



Editorial Manager[®]

Editorial Office Functionality Checklist

✓	Editorial Office can display system login box on any web page, such as the journal online site.
✓	For convenience, Editorial Office staff can use their ORCID username and password for single-sign-on (SSO) across multiple journals.
✓	Editorial Office uses web-based administration tools to control user roles and permissions.
✓	Journal office can select security rules for log-in and user record editing based on publisher policy.
✓	Editorial Office uses web-based tools to set up template letters with appropriate merge fields.
✓	Editorial Office can “trigger” letters by associating template letters with specific system events.
✓	Editorial Office can configure dozens of graphical “flags” to display next to the manuscript which indicate action items and idiosyncrasies at-a-glance.
✓	Submission “flags” can be associated with specific metadata entries, including custom question responses.
✓	Editors can create and save searches for submissions with specific “flags.”
✓	Editors can view when a particular flag was turned on or off within submission history.
✓	Editorial Office sees “Search Submissions – Results” and “Saved Search Results”, in the modern, streamlined, PowerGrid . PowerGrid allows users to resize, re-order, lock, and include/exclude data columns according to personal preference.
✓	Editorial Office can receive new manuscript submissions from Authors, or manuscripts can be automatically assigned to Editors based on journal section or Editorial role.
✓	Editorial Office can “bounce” submissions back to Authors for resubmission (for clean-up, missing materials, etc.).
✓	Editorial Office can edit submissions prior to assignment to an Editor, or “bouncing” them back to the Author.
✓	Editorial Office can remove spurious or test submissions and no submission charge is made for such removed submissions.
✓	Early decisions (“desk reject”) can be made without Editor assignment.
✓	Editorial Office can easily “proxy” transactions on behalf of Authors, Reviewers, and Editors.
✓	Authors can be required to explicitly agree to configurable Editorial Office policies and terms via an “I accept” checkbox.
✓	Editorial Office can easily register new users. Editorial Office has tools to identify and merge duplicate user records.
✓	When assigning manuscripts to Editors, the Editorial Office can see information about the Editor’s availability and current assignments.
✓	Editorial Office can configure submission steps to capture Author recommended and/or opposed Reviewers.

✓	Editorial Office can configure Editor chains , thereby allowing assignment to multiple Editors in a single step. Configurable by article type.
✓	Editorial Office can swap one Editor for another without disrupting the rest of the configured multi-Editor chains.
✓	Editorial Office can prevent an Editor from having access to a submission, if that Editor was a contributing Author for that submission.
✓	Editorial Office can filter Editor searches by unavailable dates.
✓	Editorial Office can configure Author submission questions that include radio buttons, drop-down lists, dates, free text, check boxes. Questions can be mandatory for new or revised manuscripts and can be limited by word or character count. Questionnaires are configurable by article type. Two Author questionnaires can be used during the workflow of a manuscript: one containing submission-related questions and one containing Author- and Co-Author questions.
✓	Editorial Office can associate metadata identifiers with data elements, such as custom questions and submission types to facilitate smooth transfer of manuscript data between journals and platforms (such as publisher portals or third-party author services and tools).
✓	If Authors are using an Author Portal or Manuscript Service provider for submission, Editorial Office can send communications to Authors for display directly in the provider interface.
✓	Editorial Office can copy custom questions to quickly and easily build new, similar custom questions without rekeying.
✓	Editorial Office can track submissions using a Global MS ID field for transferred submissions. Unique IDs travel with submissions through the peer review lifecycle.
✓	Editorial office can use MECA-compliant import/export transmittal, enabling standard transfer across major submission systems.
✓	New manuscripts can be sent to Editors by assignment or invitation.
✓	Editorial Office can select from a variety of manuscript numbering options (automatic or manual).
✓	Manuscript numbers reflect revision status (e.g. R1, R2, etc.).
✓	Manuscript numbers can be assigned at new submission, or at time of first Editor assignment.
✓	Revised manuscripts are clearly identified in the system, and can follow different workflows.
✓	Editorial Office can configure which user registration fields are mandatory or optional. Users can be forced to respond to new questions upon login.
✓	Editorial Office can prompt users to register with multiple email addresses to minimize the chances of spam blocking.
✓	Email content can be in Unicode format.
✓	Editorial Office can configure the terms used to describe the manuscript status.
✓	Editorial Office can configure manuscript status terms seen by Author to be different to internal status descriptors.
✓	Editorial Office can use web-based administration tools to configure their own article types and specify workflow parameters based on article type.
✓	Editorial Office can configure article types that are only used internally by Editors for expedited submission and processing without peer review.
✓	Editorial Office can configure the system to capture personal identifiers such as ORCID, ISNI, PubMed Author ID, Researcher ID, and Scopus Author ID.
✓	Personal identifiers such as ORCID can be required or optional ; and can be solicited from Authors, Co-Authors, Reviewers and Editors. Editorial Office can also hide ORCID solicitation.
✓	Editorial Office can manage and “fetch” ORCIDs for users.
✓	Editorial Office can hide, request or require ORCID solicitation for specific article types through configuration.
✓	Editorial Office can determine what submission items (e.g. images, tables, supplementary item, video, etc.) can be uploaded by the user for each article type.
✓	Editorial Office can determine that some items (e.g. data sets, videos, etc.) are submitted as URL/URIs pointing to files on external systems such as Dryad or FigShare .
✓	Editorial Office can configure uploaded compressed (ZIP) files to be automatically unpacked, or to remain compressed.
✓	Editorial Office can configure their own classification (keyword) terms used to identify manuscripts and Reviewer expertise . Keywords can be organized into an unlimited number of levels and ordered by number or alphabetically.
✓	Editorial Office can permit Authors and Reviewers to enter free-form keywords.

✓	Editorial Office can activate Reviewer Discovery , enabling Editors to search and select candidate Reviewers from an external database of 3.5 million scholar profiles, including biographical information and publication history.
✓	Editorial Office can select and implement an External Reviewer Database to use for Reviewer search (such as a third-party or in-house database).
✓	Editorial Office can configure Reviewer form questions that include radio buttons, drop-down lists, dates, free text, check boxes, etc. Questions can be mandatory for new or revised manuscripts and can be limited by word count or character count. Questionnaires are configurable by article type and Reviewer role.
✓	Editorial Office can rank suggested Reviewers by the order the Reviewer should be invited .
✓	Editorial Office can configure multi-part web forms for completion by the corresponding Author and by individual Co-Authors (e.g. ICMJE form).
✓	Editorial Office can manage form completion process and can delegate visibility to corresponding Author to chase Co-Authors.
✓	Editorial Office can configure automatic Author and Co-Author form completion reminders .
✓	Editorial Office can configure Co-Author verification emails that include deep links allowing Authors to confirm their participation, authenticate or provide their ORCID iD, and/or review the CRediT roles assigned to them by a corresponding Author.
✓	Editorial Office can configure the system with its own Reviewer and Editor decision terms.
✓	Editorial Office can configure multiple email letter options for each decision term and revision.
✓	Editorial Office can configure specific Author revision deadlines for each revise family decision term.
✓	Editorial Office can ensure that communication from Editors maintains a consistent voice by quickly inserting publication-defined decision phrases into letters.
✓	Editorial Office can configure customized fields for manuscripts (including text, numeric, date, or drop-down lists).
✓	Editorial Office can configure customized fields for user records (including text, numeric, date, or drop-down lists).
✓	Editorial Office can configure submission metadata (e.g. abstract, title, short title, etc.) to be limited by number of characters or words.
✓	Editorial Office can request or require corresponding Authors to assign contributor roles to each Co-Author using the CRediT taxonomy .
✓	Emails sent by the system are from a publication-configured email address or from a designated “corresponding Editor” email address.
✓	Editorial Office can configure its preferred date and time format.
✓	Editorial Office can determine which submission steps are shown to Authors during the submission process. Different submission steps can be defined for a new or revised manuscript per article type.
✓	Editorial Office can check on the status of manuscripts assigned to Editors.
✓	Editorial Office can produce and send customized Reviewer reminder email letters . Rich Text email letters can be customized “on-the-fly” using a graphical interface for bolding, list, italics, etc.
✓	Editorial Office can configure an unlimited number of automated reminders that will automatically be emailed to Reviewers X days prior or after invitation/acceptance of review task.
✓	Editorial Office can configure outbound emails to include automatic calendar updates (iCal) for enhanced deadline management.
✓	Editorial Office can configure email letters to include automatic CC and BCC.
✓	Editorial Office has the option to edit email letters before resending them.
✓	Editorial Office can group manuscripts by the Editor who is currently responsible for the manuscript.
✓	System can be configured such that the Editorial Office sends out final Editor decision letter.
✓	Editorial Office can configure default manuscript settings by article type, such as the number of required reviews, time allowed for Reviewer invitation acceptance, and time allowed for Reviewer recommendation.
✓	Editorial Office has low-level access to database tables to perform searches and extract data in a standard format.
✓	Editorial Office staff can be granted access to reports and statistics.
✓	Reports can be displayed in graphical format such as graphs, charts and gauges.
✓	Reporting can reflect a single journal or include cross-publication data; reports can be sent via SFTP, email attachment, and XML file format.
✓	Editorial Office can easily modify and save standard reports.

✓	Editorial Office can use a Web-based reporting tool that facilitates data selection, manipulation and presentation.
✓	Reports can be emailed to Editorial Office staff and Editors according to a configurable schedule (e.g. weekly).
✓	Editorial Office can create custom reporting groups of journals such as “OA Journals” or “North American Journals.”
✓	Editorial Office reporting based on journal groupings can be shared with certain Editors.
✓	Editorial Office has access to standard reports such as the Journal Accountability Report that includes Journal Turnaround Time, Reviewer Statistics, Decision Summary, and Correspondence History (please contact us for a full list of reports).
✓	Editorial Office can quickly surface review status , including expandable details and color coding.
✓	Editorial Office staff can invite Reviewers that have been “proposed” by Editors. Editorial Office can configure which Editors can propose and/or invite Reviewers.
✓	Editorial Office can identify “alternate Reviewers” who will be automatically invited to submit a review if specific designated Reviewers decline their invitation.
✓	Editorial Office is able to search and edit people notes , including the ability to add people-specific notes to people records, and URLs pointing to external resources, and to audit who enters comments and when.
✓	Editorial Offices with multiple journals can share people notes cross-journal.
✓	Editorial Office can download people search results.
✓	Editorial Office can configure hundreds of graphical “flags” to associate information with people records.
✓	Editorial Office can search people “flags.”
✓	Editorial Office can search manuscript notes.
✓	Editorial Office can customize and send batch emails to registered users.
✓	Editorial Office can view a full audit trail of status changes and correspondence history for any manuscript.
✓	Editorial Office can initiate Author rebuttals, even after a final decision has been made.
✓	Editorial Office can append or make corrections to Reviewer comments following decision.
✓	For journals operating with large numbers of Editors, the system can be configured to suggest and manage Editor assignment in an automated manner .
✓	Editorial Office can undo erroneous Editor assignments. In-process submissions can be “rolled back” to prior Editors or switched to alternative Editors.
✓	Editorial Office can organize accepted articles into issues and tables-of-contents.
✓	Editorial Office can create customized “transmittal form” emails that are triggered upon acceptance of a manuscript.
✓	Editorial Office can configure which content, metadata, and Author source files are transmitted to the production tracking system or printer following final acceptance of a manuscript.
✓	Manuscript transmittal can be undertaken in a variety of XML formats including industry standard JATS 1.2 DTD and supports inclusion of Open Funder Registry data.
✓	Editorial Office can transmit book-related metadata using the Books Interchange Tag Suite (BITS) XML.
✓	Editorial Office can customize manuscript PDF watermarks with logos and other information.
✓	Editorial Office can customize which manuscript data, including submission questions and Author responses, appears on the PDF version of the manuscript cover page . Different article types can have different cover pages at submission and revision.
✓	Editorial Office can easily differentiate between revisions because PDFs include revision number in file name.
✓	Editorial Office can configure final disposition to automatically set to ‘Withdrawn’ after a set number of days passes on a submission where Author not responded to a revision request.
✓	Editorial Office can permit Authors to view individual Reviewer responses to Reviewer form questions.
✓	Editorial Office can configure HTML text to appear on system-generated PDFs that include links and formatting.
✓	Editorial Office can attach searchable manuscript-specific notes to submission records.
✓	Editorial Office can configure an unlimited number of automatic Editor reminder report emails that contain a “to do” list with color-coded signposting indicators.

✓	Editorial Office can empower Editors to quickly establish which folders and submissions require attention based on color-coded indicators.
✓	Editorial Office can generate reports detailing outstanding Author revisions and configure an unlimited number of Author reminders that will be sent by the system prior or following Author due dates.
✓	Editorial Office can customize the instructions displayed for Authors when they first register on the system.
✓	Editorial Office can post a customized message on the Author home page .
✓	Editorial Office can view the results of artwork quality testing for image files uploaded by Authors. Artwork testing results can be incorporated into email letters using merge fields.
✓	Editorial Office can create proposals and assign them to Editors for Author invitation.
✓	Editorial Office can select “alternate Authors” who will be automatically invited to make a submission if earlier invited Authors decline invitation.
✓	Editorial Office can run reports and send automated reminders to Authors with respect to invited submissions.
✓	Editorial Office can configure colors to be associated with each submission item type, thereby facilitating file management.
✓	Editorial Office can configure the collection of metadata associated with each Author submission item. For example, figure legend, number, type or permissions could be captured.
✓	Editorial Office can configure the short title field to be required or optional for Author submission.
✓	When assigning a manuscript to an Editor, the Editorial Office can see the Editor’s current assignments and subject matter expertise.
✓	Editorial Office can test and correct users’ country registration information against the ISO 3166 country standard.
✓	Editorial Office can configure different Reviewer forms and instructions based on article type and Reviewer role.
✓	Editorial Office can configure different Editor forms and instructions based on article type and Editor role.
✓	Editorial Office can optionally allow the upload of attachments by Reviewers and Editors.
✓	Editorial Office can add a “late” review even if it is submitted after the review process has been closed.
✓	Manuscripts can be organized into customized “Region” lists (e.g. Europe) in addition to country designation.
✓	Editorial Office can designate that selected email letters are sent in Rich Text rather than plain text format so that they display images, formatting and branding.
✓	Editorial Office can configure unlimited links to third party bibliographic databases (such as PubMed, Google Scholar, etc.). Search queries can be configured to automatically use manuscript title, keywords or Author names as the search criteria.
✓	Editorial Office can configure an unlimited number of ad hoc emails to be sent by Authors, Reviewers and Editors . Ad hoc emails are automatically recorded in the system and can be configured to include merge fields that automatically import useful data such as manuscript number and title.
✓	Editorial Office can limit the ad hoc Editor letters available to specific Editor roles.
✓	Editorial Offices, and all workflow participants save time with email address autofill for ad hoc emails.
✓	Editorial Office can configure the system so that Author-submitted bibliographies are automatically linked to PubMed and Crossref, and formatted to the publication’s preferred bibliographic style. Automatic linking and formatting can be configured to occur on initial submission, revised submission, and/or final decision.
✓	The system automatically detects and corrects some errors in Author submitted bibliographies. (For example: insufficient Authors listed before “et al” or missing volume numbers).
✓	Editorial Office can configure user roles to permit switching between roles and default role selection for login convenience.
✓	Editorial Office staff can collapse and expand lists of manuscript records to facilitate viewing of long lists.
✓	Editorial Office can configure line numbering overlay on Author submitted items by uploaded item type.
✓	Editorial Office can configure a “technical check” workflow to ensure a manuscript meets minimum technical criteria before assignment to a content Editor.
✓	Editorial Office can make use of checkCIF for materials science and crystallography content to ensure the submitted CIF files are accurate prior to moving forward in the workflow.
✓	Editorial Office can configure a Reviewer thank you letter to be available following manuscript decision that includes publication-selected merge fields (such as the Editor’s comments to the Author and the decision term). This functionality can be configured to exclude Author names for publications running a “double blind” workflow.
✓	Editorial Office can group template letters into “letter families.” At key points in the workflow, Editors can select (and edit) from a list of

	appropriate publication-defined template email letters. For example, Editors can select from a list of Reviewer invitation letters based on article type or revision number.
✓	Editorial Office can configure Reviewer Invitation letters to include a merge field that allows Reviewers to accept the invitation and open the PDF in a single click .
✓	Editorial Office can configure secure Editor deep links so that Editors can perform assigned tasks simply by clicking links sent to them by email, without having to log into the system. This means the system is very easy and convenient to use, even for Editors who participate infrequently.
✓	Editorial Office can conveniently re-send emails from the manuscript's correspondence history.
✓	Editorial Office can conveniently add externally received emails to the manuscript correspondence record.
✓	Editorial Office can control the Editor's Reviewer search experience with customized instructional text and limited search options and criteria.
✓	Editorial Office can use the assignment status report to take appropriate actions such as inviting additional Reviewers or sending email reminders.
✓	Editorial Office can use the Reviewer performance report to generate detailed performance information for each Reviewer in the system. This data can be extracted for further manipulation in a desktop application such as Microsoft Excel.
✓	Editorial Office can configure the text that appears on the login and registration pages; and can upload a publication thumbnail graphic to appear on the login page. These changes can be made by the Editorial Office at any time without the cost or inconvenience of a software change request.
✓	Editorial Office can configure options for submission of Author manuscripts to Similarity Check for plagiarism checking . (Additional charges may be applied).
✓	Editorial Office can configure automatic upload of submissions for plagiarism (Similarity Check) checking based on workflow events (e.g. new submission, final acceptance, revised submission).
✓	Editorial Office can configure display of Similarity Check results to Authors and Reviewers.
✓	Editorial Office can grant Editors limited access to system configuration options (e.g. just the ability to edit template email letters).
✓	Editorial Office can limit or hide letter templates for Editors and Reviewers.
✓	Editorial Offices can centrally manage a master set of letter templates that can be shared across selected publications.
✓	Editorial Office staff can "link" submissions during workflow to ensure that they are edited, reviewed and published together. Submissions designated for joint publication can be linked with a unique group ID.
✓	In the case of linked submissions, the Editorial Office can permit sharing of Reviewer comments between linked submissions during Editorial workflow.
✓	Editorial Office staff can configure letter-to-the-Editor functionality to facilitate processing of multiple submitted letters and trafficking of comments to Authors, Reviewers and production.
✓	Editorial Office can configure the system to generate a unique DOI (Digital Object Identifier) for a submission during workflow.
✓	Editorial Office can convene a "discussion forum" (chat room) to discuss a particular submission with other Editors, and Reviewers, and permit shared access to relevant submission components; visual prompts indicate unread posts.
✓	Editorial Office can configure multiple discussion forum templates with default settings and text.
✓	Editorial Office can configure discussion forum templates that are triggered automatically.
✓	Editorial Office can transfer submissions and reviews between co-operating Editorial Manager and non-Editorial Manager publications.
✓	Editorial Office can share Co-Author questionnaire details in transfer workflows.
✓	Editorial Office can grant Author access to submission correspondence history from the Author home page.
✓	Editorial Office can require acknowledgement from contributing Authors (named by the corresponding Author), either by requiring that they click on an emailed "deep link", or by requiring that contributing Authors create/validate a user record in the system.
✓	Editor home page can include "quick links" to Editor's preferred list of actionable submissions. Quick links can be shared with other authorized users.
✓	Authorized Editorial Office staff can independently edit manuscript metadata and or submitted files.
✓	Editorial Office staff can configure metadata fields for association with specific article types.
✓	When searching for Reviewers, Editors have visibility to Reviewer activity on other co-operating journals.
✓	Editorial Office staff working on multiple journals can use one click to automatically log-in to other authorized journals.
✓	Editorial Office is alerted to time zone differences.

✓	System includes eCommerce and comprehensive Author charging functionality (see Commerce Manager).
✓	Editorial Office can configure the “Manuscript Services” icon to display to Authors during submission workflow.
✓	Editorial Office can work with third-party manuscript service providers (MSPs) via EM Ingest, allowing automation of the manual manuscript submission workflows MSPs already employ.
✓	Editorial Office can choose to deactivate an MSP they opt not to work with.
✓	Editorial Office can save editors time by directing ingested submissions to Author’s “Submissions sent back to Author” folder for completion of additional information before officially submitting to the journal.
✓	Editorial Office can facilitate revision decision and resubmission, and transfer offers, through third party Author services and tools and Publisher portals.
✓	Editorial Office can forward emails received outside of the system to a peer review “inbox” that will automatically file the email with the correct manuscript “history.”
✓	Editorial Office can be alerted to potential duplicate submissions based on Author(s) name(s), manuscript title and manuscript abstract, either within the journal or across publisher journals.
✓	Editorial Office can activate Open Funder Registry submission option so that Authors and Co-Authors can provide accurate funding information using the Open Funder Registry list of standardized research funders and sub-agencies.
✓	Editorial Office can leverage standardized institutional name identification using the Ringgold institutional database .
✓	Editorial Office can include Co-Author institutional affiliation on Details and Author Details pages.