

Welcome to EEMUG 2016



em Editorial Manager®
www.ariessys.com

Aries
systems
Publish Faster. Publish Smarter.

The Joy of Letters

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[Agenda]

- Configuring Letters
 - Letter Options
 - Letter Content Options
 - HTML in Letters
- Attach Files to Letters
 - Decision Letters
- Edit and Resend E-mail
- Managing External Correspondence

Creating and Configuring Letters



Letters =Communication

[System Administration > Policy Manager > Email & Letter Policies > Edit Letters]

- Sort by Letter Purpose or Letter Family

Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title. [\(more...\)](#)

[Back to PolicyManager](#)

Add New Letter

Save Changes

Edit Image Files for HTML Letters

Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format	HTML Format	All Formats
Journal Office Notice Editor Decision Notification	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Editor Agrees to Handle Assignment	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Editor Decision Rescinded	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Declined Revision Reinstated	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice All Reviews Complete	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Author Declines to Revise	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Completed Review	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice of Proxy Registration	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice of Review Assignment	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Revised Submission	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

[Letters]: Letter Family

- Each Letter Family has different configuration options
 - Recipients – Individual Reviewer, All Reviewers, Corresponding Editor, Author, etc.
 - CC or BCC Recipients, Text box to enter email, Co-Authors
 - Sender – Publication email, Corresponding Editor
 - Attachments - Available for all letter families except Batch emails

[Letters]: Letter Family

- 23 Letter Families
 - Used to organize letters
- Examples of Families
 - Editor Reminders
 - Reviewer Invitations
 - Ad Hoc Letters
 - Decision

[Letters]:

Remove / Hide Letters

- Remove or Hide templates:
 - Hidden templates are placed at bottom of list

Scheduled EAR Report	Enterprise Analytics Reporting	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
Author - Other Author Verification	Co-Author Communications	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide

Hidden Letters						
Letter Purpose ▲▼	Letter Family Group by: ▲▼		Text Format	HTML Format		All Formats
Terminate Assignment	Terminate Assignments	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Restore
Proposal Ad Hoc	Ad Hoc For Proposal	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Restore

Add New Letter

Save Changes

Edit Image Files for HTML Letters

[Back to PolicyManager](#)



Shared Letter Templates



New in 12.1

[Letters]: Shared Letter Templates

Admin manager > Configure shared letters management

ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP

Role: Managing Editor Username: mary121

Configure Shared Letters Management

Confirming the letter sharing relationship and establishing a shared letters group is the responsibility of the publications involved.

The Shared Letters feature enables one site (known as a "master site"), to designate specific letter templates as "shared" and then push those shared letter templates to selected sites, known as "subscriber sites".

To configure this site as a master site for the Shared Letters feature, select the checkbox 'Enable Shared Letters and designate this site as a master site', then click the Submit button. The confirmation page will contain a "Manage Subscriber Sites" link, allowing you to add subscriber sites.

*To designate letter templates as "shared" and push them to subscriber sites:
First configure this site as a master site on this page and add subscriber sites using the "Manage Subscriber Sites" link. Then go to PolicyManager, Edit Letters for letter configuration.*

Enable Shared Letters and designate this site as a master site.

Manage Subscriber Sites

No subscriber sites have yet been added. To add a subscriber site, enter that site's publication code into the box (or a list of publication codes separated by semi-colons), and click the button 'Add New Subscriber Sites'.

Close

Additional Subscriber Sites (Enter Publication Codes):

Add New Subscriber Sites

Enter one publication code or a list of publication codes separated by semi-colons.

Close

[Letters]: Shared Letter Templates

Admin manager > Configure shared letters management

Publication Code	Publication Title	Terminate Subscriber Relationship
DEMO112B	Journal of Demonstration1	Select All/ Clear All <input type="checkbox"/>
DEMO112A	Journal of Research and Development	<input type="checkbox"/>
DEMOCLONE1	Journal of Interesting Studies	<input type="checkbox"/>
DEMOCLONE2	Journal of New Information	<input type="checkbox"/>
DEMOCLONE3	Survey of Medical Research	<input type="checkbox"/>

Terminate Selected Sites

Additional Subscriber site (enter Publication Code):

Add new subscriber site

[Letters]:

Shared Letter Templates

System Admin > Policy Manager > Edit Letters

Share Letter	Letter Purpose	Letter Family Group by:	ActionManager Roles and Events	Letter Format		
				Text	Rich Text (HTML)	All Formats
<input type="checkbox"/>	Proposal Ad Hoc	Ad Hoc For Proposal		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Requests Deadline Extension on Revision	Ad Hoc From Author		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Requests Deadline Extension on Submission	Ad Hoc From Author		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input checked="" type="checkbox"/>	Ad Hoc	Ad Hoc From Editor		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove Hide
<input checked="" type="checkbox"/>	Author Notice - MS Outside of Publication Scope	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input checked="" type="checkbox"/>	Editor Query to Journal Office	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
	Editor Query					
** Claire's Sharing Test **			invite/Assign/Unassign Editor	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Restore
Reviewer Invitation			Reviewer Invitation	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Restore
Reviewer Invitation 2			Reviewer Invitation	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Restore

Add New Letter

Save Changes and Update Subscriber Sites

Edit Image Files for Letters

[Shared Letter Templates]: Subscriber Site

System Admin > Policy Manager > Edit Letters

Hidden Letters					
Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		
			Text	Rich Text (HTML)	All Formats
** Claire's Sharing Test ** S	Invite/Assign/Unassign Editor		<input type="radio"/> Edit	<input type="radio"/> Edit	Remove Restore
** Claire's Sharing Test ** S	Invite/Assign/Unassign Editor		<input type="radio"/> Edit	<input type="radio"/> Edit	Remove Restore
Ad Hoc S					Remove Restore
Author - Other Author Verific					Remove Restore
Author Notice - MS Outside S					Remove Restore
Editor Query to Journal Offic					Remove Restore

Edit Letters

This site is a subscriber site for the Shared Letters feature. Its master site is DEMOMB122.

The master site may have already subscribed this site to shared letter templates. If so, these are designated with a S symbol. [\(more...\)](#)

[Back to PolicyManager](#)

Add New Letter
Save Changes
Edit Image Files for Letters
Replace Selected Letters with Shared Letters

Replace with Shared Letter	Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		
				Text	Rich Text (HTML)	All Formats
<input type="checkbox"/>	** Claire's Sharing Test	Invite/Assign/Unassign Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Ad Hoc S	Ad Hoc From Editor		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author - Other Author Verification	General	Author - Notify Other Authors	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author - Other Author Verification Reminder	Author Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

Action Manager Events Column in Edit letters



New in 12.1

[Action Manager Events Column]:

System Admin > Policy Manager > Edit Letters

Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title. [\(more...\)](#)

[Back to PolicyManager](#)

Add New Letter

Save Changes

Edit Image Files for Letters

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		
			Text	Rich Text (HTML)	All Formats
Author - Other Author Verification	General	Author - Notify Other Authors	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Author - Other Author Verification Reminder	Author Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Author Approve Changes	General				
Author					

ActionManager	
Registration	
Event	
New User Registers	Journal Office Notice New User ▾
Forgot Username or Password	NONE ▾
Forced Username Change	NONE ▾
Merged Duplicate Users	NONE ▾
User is Made Inactive	NONE ▾
Proxy Register New User	Journal Office Notice of Proxy Registrar ▾

Options when creating Letters



Letters =Communication

[Creating Letters]:

System Admin> Policy Manager> Edit Letters

Letter Purpose:

Subject:

Letter Family:

Editor Roles That Can Send This Letter

None Selected	Select All
ALL EDITOR ROLES	
Managing Editor	Clear All
Editor	
Editorial Assistant	

Sender's E-mail Address

Use E-mail address of user triggering the Correspondence

The Journal <trash1@ariessc.com>

The Journal <trash1@ariessc.com>

[Creating Letters]:

System Admin> Policy Manager> Edit Letters

Recipient:

The Journal trash1@ariessc.com

User Selects Recipient using  icon

Corresponding Editor

Corresponding Production Editor

Display text box so sender can insert an e-mail address

Display the following e-mail address for the recipient:

(Multiple addresses may be entered, separated by a semicolon)

First Assigned Editor

Handling Editor

Editor who made the first Editor assignment

All Reviewers of the current revision of the submission

Display all Reviewers of the current revision so sender can select recipient(s)

Corresponding Author

[New in v.12.2]: Send Email Icon on Details Page

Editors	
Name:	✉ mary mary ▾ [Proxy]
Role:	Managing Editor
Date Assigned:	30 Nov 2015
Date Completed:	
Elapsed Days:	39
Recommendation:	

Reviewers	
Name:	✉ Michaela Barton (Reviewer) ▾ [Proxy]
Review Status:	Review Complete
Date Reviewer Invited:	01 Dec 2015
Date Reviewer Agreed:	01 Dec 2015
Date Review Due:	08 Dec 2015
Date Review Completed:	01 Dec 2015
Elapsed Days:	0
Recommendation:	Major Revision

Name:	✉ Agnetta AuthorDrei (Reviewer) ▾ [Proxy]
Review Status:	Review Complete
Date Reviewer Invited:	01 Dec 2015
Date Reviewer Agreed:	01 Dec 2015
Date Review Due:	08 Dec 2015
Date Review Completed:	01 Dec 2015

[Creating letters]:

System Admin> Policy Manager> Edit Letters

Automatically cc: bcc:

- All Co-Authors
- Corresponding Editor
- Corresponding Production Editor

Send copies to the following addresses:

(Multiple addresses may be entered, separated by a semicolon)

- cc:
- bcc:

Allow choice on 'Send Letter' page

The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:

- Display checkbox for co-Authors
- Display checkbox for Reviewers assigned to current Revision
- Display checkbox for Editors assigned to current Revision

Display e-mail entry box on 'Send Letter' page:

- cc:(Allow sender to manually enter cc: recipients)
- bcc:(Allow sender to manually enter bcc: recipients)

Attaching Files



Letters and automatic attachments for decision letters

[Creating letters]:

System Admin> Policy Manager> Edit Letters

Allow choice on 'Send Letter' page The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:

- Display checkbox for co-Authors
- Display checkbox for Reviewers assigned to current Revision
- Display checkbox for Editors assigned to current Revision

Display e-mail entry box on 'Send Letter' page:

- cc:(Allow sender to manually enter cc: recipients)
- bcc:(Allow sender to manually enter bcc: recipients)

Allow attachments

Allow sender to add Rich Text (HTML) formatting

Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

[Attaching Files]: Customise Letter

Customize Letter - General Email to Author

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Cancel

Preview and Send

From: "Steven Gain" <sgain@ariessys.com>

To: Corresponding Author;

Letter Subject: Email to Author

Attachments: [Add/Change Attachments](#)

Letter Body: [Insert Special Character](#) | [Insert Custom Merge Field](#) [Open in New Window](#)

Attachment

Cancel

Preview and Send

[Attaching Files]: Customise Letter > Add/ Change Attachments

Cancel

Proceed

Select Files

To add a file from your computer, use the Choose Files button to browse your computer, or drag and drop the files onto the folder image below.

Caution: Please be aware that many e-mail services limit the number or size of attachments that can be received and may not deliver the message if attachments exceed the limit.

Browse your computer:

Choose Files

Or drag and drop files here:



Add Files from Submission Inventory

Select the checkbox next to the file(s) you would like to attach.

[Submission Files](#)

System PDFs

A System PDF is the copy of the submission when the "View Submission" link is clicked. Depending on configuration, the Reviewer version and Editor/Author version may not contain the same items.

Select	Submission Revision	PDF Version	Size	Last Modified
<input checked="" type="checkbox"/>	Original	Editor/Author Version	2.5 MB	03/03/2015
<input type="checkbox"/>	Original	Reviewer Version	2.5 MB	03/03/2015

Submission Files

[Top](#)

Select	File Name	Description	Item	Size	Last Modified
<input type="checkbox"/>	COPE_BAMS_DistributionCopy5.docx		Manuscript	15.9 MB	03/03/2015
<input type="checkbox"/>	COPE_BAMS_Supplement_v2.docx		Manuscript	135.3 KB	03/03/2015
<input type="checkbox"/>	BAMS-D-14-00157_CoverLetter.docx		Manuscript	70 KB	03/03/2015
<input checked="" type="checkbox"/>	EPC_BAMS-D-14-00157.pdf		Manuscript	538.9 KB	03/03/2015

Cancel

Proceed

[Attaching Files]: Customise Letter

Customize Letter - General Email to Author

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Cancel

Preview and Send

From: "Steven Gain" <sgain@ariessys.com>

To: Corresponding Author;

Letter Subject: Email to Author

Attachments: [DEMOSGG112-S-15-00021-Original_Submission-Editor-Author_Version.pdf](#)
[IEPC_BAMS-D-14-00157.pdf](#)

[Add/Change Attachments](#)

Letter Body:

[Insert Special Character](#) | [Insert Custom Merge Field](#)

[Open in New Window](#)

Attachment

[Decision letters]: Automatic Attachments

System Admin > Policy Manager > Production Manager >
Configure Attachment Security

PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

- ⊕ Registration and Login Policies
- ⊕ Status Policies
- ⊕ Submission Policies
- ⊕ Questionnaire Policies
- ⊕ Additional Data Policies
- ⊕ Editor Assignment Policies
- ⊕ Reviewer and Editor Form Policies
- ⊕ E-mail and Letter Policies
- ⊕ General Policies
- ⊕ Discussion Forums
- ⊕ Linked Submissions Policies
- ⊕ Conference Submission Policies
- ⊕ Transmittal Policies
- ⊖ **ProduXion Manager**
 - ⊕ [Configure Attachment Security](#)
 - ⊕ [Edit Instructions for Attachments](#)
 - ⊕ [Set Attachments Deep Link Policy](#)

[Decision letters]: Automatic Attachments

System Admin > Policy Manager > ProducXion Manager >
Configure Attachment Security

Author Access

When the final decision is made and the Notification letter is sent to the Author, files the Editors and Reviewers have uploaded that are marked as available to the Author may be included. To append these files to the Notification letter as e-mail attachments, select the option below. Deep links to access the files via the EM interface may also be used in the body of the letter. Both options may be used together, if desired.

Include available Editor/Reviewer Attachments with the Author Notification letter as e-mail attachments

Cancel

Submit

[Automatic Attachments]:

Attachment Availability

System Admin > Policy Manager > ProducXion Manager >
Configure Attachment Security

Availability

Select the applicable option(s) below to designate all uploaded Editor/Reviewer Attachments as available to the Author and/or Reviewers by default. The availability of individual files can also be set manually at various access points throughout the system.

A Reviewer always has access to files he or she uploaded, but if a file is marked as "Available to Reviewers" it will also be available to other Reviewers of the same submission.

	Author	Reviewers
Designate Editor -uploaded files as available by default to:	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Designate Reviewer -uploaded files as available by default to:	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Automatic Attachments]: Attachment Sanitization

System Admin > Policy Manager > Production Manager >
Configure Attachment Security

Cancel

Submit

Sanitization

Files uploaded by Editors and Reviewers as part of their work on the submission ("Attachments") may be made available to the Author and other Reviewers. Check the box below and click the "Submit" button to "sanitize" these files by removing identifying information from the 'File Properties' and 'Track Changes' features of Microsoft Office files, and the 'Properties' of PDF files. PDF annotations (with the exception of dynamic stamps) are also sanitized. Note: any personal identifying information included in the actual text of the file must be removed manually.

If sanitization is enabled, Authors will only have access to the sanitized version of the Attachments. Editors will have access to both the original and sanitized files. Reviewers will have access to the original files unless the checkbox 'Allow other Reviewers access only to Attachments with personal information removed' is selected.

Important Notes: Any Attachments which are not in Microsoft Office or PDF format will not have identifying information removed. Microsoft Office files include Word, Excel, and PowerPoint.

If the checkboxes are unchecked, Authors and/or Reviewers will only have access to the original (unsanitized) files, even if sanitized files have been created.

- Remove Personal Information from Editor/Reviewer Attachments in Microsoft Office or PDF format.
- Allow other Reviewers access only to Attachments with personal information removed.

Merge Fields



Using automatic fields to output information in letters

[Letter Content]: Merge Fields %System_Custom_Deep%

- System Merge Fields and Custom Merge Fields
 - Pull in information about the submission and/or Authors
 - Create your own custom merge fields
- Deep Linking Merge Fields
 - Merge as a link in letters
 - Brings recipient to locations in system
 - Allows recipients to accept or decline invitations directly from email

[Merge Fields]: Creating Custom Merge Fields

Policy Manager > Email and letter policies > Create custom merge fields

Define Custom Merge Fields

These custom merge fields enable your publication to define standardized text that can be added to letters sent from your publication, such as signatures, marketing messages, announcements, and legal disclaimers. [\(more...\)](#)

Add New Field

Sort In Alphabetical Order

Edit Image Files for HTML Letters

Custom Merge Fields	Actions
%CUSTOM_EMUG%	View Content Edit Definition Edit Letter Templates Copy Remove

Sort In Alphabetical Order

Edit Image Files for HTML Letters

Add New Field

[Merge Fields]: Creating Custom Merge Fields

Policy Manager > Email and letter policies > Create Custom Merge Fields

Edit Custom Merge Field

To define a custom merge field, enter a name for it and define the content. When you submit your definition, the system appends a prefix and suffix to the name you entered. When a letter that contains a custom merge field name is sent, the content is merged into the letter. ([more...](#))

Cancel

Submit

Name:

EMUG

Maximum 256 alphanumeric characters and underscores allowed, no spaces

Content:

[Insert Image](#) [Insert Special Character](#)

Custom Merge Field for EMUG 2015

[Preview in HTML Format](#)

[Merge Fields]: %Deep_System_Custom%

Edit 'Reviewer Reminder' Letter

HTML formatting tags may be used. It is not necessary to use the <HTML> or <BODY> tags.

Cancel

Preview Letter

Save

Letter Purpose:

Subject:

Letter Family:

Sender's E-mail Address

- "12.0 Demo" <demo@ariesys.com>
- Use Corresponding Editor's E-mail address
- Use Corresponding Production Editor's E-mail address

Letter Body: [Insert Image](#) [Insert Custom Merge Field](#) [Insert System Merge Field](#)

%MS_NUMBER%
%ARTICLE_TITLE%
%JOURNALFULLTITLE%

Dear %TITLE% %LAST_NAME%,

Just as a reminder, your review of manuscript number %MS_NUMBER% is due by %REVIEW_DUE_DATE%.

To access this submission please click this link to be brought to your Pending Assignments folder: %PENDING_ASSIGNMENTS_DEEP_LINK%

Kind regards,

%EDITOR_NAME%
%EDITOR_ROLE%
%CUSTOM_EMUG%

[New in v12.0]: System Merge Fields Link in Edit Letters

Insert System Merge Fields

You can drag and drop merge fields from here to the letter Subject or Body. [\(more...\)](#)

Expand All | Collapse All

%ABSTRACT%	Abstract of the manuscript
%ACCEPT_EDITOR_INVITATION%	Available for use in Editor invitation letters generated via the Suggest (more...)
%ACCEPT_INVITATION%	Inserts a hyperlink in a letter that automatically triggers the 'Author Agrees' (more...)
%ACCEPT_REVIEW_INVITATION%	Inserts a hyperlink in a letter that automatically triggers the 'Accept' (more...)

‡ When a publication uses double-blind peer review, this merge field is not populated in the copy of the Notify Author letter presented to a Reviewer.

*e.g. New in v.12.1: %ACCEPT_REVIEW_INVITATION_AND_VIEW_REVIEWER_PDF%
Will trigger an 'Accept' of the invitation and prompt a download for the the Reviewer PDF.*

[Letter Options]: Letter Content

Merge Fields – Example Email with Merge Fields & Deep Link

DEMOSGG111-D-14-00006

Suggest Reviewers.

SGG Demo 12.0

Dear Mr. Barker,

Just as a reminder, your review of manuscript number DEMOSGG111-D-14-00006 is due by Jun 16 2015 11:59:59:000PM.

To access this submission please click this link to be brought to your Pending Assignments folder: [Pending Assignments](#)

Kind regards,

Steven Gain

Editor in Chief

Custom Merge Field for EMUG 2015

[Deep Links]: Expiration

Policy Manager > Reviewer and Editor Form Policies>
Reviewer Recommendation Policies> Set Pending
Assignments Deep Link Expiration

▣ Reviewer and Editor Form Policies

Manuscript Rating Question Configuration

[Edit Manuscript Rating Questions](#)
[Overall Manuscript Rating Question Settings](#)
[Edit Manuscript Rating Instructions](#)

Reviewer Recommendation Policies

[Edit Reviewer Recommendation Terms](#)
[Create/Edit Custom Review Questions](#)
[Create/Edit Review Forms](#)
[Match Review Forms to Article Types and Reviewer Roles](#)
[Set Pending Assignments Deep Link Expiration](#)
[Set Reviewer Recommendation Deep Link Expiration](#)

Editor Decision Policies

[Edit Editor Decision Terms](#)
[Create Editor Forms](#)
[Configure Editor Forms](#)
[Editor Manuscript Rating Question Configuration](#)
[Configure Options for Review Rating](#)

[Deep Links]: Expiration

Policy Manager > Reviewer and Editor Form Policies>
Reviewer Recommendation Policies> Set Pending
Assignments Deep Link Expiration

Set Pending Assignments Deep Link Expiration

To set the expiration policy for the %PENDING_ASSIGNMENTS_DEEP_LINK%, select an option below and enter the desired number of clicks or days. If both options are selected, the link will expire as soon as the first criterion is met. To keep the link active indefinitely, do not select either option.

%PENDING_ASSIGNMENTS_DEEP_LINK%

This deep link logs the Reviewer into their Pending Assignments folder on the Reviewer Main Menu.

- Expire link after clicks
 Expire link after days

Cancel

Submit

HTML



Using HTML in your letters allows greater customization of your letter templates

[HTML]:

What is it for?

- HTML can be used for:
 - Inserting formatting (bold text, colored text, etc.)
 - Inserting images
- Deep Links display as text links in HTML
 - %PENDING_ASSIGNMENTS_DEEP_LINK%
 - <http://demosgg120/edmgr.com/l/asp?i=3328&1=LKOLO>
vs [Pending Assignments](#)

[Example HTML]: (HELP?!)

HTML opening tag	HTML closing tag	
<a href target='_blank'>		Defines a hyperlink. The "href" attribute indicates the link's destination. The target='_blank' must be included to ensure that the target page opens in a new window.
		Defines bold text.
<blockquote>	</blockquote>	Displays an indented block surrounded by blank lines.
 		Inserts a single line break. No closing tag.
<caption>	</caption>	Defines a table caption. Valid only within <table> tags.
<div>	</div>	Defines a division or section. Used to group block-level elements and to format them with CSS. Only inline CSS style declarations can be used in EM Emails.
		Defines emphasized text (most browsers display in <i>italics</i>).
<h1> <h6>	</h1> </h6>	Defines HTML headings 1 (largest) through 6 (smallest).
<hr>		Defines a thematic break in an HTML page. Used to separate content. No closing tag.
<i>	</i>	Defines a part of text in an alternate voice or mood. (Usually displayed in <i>italic</i> .)
		Displays an image. The two attributes "src" and "alt" are required. For example: (You need the full URL to put an image into an email.)
		Defines a list item in an ordered, unordered, or directory list
<mark>	</mark>	Defines marked text (used to highlight parts of text). New in HTML5.
		Defines an ordered (numbered) list, which is made up of List Item tags.
<p>	</p>	Defines a paragraph.
<small>	</small>	Defines smaller text.
		Used to group inline elements and to format them with CSS. Only inline CSS style declarations can be used in EM Emails.
		Defines important text.
_		Defines subscripted text.
[]	Defines superscripted text.
<table>	</table>	Defines a table. <td> and <tr> tags are used.
<td>	</td>	Defines a cell in a table. Used within <tr> tags.
<th>	</th>	Defines a header cell in a table. Used within <tr> tags.
<tr>	</tr>	Defines a row in a table. Used within <table> tags.
<u>	</u>	Represents some text that should be stylistically different from normal text, such as misspelled words or proper nouns in Chinese.
		Defines an unordered (bulleted) list, made up of items.

[HTML]:

System Admin> Policy Manager> Edit Letters

Edit Letters

To create a new letter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title. [\(more...\)](#)

[Back to PolicyManager](#)

Add New Letter

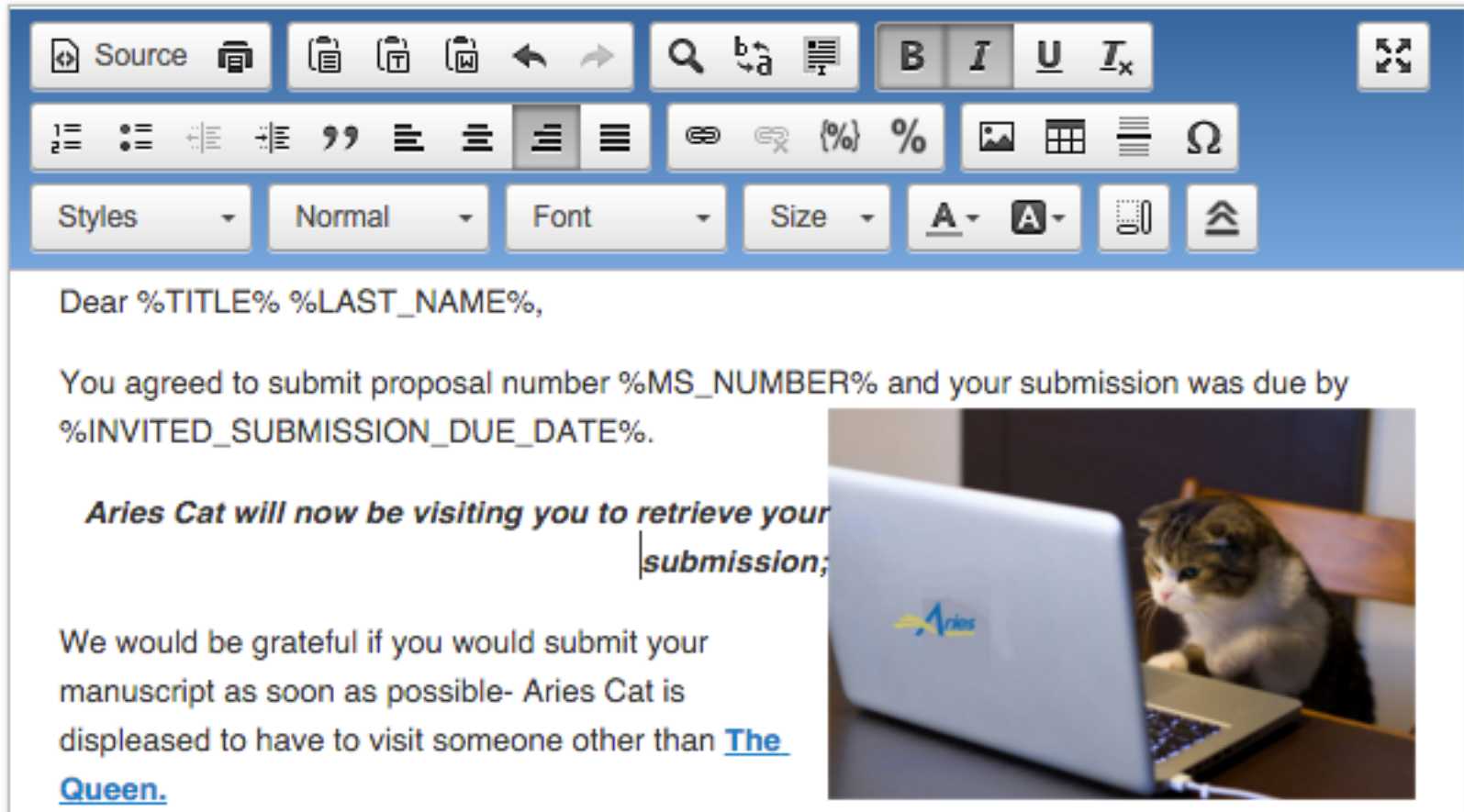
Save Changes

Edit Image Files for HTML Letters

Letter Purpose ▲▼	Letter Family Group by: ▲▼	Text Format	HTML Format	All Formats
Journal Office Notice Editor Decision Notification	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Editor Agrees to Handle Assignment	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Editor Decision Rescinded	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Declined Revision Reinstated	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice All Reviews Complete	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Author Declines to Revise	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Completed Review	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice of Proxy Registration	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice of Review Assignment	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Revised Submission	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

[New Feature coming in 12.2]: Rich Text (HTML Letter) Management

Letter Body:




The screenshot displays a rich text editor interface. The top toolbar includes icons for Source, Undo, Redo, Find, and various text formatting options like Bold (B), Italic (I), Underline (U), and Strikethrough (I_x). Below the toolbar, there are dropdown menus for Styles (set to Normal), Font, and Size. The main text area contains the following content:

Dear %TITLE% %LAST_NAME%,

You agreed to submit proposal number %MS_NUMBER% and your submission was due by %INVITED_SUBMISSION_DUE_DATE%.

Aries Cat will now be visiting you to retrieve your submission;

We would be grateful if you would submit your manuscript as soon as possible- Aries Cat is displeased to have to visit someone other than [The Queen.](#)



[Adding Images to Letters]:



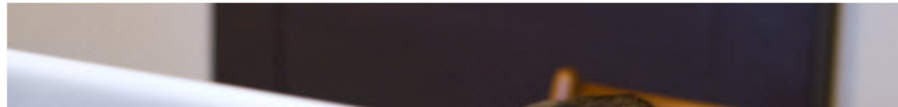
System Admin > Policy Manager > Edit Letters > Edit Image Files for Letters

----- Policy Manager -----

Share Letter	Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		
				Text	Rich Text (HTML)	All Formats
<input type="checkbox"/>	Proposal Ad Hoc	Ad Hoc For Proposal		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Requests Deadline Extension on	Ad Hoc From Author		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

Edit Image Files for Letters

Click 'Upload New Image File' to add a new image. Click 'Edit' to change the image description.

File Name	Image Description		Actions
EMlogo.png	EM logo		Download Edit/Repl
arieslogo.png	Aries Logo		Download Edit/Repl
			

[Adding Images to Letters]:




System Admin > Policy Manager > Edit Letters > Edit Image Files for Letters

Upload New Image File

Enter a Description, Browse and Upload This File to store an image file for later use in letters. The recommended file size is 50 KB or less.

[Insert Special Character](#)
Description:
Maximum 40 characters, no duplicates allowed.

File Name: Screen Shot 2... 11.27.51.png

File Name	Image Description		Actions	
EMlogo.png	EM logo		Download	Edit/Replace
arieslogo.png	Aries Logo		Download	Edit/Replace
ariescat.jpg	Aries Cat		Download	Edit/Replace

[Rich Text Email Formatting]: Non HTML Letters?

System Admin > Policy Manager > Edit Letters >

Allow sender to add Rich Text (HTML) formatting

Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

separated by semicolons (;).

cc:

Letter Body: [Insert Special Character](#) | [Insert Custom Merge Field](#) | [Add Formatting](#) [Open in New Window](#)

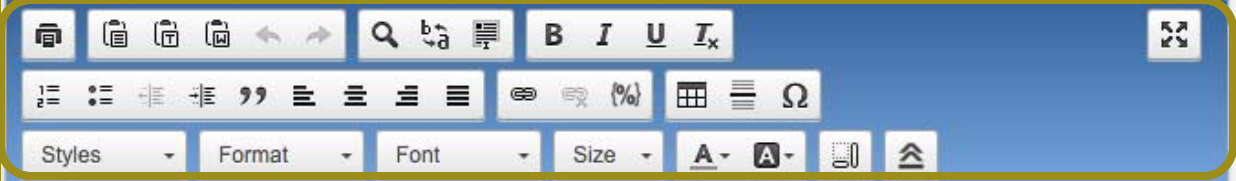
Ref.: Ms. No. %MS_NUMBER%
%ARTICLE_TITLE%
%JOURNALFULLTITLE%

Dear %TITLE% %LAST_NAME%,

My review is currently due on %REVIEW_DUE%.

cc:

Letter Body: [Open in New Window](#)



Ref.: Ms. No. %MS_NUMBER%
%ARTICLE_TITLE%
%JOURNALFULLTITLE%

Dear %TITLE% %LAST_NAME%,

[Example Email]:

w. Rich text HTML Formatting

Preview

Ref.: Proposal No. %MS_NUMBER% %ARTICLE_TITLE% %JOURNALFULLTITLE%

Dear %TITLE% %LAST_NAME%,

You agreed to submit proposal number %MS_NUMBER% and your submission was due by %INVITED_SUBMISSION_DUE_DATE%.

Aries Cat will now be visiting you to retrieve your submission;

We would be grateful if you would submit your manuscript as soon as possible- Aries Cat is displeased to have to visit someone other than [The Queen](#).

[MAKE ARIES CAT HAPPIER -CLICK HERE TO SUBMIT NOW](#)

You may also visit our website at %JOURNAL_URL%

User Name: %USERNAME% Password: %PASSWORD% If you have changed your mind and do not intend to submit, please let us know immediately With kind regards, mary mary Managing Editor MB Demo 12.2

Result

Ref.: Proposal No. ABBEY1529 Superficial examination of the benefits of the new 12.2 reviewer discussion forum functionality (whooo!!) MB Demo 12.2

Dear Worm,

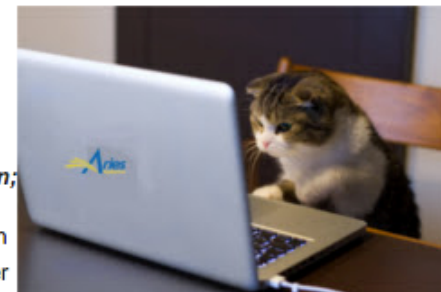
You agreed to submit proposal number ABBEY1529 and your submission was due by 22-Dec-15

Aries Cat will now be visiting you to retrieve your submission;

We would be grateful if you would submit your manuscript as soon as possible- Aries Cat is displeased to have to visit someone other than [The Queen](#).

[MAKE ARIES CAT HAPPIER -CLICK HERE TO SUBMIT NOW](#)

You may also visit our website at <http://demomb122.edmgr.com/>.



%SUBMIT_INVITED_MANUSCRIPT%

User Name: DWorm-448-793 Password: worm5000 If you have changed your mind and do not intend to submit, please let us know immediately With kind regards, mary mary Managing Editor MB Demo 12.2

Editing and Resending Letters

...

[Edit and Resend Letters]

- Any letter can be resent using the “Resend” button in the Correspondence History
- Can edit recipient, CC/BCC recipients, letter body and subject line
- Can add/remove attachments
- Role Manager permission allows editors to edit *and* resend letters

NB:

- Decision letters can not be edited
- Co-Author confirmation letters should be sent from the Author Status link on the Details Page

[Edit and Resend Letters]:

Set Permissions in Role Manager

System Admin > Role Manager > Editor Role > 'Role Name'
Edit

- View Editorial Status History
- View Editorial Correspondence History
 - Edit Letter when Resending
- Add/Edit External Correspondence
 - Add Attachments to External Correspondence
- View All Submissions
- View Completed Reviews Grid in Main Menu
- View Additional Manuscript Details
 - Edit Additional Manuscript Details
- View Notes on Manuscript Details
- Edit Notes on Manuscript Details
- Turn On Manuscript Notes Flag
- Turn Off Manuscript Notes Flag

[Edit and Resend Letters]: Additional button

View Letter

[Close](#) [Edit and Resend](#) [Resend](#)

Date: 06/09/2015
To: "Steven Gain" sgain@ariessys.com
From: "Steven Gain" sgain@ariessys.com
Subject: Email to Author


EMUG 2015 - EMID Example

[Close](#) [Edit and Resend](#) [Resend](#)

[Edit and Resend Letters]: Example

Edit and Resend Letter

Please note that merge fields cannot be populated during the resend process. Deep links will be regenerated and all previously merged fields will retain the merged text (as shown below), but newly added fields will not be merged into the letter.

From:	"Steven Gain" <sgain@ariessys.com>
To:	<input checked="" type="checkbox"/> "Steven Gain" sgain@ariessys.com (Original Recipient) Update User's Address Additional recipients can be added (separated by semicolons) but please note that in the letter sent to manually added recipients, deep links and username/password information will be replaced by asterisks. <input type="text"/>
Letter Subject:	<input type="text" value="Email to Author"/>
	If copies of the original letter were sent to additional recipients, they are listed below. You may add or remove recipients as desired. Multiple e-mail addresses can be included, separated by semicolons (;).
cc:	<input type="text" value="tbadman@ariesys.com"/>
bcc:	<input type="text"/>
 Attachment(s):	<input type="button" value="Add/Change Attachments"/>
Letter Body:	Insert Special Character <input type="button" value="Open in New Window"/>
	<input type="text" value="EMUG 2015 - Edit and Resend"/>

Managing External Correspondence



Using the system as a complete audit trail for your journals
submissions

[Managing external correspondence]:

Storing everything in Editorial Manager

- Users will sometimes provide information to the publication outside of Editorial Manager
- EM has two ways to add external information to the Correspondence History
 - Manual
 - Automated

[Managing External Correspondence]: Permissions

System Admin > Role Manager > Editor Role > Edit

- Add/Edit External Correspondence
- If Attachments feature is enabled
 - Add Attachments to External Correspondence
 - RoleManager Permission – General Searching and Viewing

- Add/Edit External Correspondence
 - Add Attachments to External Correspondence

[Managing External Correspondence]:

Add Editorial Correspondence to the correspondence history

CORRESPONDENCE HISTORY

Add Editorial Correspondence

Correspondence Date	Letter	Recipient	Status	Revision	Operator
03/11/2015	Editor Notice an Assignment was Undone	Steven Gain	Manuscript Submitted	0	Steven Gain
03/10/2015	Author Notice of Manuscript Number	John Carnevale	Manuscript Submitted	0	Steven Gain
02/24/2015	Author Verification	Elisha Daley	Manuscript Submitted	0	Steven Gain
02/24/2015	Author - Other Author Verification	Joan Lewis	Manuscript Submitted	0	Steven Gain
02/24/2015	Author - Other Author Verification	Steven Gain	Manuscript Submitted	0	Steven Gain
02/24/2015	PDF Built by Editor	Steven Gain	Manuscript Submitted	0	Steven Gain
02/24/2015	Author Verification	Elisha Daley	Manuscript Submitted	0	Steven Gain
02/24/2015	Author - Other Author Verification	Joan Lewis	Manuscript Submitted	0	Steven Gain
02/24/2015	Author - Other Author Verification	John Carnevale	Manuscript Submitted	0	Steven Gain
02/24/2015	Journal Office Notice New Submission	Joan Lewis	Manuscript Submitted	0	Steven Gain
02/24/2015	Author Submits New Manuscript Confirmation	Steven Gain	Manuscript Submitted	0	Steven Gain
02/24/2015	PDF Built and Requires Approval	Steven Gain	Needs Approval	0	Steven Gain

[Managing External Correspondence]:

Display in authors correspondence history

Add External Editorial Correspondence

Items marked with an asterisk are required. The 'Correspondence Date' and 'Description' fields will be listed on the History page. Paste or type any desired text into the 'Letter Body' area, but note that any formatting will be lost. Click 'Open in New Window' if you need extra space to edit the correspondence.

Note: Please check the text for any sensitive information that should be removed or obscured (such as passwords or names of reviewers), as the system cannot automatically anonymize correspondence you add manually. Correspondence where you enable the 'Display in Author's Correspondence History' checkbox can be viewed by the author if your publication allows this.

Cancel

Submit

Display In Author's Correspondence History

* Correspondence Date: (mm/dd/yyyy)

Time: Hour Minute AM/PM U.S. Eastern Time

* Description:

From:

To:

Letter Subject:

Attachments:

Letter Contents:

[Insert Special Character](#)

To whom it may concern.....

[Managing External Correspondence]:

Manually added correspondence shown in the
correspondence history

CORRESPONDENCE HISTORY

Add Editorial Correspondence

Correspondence Date	Letter	Recipient	Status	Revision	Operator
06/09/2015	Joy of Letters Remove Edit				Steven Gain
03/11/2015	Editor Notice an Assignment was Undone	Steven Gain	Manuscript Submitted	0	Steven Gain
03/10/2015	Author Notice of Manuscript Number	John Carnevale	Manuscript Submitted	0	Steven Gain
02/24/2015	Author Verification	Elisha Daley	Manuscript Submitted	0	Steven Gain
02/24/2015	Author - Other Author Verification	Joan Lewis	Manuscript Submitted	0	Steven Gain
02/24/2015	Author - Other Author Verification	Steven Gain	Manuscript Submitted	0	Steven Gain
02/24/2015	PDF Built by Editor	Steven Gain	Manuscript Submitted	0	Steven Gain
02/24/2015	Author Verification	Elisha Daley	Manuscript Submitted	0	Steven Gain
02/24/2015	Author - Other Author Verification	Joan Lewis	Manuscript Submitted	0	Steven Gain
02/24/2015	Author - Other Author Verification	John Carnevale	Manuscript Submitted	0	Steven Gain
02/24/2015	Journal Office Notice New Submission	Joan Lewis	Manuscript Submitted	0	Steven Gain
02/24/2015	Author Submits New Manuscript Confirmation	Steven Gain	Manuscript Submitted	0	Steven Gain
02/24/2015	PDF Built and Requires Approval	Steven Gain	Needs Approval	0	Steven Gain

[Managing External Correspondence]: Automatic import via E-Mail Drop-Box

- Allows e-mail responses to letters originating from EM to be imported into the Correspondence History of the related submission
- Emails to be imported are forwarded to a unique drop box e-mail address created by Editorial Manager
- Emails are matched to the correct submission using a unique identifier (EMID) that is inserted into to subject line of outgoing emails

[Managing External Correspondence]:

EMID for Email Import of external correspondence

- What is an EMID?
 - A unique code appended to the subject line of an email
 - Example: [EMID:ed06f6b074241c34]
 - Used to link external email to EM submission
 - Must have an EMID in subject line to be properly ingested
- Configured in PolicyManager

[Managing External Correspondence]:

Policy Manager > Email and letter policies > Configure
Email Import

PolicyManager Main Menu

[Expand All](#)

[Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊕ **Submission Policies**
- ⊕ **Questionnaire Policies**
- ⊕ **Additional Data Policies**
- ⊕ **Editor Assignment Policies**
- ⊕ **Reviewer and Editor Form Policies**
- ⊖ **E-mail and Letter Policies**
 - [Edit Letters](#)
 - [Define Custom Merge Fields](#)
 - [Set "Email From" Address](#)
 - [Set Non-Email "Preferred Method Of Contact" Correspondence Email Address](#)
 - [Set Notify Author Blinding Policy](#)
 - [Configure Email Import](#)
 - [Set Notify Editor Preference](#)

[Managing External Correspondence]: Configure Email Import

Configure Email Import

A user who receives replies, outside the system, to system-generated Emails may add them to the appropriate Correspondence History by forwarding them to the 'Drop-Box' address displayed below, once submitted.

If you generate and submit a new address, any previous address is made inactive and cannot be used again (this allows you to retire an address that has become a target for spam Emails). Clear the address and submit the page to turn off the ability to import mail into the publication.

You must submit this page for any changes to the Drop-Box Address to take effect. You should inform anyone who forwards mail in this way immediately of any changes to this address.

Set 'Drop-Box' Email Address:

em.demosgg120-1854397f2f8f8556@editorialmanager.com

Generate New Address

Clear Address

Once activated, the system will attempt to import Email sent to the 'Drop-Box' address. If this import fails, and the mail subject line contains a valid import identifier code created by EM, then the system can forward the failed Email to a contact address for notification. To enable failure notifications, type in the desired Email address below. Delete this address to disable this feature.

Set Email Address for Failure Notifications:

sgain@ariessys.com

Cancel

Submit

[Managing External Correspondence]: External E-Mail Drop-Box

Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/Category ▲▼	Article Title ▲▼
View Submission Duplicate Submission Check (0%) Details ▼ Initiate Discussion History Technical Check File Inventory Edit Submission Send Back to Author Remove Submission Classifications Set Final Disposition Initiate Production Send E-mail Linked Submissions		Demo		EMUG 2015

[Managing External Correspondence]: External E-Mail Drop-Box

From: em.demosgg120.1.43b2d4.968b7813@editorialmanager.com on behalf of Steven Gain <em@editorialmanager.com>
To: Steven Gain
Cc:
Subject: **Email to Author - [EMID:b53494aef76c2512]**

Sent: Tue 6/9/2015 10:23 AM

EMUG 2015 - EMID Example

[Managing External Correspondence]: External E-Mail Drop-Box



The screenshot shows an email client interface with a 'Send' button on the left. The 'To...' field contains 'Steven Gain'. The 'Cc...' field is empty. The 'Subject:' field contains 'RE: Email to Author - [EMID:b53494aef76c2512]'. The main text area contains the text 'Reply from author.' followed by a horizontal line and the following email header information:

From: em.demosgg120.1.43b2d4.968b7813@editorialmanager.com [mailto:em.demosgg120.1.43b2d4.968b7813@editorialmanager.com] **On Behalf Of** Steven Gain
Sent: Tuesday, June 09, 2015 10:23 AM
To: Steven Gain
Subject: Email to Author - [EMID:b53494aef76c2512]

Below the header, the text 'EMUG 2015 - EMID Example' is visible. A vertical scrollbar is on the right side of the text area.

[Managing External Correspondence]: External E-Mail Drop-Box

Send

To... em.demosgg120-1854397f2f8f8556@editorialmanager.com

Cc...

Subject: FW: Email to Author - [EMID:b53494aef76c2512]

|

From: Steven Gain
Sent: Tuesday, June 09, 2015 10:27 AM
To: Steven Gain
Subject: RE: Email to Author - [EMID:b53494aef76c2512]

Reply from author.

From: em.demosgg120.1.43b2d4.968b7813@editorialmanager.com [<mailto:em.demosgg120.1.43b2d4.968b7813@editorialmanager.com>] **On Behalf Of** Steven Gain
Sent: Tuesday, June 09, 2015 10:27 AM

[Managing External Correspondence]: External E-Mail Drop-Box

CORRESPONDENCE HISTORY

Add Editorial Correspondence

Correspondence Date	Letter	Recipient	Status	Revision	Operator
06/11/2015	Imported E-mail (External) Remove Edit				
06/11/2015	General Email to Author	Jeff Tassi	With Editor	0	Steven Gain

[Case Study]:

Some of our letter templates include the journal's impact factor, so each journal has a different one.

If we share various templates across our sites – can we still use a custom merge field on each journal to populate the impact factor?

Any Questions?

Thank you