

Welcome to EEMUG 2018

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pm

Letters, Improved

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Letters, Improved

- Improved Edit Letters Page
- Rich Text Letters, Editing & Formatting
- Adding Images & links etc. Into Letters
- Merge Fields
- Email Autofill
- Adding Recipients with the Envelope Icon
- Rich Text Letter Formatting for Non HTML Letters
- Letter Inventory
- Correspondence History
- Shared Letters

Letters = Communication



Improved Edit Letters Page

What Letter is Who Getting and When?

Improved Edit Letters Page

Edit Letters

This site is a master site for the Shared Letters feature. To share letters across all publications in a Shared Letters group, first add Subscriber Sites in AdminManager. Then, select the Share Letter checkbox for each letter template that you want to be available to subscriber sites, then click the 'Save Changes and Update Subscriber Sites' button. ([more...](#))

[View Subscriber Sites](#)

[Back to PolicyManager](#)

Add New Letter

Save Changes and Update Subscriber Sites

Edit Image Files for Letters

Share Letter	Letter Purpose ▲▼	Letter Family Group by: ▲▼	ActionManager Roles and Events	Letter Format		All Formats
				Text	Rich Text (HTML)	
<input checked="" type="checkbox"/>	Ad Hoc From Editor	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input checked="" type="checkbox"/>	Author - Other Author Verification	General	Author - Notify Other Authors	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input checked="" type="checkbox"/>	Author - Other Author Verification Reminder	Author Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Approve Changes	General		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Changed Invited Due Date Confirmation	General	Author - Invited Submission Due Date Changed	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Instructions and Due Date	General	Author - Author Agrees to Invitation	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Invitation for Commentary	Author Invitation	Author - Solicit Commentary on Submission	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Invitation for Proposal	Author Invitation	Author - Invite Authors for Proposal	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Letter for Invitation for Book Review	Author Invitation		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Notice - Technical Check failure	Communications to Author	Author - Submission Sent Back to Author	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Notice - MS Outside of Publication Scope	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

- Can see clearly which roles and events each letter is set for.
- Can sort by Letter Purpose or Letter Family
- Can Add, Hide or Remove Letter Templates

Improved Edit Letters Page

<input type="checkbox"/>	Editor Agrees to Handle Assignment	General	Associate Editor - Editor Agree to Assignment Editor - Editor Agree to Assignment Managing Editor - Editor Agree to Assignment	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Assignment	Invite/Assign /Unassign Editor	Associate Editor - Editor Assigned (Not Invited) Editor - Editor Assigned (Not Invited)	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Assignment - Proposal	Invite/Assign /Unassign Editor		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Assignment Undone	Invite/Assign /Unassign Editor	Associate Editor - Editor Unassigned Editor - Editor Unassigned	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Automated Summary Reminder	Editor Reminder		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Decision - Accept	Decision		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Decision - Reject	Decision		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Decision - Revise	Decision		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Declines to Handle Assignment	General	Associate Editor - Editor Declines Invitation from an Editor Editor - Editor Declines Invitation from an Editor Managing Editor - Editor Declines Invitation of New Submission Managing Editor - Editor Declines Invitation from an Editor	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Initiate Author Rebuttal	General	Author - Initiate Rebuttal	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Invitation	Invite/Assign /Unassign Editor	Associate Editor - Editor Invited for Assignment Editor - Editor Invited for Assignment	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Misc. Notification	General		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Note for Author	Ad Hoc From Editor		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Notice All Reviews Complete	General	Associate Editor - Required Reviews Complete Editor - Required Reviews Complete	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Notice an Assignment was Undone	Invite/Assign /Unassign Editor	Associate Editor - Editor Unassigned Notification Editor - Editor Unassigned Notification Managing Editor - Editor Unassigned Notification	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Notice Author Agrees to Assignment	General	Associate Editor - Author Agrees to Invitation Editor - Author Agrees to Invitation Managing Editor - Author Agrees to Invitation	<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide
<input type="checkbox"/>	Editor Notice Author	General		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove Hide

- Can see clearly which roles and events each letter is set for.
- Can sort by Letter Purpose or Letter Family
- Can Add, Hide or Remove Letter Templates

ActionManager

Registration

Event	Author Letters
New User Registers	Welcome
Forgot Username or Password	Send Username and Password
Forced Username Change	NONE
Merged Duplicate Users	Merge Duplicate User Notice
User is Made Inactive	NONE
Proxy Register New User	Welcome

Author Submission

Event	Author Letters
Incomplete Submission by Author	NONE
Author Removes Submission	NONE
Building PDF for Author	NONE
Author PDF Build Error	Author PDF Build Error
Original PDF Built by Author	PDF Built and Requires Approval
Revised PDF Built by Author	PDF Built and Requires Approval
Author Returns Submission to Publication	NONE

Author Revision

Event	Author Letters
-------	----------------

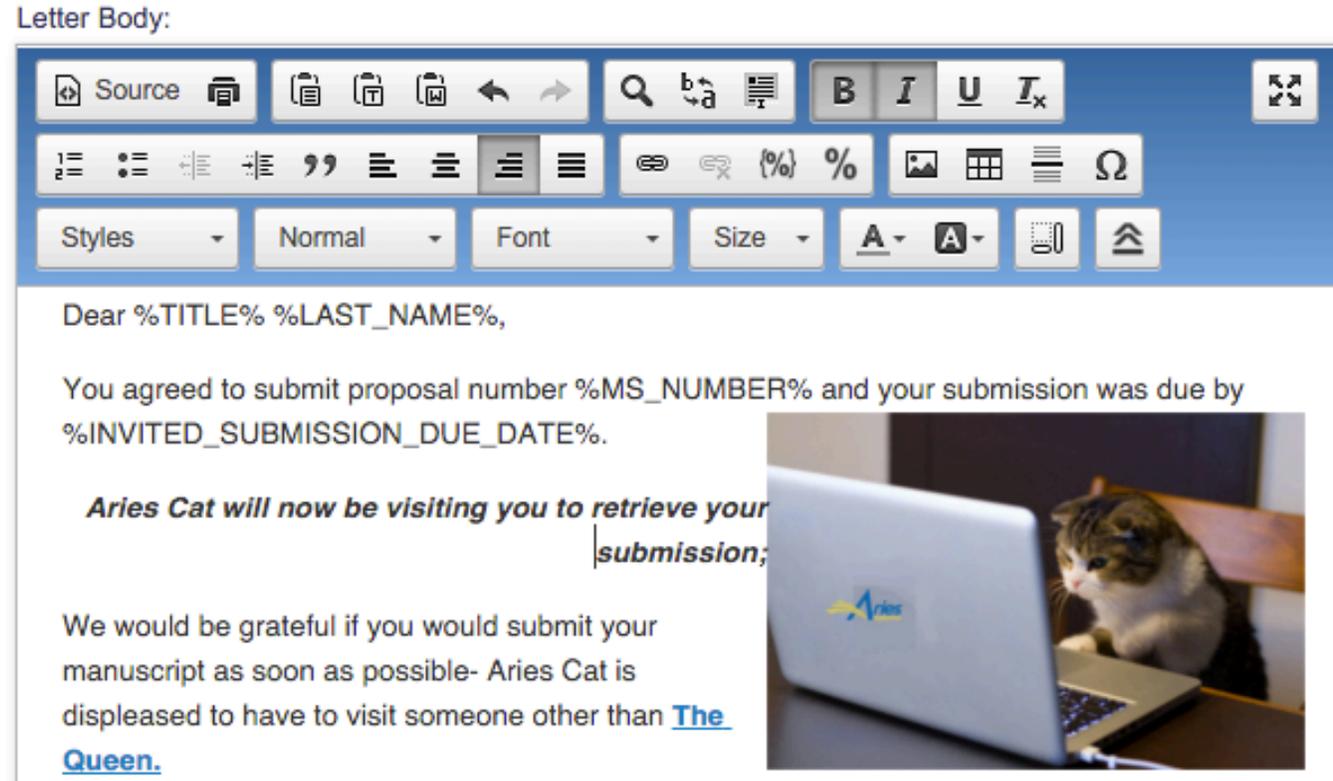
Rich Text Letters, Editing & Formatting

Personalise Your Communication!

Rich Text Letters, Editing & Formatting

- Using Rich Text Formatting and HTML in your letters allows greater customisation of your letter templates.

Letter Body:



The screenshot shows a rich text editor interface with a blue header bar containing various formatting tools. Below the header, the letter body contains several paragraphs of text with placeholders and a bolded italicized line. A small image of a cat sitting at a laptop is positioned on the right side of the letter body.

Dear %TITLE% %LAST_NAME%,

You agreed to submit proposal number %MS_NUMBER% and your submission was due by %INVITED_SUBMISSION_DUE_DATE%.

Aries Cat will now be visiting you to retrieve your submission;

We would be grateful if you would submit your manuscript as soon as possible- Aries Cat is displeased to have to visit someone other than [The Queen.](#)



Adding Images & links etc. Into Letters

Further Customisation Options

Adding Images Into Letters

System Admin > Policy Manager > Edit Letters > Edit Image Files for Letters

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	General	Author - Notify Other Authors	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Author - Other Author Verification Reminder	Author Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

Author Approve Cha

Author Changed Inv
Date Confirmation

Author Instructions
Date

Author Invitation for
Commentary

Author Invitation for

Author Letter for Inv
for Book Review

Author Notice - Tech
Check failure

Edit Image Files for Letters

Click 'Upload New Image File' to add a new image. Click 'Edit' to change the image description.

[Upload New Image File](#)

[Close](#)

File Name	Image Description		Actions
logo.jpg	EM logo		Download Edit/Replace
arieslogo.png	Aries Logo		Download Edit/Replace
ariescat-1.jpg	Aries Cat		Download Edit/Replace

- Here you can add/edit image files to include in letters.
- Editing an image file will update that image in all letters that contain it

Adding Images Into Letters

System Admin > Policy Manager > Edit Letters > Edit Image Files for Letters

Upload New Image File

Enter a Description, Browse and **Upload This File** to store an image file for later use in letters. The recommended file size is 50 KB or less.

[Insert Special Character](#)

Description:

Maximum 40 characters, no duplicates allowed.

File Name:

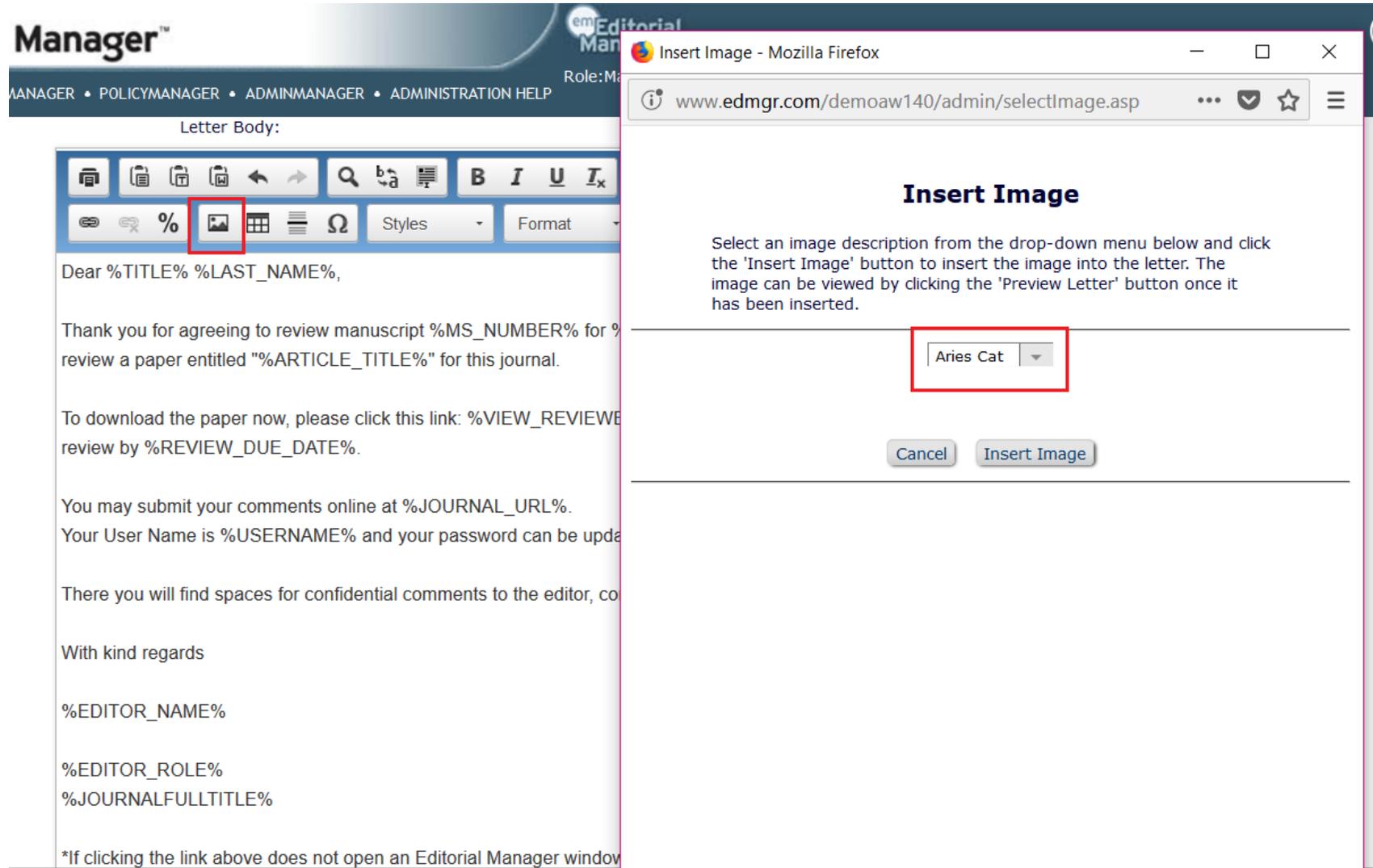
Edit Image Files for Letters

Click 'Upload New Image File' to add a new image. Click 'Edit' to change the image description.

File Name	Image Description		Actions	
logo.jpg	EM logo		Download	Edit/Replace
arieslogo.png	Aries Logo		Download	Edit/Replace
ariescat-1.jpg	Aries Cat		Download	Edit/Replace

Adding Images Into Letters

System Admin > Policy Manager > Edit Letters > Edit Image Files for Letters



The screenshot displays the Editorial Manager interface. On the left, the 'Letter Body' editor is visible, featuring a rich text editor toolbar with various icons. The 'Insert Image' icon, which shows a picture of a landscape, is highlighted with a red box. The main text area contains a letter template with several placeholder fields: %TITLE%, %LAST_NAME%, %MS_NUMBER%, %ARTICLE_TITLE%, %VIEW_REVIEW%, %REVIEW_DUE_DATE%, %JOURNAL_URL%, %USERNAME%, %EDITOR_NAME%, %EDITOR_ROLE%, and %JOURNALFULLTITLE%. A note at the bottom states: '*If clicking the link above does not open an Editorial Manager window'.

On the right, a browser window titled 'Insert Image - Mozilla Firefox' is open, displaying the URL 'www.edmgr.com/demoaw140/admin/selectImage.asp'. The page content includes the heading 'Insert Image' and the following instructions: 'Select an image description from the drop-down menu below and click the 'Insert Image' button to insert the image into the letter. The image can be viewed by clicking the 'Preview Letter' button once it has been inserted.' Below the text is a drop-down menu with 'Aries Cat' selected, also highlighted with a red box. At the bottom of the dialog are two buttons: 'Cancel' and 'Insert Image'.

Adding HTML into Letters

HTML can be used for:

- Inserting formatting (bold text, coloured text, etc.)
- Inserting images
- Deep Links display as text links in HTML
- %PENDING_ASSIGNMENTS_DEEP_LINK
%
- <http://demosgg120/edmgr.com/1/asp?i=3328&1=L>
KOLO vs [Pending Assignments](#)

HTML Help!

HTML opening tag	HTML closing tag	
<code><a href target='_blank'></code>	<code></code>	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.
<code></code>	<code></code>	Defines bold text.
<code><blockquote></code>	<code></blockquote></code>	Displays an indented block surrounded by blank lines.
<code>
</code>		Inserts a single line break. No closing tag.
<code><caption></code>	<code></caption></code>	Defines a table caption. Valid only within <code><table></code> tags.
<code><div></code>	<code></div></code>	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.
<code></code>	<code></code>	Defines emphasized text (most browsers display in <i>italics</i>).
<code><h1></code>	<code></h1></code>	Defines HTML headings 1 (largest) through 6 (smallest).
<code><h6></code>	<code></h6></code>	
<code><hr></code>		Defines a thematic break in an HTML page. Used to separate content. No closing tag.
<code><i></code>	<code></i></code>	Defines a part of text in an alternate voice or mood. (Usually displayed in italic.)
<code></code>		Displays an image. The two attributes "src" and "alt" are required. For example: <code></code> (You need the full URL to put an image into an email.)
<code></code>	<code></code>	Defines a list item in an ordered, unordered, or directory list
<code><mark></code>	<code></mark></code>	Defines marked text (used to highlight parts of text). New in HTML5.
<code></code>	<code></code>	Defines an ordered (numbered) list, which is made up of List Item <code></code> tags.
<code><p></code>	<code></p></code>	Defines a paragraph.
<code><small></code>	<code></small></code>	Defines smaller text.
<code></code>	<code></code>	Used to group inline elements and to format them with CSS. Only inline CSS style declarations can be used in EM Emails.
<code></code>	<code></code>	Defines important text.
<code><sub></code>	<code></sub></code>	Defines subscripted text.
<code><sup></code>	<code></sup></code>	Defines superscripted text.
<code><table></code>	<code></table></code>	Defines a table. <code><td></code> and <code><tr></code> tags are used.
<code><td></code>	<code></td></code>	Defines a cell in a table. Used within <code><tr></code> tags.
<code><th></code>	<code></th></code>	Defines a header cell in a table. Used within <code><tr></code> tags.
<code><tr></code>	<code></tr></code>	Defines a row in a table. Used within <code><table></code> tags.
<code><u></code>	<code></u></code>	Represents some text that should be stylistically different from normal text, such as misspelled words or proper nouns in Chinese.
<code></code>	<code></code>	Defines an unordered (bulleted) list, made up of <code></code> items.

HTML Letters

System Admin > Policy Manager > Edit Letters

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	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Editor Agrees to Handle Assignment	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Editor Decision Rescinded	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Declined Revision Reinstated	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice All Reviews Complete	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Author Declines to Revise	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Completed Review	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice of Proxy Registration	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice of Review Assignment	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
Journal Office Notice Revised Submission	General	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

Merge Fields

Using Automatic Fields to Output Information in
letters

Letter Content:

Merge Fields

`%System_Custom_Deep%`

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

Merge Fields: Creating Custom Merge Fields

Policy Manager > Email and letter policies > Create 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

Edit Image Files for Letters

Custom Merge Fields	Actions
%CUSTOM_EEMUG2018%	View Content Edit Definition Edit Letter Templates Copy Remove

Sort In Alphabetical Order

Edit Image Files for Letters

Add New Field

[Back to PolicyManager](#)

Merge Fields: Creating Custom Merge Fields

Policy Manager > Email and letter policies > Create 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:

EEMUG2018

Maximum 256 alphanumeric characters and underscores allowed, no spaces

Content:

[Insert Image](#) [Insert Special Character](#)

Welcome to EEMUG 2018!

Merge Fields - %Deep_System_Custom%

Allow attachments

Allow sender to add Rich Text (HTML) formatting

Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

Letter Body:

Insert Custom Merge Field

Insert System Merge Field

You may submit your comments online at %JOURNAL_URL%. Your User Name is %USERNAME% and your password can be updated at: %PASSWORD%.

You can also submit your comments using this link: %REVIEWER_RECOMMENDATION_DEEP_LINK%

There you will find spaces for confidential comments to the editor, comments for the author and a report form to be completed.

With kind regards

%EDITOR_NAME%

%EDITOR_ROLE%

%JOURNALFULLTITLE%

%CUSTOM_EEMUG2018%

*If clicking the link above does not open an Editorial Manager window, your email program may have inserted some spaces and/or line markers into the link. Please open a browser window manually and copy and paste the entire link from the email into the url address box. The link starts with the letters "http" and ends with the letters "http://". (where X represents a number such as 0, 1, 2, etc.) Note that the end of the

System Merge Fields Link in Edit Letters

Insert System Merge Fields ✕

You can drag and drop merge fields from here to the letter Subject or Body. [\(more...\)](#)

Expand All | Collapse All

- %ABSTRACT%**
Abstract of the manuscript
- %ACCEPT_EDITOR_INVITATION%
- %ACCEPT_INVITATION%
- %ACCEPT_REVIEW_INVITATION%
- %ACCEPT_REVIEW_INVITATION_AND_VIEW_REVIEWER_PDF%
- %ACTUAL_TRANSFER_PUBLICATION_TITLE%
- %ADDRESS%
- %ADDRESS1%
- %ADDRESS2%
- %ADDRESS3%

Merge Fields – Example Email with Merge Fields & Deep Link

Review_Due.ics
596 bytes

Action Items + Get more add-ins

Thank you for agreeing to review manuscript **DEMO.2017.0007** for AW Demo 14.0.

I would be grateful if you would review a paper entitled "Check edit submission statuses" for this journal.

To download the paper now, please click this link: <http://demoaw140.edmgr.com/l.asp?i=62&l=FRAUVIHN> *

If possible, I would appreciate receiving your review by Nov 30, 2017.

You may submit your comments online at <http://demoaw140.edmgr.com/>. Your User Name is RosieReviewer and your password can be updated at <http://demoaw140.edmgr.com/l.asp?i=63&l=3UP2JOGV>.

You can also submit your comments using this link: <http://demoaw140.edmgr.com/l.asp?i=64&l=P88EEVDS>

There you will find spaces for confidential comments to the editor, comments for the author and a report form to be completed.

With kind regards

mary mary
Managing Editor
AW Demo 14.0

Welcome to EEMUG 2018!

Merge Fields – Example Email with Merge Fields & Deep Link

DEMO.2017.0007

AW Demo 14.0

Dear Reviewer,

Just as a reminder, your review of manuscript number DEMO.2017.0007 is due by Nov 30, 2017.

To access this submission please click this link to be brought to your Pending Assignments folder: [Pending Assignments](#)

Kind regards,

mary mary

Managing Editor

AW Demo 14.0

Welcome to EEMUG 2018!

Merge Fields – Deep Link Expiration

Policy Manager > Reviewer and Editor Form Policies> Reviewer Recommendation Policies> Set Pending Assignments Deep Link Expiration

- ⊕ Editor Assignment Policies
- ⊕ Suggest Editor Policies
- ⊖ 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](#)
- [Configure Editor Decision Phrases](#)
- [Create Editor Forms](#)
- [Configure Editor Forms](#)
- [Editor Manuscript Rating Question Configuration](#)
- [Configure Options for Review Rating](#)
- [Configure Automatic Withdrawal of Declined Revisions](#)

Merge Fields – Deep Link Expiration

Policy Manager > Reviewer and Editor Form Policies> Reviewer Recommendation Policies> Set Pending Assignments 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 Reviewer into their Pending Assignments folder on the Reviewer Main Menu.

Expire link after clicks

Expire link after days

Cancel

Submit

Email Autofill

Coming Soon in v14.1!

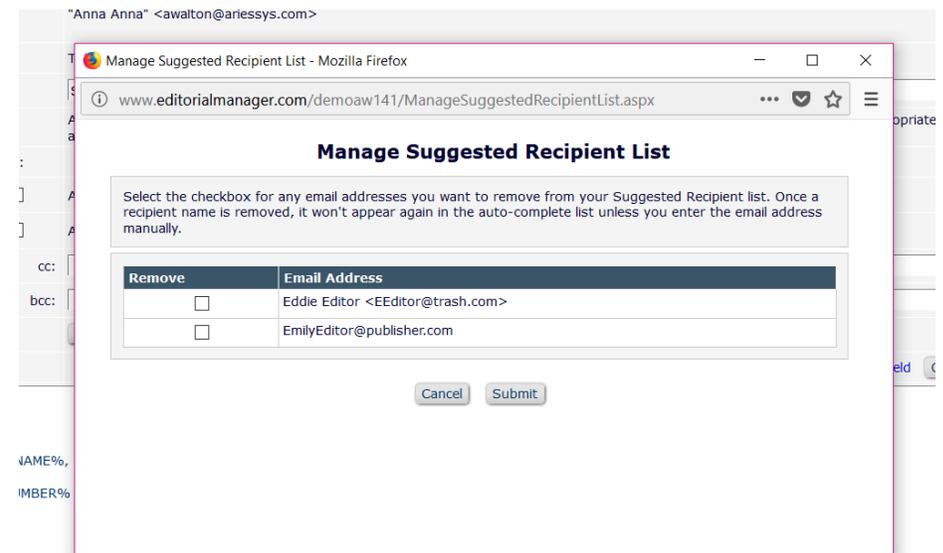
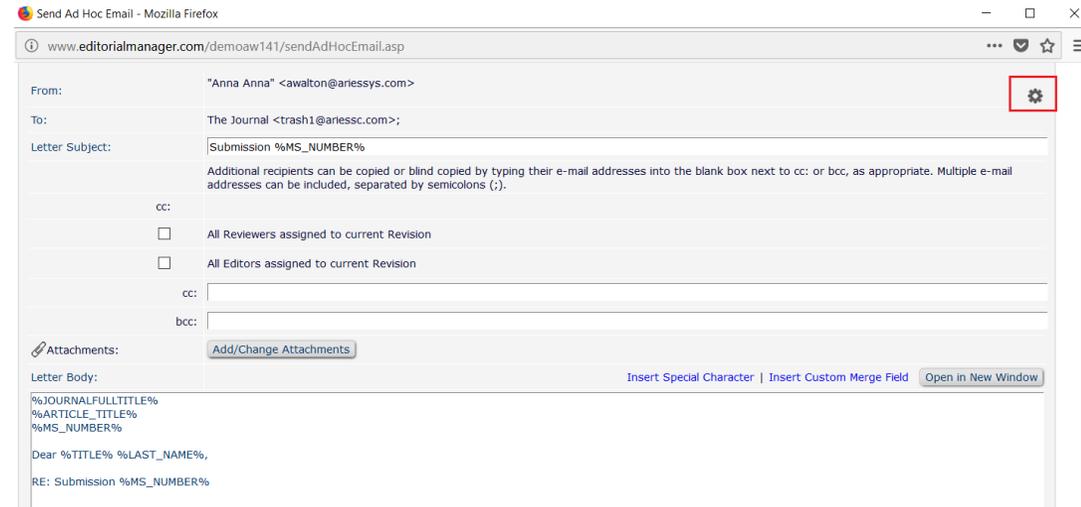
Email Autofill for Ad Hoc Letters

- Coming in version 14.1.
- Provides an auto-complete mechanism that quickly identifies and suggests recipients, based on the characters typed by the user and the frequency with which addresses are used.
- This will save the Editor from having to hunt elsewhere in EM for email addresses and to repeatedly type or copy/paste the same email address.
- It should also reduce the number of manual typing errors.
- Available for the Ad Hoc from Editor and Ad Hoc from Publisher letter families.
- To use Email Autofill, Editor and Publisher roles must have permission to send ad hoc email (in Role Manager).

The screenshot displays an email composition form. The 'From' field is set to "Anna Anna" <awalton@ariessys.com>. The 'To' field is set to "The Journal" <trash1@ariessc.com>. The 'Letter Subject' is "Submission %MS_NUMBER%". Below the subject, there is a note: "Additional recipients can be copied or blind copied by typing their e-mail addresses into the blank box next to cc: or bcc, as appropriate. Multiple e-mail addresses can be included, separated by semicolons (;).". The 'cc' field has two checkboxes: "All Reviewers assigned to current Revision" (unchecked) and "All Editors assigned to current Revision" (unchecked). A dropdown menu is open for the 'cc' field, showing "E" in the input box and a list of suggestions: "Eddie Editor <EEditor@trash.com>" and "EmilyEditor@publisher.com". A red box highlights the dropdown menu. Below the dropdown is an "Add/Change Attachments" button. The 'Attachments' section is empty. The 'Letter Body' field contains merge tags: "%JOURNALFULLTITLE%", "%ARTICLE_TITLE%", and "%MS_NUMBER%". At the bottom right, there are links for "Insert Special Character", "Insert Custom Merge Field", and an "Open in New Window" button.

Email Autofill for Ad Hoc Letters - Coming in version 14.1

- Similar behaviour to MS Outlook in providing email address suggestions.
- Does not have to be user in EM or tied to that submission.
- Each individual Editor/Publisher will have his/her own set of frequently used email addresses that builds over time.
- Once a user sends a letter to an email address, the address is added to a Suggested Recipient List for that user, which the system draws on later for the autofill function.
- Users can remove addresses from their lists (helpful if a contact's email address changes).
- Clicking the gear icon on the Customize Letter page opens a pop-up window, **Manage Suggested Recipient List**, where addresses can be selected and removed.



Email Autofill for Ad Hoc Letters - Coming in version 14.1

To Configure:

- No configuration is required, but letter settings must be configured to allow senders to enter free-form email addresses when customising a letter before sending (existing functionality).
- Go to Policy Manager > Email and Letter Policies > Edit Letters. Any letter in the Ad Hoc from Editor or Ad Hoc from Publisher family may be configured to allow this feature. Click the Edit link next to the applicable letter.
- On the Edit Letter page, in the Recipient section, check the box next to **“Display text box so sender can insert an email address.”**
- Additionally, in the Allow choice on Send Letter page check the settings (if desired) to display a text box for copied (cc and/or bcc) recipients.

Adding Recipients with the Envelope Icon

AKA A Quick Way to Send Ad Hoc Emails!

Adding Recipients with the Envelope Icon

System Admin > Policy Manager > Edit Letters

Recipient:

The Journal trash1@ariessc.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

Adding Recipients with the Envelope Icon

- Added in 12.2.
- More convenient way to send ad hoc letters to people associated with a submission.

Editors	
Name:	  Eddie Editor ▾ [Proxy]
Role:	Editor
Date Assigned:	Feb 28, 2017
Date Completed:	
Elapsed Days:	273
Recommendation:	

Reviewers	
Name:	  Reggie Reviewer (Reviewer) ▾ [Proxy]
Review Status:	Review Complete
Date Reviewer Invited:	Feb 28, 2017
Date Reviewer Agreed:	Feb 28, 2017
Date Review Due:	Mar 14, 2017
Date Review Completed:	Feb 28, 2017
Elapsed Days:	0
Recommendation:	Minor Revision

Name:	  Karen Little (Reviewer) ▾ [Proxy]
Review Status:	Agreed to Review
Date Reviewer Invited:	Feb 28, 2017
Date Reviewer Agreed:	Feb 28, 2017
Date Review Due:	<input type="text" value="03/14/2017"/>  (mm/dd/yyyy)
Elapsed Days:	273

Adding Recipients with the Envelope Icon

Send Ad Hoc Email

The journal has pre-configured one or more letters which you may use as a starting point. Select a letter, then click 'Customize Letter' to open the letter, insert your comments, and send the letter.

Please Choose a Letter

Send Ad Hoc Email

The journal has pre-configured one or more letters which you may use as a starting point. Select a letter, then click 'Customize Letter' to open the letter, insert your comments, and send the letter.

Please Choose a Letter

Please Choose a Letter

Ad Hoc From Editor

Author has requested Paper Status Update

Editor Note for Author

Reviewer Ad Hoc Reminder

Send Ad Hoc Email

The journal has pre-configured one or more letters which you may use as a starting point. Select a letter, then click 'Customize Letter' to open the letter, insert your comments, and send the letter.

Author has requested Paper Status Update

Cancel

Customize Letter

Adding Recipients with the Envelope Icon

Customize Letter - Author has requested Paper Status Update

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: "mary mary" <trash1@ariessc.com>

To: "Professor Eddie Editor" <EEditor@trash.com>;

Letter Subject: Submission %MS_NUMBER% - Author has requested a Status Update

cc:

All Editors assigned to current Revision

 Attachments:

[Add/Change Attachments](#)

Letter Body:

[Insert Special Character](#) | [Insert Custom Merge Field](#) [Open in New Window](#)

%MS_NUMBER%
%ARTICLE_TITLE%
Authors: %ALL_AUTHORS%
Corresponding Author Email Address: %CORRAUTHOR_EMAIL%

%TODAYS_DATE%

Dear %FIRST_AUTHOR% %LAST_NAME%,

The author of %MS_NUMBER% has contacted us and asked for an update on the status of their submission. Please can you contact him/her and let them know the latest update on the status?

Many Thanks,

%EDITOR_NAME%
%EDITOR_ROLE%

Adding Recipients with the Envelope Icon

- To allow publications to set up a 'blank' letter template (no Subject, empty body) for 'User Selects Recipient using  icon' letters, users are now able to save templates with an empty subject line.

Customize Letter - Blank Letter Template

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: "mary mary" <trash1@ariessc.com>
To: "Professor Eddie Editor" <EEditor@trash.com>;
Letter Subject:
Letter Body: [Insert Special Character](#) | [Insert Custom Merge Field](#) [Open in New Window](#)

Adding Recipients with the Envelope Icon

To Configure –

- Ad hoc letters must either be in the ‘Ad Hoc from Editor’ or ‘Ad Hoc from Publisher’ family to be eligible for use with this feature.
- Each letter to be used with the  icon must be configured in ‘Edit Letters’ to use the recipient option ‘User Selects Recipient using  icon’.
- The Editor or Publisher Role must have (existing) permission to ‘Send Ad Hoc E-mail’.
- The Editor or Publisher Role must have permission to send that particular Ad Hoc Email.

Letter Family: Ad Hoc From Editor

Editor Roles That Can Send This Letter: None Selected, ALL EDITOR ROLES (selected), Managing Editor, Editor, Editorial Assistant. Buttons: Select All, Clear All.

Sender's E-mail Address: Use E-mail address of user triggering the Correspondence, <awalton@ariessys.com>, <awalton@ariessys.com>

Recipient: awalton@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

Restrict Ad Hoc Emails to Certain Roles

- In Policy Manager > Email and Letter Policies > Edit Letters.
- For Ad Hoc From Editor and Ad Hoc From Publisher emails.
- Can select one or more (using ctrl & click) roles that can send the letter.
- Useful if vendors or suppliers have editor/publisher role as you can restrict ad hoc emails they can send.

Letter Purpose: Blank Letter Template

Subject:

Letter Family: Ad Hoc From Editor

Editor Roles That Can Send This Letter

None Selected	^	Select All
ALL EDITOR ROLES		
Managing Editor		
Editor		Clear All
Editorial Assistant	v	

Sender's E-mail Address

Use E-mail address of user triggering the Correspondence

<awalton@ariessys.com>

<awalton@ariessys.com>

Recipient:

awalton@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)

Rich Text Letter Formatting for Non HTML Letters

Allows Customisation on an Ad Hoc Basis

Rich Text Letter Formatting for Non HTML Letters

System Admin > Policy Manager > Edit Letters >

Editor can choose to send HTML letter in interface

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)

Allow attachments

Allow sender to add Rich Text (HTML) formatting

Selecting this option will allow a sender who is customizing the letter to switch the letter format from text to Rich Text (HTML) and add rich text formatting. Note: if the sender switches the format, the letter will be sent in Rich Text (HTML) format.

Letter Body:

[Insert Custom Merge Field](#) | [Insert System Merge Field](#)

Rich Text Letter Formatting for Non HTML Letters

System Admin > Policy Manager > Edit Letters >

To: Multiple addresses may be entered, separated by a semicolon

Letter Subject: Submission %MS_NUMBER%

Attachments: [Add/Change Attachments](#)

Letter Body: [Insert Special Character](#) | [Insert Custom Merge Field](#) | [Add Formatting](#) | [Open in New Window](#)

%JOURNALFULLTITLE%
%ARTICLE_TITLE%
%MS_NUMBER%

Dear %TITLE% %LAST_NAME%,

RE: Submission %MS_NUMBER%

Many Thanks and Best Wishes,

%EDITOR_NAME%
%EDITOR_ROLE%
%JOURNALFULLTITLE%
%CUSTOM_EEMUG2018%

To: Multiple addresses may be entered, separated by a semicolon

Letter Subject: Submission %MS_NUMBER%

Attachments: [Add/Change Attachments](#)

Letter Body: [Open in New Window](#)



%JOURNALFULLTITLE%
%ARTICLE_TITLE%



Rich Text Letter Formatting for Non HTML Letters

System Admin > Policy Manager > Edit Letters >

DEMO.2017.0007
Tea is Essential to Life!
AW Demo 14.0

Preview

Dear Dr. Reviewer,

Just as a reminder, your review of manuscript number DEMO.2017.0007 is due by **Nov 30, 2017**.



Aries Cat will now be visiting you to collect your review!

Please do not be late submitting your review, this makes Aries Cat sad... (and hungry!)

Aries Cat will pass on your review to [The Editor](#)... once he has had a wash, played with a feather and run from room to room for no apparent reason....

To access this submission please click this link to be brought to your **Pending Assignments folder**: [Pending Assignments](#)

Kind regards,

mary mary
Managing Editor
AW Demo 14.0

Welcome to EEMUG 2018!

DEMO.2017.0007
Tea is Essential to Life!
AW Demo 14.0

Received
Letter

Dear Dr. Reviewer,

Just as a reminder, your review of manuscript number DEMO.2017.0007 is due by **Nov 30, 2017**.



Aries Cat will now be visiting you to collect your review!

Please do not be late submitting your review, this makes Aries Cat sad... (and hungry!)

Aries Cat will pass on your review to [The Editor](#)... once he has had a wash, played with a feather and run from room to room for no apparent reason....

To access this submission please click this link to be brought to your **Pending Assignments folder**: [Pending Assignments](#)

Kind regards,

mary mary
Managing Editor
AW Demo 14.0

Welcome to EEMUG 2018!

Letter Inventory

Download a list of your letters &
search letter templates

Letter Inventory

Reports > General Data Export > Letter Inventory

Shows letters as configured

General Data Export

Choose the criterion for selecting records from Letter Inventory.

[Click here for more Help about this table](#)

[Insert Special Character](#)

[Help with Searching](#)

Criterion	Selector	Value
Letter Purpose	CONTAINS	
Letter Purpose	CONTAINS	
Letter Subject	CONTAINS	
Unique Letter ID		
From Editor		
Text Letter		
Rich Text (HTML) Letter Template		
Letter Format		
Letter Family ID		
Letter Custom Instructions		
Send To Journal		
Corresponding Editor		

in ASCENDING order.

General Data Export

To download a file of all letters:

Choose the criterion for selecting records from Letter Inventory.

[Click here for more Help about this table](#)

[Insert Special Character](#)

[Help with Searching](#)

Criterion	Selector	Value
Unique Letter ID	GREATER THAN OR EQUAL TO	0
Letter Purpose	CONTAINS	
Letter Purpose	CONTAINS	

First ORDER BY Letter Purpose in ASCENDING order.

Then ORDER BY Letter Purpose in ASCENDING order.

Create extraction data file for download

Show Summary Only

Letter Inventory

Reports > General Data Export > Letter Inventory

A	B	C	D	E	F
Letter Purpose	Letter Subject	Unique Letter ID	From Editor	Text Letter	Rich Text (HTML) Letter Template
Ad Hoc From Editor	Submission %MS_NUMBER%	123	FALSE	%JOURNALFULLTITLE% %ARTICLE_TITLE% %MS_NUMBE	%JOURNALFULLTITLE%
%ARTICLE_TITLE%&
Author - Other Author Verific	Please verify your contribution to %A	107	FALSE	Re: %ARTICLE_TITLE% by %CORRAUTHOR% Dear %TITL	Re: %ARTICLE_TITLE% by %CORR_AUTHOR% Dear %T
Author - Other Author Verific	Reminder - Please verify your contrib	118	FALSE	Re: %ARTICLE_TITLE% by %CORRAUTHOR% Dear %TITL	Re: %ARTICLE_TITLE% by %CORR_AUTHOR% Dear %T
Author Approve Changes	Author Approve Changes	56	FALSE	Dear %TITLE% %LAST_NAME%, Thank you for approving	Dear %TITLE% %LAST_NAME%, Thank you for approv
Author Changed Invited Due	Your invited submission revised due d	113	FALSE	Dear %TITLE% %LAST_NAME%, Thank you for agreeing to	Dear %TITLE% %LAST_NAME%, Thank you for agreeing
Author Instructions and Due	Thank you for agreeing to submit a pa	71	FALSE	Dear %TITLE% %LAST_NAME%, Thank you for agreeing to	Dear %TITLE% %LAST_NAME%, Thank you for agreeing
Author Invitation for Comme	You have been invited to submit a cor	67	FALSE	Dear %TITLE% %LAST_NAME%, You have been invited to	Dear %TITLE% %LAST_NAME%, You have been invited
Author Invitation for Proposa	You have been invited to submit a ma	68	FALSE	Dear %TITLE% %LAST_NAME%, You have been invited to	Dear %TITLE% %LAST_NAME%, You have been invited
Author Letter for Invitation fo	Invitation to submit a Book Review	98	FALSE	Dear %TITLE% %LAST_NAME%, You have been invited to	Dear %TITLE% %LAST_NAME%, You have been invited
Author Notice - Technical Ch	Your submission entitled %ARTICLE_T	42	FALSE	Dear %TITLE% %LAST_NAME%, Your submission entitled	Dear %TITLE% %LAST_NAME%, Your submission entitl
Author Notice - MS Outside o	Editorial office has returned your sub	97	FALSE	%TODAYS_DATE% Dear %TITLE% %REALNAME%: Your submission has been received by %JOURNALFULLTITLE%	
Author Notice Decision Resci	%MS_NUMBER%	102	FALSE	Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %CORRAUTHOR% %JOURNALFULLTITLE% Dear %TITLE% %L	
Author Notice Invitation Decl	You have declined an invitation to suk	83	FALSE	Dear %TITLE% %LAST_NAME%, This is to confirm that yo	Dear %TITLE% %LAST_NAME%, This is to confirm that
Author Notice of Manuscript	A manuscript number has been assign	41	FALSE	Dear %TITLE% %LAST_NAME%, Your submission entitled	Dear %TITLE% %LAST_NAME%, Your submission entitl
Author Notice Submission Re	Your submission to %JOURNALFULLT	82	FALSE	Dear %TITLE% %LAST_NAME%, Thank you for submitting	Dear %TITLE% %LAST_NAME%, Thank you for submitti
Author PDF Build Error	PDF Build Error	54	FALSE	Dear %TITLE% %LAST_NAME%, A pdf for your submissio	Dear %TITLE% %LAST_NAME%, A pdf for your submiss
Author Reinstates Revision	%MS_NUMBER% has been reinstated	60	FALSE	Dear %TITLE% %LAST_NAME%, Your submission entitled	Dear %TITLE% %LAST_NAME%, Your submission entitl
Author Reminder - Inv. Manu	Author Reminder - Inv. Manuscript - A	110	FALSE	Ref.: Proposal No. %MS_NUMBER% %ARTICLE_TITLE% %	Ref.: Proposal No. %MS_NUMBER% %ARTICLE_TITLE%
Author Reminder - Invited Ma	Author Reminder - Invited Manuscript	111	FALSE	%ARTICLE_TITLE% %JOURNALFULLTITLE% Dear %FIRST	%ARTICLE_TITLE% %JOURNALFULLTITLE% Dear %FIR
Author Reminder Inv. Manusc	Author Reminder Inv. Manuscript - Be	109	FALSE	%JOURNALFULLTITLE% Ref.: Proposal No. %MS_NUMBE	%JOURNALFULLTITLE% Ref.: Proposal No. %MS_NUM
Author Requests Deadline Ext	Please extend due date for %ARTICLE	87	FALSE	Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %COR	Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %C
Author Requests Deadline Ext	Please extend due date	88	FALSE	Ref.: Parent Submission: TITLE_OF_PARENT_SUBMISSION	Ref.: Parent Submission: TITLE_OF_PARENT_SUBMISSIO
Author Revision First Remind	Your revision is due	65	FALSE	Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %JOU	Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %J
Author Revision Subsequent F	Your revision is past due	66	FALSE	Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %JOU	Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %J
Author Submits New Child M	Submission Confirmation for %ARTICI	74	FALSE	Dear %TITLE% %LAST NAME%. Your submission entitled	Dear %TITLE% %LAST NAME%. Your submission entitl

Correspondence History

See what has been sent

Correspondence History Table

Reports > General Data Export > Correspondence History

Shows what was sent

[Click here for more Help about this table](#), or click on a column header for help on a particular field.

Page: 1 of 1 (9 total records)

Display results per page.

Correspondence Date	Letter ID	Document Status ID	Operator ID	Document ID	Revision Number	People ID	Correspondence History ID	Correspondence Contents	Proxy Operator ID	Old People ID	Old Operator ID	HTML Rendering Flag	CC Email List	BCC Email List	Letter Body
12/12/2017 12:50:51	12	29	9	2	0	1	1166	To: "mary mary" trash1@ariessc.com From: "" awalton@ariessys.com Subject: %EDITOR_NAME% has made a Decision Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %CORRAUTHOR% %JOURNALFULLTITLE% Dear %TITLE% %LAST_NAME%, %EDITOR_NAME% has made a decision on manuscript %MS_NUMBER%. The decision is: %EDITOR_DECISION%. Click on this link to access the submission: %EDITOR_DEEP_LINK% Kind regards, %EDITOR_NAME% %EDITOR_ROLE% %JOURNALFULLTITLE%	1			False			Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %CORRAUTHOR% %JOURNALFULLTITLE% Dear %TITLE% %LAST_NAME%, %EDITOR_NAME% made a decision on manuscript %MS_NUMBER% decision is: %EDITOR_DECISION%. Click on this link to access the submission: %EDITOR_DEEP_LINK% Kind regards, %EDITOR_NAME% %EDITOR_ROLE% %JOURNALFULLTITLE%
12/12/2017 12:50:52	5	7	9	2	0	2	1167	To: "Amy Author" aauthor@trash.com From: "" awalton@ariessys.com Subject: Your Submission Ref.: Ms. No. DEMO.2017.0002 Test Title 2 AW Demo 14.0 Dear %TITLE% %LAST_NAME%, Reviewers have now commented on your paper. You will see that they are advising that you revise your manuscript. If you are prepared to undertake the work required, I would be pleased to reconsider my decision. For your guidance, reviewers' comments are appended below. If you decide to revise the work, please submit a list of changes or a	1			False			Ref.: Ms. No. DEMO.2017.0002 Test Title 2 AW Demo 14.0 Dear %TITLE% %LAST_NAME%, Reviewers have now commented on your paper. You will see that they are advising that you revise your manuscript. I would be pleased to reconsider my decision. For your guidance, reviewers' comments are appended below. If you decide to revise the work, please submit a list of changes or a

Search by date sent

Correspondence History Table

Reports > General Data Export > Correspondence History

Shows what was sent

Page: 1 of 1 (7 total records)

Display 500 results per page.

Correspondence Date	Letter ID	Document Status ID	Operator ID	Document ID	Revision Number	People ID	Correspondence History ID	Correspondence Contents	Proxy Operator ID	Old People ID	Old Operator ID	HTML Rendering Flag	CC Email List	BCC Email List	Letter Body	Letter Subject
08/31/2017 05:50:13	9	2	1	10	0	22	1117	To: "Amie Author" aauthor223@rest.com From: "The Journal" trash1@ariessc.com Subject: New Manuscript has been submitted Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %CORRAUTHOR% %JOURNALFULLTITLE% Dear %TITLE% %LAST_NAME%, A new manuscript has been submitted. %JOURNAL_URL% username: %USERNAME% password: %PASSWORD%				False			Ref.: Ms. No. %MS_NUMBER% %ARTICLE_TITLE% %CORRAUTHOR% %JOURNALFULLTITLE% Dear %TITLE% %LAST_NAME%, A new manuscript has been submitted. %JOURNAL_URL% username: %USERNAME% password: %PASSWORD%	New Manuscript has been submitted
09/26/2017 11:01:34	44	0	22	0	0	22	1124	To: "Amie Author" aauthor223@rest.com From: "The Journal" trash1@ariessc.com Subject: A new user has registered Dear %TITLE% %LAST_NAME%, A new user has registered on the EM system for %JOURNALFULLTITLE%. The new user is %NEWUSER_NAME%. Kind regards, %JOURNALFULLTITLE%				False			Dear %TITLE% %LAST_NAME%, A new user has registered on the EM system for %JOURNALFULLTITLE%. The new user is %NEWUSER_NAME%. Kind regards, %JOURNALFULLTITLE%	A new user has registered
11/23/2017 08:12:07	63	0	1	0	0	22	1134	To: "Amie Author" aauthor223@rest.com From: "The Journal" trash1@ariessc.com Subject: A new user has been proxy registered Dear %TITLE% %LAST_NAME%, A new user has been proxy-registered on the EM system for %JOURNALFULLTITLE%. The person who performed the proxy registration is %PROXY_REGISTRATION_OPERATOR%, %PROXY_REGISTRATION_EDITORROLE%				False			Dear %TITLE% %LAST_NAME%, A new user has been proxy-registered on the EM system for %JOURNALFULLTITLE%. The person who performed the proxy registration is %PROXY_REGISTRATION_OPERATOR%, %PROXY_REGISTRATION_EDITORROLE%. The new user is %NEWUSER_NAME%. Kind regards, %JOURNALFULLTITLE%	A new user has been proxy registered

Search by People ID (this ID was for Amie Author)

Shared Letters

Share letter templates and changes across
multiple sites

Shared Letters

Edit Letters

Master Site

This site is a master site for the Shared Letters feature. To share letters across all publications in a Shared Letters group, first add Subscriber Sites in AdminManager. Then, select the Share Letter checkbox for each letter template that you want to be available to subscriber sites, then click the 'Save Changes and Update Subscriber Sites' button. [\(more...\)](#)

[View Subscriber Sites](#)

[Back to PolicyManager](#)

Add New Letter

Save Changes and Update Subscriber Sites

Edit Image Files for Letters

Share Letter	Letter Purpose	Letter Family Group by:	ActionManager Roles and Events	Letter Format		
				Text	Rich Text (HTML)	All Formats
<input checked="" type="checkbox"/>	Transfer Letter	Transfer Letter		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	
<input checked="" type="checkbox"/>	Terminate Assignment	Terminate Assignments		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input checked="" type="checkbox"/>	Reviewer - Batch Late Review	Reviewer Reminders		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Reviewer - First Late Reminder	Reviewer Reminders		<input type="radio"/> Edit	<input type="radio"/> Edit	
<input type="checkbox"/>	Reviewer - Second Late Reminder	Reviewer Reminders		<input type="radio"/> Edit	<input type="radio"/> Edit	

- To allow sharing of letter templates between multiple sites.
- Designate a Master site and subscriber sites.
- Choose which letters are shared.

Edit Letters

Subscriber Site

This site is a subscriber site for the Shared Letters feature. Its master site is DEMOAW140.

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	Rich Text (HTML)	All Formats
	Ad Hoc From Editor S	Ad Hoc From Editor		<input type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
	Author - Other Author Verification S	General	Author - Notify Other Authors	<input type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
	Author - Other Author Verification Reminder S	Author Reminder		<input type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Approve Changes	General		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Changed Invited Due Date Confirmation	General	Author - Invited Submission Due Date Changed	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Instructions and Due Date	General	Author - Author Agrees to Invitation	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

Shared Letters – To Configure

1.

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

2.

Shared Letters Management - Master Site Confirmation

The Shared Letters feature has been enabled. The current site has been designated as a master site.

Click the 'Manage Subscriber Sites' link to add Subscriber sites.

After adding subscriber sites, go to 'PolicyManager - Edit Letters' to share letter templates and push them to all subscriber sites.

[Manage Subscriber Sites](#)

[Return to AdminManager](#)

To Configure:

- On your chosen Master site – Admin Manager, **Configure Shared Letters Management.**

3.

Manage Subscriber Sites

No subscriber sites have yet been added. To add a subscriber site, enter that site's publication code into the box (or a list of publication codes separated by semi-colons), and click the button 'Add New Subscriber Sites'.

Close

Additional Subscriber Sites (Enter Publication Codes):

Add New Subscriber Sites

Enter one publication code or a list of publication codes separated by semi-colons.

Close

Shared Letters – To Configure

4.

Edit Letters

This site is a master site for the Shared Letters feature. To share letters across all publications in a Shared Letters group, first add Subscriber Sites in AdminManager. Then, select the Share Letter checkbox for each letter template that you want to be available to subscriber sites, then click the 'Save Changes and Update Subscriber Sites' button. [\(more...\)](#)

[View Subscriber Sites](#)
[Back to PolicyManager](#)

[Add New Letter](#)
[Save Changes and Update Subscriber Sites](#)
[Edit Image Files for Letters](#)

Share Letter	Letter Purpose	Letter Family Group by:	ActionManager Roles and Events	Letter Format		
				Text	Rich Text (HTML)	All Formats
<input checked="" type="checkbox"/>	Transfer Letter	Transfer Letter		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	
<input checked="" type="checkbox"/>	Terminate Assignment	Terminate Assignments		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input checked="" type="checkbox"/>	Reviewer - Batch Late Review	Reviewer Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Reviewer - First Late Reminder	Reviewer Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Reviewer - Second Late Reminder	Reviewer Reminder		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

- In Edit Letters on your Master Site, select which letters should be shared.
- Save Changes and Update Subscriber Sites.

5.

Edit Letters

This site is a subscriber site for the Shared Letters feature. Its master site is DEMOAW140.

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	Rich Text (HTML)	All Formats
	Ad Hoc From Editor S	Ad Hoc From Editor		<input type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
	Author - Other Author Verification S	General	Author - Notify Other Authors	<input type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
	Author - Other Author Verification Reminder S	Author Reminder		<input type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Approve Changes	General		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Changed Invited Due Date Confirmation	General	Author - Invited Submission Due Date Changed	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide
<input type="checkbox"/>	Author Instructions and Due Date	General	Author - Author Agrees to Invitation	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove Hide

- In Edit Letters on your Subscriber Site, select which letters should be replaced with a shared letter.

Questions?