



# Editorial Manager<sup>®</sup>

## Author Functionality Checklist

✓	HTTP or secure HTTPS-based system with <a href="#">encrypted passwords</a> .
✓	Security rules for log-in and user record editing based on publisher policy.
✓	Online Author help screens.
✓	Authors can register themselves on the system or can be pre-registered by the Editorial Office.
✓	Authors can enter personal identifiers such as ORCID, ISNI, PubMed Author ID, Researcher ID, and Scopus Author ID (as permitted by journal).
✓	Authors and Co-Authors can be prompted to register for a new ORCID (using the ORCID API).
✓	Authors can use their ORCID username and password as a <a href="#">Single Sign On (SSO)</a> option between different journals.
✓	Authors registering with their ORCID iD can opt to <a href="#">pull profile information from their ORCID record</a> in to EM.
✓	System supports secondary fields for Author information so that international Authors can enter alternative names or translated addresses.
✓	Author registrations are checked for duplicates.
✓	Authors can select their own username and password.
✓	Authors see registration instructions that have been customized by the Editorial Office.
✓	Authors can specify alternate email address and contact information.
✓	Authors can provide multiple email addresses to ensure receipt of system and journal emails.
✓	Authors can indicate unavailability dates.
✓	Authors see their submissions displayed in a modern, <a href="#">streamlined customizable grid</a> .
✓	Corresponding Authors benefit from <a href="#">metadata extraction of manuscript title, abstract, authors and affiliations from uploaded Word document file</a> to auto populate submission fields.
✓	Authors and Co-Authors can identify their institutional affiliation from a <a href="#">standardized list of institutional names (Ringgold)</a> . Institutional names auto-complete as the Author types.
✓	Authors can submit their own funder information, as well as Co-Author funder information using the <a href="#">Open Funder Registry</a> with sub-agencies.
✓	Authors see different (customizable) <a href="#">submission instructions</a> for a revised submission than for an original submission.
✓	Authors can respond to submission questions configured by the Editorial Office, which can be made mandatory.

✓	Author submission question/answer formats can include radio buttons, drop-down lists, dates, free text, check boxes, etc.
✓	Authors and Co-Authors can be directed to publication-customized web forms to complete multi-part journal questions (e.g. ICMJE form).
✓	Editorial Office can specify that submission steps are mandatory or optional, and limit number of choices or characters allowed for responses.
✓	Editorial Office can configure the inclusion/exclusion of submission steps based on article type.
✓	Editorial Office can specify that some submission items (e.g. revision cover letter) are only required for a revised submission.
✓	Manuscript revision number is automatically appended to the PDF submission file name for simple differentiation from previous versions.
✓	Editorial Office can configure the manuscript upload page to allow different submission items for each article type (e.g. Manuscript, Images, Tables, Rebuttal letter, etc.).
✓	Editorial Office can specify which submission items are required for submission.
✓	Editorial Office can require Authors to read “user terms and conditions” and choose whether or not to opt-in for special offers.
✓	Authors can easily insert special characters (unicode-compliant) from a pop-up window, including superscript and subscript numbers.
✓	Authors can select article type (e.g. Original Study, Book Review, etc.) from a publication-defined list.
✓	Authors <a href="#">can add Co-Authors</a> with their academic affiliations, contributor identifiers (such as ORCIDs) and contact email addresses.
✓	Contributor Roles from the <a href="#">CRediT Taxonomy</a> can be assigned to Authors and Co-Authors at submission.
✓	Authors can re-sequence list of Co-Authors.
✓	Submitting Author can designate a Co-Author to be the “Corresponding Author.”
✓	“First Author” and “Corresponding Author” can be designated separately.
✓	Authors can select their own keywords that describe the submission.
✓	Authors can select their own keywords that describe their area of expertise.
✓	Authors can easily select from a publication-defined list of keywords displayed in a multi-level hierarchy configured by the publication.
✓	Authors can suggest or oppose Reviewers during manuscript submission.
✓	Authors can enter comments or a cover letter.
✓	Editorial Office can configure the interface to allow the Author to select a particular Editor or journal section.
✓	Authors can upload a wide variety of file formats for conversion into a PDF file (Word, WordPerfect, Text, RTF, TeX, EPS, LaTeX, PDF, GIF, JPEG, TIFF, PowerPoint, Excel, OpenOffice, etc.).
✓	Authors can upload one or multiple files using <a href="#">drag-and-drop</a> .
✓	Authors can upload supplementary materials (e.g. audio and video files), and files that are associated with the submission but not part of the manuscript.
✓	Authors can <a href="#">upload URL/URIs to point to supplementary materials</a> on other systems (such as Figshare or Dryad).
✓	Author’s uploaded files can be automatically sequenced according to publication-defined preference.
✓	Authors can upload single or multiple files in a single compressed (zip) format.
✓	Authors can conveniently categorize multiple uploaded files (e.g. images).
✓	Authors have a clear and easy way to submit a revised manuscript without having to resubmit all metadata and files.
✓	Authors add their own text label (e.g. Fig #) to each submitted item.
✓	Authors can indicate that an item will be submitted offline.
✓	Authors can enter metadata into fields such as Figure Number and Figure Legend when uploading a figure file (configured by the journal based on article type).
✓	Authors can re-sequence the items that are built into a single submission PDF.
✓	Author-entered submission metadata (e.g. Abstract, Title, Short Title, etc.) can be limited by number of characters or words.
✓	Authors can enter secondary manuscript information such as translated versions of submission titles.

✓	If an Author is interrupted, the system <a href="#">automatically saves the partially completed submission</a> for later completion.
✓	All Author submission items are virus-checked.
✓	Author sees interactive feedback about submitted files.
✓	PDF version of submission includes links back to the original high-resolution items submitted by the Author.
✓	PDF includes “header” information so that it can be identified from web site after downloading.
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✓	Authors receive an email when the submission has been received by the Editorial Office.
✓	Authors can <a href="#">check on the status of a submission</a> at any time.
✓	The status term seen by the Author is configured by the journal according to what the Editorial Office wants the Author to see.
✓	Authors may be <a href="#">invited</a> to submit papers or commentaries on previously submitted papers.
✓	Authors of “invited” and “revised” manuscripts are warned of potential duplication if they try to upload a new manuscript rather than proceed with those pending.
✓	Authors can respond to <a href="#">“invited” manuscripts or books content</a> , such as chapters, by clicking on deep links in invitation emails without having to log into the system.
✓	Invited Authors can receive automated reminders before and after due dates.
✓	Submission can be “bounced” back to Author for re-submission following inspection and/or editing by the Editorial Office.
✓	Emails to Authors can include <a href="#">electronic calendar entries</a> (using the iCalendar file format standard) so that Author due dates can be easily tracked in their electronic calendar.
✓	Authors can respond to Reviewers’ comments. Those responses are recorded in the system.
✓	(For journals using Open Peer Review workflows), Authors can see Reviewer identifying information.
✓	Authors can be given access to the <a href="#">Similarity Check</a> results for their manuscript right from user interface.
✓	Authors in materials science can make use of <a href="#">integration with the iUCR’s crystallography file validation</a> tool, checkCIF.
✓	Authors can review predictive bibliometrics reports to gain insight into potential future citation patterns for their work.
✓	Authors can see individual Reviewer responses to Reviewer form questions, if permitted by journal.
✓	If permitted by the Editorial Office, Authors can view files attached by Reviewers and Editors.
✓	Revised manuscript number includes a revision suffix (R1, R2, etc.) to indicate the revision number.
✓	Authors can receive automated reminders about revision due dates.
✓	Authors have access to prior revisions of the submission.
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✓	Authors can be granted access to search a variety of third-party bibliographic databases (such as PubMed, Google Scholar, etc.). Search queries can be configured to automatically use title, keywords or Author names as the search criteria.
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✓	Authors can submit to journals using EM from third party tools and services including <a href="#">Overleaf</a> and the preprint server <a href="#">bioRxiv</a> .

✓	Authors can provide submission metadata including responses to custom questions via third party tools and services (rather than logging in to EM).
✓	Authors can manage revisions and transfer offers via third party tools and services (rather than logging in to EM).
✓	When submitting through a third-party system, such as a Manuscript Service Provider, Authors can view and manage submission communications directly through the Service Provider or Author Portal.
✓	Author manuscripts can be processed using <a href="#">Similarity Check</a> to identify potential plagiarism. (Additional charges apply).
✓	Author can submit a letter-to-the-Editor and view the Editor's response to their letter and other related letters.
✓	Author submission <a href="#">can be transferred</a> between co-operating Editorial Manager publications and non-Editorial Manager publications.
✓	In the case of manuscript transfer, Authors can agree/decline the transfer invitation and select the target journal (based on publisher policy).
✓	Authors benefit from MECA-compliant import/export transmittal, enabling standard transfer across major submission systems.
✓	Authors have access to manuscript correspondence history from their home page (subject to Editor configuration).
✓	Authors can agree and process article publication charges (APCs) during manuscript workflow using external processors such as <a href="#">CCC's RightsLink</a> .
✓	APC processing supports <a href="#">variable pricing based on manuscript parameters</a> (such as Author country, Author institution etc.) and waiver requests, memberships, discounts, etc.
✓	Authors can view publication-posted messages on their home page.
✓	Other Authors on a submission may be asked to verify that they contributed to the paper.
✓	Other Authors identified on a paper may be asked to register, allowing them visibility into the status of the paper as it goes through the process.
✓	Co-Authors may be asked, via <a href="#">Co-Author verification</a> emails, to complete an Author questionnaire, validate or add an ORCID iD, and review CRediT roles assigned to them, as part of their verification process.
✓	Co-Author questionnaire responses can be shared with recipient journals when transferring a manuscript to eliminate rekeying of information.
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✓	Authors can be noted as "reliable" based on an <a href="#">Identity Confidence Check</a> rating.