

Pleiades – Editorial Portal

Work Instructions Document

TNQ Technologies



Document History

Version No.	Change Summary	Section No.	Prepared/Modified By & Date	Reviewed By & Date
1.0	Initial Draft	All	Wilfred Aloysius 13-Apr-2020	
2.0	Initial Draft	All	Wilfred Aloysius	Suresh 09-Feb-2021
3.0	Contract Assignment Updated	4.1.1 4.1.2	Suresh 20-May-2022	Jay 22-May-2022



Table of Contents

1	Intr	oduction	3
2	Fun	ctional Overview	3
	2.1	Article Module	3
	2.2	Issue Module	3
3	Арр	lication Info, Title & User Setup	4
	3.1	Application URL	4
	3.2	Title & User Setup	4
4	Wo	rk Instructions	5
	4.1	Article Processing	5
	4.1.	1 Article Creation	5
	4.1.	2 AP – Article Validation	5
	4.1.	3 Article – Reopen For Updates	6
	4.1.	4 Article – Push to Production	8
	4.1.	5 Article – Download Article Package	8
	4.1.	6 Article – Production Status	9
	4.2	Issue Processing	9
	4.2.	1 Issue Creation	9
	4.2.	2 Issue – Create Issue Manifest	10
	4.2.	3 Issue – Reopen For Updates	11
	4.2.	4 Issue – Push to Production	13
	4.2.	5 Issue – Approval Flow	14
	4.2.	6 Issue – Revise Manifest Flow	14
	4.2.	7 Issue – Download Manifest	15
	4.2.	8 Issue - Production Status	16
5	Con	clusion	16
6	Glo	ssary	16



1 Introduction

The purpose of this document is to provide an overview on the Editorial Portal Features and related configuration. This document will detail out the configuration setup in the EP UAT System and a happy path flow of work with step by step instruction on what to do and information on what triggers what.

2 Functional Overview

This system will contain modules to handle Articles and Issues and will have upstream and downstream integrations with the Author Portal and Process Automation systems.

2.1 Article Module

The Article Module is packed with the following functionalities:

- 1. Dashboard & Tiles view for
 - a. New Articles created through Editorial Portal
 - b. Articles accepted through Author Portal
 - c. Articles that are verified and ready for Production
 - d. Articles that have been pushed into Production already
- Ability to <u>create new</u> Articles (or) <u>validate</u> Article accepted through Author Portal
 - a. Ability to <u>fill-in</u> (or) <u>update</u> Article metadata, including Author and Counterpart information
 - b. Ability to <u>upload</u> (or) <u>download</u> Article material
 - c. Ability to intermittently save all progress on the Article
 - d. Ability to mark an Article ready for Production
- 3. Ability to jump-to the Counterpart Article from current Article tile
- 4. Ability to move the Article along the following statuses
 - a. New
 - b. Accepted For Production
 - c. Ready For Production
 - d. Standard Production
 - e. Online Production
 - f. Issue Closed
 - g. Pushed into Production
- 5. Ability to track the Production progress of the Article [EP3 Functionality]
- 6. Ability to download the Article Package

2.2 Issue Module

The Issue Module is packed with the following functionalities:

- 1. Dashboard and Tile view for
 - a. The Issues from the Previous Year (Current Year 1)
 - b. The Issues from the Current Year (Current Year)
 - c. The Issues from the Next Year (Current Year + 1)



- d. The Issues from the Year after the Next (Current Year + 2)
- 2. Ability to create Issues from each of the dashboards
- 3. Ability to create an Issue Manifest
 - a. Ability to <u>associate</u> (or) <u>disassociate</u> Articles
 - b. Ability to <u>choose</u> a Production Type (between Article Online (or) Article Standard Production) for Articles that are ready for Production
 - c. Ability to <u>change</u> the Production Type (between Article Online (or) Article Standard Production) for Articles that are ready for Production
 - d. Ability to rearrange the Articles within the Issue Manifest
 - e. Ability to intermittently save the Issue Manifest
 - f. Ability to mark an Issue ready for Production
- 4. Ability to move the Issue along the following statuses
 - a. New
 - b. Ready For Production
 - c. Pushed Into Production
 - d. Waiting for Issue Approval [EP3 Functionality]
 - e. Issue Approved [EP3 Functionality]
 - f. Issue Revised [EP3 Functionality]
 - g. Issue Closed [EP3 Functionality]
- 5. Ability to <u>track</u> the Production progress of the Article [EP3 Functionality]
- 6. Ability to download the Article Package

3 Application Info, Title & User Setup

3.1 Application URL

Launch the Editorial Portal URL https://ep.sciencejournals.ru/login

3.2 Title & User Setup

Number of Journals configured - 99

Number of Users configured - 63

4 Work Instructions

4.1 Article Processing

4.1.1 Article Creation

Sno	Action	Output
1.	Login to the system	○ Expect to see the Journal
		Dashboard.
2	On the Journal Dashboard, click on a	o Expect to see the "New Article"
	Journal accordion, under the Journal	dashboard and to see all the
2.	accordion click on the "New Articles"	Articles that were created in EP
	dashboard link under the Articles	and was intermittently saved.



	section	 Expect to see an empty dashboard if there no Articles created in EP and was intermittently saved.
3.	In the "New Articles" dashboard, click on the "Create Article" button.	 Expect to see the "Article Metadata" page with a list of metadata fields.
4.	Article Metadata: Fill information on all the fields. Note: 1. Both the Russian and English metadata sections will be displayed in this system. 2. Ordering of the sections will depend on the Journal language. Eg: Russian section first for Russian Journals Click on the "Next" button when finished	 Expect to see the "Article Asset Upload" page.
5.	Article Assets: Upload all the required Article Assets on this page and click on the "Ready For Production" button. Note: 1. Newly created Articles can either be intermittently saved or can be marked Ready for Production 2. This is because these Article are being added to the system after the Peer Review Cycle	 Expect to see the "New Article" dashboard with no Article Tiles or with intermittently saved Articles Expect the Article to have moved into the "Ready For Production" dashboard since the status of the Article has changed
6.	Contract & OA Validation Verify the Contract details updated is Online/Offline. 1. Upload required contract agreement file with "Agreement/License Agreement" under file role Verify Open Access info in Metadata page is "Yes" 2. Upload required file with "OA consent" as File Role Update Metadata for Co Author in respect Metadata Update Checkbox available so to enable "Ready for Production"	 Expect to see files uploaded in "License agreement" Expect to see files uploaded in "Open access download popup window" Expect to see "Ready for Production Enabled"



7.	Click on the "Ready For Production" button. Note: 1. Validated Articles can either be intermittently saved or can be marked Ready for Production	 Expect to see the "Accepted for Production" dashboard. Expect the Article to have moved into the "Ready For Production" dashboard since the status of the Article has changed
----	---	--

4.1.2 AP - Article Validation

Sno	Action	Output
1.	Login to the system and navigate to the "Accepted For Production" in Article dashboard	 Expect to see the "Accepted for Production" dashboard and to see all the Articles that was accepted for Production in the AP system.
2.	Article Metadata: Identify the Article and click on the <article id=""> link or click on the "Validate Article" menu under the Actions Menu.</article>	 Expect to see the "Article Metadata" page with the metadata from AP filled up. Expect the Article Metadata fields to be editable Expect to see the list of Assets received from AP. Expect to see download links against all the Article Assets
3.	Article Assets: Modify any of the Article Metadata as required and download any of the Article Assets as required Note: 1. Both the Russian and English metadata sections will be displayed in this system. 2. Ordering of the sections will depend on the Journal language. Eg: Russian section first for Russian Journals Click on the "Next" button when finished	 Expect to see the "Article Asset Upload" page with the Article Assets received from AP already listed Expect to see options to remove any of the existing Asset files and the ability to upload new Article Assets to the system Expect to see the Asset Classification option on all the Article Asset files.
4.	Contract & OA Validation Verify the Contract details updated is Online/Offline. 1. Upload required contract agreement file with "Agreement/License Agreement" under file role	 Expect to see files uploaded in "License agreement" Expect to see files uploaded in "Open access download popup window"
	Verify Open Access info in Metadata page is "Yes"	 Expect to see "Ready for Production Enabled"



	2. Upload required file with "OA consent" as File Role Update Metadata for Co Author in respect Metadata Update Checkbox available so to	
	enable "Ready for Production"	
5.	Click on the "Ready For Production" button. Note: 2. Validated Articles can either be intermittently saved or can be marked Ready for Production	 Expect to see the "Accepted for Production" dashboard. Expect the Article to have moved into the "Ready For Production" dashboard since the status of the Article has changed

4.1.3 Article – Reopen For Updates

Sno	Action	Output
1.	Login to the system and navigate to the "Ready For Production" dashboard	 Expect to see the "Ready for Production" dashboard and to see all Articles that are ready to be pushed into Production.
2.	Identify the Article and click on the <article id=""> link or click on the "Validate Article" menu under the Actions Menu.</article>	 Expect to see the "Article Metadata" page. Expect the Article Metadata fields to be disabled Expect to see the list of Assets. Expect to see no option to move to the next page
3.	Click on the "Back" hyperlink and on the "Ready For Production" dashboard, Identify the Article and click on the "Action Menu".	 Expect to see options to reopen the Article for updates
4.	Click on the "Re-Open For Updates" menu to reopen the Article	 Expect to see the Status of the Article Tile change to "Re-Open". Expect the Article to remain in the "Ready For Production" dashboard
5.	Identify the Article and click on the <article id=""> link or click on the "Validate Article" menu under the Actions Menu.</article>	 Expect to see the "Article Metadata" page with the metadata from AP filled up. Expect the Article Metadata fields to be editable Expect to see the list of Assets received from AP. Expect to see download links against all the Article Assets



6.	Modify any of the Article Metadata as required and download any of the Article Assets as required Note: 1. Both the Russian and English metadata sections will be displayed in this system. 2. Ordering of the sections will depend on the Journal language. Eg: Russian section first for Russian Journals Click on the "Next" button when finished	 Expect to see the "Article Asset Upload" page with the Article Assets already listed Expect to see options to remove any of the existing Asset files and the ability to upload new Article Assets to the system Expect to see the Asset Classification option on all the Article Asset files.
7.	Click on the "Ready For Production" button. Note: 1. Validated Articles can either be intermittently saved or can be marked Ready for Production	 Expect to see the "Ready For Production" dashboard. Expect the Article Status to have moved to "Ready For Production"

4.1.4 Article - Push to Production

Sno	Action	Output
1.	Login to the system and navigate to the "Ready For Production" dashboard	 Expect to see the "Ready for Production" dashboard and to see all Articles that are ready to be pushed into Production.
2.	Identify the Article and click on the <article id=""> link or click on the "Validate Article" menu under the Actions Menu.</article>	 Expect to see the "Article Metadata" page. Expect the Article Metadata fields to be disabled Expect to see the list of Assets. Expect to see no option to move to the next page
3.	Click on the "Back" hyperlink and on the Article Metadata page, Identify the Article and click on the "Action Menu".	 Expect to see options to push the Article into Standard Production and to push the Article into Online Production
4.	Click on the "Push to Standard Production" if the Article is to be composed as part of the Issue (or) click on the "Push to Online Production" if the article is to independently online published	 Expect to see the Article Tile disappear. Expect the Article to have moved into the "Pushed Into Production" dashboard since the status of the Article has changed



4.1.5 Article – Download Article Package

Sno	Action	Output
1.	Login to the system and navigate to either the "Ready For Production" or the "Pushed Into Production" dashboards of any Journal	 Expect to see the "Ready for Production" or the "Pushed into Production" dashboard and to see all Articles available in the corresponding status.
2.	Identify an Article and click on the "Action Menu".	 Expect to see options to Download the Article Package
3.	Click on the "Download Article Package" menu	 Expect to see a ZIP Package download from the system. Expect the ZIP Package to contain a Metadata XML and all Article Assets

4.1.6 Article – Production Status

Sno	Action	Output
1.	Login to the system and navigate to the "Pushed Into Production" dashboard of any Journal	 Expect to see the "Pushed into Production" dashboard and to see all Articles available in the corresponding status. Expect to see the "Production Status" column display the Current Production Milestone The Production Statuses this column will displayed will be as below: Sent To Production [Отправлено на публикацию] Article Processing [Подготовка статьи к публикации] Article Composition [Верстка статьи] Article Proofing [Корректура статьи] Article Final File [Финальная версия статьи] Article Published Online [Статья опубликована в электронном виде] Issue Sequencing [Упорядочивание выпуска] Issue Composition [Верстка выпуска] Issue Proofing [Корректура



выпуска]
10. Issue Final File [Финальная
версия выпуска]
11. Issue Published Online
[Выпуск опубликован в
электронном виде]
12. Issue Printed [Выпуск
опубликован в печатном виде]

4.2 Issue Processing

4.2.1 Issue Creation

Sno	Action	Output
1.	Login to the system	 Expect to see the Journal Dashboard.
2.	On the Journal Dashboard, click on a Journal accordion, under the Journal accordion click on the "Current Issue Year - 2021" dashboard link under the Issues section	 Expect to see the "Current Issue Year - 2021" dashboard and to see all the Issues that have been created in EP. Expect to see an empty dashboard if there are no Issue created in EP.
3.	In the "Current Issue Year - 2021" dashboard, click on the "Create 2021 Issue Plan" button if the dashboard is empty or on the "+ Add Additional Issues" button if there are existing Issue records.	 Expect to see the "New Issue" popup with a list of metadata fields.
4.	Fill in all the required information and click on the "Save" button.	 Expect to see the "Current Issue Year - 2021" dashboard with the newly created Issue
5.	Identify the Issue and click on the "Action Menu".	 Expect to see options to view Issue Information
6.	Click on the "Issue Information" menu	 Expect to see the "New Issue" popup with some of the fields disabled.

4.2.2 Issue - Create Issue Manifest

Sno	Action	Output
1.	Login to the system and navigate to one of the Issue dashboards	 Expect to see the Issue dashboard and to see all the Issues that was created in the system.
2.	Click on the any Year to create Article	 Issue Dashboard to be opened with respective year
3.	Click on the "Add Additional Issue" to Create issue in respective year	o Issue Plan Creation should be open



4.	Update Metadata for Issue Creation	 Issue should be created after completing and save Issue Plan Creation
5.	Identify an Issue and click on the <issue id=""> link or click on the "Issue Manifest" menu under the Actions Menu. For Open issue.</issue>	 Expect to see the "Issue Manifest – Available Article" page with a list of eligible Article tiles. Note: An Article is eligible if it has not been assigned to any other Issue and the Article Status is either "Ready For Production" or "Online Production" or "Standard Production" Expect to see option "Add Article" when the Article Status is either "Online Production" or "Standard Production". Expect to see options "Add Article for Standard Production" and "Add Article for Online Production" when the Article Status is "Ready for Production". Expect the Article tiles to disappear from the list on successful association. Expect the Article and Page Counts to be updated as Articles are associated. Expect to see a "Show only Selected Article" link when the Articles count is more than 0
6.	Click on the "Show only Selected Article" link.	 Expect to see the "Issue Manifest Selected Articles" page with all the associated Articles listed in the same order as they were associated. Expect to see a rearrange icon against all the Article tiles. Expect to see the Article tiles rearranged when dragged and dropped Expect to see option "Remove" when the Article Status is either "Online Production" or "Standard Production" Expect to see option "Change to Standard Production" when the "Add Article for Online Production" option was used to



		associate the Article. • Expect to see option "Change to Online Production" when the "Add Article for Standard Production" option was used to associate the Article.
7.	Rearrange the Articles as required and click on the "Ready For Production" button when finished Note: 1. Users may also use the Save and Exit button to intermittently save all progress on the Issue Manifest	 Expect to see the Issue dashboard. Expect to see a change in the Issue Status

4.2.3 Issue – Reopen For Updates

Sno	Action	Output
1.	Login to the system and navigate to one of the Issue dashboards	 Expect to see the Issue dashboard and to see all the Issues that was created in the system.
2.	Identify an Issue that is in the "Ready For Production" status and click on the "Issue Manifest" menu under the Actions Menu.	 Expect to see the "Issue Manifest Selected Articles" page with all the associated Articles listed in the order they were associated. Expect to see the rearrange icon against all the Article tiles in disabled state. Expect to see "No Action Required" against the Action column Expect to see the Planned Pages, Assigned Pages and Assigned Articles information.
3.	Click on the "Back" hyperlink and on the "Issue Manifest – Selected Articles" page, Identify the Issue and click on the "Action Menu".	 Expect to see options to re-open the Issue for updates
4.	Click on the "Re-Open For Updates" menu to reopen the Issue	 Expect to see the Status of the Issue Tile change to "Re-Open".
5.	Identify the Issue and click on the "Issue Manifest" menu under the Actions Menu.	 Expect to see the "Issue Manifest Selected Articles" page with all the associated Articles listed in the order as they were associated. Expect to see a rearrange icon against all the Article tiles. Expect to see the Article tiles rearranged when dragged and



		dropped
		Expect to see option "Remove"
		when the Article Status is either "Online Production" or "Standard Production"
		 Expect to see option "Change to Standard Production" when the "Add Article for Online Production" option was used to associate the Article. Expect to see option "Change to Online Production" when the "Add Article for Standard Production"
		 option was used to associate the Article. Expect to see an option to view and select Available Articles
6.	Rearrange the Articles as required and click on the "Ready For Production" button when finished Note: 1. Users may also use the Save and Exit button to intermittently save all progress on the Issue Manifest	 Expect to see the Issue dashboard. Expect to see a change in the Issue Status

4.2.4 Issue – Push to Production

Sno	Action	Output
1.	Login to the system and navigate to one of the Issue dashboards	 Expect to see the Issue dashboard and to see all the Issues that was created in the system.
2.	Identify an Issue that is in the "Ready For Production" status and click on the "Issue Manifest" menu under the Actions Menu.	 Expect to see the "Issue Manifest Selected Articles" page with all the associated Articles listed in the order they were associated. Expect to see the rearrange icon against all the Article tiles in disabled state. Expect to see "No Action Required" against the Action column Expect to see the Planned Pages, Assigned Pages and Assigned Articles information.
3.	Click on the "Back" hyperlink and on the "Issue Manifest – Selected Articles" page, Identify the Issue and	Expect to see options to push the Issue into Production



	click on the "Action Menu".	
4.	Click on the "Push to Production" menu	 Expect the Issue to have moved into the "Pushed Into Production" status

4.2.5 Issue – Approval Flow

Sno	Action	Output	
Pre-R	Pre-Requisite: The Issue was pushed into production and the Production team		
progr	essed on the Issue. The production team	n completed the Final File Service and	
the w	orkflow has moved into the "Wait For Is	ssue Approval" task in the Issue	
Appro	oval Service. At the "Wait For Issue Appi	roval" task in the PA System, the Issue	
will m	nove into the "Wait For Issue Approval"	status in the EP System.	
	Login to the system and navigate to	 Expect to see the Issue dashboard 	
1.	Login to the system and navigate to one of the Issue dashboards	and to see all the Issues that was	
		created in the system.	
2	Identify an Issue that is in the "Wait	 Expect to see options to approve 	
2.	For Issue Approval" status.	the Issue and to revise the Issue.	
		 Expect to see the Status of the 	
	To approve the leave click on the	Issue change to "Issue Approved"	
2	To approve the Issue, click on the "Approve Issue" option in the Action	 Expect the Issue workflow in the 	
3.		PA System move to the Online	
	menu.	Publication and Issue Print	
		services.	

4.2.6 Issue – Revise Manifest Flow

Sno	Action	Output	
progr the w Appro	<u>Pre-Requisite</u> : The Issue was pushed into production and the Production team progressed on the Issue. The production team completed the Final File Service and the workflow has moved into the "Wait For Issue Approval" task in the Issue Approval Service. At the "Wait For Issue Approval" task in the PA System, the Issue		
will n	nove into the "Wait For Issue Approval"		
1.	Login to the system and navigate to one of the Issue dashboards	 Expect to see the Issue dashboard and to see all the Issues that was created in the system. 	
2.	Identify an Issue that is in the "Wait For Issue Approval" status.	 Expect to see options to approve the Issue and to revise the Issue. 	
3.	To revise the Issue, click on the "Revise Issue" option in the Action menu.	 Expect to see the Status of the Issue change to "Revision Pending" 	
4.	To revise the Issue Manifest, click on the "Issue Manifest" menu under the Actions Menu.	 Expect to see the "Issue Manifest Selected Articles" page with all the associated Articles listed in the order as they were associated. Expect to see a rearrange icon against all the Article tiles. Expect to see the Article tiles 	

"Issue Approved" or "Issue

action.

Revised" status based on the



		rearranged when dragged and	
		dropped	
		 Expect to see option "Remove" 	
		when the Article Status is either	
		"Online Production" or "Standard	
		Production"	
		○ Expect to see option "Change to	
		Standard Production" when the	
		"Add Article for Online	
		Production" option was used to	
		associate the Article.	
		 Expect to see option "Change to 	
		Online Production" when the "Add	
		Article for Standard Production"	
		option was used to associate the	
		Article.	
		 Expect to see an option to view 	
		and select Available Articles	
	Update the Issue Manifest by	 Expect to see the Status of the 	
	 Adding new Articles 	Issue change to "Issue Revised"	
5.	 Removing existing Articles 	 Expect the Issue workflow in the 	
٦.	 Rearranging the Articles 	PA System move to the "Review	
	And click on the "Revise Manifest"	Revised Manifest" task.	
	button	Revised Mailifest task.	
	PTD Coordinator in the PA System will wo		
taska	and will choose to Accept the Revision o	r Reject the Revision.	
	If the PTD Coordinator accepts the revision, the Issue Workflow will progress to		
	the Issue Sequencing Service and the updated list of Articles will be setup in the		
	PA System for Composition.		
	If the PTD Coordinator rejects the revision, the Issue Manifest will roll back to the		
	previous version and the revision will be cancelled. The Issue in the EP System will		
move	back to the "Wait For Issue Approval" s		
	The Issue may be Approved in its	 Expect the Issue to move into the 	

4.2.7 Issue – Download Manifest

5

6.

Sno	Action	Output
1.	Login to the system and navigate into an Issue dashboard	 Expect to see the Issue dashboard and to see all Issue in different statuses.
2.	Identify an Issue that is in the "Ready For Production" status and click on the "Action Menu".	 Expect to see options to Download the Issue Manifest
3.	Click on the "Download Issue Manifest" menu	 Expect to see an Excel File download from the system.

current state or a new Revision may

be generated by repeating Step 3 to



o Expect the Excel File to contain
the Article Lineup with the Order,
Production Type and Article
Metadata

4.2.8 Issue – Production Status

Sno	Action	Output
1.	Login to the system and navigate to a Issue dashboard of any Journal	 Expect to see the "Pushed into Production" Issues. Expect to see the "Production Status" column display the Current Production Milestone The Production Statuses this column will displayed will be as below: Sent To Production [Отправлено на публикацию] Issue Sequencing [Упорядочивание выпуска] Issue Composition [Верстка выпуска] Issue Proofing [Корректура выпуска] Issue Final File [Финальная версия выпуска] Issue Published Online [Выпуск опубликован в электронном виде] Issue Printed [Выпуск опубликован в печатном виде]

5 Conclusion

By following this Work Instructions document, users of the system will be able to understand the flow of work around Article and Issues and get a hands-on to the system functionalities.

6 Glossary

<note: and="" definitions="" list="" of="" terms=""></note:>
End of Document
End of Document