Editorial Manager®

Editor Functionality Checklist

The checklist is current for Version 15.1.
If you have a requirement that you do not see on the list
or if you have questions, please send an email to marketing@ariessys.com.

The functionality and content available to Editors is configured and controlled by the Editorial Office using web-based administration tools.	✓	
Editor role names and functional capabilities can be configured by the Editorial Office.	✓	
Editors can view and manage contributor identifiers such as ORCID, ISNI, Researcher ID, PubMed Author ID and Scopus ID. Editors can "fetch" ORCIDs.	✓	
Editors can review CRediT contributor role information for Authors and Co-Authors.	✓	
Editors can quickly and easily access Co-Author institutional information from Details and Author Details pages.	✓	
Appropriately authorized Editors can delete spurious/test submissions prior to assignment and no charge is made for deleted submissions.	✓	
Early decisions ("desk reject") can be made without Editor assignment.	✓	
Peer-review tasks are sent to Editors by immediate assignment or by invitation.	✓	
Editors can select a group of candidate Section Editors based on keyword matching and can automatically invite them to handle the submission according to configured schedule and preference.	✓	
Editors are notified of assignments by email and by configurable menu folder options.	✓	
Editors can view their tasks ("action links") in a list or in a pop-up window.	✓	
Editors can quickly establish which folders and submissions require attention based on color-coded indicators.	✓	
Editors can have access to additional manuscript data fields customized by the Editorial Office.	✓	
Editors can have access to additional user data fields customized by the Editorial Office.	✓	
Manuscript PDFs generated by the system and viewed by Editors can include HTML display and linked in journal-configured text.	✓	
Editors can view secondary fields used to store international Author name and address variations. Selected secondary fields are searchable.	✓	
Different workflow parameters can be configured based on article type.	✓	
Editors see "search submissions – results" and "Saved Search Results" in the modern, streamlined, interactive PowerGrid. PowerGrid allows users to resize, re-order, lock and include/exclude data columns according to personal preference.	✓	
Editors can search for candidate Reviewers by creating custom searches that combine name, address, institution, classifications, manuscript keywords, or other criteria including available dates.	✓	
Editors can search and invite Reviewers from the Reviewer Discovery database that includes more than 3.5 million candidate Reviewers, including comprehensive biographical profile and publication history.	✓	
Editors can view manuscript data fields including secondary submission fields used (for example) to store translated versions of submission titles.	✓	
Editors can assign Reviewers and Authors (without an invitation step) to new and revised manuscripts.	✓	
Editors can quickly and conveniently invite Reviewers who have been suggested or opposed by the submitting Author. Appropriate warnings appear during Reviewer searching and selection.	✓	
Editors have convenient access to Reviewer decline reasons as part of workflow.	✓	
Editors can "propose" Reviewers for subsequent invitation by staff.	✓	
Reviewers suggested by Editors can be ranked by the order the Reviewer should be invited.	✓	
Editors can customize the Reviewer invitation letter(s) "on-the-fly."	✓	

Editors can optionally re-open submitted reviews so that Reviewers can correct or update previously submitted comments.	✓	
Editors can modify Reviewer due date. Editors can specify the number of reviews required for a particular manuscript (if permitted by the Editorial Office).	✓	
Editors can easily identify manuscripts where Reviewers have not yet responded to their invitation, as well as reviews in progress.	✓	
Editors can easily identify manuscripts which have all required reviews completed and which are ready for a decision.	✓	
Editors can select "alternate" Reviewers who will be automatically "promoted" and invited if primary Reviewers decline the Reviewer invitation (configurable option). Alternate Reviewers can be designated to replace specific Reviewers, or set to 'role-based' replacement.	✓	
Letters used to invite alternate Reviewers can be pre-configured and edited by authorized Editors.	✓	
Editors can increase the number of reviews required for submissions in progress.	✓	
Editors can search for Reviewers by linking to an External Reviewer Database (such as a third-party or in-house database).	✓	
Editors can easily sort lists of displayed manuscripts.	✓	
The number of manuscripts displayed per page is user-defined.	✓	
Editors can collapse and expand lists of manuscript records to facilitate viewing of long lists.	✓	
"Submit as an Editor" functionality allows Editors to quickly upload manuscripts intended for publication without peer review.	✓	
Editors can see customized "flags" that provide visual alerts associated with each manuscript (e.g. urgent manuscript, possible cover artwork, etc.).	✓	
Submission "flags" can be associated with specific metadata entries.	✓	
Editors can create and save searches for submissions with specific "flags."	✓	
Editors can be granted access to manuscript details (metadata) including notes added by the Editorial Office.	✓	
Editors can be granted access to Reviewer "people" information including notes added by the Editorial Office.	✓	
Editors can be granted access to manuscript searching capabilities (e.g. searching by manuscript number, Author name, keywords, notes etc.). Search results include "actions" so Editors can perform appropriate tasks following retrieval of desired manuscript(s).	✓	
Editors can access manuscript and people search functionality from any page.	✓	
Editors can search granular people notes, including Author and note entry date, thereby providing an audit trail.	✓	
Editors of journals in 'people sharing groups' can view detailed people notes cross-journal.	✓	
Editors can be granted access to reports and statistics.	✓	
Reports can be displayed in a graphical format such as graphs, charts and gauges.	✓	
Editors can easily modify and save standard reports.	✓	
Editors can use a web-based reporting tool that facilitates data selection, manipulation and presentation.	✓	
Reports can be emailed to Editors according to a configurable schedule (e.g. weekly).	✓	
Editors can be granted access to the correspondence history, including the text of any standard and customized letters.	✓	
Editors can conveniently add externally received emails to the manuscript correspondence record.	✓	
Editors can be granted the power to assign a manuscript to other Editor roles using multiple rich text email letters that can be edited "on-the-fly."	✓	
Editors can conveniently reassign revised manuscripts to all the Editors who handled the prior version of the manuscript.	✓	
Editors can make decisions concerning manuscripts at any time regardless of Reviewer status.	✓	
The list of Editor decision terms displayed is configured and controlled by the Editorial Office. Any number of decision terms can be configured and modified at any time using web-based administration tools.	✓	
Editors can select from multiple decision email letters for each decision term and revision.	✓	
Editors can maintain a consistent voice by quickly inserting publication-defined decision phrases into letters.	✓	
Editor decision letters can include attached files as a link **or** directly as an email attachment.	✓	

The Editor decision page provides single-screen access to all the information needed by the Editor to make a decision about the manuscript, including all manuscript revisions, all Reviewer comments, comments from other Editors, Author letters, and prior decision letters.	✓	
Editors are presented with PDFs that include revision number in file name to identify relevant revision.	✓	
Editors can save their comments for later submission.	✓	
Editors can display and print a complete layout of their comments prior to submission.	✓	
Editors can edit Reviewer comments that will be displayed to the Author (the original unedited version remains stored and available in the system).	✓	
Editors can enter confidential internal comments and comments for the Author.	✓	
Editor comments and decision terms can be merged into standard Author decision letters, and can be customized "on-the-fly."	✓	
All letters (including decision letters) can be CC'd or BCC'd to specific email addresses.	✓	
Draft decision letters can be shared between Editors.	✓	
Editors can rate Reviewer performance.	✓	
Editors can optionally allow "open peer review" where Author and Reviewer identities are visible.	✓	
Editors have the option to "terminate" or "uninvite" Reviewers who have not submitted their review prior to decision. Appropriate warnings are displayed if Reviewers have saved a partially completed review.	✓	
Editors can be given permission to send reminder letters to Reviewers (configured by the Editorial Office).	✓	
Editors can customize Reviewer reminder letters "on-the-fly."	✓	
Editors can set up automated reminders to send to Reviewers who have not responded or sent in their review.	✓	
Editors can send automated reminders to Reviewers who have only partially completed a review.	✓	
Email letters sent by Editors can include automatic calendar entries.	✓	
Editors can view completed Reviewer forms. Reviewer forms can contain unlimited questions including text, numeric, date, yes/ no, type responses. Reviewer forms are appropriate to submission article type and revision.	✓	
If an Editor has assigned a manuscript to another Editor(s), they can group those manuscripts by Editor name.	✓	
Editors can be "unassigned" from a submission so that the submission can be "rolled back" to an earlier Editor, or entirely switched to a new Editor along with in-process reviews.	✓	
Editors can view manuscripts with their prior decisions, grouped by decision (accept, reject, withdrawn, transferred).	✓	
Editors can access key performance data when selecting Reviewers, such as the average time to complete a review, number of times the Reviewer has declined assignments, number of outstanding assignments and unavailable dates.	✓	
Appropriately authorized Editors can "proxy" for Authors and Reviewers. System includes an audit trail of "proxied" transactions.	✓	
Appropriately authorized Editors can upload and download submission and "companion" files from the manuscript file inventory folder.	✓	
Emails sent by the system can be configured to come "from" a default publication email address or the Editor's personal email address.	✓	
Editor can add production notes to an accepted manuscript.	✓	
Manuscript metadata and Author source files can be automatically transmitted to a third-party production tracking system (or print vendor) in XML format.	✓	
A publication-customized transmittal form displays all relevant metadata to be transmitted to production system upon final acceptance of a manuscript.	✓	
The Editorial Office can configure additional transmittal form fields.	✓	
Editors are alerted to potential duplicate submissions based on Author name(s), title matches and abstract matches. Duplicate submissions can be checked within a single journal or across multiple journals.	✓	
Editors can be prevented from seeing Reviewer comments that pertain to manuscripts that they (the Editor) have Authored.	✓	
Editors can easily register and invite unregistered users to review a particular manuscript.	✓	
Upon resubmission, a revised manuscript can be (optionally) automatically assigned to the Editor who handled it previously.	✓	
Appropriately authorized Editors can run Author reminder reports to identify Authors who are late in submitting manuscript revisions. Reminder letters can be sent and customized "on-the-fly".	✓	

Editors can allow "late" reviews to be added to the manuscript record.	✓	
Editors can release an accepted manuscript to an online journal site for pre-print publication (WebFirst).	✓	
Editors can initiate manuscript proposals and invite one or more Authors to respond to the invitation.	✓	
Authors can be easily invited to submit a manuscript using configurable invitation letters that can be edited "on-the-fly". Author invitation letters can include deep links so that Authors can respond to the invitation without needing to log into the system.	✓	
Editors can send automated reminders to invited Authors before and after due dates.	✓	
Editors can use automated reminder emails to notify Authors of abandoned submissions requiring action.	✓	
Editors can invite Authors to submit commentaries based on existing submissions.	✓	
Editors can select "alternate Authors" who will be automatically invited to make a submission if earlier invited Authors decline invitation.	✓	
Editors can track proposals and commentaries through submission and peer review workflow. Relevant submissions are "linked". Linked submissions can share prior Reviewers.	✓	
Editors can view test results for Author artwork checking against publication-defined requirements.	✓	
Editors can view a manuscript rating card that aggregates the Reviewers' responses to radio button questions on the Reviewer form.	✓	
Editors can select specific Reviewer question responses to include in decision letters.	✓	
Editors can download and edit Reviewer attachments, and optionally display Reviewer attachments to Authors upon revision.	✓	
Editors can upload, download and edit submission attachments. Attachments can be optionally displayed to other workflow participants. "Deep links" provide a convenient way to access attachments directly from within email.	✓	
Editors can attach external or manuscript files to ad hoc email letters.	✓	
Editors can register their opinions using radio buttons on a customized Editor form.	✓	
Editors can send formatted letters with images and logos using Rich Text.	✓	
Editors can edit and resend email letters.	✓	
Editors 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 manuscript title, keywords or Author names as the search criteria.	✓	
Editors can automatically deposit accepted manuscript into the PubMed NIHMS system (PMPT).	✓	
Editors have access to ad hoc emails sent to Editorial staff that are automatically recorded in the system. Editorial Offices can configure an unlimited number of Editor ad hoc emails that include merge fields to automatically import useful data such as manuscript number and title.	✓	
Editors can easily address ad hoc emails with autofill of regularly used email addresses.	✓	
Editors can see Author bibliographies that have been automatically linked to PubMed and Crossref, and formatted to the publication's preferred bibliographic style.	✓	
The system automatically detects and corrects some errors in Author submitted bibliographies. (For example: insufficient Authors listed before "et al" or missing volume numbers).	✓	
Users can switch between Reviewer, Editor and Author roles without having to log out of the system.	✓	
Editor role can be selected as the default log-in role for Editor convenience.	✓	
For convenience, Editors can use their ORCID username and password as a single-sign-on (SSO) option to multiple journals.	✓	
Editors can send a thank you letter to Reviewers 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.	✓	
Editors can trigger an automatic Author name search to view a list of the Author's prior publications.	✓	
At key points in the workflow, Editors can select (and edit) from a list of appropriate publication-defined template email letters. For example, this means that Reviewers can be sent different invitation letters based on article type or revision number.	✓	
Editors can receive periodic (e.g. daily, weekly) automated reminders of their "to do" list with convenient color-coded signposting indicators and "deep links" to undertake actions.	✓	
Customized merge fields allow Editors to automatically populate email letters with preferred text and graphics.	✓	
Editors can perform assigned tasks simply by clicking secure deep links sent to them by email, without having to log into the system.	✓	

Editors can choose to "save and submit later" in-process decisions and letters.	✓	
Email letters can be re-sent from the manuscript's correspondence history.	✓	
Email content can be in unicode format.	✓	
Editors can view status history and correspondence history of submissions.	✓	
Editors can uninvite or terminate Reviewers and subordinate Editors.	✓	
Editors can be granted access to an assignment status report that clearly shows the peer review status for each manuscript that is active in the Editorial workflow. From the report, Editors can take appropriate actions such as inviting additional Reviewers or sending email reminders.	✓	
Editors can be granted access to a Reviewer performance report that shows detailed performance for each Reviewer in the system. This data can be extracted for further manipulation in a desktop application such as Microsoft Excel.	✓	
Editors can quickly surface review status as an expandable column that includes detailed information and color coding.	✓	
Editors can submit Author manuscripts to Similarity Check for plagiarism checking. (Additional charges apply).	✓	
Editors can conveniently view results of plagiarism (Similarity Check) checking without needing to wait for file upload.	✓	
Editors can review the results of checkCIF for materials science and crystallography content.	✓	
Editors can review the results of predictive bibliometrics reports.	✓	
Editors can be granted limited access to system configuration options.	✓	
Editors can view Author responses to publication-defined submission questions configured by article type and revision.	✓	
Editors can view and search by submission flags associated with author responses to submission questions.	✓	
Submissions can be "linked" 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.	✓	
Letter-to-the-Editor functionality facilitates processing of multiple submitted letters and trafficking of comments to Authors, Reviewers and production.	✓	
A system-generated unique DOI (Digital Object Identifier) can be assigned to the submission during workflow.	✓	
Editors can convene a "discussion forum" (chat room) to discuss a particular submission with Reviewers and other Editors and permit shared access to relevant submission components; visual prompts indicate unread posts.	✓	
Editors can transfer or offer transfer of submissions between co-operating publications. Authors can confirm transfer option thereby initiating automatic transfer of files and data to recipient journal.	✓	
Editors can grant Author access to submission correspondence history from the Author home page.	✓	
Authors can process publication fees (submission fees, page charges, color charges, open access fees, etc.) during manuscript workflow. Authors can pay by credit card, "bill me" or waiver request, as determined by publisher.	✓	
Journal office can collect fees from Authors, including submission fees, color charges, open access fees, page charges, etc. Fees can be collected by credit card, bill me or waiver request option.	✓	
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 Editors can independently edit manuscript metadata and/or submitted files.	✓	
When inviting Authors to submit manuscripts or book chapters, Editors can easily view past invitation statistics and can add invitee specific notes.	✓	
Editors can assign Authors for invited manuscripts and book chapters.	✓	
Editors working on multiple journals can use one click to automatically log-in to other authorized journals.	✓	
When searching for Reviewers, Editors have visibility into Reviewer activity on other co-operating journals.	✓	
Automatic linking to database of 2,500,000 Author biographical profiles.	✓	
Editors are alerted to time zone differences.	✓	
Editors can CC emails received outside of the system to a peer review "inbox" that will automatically file the email with the correct manuscript "history."	✓	
Editors can recommend transfer of a manuscript to a third-party journal and permit the Author to Authorize the transfer during configurable "transfer window."	✓	
Editors can utilize MECA-compliant import/export transmittal, enabling standard transfer across major submission systems.	✓	

Editors can view Reviewer Authorization to transfer their review and identity with transferred manuscript.	✓	
Editors can view Ingested/transferred submissions directly in the editorial menu (no need to send files back to Author).	✓	
Editors can direct Authors and Co-Authors to a publication-customized web form to complete multi-part questions. This can be used to obtain compliance with ICMJE and similar forms for each individual Author.	✓	
Editors can manage the Author/Co-Author form process to check for completeness and compliance, including automatic reminders.	✓	
Editors can configure and associate hundreds of graphical "flags" to display next to people names.	✓	
Editors can see when a particular flag was turned on or off within history.	✓	
Editors have access to Open Funder Registry funder information for the manuscript.	✓	
Editors have access to normalized Author institution names (Ringgold data).	✓	
Editorial Offices are warned if contributor lists have been changed between revisions.	✓	
Editorial Offices are able to comply with General Data Protection Regulation (GDPR) standards using forced privacy policy registration questions, mandatory notification of proxy and opt-out links. Editorial Offices can anonymize user data upon request.	✓	
Editors can access third-party statistical analysis of a manuscript using StatReviewer.	✓	
If Authors are using an Author Portal or Manuscript Service provider for submission, Editors can send communications to Authors for display directly in the provider interface.	✓	
Editors can view an Identity Confidence Check rating for users to help determine reliability and reduce academic fraud. Confidence factors are selected and configured based on journal office preferences.	✓	
Editors can assign and perform editorial tasks without initiating production in parallel to peer review.	✓	
Editors can utilize third-party, "Early Proof" editing systems with two-way communication and sync between a third-party system and EM.	✓	