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.

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 use for in-house exports for independent publishers or journals.

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.

![Image of Complete Production Checklist](image1)

Select **View Details** to go to the Manuscript Information tab.

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.

![Image of Author-Supplied Data](image2)

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Document Version: 2.05
3. **Manuscript Files tab** - Verify all files to be exported have the **Ready for Batch/Page Count** box checked.

![Manuscript Files tab](image)

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

![Production Checklist](image)
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.

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.

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

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: MCU3-2014-06-0013

#### Bypass batch process

- Bypass all
- Remove from any current assigned batches and mark as 'Export Complete'
- Bypass the following specific batch(es)
- Export to Publisher (manuscript is currently assigned to this batch)

#### Select a pre-defined export target

- Export Target:
  - Export to Publisher
  - old papers
  - Export to Publisher

#### or define a new export target

1. **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)

2. **Location:**
   - Select Location: [ 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.
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](image)

   **Timing:**
   - on
   - Weekly (on Sundays)
   - Monthly (on the day of every month)
   - Daily
   - Within 24 hours of when the total number of manuscripts is

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](image)

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

<table>
<thead>
<tr>
<th>Issue List - contains 2 issues</th>
<th>Issues: All Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Criteria: All Issues</td>
<td>1:2 of 2</td>
</tr>
<tr>
<td>Volume, Issue, Description</td>
<td>Pages in Issue</td>
</tr>
<tr>
<td></td>
<td>(budget / actual)</td>
</tr>
<tr>
<td>17B 149877 Special Issue 2015</td>
<td>0 / 1.0</td>
</tr>
<tr>
<td></td>
<td>ISSN:</td>
</tr>
<tr>
<td></td>
<td>eISSN:</td>
</tr>
<tr>
<td></td>
<td>Issue End Page:</td>
</tr>
<tr>
<td></td>
<td>Print Run:</td>
</tr>
<tr>
<td></td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>x</td>
</tr>
<tr>
<td>07 2014 July 2015.</td>
<td>0 / 0.0</td>
</tr>
<tr>
<td></td>
<td>ISSN:</td>
</tr>
<tr>
<td></td>
<td>eISSN:</td>
</tr>
<tr>
<td></td>
<td>Issue End Page:</td>
</tr>
<tr>
<td></td>
<td>Print Run:</td>
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<td>0</td>
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<tr>
<td></td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>
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

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.
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.

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.

<table>
<thead>
<tr>
<th>Volume: 178, Issue 149877 (contains 2 papers)</th>
<th>Status</th>
<th># Pages</th>
<th>Details / Est</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manuscript ID: MCUI-2013-05-0007</td>
<td>Accept (10-Jul-2015)</td>
<td>est: 0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manuscript ID: MCUI-2013-07-0010</td>
<td>Accept (15-Jul-2015)</td>
<td>est: 0.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

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

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

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.

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.
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.
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.

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.
If Production Editor verifies these forms as correct, they will click the **Forms Complete - Move to Next Task** icon. This will advance the manuscript to the next part of the Accepted Workflow.

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.

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.

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.
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.
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.
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).
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.

![System Emails Table]

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 ##ERRORDETAILS## 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.

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>##BATCH_NAME##</td>
<td>The name of the batch that the manuscript was included in</td>
</tr>
<tr>
<td>##ERROR_DETAILS##</td>
<td>Only applicable for errors involved with batch exports.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>##DOCUMENT DOI##</td>
<td>Document DOI</td>
</tr>
<tr>
<td>##GROUP_NAME##</td>
<td>Group Name</td>
</tr>
<tr>
<td>##ISSUE##</td>
<td>Issue</td>
</tr>
<tr>
<td>##ISSUE_DESCRIPTION##</td>
<td>Description</td>
</tr>
<tr>
<td>##ISSUE EISBN##</td>
<td>The eISBN number associated with this issue.</td>
</tr>
<tr>
<td>##ISSUE END PAGE##</td>
<td>The end page associated with this issue.</td>
</tr>
<tr>
<td>##ISSUE ISSN##</td>
<td>The ISSN number associated with this issue.</td>
</tr>
<tr>
<td>##ISSUE NOTES##</td>
<td>Issue Notes</td>
</tr>
<tr>
<td>##ISSUE PRINT RUN##</td>
<td>The print run for with this issue.</td>
</tr>
<tr>
<td>##JOURNAL ID##</td>
<td>The ID associated with this journal.</td>
</tr>
<tr>
<td>##LIST_BEGIN##</td>
<td>Tag that represents the beginning of a repeating section of email tags related to a list of documents</td>
</tr>
<tr>
<td>##VOLUME##</td>
<td>Volume</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>##FIRST LOOK SPECIAL INSTRUCTIONS##</td>
<td>Any instructions entered into the “Special Instructions for Author” text box.</td>
</tr>
</tbody>
</table>
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.