EM Bootcamp
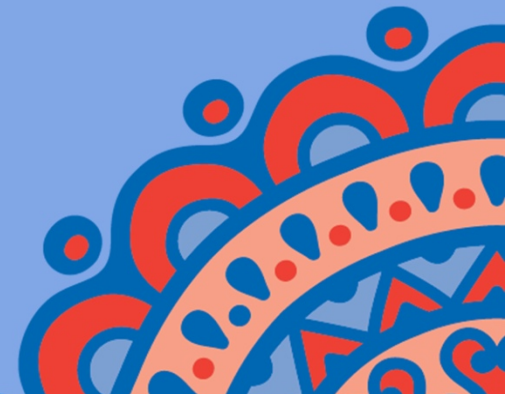
Letters

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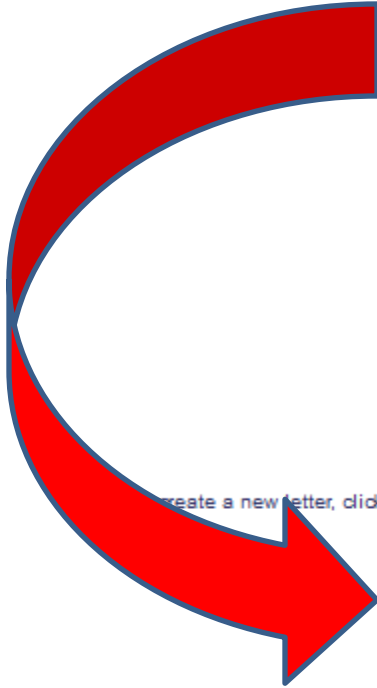
Letters

⊟ 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

reate a new etter, click 'Add New Letter'. To edit an existing letter click the 'Edit' link next to the letter title. (more...)

Back to PolicyManager

| Add New Letter | Save Changes | Edit Image Files for Letters |

Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format			
			Text	Rich Text (HTML)		All Formats
Author - Other Author Verification	Co-Author Communications	Author - Notify Other Authors	○ Edit	◉ Edit	Remove | Hide
Author Approve Changes	General		◉ 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
Author Invitation for Proposal	Author Invitation	Author - Invite Authors for Proposal	◉ Edit	○ Edit	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
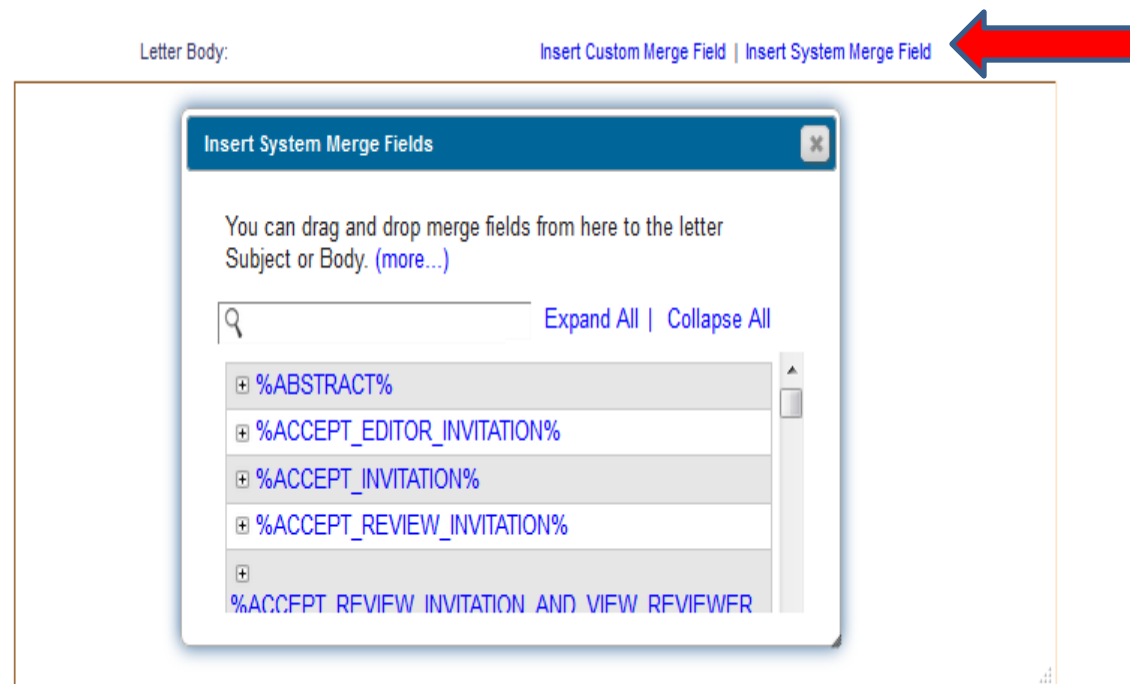
Deep Links

- 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
- ALL EDITOR ROLES
- Managing Editor
- Editor (by invitation)
- Editorial Assistant - with tech check

Select All
Clear All

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

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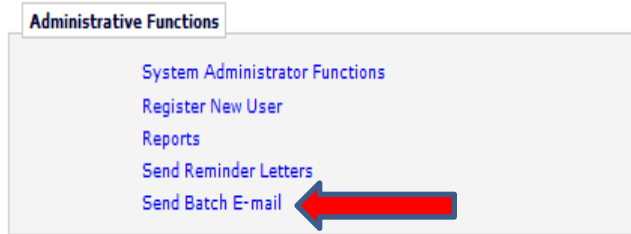
The batch email link is found in the Administrative function section of the editor main menu.

- 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

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