



Publish Faster. Publish Smarter.

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# EMUG 2023



**Courtyard Boston Downtown Hotel**  
**June 14-15, 2023**

**Aries**  
systems.



# EMUG 2023

## Effective Communication: Letters and More

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# Agenda

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Welcome to  
EMUG: Day 2

- Custom Letter Templates
- Letter Families
- Merge Fields
- Person-based Correspondence History
- Drop-box Configuration
- Co-Author Verification Status
- People and Submission Flags
- Resources
- Questions from Attendees

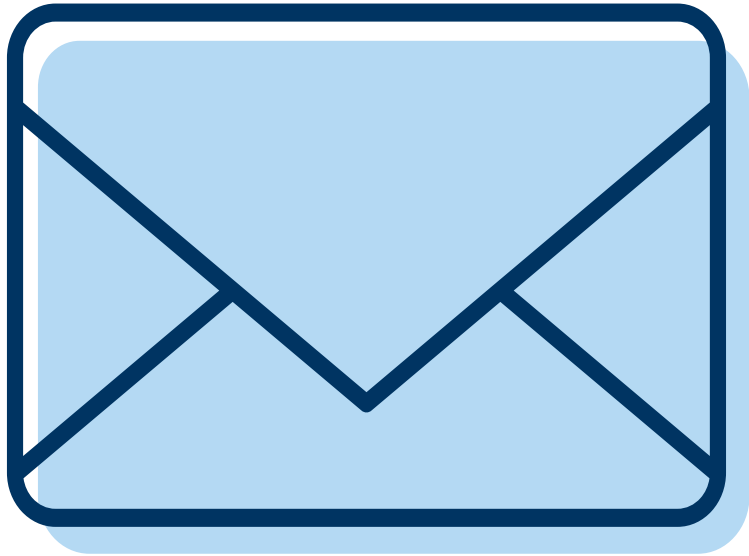
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# Effective Communication Matters in EM

- Communication via email/letters is a cornerstone of how EM is structured
- Maintain deadlines across peer-review and production
- Assignments, invitations, external correspondence, etc.
- Communication methods come in many forms





# Letter Families

# Letter Families

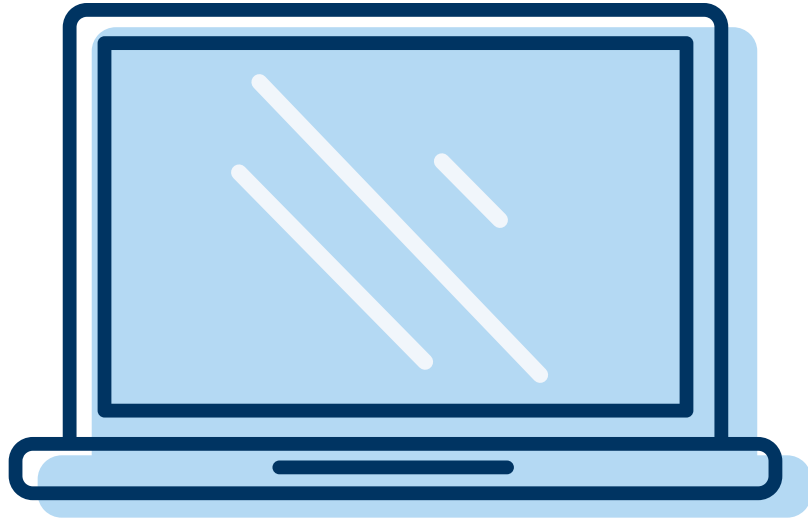
## Why letter families?

- Group letters by context. Think about your local recycling center!
- Letter families influence letter configuration options
- Limits letter selections to specific family
  - EX. Reviewer invitation

Letter Purpose:	Reviewer Invitation
Subject:	You Are Invited to Review!
Letter Family:	Reviewer Invitation

- Auto Pagination has completed successfully.
- Batch E-mail
- Co-Author Communications
- Communications to Author
- Decision
- Discussion Forum
- Editor Reminder
- Enterprise Analytics Reporting
- Full Text Xml Process Error
- Full Text Xml Process Success
- General
- Invite/Assign/Unassign Editor
- Production
- Production Reminder
- Publication Charges
- Reviewer Invitation
- Reviewer Notification
- Reviewer Reminder
- Terminate Assignments
- The Auto Pagination task failed or was cancelled.





# Custom Letter Templates



# Custom Letter Templates

- Templates for all letters must be configured within EM to be available for sending
- Users can create letters from scratch or edit existing letter templates
- Templates can be created/edited individually or across all sister publications

## Why use Templates:

- More efficient
- Customizable
- Consistent voice
- Increased quality
- Automatic workflow triggers



# Letter Template: Create New

## ☰ E-mail and Letter Policies

### [Edit Letters](#)

[Define Custom Merge Fields](#)

[Set "Email From" Address](#)

[Manage Preferred Method of Contact Settings](#)

[Configure Waiver Request](#)

[Configure Email Import](#)

[Set Notify Author Blinding Policy](#)

[Set Notify Editor Preference](#)

### Edit Letters

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

The master site may have already subscribed this site to shared letter templates. If so, these are designated with a  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"/>	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
<input type="checkbox"/>	Author Approve Changes	General		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Author Changed Invited Due Date Confirmation	General	Author - Invited Submission Due Date Changed	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Author Instructions and Due Date	General	Author - Author Agrees to Invitation	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Author Invitation for Commentary	Author Invitation	Author - Solicit Commentary on Submission	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide



# New Letter Template: Purpose & Family

## Add 'General' Letter

Please type (or paste) a text-formatted letter into the Letter Body box below. This default letter should not include HTML tags. To incorporate HTML tags, click 'Save' on this page to save the text-formatted letter and then select the 'HTML format' radio button from the 'Edit Letters' page and click the Edit link. HTML tags may then be added.

Letter Purpose:	<input type="text" value="Reviewer Thank You"/>
Subject:	<input type="text" value="Thanks for Reviewing a Manuscript!"/>
Letter Family:	<input type="text" value="General"/> ▼

Cancel

Continue



# New Letter Template: Instructions

## Edit 'General' Letter

Cancel

Preview Letter

Save

Custom  
Instructions

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.

[View Default Instructions](#)

[Revert to Default Instructions](#)

Letter Purpose: Reviewer Thank You

Subject: Thanks for Reviewing a Manuscript!

Letter Family: General



# New Letter Template: Drafting Message Body

Letter Body: [Insert Special Character](#) | [Insert Merge Field: Custom](#) | [System](#)

Hello,


Thanks for taking the time to review this manuscript.

You may access your review comments and the decision letter (when available) by logging on to the Editorial Manager site.

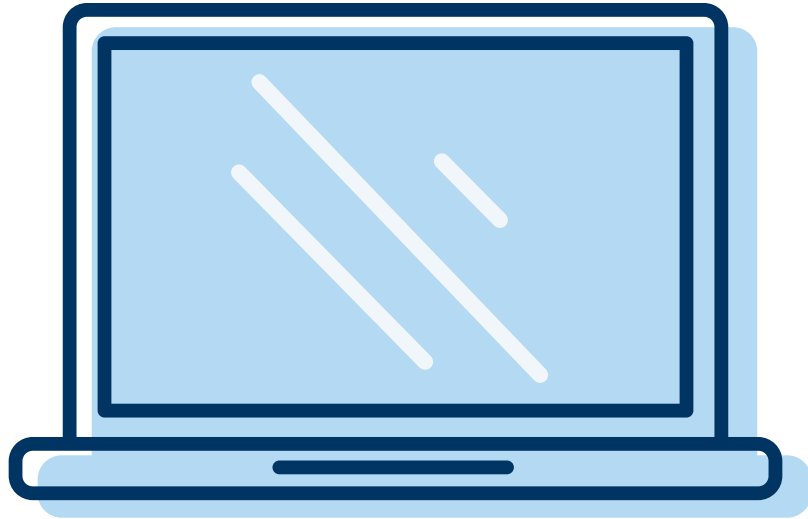
Please let us know if you have any questions.

Thank you,

Mary Mary  
Managing Editor  
NH Animal Rescue Association







**%MERGE\_FIELDS%**

# System Merge Fields

PolicyManager > Edit Letters

Letter Body: [Insert Special Character](#) | [Insert Merge Field: Custom](#) | [System](#)

.  
Dear %TITLE% %LAST\_NAME%,  
Thank you for registering for the Editorial Manager online submission and peer review tracking system for %JOURNALFULLTITLE%.

- Automatically pull in specific information
- Avoid editing errors (title, name, ms number, etc.)
- Insert merge field into letter template



# System Merge Fields

Manually write merge field into letter or drag and drop merge field from system list

Letter Body: Insert Special Character | Insert Merge Field: Custom | System

Dear %TITLE% %LAST\_NAME%,

Thank you for registering for the Ed

Here is your username, which you r

Username: %USERNAME%

If you do not know your confidentialia

Please save this information in a sa

You can change your password and link on the menu

**Insert System Merge Fields** ✕

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

✕ Expand All | Collapse All

- %GROUP\_JOURNALS%
- %JOURNAL\_URL%
- %JOURNALACRO%

TITLE%.

cking on the Update My Information





# System Merge Fields: Populated Letter

Dear Dr. Wasiewski,

Thank you for registering for the Editorial Manager online submission and peer review tracking system for DEMO KM Site (CS Site).

Here is your username, which you need to access the Editorial Manager at <https://www.editorialmanager.com/demokm/>.



# Custom Merge Field

## PolicyManager> Define Custom Merge Fields

**Name:**

*Maximum 256 alphanumeric characters and underscores allowed, no spaces*

**Content:** [Insert Image](#) [Insert Special Character](#)

I'd also like to thank you so much for submitting with our journal; your hard work is greatly appreciated.

[Preview in HTML Format](#)

- Useful for common phrases
- Similar to Editor Decision Phrases, but more versatile
- Create/edit merge fields individually or across sister journals

# Custom Merge Fields

Letter Body: Insert Special Character | Insert Merge Field: Custom | System

Dear %TITLE% %LAST\_NAME%,

Your submission entitled "%ARTICLE\_TITLE%" has been received by journal %JOURNALFULLTITLE%


You will be able to check on the progress of your paper by logging on to Editorial Manager as an author. The URL is %JOURNAL\_URL%.

Your manuscript will be given a reference number once an Editor has been assigned.

**%CUSTOM\_MARYS\_THANK\_YOU\_TO\_AUTHOR%**

Kind regards,

%EDITOR\_NAME%  
%EDITOR\_ROLE%  
%JOURNALFULLTITLE%



Users can insert a custom merge field into a letter template

# Custom Merge Fields: Populated Letter

Dear Miss Massicotte,

Your submission entitled "THE MOON SINCE APOLLO: MAJOR HYPOTHESES AND ENABLING FACTORS" has been received by journal DEMO KM Site (CS Site)

You will be able to check on the progress of your paper by logging on to Editorial Manager as an author. The URL is <https://www.editorialmanager.com/demokm/>.

Your manuscript will be given a reference number once an Editor has been assigned.

I'd also like to thank you so much for submitting with our journal; your hard work is greatly appreciated.

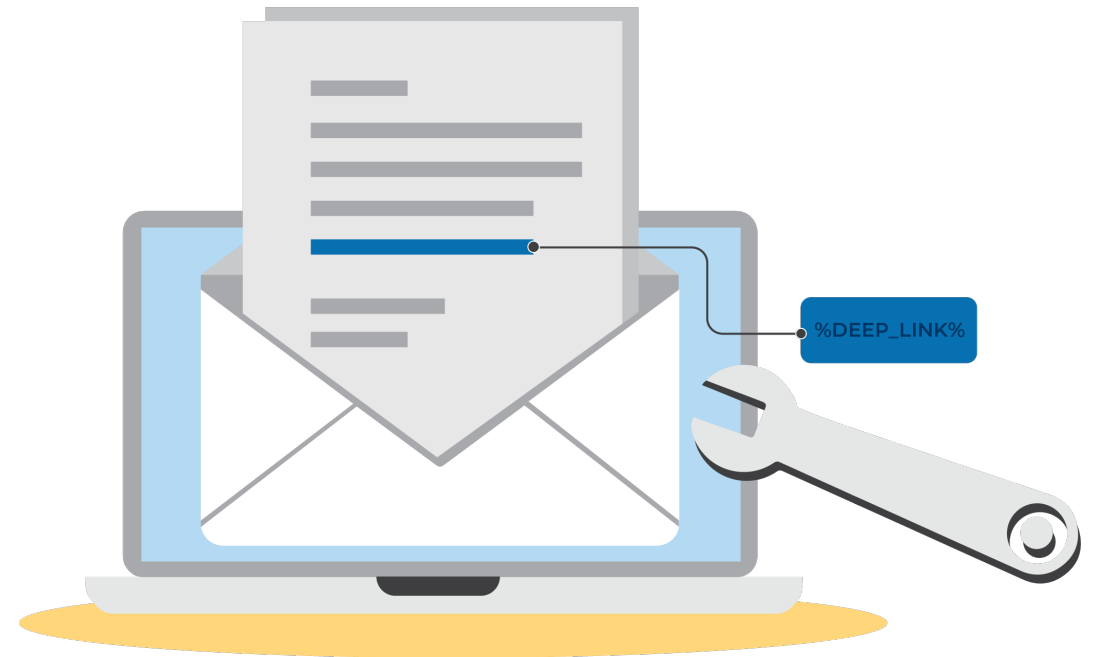
Kind regards,



# Deep-Linking Merge Fields

Clickable text/URL that directs the recipient to a particular page in the system for information or action

- Some merge fields insert a deep link into a letter
- Used in specific emails to specific roles (inviting/assigning)
- Only populate to primary recipient
- Expiration rules are set in 'PolicyManager'

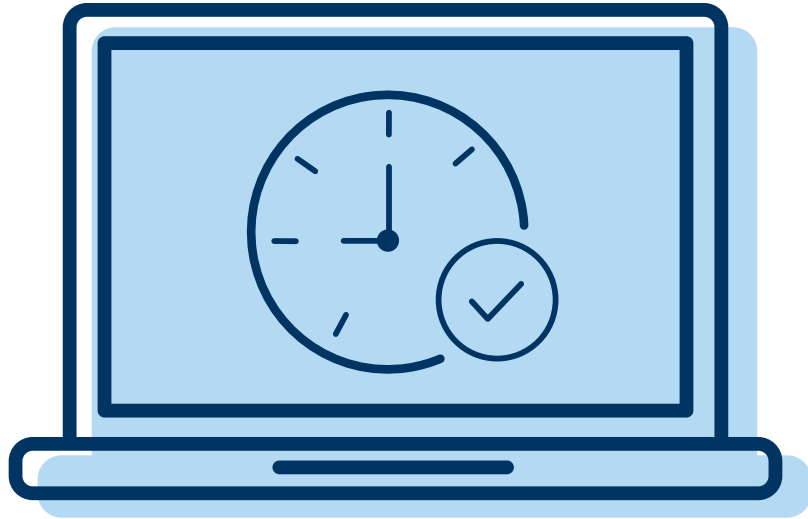


# Deep-Linking Merge Fields

## Recommendations

- Users should log out before clicking a deep link
- Do not bookmark a page reached via deep link (link will expire)
- Adding the journal's home page link first in a letter may help prevent security systems from clicking the desired deep link first
- Enable CAPTCHA to shield deep links from email security
  - AdminManager> Configure Deep Links





# Correspondence History

*People-based records*



# People-Based Correspondence History

- User-centric
- Manifest of all correspondence a user has sent and received
- All letters have easy access for users
- Easily surface communications

Correspondence History				
Page: 1 of 1 (8 total correspondence)			1	100 results
Correspondence Date	Letter	Recipient	Manuscript Number	Article Title
03/04/2022 11:46:43	Editor Decision - Accept	Taylor Test	DEMOKM-D-22-00002R1	Dog Nutrition
03/04/2022 11:44:10	Author Submits Revision Confirmation	Taylor Test	DEMOKM-D-22-00002R1	Dog Nutrition
03/04/2022 11:43:36	PDF Built and Requires Approval	Taylor Test	DEMOKM-D-22-00002R1	Dog Nutrition
03/04/2022 11:40:59	Editor Decision - Revise	Taylor Test	DEMOKM-D-22-00002R1	Dog Nutrition
03/02/2022 15:24:59	Author Notice of Manuscript Number	Taylor Test	DEMOKM-D-22-00002R1	Dog Nutrition
03/02/2022 15:02:25	Author Submits New Manuscript Confirmation	Taylor Test	DEMOKM-D-22-00002R1	Dog Nutrition
03/02/2022 14:59:51	PDF Built and Requires Approval	Taylor Test	DEMOKM-D-22-00002R1	Dog Nutrition
03/02/2022 14:46:50	Welcome	Taylor Test		





# Correspondence History: Customization

- Can sort by date of correspondence
- Powergrid-style customization

**Correspondence History for mary mary**

Choose Fixed Date Range: All Dates

Enter Customized Date Range (mm/dd/yyyy): Start Date:   End Date:

**Correspondence History**

Page: 1 of 2 (115 total correspondence) 1 2 ▶▶ 100 results per page. ⚙️

Correspondence Date	Letter	Recipient	Manuscript Number	Article Title
05/16/2023 14:36:08	Author Notice of Manuscript Number	mary mary	DEMOKM-D-23-00004	Test-
05/16/2023 14:31:49	Journal Office Notice New Submission	mary mary	DEMOKM-D-23-00004	Test-
05/16/2023 14:31:49	Author Submits New Manuscript Confirmation	mary mary	DEMOKM-D-23-00004	Test-
05/16/2023 14:31:15	PDF Built and Requires Approval	mary mary	DEMOKM-D-23-00004	Test-
05/16/2023 13:55:18	Author Notice Submission Removed	mary mary	Unassigned	Test



# Correspondence History: Customization

**Grid Options**

The columns below are available to be included in this table. Please select the ones you would like to see by marking the "Show" checkbox. You may also lock columns in place so that regardless of your position in the grid you will be able to see the contents. These columns appear together on the left side and are selected by marking the "Fixed" checkbox.

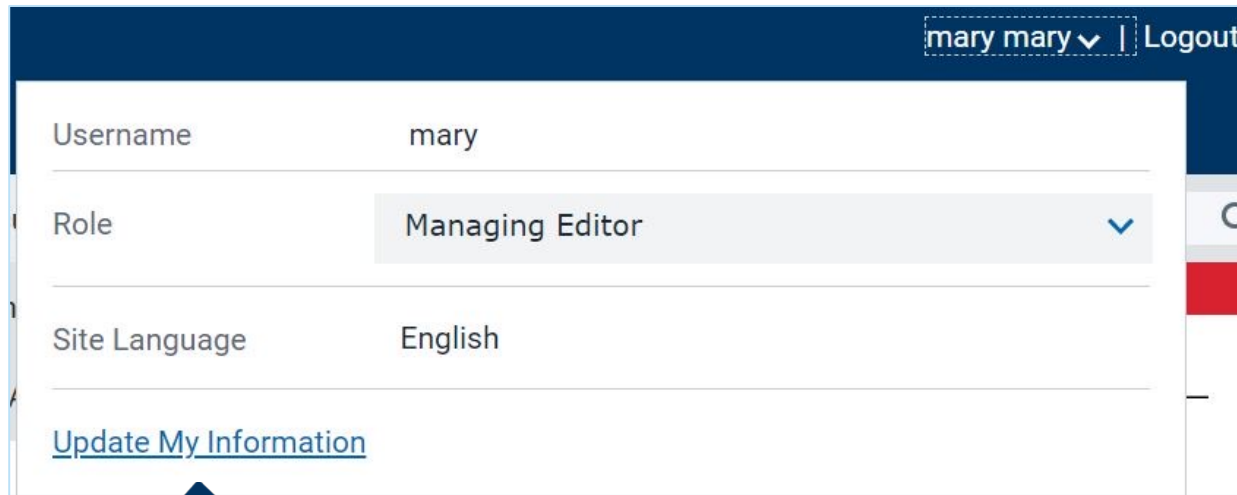
Column Header	Fixed	Show
Correspondence Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manuscript Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Letter	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Article Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Recipient	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Same 'fix/show' functionality as a Submission Search



# Correspondence History: Viewing Your History

- “Update My Information” link
- No permissions required



A screenshot of a user profile page. At the top right, it shows the user's name 'mary mary' with a dropdown arrow and a 'Logout' link. Below this, there are three rows of information: 'Username' with the value 'mary', 'Role' with a dropdown menu showing 'Managing Editor', and 'Site Language' with the value 'English'. At the bottom left of the profile area, there is a blue underlined link that says 'Update My Information'. A blue arrow points upwards from below the page towards this link.

## Update My Information

To update any information, make the changes on the form and click Submit. Required fields have an asterisk next to the label.

[Edit 'Go to' Publication List](#)

[Correspondence History](#)



# Correspondence History: Viewing Others'

- Two different ways via "Search People"



Merge People	Name	City	State or Province	Country	Author Role	Reviewer Role	Editor Role	Publisher Role	View Correspondence History
<input type="checkbox"/>	Talia Test			UNITED STATES	[Author]	[Reviewer]			<a href="#">Correspondence History</a>
<input type="checkbox"/>	Mina Sullivan			UNITED STATES	[Author]	[Reviewer]			<a href="#">Correspondence History</a>
<input type="checkbox"/>	Sally Solicitor			UNITED STATES	[Author]	[Scientific Reviewer]			<a href="#">Correspondence History</a>
<input type="checkbox"/>	Mina Rowe			UNITED STATES	[Author]	[Reviewer]			<a href="#">Correspondence History</a>
<input type="checkbox"/>	Bob Ross			UNITED STATES	[Author]	[Reviewer]			<a href="#">Correspondence History</a>
<input type="checkbox"/>	Robert Reviewer			UNITED STATES	[Author]	[Reviewer]			<a href="#">Correspondence History</a>
<input type="checkbox"/>	Richard Reviewer			UNITED STATES	[Author]	[Reviewer]			<a href="#">Correspondence History</a>
<input type="checkbox"/>	Remy Referee			UNITED STATES	[Author]	[Reviewer]	[Editor in Chief]		<a href="#">Correspondence History</a>
<input type="checkbox"/>	Paul Publisher			UNITED STATES	[Author]	[Reviewer]		[Publisher]	<a href="#">Correspondence History</a>



# Correspondence History: Viewing Others'



<input type="checkbox"/>	<a href="#">Paul Publisher</a>		UNITED STATES
--------------------------	--------------------------------	--	---------------

- Find via user's People Record

**User Information**

The default login role is the user role that will be used if you strike the enter key when logging in and you have not made a specific selection.

Default Login Role:

Default Login Menu:

Available as a Reviewer? Yes  No

Board Member? Yes  No

Forbidden as a Reviewer? Yes  No

Reviewer Role \*

Publisher Role \*

Editorial Role \*

Editor Description

[Activity Details](#)

[Correspondence History](#)

[Additional People Details](#)



# Correspondence History: Permissions

## ☐ Viewing and Editing People Data

### Search People

Send Username and Password

Change ORCID ID

Change E-mail Address

Change Preferred Method of Contact

Change Editor Role Designation to/from :  
ALL EDITOR ROLES ▲  
Associate Editor  
Editor  
Editor in Chief  
Managing Editor ▼

Change Publisher Role Designation to/from:  
ALL PUBLISHER ROLES ▲  
Publisher ▼

### View Personal Correspondence History

- View Submission Production Correspondence History
- View Schedule Group Production Correspondence History

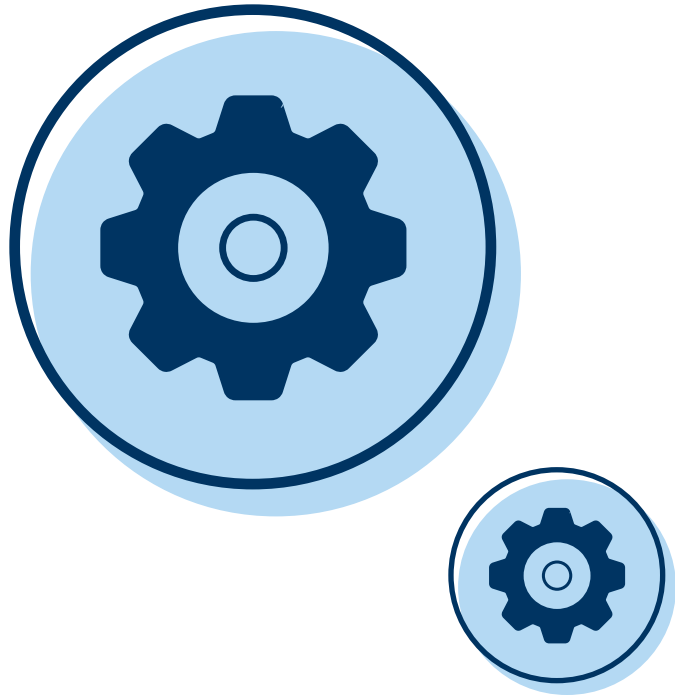


# Personal Correspondence History Restrictions

- Blinded Editors
- Cannot be viewed while in proxy mode
- Production task/Schedule group production task correspondence history won't appear without corresponding permissions







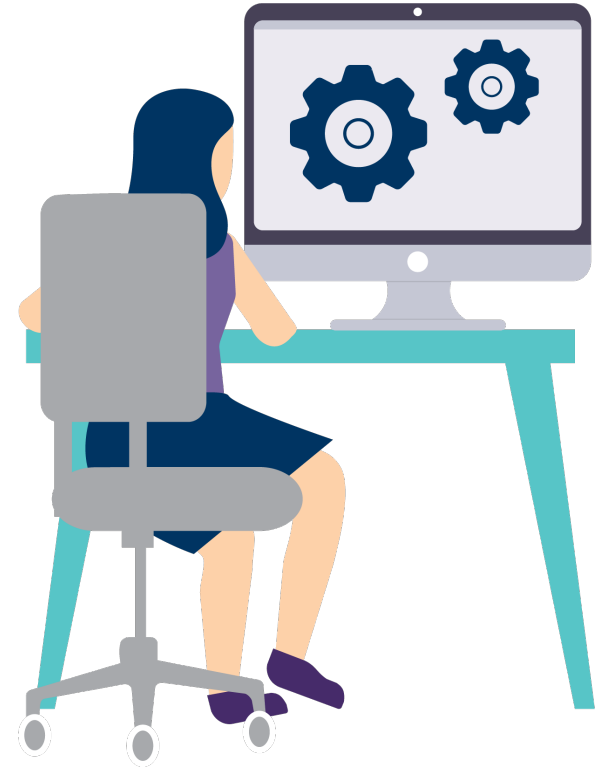
# Drop-box Configuration



# Drop-Box Configuration

PolicyManager > Configure Email Import

- Users have the option to generate a 'Drop-box' email address or create a unique one
- External correspondence (reply to system email) can be forwarded here
- Ideal for Editors who work with multiple EM sites



# Drop-Box Configuration

## Personalized drop-box email address

### Configure Drop-Box Email Address

Enter the configurable portion of the drop-box email address in the box below. The prefix and suffix cannot be changed. The drop-box email address:

- Can only include letters, numbers, periods (.) and dashes (-).
- Cannot be reused once it has been cleared.
- Becomes active when the Submit button is clicked on the Configure Email Import page.

em.demojcbeta-  @editorialmanager.com

Cancel

Save



# Drop-Box Configuration

Check the box to display to display in history

**Set 'Drop-Box' Email Address:**  
Creating and submitting a new address will permanently replace any existing address. This allows a publication to retire an address that has become a target for spam emails. (Previously used addresses cannot be used again.)

No address configured. Email will not import into this publication.

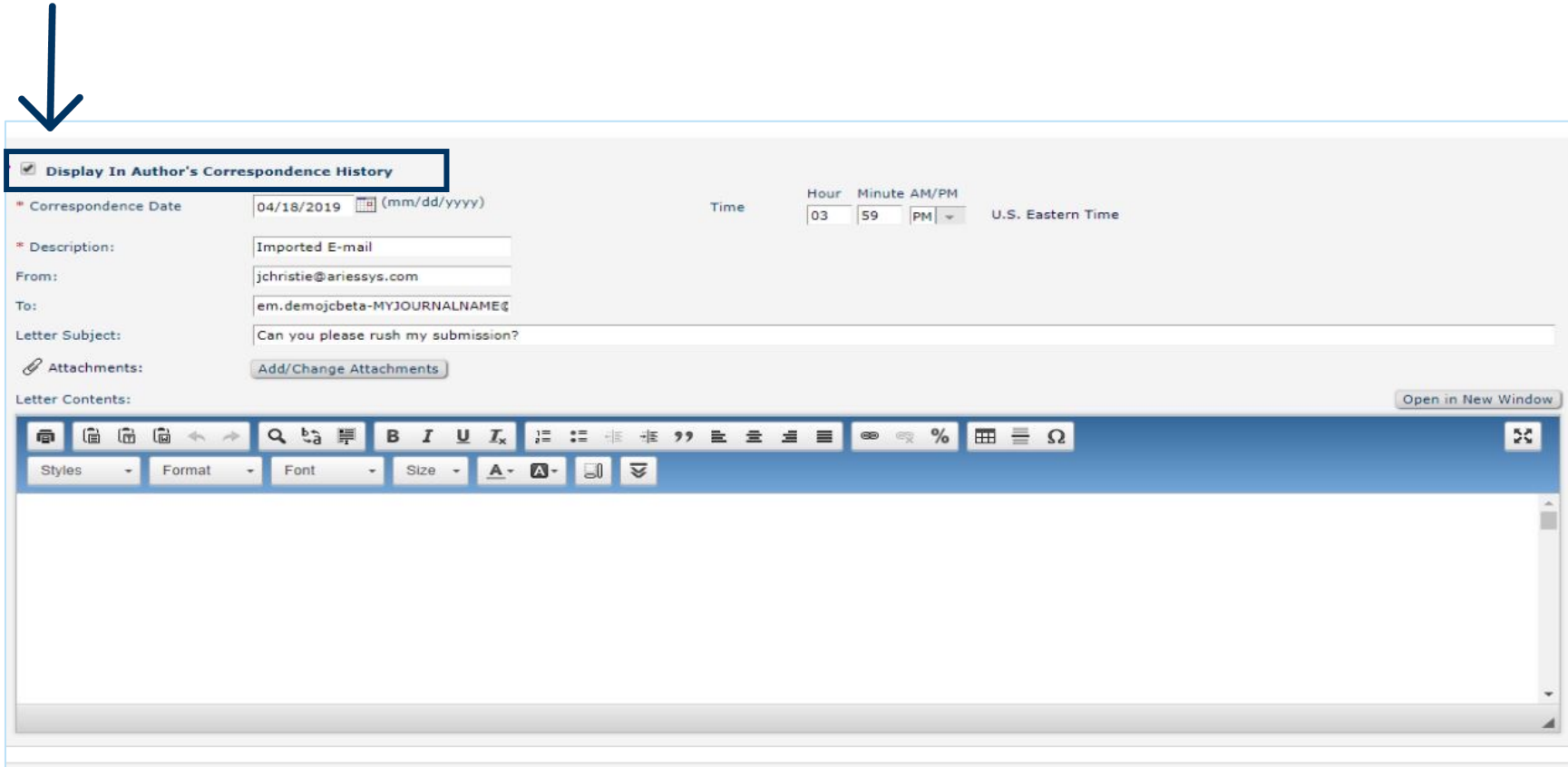
Configure drop-box email address manually  
 Generate drop-box email address automatically

Display imported email subject in Correspondence History - This option displays the subject line of an imported email in the Letter column.

Apr 18, 2019	Can you please rush my submission? (External)	Remove Edit
--------------	-----------------------------------------------	-------------



# Drop-Box Configuration



Display In Author's Correspondence History

\* Correspondence Date: 04/18/2019 (mm/dd/yyyy) Time: Hour: 03 Minute: 59 AM/PM: PM U.S. Eastern Time

\* Description: Imported E-mail

From: jchristie@ariessys.com

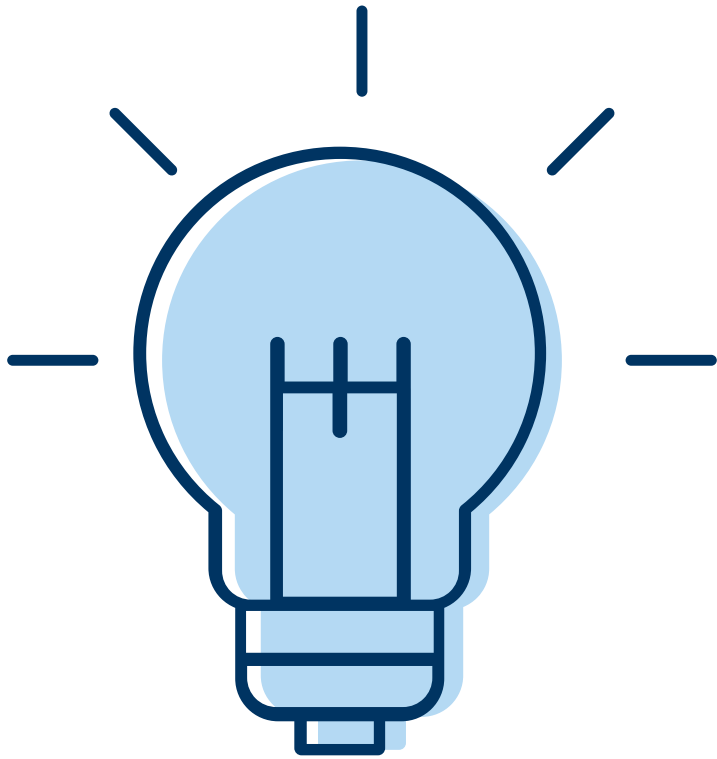
To: em.demojcbeta-MYJOURNALNAME

Letter Subject: Can you please rush my submission?

Attachments: Add/Change Attachments

Letter Contents: Open in New Window

- Editors with permission can edit the imported email
- Option to display in Correspondence History (if Authors have permission)



# Co-Author Verification Status

# Co-Author Verification Status

PolicyManager > Edit Article Types

- Allows other Authors to confirm contribution to a submission
- Late/missing responses do not inhibit peer-review process

## Register/Verify Other Authors

Co-Authors register and verify on new submission ▼

Authenticated ORCID iD Request: Optional ▼

Display Author Questionnaire to Co-Authors



# Co-Author Verification Status

Co-Authors are sent verification letter with two links to confirm or deny affiliation

Re: Hope All My Co-Authors Verify Correctly!  
by mary mary

Dear Coauthor,

You have been listed as a contributing author for the above manuscript. Please verify your contribution by clicking one of the below links.

Yes, I am affiliated: <https://www.editorialmanager.com/demojcbeta/l.asp?i=703&l=ZJSBR14S>

No, I am not affiliated: <https://www.editorialmanager.com/demojcbeta/l.asp?i=704&l=A8HIMMBN>

Thank you,

DEMO JC Beta Site (CS Site)



# Co-Author Verification Status

Insert Special Character

**Verify Contributing Authorship**

---

If you are unable to complete your responses at this time, please click on the "Save for Later" button to save your work. To return to this page later, click on the Verify deep link in the email that you were sent regarding this submission, or save the following URL and enter it in your browser's address bar.

<http://www.editorialmanager.com/demojcbeta/l.asp?i=760&l=GB0P3N0E>

---

Please respond to the questions/statements below and click on the "Submit to Publication" button to complete your Co-Author verification for the submission.

If you do not submit your responses, your contribution will not be confirmed. If you click on the "Save for Later" button, your contributing authorship will not be confirmed, but you can return to this page later to complete your responses.

---

Please confirm you have approval from all Co-authors to submit this paper?

Yes

- After verifying, users can fill out the Author Questionnaire (if configured)
- Users may confirm now or save answers for later



# Co-Author Verification Status

- Editors can manually update verification status for co-Authors
- Update via "Change" link on Author status page in Details

View Submission  
Duplicate Submission Check  
Details ▾

Other Authors:

- Casey Coauthor ?
- Marc Savard ?

Author Status

Order	Author Name	Added in Revision	Email Address	ORCID Identifier	Academic Degree(s)	Affiliation	Confirmed?	Options
2	Casey Coauthor ?	R0	jeffttest47@yahoo.com Edit				<b>Declined:</b> Apr 22, 2019 Change	Reset Confirmation Status View Author Details Questionnaire Not Completed



# Co-Author Verification Status



**Change Co-Author Verification Status**

To change this co-author's verification status, please select from the choice(s) below and click the 'Save' button. If you want to retain the co-author's current verification status, click the 'Cancel' button.

Yes/Confirmed

↑

Save Cancel

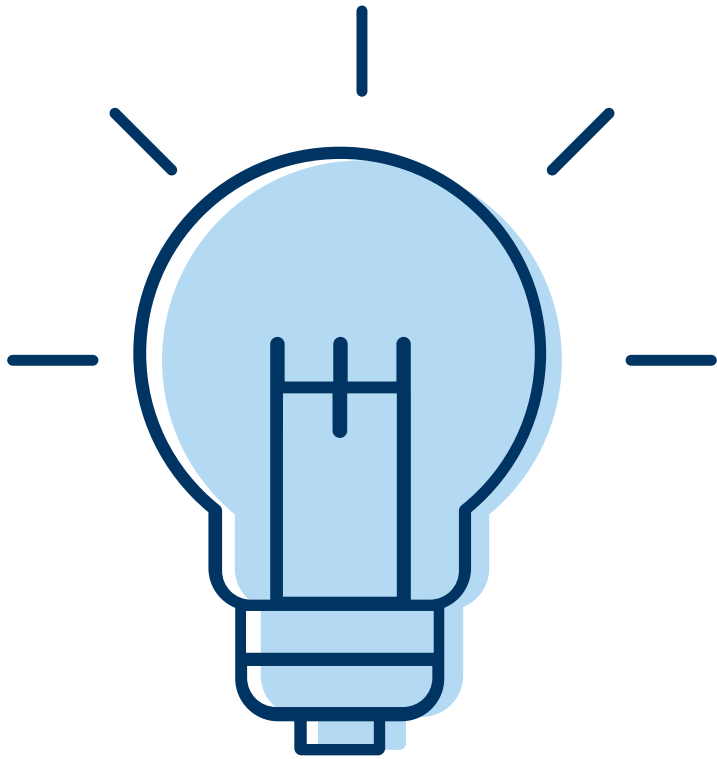
- Available options not chosen by the co-Author can be selected
- Editors cannot answer co-Author questionnaires on their behalf (if configured)

# Co-Author Verification Status

RoleManager sub-permission for Editors

- Manage Other Authors
  - Edit Other Author E-mail Address
  - Set Other Author Verification Status

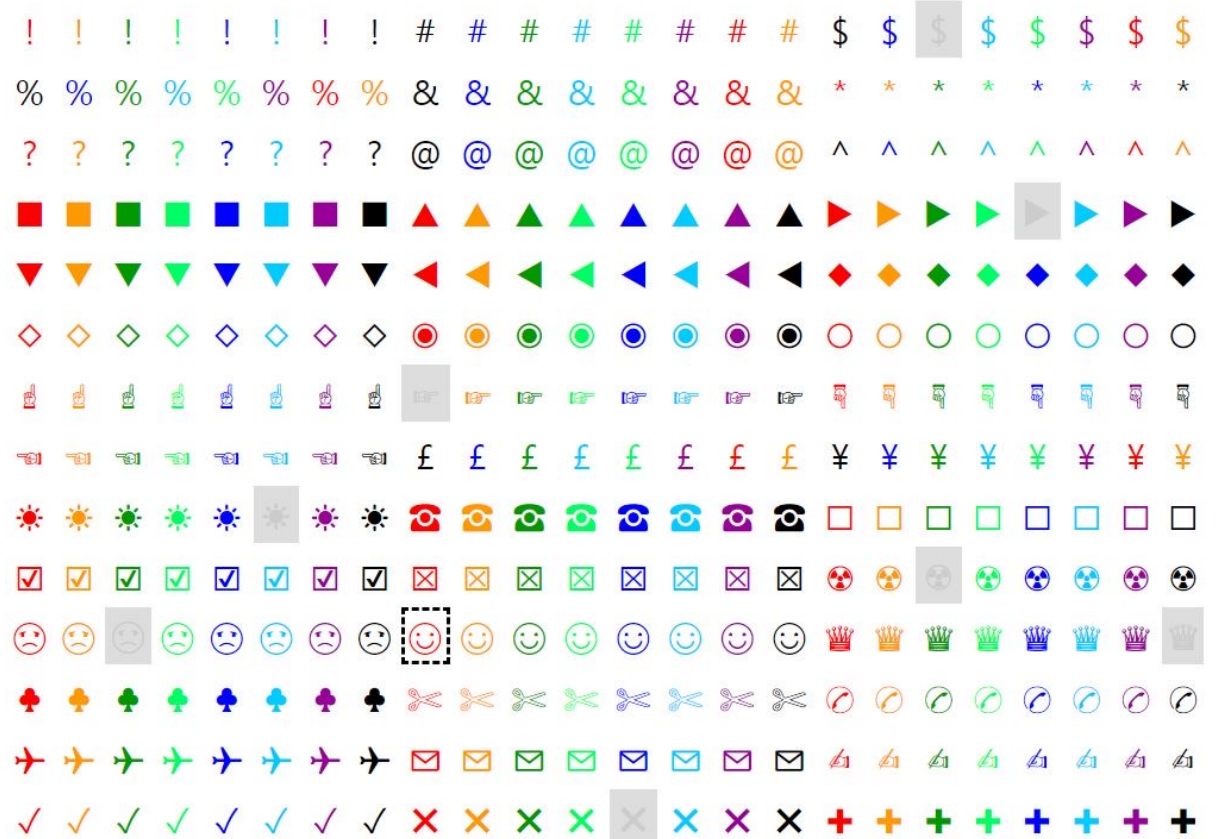




# People and Submission Flags

# People and Submission Flags

- Creative method to grab Editor's attention and promotes visibility
- Convenient indicators save editorial staff time
- People and submission flags pull from the same library
- Flags can only be used once but there are many to choose from!



# Submission Flag Use Cases

- People Flags
  - Preferred Reviewer
  - Reviewer Unavailable
  - Permission required to review
  - Conference Editor
- Submission Flags
  - Submission Fee Paid
  - Reviewer 1's Attachment Blinded
  - Missing Title Page
  - Missing Copyright Information



# People and Submission Flags


## PolicyManager > Create Customized People Flags/Submission Flags


- Choose from dozens of icons
- Each can be assigned a description
- High-level visibility

### Edit Customized People Flag

Cancel Submit

Please enter the Flag Name and choose an icon from the matrix. Editors and Publishers with RoleManager permission to 'Turn On People Flags' and 'Turn Off People Flags' can display/turn off People Flags for any person on the People Flags page. When a flag is attached to a people record, it will be displayed next to the person's name on many pages throughout the system (Editor and Publisher Roles must have permission to 'View People Flags').

**Flag Icon:** 

**Original Flag Icon:** 

**Flag Name:**  [Open Special Character Palette](#)  
Maximum 256 characters

**Hide** When you Hide a flag, the flag cannot be turned on for new people records, but will continue to display on existing people records (until it is turned off by a user with appropriate permission).

**Turn off flag throughout the system** When you turn off a flag throughout the system, the flag will be removed from all people records to which it was attached.

! ! ! ! ! ! ! ! # # # # # # # # \$ \$ \$ \$ \$ \$ \$ \$ % % % % % % % % & & & & & & & \* \* \* \* \* \* \* \*



# People and Submission Flags

Choose the criterion for selecting People Records.

[Help with Searching](#)      [Insert Special Character](#)      [Register New User](#)

Criterion	Selector	Value	User Role
People Flag Name	Is Equal To	Preferred Reviewer	ALL
Last Name	Begins With		END
Last Name	Begins With		END

Merge People	Name	City	State or Province
<input type="checkbox"/>	Charles Critic		
<input type="checkbox"/>	Chris Botti		
<input type="checkbox"/>	mary mary, M.D.	North Andover	MA
<input type="checkbox"/>	Matt Cameron		
<input type="checkbox"/>	Boom Gasper		
<input type="checkbox"/>	Jeff Christie		
<input type="checkbox"/>	Olivia Opinion		
<input type="checkbox"/>	Frank Reynolds		





# Tying Submission Flag to Custom Question

PolicyManager > Create Custom Questions

## Question text:

Do you have permission from all co-authors?

1



Yes

Associate with Flag

- Submission flags can be tied to question responses
- Configured response can be tied to flag



# Tying Submission Flag to Custom Question

Do you have permission from all co-authors?


**Answer Required:**

Please select a response

Please select a response

Yes

No



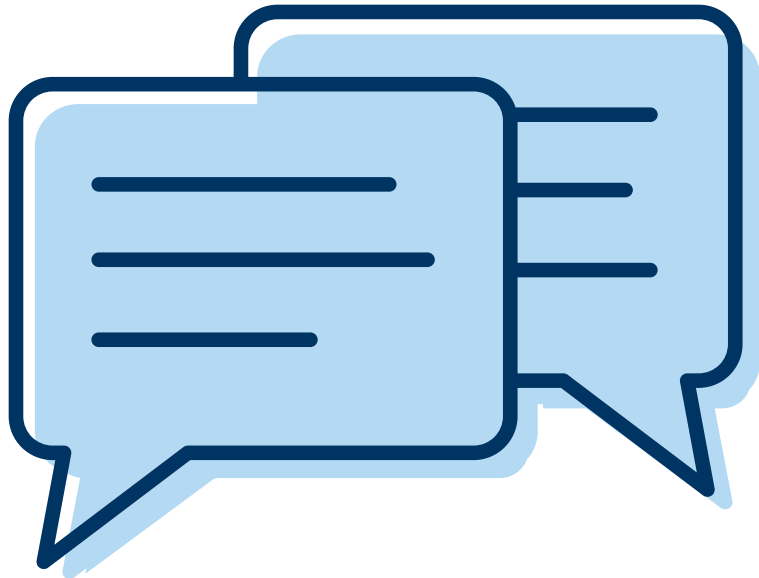
**Action**

- View Submission
- Duplicate Submission Check (70%)
- Details ▾
- Initiate Discussion
- History
- File Inventory
- Edit Submission
- Classifications
- Assign Editor
- Invite Reviewers
- Solicit Commentary
- Set Final Disposition
- Submit Editor's Decision and Comn
- Send E-mail

# Resources

- EM Help Articles
- [EM/PM Release Notes](#)
- Aries Blog/Newsletter
- Aries Video Library
  - Video Tutorial: [Customizing Letters](#)
  - Video Tutorial: [Correspondence History](#)
  - Video Tutorial: [Manuscript Flags](#)
- Your Account Coordinator
  - Site Audit – request with your AC





# Questions?

# Thank you!

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## Stay Connected

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