



Production Center Guide

ScholarOne Manuscripts™

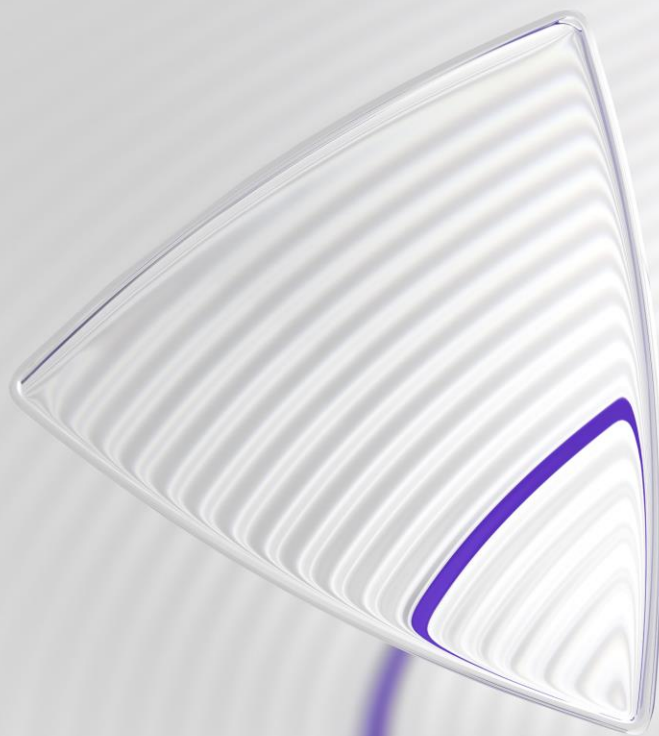


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Introduction

Admin Support - Help & Faqs

Using *ScholarOne Manuscripts* for your journal, one of your greatest help tools is our role-base support pages. The [Admin Support](#) page contains downloadable guides (such as this one), video tutorials and FAQs.

The ability to create a case to get assistance from our customer support group, can be found on the [Contact Support](#) page. We recommend that you bookmark our help pages and consult it often.


Admin Support

Read FAQs

Learn more about using *ScholarOne Manuscripts* to host the submission and peer review for your journal portfolio through video tutorials, user guides, and FAQs. Our resources are designed to help you configure your journals, assign roles and permissions, and customize your sites via *ScholarOne Manuscripts*.

Ready to learn more? Visit our [Training Portal](#) for a variety of resources designed just for admins, or [register for live training](#).

Still need help? [Contact ScholarOne Product Support](#).



View the Admin Guide

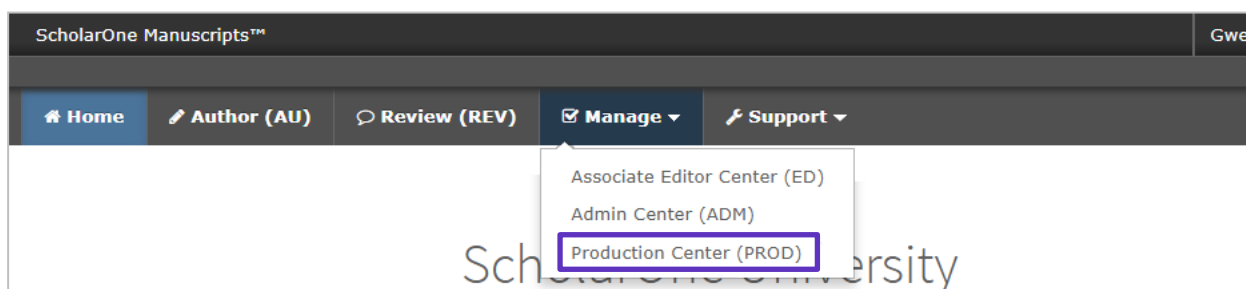
English | Chinese | French | Japanese | Portuguese | Spanish

Site Configuration and This Document

ScholarOne Manuscripts is configured for your specific site based on the needs of the journal or publisher. The role names and fields used in this document may differ from your site. The essential functions will be the same; however, you may not have some of the configurable options available to you

Home Page

When you log into the site, the home page displays. This page provides links to all centers you have access to, as well as supporting actions and information. The look of the home page is customizable by each journal, so you may also see images, links, and text with journal-specific information.



Centers

Centers for each role you have access to display here. Each center contains the functions specific to that role.

Resources

This section contains links to helpful resources.

- **Instructions & Forms:** Journal-specific links and documents for download
- **User Tutorials:** Access to author and reviewer user guides, PDF “quick guides”, and links to the Education and Support portal
- **System Requirements:** Information on operating system/browser requirements and links to required software downloads
- **Home Page:** Direct link to the journal/publisher website.
- **Switch to a different publication:** In addition, journals configured to share a database (“portal sites”) can jump to another journal by choosing from a dropdown menu that will be displayed here.

The Production Center

The Production Center is part of the standard ScholarOne Manuscripts implementation. The Production Center is where all accepted papers are relocated so they can be prepared for publication. The Production Center is also a place that can be used to export submissions to the publisher, using an FTP site, SFTP site or email address. It can also be used for in-house exports for independent publishers or journals.

Dashboard

You can access manuscripts in each peer review status by clicking on the status queue title. The number next to each status queue title indicates the number of manuscripts in that status. You may search for specific manuscripts with the Quick Manuscript Search form or conduct an "Advanced Search" by clicking the link below (the advanced search form will display at the bottom of the screen). For tips on conducting searches, click the following link: [Read More...](#)

Production Editor Lists

You may click on the manuscript list title to view a full listing of manuscripts in each status, or click on the number next to the list to jump directly to the first manuscript in the list.

[1 Awaiting Production Checklist](#)
[0 Awaiting Assignment to Batch](#)
[0 Assigned to Batch - Awaiting Export](#)

Quick Search - [Show Advanced Search](#)

You may conduct a wildcard search by adding an asterisk (*) to the end of the search string. For example, to view a list of all of the manuscripts whose titles begin with the words "neuroscience" or "neurology" simply type "neuro*" in the Title field and click "Search."

Saved Search: [Edit](#)
Manuscript ID:
Title:
Author's First (Given) or Last (Family) name:
* Keywords: ☒ Pick

[Search](#)

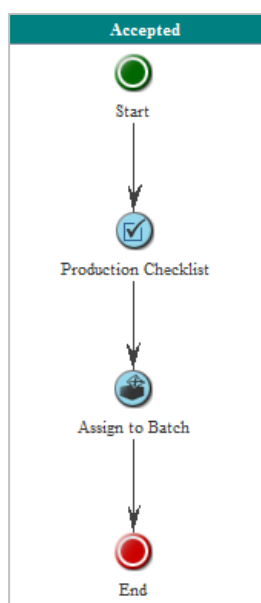
Production Editor Tools

[Exports](#)
[Batch](#)
[Marked - Not Assigned](#)
[History](#)
[Issue Management](#)

The Production Center is very similar to the Admin Center. It has the **Lists** and **Quick Search** sections. The one difference is the **Production Editor Tools** section below the manuscripts lists. The tools include **Exports** and **Issue Management**.

The Accepted Workflow

The Accepted Workflow is triggered post-acceptance. It provides functionality for post-acceptance checklists and exports. Generally, when a manuscript is accepted, it enters a Production Checklist (or checklists), in which the Production Editor will verify the manuscript is ready for publication. After the Production Checklist, the manuscript is then assigned to an available batch for export to an off-site production location, which is then exported per the configuration of the batch.



Preparing And Approving a Paper for Export

Upon acceptance of a manuscript, a Production Checklist task opens. In order for a paper to be exported, the person within the role of Production, (often the Admin), will need to check a few items before exporting the paper from the system. Depending on the site, there may be an opportunity for the Production Editor or the Admin to complete the checklist.

The following are suggested steps you can take to ensure that your paper is ready to be exported from the system:

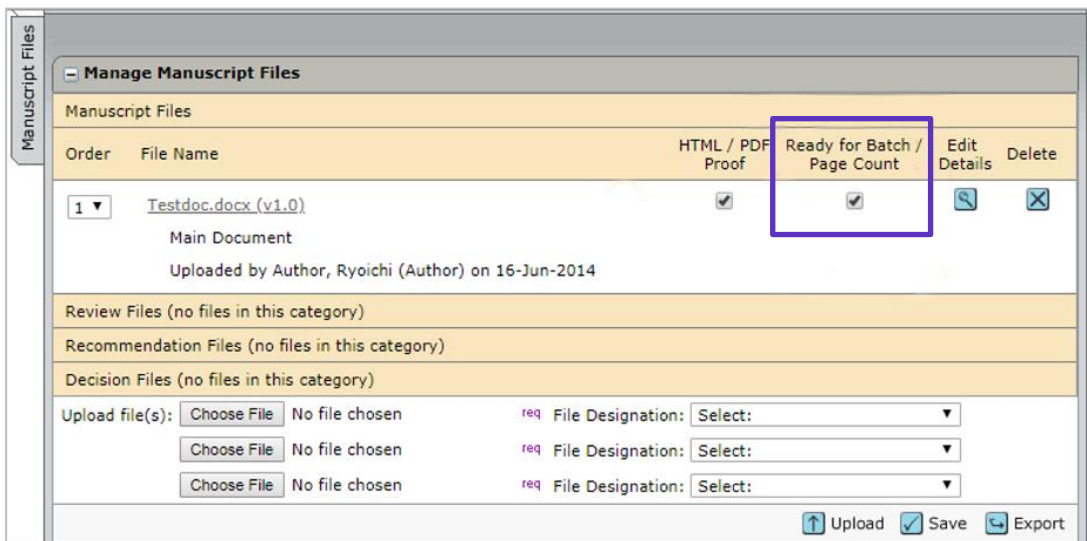
1. Take Action – Select **View Details** to go to the Manuscript Information tab.

Complete Production Checklist					
Manuscripts 1-4 of 4					
Manuscript ID	Manuscript Title	Decision Date	Status	Take Action	Ready for Batch
Manuscript Type	Submitting Author				
MCU1-201911-0003-OA	test title [View Submission]	12-Nov-2019	<ul style="list-style-type: none"> Accept (12-Nov-2019) Complete the Production Checklist (Due 12-Dec-2019) 880 days overdue Track Form 0 of 1 completed 	<div> Select... Select... View Details View Manuscript Files View Audit Trail Forms Tracking Production Checklist </div>	<input type="checkbox"/>
Original Article	Author: Arlene (contact)				

2. Manuscript Information tab - Under **Author-Supplied Data**, check that all author information, title, abstract, and custom question responses are correct. Select the **Edit This Information** icon if you need to make any corrections.

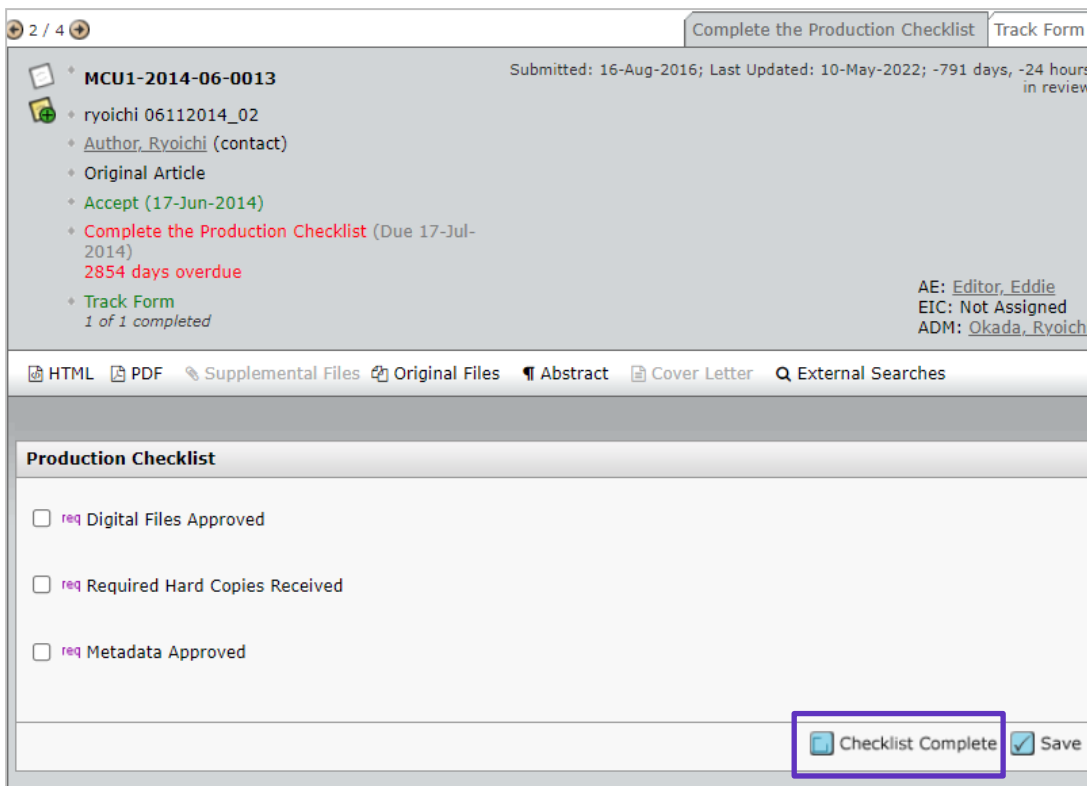
Author-Supplied Data	
Manuscript Type:	Original Article
Title:	test title
Manuscript ID:	MCU1-201911-0003-OA
Funding Information:	Foundation for the National Institutes of Health
Submitting Author:	<div> Author, Arlene <input type="checkbox"/> Save Author, Arlene </div> <div> <ul style="list-style-type: none"> primary affiliation Tamkang University - Library Department Tamsui Taipei Taiwan 23159 Taiwan T: 25004875 secondary affiliation 淡江大學 - 教資系 </div>
Authors & Institutions:	<div> Author, Arlene Corresponding Author </div> <div> <ul style="list-style-type: none"> UVA ✓ Charlottesville, Virginia United States Iowa State University ✓ Ames, Iowa United States </div>
Contact Author (populates the ##PROLE_AUTHOR_.,## e-mail tags):	<div> Author, Arlene <input type="checkbox"/> Save </div> <div>Current Contact Author: Author, Arlene</div>
Running Head:	rh
Keywords:	Molecular Biology, sdjsdvdjdp ✖
Author Recommended Reviewers:	Rajesh Reviewer UVA ✓ - rev@mailinator.com, expert
Author Opposed Reviewers:	
Author Recommended Editors:	
Author Opposed Editors:	
Author's Cover Letter:	
Custom Questions:	Show
<div> Edit This Information <input checked="" type="checkbox"/> Save </div>	

3. **Manuscript Files tab** - Verify all files to be exported have the **Ready for Batch/Page Count** box checked.



The screenshot shows the 'Manage Manuscript Files' interface. A table lists manuscript files with columns: Order, File Name, HTML / PDF Proof, Ready for Batch / Page Count, Edit Details, and Delete. The 'Ready for Batch / Page Count' checkbox for the first file, 'Testdoc.docx (v1.0)', is checked and highlighted with a red box. Below the table, there are sections for 'Review Files', 'Recommendation Files', and 'Decision Files', all showing 'no files in this category'. At the bottom, there are upload and file designation options, and buttons for 'Upload', 'Save', and 'Export'.

4. **Production Checklist** - Once all items are verified as correct, go to the Production Checklist task-related tab to complete the checklist.



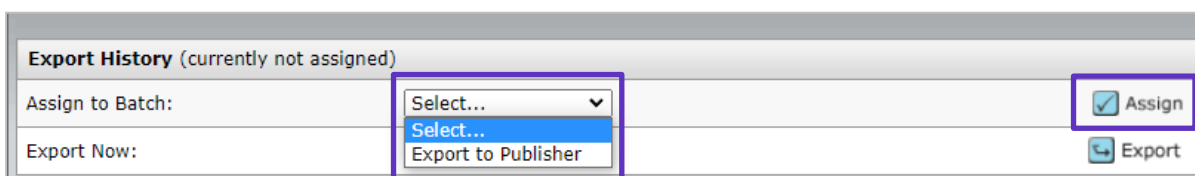
The screenshot shows the 'Production Checklist' interface. It includes a header with the manuscript ID 'MCU1-2014-06-0013' and submission details. A list of tasks is shown, including 'Complete the Production Checklist' which is marked as 'Due 17-Jul-2014' and '2854 days overdue'. The 'Checklist Complete' button is highlighted with a red box. At the bottom right, there are buttons for 'Checklist Complete' and 'Save'.

Assigning Papers to a Batch

After completing the Production checklist, the manuscript will need to be assigned to a batch for export. There are multiple ways this process can be completed.

Assigning To Batch Individually

Select the desired batch in the **Assign to Batch** drop down menu and click **Assign**.

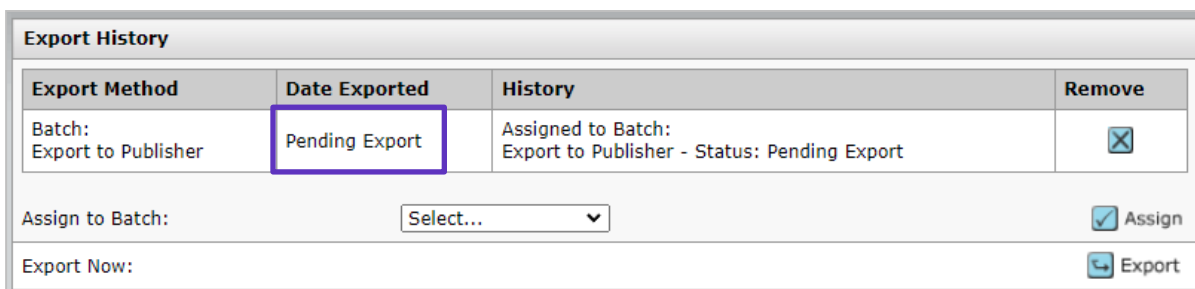


Export History (currently not assigned)

Assign to Batch: Select... Assign

Export Now: Select... Export to Publisher Export

Once this is done, the export history will say **Pending Export**. Exports are sent from the system based upon the time of when the export was assigned to the export queue and may not appear completed until the next day.



Export History



Export Method	Date Exported	History	Remove
Batch: Export to Publisher	Pending Export	Assigned to Batch: Export to Publisher - Status: Pending Export	

Assign to Batch: Select... Assign

Export Now: Export

Assigning To Batch En Masse

In any of the Production Editor Lists, check the **Ready for Batch** box beside the manuscripts you would like to assign to batch.

Complete Production Checklist					
Manuscripts 1-3 of 3					
Manuscript ID	Manuscript Title	Decision Date	Status	Take Action	Ready for Batch
Manuscript Type	Submitting Author				
MCU1-201911-0003-OA	test title [View Submission]	12-Nov-2019	AE: Editor, Amy EIC: Cooney, Jane ADM: Visokay, Alison • Accept (12-Nov-2019) • Complete the Production Checklist (Due 12-Dec-2019) 880 days overdue • Track Form 0 of 1 completed	Select...	<input checked="" type="checkbox"/>
Original Article	 Author, Arlene (contact)				
MCU1-2013-07-0010	Migration Patterns of the Cardinal [View Submission]	10-Jul-2015	AE: Editor, Emily EIC: Not Assigned ADM: Cooney, Jane • Accept (10-Jul-2015) • Complete the Production Checklist (Due 09-Aug-2015) 2466 days overdue • Track Form 1 of 1 completed	Select...	<input type="checkbox"/>
Original Article	 Anderson, Alan (contact)				

Then go into the **Marked – Not Assigned** queue under the **Tools** section, select the batch for each manuscript, and click **Save**.

Production Editor Tools

Exports

[Batch](#)

[Marked - Not Assigned](#)


[History](#)

[Issue Management](#)

Results - New Search

Manuscripts 1-1 of 1

Search Criteria: Marked for Export = "Yes"; Status = "In Production Workflow"

Manuscript ID	Manuscript Title	Decision Date	Status	Batch Selection
Manuscript Type	Authors			
MCU1-201911-0003-OA	test title [View Submission]	12-Nov-2019	AE: Editor, Amy EIC: Cooney, Jane ADM: Visokay, Alison • Accept (12-Nov-2019) • Complete the Production Checklist (Due 12-Dec-2019) 880 days overdue • Track Form 0 of 1 completed	Select... Select... Export to Publisher
Original Article	 Author, Arlene (contact)			

[Export to CSV](#)
[Save](#)

Manuscripts 1-1 of 1

Automatic Batch Assignment

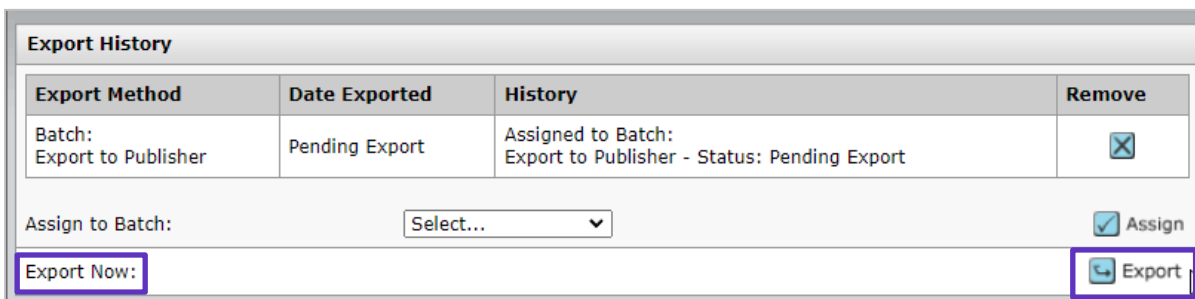
Sites have the option to have manuscripts assigned to a batch or batches automatically upon completion of the production checklist task. Once this has occurred, the manuscript will be placed directly in the Awaiting Export queue. If you would like this option activated, created a case Customer Support for the Client Solutions team, with the batch or batches you would like automatically assigned.

Note: You can assign a manuscript to more than one batch if configured, just select another batch from the drop-down menu.

Bypass Batch Export

If you have already successfully done a local manual export, using the **Export Now** option, and would like to close out the batch assignment, you can do a bypass batch export. Please note that this option is configurable and may need to be set up by Client Solutions.

To bypass a batch assignment, click the Export icon on the active Batch tab or from the Manuscript Files tab (if available).



Export History

Export Method	Date Exported	History	Remove
Batch: Export to Publisher	Pending Export	Assigned to Batch: Export to Publisher - Status: Pending Export	

Assign to Batch: ☒ Assign

Export Now: **Export**

In the Export pop-up window, check the box beside the batch or batches you would like to bypass. You can either select **Bypass All** or **Bypass the following specific batch(s)**. Once you have made your selections, click Export at the bottom right of the screen.

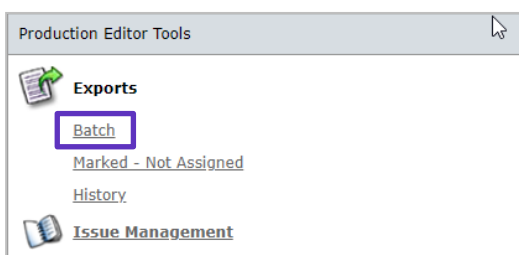
Export - Manuscript ID: MCU1-2014-06-0013
Bypass batch process
Bypass all <input type="checkbox"/> Remove from any current assigned batches and mark as 'Export Complete' Bypass the following specific batch(es) <input type="checkbox"/> Export to Publisher (manuscript is currently assigned to this batch)
Select a pre-defined export target
Export Target: <input type="radio"/> Export to Publisher <input type="radio"/> old papers <input type="radio"/> Export to Publisher
or define a new export target
<input checked="" type="radio"/> Location Specified Below:
Export Name: <input type="text"/>
<input checked="" type="radio"/> Files & Metadata (zip file with metadata, manifest, DTD (if applicable), and files marked for export) <input type="radio"/> Metadata Only (zip file with metadata, manifest, and DTD (if applicable)) <input type="radio"/> Original Files & Metadata (zip file with metadata, manifest, DTD (if applicable) and only original files marked for export. The PDF Proof is not included) <input type="radio"/> Single file (xml, html, or csv) only <input type="radio"/> Single file (xml, html, or csv) only & PDF proof - First Look sites only <input type="radio"/> Metadata & Files (xml metadata file and zip file containing article files marked for export)
Location: Select Location: <input type="text" value="Local"/> ▼

Batches



A batch holds a group of accepted manuscripts that are set to export at the same point in time. It is configured in the Production Center to send the files and/or the metadata of the assigned paper from ScholarOne Manuscripts to a particular server or email address on a specific date or frequency. After completing the Production Checklist, the Production Editor is responsible to assign these manuscripts to a batch.

Batch Configuration

It is helpful to see how the batch is set up. To access existing batches and/or to create a new batch, under **Production Editor Tools** go to the **Exports** section and select **Batch**.




Existing batches will be displayed at the top of the page, and are usually created for you during the implementation process of your site. Clicking **Edit** beside any of these will open the batch configuration in the **Add a Batch** box immediately below.

Name	Timing	Target	Edit	Delete
Export to Publisher	Daily	Export to Publisher	 Edit	 Delete

Add a Batch

Name of Batch:

Archive exports are sent on a daily basis regardless of the settings selected below

Timing: ☐ on 

☐ Weekly (on Sundays)

☐ Monthly (on the of every month)

☐ Daily

☐ Within 24 hours of when the total number of manuscripts=

Target

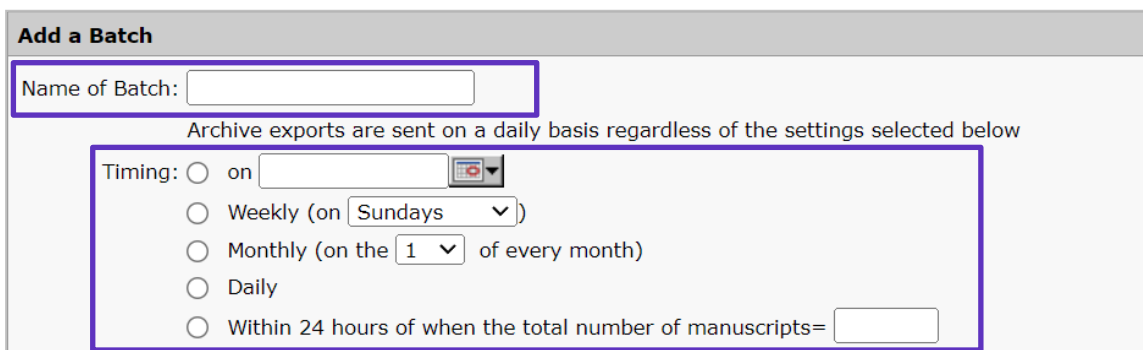
☐ Export to Publisher ☒ Location Specified Below:

Export Name:

If Edit is not clicked beside an existing batch, the Add a Batch section will be blank, and will allow you to create a new batch.

When creating a new batch, you will need to fill out the following information:


1. **Name of Batch** and define the **Timing** of the batch.



Add a Batch

Name of Batch:

Archive exports are sent on a daily basis regardless of the settings selected below

Timing: ☐ on 

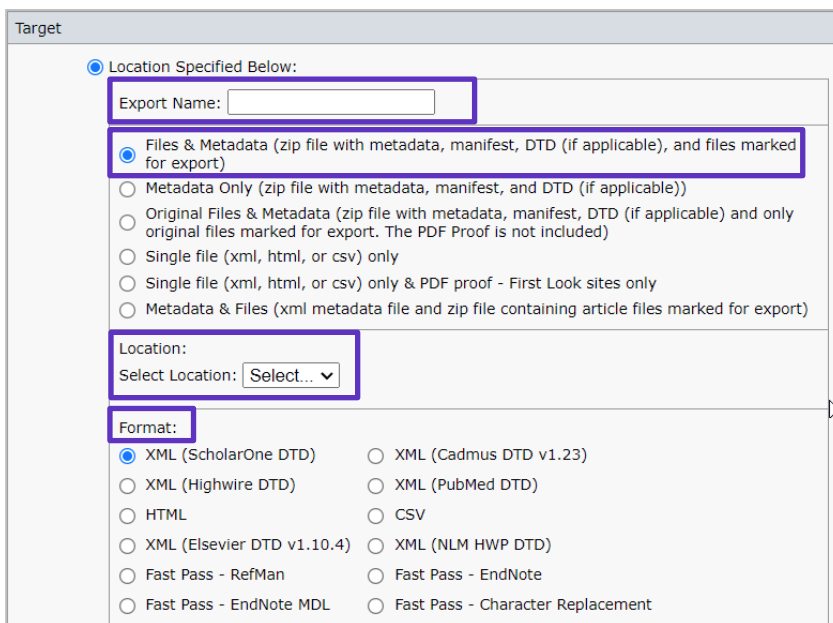
☐ Weekly (on Sundays)

☐ Monthly (on the 1 of every month)

☐ Daily

☐ Within 24 hours of when the total number of manuscripts=

2. **Target**, you determine the **Export Name** of the target, what is included in the export from each manuscript, the **Location** of the batch, and the **Format** of the metadata.



Target

☒ Location Specified Below:

Export Name:

☒ Files & Metadata (zip file with metadata, manifest, DTD (if applicable), and files marked for export)

☐ Metadata Only (zip file with metadata, manifest, and DTD (if applicable))

☐ Original Files & Metadata (zip file with metadata, manifest, DTD (if applicable) and only original files marked for export. The PDF Proof is not included)

☐ Single file (xml, html, or csv) only

☐ Single file (xml, html, or csv) only & PDF proof - First Look sites only

☐ Metadata & Files (xml metadata file and zip file containing article files marked for export)

Location:

Select Location: Select...

Format:

☒ XML (ScholarOne DTD) ☐ XML (Cadmus DTD v1.23)

☐ XML (Highwire DTD) ☐ XML (PubMed DTD)

☐ HTML ☐ CSV

☐ XML (Elsevier DTD v1.10.4) ☐ XML (NLM HWP DTD)

☐ Fast Pass - RefMan ☐ Fast Pass - EndNote

☐ Fast Pass - EndNote MDL ☐ Fast Pass - Character Replacement

3. **Available** is setting when you can use the export. Once you have selected your desired options, click Add.

Available:

☒ Always

☐ When Production Checklist is complete.

☐ Send export manifest (include all manuscripts since the last succesful manifest export)

 Please check with your publisher to ensure this CSV file can be accepted by their production departments.

☐ Include the PDF at the root directory with the XML. This will move the PDF to the root directory and will not be nested inside the PDF folder.

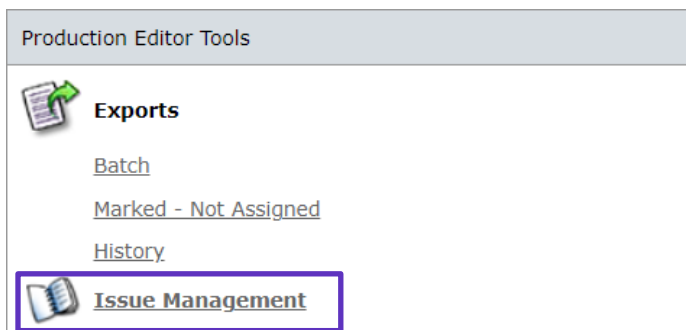
Add

If you create a batch that will be sending to an E-Mail address, be sure you have an active email template located in the System Emails, Misc. Event-Driven E-Mails.

Misc. Event-Driven E-Mails	Edit Before Sending	iCal	Active	Modify	Delete	Updated
req Conversation Participant Notification - add template						
Notify Conversation Participant	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			09-October-2019
Author Approval of Transfer Manual Reminder - add template						
Request to transfer your manuscript	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			28-August-2013
req Manuscript exported via email - add template						
Manuscript Exported Via E-Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			11-April-2013







Issue Management

Issue Management allows you create electronic versions of an issue and assign papers to those issues. This can be done before or after a hard copy of an issue has been created. It can also be used just to keep track of special issues. This feature provides an electronic record of your issues.



Select the **Issue Management** link from the dashboard to be taken to the **Issue List**. This is where you manage and create new issues. The following options are available from the Issue List:

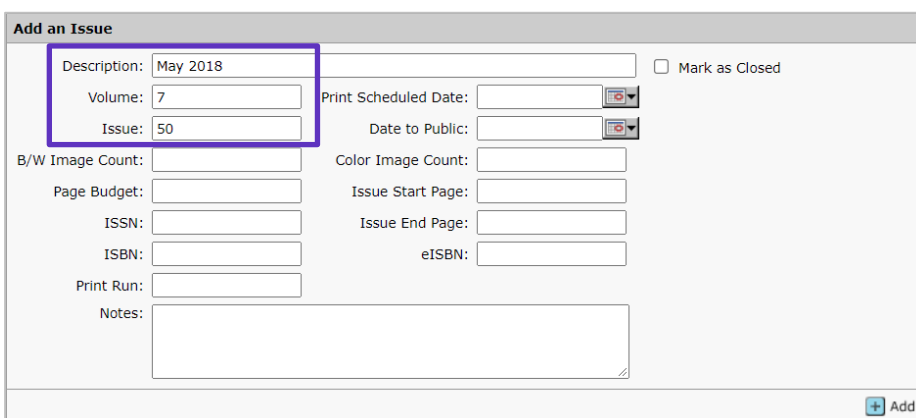
- **View/Edit Lineup** - Where you will see all the manuscripts assigned to the issue in a specific order.
- **Edit Issue** - Allows you to edit the issue-related fields.
- **Delete Issue**

Issue List - contains 2 issues				1-2 of 2		
Search Criteria: All Issues				Issue: All Issues		
Volume, Issue, Description	# Pages in Issue (budget / actual)	# Manuscripts Assigned	View / Edit Lineup	Edit Issue	Delete Issue	
178 149877 Special Issue 2015.	0 / 1.0 ISSN: ISBN: eISBN: Issue End Page: Print Run:	0				
07 2014 July 2015.	0 / 0.0 ISSN: ISBN: eISBN: Issue End Page: Print Run:	0				

Creating An Issue

To create a new issue, scroll down to the bottom of the Issue List, to the Add an Issue section. The following items are suggested for issue creation, the rest are optional:

- Description
- Volume Number
- Issue Number



Add an Issue

Description: May 2018 ☐ Mark as Closed

Volume: 7 Print Scheduled Date:

Issue: 50 Date to Public:

B/W Image Count: Color Image Count:

Page Budget: Issue Start Page:

ISSN: Issue End Page:

ISBN: eISBN:

Print Run:

Notes:

Once you have added the required elements and any desired optional elements, click the **Add** button. You can edit an issue after creation if you want to add or edit elements at a future date.

Assigning Papers to an Issue

To add papers to a specific issue, select **View/Edit Lineup**. The Advanced Search option will have all accepted decision types highlighted by default so your search results will only bring back accepted papers. Select your search options and click Search.

Advanced Search

Decision Type:

- Accept (ORIG - Final Decision)
- Accept (RES - Final Decision)
- Accept (REV - AE Decision)

Issue:

- ☒ issue assignment not considered.
- ☐ not assigned to an issue.
- ☐ assigned to an issue

Volume: Issue:

Manuscript Type:

Manuscript ID:

Title:

Running Head:

ISSN:

Issue End Page:

Print Run:

Search Across

- ScholarOne University Training Sites
- ScholarOne University Training Workflow 1
- ScholarOne University Training Workflow 4

Keywords: ☒ Pick

Author's First (Given) or Last (Family) name:

Co-Author Last (Family) Name:

Tip: Change the **Issue** section of the Advanced Search to “not assigned to an issue” to avoid adding a paper to more than one issue.

In the search results, check the box under the **Use This Paper** column beside the manuscripts you would like to add to the issue, then click on **Add Selections from this Page** at the bottom of the results.

Volume: 2017 , Issue 073168 (contains 0 papers)
0 pages budget / 0.0 pages actual

There are no manuscripts assigned to this issue

Search results (1 found)
1-1 of 1

Manuscript ID	Manuscript Title & Authors	Status	Use This Paper
MCU1-2013-05-0007	Letter to the Editor [View Submission]	<ul style="list-style-type: none"> Accept (10-Jul-2015) Complete the Production Checklist (Due 09-Aug-2015) 2469 days overdue Track Form 0 of 1 completed Decision Date 10-Jul-2015 	<input type="checkbox"/>
Letter to the Editor	Anderson, Alan		

Once the selections are added, then additional options can be chosen, such as changing the order of the papers and adding a page count. You can also access the actual manuscript by

clicking the Details / Edit button. If you need to unassign a manuscript from the issue, click the Remove button.

Volume: 178 , Issue 149877 (contains 2 papers)		0 pages budget / 0.0 pages actual			
Order	Manuscript ID	Status	# Pages	Details / Edit	Remove
1	MCU1-2013-05-0007 Letter to the Editor [View Submission] • Author, Alan (contact) • Manuscript Type: Letter to the Editor	<ul style="list-style-type: none"> Accept (10-Jul-2015) Complete the Production Checklist (Due 09-Aug-2015) Track Form 0 of 1 completed vol:178, iss:149877 Decision Date 10-Jul-2015 	est: 0.00 act: 0.0		
2	MCU1-2013-07-0010 Migration Patterns of the Cardinal [View Submission] • Author, Alan (contact) • Manuscript Type: Original Article	<ul style="list-style-type: none"> Accept (10-Jul-2015) Complete the Production Checklist (Due 09-Aug-2015) Track Form 0 of 1 completed vol:178, iss:149877 Decision Date 10-Jul-2015 	est: 0.00 act: 0.0		

Export Lineup Save






Note: The estimated page count calculation (est) may not be active on the site. If you would like this activated, contact Client Solutions.

Placeholders

Placeholders for items such as the cover page, editorials and advertisements can also be added into an issue. Be sure to specify if the placeholder is going to be in **Color** or **Black and White**, and if it is going to be starting on the **Front of Page** or the **Back of Page**.






Add a Placeholder	
Name <input type="text" value="Cover Page"/>	Number of Pages: <input type="text" value="1"/>
<input checked="" type="radio"/> Color <input type="radio"/> Black & White	
<input checked="" type="radio"/> Front of Page <input type="radio"/> Back of Page	
Comments <input type="text"/>	
Add	

After a placeholder is added, the manuscript order within the issue may need to be changed to move the placeholder in the correct position.

Volume: 2017 , Issue 073168 (contains 1 papers)					0 pages budget / 1.0 pages actual	
Order	Manuscript ID	Status	# Pages	Details / Edit	Remove	
1	MCU1-2013-07-0010 Migration Patterns of the Cardinal [View Submission] • Anderson, Alan (contact) • Manuscript Type: Original Article	<ul style="list-style-type: none"> Accept (10-Jul-2015) Complete the Production Checklist (Due 09-Aug-2015) 2469 days overdue Track Form 1 of 1 completed vol:2017, iss:073168 Decision Date 10-Jul-2015 	est: 0.00 act: 0.0			
2	Placeholder: Cover Page - Color - Front		1			
1						
2						
						<input checked="" type="checkbox"/> Save

Exporting Issue Lineups

After an issue is created, an exported Issue Lineup can be made. This can be used as a Table of Contents.

Volume: 2017 , Issue 073168 (contains 1 papers)					0 pages budget / 1.0 pages actual	
Order	Manuscript ID	Status	# Pages	Details / Edit	Remove	
1	Placeholder: Cover Page - Color - Front		1			
2	MCU1-2013-07-0010 Migration Patterns of the Cardinal [View Submission] • Anderson, Alan (contact) • Manuscript Type: Original Article	<ul style="list-style-type: none"> Accept (10-Jul-2015) Complete the Production Checklist (Due 09-Aug-2015) 2469 days overdue Track Form 1 of 1 completed vol:2017, iss:073168 Decision Date 10-Jul-2015 	est: 0.00 act: 0.0			
						<input checked="" type="checkbox"/> Save

To Export an Issue Lineup:

- Click the **Export Lineup** icon located at the bottom of the issue.
- Go to, **or define a new target**, and set the following criteria for your table of contents:
 - Export Name
 - Issue Lineup Only (CSV)
 - Location: **Local**

- Format: **CSV**
- Select the **Export** icon to start with the creation of the CSV.

or define a new export target

☒ Location Specified Below:

Export Name:

☐ Files & Metadata (zip file with metadata, manifest, DTD (if applicable), and files marked for export)
☐ Metadata Only (zip file with metadata, manifest, and DTD (if applicable))
☐ Original Files & Metadata (zip file with metadata, manifest, DTD (if applicable) and only original files marked for export. The PDF Proof is not included)
☒ Issue Lineup Only (CSV)
☐ Single file (xml, html, or csv) only & PDF proof - First Look sites only
☐ Metadata & Files (xml metadata file and zip file containing article files marked for export)

Location:
Select Location:

Format:

☐ XML (ScholarOne DTD) ☐ XML (Cadmus DTD v1.23)
☐ XML (Highwire DTD) ☐ XML (PubMed DTD)
☐ HTML ☒ CSV
☐ XML (Elsevier DTD v1.10.4) ☐ XML (NLM HWP DTD)
☐ Fast Pass - RefMan ☐ Fast Pass - EndNote
☐ Fast Pass - EndNote MDL ☐ Fast Pass - Character Replacement

Available:

☒ Always
☐ When Production Checklist is complete.

Once the export finishes, click the link to download it to your computer. You will now have an excel sheet that you can add additional columns of information to and send to the EIC or Publisher.

Export - Volume: 2017 - Issue: 073168

Exported to file 2017-073168-20220513065423-IssueLineUp.csv
[Download export package](#)

Export History

Date	Target	Format
13-May-2022	Issue Lineup Export	CSV
28-Feb-2017	Issue Lineup Export	CSV

A	B	C	D	E	F	G	H	I	J	K	L	M	N	
Order	Manuscript	Manuscript	Custom Q	Manuscript	Authors	Status	Decision	#	Est. Page	#	Act. Page	Notes	Web Publ	Print Publish Date
1				Cover Page - Color - Front					1"					
2	MCU1-201	Original A	Manuscript	Migration	Anderson	AE:	10-Jul-15		0		0			

Additional Options for The Production Center

New Roles

Accepted papers often need to be worked on by different people before they are turned into printed material. By adding additional tasks into the Production Center workflow, you can set up tasks and centers for new roles. Examples of additional roles are Typesetter, Language Editor and Copy Editor.

To add new roles to your site and additional tasks to your Accepted workflow, contact the Client Solutions team.

E-Forms

Electronic Forms (E-Forms) can be collected upon acceptance electronically through ScholarOne Manuscripts. These forms can be any type of form that needs to be collected from the Corresponding Author and/or all of the Authors of a paper, based on the site's configuration. E-Forms can be added by our Client Solutions Team.

Note: The collection of E-Forms is not limited to the accepted workflow and can be added to other workflows.

There are two tasks associated with E-Forms: A Forms Completion task and a Forms Tracking task. The Forms Completion task is completed by the Author, where they upload or complete an online form. The Forms Tracking task is completed by the Production Editor, where the completed forms are verified as submitted correctly.

Production Editor Lists

You may click on the manuscript list title to view a full listing of manuscripts in each status, or click on the number next to the list to jump directly to the first manuscript in the list.

- 2 [Awaiting Forms Completion](#)
- 2 [Awaiting Forms Approval](#)
- 1 [On-Hold Forms](#)
- 3 [Complete Production Checklist](#)
- 0 [Assign to Batch](#)
- 1 [Assigned to Batch - Awaiting Export](#)

Once the form is sent to the Author, it is found in their **Manuscripts with Decisions** queue, under the **Actions** column beside the accepted manuscript. Upon clicking the **Copyright Form** link, the Author is taken to the form to complete it. After submission, the HTML form will be converted to PDF.

Author Dashboard

- 2 Submitted Manuscripts
- 4 Manuscripts with Decisions
- 1 Manuscripts I Have Co-Authored
- 1 Invited Manuscripts
- Start New Submission
- 5 Most Recent E-mails
- English Language Editing Service

Manuscripts with Decisions

ACTION	STATUS	ID	TITLE	SUBMITTED	DECISIONED
Copyright Form	ADM: Visokay, Alison	MCU1-201911-	test title	12-Nov-2019	12-Nov-2019

Copyright assignment agreement

I/We hereby assign world-wide copyright of the article named above (the Work) in all forms of media, whether now known or hereafter developed, to the publisher, MCU. I/We understand that MCU will act on my/our behalf to publish, reproduce, distribute and transmit the Work and will authorise other reputable third parties (such as document delivery services) to do the same, ensuring access to and maximum dissemination of the Work. This assignment of copyright to MCU is done so on the understanding that permission from MCU is not required for me/us to reproduce, republish or distribute copies of the Work in whole or in part. I/We will ensure that all such copies carry a notice of copyright ownership and reference to the original Journal publication. I/We warrant that the Work has not been published before in its current or a substantially similar form and is not under consideration for another publication, does not contain any unlawful statements and does not infringe any existing copyright. I/We warrant that "proof of consent" has been obtained for studies of named organisations and people. All authors have received a final version of the Work, take responsibility for the content and agree to its submission. I/We also warrant that I/We have obtained the necessary permission from the copyright holder/s to reproduce in the article, in all media in all countries, and transmit via all reputable third parties, any materials including tables, diagrams or photographs not owned by me/us. (Please attach any permission documents.) I/We assert my/our moral rights to be identified as the author/s of the Work, in accordance with Sections 77 and 78 of the Copyright, Designs and Patents Act 1988. I/We acknowledge that MCU will ensure fair and faithful representation of my/our Work in all media and will take the necessary steps to protect the Work from unlawful copying.

☒ By clicking here you agree to the terms and conditions detailed above

req Date 01-Jan-2018

☒ Save as Draft ☒ Submit

Once the form is submitted by the Corresponding Author and/or all authors, the Production Editor can then verify they were completed correctly on the Forms Tracking task, by clicking the PDF or HTML links.

Inv

If the form is not completed correctly and the author needs to update it, click the **rescind** link. This places the form back in the Author Center for editing and resubmission.

If the forms have not been completed, or need additional information, but the manuscript needs to continue on past the forms tracking task, click the **Skip for Now** button. This places the forms On Hold for completion while other actions are taking place on the manuscript.

First Look

First Look can be used in two different ways: First, it allows the Author view and approve the PDF of their accepted paper prior to publication.

Production Editor Lists

You may click on the manuscript list title to view a full listing of manuscripts in each status, or click on the number next to the list to jump directly to the first manuscript in the list.

- [1 Awaiting First Look](#)
- [0 Awaiting Author Updates](#)
- [0 Awaiting Author Update Approval](#)
- [3 Awaiting Production Checklist](#)
- [1 Awaiting Assignment to Batch](#)
- [0 Assigned to Batch - Awaiting Export](#)

Second, it allows the author to make additional changes for future publication without creating revisions in the system. The journal can create instructions that can be emailed to the Author when they send the accepted paper back to them for changes. They can also bypass the task if no changes are needed. This option can be added by our Client Solutions Team.

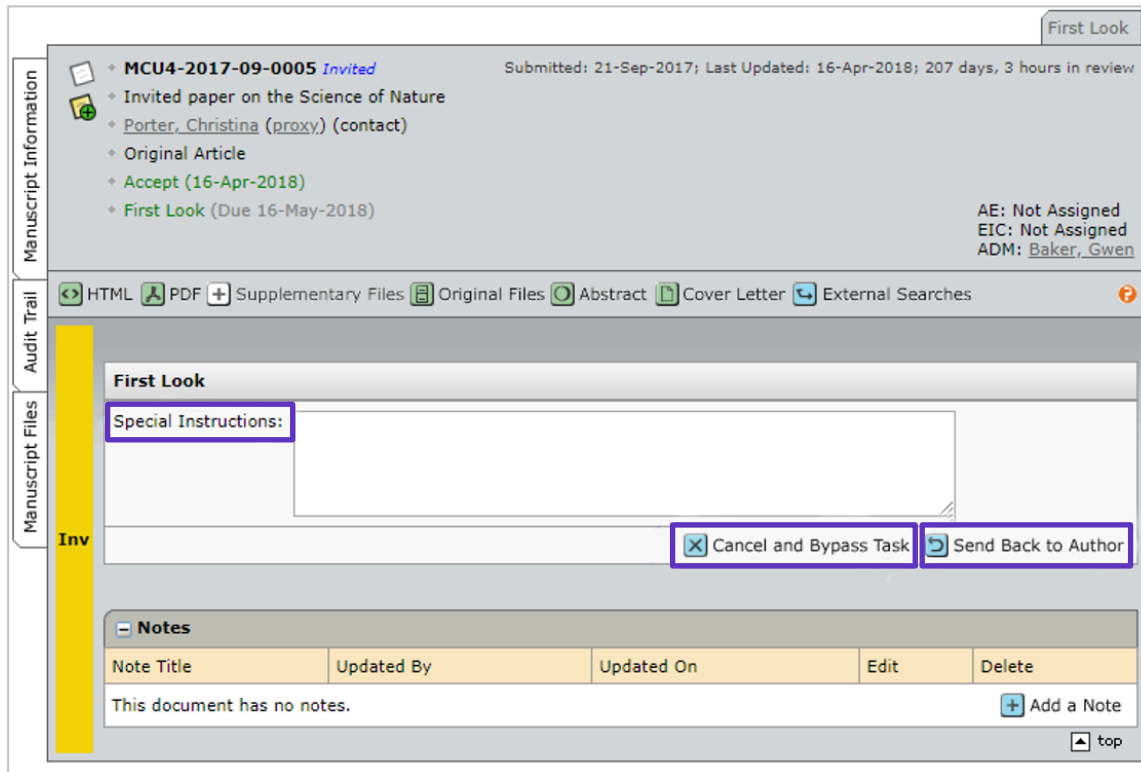
Author Dashboard

- [1 Manuscripts Accepted for First Look](#)
- [Start New Submission](#)
- [5 Most Recent E-mails](#)
- [English Language Editing Service](#)

Manuscripts Accepted for First Look

ACTION	STATUS	ID	TITLE	SUBMITTED	DECISIONED
submit updated manuscript	AE: Not Assigned ADM: Baker, Gwen	MCU4-2017-09-0005	Invited paper on the Science of Nature View Submission	21-Sep-2017	16-Apr-2018
	<ul style="list-style-type: none"> Accept (16-Apr-2018) Awaiting First Look Updates 				
view decision letter					

When the manuscript reaches the First Look task, the Production Editor has the option to place the manuscript back into the Author Center for updates or to cancel the task and move forward in the workflow.



Manuscript Information

Submitted: 21-Sep-2017; Last Updated: 16-Apr-2018; 207 days, 3 hours in review

- MCU4-2017-09-0005 *Invited*
- Invited paper on the Science of Nature
- Porter, Christina (proxy) (contact)
- Original Article
- Accept (16-Apr-2018)
- First Look (Due 16-May-2018)

AE: Not Assigned
EIC: Not Assigned
ADM: Baker, Gwen

Audit Trail

HTML PDF Supplementary Files Original Files Abstract Cover Letter External Searches

Manuscript Files

First Look

Special Instructions:

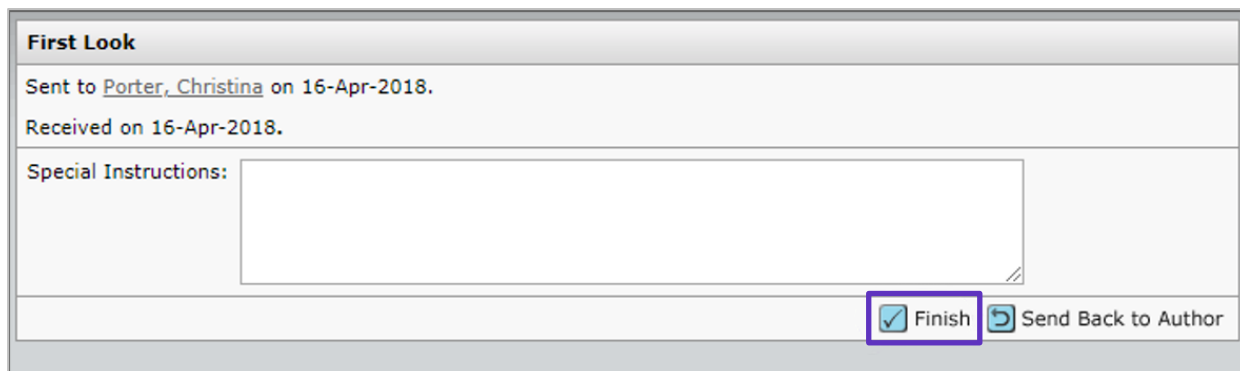
☒ Cancel and Bypass Task ☐ Send Back to Author

Notes

Note Title	Updated By	Updated On	Edit	Delete
This document has no notes.				

They can either click **Cancel and Bypass Task** or **Send Back to Author**. Additionally, they can add any special instructions for the author in the available text box on the task. If they choose **Send Back to Author**, the manuscript is then available in the Author Center for the author to preview the PDF or to update their manuscript files and metadata.

Once the updated manuscript is submitted, the Production Editor can approve the changes by clicking **Finish**, or once again **Send Back to Author** to repeat the updating process in the Author Center.



First Look

Sent to Porter, Christina on 16-Apr-2018.

Received on 16-Apr-2018.

Special Instructions:

☒ Finish ☐ Send Back to Author

DOI

DOI stands for Digital Object Identifier. DOIs can be used to find information about the content, including where the content can be found on the Internet. For more information, visit the Frequently Asked Questions about the DOI® System: <http://www.doi.org/faq.html>

If configured, this number will be added to a manuscript upon acceptance. It is exported along with the manuscript's metadata. It is found on the Manuscript Information tab, under the Production Details section.

Email Templates

There are two main types of emails that should be added to get the most usage out of the Production Center. There are **E-mail Notifications and Reminders** that trigger to notify various production users that the manuscript is ready for action and **System Emails** which trigger export information. This section also outlines the commonly used **Email Tags** to be added to these email types.

Email Notifications and Reminders

Any Production task that exists on a site will have a space for adding email templates. These are located under Email Templates->**E-mail Notifications and Reminders**, under the **Accepted Workflow Tasks** section. If a due date is specified for a task, you can use the Reminder Days column. Otherwise, you can designate when the email is to trigger, based on the task status, under the When Task Enters? column. Additionally, you can designate if you would like it to be Edit before Sending, or to trigger in the background.

Accept Workflow Tasks	Edit Before Sending	Active	When Task Enters?	Reminder Days	Modify	Delete
Production Checklist - add template						
Awaiting Production Checklist	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pending ▼ or <input type="text"/>			
Assign to Batch - add template						
Awaiting Assignment to Batch	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pending ▼ or <input type="text"/>			
Forms Tracking - add template						
Forms Completion - add template						
						<input checked="" type="checkbox"/> Save



















Email Notification and Reminders for forms tasks

- **Forms Tracking Notices** are for the person completing the tasks in the Production Center.
- **Forms Completion Notices** are for the Author(s).

Notification						
Forms Tracking Task - add template						
Form Tracking Processing--Form Ready for Approval	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Processing ▼ or <input type="text"/>			
Forms Completion Task - add template						
Forms Completion Pending - One Week Overdue	<input type="checkbox"/>	<input checked="" type="checkbox"/>	--- ▼ or 7			
Forms Completion Pending - Two Weeks Overdue	<input type="checkbox"/>	<input checked="" type="checkbox"/>	--- ▼ or 14			
Forms Completion Pending - Three Weeks Overdue	<input type="checkbox"/>	<input checked="" type="checkbox"/>	--- ▼ or 21			
Forms Completion Pending - Four Weeks Overdue	<input type="checkbox"/>	<input checked="" type="checkbox"/>	--- ▼ or 30			
Form Completion Pending	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pending ▼ or <input type="text"/>			
						<input checked="" type="checkbox"/> Save

System Emails

All export related emails are located under **System Emails->Misc. Event-Driven E-mails**. These trigger based on whether or not an export is successful.

Misc. Event-Driven E-Mails	Edit Before Sending	Active	Modify	Delete
req  Manuscript exported via email - add template				
Manuscript Exported Via E-Mail	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
req  Export Manifest exported via email - add template				
 Electronic Form: PDF Failed to Generate - add template				
Electronic Form: PDF Failed to Generate	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
req  Broadcast E-Mails - add template				
Broadcast Email Template	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Vacation	<input type="checkbox"/>	<input type="checkbox"/>		
req  Manuscript Export Failed - add template				
Manuscript Failed to Export	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
 Manuscript Export Succeeded - add template				
Manuscript has been Exported	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Commonly Used Email Tags

Below is a list of the common email tags used in the Production Center email templates.

One of the most important tags to use is the **##ERROR_DETAILS##** tag. This tag will tell the recipient why and export has failed. Best Practice: Add this tag to the Manuscript Export Failed email template.

Site Fields: These tags will contain journal-specific information. Some of these are pulled from the Configuration Settings fields that Admins complete.

##BATCH_NAME##	The name of the batch that the manuscript was included in
##ERROR_DETAILS##	Only applicable for errors involved with batch exports.

Document Fields: These tags will reflect the properties of the current manuscript.

##DOCUMENT_DOI##	Document DOI
##GROUP_NAME##	Group Name
##ISSUE##	Issue
##ISSUE_DESCRIPTION##	Description
##ISSUE_EISBN##	The eISBN number associated with this issue.
##ISSUE_END_PAGE##	The end page associated with this issue.
##ISSUE_ISBN##	The ISBN number associated with this issue.
##ISSUE_ISSN##	The ISSN number associated with this issue.
##ISSUE_NOTES##	Issue Notes
##ISSUE_PRINT_RUN##	The print run for with this issue.
##JOURNAL_ID##	The ID associated with this journal.
##LIST_BEGIN##	Tag that represents the beginning of a repeating section of email tags related to a list of documents
##VOLUME##	Volume

Document Task Fields: These tags will reflect items concerning the peer review of the manuscript.

##FIRST_LOOK_SPECIAL_INSTRUCTIONS##	Any instructions entered into the "Special Instructions for Author" text box.
---	---

If you require technical assistance, please contact Customer Care at s1help@clarivate.com.

About Clarivate

Clarivate™ is a global leader in providing solutions to accelerate the pace of innovation. Our bold mission is to help customers solve some of the world's most complex problems by providing actionable information and insights that reduce the time from new ideas to life-changing inventions in the areas of Academia & Government, Life Sciences & Healthcare, Professional Services and Consumer Goods, Manufacturing & Technology. We help customers discover, protect and commercialize their inventions using our trusted subscription and technology-based solutions coupled with deep domain expertise. For more information, please visit clarivate.com.

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