in Task Manager



View All Submissions in Task Manager

Action	Manuscript Number	Author Name	Article Title	Article Type	Initial Date Submitted	Date Task Manager Initiated	Production Status
View Submission End Task Manager Task Manager Details ▾ History File Inventory Edit Submission Send E-mail Linked Submissions		Victoria Scibilia ▾ (UNITED STATES)	End Task Manager	Original Study	Mar 13, 2018	Jan 07, 2019	NA
View Submission Task Manager Details ▾ History File Inventory Edit Submission Send E-mail Linked Submissions		Allan Author ▾ (UNITED STATES)	Editorial Task Manager Test	Original Study	Jan 07, 2019	Jan 07, 2019	NA
View Submission Assign Editorial Task Initiate Production Task Manager Details ▾ History File Inventory Edit Submission Send E-mail Linked Submissions		Allan Author ▾ (UNITED STATES)	Task Manager Test 2	Original Study	Jan 07, 2019	Jan 07, 2019	NA



Task Manager Details Page

**Details for Manuscript Number: Unassigned
Allan Author (UNITED STATES): "Task Manager Test 2"**

[Cancel](#) [Save](#) [Save and Close](#)

[Production Status](#) [Select Submissions Flags](#) [Abstract](#) [Manuscript Notes](#) [Production Tasks](#)

DOI:	<input type="text"/>
Full Title:	Task Manager Test 2
Short Title:	
Corresponding Author:	Allan Author ▾ UNITED STATES
Corresponding Author E-Mail:	aaauthor@ariestrash.com
Author Comments:	
Article Type:	Original Study
Section/Category:	
Keywords:	
Classifications:	This manuscript does not have any Classifications.
Technical Check:	Technical Check Information
Requested Editor:	
Editorial Status Date:	Jan 07, 2019
Current Editorial Status:	Manuscript Submitted
Production Status:	Not in Production Top
Corresponding Production Editor:	None ▾
Submission Target Online Publication Date:	<input type="text"/> <input type="text"/> (mm/dd/yyyy)
Schedule Group Target Online Publication Date:	
Target Number of Pages:	<input type="text" value="0"/>
Black and White Image Count:	<input type="text" value="0"/>
Color Image Count:	<input type="text" value="0"/>
Publish Information:	Publish Information
File Inventory:	File Inventory
Production Notes:	<div style="border: 1px solid #ccc; height: 60px; padding: 5px;">Insert Special Character</div>
Transmittal Form:	Link to Transmittal Form
Discussion Forum:	Initiate Discussion
Submission Flags:	▾
Select Submissions Flags:	Add/Edit Submission Flags Top
Final Disposition Term:	



Task Manager Details Page

Abstract: Top
Abstract

Manuscript Notes: Top
 Display Manuscript Notes Flag Insert Special Character

Additional Information

Questionnaire Responses

Please confirm you have approval from all Co-authors to submit this manuscript?
(No Response)

If you have submitted this manuscript to another publication please give details below
(No Response)

Please enter the **Word Count** of your manuscript
(No Response)

Production Tasks Top

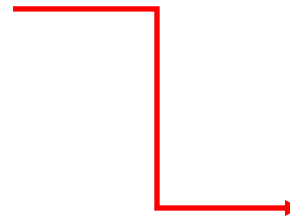
Description:	Language Edit (Assigned in Task Manager)
Production Task Status:	Open
Assigned To:	Thomas Task ▾
Date Assigned:	Jan 07, 2019
Date Task Due:	01/10/2019 <input type="text"/> (mm/dd/yyyy)
Elapsed Days (since assignment):	1
Description:	Copyright Check (Assigned in Task Manager)
Production Task Status:	Open
Assigned To:	Thomas Task ▾
Date Assigned:	Jan 07, 2019
Date Task Due:	01/07/2019 <input type="text"/> (mm/dd/yyyy)
Elapsed Days (since assignment):	1
Description:	Language Edit (Assigned in Task Manager)
Production Task Status:	Open
Assigned To:	Victoria Scibilia ▾
Date Assigned:	Jan 08, 2019
Date Task Due:	01/11/2019 <input type="text"/> (mm/dd/yyyy)
Elapsed Days (since assignment):	0
Duplicate Submission Check:	Duplicate Submission Check (80%)



Submission Tasks I Have Assigned Folder

Overview

- [View All Submissions in Task Manager \(4\)](#)
- [Production Initiated - No Tasks Assigned \(0\)](#)
- [Submission Tasks I Have Assigned \(1\)](#)



Action

- [Cancel Assignment](#)
- [Reassign Task](#)
- [Assign Editorial Task](#)
- [Task Manager Details](#)
- [History](#)
- [Edit Submission](#)
- [File Inventory](#)
- [Send E-mail](#)



Submission Tasks Assigned to Me Folder



Submission Tasks Assigned to Me Folder

[Switch to Status Grid View](#)

Action ▲	Manuscript Number ▲▼	Author Name ▲▼	Article Title ▲▼	Production Status ▲▼	Task ▲▼	Date Task Assigned ▲▼	Date Task Due ▲▼	Days Until Due ▲▼	Assigned By ▲▼
View Assignment Letter Submit Task Reassign Task Assign Editorial Task Task Manager Details ▾ History Edit Submission Send E-mail		Allan Author (UNITED STATES)	Task Manager Test 2		Copyright Check	Jan 07, 2019	Jan 07, 2019	1 day overdue	Victoria Scibilia
View Assignment Letter Submit Task Reassign Task Assign Editorial Task Task Manager Details ▾ History Edit Submission Send E-mail		Allan Author (UNITED STATES)	Task Manager Test 2		Language Edit	Jan 07, 2019	Jan 10, 2019	2 days	Victoria Scibilia
View Assignment Letter Submit Task Reassign Task Assign Editorial Task Task Manager Details ▾ History Edit Submission Send E-mail		Arthur Author (UNITED STATES)	Task Manager 15.1 Demo		Language Edit	Jan 08, 2019	Jan 11, 2019	3 days	Victoria Scibilia



Submission Tasks Assigned to Me Folder

[Switch to Status Grid View](#)

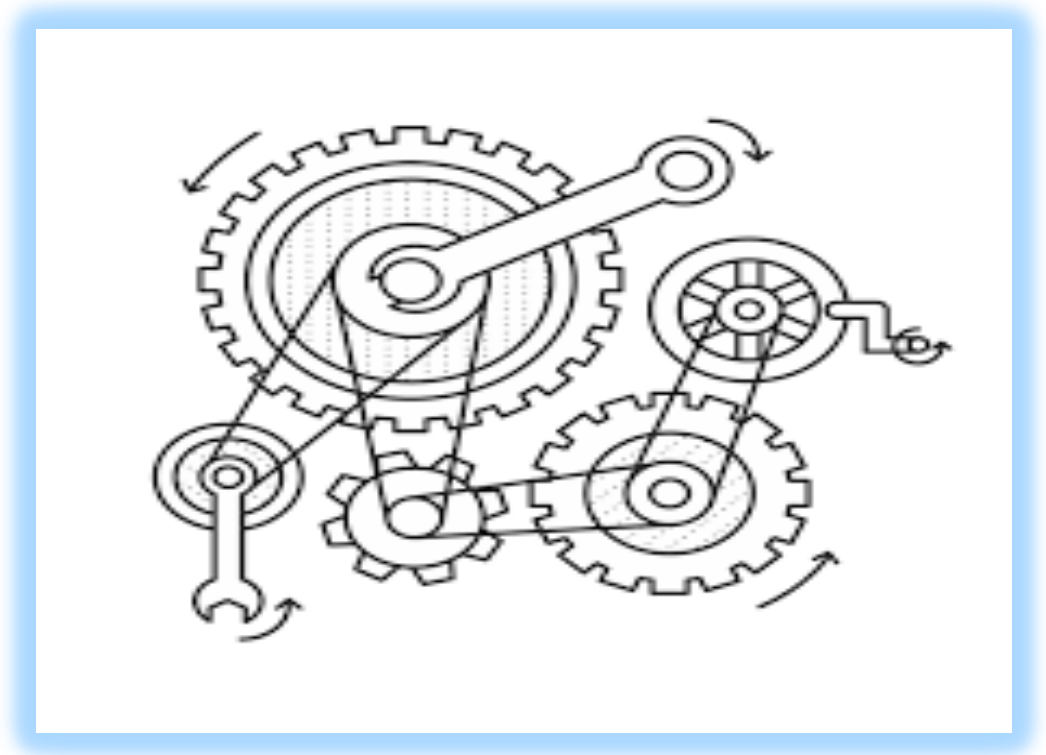
Action ▲	Manuscript Number ▲▼	Author Name ▲▼	Article Title ▲▼	Production Status ▲▼	Task ▲▼	Date Task Assigned ▲▼	Date Task Due ▲▼	Days Until Due ▲▼	Assigned By ▲▼
View Assignment Letter Submit Task Reassign Task Assign Editorial Task Task Manager Details ▾ History Edit Submission Send E-mail		Allan Author (UNITED STATES)	Task Manager Test 2		Copyright Check	Jan 07, 2019	Jan 07, 2019	1 day overdue	Victoria Scibilia
View Assignment Letter Submit Task Reassign Task Assign Editorial Task Task Manager Details ▾ History Edit Submission Send E-mail		Allan Author (UNITED STATES)	Task Manager Test 2		Language Edit	Jan 07, 2019	Jan 10, 2019	2 days	Victoria Scibilia
View Assignment Letter Submit Task Reassign Task Assign Editorial Task Task Manager Details ▾ History Edit Submission Send E-mail		Arthur Author (UNITED STATES)	Task Manager 15.1 Demo		Language Edit	Jan 08, 2019	Jan 11, 2019	3 days	Victoria Scibilia



Submission Tasks Assigned to Me Folder: Status Grid View

Action ▲	Manuscript Number ▲▼	Author Name ▲▼	Article Title ▲▼	Production Status ▲▼	Date Production Started ▲▼	Language Edit	Copyright Check
Task Manager Details ▾ History Assign Editorial Task File Inventory Send E-mail		Allan Author (UNITED STATES)	Task Manager Test 2			Due Jan 10, 2019 Thomas Task	Due Jan 07, 2019 Thomas Task
Task Manager Details ▾ History Assign Editorial Task File Inventory Send E-mail		Arthur Author (UNITED STATES)	Task Manager 15.1 Demo			Due Jan 11, 2019 Thomas Task	









PM and Task Manager Configurations



RoleManager

Permissions to see status, assignment, and correspondence histories.

- View Editorial Status History
-  View Submission Production Status History
-  View Submission Production Task Assignment History
-  View Schedule Group Production Task Assignment History
- View Editorial Correspondence History
 - Edit Letter when Resending
-  View Submission Production Correspondence History



RoleManager

Permissions to view custom Details, see Status Grid View, assign and receive tasks, and view editorial terms.

- ProduXion Manager**
 - Create Submission
 - Initiate Production Manually
 - Allow Task Assignment and Assignment to Schedule Group when Initiating Production
 - Serve as Corresponding Production Editor
 - Change Corresponding Production Editor
 - View Schedule Groups
 - Manage Schedule Groups
 - Assign Submissions to Multiple Schedule Groups
 - Copy Contents when Copying a Group
 - Automatically Cancel Production Task Assignments when Closing Schedule Groups
 - Edit Submission Target Online Publication Date
 - View Production Details
 - Use Production Details Layout
 - View Production Status Grid
 - View At-Risk Submissions
 - View All Submissions in Production
 - End Production/Return to Production
 - Assign Submission Production Task
 - Assign Editorial Tasks in Task Manager
 - Assign Schedule Group Production Task
 - Cancel Production Task Assignment
 - Override Submission Production Task Due Date
 - Override Schedule Group Production Task Due Date
 - Receive Production Task
 - Create Automated Submission Tasks Reminders
 - Create Automated Schedule Group Tasks Reminders
 - Send Production Reminders
 - Run Production Task Assignment Totals Report
 - Use 'Task Manager' Labels



PolicyManager > General Policies > Define Details Page Layouts

[-] General Policies

- [Set Manuscript Number Type](#)
- [Set Manuscript Number Revision Suffix](#)
- [Set Date Format](#)
- [Set Time Zone Display Policy](#)
- [Configure Unavailability Check and Instructions](#)
- [Configure Identity Confidence Check](#)
- [Set ISO Country Standard](#)
- [Configure General Due Date Preferences](#)
- [Set Reviewer Preferences](#)
- [Configure Electronic Calendar Due Date Preferences](#)
- [Set Editor Deep Link Expiration](#)
- [Set Enterprise Analytics Reporting Deep Link](#)
- [Define Details Page Layouts](#)
- [Set Update Information Deep Link Expiration](#)
- [Create Customized Submission Flags](#)



PolicyManager > General Policies > Define Details Page Layouts

Details Page Layouts

on each user can see. After defining a custom Layout, use RoleManager to
rently selected for use by any role. Use the **Copy** link to create a new La

Default Layouts

Default Editorial	Copy
Default Proposals	Copy
Default Production	Copy

User-Defined Layouts

Alternate Editorial Details Page	Remove	Edit	Copy
----------------------------------	------------------------	----------------------	----------------------

[Add New Layout](#)

[Return to PolicyManager](#)



Add/Edit Details Page Layout for Copy of Default Production

Cancel

Submit

Layout Name:
(Maximum of 100 characters)

Page Title

- Use standard identifiers (Manuscript Number and Title)
 Use identifiers selected in "Configure Identifiers Displayed in Production Tracking"

Select Items

These links allow you to select the items that can appear in this details page. Use the Select/Add Section Headings link to add headings to your layout for ease of navigation. Note that certain RoleManager "View" permissions take precedence, and will suppress the field if a user without the correct permissions has access to this layout.

[Select Section Headings to Display](#)
[Select Items to Display](#)

Layout order

Select the order in which the items should appear on the Details page. To re-order the items, change the number for one item, click the 'Update Order' button, and all of the fields will re-order accordingly. Check/tick the "Show Link to this Item" option to include a link to the item at the top of the details page when that item is displayed.

Section Headings are shown in bold text.

Update Order

Order	Default Description	Show link to this item
<input type="text" value="1"/>	Additional Manuscript Details	<input type="checkbox"/>
<input type="text" value="2"/>	DOI	<input type="checkbox"/>
<input type="text" value="3"/>	Full Title	<input type="checkbox"/>
<input type="text" value="4"/>	Short Title	<input type="checkbox"/>
<input type="text" value="5"/>	Corresponding Author <i>(First, Middle and Last Name, Institute, City, State, and Country)</i>	<input type="checkbox"/>
<input type="text" value="6"/>	Corresponding Author E-Mail	<input type="checkbox"/>
<input type="text" value="7"/>	Author Comments	<input type="checkbox"/>
<input type="text" value="8"/>	Other Authors <i>(List excluding Corresponding Author)</i>	<input type="checkbox"/>
<input type="text" value="9"/>	Article Type	<input type="checkbox"/>
<input type="text" value="10"/>	Section/Category	<input type="checkbox"/>

Select Items to Display for Copy of Default Production

Select the information to appear on the Details page

* Items marked with an asterisk are subject to additional permissions, which may mean that some users not be able to view them until you give them the additional permission to do so in RoleManager.

Expand All

Collapse All

- Links**
- Information Submitted by Author**
- General Manuscript Information**
- Proposal Specific Information**
- Key Workflow Dates and Status Information**
- Information for Invited Article Types**
- Assignments and Invitations**
- Publishing and Production Information**

Expand All

Collapse All

Cancel

Submit



PolicyManager > ProduXion Manager > Configure Task Manager Policies

- ☰ **ProduXion Manager**
 - Configure Automatic Production Initiation
 - Configure Automatic Copy of Target to Actual Publication Information
 - Configure Book Processing
 - Configure NIHMS Embargo Period Rules
 - Configure Submission Workflows and Production Tasks
 - Configure Schedule Group Production Tasks
 - Configure Task Manager Policies**
 - Set Production Task Deep Link Expirations
 - Configure Identifiers Displayed in Production Tracking
 - Configure Production Statuses
 - Define National Holidays
 - Configure Attachment Security
 - Edit Instructions for Attachments
 - Set Attachments Deep Link Policy



PolicyManager > ProduXion Manager > Configure Task Manager Policies

Configure Task Manager Policies

Users with the "Assign Editorial Tasks in Task Manager" RoleManager permission will be able to assign Editorial Tasks on submissions before Production is initiated. Submissions on which Editorial Tasks have been assigned will remain in Task Manager until Task Manager is manually closed, or one of the events selected on this page takes place.

Automatically end Task Manager when Production is initiated (if no tasks are open)

Automatically end Task Manager when Final Disposition is set (if no tasks are open)



PolicyManager > ProduXion Manager > Configure Task Manager Policies

Automatically end Task Manager when Production is initiated (if no tasks are open)

- If tasks *are* open, they remain open and can be submitted, but no new tasks can be assigned.
- If you Initiate Production and then End Production, Task Manager will return.
- If you are not using ProduXion Manager for Production Tracking, this setting is not applicable because you never need to Initiate Production.

Automatically end Task Manager when final disposition is set (if no tasks are open)

- If tasks *are* open, they remain open and can be submitted, but no new tasks can be assigned.

Check both boxes: whichever happens first applies.

Check no boxes: you must end Task Manager manually.



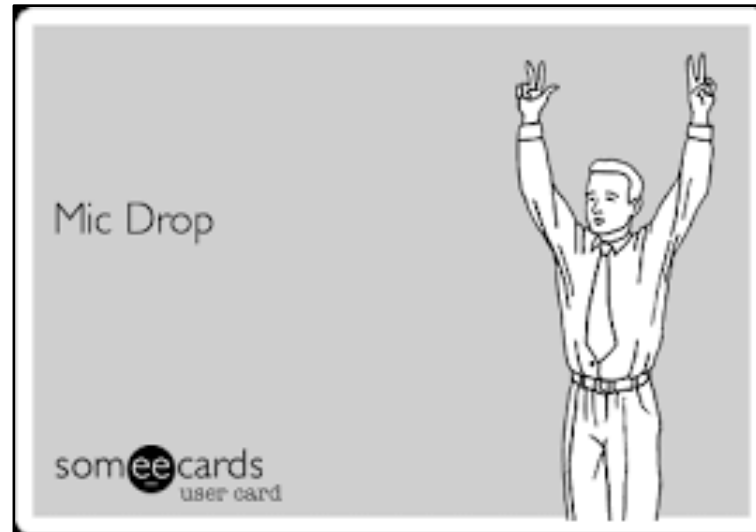
A Few Words About Letters



There are three letters you might need for a task:

1. Task Assignment Letter: the letter sent to the person assigned the task
2. Task Cancellation Letter: the letter sent to the person assigned the task if the task is subsequently cancelled
3. Task Submission Letter: the letter sent to the assigner when the assignee has completed the task

None of these letters is required.



PolicyManager > E-mail and Letter Policies > Edit Letters

- Start your letter purpose with the word “Editorial” to distinguish it from other task letters
- Letters should be created in the Production Letter Family
- Use ProduXion Manager merge fields

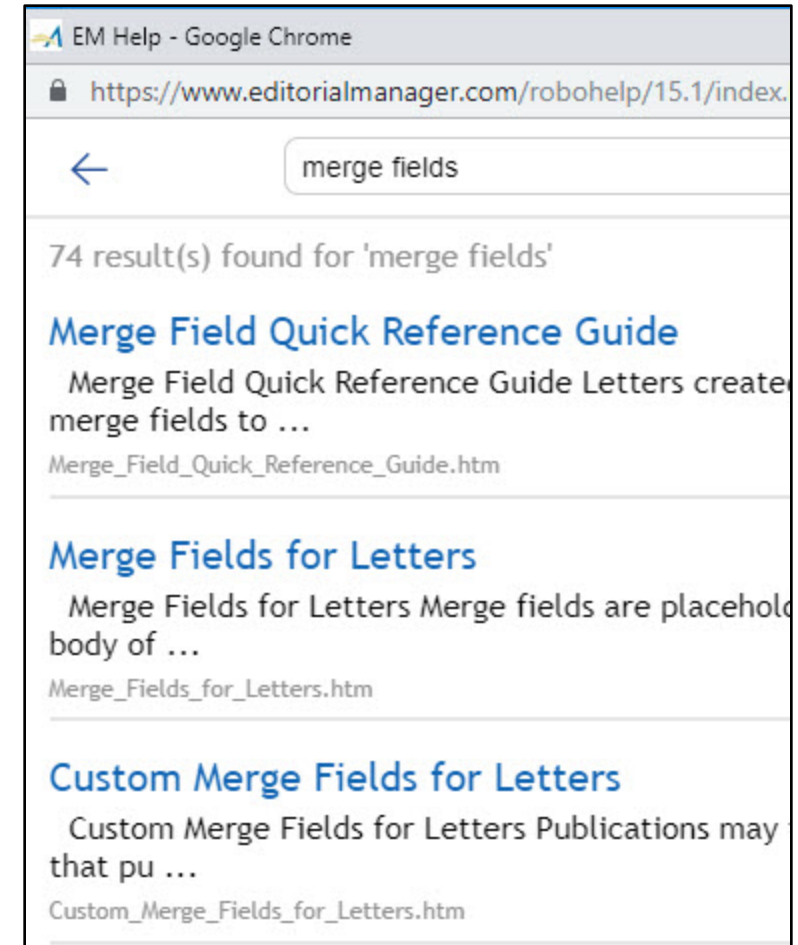
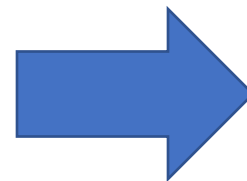
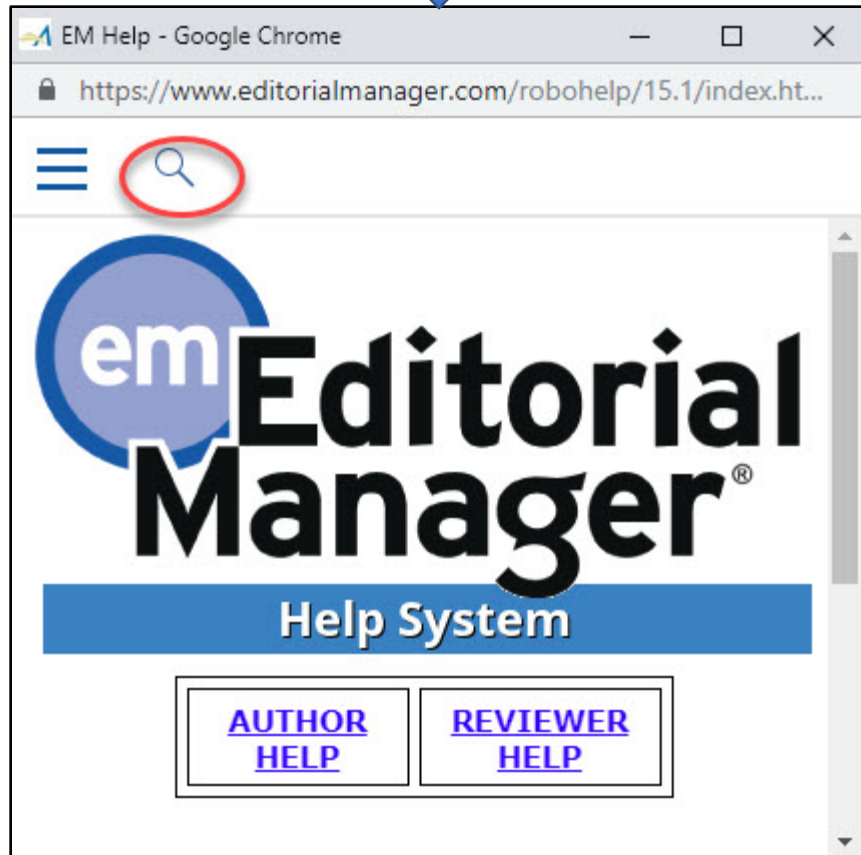
Letter Purpose:

Subject:

Letter Family:



Merge Fields Assistance: From the Help



Merge Fields Assistance: PolicyManager > Edit Letters

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		All Formats
			Text	Rich Text (HTML)	
Accept - pending minor revision	Decision		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove Hide
Author - Other Author Verification	General	Author - Notify Other Authors	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Author - Other Author Verification Reminder	Author Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide



Insert Custom Merge Field | **Insert System Merge Field**



Insert System Merge Fields

You can drag and drop merge fields from here to the letter Subject or Body. [\(more...\)](#)

Q PROD x Expand All | Collapse All

- %PROD_TASK_DEEP_LINK%
Inserts a hyperlink that fully logs the Author into EM/PM, and takes the [\(more...\)](#)
- %PROD_TASK_EDITOR_PUBLISHER_DEEP_LINK%
- %PRODTASK%
- %PRODTASK_ASSIGN_DATE%



Hydrate



PolicyManager > ProduXion Manager > Configure Submission Workflows and Production Tasks



PolicyManager > ProduXion Manager > Configure Submission Workflows and Production Tasks

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

Copy

 Edit

Your task library. Click Edit to add or edit tasks.





Edit Submission Production Task

Cancel

Submit

[Insert Special Character](#)

New Production Task Name:

Preprint Server Deposit

Maximum Production Task Name is 100 characters

- Hide** When you **Hide** a Production Task Name, the Production Task Name will be deactivated (not available for assignment).

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 all Trigger Tasks are completed (if configured in the workflow)

Task Manager Automatic Assignment Options

If this task is configured as a part of the Task Manager Workflow for an Article Type, the following events can be configured to automatically assign the task.

- Assign automatically at new submission
- Assign automatically at revision
- Assign automatically when author returns submission to publication
- Assign automatically when editor edits and approves submission

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

- End Production/Task Manager Automatically after this task is Completed



~~Batch Assignment can be triggered on either a set of submissions selected from the Search Submissions Results Production view, or all Submissions in a Schedule Group selected from the Manage Schedule Groups folder. Only tasks that are specifically configured to allow batch assignment can be used in these cases. Tasks that are configured for Assignment to 'Corresponding Author Only' cannot also be configured to Allow Batch Assignment.~~

Allow Batch Assignment

Typing text into the Custom Instructions will display an "Instructions" link when the recipient views their task assignments. Leave this field empty to suppress this link.

Production Task Custom Instructions:

[Insert Special Character](#)

Add instructions here and use the %PRODTASK_INSTRUCTIONS% merge field in the assignment letter.

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:

- Editorial Task Staff
- Managing Editor

Choose one or more of the roles that have permission to assign this task.

Can be Assigned to:

- Corresponding Author only
- Selected Editor/Publisher Roles only

Choose the role that can be assigned this task: either the Corresponding Author or one of the roles below with permission.

Only roles with the "Receive 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 to be the recipient of all such tasks assigned automatically.

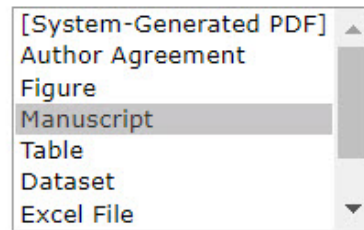
- Editorial Task Staff
- Managing Editor
- Publisher



If 'Automatically Select Files for Assignment' is enabled, files in the submission File Inventory that match the configured File Types will appear pre-selected for manual task assignment or will be automatically included when a task is 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.



[System-Generated PDF] ▲
Author Agreement
Figure
Manuscript
Table
Dataset
Excel File ▼

These are populated from PolicyManager > Submission Policies > Edit Submission Items.

Follow-on Task Assignments allow the selected editors/publishers who complete this kind of task to immediately assign another task. Remember to configure the **Can be Assigned by** permissions for the tasks you wish to follow-on from this one.

Allow follow-on Task Assignments

Allows task assignee to immediately assign another task after submitting this one.

This permission allows the task recipient to reassign the same task to another user. The recipient must have a publisher or editor role (corresponding authors may not reassign tasks), but it does not need to be one of the **Can be Assigned by** roles for this task.

Allow Recipient to Reassign

Allows assignee to reassign to someone else who can accept this task

Questionnaire Options

Use Custom Questionnaire:

None ▼



FTP Options

Submission Production Task Transmittal Method:

Secure FTP Server address
(e.g. sftp://ftp.ariessys.com[:21]):

Username

Password

Subdirectory:

Email Address (for transmittal notification):

Submission Production Task Import Profile:

Email Address (for import notification):

General Submission Production Task Export

- Allow task assignment and FTP without Assignment Files
- Include Aries Import XML file in transmittal
- FTP task without go.xml file
- Use Manuscript Number for file names

ftp://ssrn.net

transmittaltest

openaccess

demosbeta

ttask@ariestrash.com

None

XML file is required

Select Fields for Import

Credentials and
transmittal
notification email

These control what's getting sent out

These control what's coming back in

For Help:

https://www.editorialmanager.com/robohelp/15.1/index.htm#t=Submission_Production_Tasks.htm&rhsearch=FTP%20Options&rhsyns=%20



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.



← Companion file types in PolicyManager > Submission Policies > Edit Submission Items populate here.

Scheduling and Due Date Options

- Show Task in Production Status Grid
- Include this task in 'At Risk' and 'Must Start By' date display

Milestone Tasks do not require a response and automatically have the same start and end dates. Set the task to be a Milestone if you do not wish to track the duration, or wish to simply log a key milestone. Otherwise you may enter one or more Due Date calculation methods, and the earliest possible date will be used when allocating a task.

Due Date:

- 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:

Nothing expected back



Letter Options

The Letters available for this feature are those assigned to the 'Production' letter family. The letters may be customized prior to being sent. Batch Assignment Letters are only used by Task Types configured with 'Allow Batch Assignment', and only when the task is selected for Batch Assignment; when such a task is assigned as a single task, manually or automatically, the configured non-Batch Assignment Letter is used.

Allow Task Assignment without Sending Letter

Non-Batch Assignment Letter:

Editorial Task Assignment ▼

~~Batch Assignment Letter:~~

~~Please Choose a Letter ▼~~

Cancel Assignment Letter:

Please Choose a Letter ▼

Submit Task Letter:

Please Choose a Letter ▼





SURVIVOR

I told you we'd make it.

PolicyManager > ProduXion Manager > Configure Submission Workflows and Production Tasks

Workflows you
have created made
up of tasks from
your task library



Standard	
All Submission Production Tasks	Copy Edit
Custom Submission Workflows	
Task Manager Workflow	Copy Edit

[Insert Special Character](#)

New Custom Workflow Name: [Add](#)

Maximum Workflow Name is 100 characters



Add Tasks to Custom Submission Workflow

Workflow Name:

Order	Task Type (↕=Milestone)	Assign if First Task	Trigger Task(s)	Allow Repeats

[Update](#)

Please select one or more Submission Production Tasks and Add them to this workflow.


[+ Add Selection\(s\) to Workflow](#)





[Return to Configure Workflows and Tasks](#)

Choose your task(s) and click “Add Selection(s) to Workflow”.



Add Tasks to Custom Submission Workflow

Workflow Name: 

	Order	Task Type (◆=Milestone)	Assign if First Task 		Trigger Task(s) 	Allow Repeats 
	<input type="text" value="1"/>	◆Preprint Server Deposit [Edit]				

Language Edit
Copyright Check [+ Add Selection\(s\) to Workflow](#)

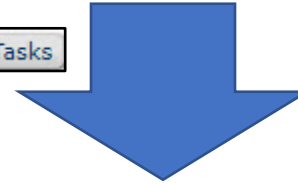
[Return to Configure Workflows and Tasks](#)



Trigger Tasks

	Order	Task Type (◆=Milestone)	Assign if First Task i		Trigger Task(s) i	Allow Repeats i
	<input type="text" value="1"/>	Language Edit [Edit]				
	<input type="text" value="2"/>	Copyright Check [Edit]			Language Edit	
	<input type="text" value="3"/>	Preprint Server Deposit [Edit]				

Return to Configure Workflows and Tasks



	Order	Task Type (◆=Milestone)	Assign if First Task i		Trigger Task(s) i	Allow Repeats i
	<input type="text" value="1"/>	Language Edit [Edit]				
	<input type="text" value="2"/>	Copyright Check [Edit]			Language Edit	
	<input type="text" value="3"/>	Preprint Server Deposit [Edit]			Language Edit Copyright Check	<input checked="" type="radio"/> No <input type="radio"/> Yes

Return to Configure Workflows and Tasks



PolicyManager > ProduXion Manager > Configure Submission Workflows and Production Tasks

Configure Submission Workflows and Tasks

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Standard

All Submission Production Tasks

[Copy](#)

[Edit](#)

Custom Submission Workflows

[Example Workflow](#)

[Remove](#)

[Copy](#)

[Edit](#)

Task Manager Workflow

[Copy](#)

[Edit](#)

[Insert Special Character](#)

New Custom Workflow Name:

Maximum Workflow Name is 100 characters

[Edit Article Types](#)
[PolicyManager Main Menu](#)



PolicyManager > Submission Policies > Edit Article Type

[-] **Submission Policies**
Edit Article Types



Production Tracking Parameters:

Use Task Manager Workflow: Task Manager Workflow

Use Submission Production Workflow: All Submission Production Tasks

Automatically set the Final Disposition to 'Accept' when the Author is notified of the selected Decisions:

Accept



Interested in Implementing Task Manager? Just to recap...

- General release of version 15.1 begins late January/early February and extends until early March.
- You should hear from your Account Coordinator soon about your tentative upgrade date.
- If you are a ProduXion Manager customer, Task Manager will be available to you as part of your upgrade to version 15.1. If you are not, contact your Account Coordinator for information and pricing





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