Editorial Manager®

Author Functionality Checklist

The checklist is current for Version 7.3.
If you have a requirement that you do not see on the list,
or if you have questions, please send an email to *marketing@edmgr.com*

HTTP or secure HTTPS-based system with encrypted passwords.	✓	
Online author help screens.	✓	
Authors can register themselves on the system or can be pre-registered by the editorial office.	✓	
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 can submit a new manuscript.	✓	
Authors see different (customizable) submission instructions 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.	✓	
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.	✓	
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.	✓	
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 affiliation and contact email address.	✓	
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, TFF, PowerPoint, Excel, 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.	✓	
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 re-enter 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.	✓	
If an author is interrupted, the system automatically saves the partially completed submission for later completion.	✓	
All author submission items are virus checked.	✓	
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 after downloading from web site.	✓	
Author can edit the manuscript prior to submission to editorial office.	✓	
The PDF manuscript generated from the author's submission file preserves HTML links.	✓	
Authors are required to check PDF before final submission to editorial office.	✓	
Authors receive a (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 using the Web.	✓	
Authors may be invited to submit papers or commentaries on previously submitted papers.	✓	
Authors can easily identify their "invited" manuscripts.	✓	
Authors can respond to "invited" manuscripts by clicking on deep links in invitation emails without having to log into the system.	✓	
Submission can be "bounced" back to Author for re-submission following inspection and/or editing by the editorial office.	✓	
Author can respond to reviewers, and responses are recorded in the system.	✓	
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 (publication-configured) editor decision letter by 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.	✓	
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 import data such as the manuscript number and title.	✓	
Authors can automatically upload a group of submission files from the arXiv preprint server.	✓	
Author manuscripts can be processed using CrossCheck 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 can be transferred between co-operating publications.	✓	
Authors have access to manuscript correspondence history from their home page (subject to Editor configuration).	✓	
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.	✓	
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.	✓	

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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.	✓	
Appropriately authorized editors can delete spurious/test submissions prior to assignment and no charge is made for deleted submission.	✓	
Peer-review tasks are sent to editors by immediate assignment or by invitation.	✓	
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 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.	✓	
Different workflow parameters can be configured based on article type.	✓	
Editors can search for candidate reviewers by creating searches that combine name, address, institution, keywords, or other criteria.	✓	
Editors can search for candidate reviewers by matching reviewer and manuscript keywords.	✓	
Editors can search for candidate reviewers using an algorithm that automatically matches multiple criteria (e.g. keyword, availability, past performance, board membership, etc.).	✓	
Editors can see reviewer names that have been suggested or opposed by the submitting author. Appropriate warnings appear during reviewer searching and selection.	✓	
Editors can “propose” reviewers for subsequent invitation by publication office staff.	✓	
Editors can customize the reviewer invitation letter(s) “on-the-fly”.	✓	
Editors can modify reviewer due date (if permitted by the editorial office). 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.	✓	
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 invited if primary reviewers decline the reviewer invitation (configurable option). Alternate reviewers can be designated to replace specific reviewers.	✓	
Letters used to invite alternate reviewers can be pre-configured and edited by authorized editors.	✓	
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.	✓	
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, etc.). Search results include “actions” so editors can perform appropriate tasks following retrieval of desired manuscript(s).	✓	
Editors can be granted access to reports and statistics. They can configure and save their own reports.	✓	
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 role(s) using multiple email letters that can be edited “on-the-fly”.	✓	
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.	✓	
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 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”.	✓	
Editors can rate reviewer performance.	✓	
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 complete review.	✓	
Editors can be given permission to send reminder letters to reviewers (configured by the editorial office).	✓	
Reviewer reminder letters can be customized “on-the-fly”.	✓	
Editors can set up Automated Reminders to send to Reviewers who have not responded or sent in their review.	✓	
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).	✓	
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. Emails include CC functionality.	✓	
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 from an author.	✓	
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 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 are editable “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 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”.	✓	
Editors can view test results for author artwork checking against publication-defined publication requirements.	✓	
Editors can view a manuscript rating card that aggregates the reviewers’ responses to radio button questions on the reviewer form.	✓	
Editors can download and edit reviewer attachments, and optionally display reviewer attachments to authors upon revision.	✓	
Editors can register their opinions using radio buttons on a customized editor form.	✓	
Editors can send formatted letters with images and logos using HTML.	✓	
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 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 see author bibliographies that have been automatically linked to PubMed and Crossref, and formatted to the publication’s preferred bibliographic style.	✓	
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.	✓	
Editors can send a thank you letter 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 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 un 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 submit author manuscripts to CrossCheck for plagiarism checking. (Additional charges apply).	✓	
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.	✓	
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 other Editors and permit shared access to relevant submission components.	✓	
Editors can transfer submissions between co-operating publications.	✓	
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 Editors can easily view past invitation statistics and can add invitee specific notes.	✓	
Editors working on multiple journals can use one click to automatically log-in to other authorized journals.	✓	
When searching for reviewers, Editors have visibility to reviewer activity on other co-operating journals.	✓	

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Reviewer Functionality Checklist

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or if you have questions, please send an email to *marketing@edmgr.com*

Users can register themselves on the system and indicate their willingness to be reviewers, or can be registered by an editor.	✓	
Reviewers can be categorized by publication-defined multi level keywords (areas of expertise).	✓	
Reviewers can enter their own keywords to define their area of expertise.	✓	
Editorial office can invite reviewers to review a manuscript by email (See Editor Checklist for more details).	✓	
The amount of information displayed to the reviewer (e.g. abstract) before accepting the invitation is controlled by the editorial office.	✓	
Reviewers can accept or decline a reviewer invitation.	✓	
The system can be set up as “single-blind” or “double-blind”.	✓	
Reviewers can submit their review online.	✓	
Reviewers can save their review for later submission.	✓	
Reviewers can select from a publication-defined list of recommendation terms.	✓	
Reviewers can rate the manuscript.	✓	
Reviewers can be presented with a publication-defined reviewer form.	✓	
Reviewers can proof and print their entire review before submission to the editorial office.	✓	
Reviewers can view their previously completed assignments.	✓	
Reviewer does not have to download multiple PDFs for each item comprising a submission. Instead, the reviewer has the convenience of downloading a single PDF.	✓	
Reviewer PDF has download links to high-resolution versions of images displayed in the PDF.	✓	
Reviewers can be prevented by the editorial office from seeing some parts of the author submission PDF.	✓	
Hyperlinks from original author files remain as links in the reviewer PDF.	✓	
Reviewer PDF can include download links for supplementary materials such as video and audio files.	✓	
PDF version of author’s manuscript can include overlaid line numbers to facilitate reviewer comments.	✓	
When reviewing a revised manuscript, reviewers can be given access to other reviewers’ comments (if the editorial office considers this appropriate).	✓	
When reviewing a revised manuscript, reviewers can be given access to the editor’s decision letter (if the editorial office considers this appropriate).	✓	
When reviewing a revised manuscript, reviewers have access to prior revisions of the author’s manuscript.	✓	
Reviewers can be prompted to suggest alternate candidate reviewers if they decline an assignment.	✓	
Editorial offices can define multiple reviewer roles. (e.g. Regular reviewers and Biostatistical reviewers) with different workflow parameters.	✓	

Editors can be granted access to detailed reviewer statistics when selecting reviewers.	✓	
Editors can send a request to the editorial office to assign an unregistered reviewer or can directly register and invite a new reviewer.	✓	
Due dates and deadlines are visible to reviewers on-screen and in email communications.	✓	
Reviewer reminder letters can be sent to reviewers before a review is due and/or when a review is late. All reviewer letters can be customized “on-the-fly” by the editorial office.	✓	
A reviewer’s performance statistics are displayed to the reviewer for each submission he or she reviewed, allowing the reviewer to see how they performed over time.	✓	
Reviewers can view the author’s response to their review, which is recorded by the system.	✓	
Reviewers can indicate dates when they are not available.	✓	
Reviewers can complete a publication-defined reviewer form (based on article type and role) with radio button questions.	✓	
Reviewers can see instructions based on article type and reviewer role.	✓	
Reviewers can upload attachments with their recommendations.	✓	
Reviewer’s uploaded Word and PDF file properties are automatically sanitized to ensure Reviewer anonymity.	✓	
Reviewers can respond to reviewer assignments *without needing to explicitly log into the system*, by clicking on secure links embedded in emails sent to them by the publication.	✓	
Reviewers who login through deep links can be exempted from normal registration questions, in order to expedite their login.	✓	
Reviewers see registration and login instructions that have been customized by the editorial office.	✓	
Reviewers 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.	✓	
Reviewers 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 reviewer *ad hoc* emails that include merge fields to automatically import useful data such manuscript number and title.	✓	
Reviewers can see author bibliographies that have been automatically linked to Pubmed and Crossref, and formatted to the publication’s preferred style.	✓	
Users can switch between Reviewer, Editor and Author roles without having to log out of the system.	✓	
Reviewer role can be selected as the default login role.	✓	
Reviewer can receive editor decision letter separate from the decision letter sent to author, and author identifying information can be removed for “double-blind” workflows.	✓	
Reviewers can be configured to receive a thank you letter following the editor 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.	✓	

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Editorial office can display system login box on any Web page, such as the journal online site.	✓	
Editorial office uses Web-based administration tools to control user roles and permissions.	✓	
Editorial office uses Web-based tools to set up template letters with appropriate merge fields.	✓	
Appropriate letters can also be edited “on-the-fly”.	✓	
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.	✓	
Editors can create and save searches for submissions with specific “flags”.	✓	
Editorial office receives 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.	✓	
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 or opposed reviewers.	✓	
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 configure author submission 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.	✓	
New manuscripts can be sent to editors by assignment or invitation.	✓	
Editorial office can select from a variety of manuscript number options (automatic or manual).	✓	
Manuscript numbers reflect revision status (e.g. R1, R2, etc.).	✓	
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 un Unicode format.	✓	

Editorial office can configure the terms used to describe the manuscript status.	✓	
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 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 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 specify their own reviewer forms and instructional text for reviewers, based on article type and reviewer role.	✓	
Editorial office can configure the system with their own reviewer and editor decision terms.	✓	
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.	✓	
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.	✓	
Editorial office can check on the status of manuscripts assigned to editors.	✓	
Editorial office can produce and send customized reviewer reminder email letters. Email letters can be customized “on-the-fly”.	✓	
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 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 has a tool for creating and saving custom reports.	✓	
Editorial office can run custom reports across multiple publications.	✓	
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 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” information, including the ability to add people-specific notes to people records, and URLs pointing to external resources.	✓	
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.	✓	
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.	✓	
Editorial office can attach manuscript-specific notes to submission records.	✓	
Editorial office can generate reports detailing outstanding editor assignments and send email reminders.	✓	
Editorial office can generate reports detailing outstanding author revisions and send email reminders to authors reminding them to submit revisions.	✓	
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 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 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.	✓	
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 HTML 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 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.	✓	
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 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 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 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 CrossCheck for plagiarism checking. (Additional charges apply).	✓	
Editorial office can grant editors limited access to system configuration options (e.g. just the ability to edit form email letters).	✓	
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.	✓	
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 permit shared access to relevant submission components.	✓	
Editorial office can transfer submissions between co-operating publications.	✓	
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.	✓	