Publish Faster. Publish Smarter.

www.ariessys.com

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

EMUG 2023

Courtyard Boston Downtown Hotel

June 14-15, 2023

Aries systems®

EMUG 2023

Effective Communication: Letters and More

Kelsi Massicotte

Account Coordinator

Kmassicotte@ariessys.com

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Agenda

Welcome to
EMUG: Day 2

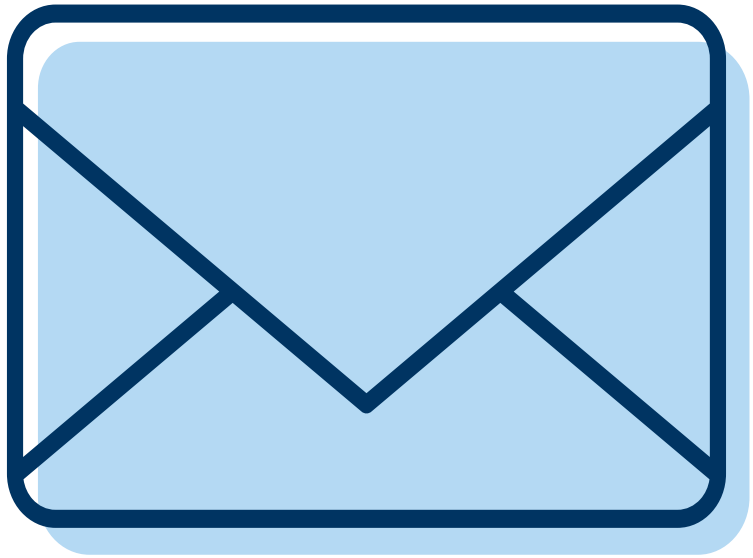
- Custom Letter Templates
- Letter Families
- Merge Fields
- Person-based Correspondence History
- Drop-box Configuration
- Co-Author Verification Status
- People and Submission Flags
- Resources
- Questions from Attendees

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.



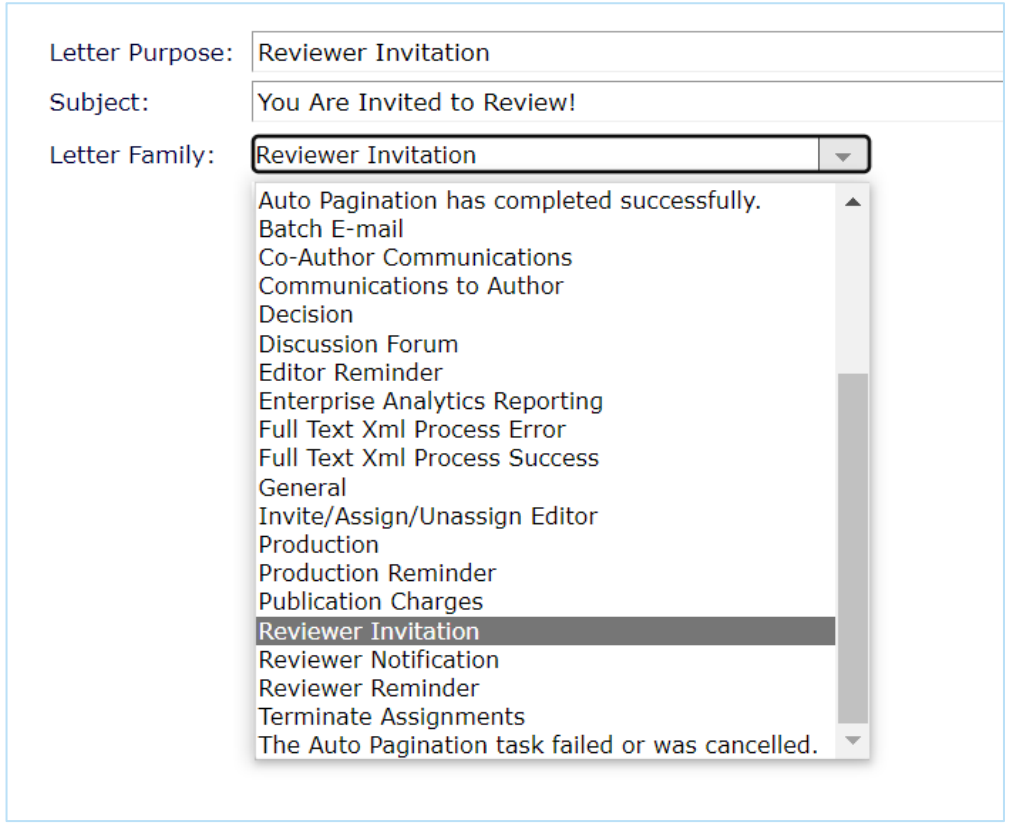
Letter Families

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

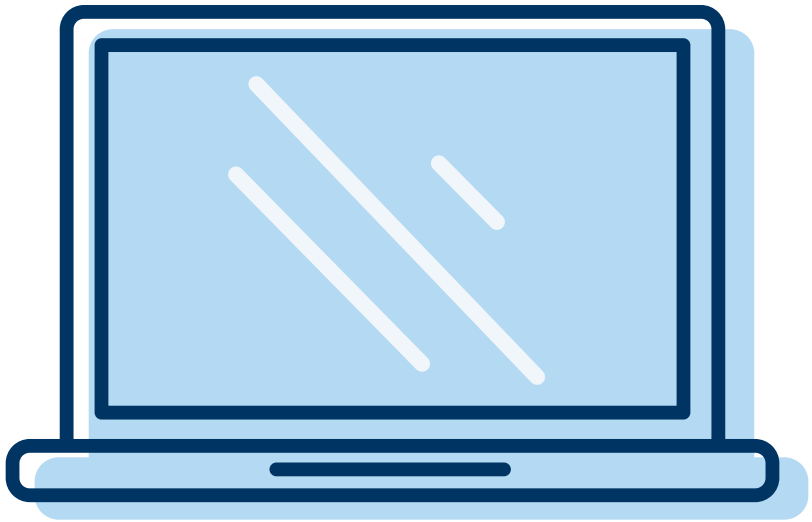
Letter Families

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



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.



Custom Letter Templates

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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 S symbol. (more...)

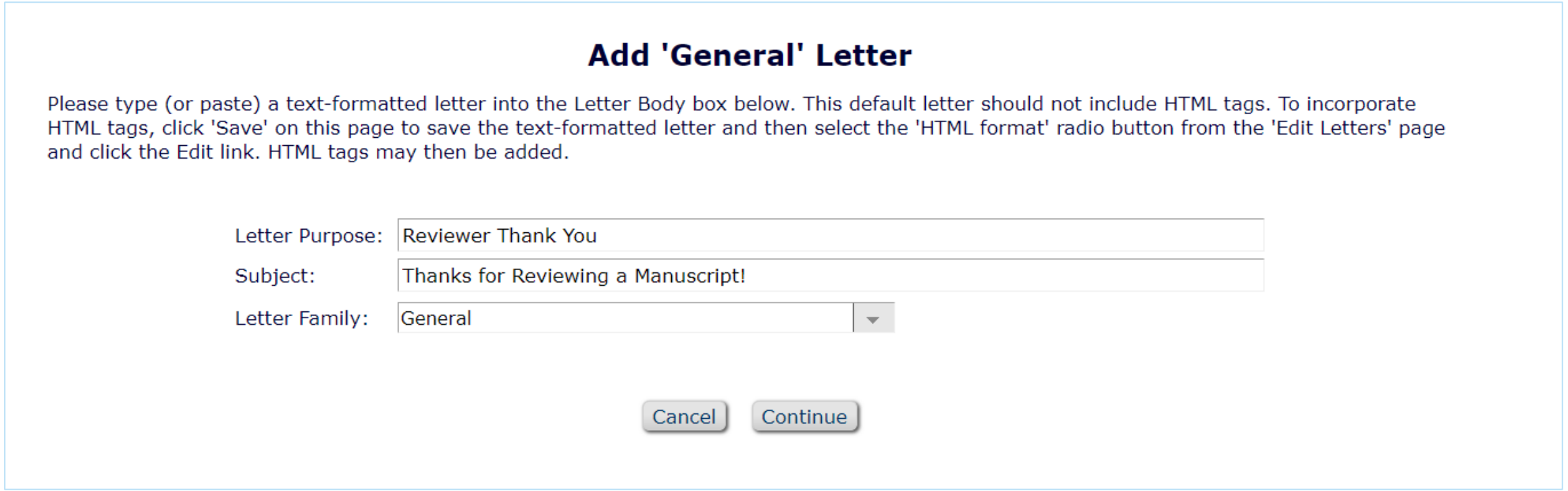
Back to PolicyManager

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		Letter Format: Rich Text (HTML)		All Formats
☐	Author - Other Author Verification	General	Author - Notify Other Authors	◉	Edit	○	Edit	Remove | Hide
☐	Author - Other Author Verification Reminder	Author Reminder		◉	Edit	○	Edit	Remove | Hide
☐	Author Approve Changes	General		◉	Edit	○	Edit	Remove | Hide
☐	Author Changed Invited Due Date Confirmation	General	Author - Invited Submission Due Date Changed	◉	Edit	○	Edit	Remove | Hide
☐	Author Instructions and Due Date	General	Author - Author Agrees to Invitation	◉	Edit	○	Edit	Remove | Hide
☐	Author Invitation for Commentary	Author Invitation	Author - Solicit Commentary on Submission	◉	Edit	○	Edit	Remove | Hide

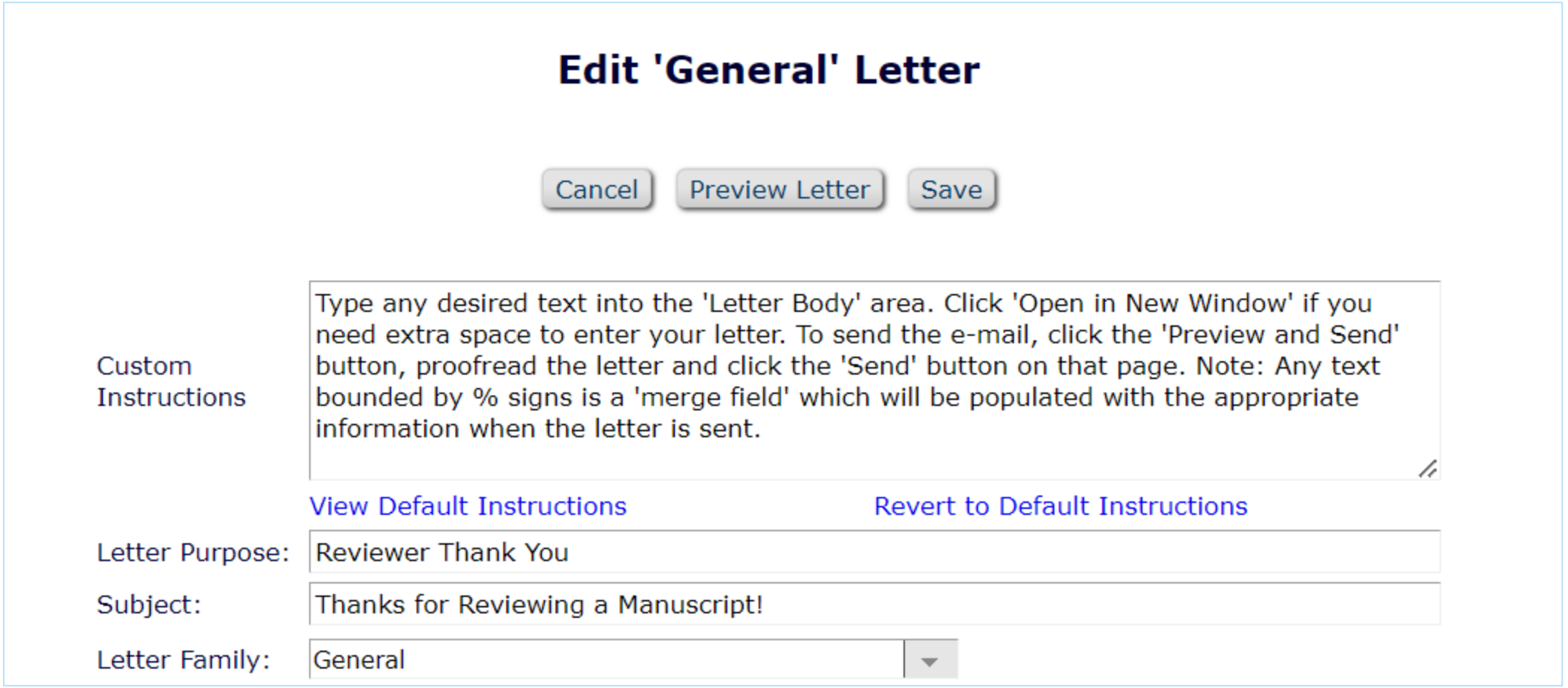
This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

New Letter Template: Purpose & Family



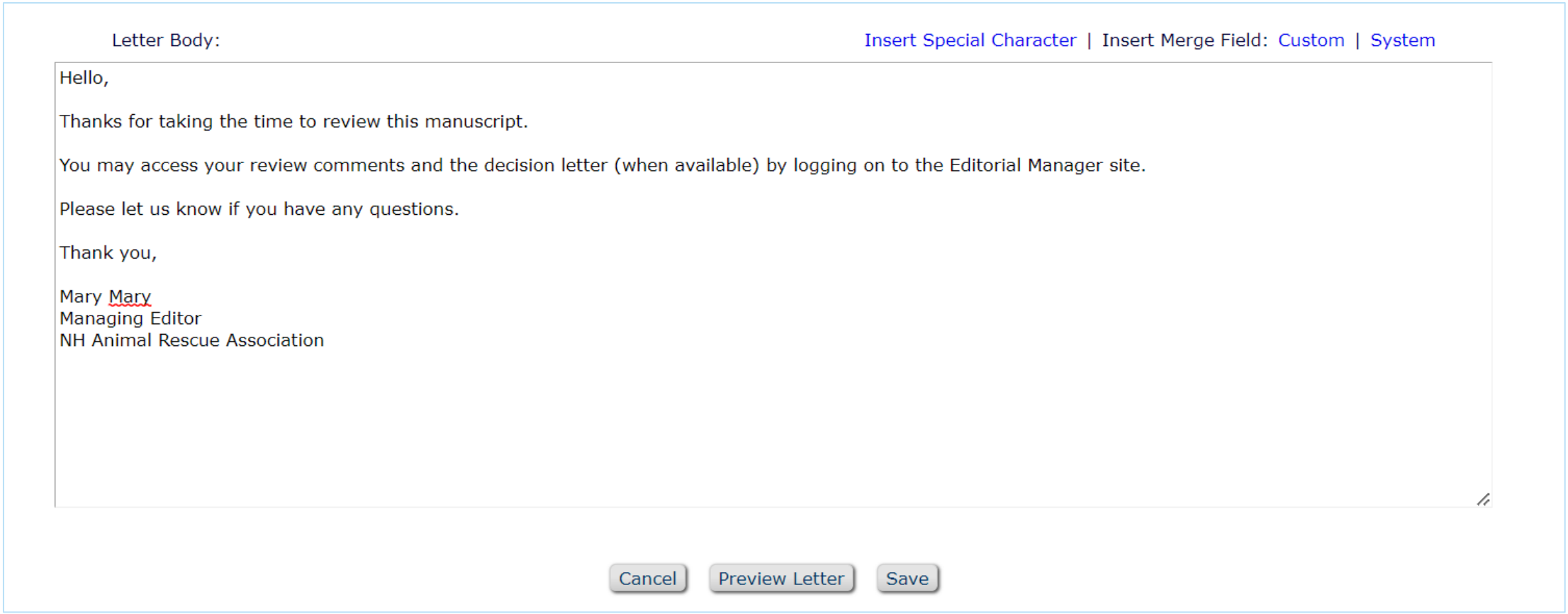
This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

New Letter Template: Instructions

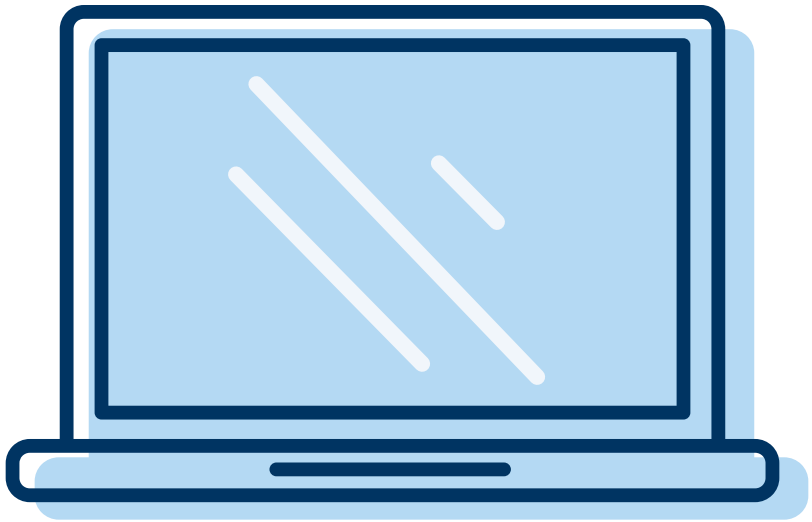


This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

New Letter Template: Drafting Message Body



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

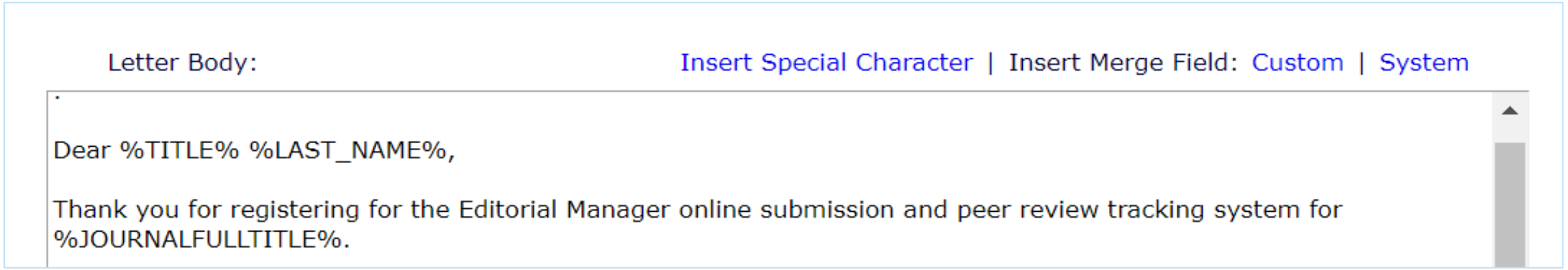


%MERGE_FIELDS%

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

System Merge Fields

PolicyManager > Edit Letters

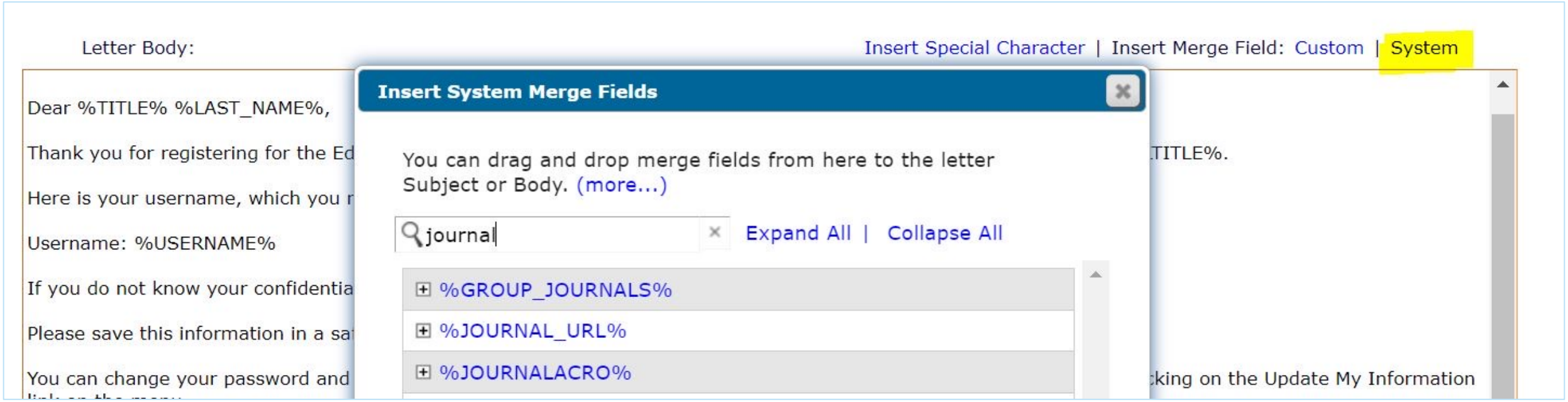


- Automatically pull in specific information
- Avoid editing errors (title, name, ms number, etc.)
- Insert merge field into letter template

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

System Merge Fields

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



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

System Merge Fields: Populated Letter

Dear Dr. Wasiewski,

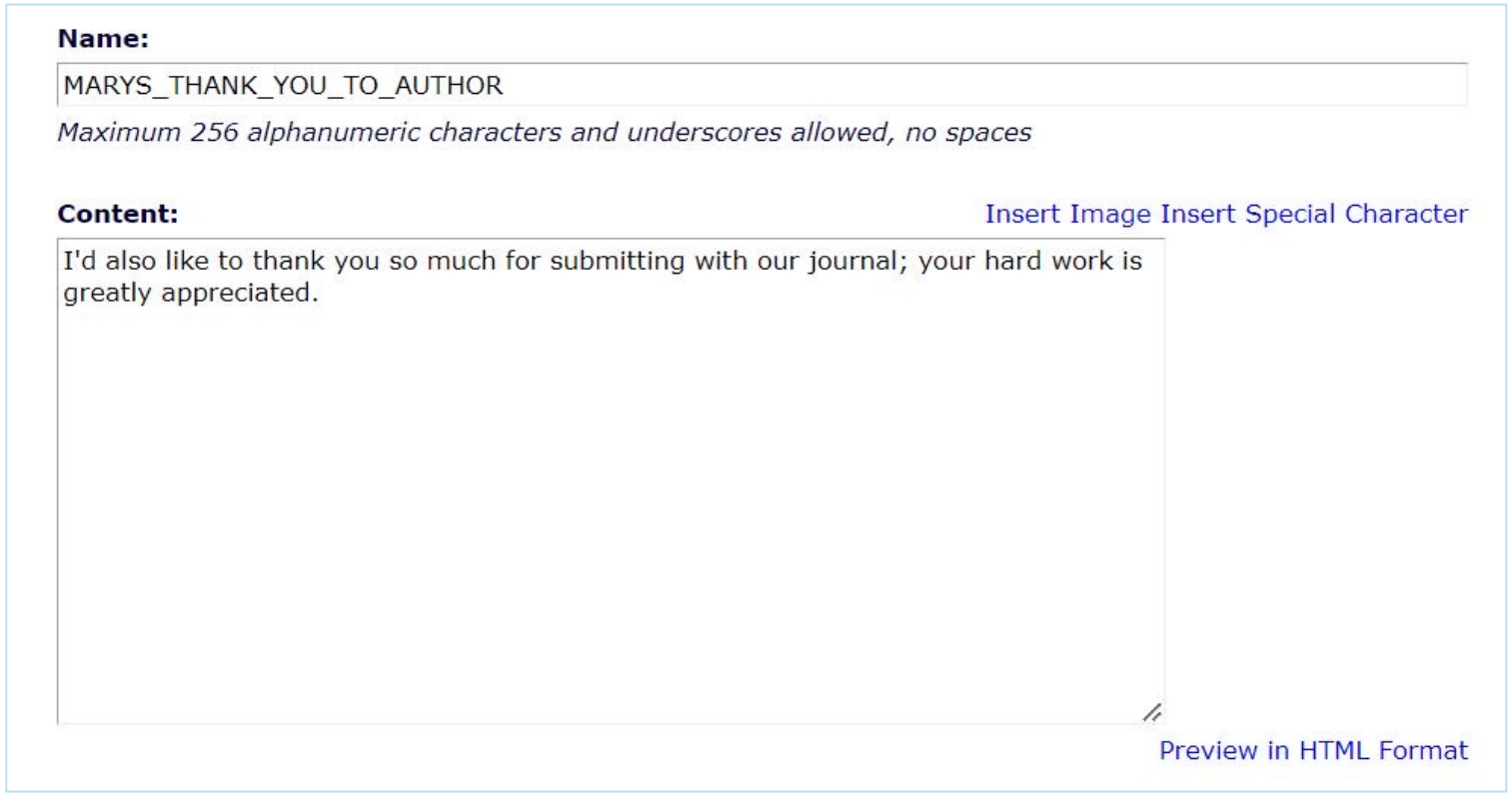
Thank you for registering for the Editorial Manager online submission and peer review tracking system for DEMO KM Site (CS Site).

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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Custom Merge Field

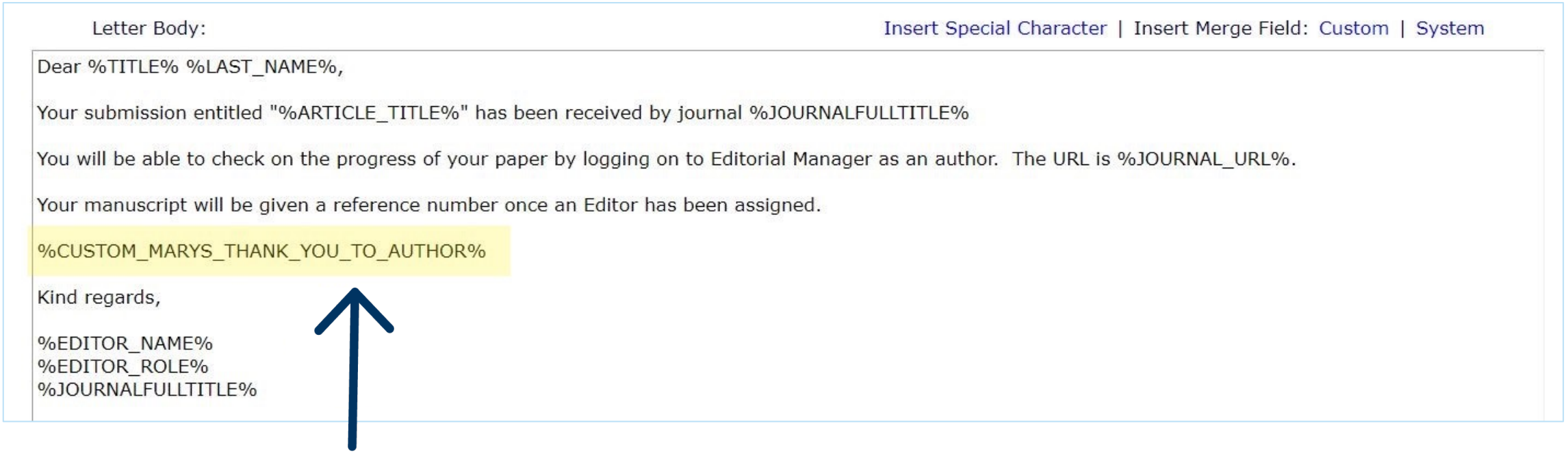
PolicyManager> Define Custom Merge Fields



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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Custom Merge Fields



Users can insert a custom merge field into a letter template

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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.

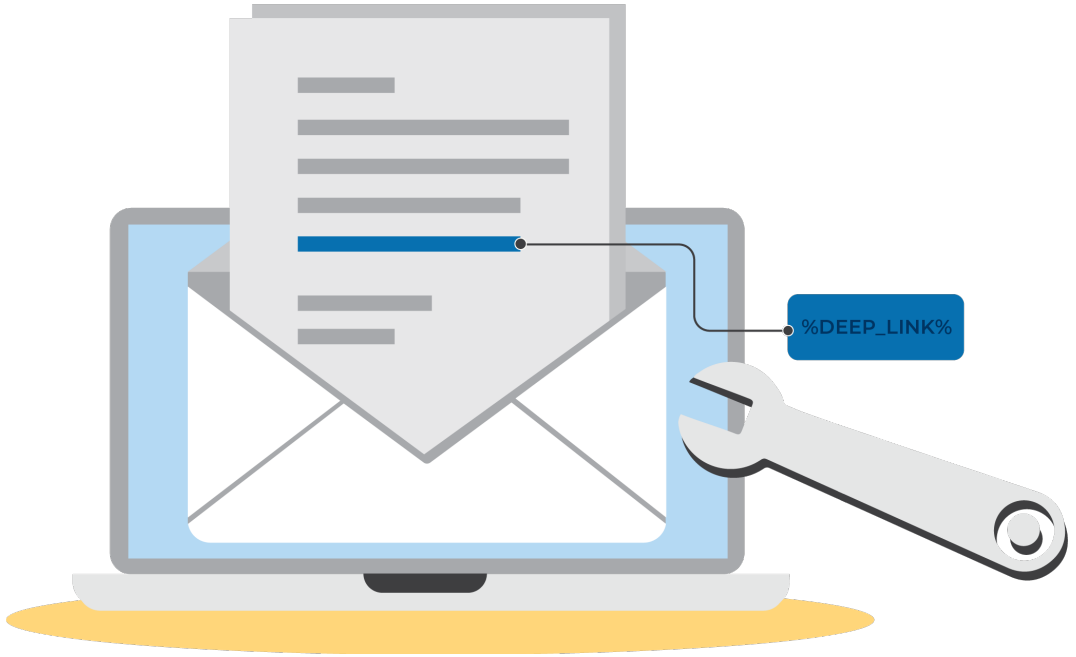
Kind regards,

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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’



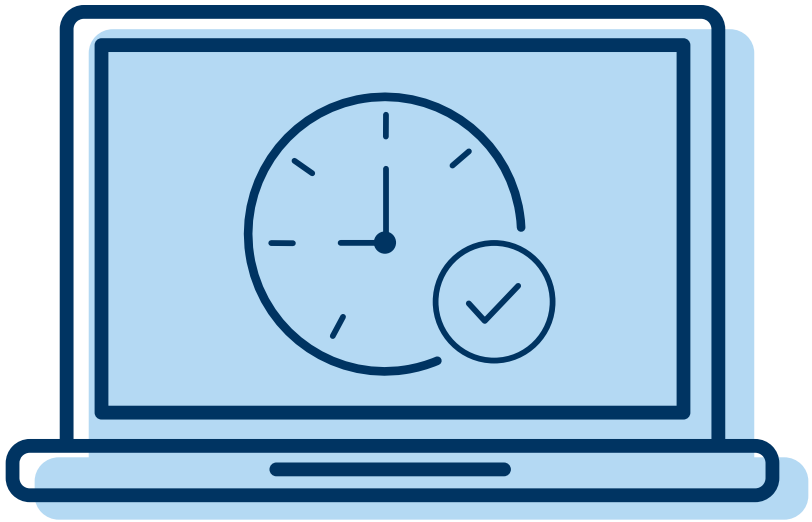
This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.



Correspondence History

People-based records

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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

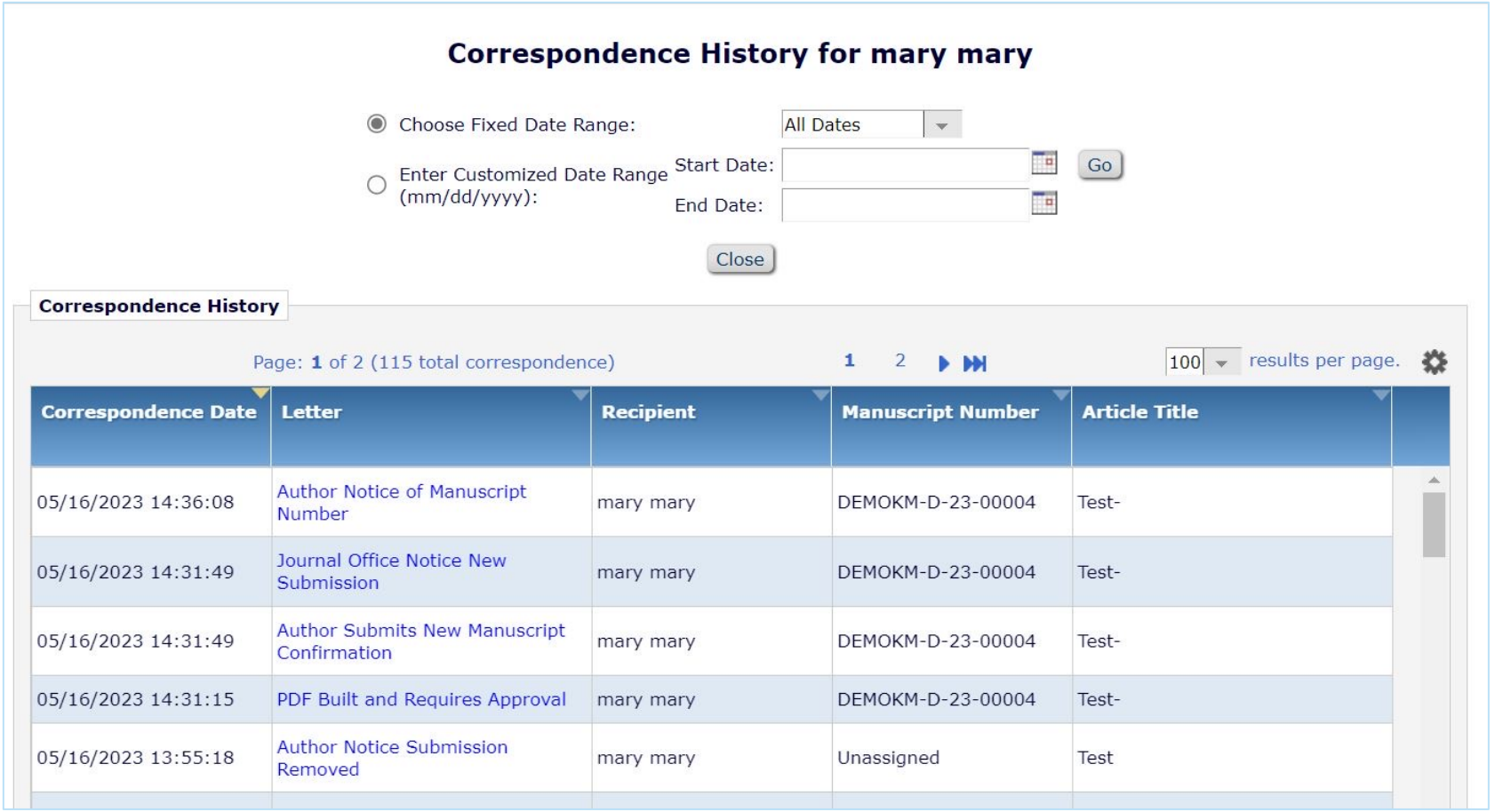
Page: **1** of 1 (8 total correspondence) 1 100 resu

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		

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

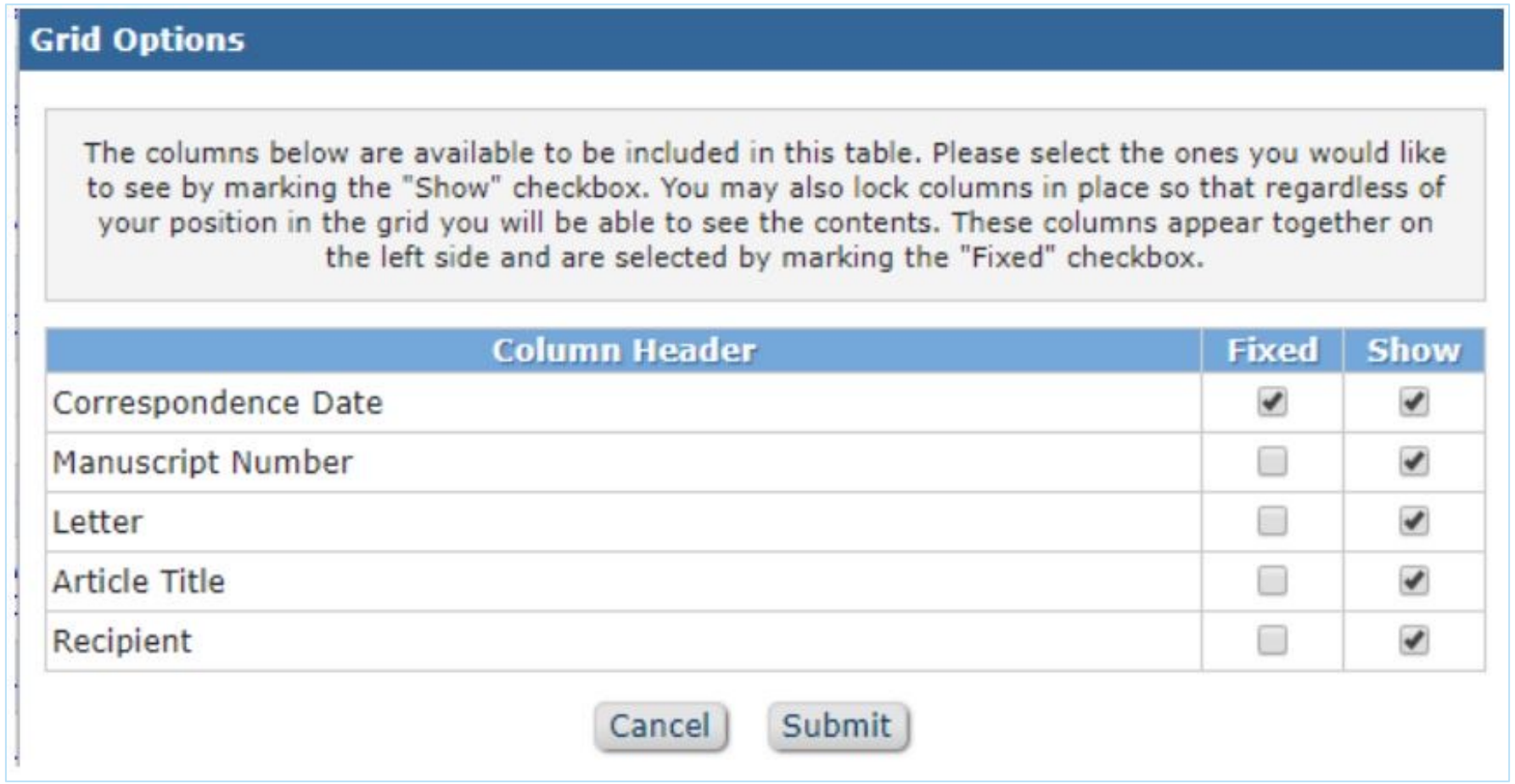
Correspondence History: Customization

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



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Correspondence History: Customization

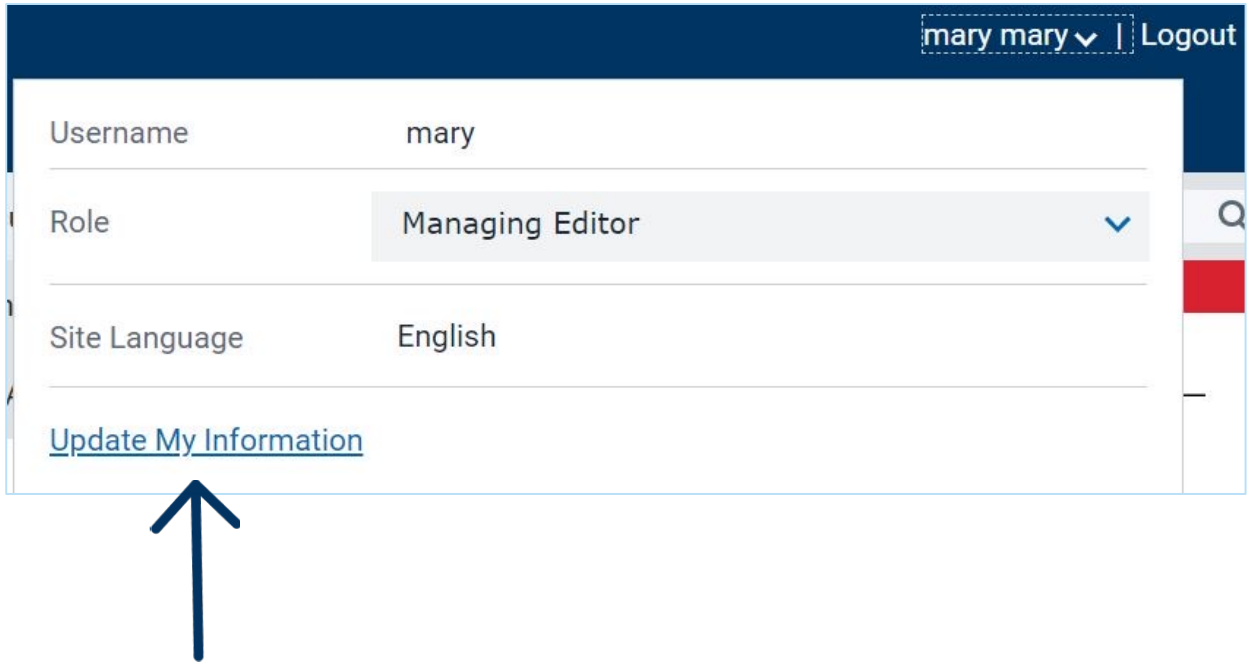


Same ‘fix/show’ functionality as a Submission Search

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Correspondence History: Viewing Your History

- "Update My Information" link
- No permissions required



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

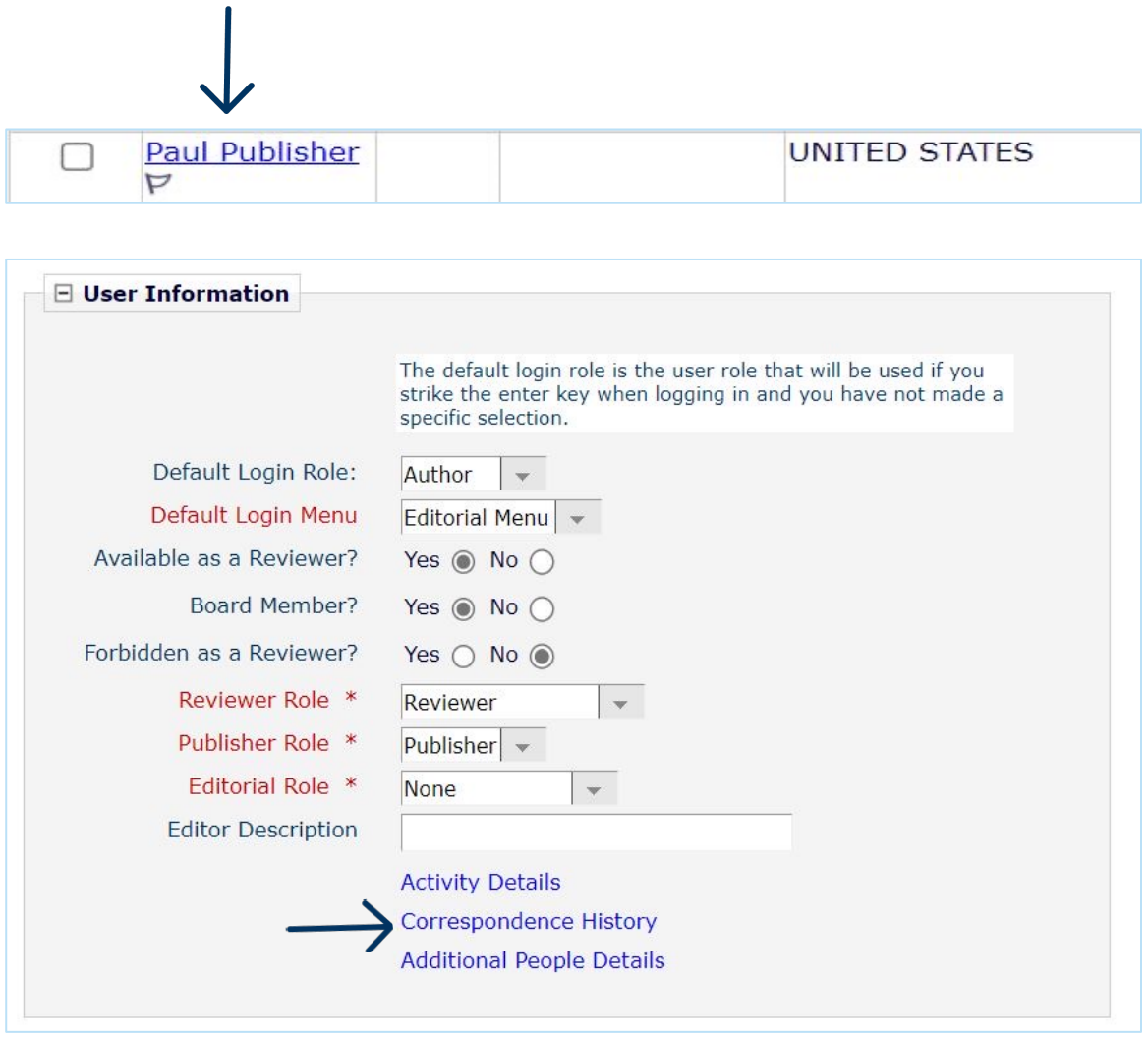
Correspondence History: Viewing Others'

- 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
☐	Talia Test			UNITED STATES	[Author]	[Reviewer]			Correspondence History
☐	Mina Sullivan			UNITED STATES	[Author]	[Reviewer]			Correspondence History
☐	Sally Solicitor			UNITED STATES	[Author]	[Scientific Reviewer]			Correspondence History
☐	Mina Rowe			UNITED STATES	[Author]	[Reviewer]			Correspondence History
☐	Bob Ross			UNITED STATES	[Author]	[Reviewer]			Correspondence History
☐	Robert Reviewer			UNITED STATES	[Author]	[Reviewer]			Correspondence History
☐	Richard Reviewer			UNITED STATES	[Author]	[Reviewer]			Correspondence History
☐	Remy Referee			UNITED STATES	[Author]	[Reviewer]	[Editor in Chief]		Correspondence History
☐	Paul Publisher			UNITED STATES	[Author]	[Reviewer]		[Publisher]	Correspondence History

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

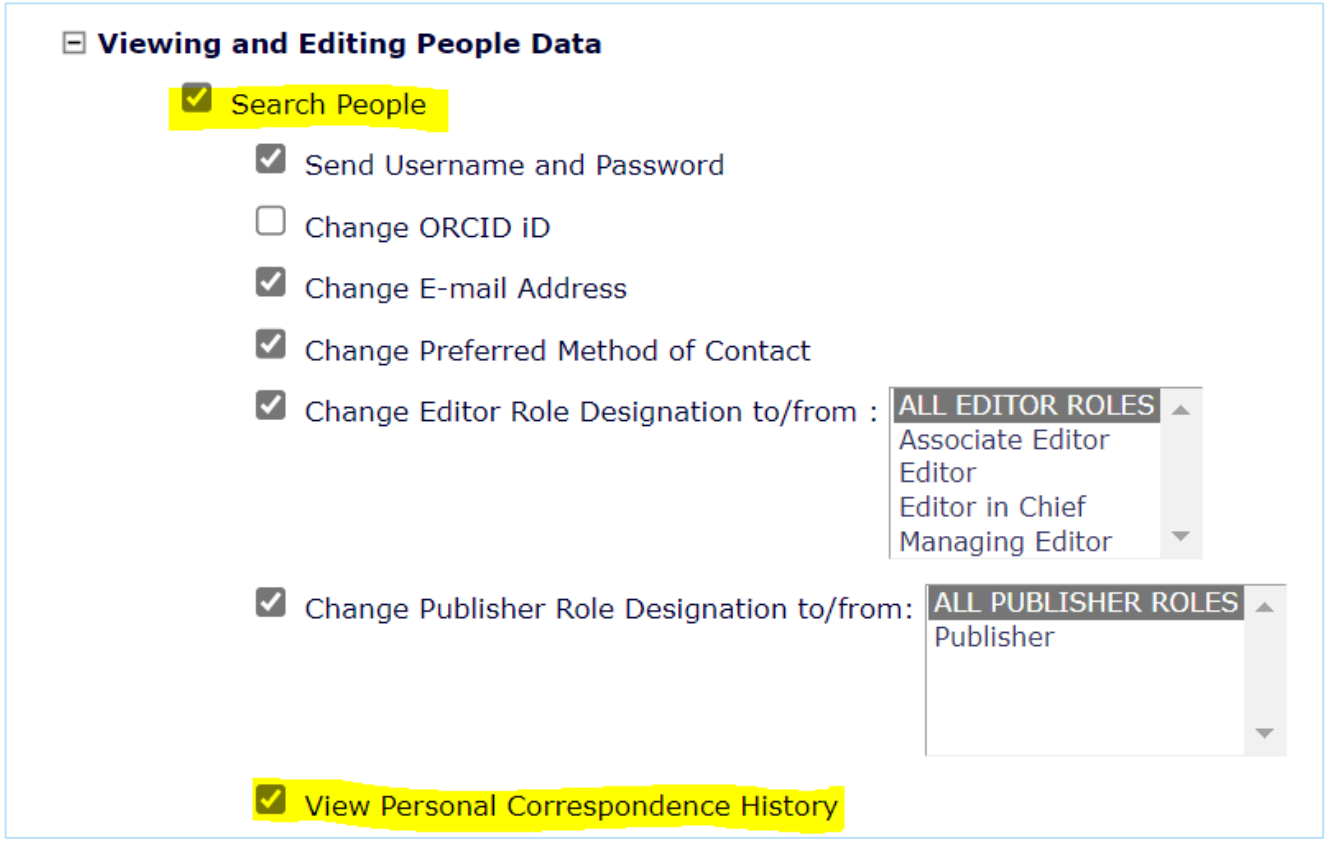
Correspondence History: Viewing Others'

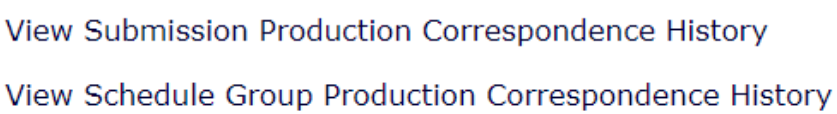


- Find via user's People Record

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Correspondence History: Permissions



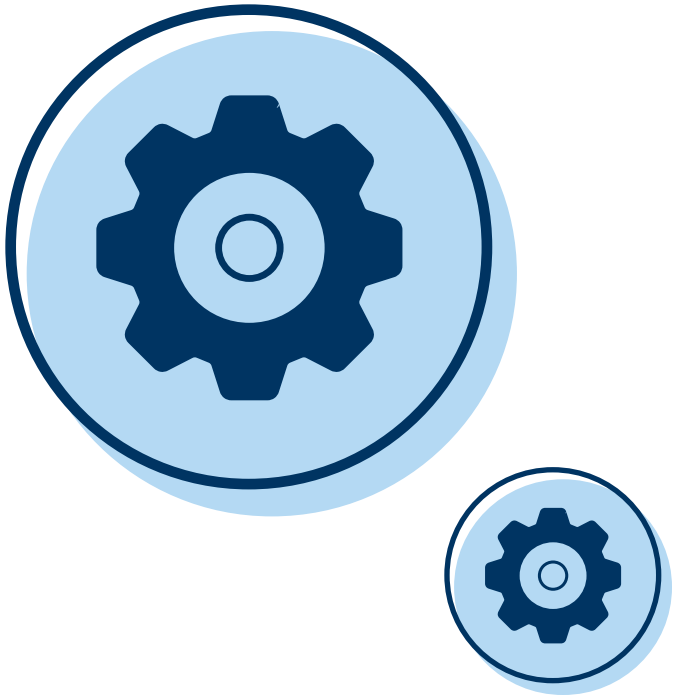


This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.



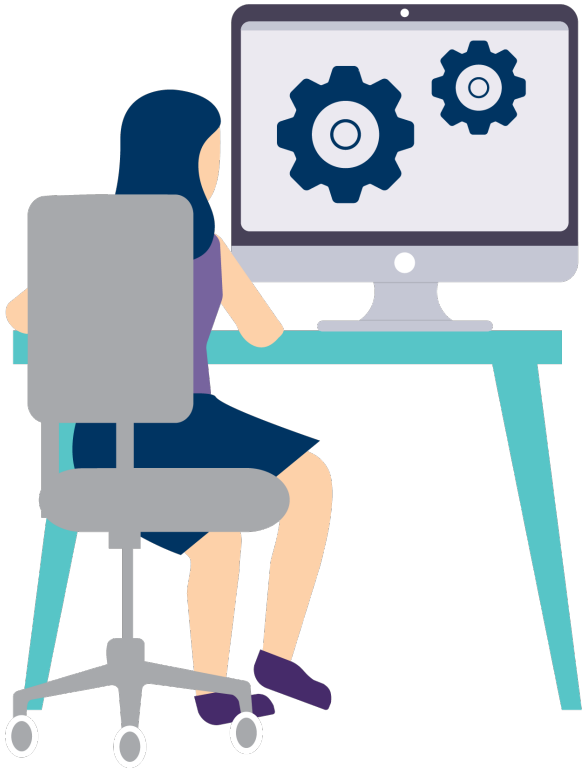
Drop-box Configuration

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Drop-Box Configuration

PolicyManager > Configure Email Import

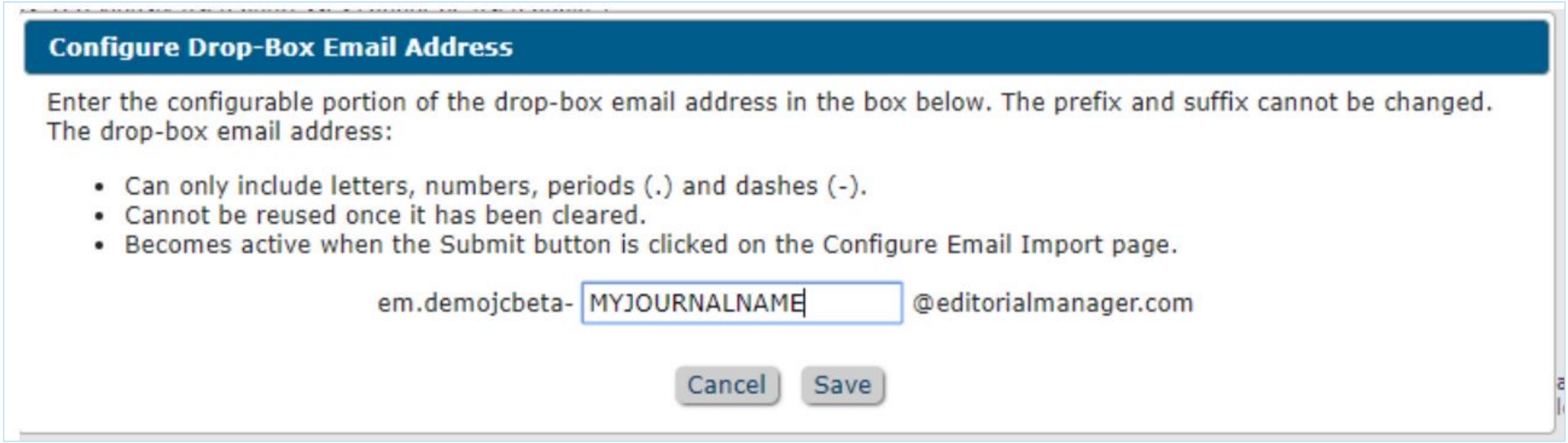
- Users have the option to generate a ‘Drop-box’ email address or create a unique one
- External correspondence (reply to system email) can be forwarded here
- Ideal for Editors who work with multiple EM sites



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Drop-Box Configuration

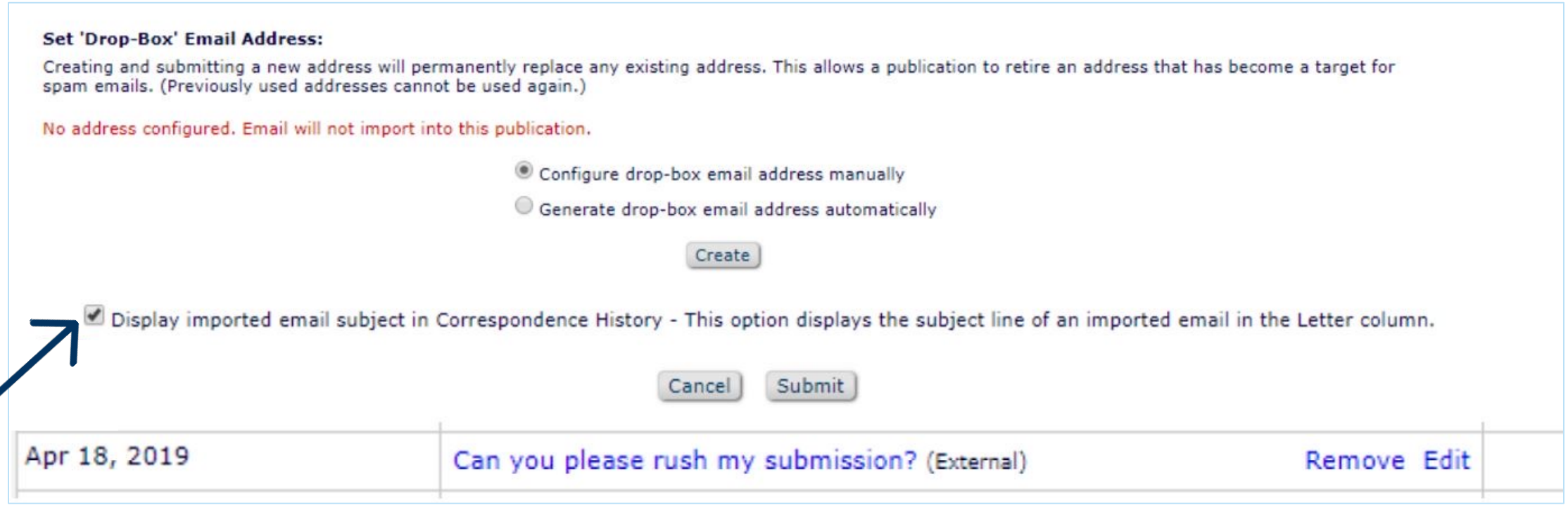
Personalized drop-box email address



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

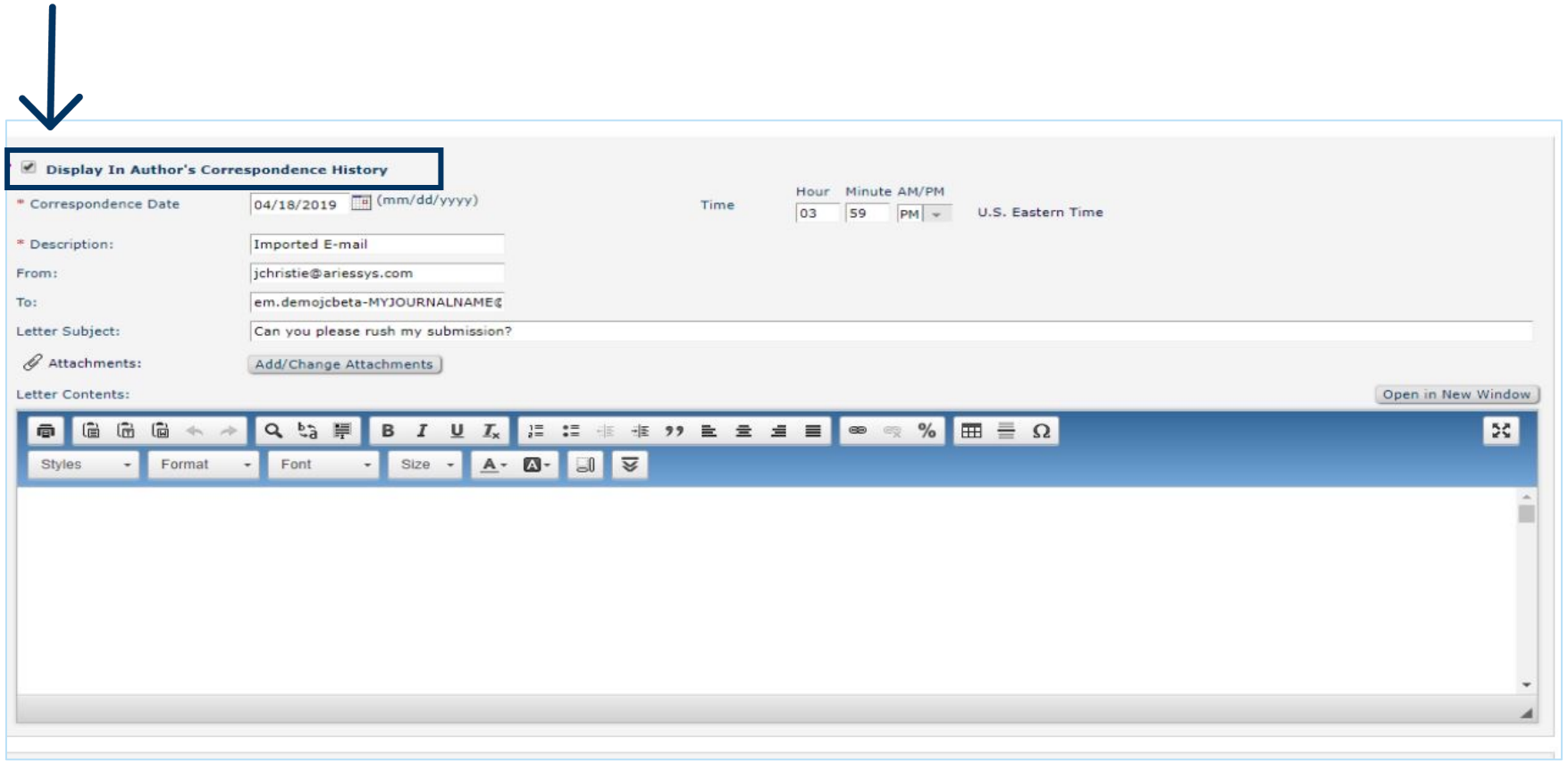
Drop-Box Configuration

Check the box to display to display in history



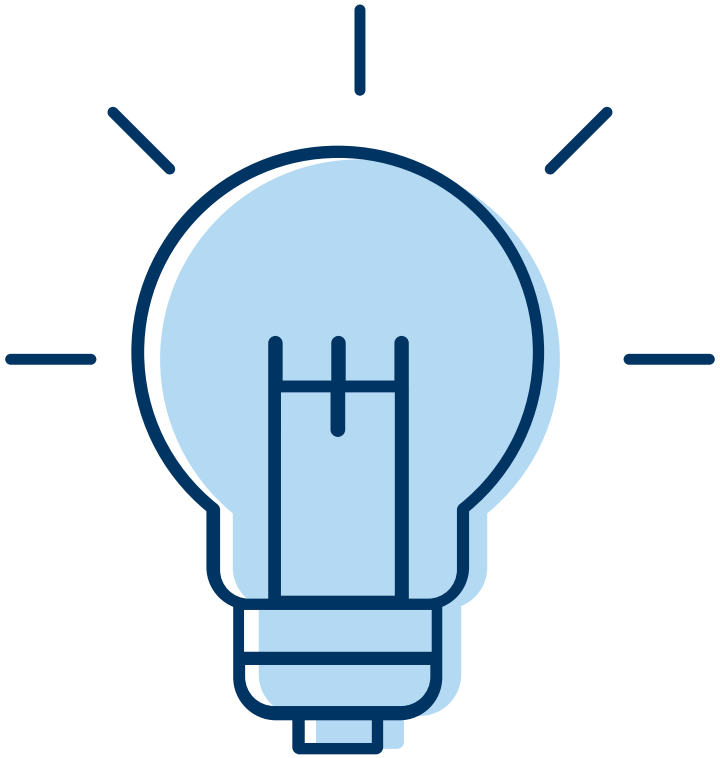
This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Drop-Box Configuration



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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.



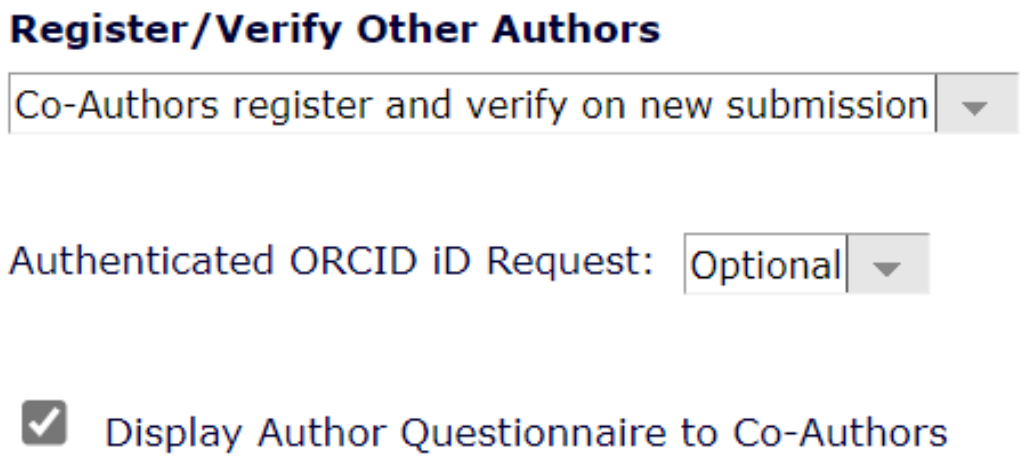
Co-Author Verification Status

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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

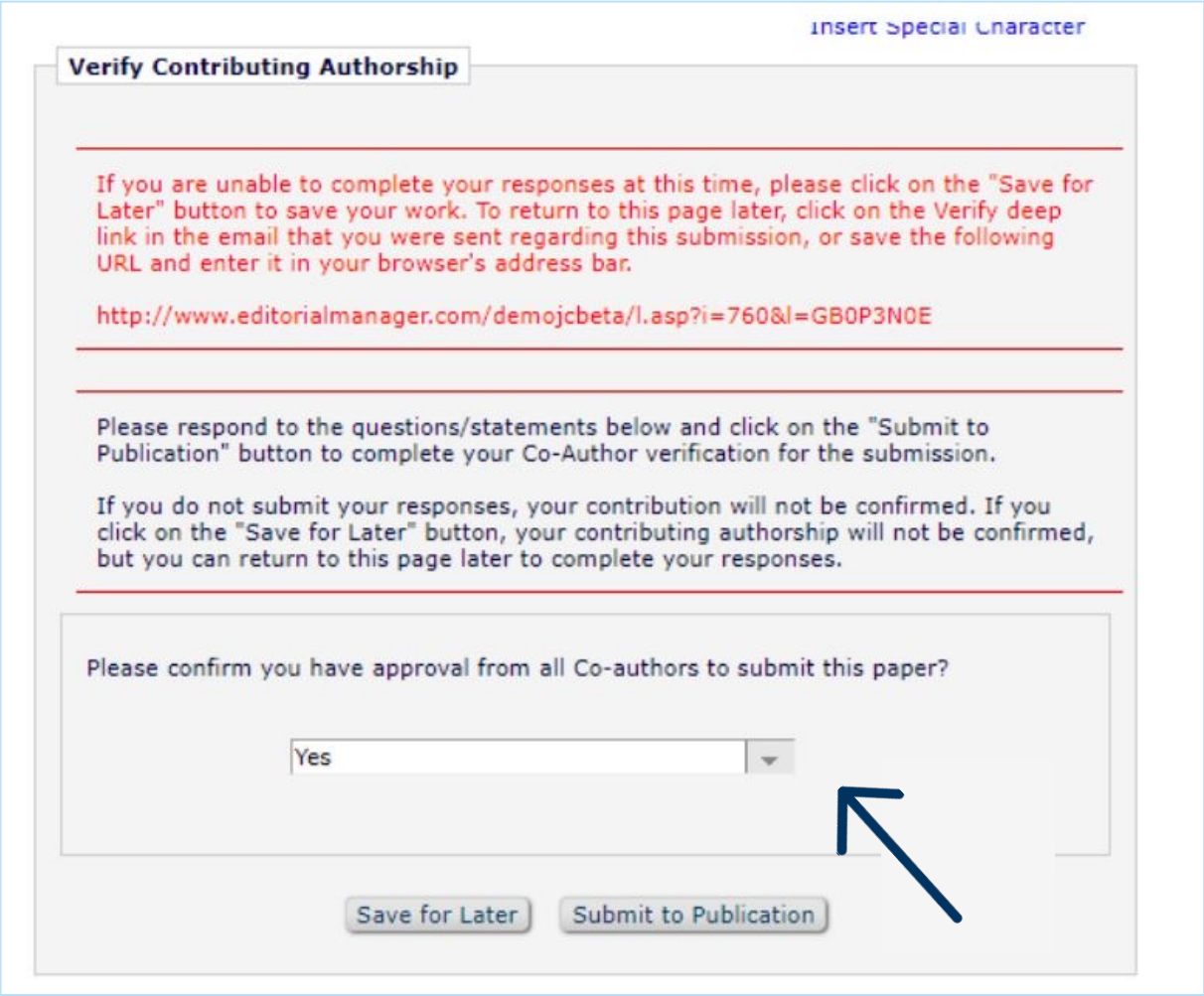
No, I am not affiliated: https://www.editorialmanager.com/demojcbeta/l.asp?i=704&l=A8HIMMBN

Thank you,

DEMO JC Beta Site (CS Site)

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Co-Author Verification Status



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

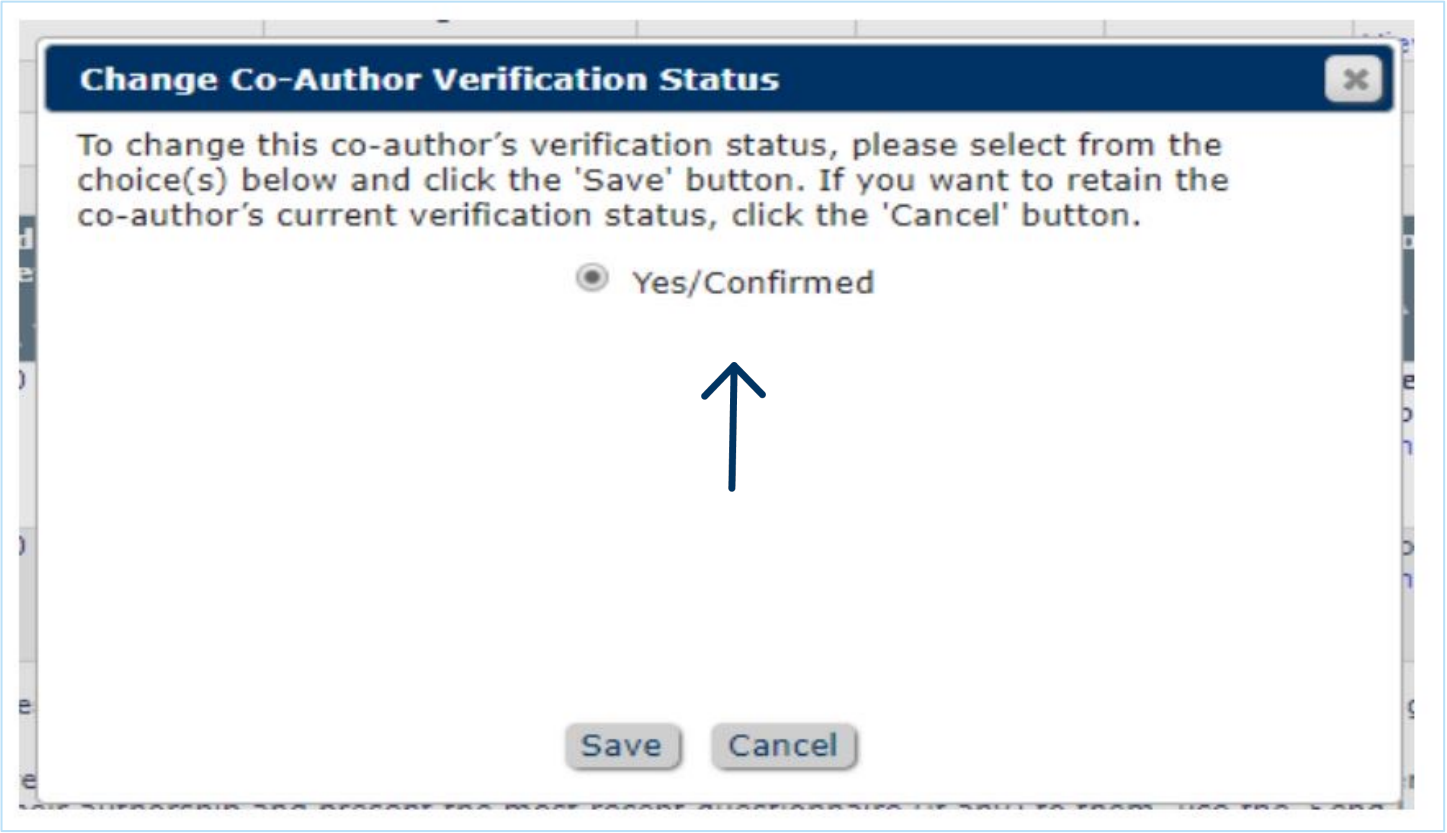
This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Co-Author Verification Status

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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Co-Author Verification Status

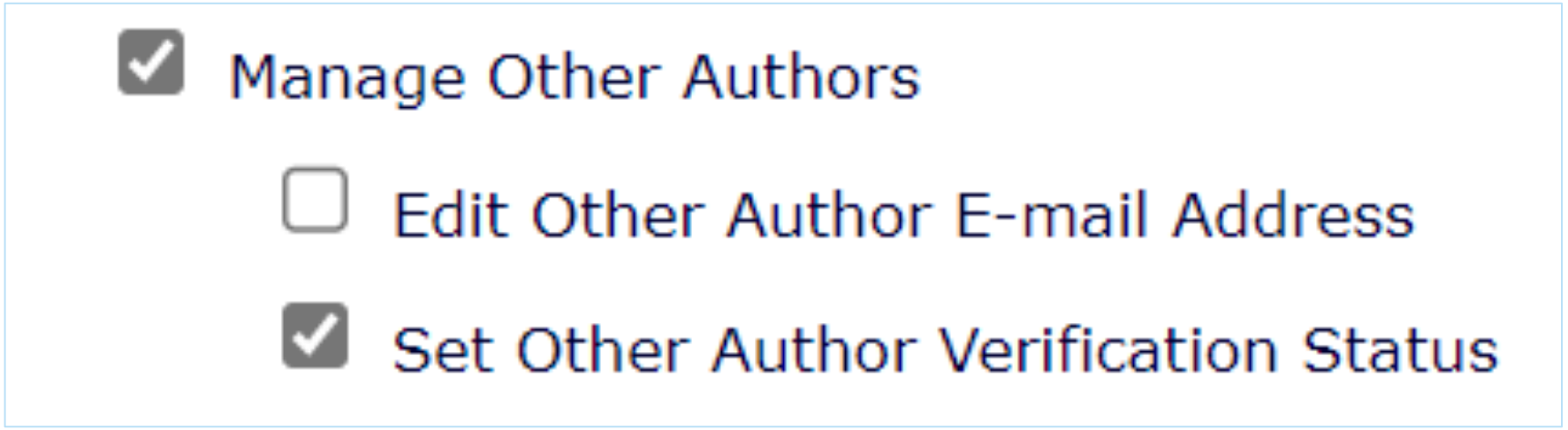


- Available options not chosen by the co-Author can be selected
- Editors cannot answer co-Author questionnaires on their behalf (if configured)

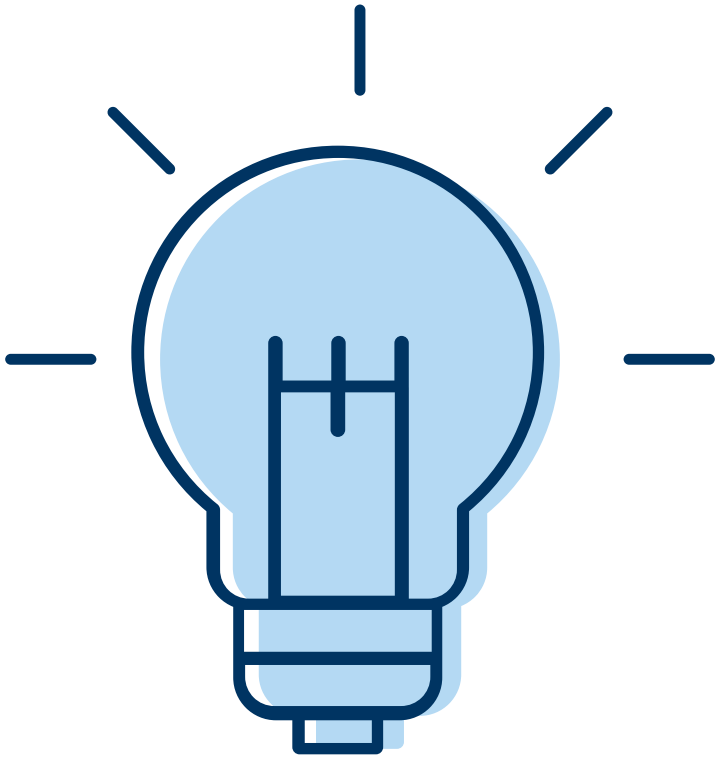
This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Co-Author Verification Status

RoleManager sub-permission for Editors



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

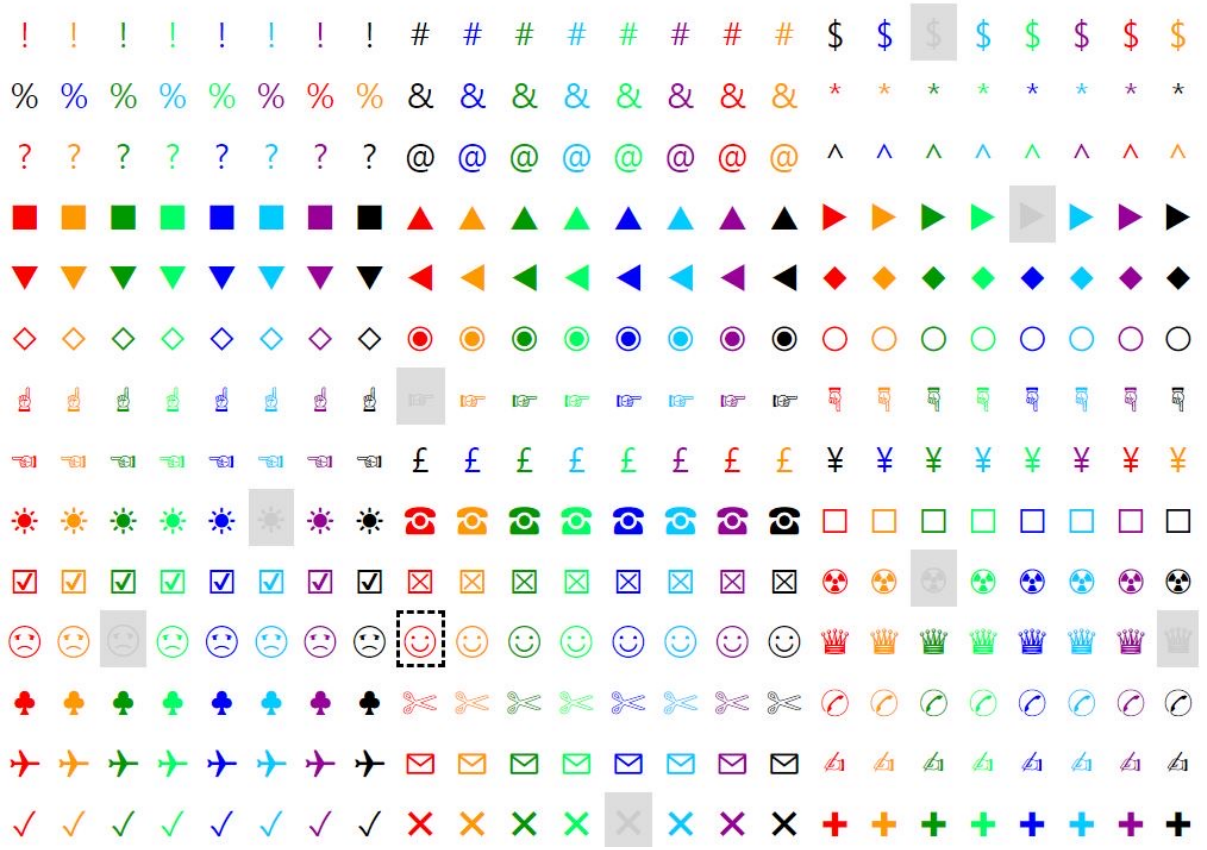


People and Submission Flags

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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!



This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Submission Flag Use Cases

- People Flags
  - Preferred Reviewer
  - Reviewer Unavailable
  - Permission required to review
  - Conference Editor

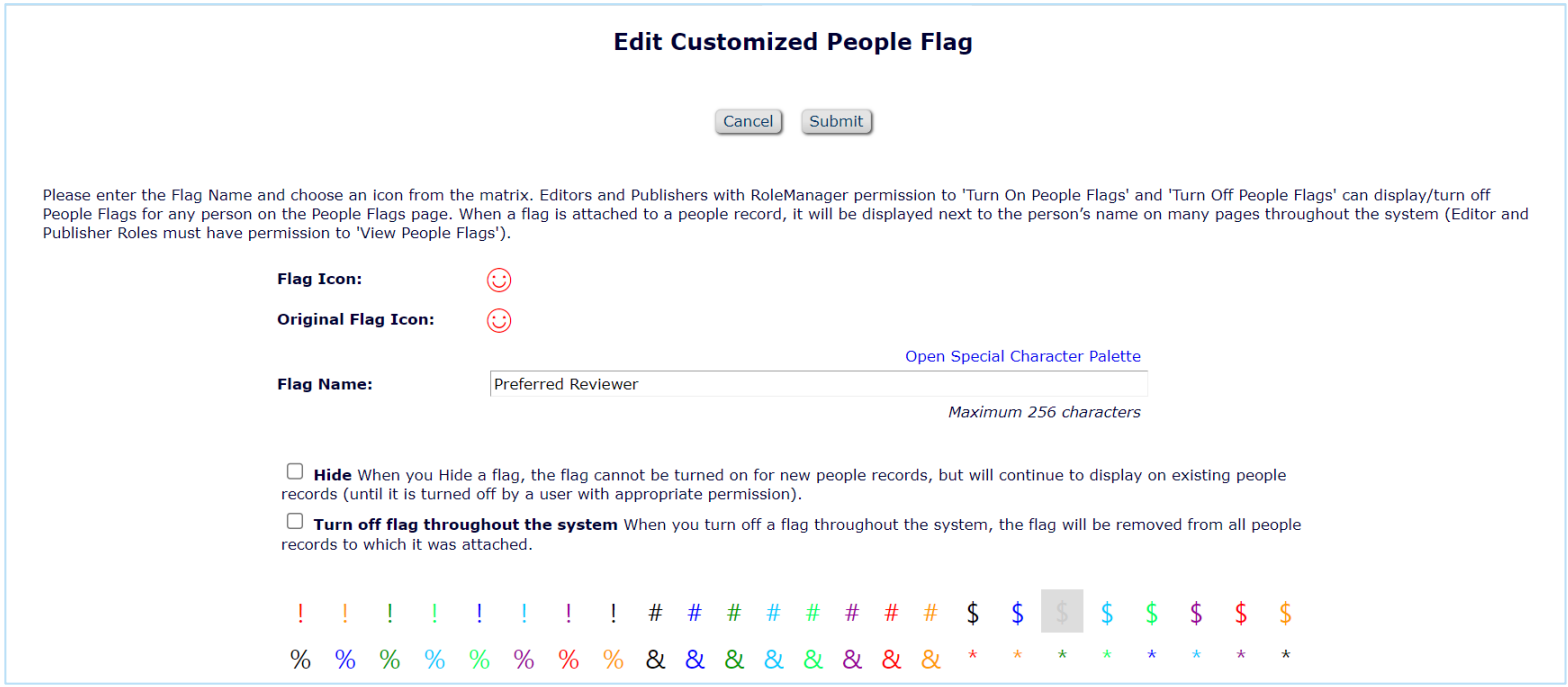
- Submission Flags
  - Submission Fee Paid
  - Reviewer 1's Attachment Blinded
  - Missing Title Page
  - Missing Copyright Information

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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



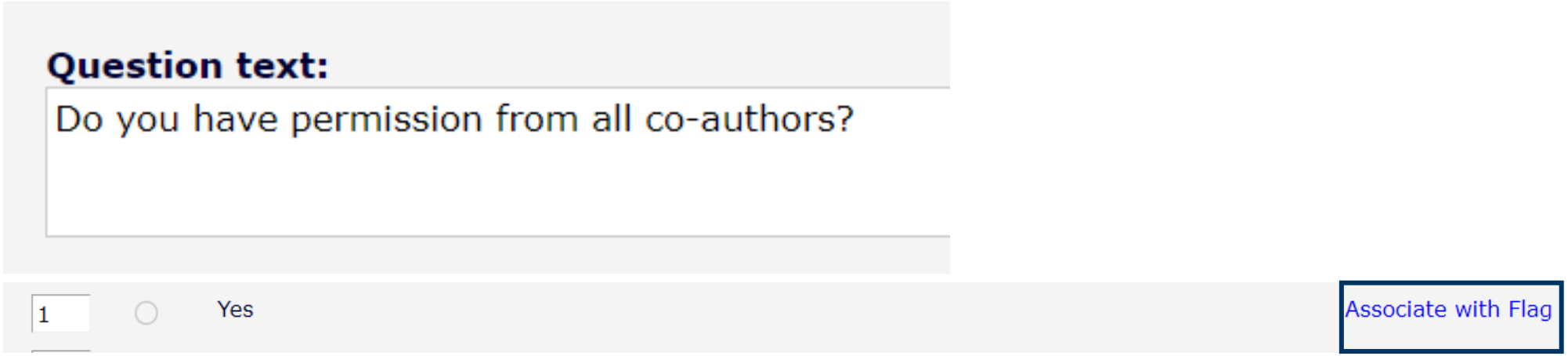
This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

People and Submission Flags

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Tying Submission Flag to Custom Question

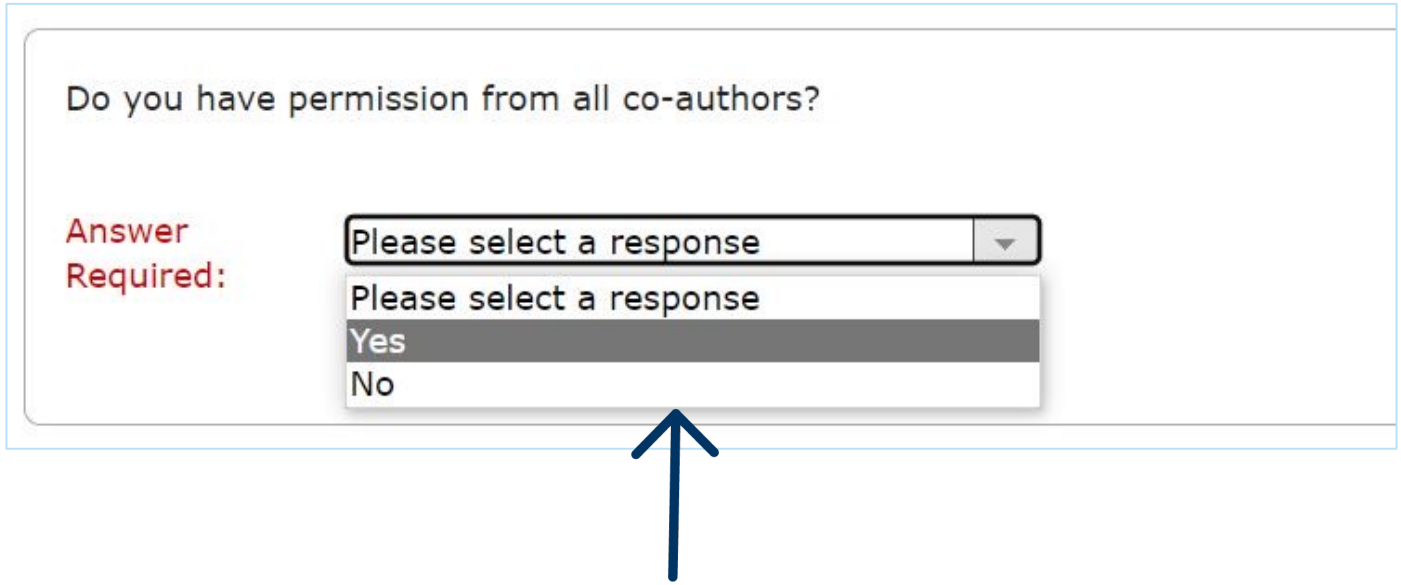
PolicyManager > Create Custom Questions

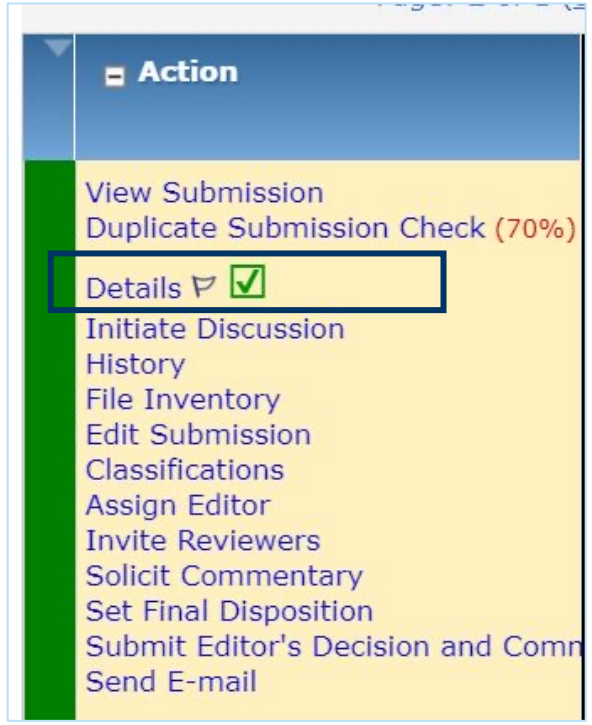


- Submission flags can be tied to question responses
- Configured response can be tied to flag

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Tying Submission Flag to Custom Question



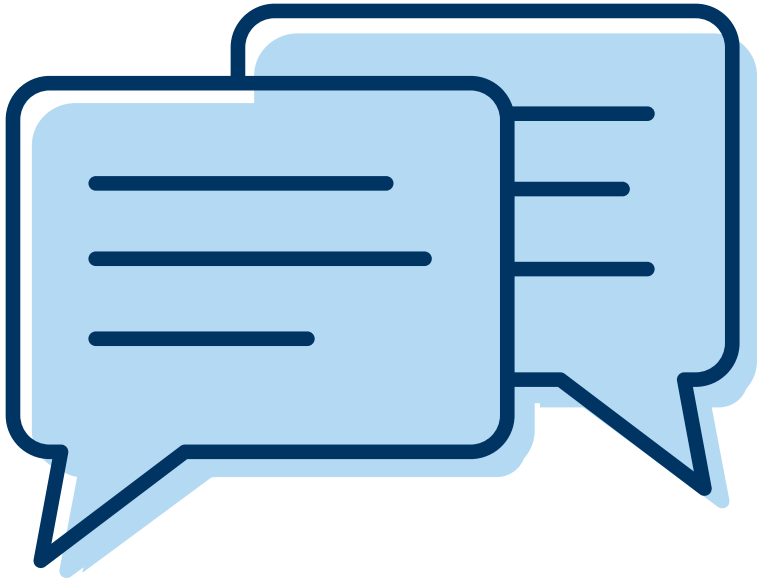


This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

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

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.



Questions?

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

Thank you!

Stay Connected

Kelsi Massicotte

Account Coordinator

Kmassicotte@ariessys.com

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

50 High Street, Suite 21

North Andover, MA 01845 USA

www.ariessys.com

This material contains information that is proprietary and confidential to Aries Systems. It cannot be shared with third parties without Aries Systems' consent. ARIES SYSTEMS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.