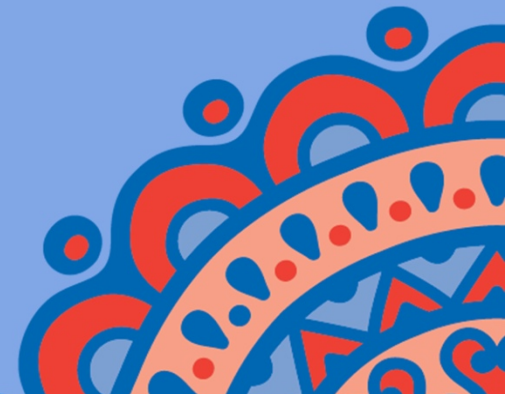


EM Bootcamp

Letters

Dianne Gullo , Sr. Account Coordinator dgullo@ariessys.com

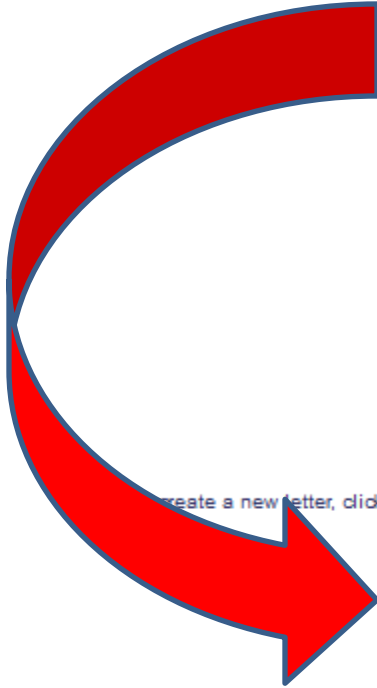


Letters



☐ 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](#)
- [Configure Email Import](#)
- [Set Notify Author Blinding Policy](#)
- [Set Notify Editor Preference](#)



Edit Letters

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

[Back to PolicyManager](#)

[Add New Letter](#) [Save Changes](#) [Edit Image Files for Letters](#)

Letter Purpose ▲▼	Letter Family Group by: ▲▼	Letter Format			All Formats
			Text	Rich Text (HTML)	
Author - Other Author Verification	Co-Author Communications	Author - Notify Other Authors	<input type="radio"/>	<input checked="" type="radio"/>	Remove Hide
Author Approve Changes	General		<input checked="" type="radio"/>	<input type="radio"/>	Remove Hide
Author Instructions and Due Date	General	Author - Author Agrees to Invitation	<input checked="" type="radio"/>	<input type="radio"/>	Remove Hide
Author Invitation for Commentary	Author Invitation	Author - Solicit Commentary on Submission	<input type="radio"/>	<input checked="" type="radio"/>	Remove Hide
Author Invitation for Proposal	Author Invitation	Author - Invite Authors for Proposal	<input checked="" type="radio"/>	<input type="radio"/>	Remove Hide

Letter Families

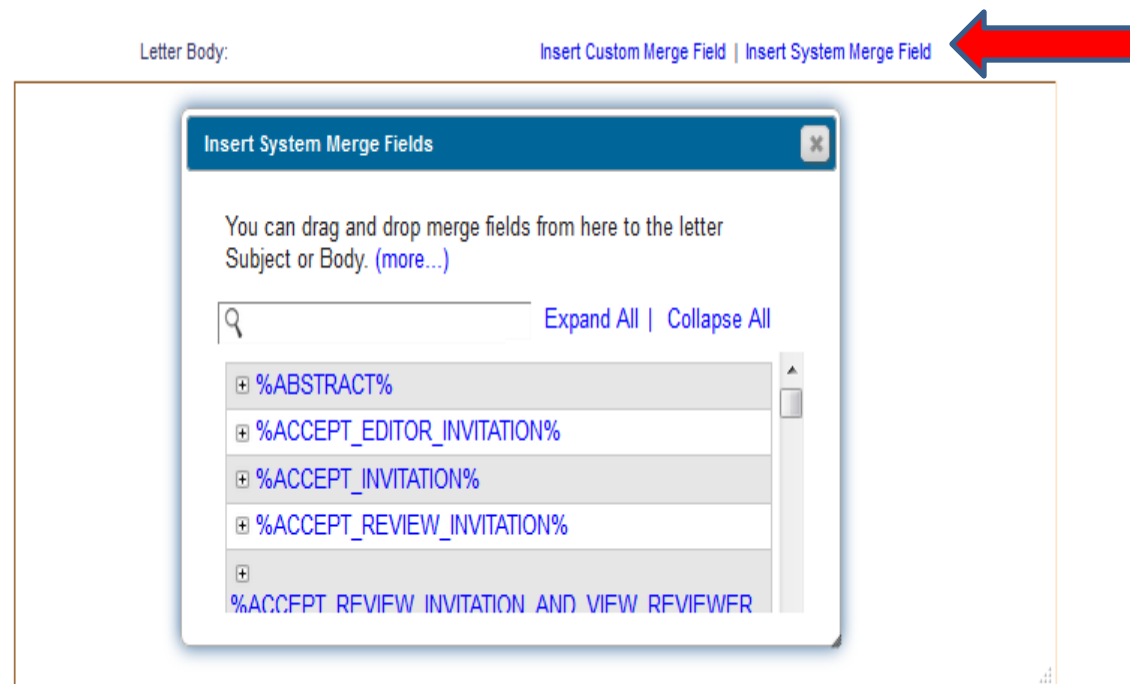
Letter Family	Purpose
Ad Hoc for Proposal	Available from Proposal Menu folders
Ad Hoc From Author	Available from Author folders
Ad Hoc From Editor	Available from Editor folders
Ad Hoc From Publisher	Available from Publisher folders
Ad Hoc From Reviewer	Available from Reviewer folders
Author Invitation	Available from Invite Authors and Solicit Commentary
Author Reminder	Available from all Author and Co-Author Reminder Reports
Batch E-mail	The Letter drop-down on the Batch-E-mail page is limited to these letters.
Co-Author Communications	For use with the Notify Other Authors event. Letters configured in this Letter Family can be configured to be sent "From" the Corresponding Author of a submission.
Communications to Author	For use with Send Back to Author, a step that allows the Editorial Office to send a manuscript back to the Author for changes before an Editor has been assigned
Decision	For Notify Author Letters (Decision Letters). Author Notification letter drop-down (on Edit Editor Decision Term page in PolicyManager) is limited to this Letter Family.
Discussion Forum	For use with Discussion Forum feature
Editor Reminder	Available from Editor Reminder Reports
Enterprise Analytics Reporting	For use in sending reports from the Enterprise Analytics Reporting tool
Fees And Payments	For use with Commerce Manager
General	All other letters, default family
Invite/Assign/Unassign Editor	Available from Assign Editor pages
Production	For production purposes.
Production Reminder	Available from Production Tasks Reminder reports
Reviewer Invitation	Available from Select Reviewer interface
Reviewer Notification	Available on the Edit Editor Decision Term page only, sent to Reviewers during Notify Author of Decision process.
Reviewer Reminder	Available from Reviewer Reminder Reports
Terminate Assignment	For use with Terminate Reviewer and Editor Assignment
Transferred Submissions	For use with Transferred Submissions. This Family is not available for new letters; there is only one letter in this Family for publications using the Transferred Submissions feature.

The purpose of letter families is to limit where a letter can be used.

For example, when an Editor sends Reminder Letters to Reviewers, the Editor will be presented with a drop-down selection box of letters assigned to the 'Reviewer Reminder' Letter Family, NOT the entire list of letters in EM.

Merge fields

- Merge fields that pull in information can be used in all letters.
- Merge fields that pull in submission information can only be used in letters related to specific submissions
- For ease of use there is an “Insert System Merge Field” link



Deep Links

- Deep Links are a class of Merge Field.
- Does not insert information, but rather inserts a hot link to various parts of the system:
 - Reviewer Invitation Accept/Decline.
 - Author Invitation Accept/Decline.
 - Attachments visibility.
 - Update personal information, such as address, keywords and classifications.
 - Editor Deep link.

NOTE: Because deep links log a user directly into EM we strongly suggest you expire them after “x” number of clicks, or “x” number of days, or both.

Ad hoc letters

Users from all role families may have a need to send email messages outside of the context of particular Action Manager events. Ad hoc letters are the way to do this.

Ad hoc emails must be assigned to a role family

- Ad hoc from author
- Ad hoc from Reviewer
- Ad hoc from Editor
- Ad hoc from publisher

Users with permission to “Send Email” will see a “Send email” action link in the list of action steps.

In the Ad hoc from editor family you can restrict which editors can send a specific email.

Ad hoc emails are stored in the history link along with all other internal and external correspondence.

Ad hoc emails can be configured for attachments.

Ad hoc from Editor recipient options

Letter Purpose: EMUG 2016 Boot Camp

Subject: Bootcamp

Letter Family: Ad Hoc From Editor

Editor Roles That Can Send This Letter

None Selected Select All
 ALL EDITOR ROLES Clear All
 Managing Editor
 Editor (by invitation)
 Editorial Assistant - with tech check

Sender's E-mail Address

Use E-mail address of user triggering the Correspondence
 "Training and Demonstration Journal" <trash1@ariessys.com>
 "PM Demo Email" <demo@emtesting.co.uk>

Recipient:

"Training and Demonstration Journal" trash1@ariessys.com
 User Selects Recipient using icon
 Corresponding Editor
 Corresponding Production Editor
 Display text box so sender can insert an e-mail address
 Display the following e-mail address for the recipient:
(Multiple addresses may be entered, separated by a semicolon)

First Assigned Editor
 Handling Editor
 Editor who made the first Editor assignment
 All Reviewers of the current revision of the submission
 Display all Reviewers of the current revision so sender can select recipient(s)
 Corresponding Author

- You can limit the Editor roles that will be able to send this letter.
- You can select the sender email.
- There are many recipient options such as :
 - Being able to select an email recipient from an icon on the details page
 - You can enter an email address of a person not associated with the submission.
 - Sending the email to all Reviewers of the current version.


Ad hoc emails and attachments


Cancel Proceed

Select Files

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

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

Browse your computer: 

Or drag and drop files here: 

Add Files from Submission Inventory

Select the checkbox next to the file(s) you would like to attach. [Submission Files](#)

System PDFs

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

Select	Submission Revision	PDF Version	Size	Last Modified
<input type="checkbox"/>	Original	Editor/Author Version	208.7 KB	May 19, 2016
<input type="checkbox"/>	Original	Reviewer Version	207.6 KB	May 19, 2016

Submission Files [Top](#)

Select	File Name	Description	Item	Size	Last Modified
<input type="checkbox"/>	manuscript.doc	Manuscript	Manuscript	22 KB	May 19, 2016

Cancel Proceed

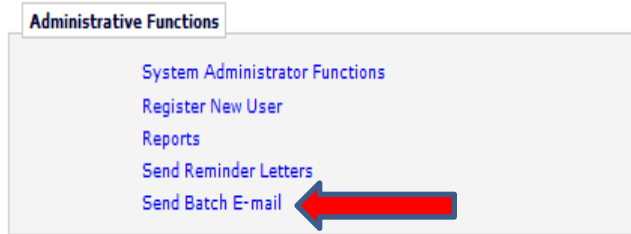
- Ad hoc letters can be configured to allow attachments from:
 - The submission files
 - The system PDF
 - Sender's personal files

Batch Email

Users with appropriate permission can send an email to ALL users that share the same role.

- All (everyone registered in your site)
- ALL Reviewer roles
 - Reviewer
 - Statistical Reviewer
- ALL Editor roles
 - Editor
 - Associate Editor
 - Editors-in-Chief
- ALL Publisher role
 - Production Manager
 - Production Assistant

Batch Email



The batch email link is found in the Administrative function section of the editor main menu.

Send Batch E-mail

Please choose the User Roles you want to receive the letter. You may select all, or one or more User Roles below. On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, hold down the 'Command' key while using the mouse to select the desired items.

User Role:
ALL AUTHOR ROLES
Author Role: Author
ALL REVIEWER ROLES

Select a letter to send to every user with the User Roles selected above.

Please Choose a Letter
Please Choose a Letter
Request update of user information
Welcome Letter - Go Live
See View Delivery Time of E-mail

Cancel Send E-mail Now

- Select the recipient role.
- Select the letter you wish to send from the pull down list of all letters in the batch email letter family.
- Schedule the delivery or send immediately.

NOTE: You do not have the opportunity to view or customize the letter before it is sent!

Request users update their personal information!

Some publications like to periodically request that their users review and update their personal information:

- Address
- Keywords
- classifications

Tools to help you do this: Batch email and deep links

- **%UPDATE_MY_INFORMATION_DEEP_LINK%** - Inserts a hyperlink for the recipient of the letter (the link is not visible in CC'd or BCC'd letters or in History). When clicked, the link brings the user directly to the 'Update My Information' page. Depending on the publication's configuration of the link, the user may or may not be required to enter their password before being able to proceed to the page. Available for use in all letters sent to all user roles.
- **%UPDATE_CLASSIFICATIONS_KEYWORDS_DEEP_LINK%** - Inserts a hyperlink in system letters to encourage users to update their Classifications and Personal Keywords. When clicked, the recipient is brought directly to a page where they may update their Classifications and Personal Keywords. The user will be prompted to log into EM to navigate to any other pages in the system.
- **%UPDATE_UNAVAILABLE_DATES%** - Inserts a hyperlink in system letters to encourage users to keep their unavailable dates up-to-date. When clicked, the recipient is brought directly to the 'Edit Unavailable Dates' page. The user will be prompted to log into EM to navigate to any other pages in the system.

Return to previous Editor from decision letter

Notify Author

Manuscript Number:
DEOMDG-81-21


Title: EMUG demo1

This draft was last saved by another editor.

If you agree with the previous editor's decision, you may continue with this draft notification.

To reject this decision and send the assignment back to the previous Editor, use the Return to (Editor) link.

To override this decision by submitting your own decision and comments, use the 'Submit New Decision' button.

Cancel		Submit Decision without Notifying Author		Submit New Decision			
Preview Letter		Save		Save and Close		Send Now	
Editor Decision:	Accept						
Rescind Decision:	Return to Editor 						
From:	"The Journal" <dgullo@ariessys.com>						
To:	Arthur Author						
Letter Purpose:	Editor Decision - Accept						
Letter Subject:	Your Submission						
The Editors assigned to the current version of the submission are shown below. Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank boxes next to cc: or bcc: below. Multiple e-mail addresses can be included, separated by semicolons (;).							
cc: bcc:							
Editors Assigned to Manuscript							
<input type="checkbox"/>	<input type="checkbox"/>	Gloria Smith (Editor)					
<input type="checkbox"/>	<input type="checkbox"/>	bob becker (Editor)					

With rescind decision permission an editor at the top of the editor chain can return a submission to a lower level editor from the decision letter.

Shared letter templates

Sites with the same business publisher can share letter templates.

One site is configured as the master site. Letter templates are then shared from this site.

Attend tomorrow's Multi-journal configuration options session for more details!

Thank You