Editorial Manager®

Author Functionality Checklist

✓ Security rules for log-in and user record editing based on publisher policy.

✓ Authors are alerted to time zone differences.

✓ Authors can register themselves on the system or can be pre-registered by the Editorial Office. Author registrations are checked for duplicates.

✓ 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.

✓ Authors can use their ORCID username and password as a Single Sign On (SSO) option if enabled by the journal.

✓ Authors registering with their ORCID iD can opt to pull profile information from their ORCID record in to EM.

✓ System supports secondary fields for Author information so that international Authors can enter alternative names or translated addresses.

✓ Authors can select their own username and password. Login credential requirements are configured by the journal.

✓ Authors follow registration, submission, and revision instructions as customized by the Editorial Office.

✓ Authors can specify alternate email addresses and contact information.

✓ Authors can indicate unavailability dates.

✓ Authors can view their submissions displayed in a modern, customizable grid interface.

✓ Authors save time during submission with the automated extraction of manuscript metadata and pre-population of submission fields, including manuscript title, abstract, corresponding Authors, affiliations, and keywords, via Xtract feature.

✓ Authors and Co-Authors can identify their institutional affiliation from a standardized list of institutional names via Ringgold integration.

✓ Authors can submit their own funder information, as well as Co-Author funder information, using the Funder Registry with sub-agencies.

✓ Authors can respond to submission questions configured by the Editorial Office, which can be made mandatory. Question and 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 which submission steps are mandatory or optional, and limit number of choices or characters allowed for specific responses or fields.

✓ 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 can add Co-Authors with their academic affiliations, contributor identifiers (such as ORCIDs) and contact email addresses.

✓ Contributor Roles from the CRediT Taxonomy 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.

✓ If not automatically extracted upon submission, Authors can select their own keywords that describe the submission and their area of expertise. They can also 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 supplementary materials (e.g. audio and video files), and files that are associated with the submission but not part of the manuscript.

✓ Authors can add URL/URIs to point to supplementary materials, or directly upload data sets to external systems and repositories, 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 submission or companion file (configured by the journal based on article type).

✓ Authors can re-sequence the items that are built into a single submission PDF.

✓ Authors can enter secondary manuscript information such as translated versions of submission titles.

✓ If an Author is interrupted, the system automatically saves the partially completed submission for later completion.

✓ All Author submission items are virus-checked.

✓ Author can view 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 website after downloading.

- ✓ The PDF manuscript generated from the Author's submission file preserves HTML links.

- ✓ Authors are required to check PDF before final submission to the Editorial Office.

- ✓ Authors receive an (publication-configured) email indicating the availability of the PDF.

- ✓ Authors receive an email when the submission has been received by the Editorial Office.

- ✓ Authors can check on the status of a submission at any time. Status terms seen by the Author are configurable by the Editorial Office.

- ✓ Authors may be invited to submit papers or commentaries on previously submitted papers, and may respond by clicking on deep links within email invitations without needing to log into the system.

- ✓ 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 receive automated reminders before and after revision due dates, as well as reminders to take action on abandoned submissions or submissions that require further action.

- ✓ Submission can be "passed" back to Author for re-submission following inspection and/or editing by the Editorial Office.

- ✓ Authors can respond to Reviewers' comments, and responses are recorded in the system.

- ✓ Authors can see Reviewer identifying information for journals using Open Peer Review workflows.

- ✓ Author manuscripts can be processed using Similarity Check to identify potential plagiarism, and can be provided access to the results for their manuscript.

- ✓ Authors in materials science can make use of integration with the iUCR's crystallography file validation 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 have access to prior revisions of the submission.

- ✓ Authors receive the Editor decision letter, which are configured by the Editorial Office, via email.

- ✓ Authors' image files can be processed through automated quality checking to validate against publication defined requirements for image publication.

- ✓ Authors' manuscript and images can be optionally overlaid with line numbers.

- ✓ Authors' submitted bibliographies can be automatically linked to PubMed and Crossref, and formatted to the publication's preferred style via integrated Reference Check tool.

- ✓ The system automatically detects and corrects some errors in Author-submitted bibliographies. (For example: insufficient Authors listed before "et al" or missing volume numbers).

- ✓ 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.

- ✓ Authors have access to send ad hoc emails (which are recorded in the system) to Editorial staff. Editorial Offices can configure an unlimited number of ad hoc emails that include merge fields to automatically display data such as the manuscript number and title.

- ✓ Authors can indirectly submit manuscripts to journals from third party preprint servers and manuscript preparation services, including Overleaf and bioRxiv, via the EM ingest service. Third party system must be an ingest partner with Aries Systems.

- ✓ 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 can submit a letter-to-the-Editor and view the Editor's response to their letter and other related letters.

- ✓ Author's manuscript and files can be seamlessly transferred to another publication via MECA-compliant standardized transmittal, regardless if the receiving publication utilizes Editorial Manager or another peer review system.

- ✓ In the case of manuscript transfer, Authors can agree/decline the transfer invitation and select the target journal (based on publisher policy).
- ✓ Authors have access to manuscript correspondence history from their home page (subject to Editor configuration).
- ✓ Authors can process publication charges (such as APCs) via external fee processing tools such as CCC's RightsLink® and Aptara's SciPris. This includes viewing estimates and facilitating payment at various workflow stages (triggers configured by the Editorial Office).
- ✓ APC processing supports variable pricing based on manuscript parameters (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 identified to be associated on a submission may be asked to verify that they contributed to the paper. Editors can also update verification status on Co-Author's behalf.
- ✓ Co-Authors verification can be ingested into Editorial Manager if the Author confirmed co-authorship of a submission via a third-party submission partner.
- ✓ Other Authors identified on a paper may be asked to register to the system, allowing them visibility into the status of the paper as it goes through the process.
- ✓ Co-Authors may be asked, via Co-Author verification 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.
- ✓ Authors can click a "Manuscript Services" icon displayed within the Editorial Manager home or login interfaces to be referred to manuscript preparation services partnered with Aries Systems.
- ✓ Authors are protected under the General Data Protection Regulation (GDPR) and are able anonymize their user records.
- ✓ Authors can be noted as "reliable" based on an Identity Confidence Check rating.
- ✓ Collaborative Author Groups will automatically be identified and extracted from the manuscript file during submission. Authors can enter and edit Collaborative Author Groups manually, as configured by article type by the Editorial Office.
- ✓ Authors can directly submit manuscript metadata to SciScore from Editorial Manager, which automatically generates a reproducibility score and report for enhanced transparency and rigor of scientific research.
- ✓ Authors can seamlessly submit conflicts of interest (COI) to centralized, external repositories, such as Convey.
- ✓ Authors' manuscripts can be automatically evaluated against several technical metrics (set by the Editorial Office) to gauge their suitability for the journal via an integration with UNSILO's Technical Check tool.
- ✓ Authors' research citations can be automatically evaluated for validity against published supporting or disputing evidence, in addition to known withdrawals or retractions, via an integration with scite's Reference Check tool.
- ✓ Authors that use the WeChat application can conveniently check the status of their submitted manuscript in EM from the publisher's WeChat account via an integration with the Charlesworth WeChat Gateway.