

EEMUG 2020



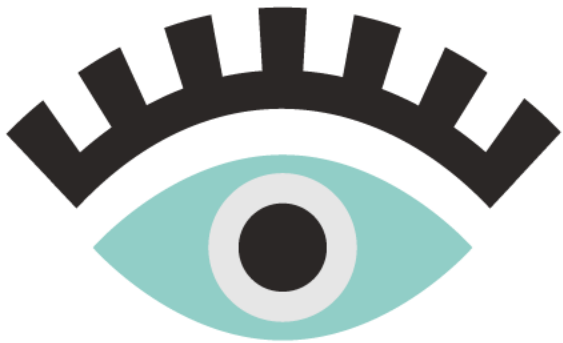
#EEMUG2020





Cross-Publication Functionality

*Overview, and Brainstorming
the Future*



SJ MacRae
Senior Business Systems Analyst
smacrae@ariessys.com

#EEMUG2020



B.E.V.

(Before Enterprise View)



Earlier Cross-Publication Features

- EM Portal/People Sharing Group
 - Allows synchronization of People Records
- Cross Publication Login List ('Go To' publications)
 - Allows shared login across publications
- Publish/Subscribe to Letter Templates
 - Allows master configuration of letters
- Cross-Publication Reporting
 - Allows shared reporting using XEAR
 - Based on a shared UDB (Unified Database)
- Cross-Publication Duplicate Submission Check
 - Uses UDB
- Cross-Publication Reviewer Statistics
 - Uses UDB



EV

(Enterprise View)



PM Enterprise View (“EV”)

- PM users have long asked for a way to manage production responsibilities across multiple publications without having to login and logout, or jump from the main menu on one PM site to the next.
- **SOLUTION:** New PM Enterprise View allows users to access submissions across multiple publications within a single interface from a new menu tab available on any of the PM sites.



EV Development Priorities

1. Prioritize Functionality that is multi-journal by nature
 1. Hence Production before Editorial
2. Active items only
 1. No '... with Production Completed'
3. Identify work a user needs to do across publications
 1. Tasks Assigned to Me
 2. Search functionality (for 'Custom Folder' effects of Saved Searches)
 3. To-Do folders
 4. Work I need to oversee/Tasks I have assigned/PSG
4. Then look at general overviews
 1. E.g. 'All submissions in...' folders



“Under the Bonnet”



- Publication must be a PM customer
- Publication must have a UDB (Unified Database)
- User has Editor or Publisher RoleManager permission to access EV
- User has Cross-Publication Login permissions and has configured a Cross-Publication Login List
- User has appropriate production-related permissions on publications in the group



Phased Implementation



- Version 16.1 built the infrastructure
- Added priority pages:
 - Submission Tasks Assigned to Me folder
 - Schedule Group Tasks Assigned to Me folder
 - Search Submissions
- Version 17.0 (in development) adds 5 additional folders to EV
 - ‘At-Risk’ Submissions
 - Production Initiated – No Tasks Assigned
 - Submission Tasks I Have Assigned
 - View All Production Tasks With Authors
 - View All Submissions in Production



EV Phase 1

Completed



New Editor and Publisher Permissions

Edit Role Definition

Role Name:*
Maximum Role name is 40 characters.

Check the functions that this role is permitted to perform. Note: in boxes with multiple rows displayed, you may select or deselect multiple terms by holding down the CTRL (PC) or CMD/Apple key (Mac) when clicking.

[Expand All](#) [Collapse All](#)

- New Submissions**
- Editor Assignment**
- Reviewer Invitations**
- Editor Decisions**
- Proposals/Commentaries**
- General Searching and Viewing**
- Edit Submission**
- Discussion Forums**
- Transmittal Form**
- Sending E-mail**
- Viewing and Editing People Data**
- Flag Icons**
- Proxy Activities**
- Administrative and Reporting Functions**
- Cross-Publication Login**
- ProduXion Manager**
- Enterprise View**
 - Access Enterprise View Tab
 - Search All Submissions in Enterprise View



New Enterprise View Menu

Editorial | **Proposal Menu** | **Production Tasks** | **Enterprise View**

**-- Managing Editor
Enterprise View Menu**

Quick Searches:

- 16018
- Andrew Journal with test submissions
- Batch Assignment Workflow test
- Corresponding Production Editor First Name is containing 'a'
- EditorMenu

Enterprise View Search

[Search Submissions](#)

Enterprise View To-Do List

- [Submission Tasks Assigned to Me \(22\)](#)
- [Schedule Group Tasks Assigned to Me \(2\)](#)

Reports

[Cross-Publication Enterprise Analytics Reporting](#)



Make EV Menu a user's Default Login Menu

Search People - Update Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

George Stanley

Self-Registered:
Jan 18, 2017

Last Modified:
Dec 11, 2018

User Information

[Open Special Character Palette](#)

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Default Login Menu

Available as a Reviewer?

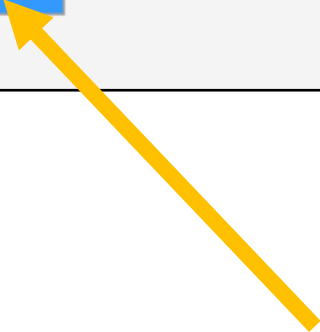
Board Member?

Forbidden as a Reviewer?

Reviewer Role *

Publisher Role *

- Production Menu
- Editorial Menu
- Proposal Menu
- Production Menu
- Enterprise View Menu**
- None



EV Folders

- EV folders take the existing PM folders and enhance them with:
 - PowerGrid format (just like existing Search Results & Production Status Grid)
 - Publication Code filter to refine the result set by publication
 - New Publication Code column to easily identify which site the task belongs to

Quicklinks ▼ Collapse

Submission Tasks Assigned To Me

Page: 1 of 1 (22 total submissions) 25 results per page. ⚙

Show: Enterprise View
SERGEIDEV16018
VIJAYDEV16018

Action	Publication Code	Manuscript Number	DOI	Author Name	Article Title	Production Status	Production Task	Date Task Assigned	Date Due
Go To Task	SERGEIDEV16018	AmyDev-140-17-018	2017spring/Am 140-17-018.1	Colorado Avalanche	MDV_31082_100	New in Production	Task#2	Mar 20 2017 03:06PM	Mar 20 11:59
Go To Task	SERGEIDEV16018	AmyDev-140-17-017	2017spring/Am 140-17-017.1	Marino Zerial	MDV_31082_001	New in Production	JATS1.1A Export Task	Mar 14 2017 02:39PM	Mar 20 11:59
Go To Task	SERGEIDEV16018	AmyDev-131-16-005	AmyDev131012	Amy R. Author, MBA	ΔLack of Spatial Subdivision for the Snapper Lutjanus purpureus (Lutjanidae - Perciformes) from Southwest Atlantic Based on Multi-Locus AnalyseαβσΩΦ®	New in Production; Batch Task Assigned	Batch Submission Task	Oct 11 2016 11:44AM	Oct 14 11:59
View Assignment Letter Assignment Files Submit Task Reassign Task Assign Production Task Assign to Schedule Group Production Details	VIJAYDEV16018	AmyTest-81-10-283	chrisdev91.116	Mary m Genius Mary, PhD, MD	1234	New in Production	Spec 11.0-39 NLM 3.0 include Orcid	Dec 05 2013 01:46PM	Dec 05 11:59

⏪ ⏩



Taking Action from EV Folders

- Full set of Action links for the records on the current site
- A 'Go To Task' link to carry out actions on other publications

Quicklinks ▼ Collapse

Submission Tasks Assigned To Me

?
Show: Enterprise View
25 results per page. ⚙️

Page: 1 of 1 (22 total submissions)

Action	Publication Code	Manuscript Number	DOI	Author Name	Article Title	Production Status	Production Task	Date Task Assigned	Date Due
Go To Task	SERGEIDEV16018	AmyDev-140-17-018	2017spring/Am 140-17-018.1	Colorado Avalanche	MDV_31082_100	New in Production	Task#2	Mar 20 2017 03:06PM	Mar 20 11:59
Go To Task	SERGEIDEV16018	AmyDev-140-17-017	2017spring/Am 140-17-017.1	Marino Zerial	MDV_31082_001	New in Production	JATS1.1A Export Task	Mar 14 2017 02:39PM	Mar 20 11:59
Go To Task	SERGEIDEV16018	AmyDev-131-16-005	AmyDev131012	Amy R. Author, MBA	ΔLack of Spatial Subdivision for the Snapper Lutjanus purpureus (Lutjanidae - Perciformes) from Southwest Atlantic Based on Multi-Locus AnalyseαβρσΩΦ®	New in Production; Batch Task Assigned	Batch Submission Task	Oct 11 2016 11:44AM	Oct 14 11:59
View Assignment Letter Assignment Files Submit Task Reassign Task Assign Production Task Assign to Schedule Group Production Details ▾ History Transmittal Form Edit Submission Send E-mail	VIJAYDEV16018	AmyTest-81-10-283	chrisdev91.116	Mary m Genius Mary, PhD, MD	1234	New in Production	Spec 11.0-39 NLM 3.0 include Orcid	Dec 05 2013 01:46PM	Dec 05 11:59



Taking Action from EV Folders (continued)

- Clicking 'Go To Task' on Site A takes you to the anchored location for that record on Site B, where you can carry out the Action.
- User is now in Enterprise View mode on Site B.
- User can continue working on Site B, or click 'Go To Task' to carry out Action on another site.

Quicklinks Collapse

Submission Tasks Assigned To Me

Show: Enterprise View

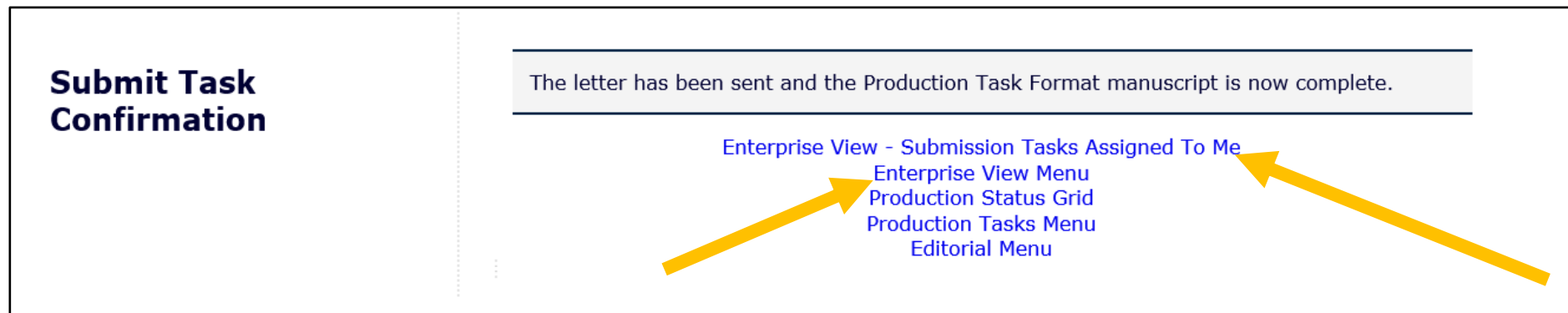
Page: 1 of 1 (22 total submissions) 25 results per page.

Action	Publication Code	Manuscript Number	DOI	Author Name	Article Title	Production Status	Production Task	Date Task Assigned	Date Due
Assignment Files Submit Task Reassign Task Assign Production Task Change Schedule Group Production Details History Transmittal Form Edit Submission Search in Google.com Send E-mail	SERGEIDEV16018	AmyDev-131-16-005	AmyDev131012	Amy R. Author, MBA	ΔLack of Spatial Subdivision for the Snapper <i>Lutjanus purpureus</i> (Lutjanidae - Perciformes) from Southwest Atlantic Based on Multi-Locus AnalyseαβρσΩΦ®	New in Production; Batch Task Assigned	Batch Submission Task	Oct 11 2016 11:44:18:023AM	Oct 14 11:59
Go To Task	VIJAYDEV16018	AmyTest-81-10-283	chrisdev91.116	Mary m Genius Mary, PhD, MD	1234	New in Production	Spec 11.0-39 NLM 3.0 include Orcid	Dec 05 2013 01:46:10:870PM	Dec 01 11:59
Go To Task	VIJAYDEV16018	A_Test-3.0-04-179R1		Linda L. Edney, MD	20000000	Manuscript Clean-Up; In Copy Prep; With Copy-Editor; With Typesetter	Format Manuscript	Jan 21 2010 03:09:31:303PM	Dec 21 11:59
Go To Task	VIJAYDEV16018	A_Test-3.0-04-179R1		Linda L. Edney, MD	20000000	Manuscript Clean-Up; In Copy Prep; With Copy-Editor;	Copy Editing	Jan 22 2010	Dec 21 11:59



EV Confirmation Pages

- Enhanced navigation on confirmation pages, allowing the user to return to EV, or work within the new publication



The screenshot shows a confirmation page with the following elements:

- Submit Task Confirmation** (Section Header)
- The letter has been sent and the Production Task Format manuscript is now complete.** (Confirmation Message)
- Enterprise View - Submission Tasks Assigned To Me** (Main Navigation Item)
- Enterprise View Menu** (Sub-item)
- Production Status Grid** (Sub-item)
- Production Tasks Menu** (Sub-item)
- Editorial Menu** (Sub-item)

Two yellow arrows point to the 'Enterprise View - Submission Tasks Assigned To Me' link, highlighting the enhanced navigation options.



EV Search Selection Criteria

- Four new search criteria:
 - Publication Code (top of list)
 - Corresponding Production Editor First and Last Name
 - Date Most Recent Production Task Completed

- Assigned Editor Last Name
- Assigned Editor Role
- Final Disposition Term
- Invitation Notes to Author
- Submission Flag Name
- Production Status Term
- Corresponding Production Editor First Name
- Corresponding Production Editor Last Name
- Date Most Recent Production Task Completed
- Sub. Target Online Publication Date
- Sub. Actual Online Publication Date
- Pre-Selected Schedule Group
- Schedule Group Description
- Schedule Group Notes
- Schedule Group Target Online Publication Date
- Schedule Group Target Publication Date
- Schedule Group Target Publication Volume
- Schedule Group Target Publication Issue
- Target Number of Pages
- Black and White Image Count
- Color Image Count
- Discussion Topic
- Discussion Unread Posts
- Discussion Comments
- Date Discussion Topic Initiated
- Discussion Topic Initiator First Name
- Discussion Topic Initiator Last Name
- Last Discussion Topic Post Date
- Discussion Topic Posted By First Name
- Discussion Topic Posted By Last Name

Search submissions selection criteria

Create a new Search definition or choose an existing Search definition to Run, Edit, or Remove. You may refine your criteria further on the Search Results page.

Search Definition: Choose Saved Search

Remove Search Definition

Edit Selected Search Definition

Run Selected Search Definition

- Publication Code
- Manuscript Number
- DOI
- Corresponding Author First Name
- Corresponding Author Last Name
- Article Title
- Short Title
- Article Type Name
- Section/Category Name
- Revision Number
- Keyword
- Classification Description
- Manuscript Notes
- Production Notes
- Proposed Reviewer Flag
- Editorial Status
- Editorial Status Date

Character

Value Options

Advanced

Is/Is not	Selector	Value
is	Contains	

Clear

Search



EV Search Results

Quicklinks ▼ Collapse

Search Submissions

Manuscript Number is containing '10'

Show: Enterprise View
SERGEIDEV16018
VIJAYDEV16018
LARGESITECLONE

Page 2 of 5 (10 total submissions) 100 results per page

Select	Action	Publication Code	Manuscript Number	DOI	Author Name	Article Title	Article Type	Short Title	Keywords	Classification	Corresponding Production Editor	Production Status	Schedule Group	Initial Date Submitted	Date Production Started	Submission Target Online Date	Section Category
<input type="checkbox"/>	View Submission Details Discussions Production Details History Production Status Grid File Inventory Edit Submission Classifications Send Back to Author View Reviews and Comments Assign Editor Assign Production Task Assign to Schedule Group Set Final Disposition Similar Articles in MEDLINE Search in Google.com Send E-mail Linked Submissions	sergeidev16018	amyDev-101-3-27R1	AmyDev141.20101-13-27.1	Amy R. Author UNITED STATES	Testing to Make sure Unique Email ISN't Required On This Paper	Rapid Review		red;green	30: Drumming 40.100: Goaltending 40.154: <i>Felix Potvin</i> 40.155: <i>Curtis Joseph</i>		Batch Task Assigned		May 16 2017 2:29:26:307PM	Jul 12 2017 1:38:39:560PM	Aug 4 2017 12:00:00:000AM	Genealogy Division
<input type="checkbox"/>	Go to Submission	LARGESITECLONE	ONE-D-16-2106	10.1371/journal.pone.0162106	José Devís-Devís	Correction: Does Sedentary Behavior Predict Academic Performance in Adolescents or the Other Way Round? A Longitudinal Study	Author Correction					Production Accept; Sent to Composition		Jun 1 2016 6:57:53:540PM	Jun 14 2016 5:50:45:700PM		

Batch Assign Production Task



EV Save Search

- User can Save the search and display it on the EV Menu
 - Note: Saved EV searches cannot be shared with other users

The image shows a 'Save Search Criteria' dialog box overlaid on a web application interface. The dialog box contains the following elements:

- Title:** Save Search Criteria
- Instructions:** Check the provided checkbox and click the "Submit" button again to overwrite the existing search with this one. Alternatively, enter a new name for your saved search before proceeding.
- Criteria:** Manuscript Number is containing '10'
- Search Criteria Name:** Stacey's Search
- Checkbox:** Show this Search in Enterprise View Menu
- Buttons:** Cancel, Submit
- Navigation:** Back to Search Results, Enterprise View Menu, New Search, Editor Main Menu, Production Tasks Menu, Production Status Grid

The background interface shows the 'Enterprise View' menu with the following sections:

- Managing Editor Enterprise View Menu:** Quick Searches: Stacey's Search, Submission Search 101
- Enterprise View Search:** Search Submissions
- Enterprise View To-Do List:** Submission Tasks Assigned to Me (22), Schedule Group Tasks Assigned to Me (2)



Cross-Publication Batch Task Assignment

- EV supports batch task assignment from EV Search Results
- Users can batch assign tasks in a single workflow cross-publication

Batch Assign Production Tasks

Please click 'Proceed' for the publication on which you wish to batch assign production tasks.

Publication Code	Publication Name	Submissions Selected	
SALLYDEV151	Sally's Test Site	3	Proceed
STACEYDEV151	Stacey's Test Site with a Really Long Journal Name	6	Proceed
TONYDEV151	Tony'sTest Site	1	Proceed

[Return to Search Results](#)
[Enterprise View Menu](#)



Cross-Pub Batch Task Assignment

- User steps through the selection of task and assignee, letter customization, upload of files
- On the confirmation page, there are navigation links to keep the user in “EV mode” and proceed with batch assignment on the next publication

Batch Assign Production Task Confirmation - vijaydev16018

Baker Kim has been assigned the production task Format Manuscript for the following submissions. A letter was sent:

- Manuscript Number: TEST100001, DOI: chrisdev91.160. Flick T. Ant (UNITED STATES): "TEST 1: 12.0-32 - 001"

[Return to Select Publication Page](#)

[Return to Search Results](#)

[Enterprise View Menu](#)
[Production Status Grid](#)
[Production Tasks Menu](#)
[Main Menu](#)



Cross-Pub Batch Task Assignment

- Clear indication of what is complete and what is left to do

Batch Assign Production Tasks

The assignments resulting from your search query are complete.

Publication Code	Publication Name	Submissions Selected	
<i>SALLYDEV151</i>	<i>Sally's Test Site</i>	-	<i>Complete</i>
<i>STACEYDEV151</i>	<i>Stacey's Test Site with a Really Long Journal Name</i>	-	<i>Complete</i>
<i>TONYDEV151</i>	<i>Tony's Test Site</i>	-	<i>Complete</i>

Return to Search Results
Enterprise View Menu



EV Phase 2

Currently in development



Phase 2 – Version 17.0

- Currently in development, this extends the functionality to five new folders from To-Do and Overview sections.

The screenshot displays a web application interface with a top navigation bar containing tabs for 'Editorial', 'Proposal Menu', 'Tasks', and 'Enterprise View'. The 'Enterprise View' tab is active. On the left, a sidebar titled 'Managing Editor Enterprise View Menu' includes a 'Quick Searches:' section with a link for 'Submission Search 101'. The main content area features three sections: 'Enterprise View Search' with a 'Search Submissions' link; 'Enterprise View To-Do List' with links for 'Submission Tasks Assigned to Me (12)', 'Schedule Group Tasks Assigned to Me (1)', and 'At-Risk Submissions (20)'; and 'Overview' with links for 'Production Initiated – No Tasks Assigned (3)', 'Submission Tasks I Have Assigned (32)', 'View All Submissions in Production (30)', 'View All Tasks With Authors (6)', and 'Production Status Grid'. A yellow box highlights the 'At-Risk Submissions (20)' link in the To-Do List and the entire Overview section.



EV Phase 3

Currently scheduling



Phase 3 – Remaining PM Functionality

Submissions

- Production Status Grid
 - Tricky. How to harmonize workflows across publications?
- View All Submissions in TaskManager
- Active Linked Submissions

Schedule Groups

- SG Tasks I have Assigned
- Manage Schedule Groups

Searching

- Sharing EV Searches
- People?



EV Phase 3++

Bringing EV to EM...



Submissions With:

0 Reviews
Complete
1

1 Reviews
Complete
0

2 Reviews
Complete
0

3 Reviews
Complete
0

4 Reviews
Complete
0

Search

[Search Submissions](#) | [Search People](#)

Editor 'To-Do' List

My Pending Assignments (64)

[New Submissions](#) (23)

[Revised Submissions](#) (5)

[New Submissions Requiring Assignment](#) (3)

[Revised Submissions Requiring Assignment](#) (0)

[Submissions Needing Approval by Editor](#) (1)

[Submissions Sent Back to Author for Approval](#) (12)

[Incomplete Submissions](#) (14)

[Submissions with Rescinded Decision](#) (5)

[Submissions with Required Reviews Complete](#) (35)

[Submissions Requiring Additional Reviewers](#) (8)

[Submissions with One or More Late Reviews](#) (6)

[Submissions with Active Discussions](#) (2)

Reviews in Progress (7)

[Reviewers Invited - No Response](#) (2)

[Submissions Under Review](#) (6)

View All Assigned

[View All Assigned Submissions](#) (90)

[View All Assigned Submissions being Edited](#) (26)

Subordinate Editor's Pending Assignments (79)

[Group by Editors I Assigned](#)

[Group by Editor with Current Responsibility](#)

[Group by Manuscript Status](#)

Submissions with Decisions

[Submissions out for Revision](#) (37)

[All Submissions with Editor's Decision](#) (7)

[All Submissions with Final Disposition:](#)

[Accept](#) (70), [Reject](#) (2), [Withdrawn](#) (18), [Transfer](#) (6)

[Completed Conference Submissions](#) (3)

[Withdrawn Conference Submissions](#) (0)

[My Assignments with Final Disposition](#) (2)

Linked Submission Groups

[Active Linked Submission Groups](#) (5)

[Inactive Linked Submission Groups](#) (0)



Roles?

- EV currently relies on Go To Publication list
 - Only Editor/Publisher Roles
- Role Priorities?
 1. Editor
 2. Publisher
 3. Reviewer?
 4. Author?
- We expect to work on Editor Role features next



Handoff Folders: Where Production is Initiated

- All Submissions with Editor's Decision
- All Submissions with Final Disposition
 - Accept
- Accepted Submissions (Publisher Role)



Journal Office functions

- New/Revised Submissions/ Requiring Assignment (x4)
- Direct-to-Editor New Subs.
- Sent Back to Author
- With Rescinded Decision
- Incomplete/Needing Approval
- Out for Revision?

Editor 'To-Do' List

My Pending Assignments (64)

- New Submissions (23)
- Revised Submissions (5)
- New Submissions Requiring Assignment (3)
- Revised Submissions Requiring Assignment (0)
- Submissions Sent Back to Author for Approval (12)
- Incomplete Submissions (15)
- Submissions with Rescinded Decision (5)
- Submissions with Active Discussions (2)

Submissions with Decisions

- Submissions out for Revision (37)
- All Submissions with Editor's Decision (7)
- All Submissions with Final Disposition:
 - Accept (70)
 - Reject (2)
 - Withdrawn (18)
 - Transfer (6)



In-Chain Editor Pending Assignments

- New Invitations/Assignments
- With Required Reviews Complete
- Requiring Additional Reviewers
- With Late Reviews
- With Active Discussions

Editor 'To-Do' List

My Pending Assignments (57)

- Submissions Needing Approval by Editor (1)
 - New Invitations (4)
 - New Assignments (4)
 - Submissions with Rescinded Decision (5)
 - Submissions with Required Reviews Complete (35)
 - Submissions Requiring Additional Reviewers (8)
 - Submissions with One or More Late Reviews (6)
 - Submissions with Active Discussions (2)

Reviews in Progress (7)

- Reviewers Invited - No Response (2)
- Submissions Under Review (6)



Overview Folders (by Section)

- Remaining 'To-Do' folders:
 - Reviewers Invited no Response
 - Submissions Under Review
- View All Assigned
- Subordinate Editor's Pending Assignments
- Submissions with Decisions
 - Maybe omit some as completed
 - Cf. Handoff folders
- Linked Submission Groups

Reviews in Progress (7)

- Reviewers Invited - No Response (2)
- Submissions Under Review (6)

View All Assigned

- View All Assigned Submissions (90)
- View All Assigned Submissions being Edited (26)

Subordinate Editor's Pending Assignments (23)

- Group by Editors I Assigned
- Group by Editor with Current Responsibility
- Group by Manuscript Status

Submissions with Decisions

- Submissions out for Revision (37)
- All Submissions with Editor's Decision (7)
- All Submissions with Final Disposition:
 - Accept (70), Reject (2), Withdrawn (18), Transfer (6)
- My Assignments with Decision (21)
- My Assignments with Final Disposition (49)

Linked Submission Groups

- Active Linked Submission Groups (5)
- Inactive Linked Submission Groups (0)



Over to You

What do you want to see next?



What to prioritise, Cross-Publication?

- Sharing EV Searches
- Roles other than Editor?
- Folders where Production is initiated
- Journal Office Features (receiving Submissions, Notifying Authors)
- To-Do Folders for Editors in Decision Chain (Reviewers & Decisions)
- Journal Overview/Submissions by Editor Folders
- Search People Cross-Publication
- Your suggestions for new features?



Submissions With:

0 Reviews
Complete

1

1 Reviews
Complete

0

2 Reviews
Complete

0

3 Reviews
Complete

0

4 Reviews
Complete

0

Search

[Search Submissions](#) | [Search People](#)

Editor 'To-Do' List

My Pending Assignments (64)

[New Submissions](#) (23)

[Revised Submissions](#) (5)

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