

# Boot Camp - Letters

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13th Annual **em** European  
**Editorial Manager**<sup>®</sup>  
User Group Meeting



# Letters



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# Letters

- Letters are used throughout the system for communicating assignments, inquiries, tasks, etc.
- Can be used for
  - Submission-related communications (saved to Correspondence History)
  - System correspondence (such as batch notifications, etc.)
  - Personal correspondence (username/password)
- Can use HTML and embed links into 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: ▲▼	ActionManager Roles and Events	Letter Format		
			Text	Rich Text (HTML)	All Formats
Author - Other Author Verification	Co-Author Communications	<a href="#">Author - Notify Other Authors</a>	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	<a href="#">Remove   Hide</a>
Author Approve Changes	General		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove   Hide</a>
Author Instructions and Due Date	General	<a href="#">Author - Author Agrees to Invitation</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove   Hide</a>
Author Invitation for Commentary	Author Invitation	<a href="#">Author - Solicit Commentary on Submission</a>	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	<a href="#">Remove   Hide</a>
Author Invitation for Proposal	Author Invitation	<a href="#">Author - Invite Authors for Proposal</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	<a href="#">Remove   Hide</a>

# Letter Families

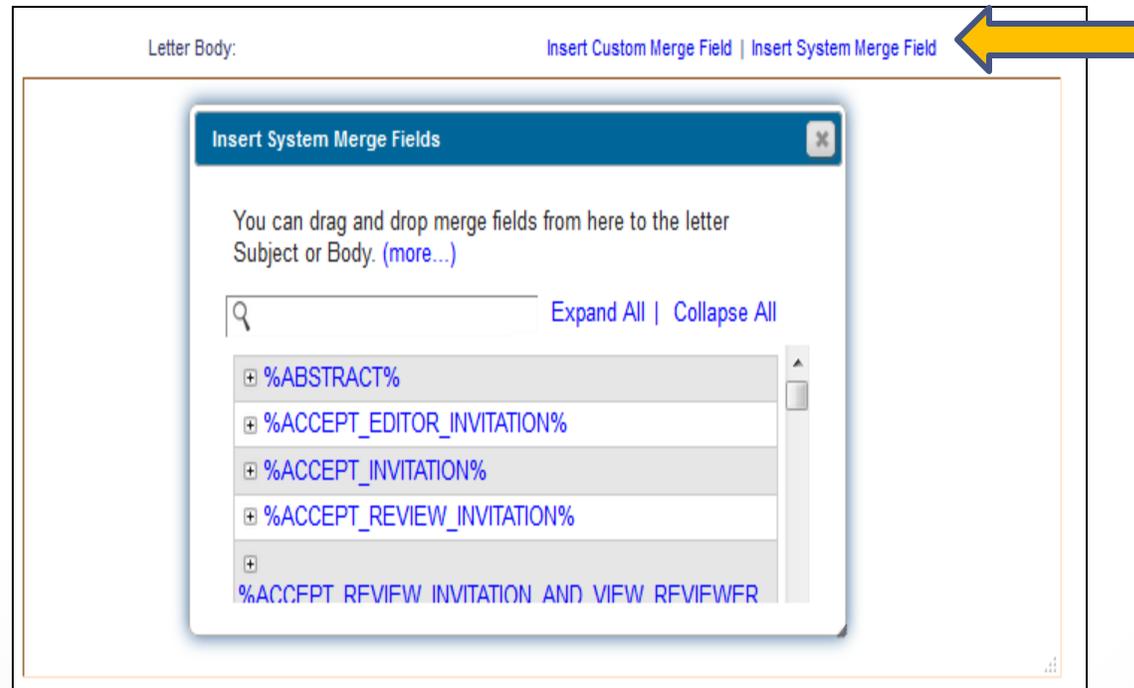
- Letter Families organize letters for specific purposes.
- Examples:
  - Publications using the Discussion Forum feature use letters in the “Discussion Forum” family
  - Publications using Proposals or Commentaries use letters in the “Author Invitation” family
  - Publications using Enterprise Analytics Reporting use letters in the “Enterprise Analytics Reporting” family for mailing reports

<b>Letter Family</b>	<b>Purpose</b>
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.

# 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



# Custom Merge Fields

- Create custom content, such as a standard signature
- For ease of use there is an “Insert Custom Merge Field” link

### 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   Edit Image Files for Letters

Custom Merge Fields	Actions
%CUSTOM_EMUG%	<a href="#">View Content</a> <a href="#">Edit Definition</a> <a href="#">Edit Letter Templates</a> <a href="#">Copy</a> <a href="#">Remove</a>

Sort In Alphabetical Order   Edit Image Files for Letters

Add New Field

# 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
  - View Reviewer PDF

**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 e-mail messages outside of the context of particular Action Manager events. Ad hoc letters are the way to do this.

Ad hoc e-mails must be assigned to a role family

- Ad Hoc From Author
- Ad Hoc From Reviewer
- Ad Hoc From Editor
- Ad Hoc From publisher

Users using Proposals also have their own Ad Hoc letter family:

- Ad Hoc For Proposal

# Ad Hoc Letters

Users with permission to “Send E-mail” will see a “Send E-mail” action link in the list of action steps.

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name
<ul style="list-style-type: none"><li>View Submission</li><li>Details ▶</li><li>History</li><li>Classifications</li><li>Unassign Editor</li><li>File Inventory</li><li>Edit Submission</li><li>Invite Reviewers</li><li>Solicit Commentary</li><li>View Reviews and Comments</li><li>Set Final Disposition</li><li>Initiate Production</li><li>Google Scholar Title Search</li><li>Corresponding Author ORCID Search</li><li><b>Send E-mail</b></li><li>Linked Submissions</li></ul>	DEMO541	Original Research		use of stents 4	Anthony Author MD

# 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 e-mail
- There are many recipient options such as:
  - Select an e-mail recipient from an envelope icon on the Details page
  - Enter an e-mail address of a person not associated with the submission
  - Send the e-mail to all Reviewers of the current version

# External E-mail

External Correspondence can be added to a submission record too!!

- Manually added to History

CORRESPONDENCE HISTORY					
<a href="#">Add Editorial Correspondence</a>					
Correspondence Date	Letter	Recipient	Status	Revision	Operator
05/17/2016	<a href="#">Reviewer Invitation Declined</a>	Kevin Boyle	Under Review	0	Kevin Boyle [Proxied by Steven Gain]
05/17/2016	<a href="#">Editor Notice Reviewer Declines to Review</a>	Steven Gain	Under Review	0	Kevin Boyle [Proxied by Steven Gain]
05/17/2016	<a href="#">Journal Office Notice of Review Assignment</a>	Steven Gain	Under Review	0	Steven Gain
05/17/2016	<a href="#">Journal Office Notice of Review Assignment</a>	Steven Gain	Under Review	0	Steven Gain
05/17/2016	<a href="#">Reviewer Invitation</a>	Kevin Boyle	Under Review	0	Steven Gain
05/17/2016	<a href="#">Author Notice of Manuscript Number</a>	Jeff Tassi, MD	Manuscript Submitted	0	Steven Gain
05/17/2016	<a href="#">Journal Office Notice New Submission</a>	Joan Lewis	Manuscript Submitted	0	Jeff Tassi, MD
05/17/2016	<a href="#">Author Submits New Manuscript Confirmation</a>	Jeff Tassi, MD	Manuscript Submitted	0	Jeff Tassi, MD
05/17/2016	<a href="#">PDF Built and Requires Approval</a>	Jeff Tassi, MD	Needs Approval	0	Jeff Tassi, MD



# External E-mail

- Configure the E-mail Drop Box and send it there

### 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.demosgg122-1a0a225175aa4b24@editorialmanager.com

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:**

[Return to PolicyManager](#)

# E-mails 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:

[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
<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](#)

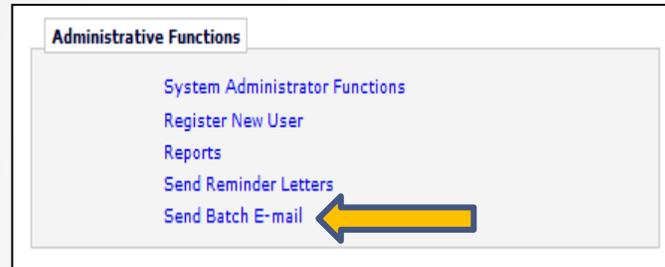
- Letters can be configured to allow attachments from:
  - The submission files
  - The system PDF
  - Sender's personal files

# Batch E-mail

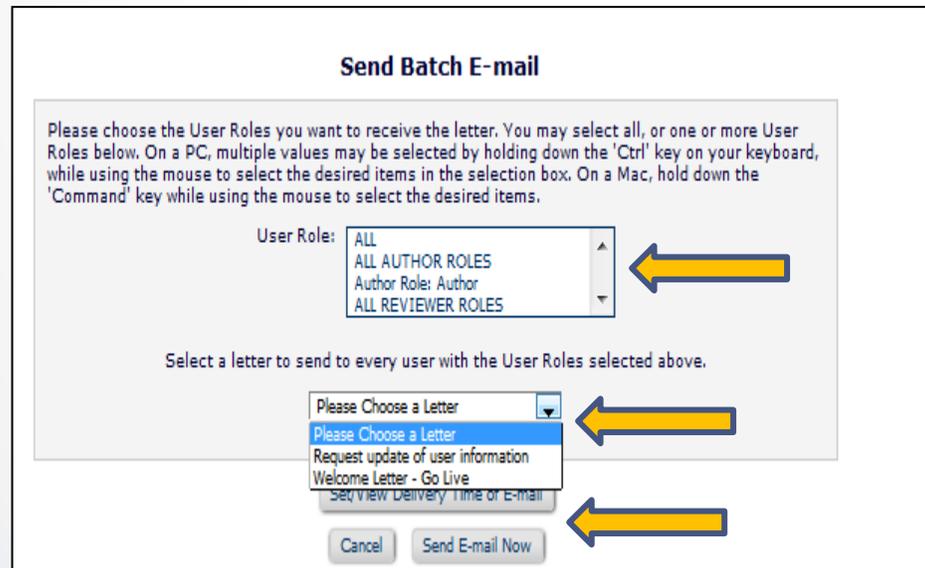
Users with appropriate permission can send an e-mail to ALL users that share the same role.

- 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 E-mail



The batch e-mail 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 e-mail 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 e-mail 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.

# Automated Editor Reminders

## Configure in PolicyManager

### Automated Editor Summary Reminders

If enabled for an Editor Role, Editor Summary Reminders are periodically sent to all such Editors with Assignments that meet the Reminder criteria and with the frequency defined below. Only Editor Roles that can receive assignments are listed below.

To enable Summary Reminders for a Role, select the 'Send' checkbox and define a Frequency below, and select a letter to be sent. Enter a specific 'Next Reminder Due' date to control when the first reminder is sent, or leave blank to send the first reminder in the next daily reminder run. Selecting the 'Use Criteria' option ensures that Editors do not receive an E-mail until they have one or more assignments meeting the criteria; leaving this un-selected for a Role means that these Editors will always receive a summary at the defined interval, even if they have no assignments. Only one letter is sent to each Editor included in the Summary Reminder run, even if they have multiple open invitations or assignments.

#### Role Settings

Send	Editor Role	Frequency (Days)	Next Reminder Due	Summary Letter	Use Criteria
<input type="checkbox"/>	Associate Editor	<input type="text"/>	<input type="text"/>	Please Choose an Automated Reminder Letter <input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Editor-In-Chief	<input type="text"/>	<input type="text"/>	Please Choose an Automated Reminder Letter <input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Everything Editor	<input type="text"/>	<input type="text"/>	Please Choose an Automated Reminder Letter <input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Managing Editor	<input type="text"/>	<input type="text"/>	Please Choose an Automated Reminder Letter <input type="text"/>	<input type="checkbox"/>

#### Criteria

**Editor Invitations Awaiting Response:** Include Editors who received an Invitation  or more days ago, but have not yet accepted or declined the invitation.

**New Editor Assignments:** Include Editors who were assigned or accepted an Invitation  or more days ago, but have not yet invited reviewers or assigned the submission on to another Editor.

**Required Reviews Complete:** Include Editors who are the Handling Editor, with submissions that reached Required Reviews Complete status  or more days ago and on which they have not yet submitted their recommendation/decision. A value of zero is permitted.

Letter Body: [Insert Image](#)

Dear `#{GREETING#}`,

Here is a summary of key folders in your To-Do list. You have been sent this summary because some of these items may require your attention:

New Invitations (`#{EDITOR_NEW_INVITATIONS_TOTAL#}`); longest elapsed time `#{EDITOR_NEW_INVITATIONS_DAYS#}` days

`#{EDITOR_NEW_INVITATIONS_SUBMISSIONS#}`

New Assignments (`#{EDITOR_NEW_ASSIGNMENTS_TOTAL#}`); longest elapsed time `#{EDITOR_NEW_ASSIGNMENTS_DAYS#}` days

`#{EDITOR_NEW_ASSIGNMENTS_SUBMISSIONS#}`

Submissions with Required Reviews Complete (`#{EDITOR_REQUIRED_REVIEWS_COMPLETE_TOTAL#}`); longest elapsed time `#{EDITOR_REQUIRED_REVIEWS_COMPLETE_DAYS#}` days

`#{EDITOR_REQUIRED_REVIEWS_COMPLETE_SUBMISSIONS#}`

You may click this link to log in and view your main menu and To-Do list:|

`#{EDITOR_MAIN_MENU_DEEP_LINK#}`

Regards

# 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.**

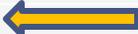
If you agree with the previous editor's decision, you may continue with this draft notification.

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:	<a href="#">Return to Editor</a> 
From:	"The Journal" <dgullo@ariessys.com>
To:	<a href="#">Arthur Author</a>
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"/>	<a href="#">Gloria Smith (Editor)</a>
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">bob becker (Editor)</a>

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.

# Attachments on Decision Letter

**Attachments:**

Action	Uploaded By	Description	File Name	Size	Upload Date	Allow Author Access
<b>Original Submission</b>						
<a href="#">Download</a> <a href="#">Download Sanitized Copy</a>	Oliver Bennett (Reviewer 1)		Reviewer Comments.doc	48.0 KB	May 20, 2016	<input checked="" type="checkbox"/>

[Upload Attachments](#) 

Journal can configure Attachments to be sent AS an attachment on Author Notification Letter.

## 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

# 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!

### Configure Shared Letters Management

Confirming the letter sharing relationship and establishing a shared letters group is the responsibility of the publications involved.

The Shared Letters feature enables one site (known as a "master site"), to designate specific letter templates as "shared" and then push those shared letter templates to selected sites, known as "subscriber sites".

To configure this site as a master site for the Shared Letters feature, select the checkbox 'Enable Shared Letters and designate this site as a master site', then click the Submit button. The confirmation page will contain a "Manage Subscriber Sites" link, allowing you to add subscriber sites.

*To designate letter templates as "shared" and push them to subscriber sites:  
First configure this site as a master site on this page and add subscriber sites using the "Manage Subscriber Sites" link. Then go to PolicyManager, Edit Letters for letter configuration.*

Enable Shared Letters and designate this site as a master site.

Cancel Submit

Thank You