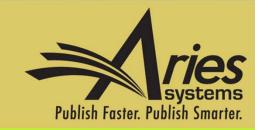
# Welcome to EMUG 2015







# The Joy of Letters Steven Gain – Account Coordinator

# Agenda

- Letter Configuration
  - Letter Options
  - Letter Content Options
  - HTML in Letters
- Managing External Correspondence
- Ad Hoc Letter Features
- Attach Files to Letters
  - Decision Letters
- Edit and Resend E-mail
- Upcoming Features

Letters = Communication

Edit Letters (PolicyManager)

#### **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	<ul><li>Edit</li></ul>	Edit	Remove   Hide
Editor Agrees to Handle Assignment	General	<ul><li>Edit</li></ul>	Edit	Remove   Hide
Journal Office Notice Editor Decision Rescinded	General	<ul><li>Edit</li></ul>	Edit	Remove   Hide
Journal Office Notice Declined Revision Reinstated	General	<ul><li>Edit</li></ul>	Edit	Remove   Hide
Journal Office Notice All Reviews Complete	General	<ul><li>Edit</li></ul>	Edit	Remove   Hide
Journal Office Notice Author Declines to Revise	General	<ul><li>Edit</li></ul>	Edit	Remove   Hide
Journal Office Notice Completed Review	General	<ul><li>Edit</li></ul>	Edit	Remove   Hide
Journal Office Notice of Proxy Registration	General	Edit	Edit	Remove   Hide
Journal Office Notice of Review Assignment	General	<ul><li>Edit</li></ul>	Edit	Remove   Hide
Journal Office Notice Revised Submission	General	<ul><li>Edit</li></ul>	Edit	Remove   Hide

- Sort by Letter Purpose or Letter Family
- Remove or Hide templates

Warning! The letter 'Journal Office Notice Editor Decision Notification' is associated with ActionManager events. Please go to ActionManager and select another letter to be sent for the following event(s):

Editor Decision

If you wish to continue to hide this letter, select the 'Hide' button and the letter will continue to be used by the ActionManager events until a new selection is made. Select 'Cancel' to return to the Edit Letters page.





 Hidden templates are placed at bottom of list

	Enterprise Analytics Reporting	•	Edit	0	Edit	Remove   Hide		
Author - Other Author Verification	Co-Author Communications	•	Edit	0	Edit	Remove   Hide		
	Hidden Letters				3			
Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	ext l	Format	нтмі	. Format	All Formats		
Terminate Assignment	Terminate Assignments	•	Edit	0	Edit	Remove   Restore		
Proposal Ad Hoc	Ad Hoc For Proposal	•	Edit	0	Edit	Remove   Restore		

Letter Families

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

# Letter Configurations Letter Options

- 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

## **Letter Options**

Letter Purpose:	General Email to Author						
Subject:	Email to Author						
Letter Family:	Ad Hoc From Editor ▼						
Editor Roles That Can Send This Letter	None Selected Select All ALL EDITOR ROLES Editor in Chief Associate Editor Editorial Coordinator   Select All Clear All						
Sender's E- mail Address	<ul> <li>Use E-mail address of user triggering the Correspondence</li> <li>"12.0 Demo" <demo@ariesys.com></demo@ariesys.com></li> <li>"12.0 Demo" <demo@ariesys.com></demo@ariesys.com></li> </ul>						
Recipient:	□ "12.0 Demo" demo@ariesys.com □ 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)						
	<ul> <li>□ First Assigned Editor</li> <li>□ Handling Editor</li> <li>□ Editor who made the first Editor assignment</li> <li>□ All Reviewers of the current revision of the submission</li> <li>□ Display all Reviewers of the current revision so sender can select recipient(s)</li> <li>✔ Corresponding Author</li> </ul>						

## **Letter Options**

#### **Additional Recipients**

- Recipients of a cc: copy will be revealed to and able to see the sender, the primary recipient(s) and any cc: recipients
- Recipients of a bcc: copy will not be revealed to any other recipients, but will be revealed to the sender and able to see the sender, the primary recipient(s) and any cc: recipients

sender a	and able to see the sender, the primary recipient(s) and any cc: recipients
Automatically	cc: bcc:
and the same of th	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:
Letter' page	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)
	nments

**Letter Content Options** 

- 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

## Letter Content Options – Merge Fields & Deep Links

	Edit 'Reviewer Reminder' Letter					
HTML form	natting tags may be used. It is not necessary to use the <html> or <body> tags.</body></html>					
	Cancel Preview Letter Save					
Letter Purpose:	Reviewer Reminder - Before Due Date					
Subject:	Review assignment for %MS_NUMBER% is due soon					
Letter Family:						
Sender's E- mail Address	"12.0 Demo" <demo@ariesys.com></demo@ariesys.com>					
maii Addiess	<ul> <li>Use Corresponding Editor's E-mail address</li> </ul>					
	<ul> <li>Use Corresponding Production Editor's E-mail address</li> </ul>					
Letter Body:	Insert Image Insert Custom Merge Field Insert System Merge Field					
%MS_NUMBER% %ARTICLE_TIT						
%JOURNALFULL						
	%LAST_NAME%,					
Just as a re %REVIEW_DUE_	minder, your review of manuscript number %MS_NUMBER% is due by DATE%.					
To access th Assignments	is submission please click this link to be brought to your Pending folder: %PENDING_ASSIGNMENTS_DEEP_LINK%					
Kind regards	,					
%EDITOR_NAME %EDITOR_ROLE %CUSTOM EMUG	% A second of the second of th					

## Letter Content Options – 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

Sort In Alphabetical Order

Edit Image Files for HTML Letters

Edit Image Files for HTML Letters

Custom Merge Fields			Actions		
6CUSTOM_EMUG%	View Content	Edit Definition	Edit Letter Templates	Сору	Remove

Add New Field

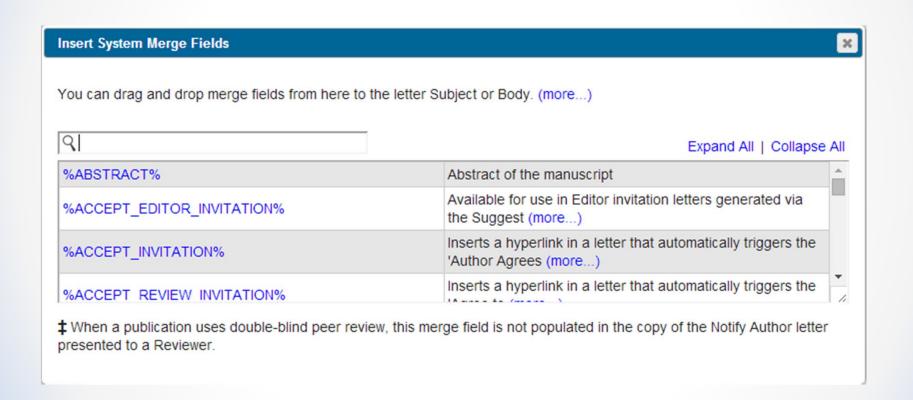
## Letter Content Options – Custom Merge Fields

#### **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 chara	acters and underscores allowed, no spaces
Content:	Insert Image Insert Special Character
Custom Merge Field for EMUG	2013
	Preview in HTML Format

Letter Content Options – System Merge Fields



## 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

# More on Deep Links

#### A Deep Link can be set to expire

☐ 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

# More on Deep Links

#### Set 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 Re	eviewer into their Pending	Assignments folder o	on the Reviewer Main Menu
----------------------------	----------------------------	----------------------	---------------------------

1	Expire link after	1	clicks

Expire	link	after	days

Cancel

Submit

## HTML in Letters

Allows greater customization of your letter templates

## HTML in Letters

- o HTML can be used for:
  - Inserting formatting (bold text, colored text, etc.)
  - Inserting images
- Deep Links display as text links in HTML
  - o %PENDING\_ASSIGNMENTS\_DEEP\_LINK%
  - http://demosgg120/edmgr.com/l/asp?i=3328&1=LKOLO
     vs Pending Assignments

## HTML Letter Templates

#### **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	t Forma	t HTMI	L Format	All Formats
Journal Office Notice Editor Decision Notification	General	•	Edit	0	Edit	Remove   Hide
Editor Agrees to Handle Assignment	General	•	Edit	0	Edit	Remove   Hide
Journal Office Notice Editor Decision Rescinded	General	•	Edit	0	Edit	Remove   Hide
Journal Office Notice Declined Revision Reinstated	General	•	Edit	0	Edit	Remove   Hide
Journal Office Notice All Reviews Complete	General	•	Edit	0	Edit	Remove   Hide
Journal Office Notice Author Declines to Revise	General	•	Edit	0	Edit	Remove   Hide
Journal Office Notice Completed Review	General	•	Edit	0	Edit	Remove   Hide
Journal Office Notice of Proxy Registration	General	•	Edit	0	Edit	Remove   Hide
Journal Office Notice of Review Assignment	General	•	Edit	0	Edit	Remove   Hide
Journal Office Notice Revised Submission	General	•	Edit	0	Edit	Remove   Hide

## Adding Image Files

#### Edit Image Files for HTML Letters

Click 'Upload New Image File' to add a new image. Click 'Edit' to change the image description. The 'E-mail Link' is the text which should be inserted into an HTML-formatted letter at the point you wish the image to appear.

Upload New Image File

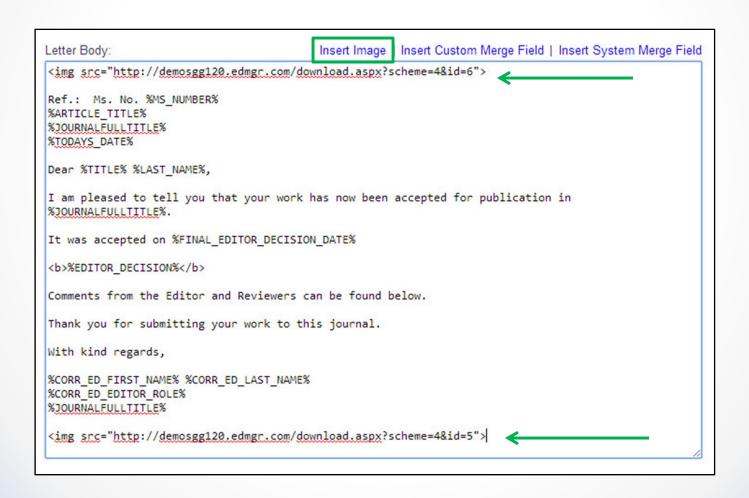
Close

File Name	Image Description	E-mail Link	Actions
edman.293.v.gif	EM logo	<pre><img src="http://demosgg120.edmgr.com/download.aspx?scheme=4&amp;id=1"/></pre>	Download Edit/Replace
pk1.JPG	Logo	<pre><img src="http://demosgg120.edmgr.com/download.aspx?scheme=4&amp;id=2"/></pre>	Download Edit/Replace
editorsmonthly_final5.png	Editors Monthly	<pre><img src="http://demosgg120.edmgr.com/download.aspx?scheme=4&amp;id=3"/></pre>	Download Edit/Replace
20130209_171833.jpg	Signature	<pre><img src="http://demosgg120.edmgr.com/download.aspx?scheme=4&amp;id=4"/></pre>	Download Edit/Replace
Aries.gif	Aries	<pre><img src="http://demosgg120.edmgr.com/download.aspx?scheme=4&amp;id=5"/></pre>	Download Edit/Replace
EM.jpg	Em2	<pre><img src="http://demosgg120.edmgr.com/download.aspx?scheme=4&amp;id=6"/></pre>	Download Edit/Replace

Upload New Image File

Close

## HTML Letter Templates – Inserting Images



HTML Letter Templates – Select Image from drop-down menu



### HTML Letter Templates – Preview Letter Template

Preview Letter - Editor Decision - Accept

To permanently save this letter, close this window and click 'Save' on the Edit Letter page.

Close

## Editorial Manager

Ref.: Ms. No. %MS\_NUMBER% %ARTICLE\_TITLE% %JOURNALFULLTITLE% %TODAYS\_DATE%

Dear %TITLE% %LAST\_NAME%,

I am pleased to tell you that your work has now been accepted for publication in %JOURNALFULLTITLE%.

It was accepted on %FINAL\_EDITOR\_DECISION\_DATE%

#### %EDITOR\_DECISION%

Comments from the Editor and Reviewers can be found below.

Please review our Production Guidelines for further information.

Thank you for submitting your work to this journal.

With kind regards,

%CORR\_ED\_FIRST\_NAME% %CORR\_ED\_LAST\_NAME% %CORR\_ED\_EDITOR\_ROLE% %JOURNALFULLTITLE%



## HTML in Letters

#### Email with Merge Fields, Images, Deep Link and URL



Ref.: Ms. No. DEMOSGG-15-39 HTML Letter SGG Demo 12.0 06/11/2015

Dear Mr. Barker,

I am pleased to tell you that your work has now been accepted for publication in SGG Demo 12.0.

It was accepted on 06/11/2015

#### Accept

Comments from the Editor and Reviewers can be found below.

Please review our Production Guidelines for further information.

Thank you for submitting your work to this journal.

With kind regards,

Steven Gain Editor in Chief SGG Demo 12.0



# Example HTML

HTML opening tag	HTML closing tag	
<a href="" target="&lt;br">'_blank'&gt;</a>		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.
<blookquote></blookquote>		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  tags.
<div></div>		Defines a division or section. Used to group block-level elements and to format them with CSS. Inline Only inline CSS style declarations can be used in EM Emails.
<em></em>		Defines emphasized text (most browsers display in italics).
<h1></h1>		Defines HTML headings 1 (largest) through 6 (smallest).
<h6></h6>		
<hr/>		Defines a thematic break in an HTML page. Used to separate content.  No closing tag.
<i>&gt;</i>		Defines a part of text in an alternate voice or mood. (Usually displayed in italic.)
<img/>		Displays an image. The two attributes "src" and "alt" are required. For example: <img "32px"="" alt="image not found" height="" src="http://ld8a787de4174f1aa625- 28a4b9047a732d2a8879bfd4a1538bd8.r56.cf3.rackcdn.com/gg_0091.jpg" width='140px"'/> (You need the full URL to put an image into an email.)
di>		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.
<ol></ol>		Defines an ordered (numbered) list, which is made up of List Item <li>tags.</li>
>		Defines a paragraph.
<small></small>		Defines smaller text.
<span></span>		Used to group inline elements and to format them with CSS. Only inline CSS style declarations can be used in EM Emails.
<strong></strong>		Defines important text.
<sub></sub>		Defines subscripted text.
<sup></sup>		Defines superscripted text.
		Defines a table.  and  tags are used.
>		Defines a cell in a table. Used within  tags.
		Defines a header cell in a table. Used within  tags.
		Defines a row in a table. Used within  tags.
<u></u>		Represents some text that should be stylistically different from normal text, such as misspelled words or proper nouns in Chinese.
<ul></ul>		Defines an unordered (bulleted) list, made up of <li>items.</li>

# 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

- 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

	Add Editorial Co	rrespondence			
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

#### 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.

Display In Author's C	orrespondence History						
* Correspondence Date	06/19/2015 (mm/dd/yyyy)	Time	Hour 10	Minute 30	AM/PM AM ▼	U.S. Eastern Time	
* Description:	Joy of Letters						
From:	Author - Seven Gain						
То:	Manuscript Coordinator - Elisha Daley						
Letter Subject:	Query on submission status						1
@ Attachments:	Add/Change Attachments						
Letter Contents:					Inser	t Special Character	Open in New Window

#### 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

# External 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 email 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

# External E-Mail Drop-Box

- What is an EMID?
  - A unique code appended to the subject line of an email
  - o 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

#### PolicyManager Main Menu

Expand All

Collapse All

- **■** Status Policies
- **⊞** Submission Policies
- **■** Questionnaire Policies
- Additional Data Policies
- **⊞** Editor Assignment 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

#### **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

■ Action ▲	Manuscript Number ▲▼	Article Type ▲▼	Section/ Category ▲▼	
View Submission Duplicate Submission Check (0%) Details V 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

From: em.demosgg120.1.43b2d4.968b7813@editorialmanager.com on behalf of Steven Gain <em@editorialmanager.com>
Sent: Tue 6/9/2015 10:23 AM
To: Steven Gain
Cc:
Subject: Email to Author - [EMID:b53494aef76c2512]

EMUG 2015 - EMID Example





CORRESPONDENCE I	HISTORY					
		Add Editor	rial Correspon	dence		
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

## Ad Hoc E-Mail Options

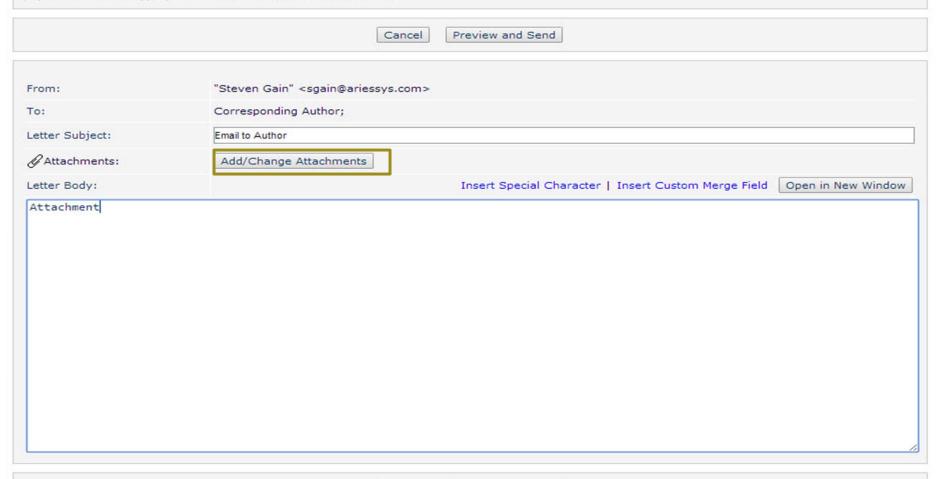
#### Edit 'Ad Hoc From Editor' Letter Cancel Save Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-Custom mail, click the 'Preview and Send' button, proofread the letter and Instructions click the 'Send' button on 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: General Email to Author Subject: Email to Author Letter Family: • Ad Hoc From Editor Editor Roles None Selected Select All That Can Send ALL EDITOR ROLES This Letter Editor in Chief Clear All Associate Editor Editorial Coordinator > Sender's E-Use E-mail address of user triggering the Correspondence mail Address "12.0 Demo" <demo@ariesys.com> "12.0 Demo" <demo@ariesys.com> Recipient: "12.0 Demo" demo@ariesys.com Corresponding Editor Corresponding Production Editor Display text box so sender can insert an e-mail address

Letter templates can be configured to allow attachments

	cc: bcc:
	Display checkbox for co-Authors
	<ul> <li>Display checkbox for Reviewers assigned to current Revision</li> </ul>
	<ul> <li>Display checkbox for Editors assigned to current Revision</li> </ul>
	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 attac	hments
Letter Body:	Insert Custom Merge Field   Insert System Merge Field
Attachments	
	Cancel Save
	Caricei

#### 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.



Preview and Send

Cancel

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
•	Original	Editor/Author Version	2.5 MB	03/03/2015
	Original	Reviewer Version	2.5 MB	03/03/2015

#### **Submission Files**

Тор

Select	File Name	Description	Item	Size	Last Modified
	COPE_BAMS_DistributionCopy5.docx		Manuscript	15.9 MB	03/03/2015
	COPE_BAMS_Supplement_v2.docx		Manuscript	135.3 KB	03/03/2015
	BAMS-D-14-00157_CoverLetter.docx		Manuscript	70 KB	03/03/2015
•	IEPC_BAMS-D-14-00157.pdf		Manuscript	538.9 KB	03/03/2015

Cancel

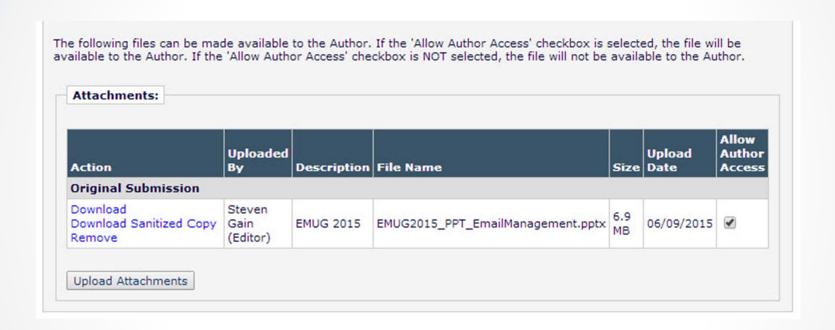
Proceed

#### 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></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	

### Notify Author Screen



#### PolicyManager Main Menu

#### Expand All

Collapse All

- **Status Policies**
- Submission Policies
- Questionnaire Policies
- Additional Data Policies
- **⊞** Editor Assignment Policies

- ⊕ General Policies
- **⊞** Discussion Forums
- **★** Conference Submission Policies
- **⊞** Transmittal Policies
- □ OProduXion Manager
  - Configure Attachment Security
  - ©Edit Instructions for Attachments
  - Set Attachments Deep Link Policy

#### **Author Access**

#### 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

### **Attachment Availability**

#### 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:		
Designate Reviewer-uploaded files as available by default to		

#### **Attachment Sanitization**

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.

 Allows editors to edit and resend email from Correspondence History

- Any letter can be resent using the "Resend" button in the Correspondence History
- RoleManager permission allows editors to edit and resend letters
- Can edit recipient, CC/BCC recipients, letter body and subject line
- Can add/remove attachments
- Decision letters can not be edited
- Co-Author confirmation letters should be sent from the Author Status link on the Details Page

#### **View Letter**

Close Edit and

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 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. Cancel Send From: "Steven Gain" <sgain@ariessys.com> To: ✓ "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. Letter Subject: 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 (;). tbadman@ariesys.com Attachment(s): Add/Change Attachments Insert Special Character | Open in New Window Letter Body: EMUG 2015 - Edit and Resend

## Edit and Resend E-mail RoleManager Permission

- ✓ 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
- ✓ View Notes on Manuscript Details
- Edit Notes on Manuscript Details
- Turn On Manuscript Notes Flag
- Turn Off Manuscript Notes Flag

- Shared Letter Management v12.1
- Usage Column on Edit Letters Page
- Email Icon on Details Page
- Rich Text Management

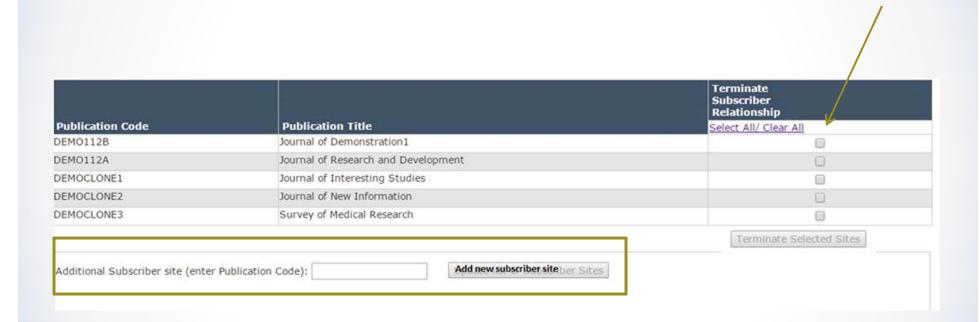
### Shared Letters Management

Share Letter ▲▼	Letter Purpose	Letter Family  Group by: ▲▼	Text I	Format	нтмі	Format	All Formats	
	Welcome1	General	0	Edit	•	Edit	Remove   Hide	
	Welcome 2	General	0	Edit	0	Edit	Remove   Hide	
	Appeal Reject Decision	Ad Hoc from Author	0	Edit	0	Edit	Remove   Hide	
	Assign Production Task	Production	0	Edit	0	Edit	Remove   Hide	
	Attachments to Author	Ad Hoc From Editor	0	Edit	0	Edit	Remove   Hide	
	AU - Notice that Associate Editor was assigned	Invite/Assign/Unassign Editor	0	Edit	0	Edit	Remove   Hide	
	Author - return submission	Communications to Author	0	Edit	0	Edit	Remove   Hide	
	Author Approve Changes	General	0	Edit	0	Edit	Remove   Hide	
	Author Corrections	Production	0	Edit	0	Edit	Remove   Hide	
	Author Instructions and Due Date	General	0	Edit	0	Edit	Remove   Hide	
	Author Invitation	Communications to Author	0	Edit	0	Edit	Remove   Hide	
	Author Invitation for Commentary	Author Invitation	•	Edit	0	Edit	Remove   Hide	
	Author Invitation for Proposal	Author Invitation	•	Edit	0	Edit	Remove   Hide	

Hidden Letters							
Letter Purpose	Letter Family  Group by: ▲ ▼	Text Format		HTML Format		All Formats	
Welcome letter to be hidden	General	•	<u>Edit</u>	0	<u>Edit</u>	Remove   Restore	
None	General	0	<u>Edit</u>	•	Edit	Remove   Restore	

Add New Letter | Save Changes | Save Changes and Push Shared Letters | Edit Image Files for HTML Letters

Shared Letters Management – Add or remove sites



### Shared Letters Management – Share Letters across sites

	Add New Letter   Save Changes   Edit Image Files for HTML Letters   Manage Letter Subscriptions   Replace Selected Letters with Shared Letters							
Replace with Shared Letter	Letter Purpose A♥	Letter Family <i>Group by:</i> ≜▼	Text Format		HTML Format		All Formats	
	Welcome 1	General	0	Edit	•	Edit	Remove	
	Welcome 2 S	General		Edit	•	Edit	Remove	
	Appeal Reject Decision	Ad Hoc from Author	0	Edit	•	Edit	Remove	
	Author Invitation S	Communications to Author		Edit	•	Edit	Remove	
	Author Invitation for Proposal II §	Author Invitation		Edit	•	Edit	Remove	
	Author Notice Editor Made Changes to Submission	Communications to Author	0	Edit	•	Edit	Remove	
	Author Notice Journal Office Removes Submission	General	0	Edit	•	Edit	Remove	
	Author Notice of Final Dispostion	General	0	Edit	•	Edit	Remove	
	Author Proof - Assign	Production	0	Edit		Edit	Remove	

Letter Purpose	Letter Family	Replace with:
Welcome 1	General	Please Choose ▼
Appeal Reject Decision	Ad Hoc from Author	Please Choose ▼
Assign Production Task	Production	Please Choose ▼
Attachments to Author	Ad Hoc From Editor	Please Choose ▼
AU - Notice that Associate Editor was assigned	Invite/Assign/Unassign Editor	Please Choose 🔻
Author - return submission	Communications to Author	Please Choose ▼
Author Approve Changes	General	Please Choose ▼
author corrections	Production	Please Choose ▼

# Upcoming Features Usage Colum

#### **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 Family Group by: ▲ ▼	ActionManager Roles and Events		Text Format		L Format	All Formats	
General	Section Ed - Editor Agree to Assignment	•	<u>Edit</u>	0	<u>Edit</u>	Remove   Hide	
Invite/Assign/Unassign Editor	Associate Editor  - Editor Assigned (Not Invited)  Editor-in-Chief  - Editor Assigned (Not Invited)	•	Edit	0	Edit	Remove   Hide	
	Group by: ▲ ▼ General	General  General  ActionManager Roles and Events  Section Ed  - Editor Agree to Assignment  Associate Editor  - Editor Assigned (Not Invited)  Editor-in-Chief	General  General  ActionManager Roles and Events  Section Ed — Editor Agree to Assignment  Associate Editor — Editor Assigned (Not Invited) Editor-in-Chief  ActionManager Roles and Events  Tex  Section Ed — Editor Assignment	General  General  Section Ed — Editor Agree to Assignment  Associate Editor — Editor Assigned (Not Invited)  Edit  Edit	General  General  ActionManager Roles and Events  Section Ed  — Editor Agree to Assignment  Associate Editor — Editor Assigned (Not Invited) Editor-in-Chief  Fig. 6  Edit  Edit  Edit   Edit   Edit	General  General  ActionManager Roles and Events  Section Ed  — Editor Agree to Assignment  Associate Editor — Editor Assigned (Not Invited) Edit  Edit  Edit  Edit  Edit  Edit	

Send Email Icon on Details Page



### Rich Text Management

