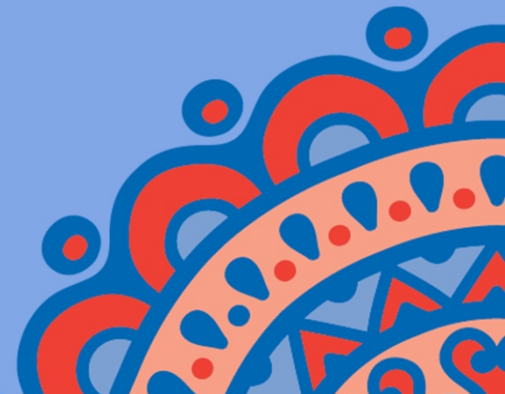*Welcome to*
EMUG 2016

em **Editorial Manager®** pm **ProduXion Manager®**

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Aries systems

Publish Faster. Publish Smarter.

The Joy of Letters

Steven Gain, Account Coordinator
sgain@ariessys.com

Agenda

o Configuring Letters
  o Letter Options
  o Shared Letter Templates
  o Letter Content Options
  o Rich Text (HTML) in Letters
o Attach Files to Letters
  o Attachments for Decision Letters
o Merge Fields and Deep Links
o Reviewer Notification Letters
o Managing External Correspondence
o Editing and Resending Letters
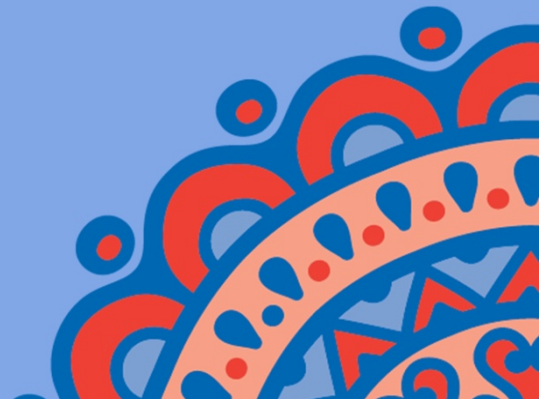
Creating and Configuring Letters

Letters = Communication

Letter Templates (Edit Letters)

Sort by Letter Purpose or Letter Family

Letter Configurations and Families

o Each Letter Family has different configuration options
  o Recipients – Individual Reviewer, All Reviewers, Corresponding Editor, Author, etc.
  o CC or BCC Recipients, Text box to enter email, Co-Authors
  o Sender – Publication email, Corresponding Editor, Handling Editor, etc.
  o Attachments - Available for all letter families except Batch emails

Letter Configurations and Families

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

Remove/Hide Letters

Hidden Templates are placed at the bottom of the page

Remove/Hide Letters

Warning Notice when Hiding/Removing a letter tied to an ActionManager Event

Warning! The letter 'Author Notice - Technical Check failure' is associated with ActionManager events. Please go to ActionManager and select another letter to be sent for the following event(s):

Submission Sent Back to Author

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

Cancel   Hide

The letter 'Author Notice - Technical Check failure' cannot be removed. It is associated with the ActionManager event 'Submission Sent Back to Author'. If you want to remove this letter, please go to ActionManager and select another letter to be sent at the event 'Submission Sent Back to Author'.

OK

ActionManager Column

Replace with Shared Letter	Letter Purpose ▲▼	Letter Family *Group by:* ▲▼	ActionManager Roles and Events	Letter Format				All Formats
				Text		**Rich Text (HTML)**		
☐	Welcome Letter - Go Live	Batch E-mail		◉	Edit	○	Edit	Remove | Hide
☐	Welcome	General	Author - New User Registers	◉	Edit	○	Edit	Remove | Hide
☐	Transfer Letter 2	Decision		◉	Edit	○	Edit	Remove | Hide
☐	Transfer Letter	Transfer Letter	Editorial Coordinator - Submission Transferred to Publication	◉	Edit	○	Edit	
☐	Terminate Assignment Ⓢ	Terminate Assignments		◉	Edit	○	Edit	Remove | Hide

You are about to proceed to ActionManager to configure letters for the 'Author' Role. This will abandon any unsaved changes you may have made (for example, to selected Letter Formats). Are you sure you wish to proceed? Press Cancel to return and Save any changes.

Cancel   Proceed to ActionManager

Shared Letter Templates

For Publishers with more than one site

Shared Letter Templates

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

Shared Letter Templates

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): EMUG2016   Add New Subscriber Sites

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

Close

Shared Letter Templates

Manage Subscriber Sites

Listed below are all the publications that are subscribers to this master site. The publications listed below, plus the current publication, are considered to be in the same 'Shared Letters Group'.

To add a new publication to the Shared Letters group, type that publication's code into the 'Additional Subscriber Sites' box (or a list of publication codes separated by semi-colons), and click the 'Add New Subscriber Sites' button. After all desired sites have been added using the 'Add New Subscriber Sites' button, click the Close button.

To unsubscribe a site, select the checkbox in the 'Terminate Subscriber Relationship' column and click the 'Terminate Selected Sites' button.

Close

Publication Code	Full Publication Title	Terminate Subscriber Relationship Select All/ Clear All
DEMOSGG122	SGG Demo 12.2	☐
DEMOTB122	TB Demo 12.2	☐

Terminate Selected Sites

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 Letter Templates

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	Letter Format Rich Text (HTML)	All Formats
☐	Proposal Ad Hoc	Ad Hoc For Proposal		⦿ Edit	◯ Edit	Remove | Hide
☐	Author Requests Deadline Extension on Revision	Ad Hoc From Author		◯ Edit	⦿ Edit	Remove | Hide
☐	Author Requests Deadline Extension on Submission	Ad Hoc From Author		⦿ Edit	◯ Edit	Remove | Hide
☐	Ad-hoc with password merge field	Ad Hoc From Editor		⦿ Edit	◯ Edit	Remove | Hide

Shared Letter Templates

Hidden Letters						
			Letter Format			
Letter Purpose ▲▼	**Letter Family** *Group by:* ▲▼	**ActionManager Roles and Events**	**Text**	**Rich Text (HTML)**	**All Formats**	
Terminate Assignment ⑤	*Terminate Assignments*		◉ Edit	○ *Edit*	Remove | Restore	
Proposal Ad Hoc	*Ad Hoc For Proposal*		◉ Edit	○ Edit	Remove | Restore	
AMS HTML2	*Batch E-mail*		○ Edit	◉ Edit	Remove | Restore	

Replace with Shared Letter	**Letter Purpose** ▲▼	**Letter Family** *Group by:* ▲▼	**ActionManager Roles and Events**	**Letter Format**			
				Text	**Rich Text (HTML)**	**All Formats**	
☐	Welcome Letter - Go Live	Batch E-mail		◉ Edit	○ Edit	Remove | Hide	
☐	Welcome	General	Author - New User Registers	◉ Edit	○ Edit	Remove | Hide	
☐	Transfer Letter 2	Decision		◉ Edit	○ Edit	Remove | Hide	
☐	Transfer Letter	Transfer Letter	Editorial Coordinator - Submission Transferred to Publication	◉ Edit	○ Edit		
	Terminate Assignment ⑤	Terminate Assignments		◉ Edit	○ *Edit*	Remove | Hide	

Shared Letter Templates

Replace with Shared Letter

Listed below are all the letter templates that you have selected to be replaced by a Shared Letter template. Replacing an existing letter template with a shared letter template will hide the existing letter template. If the existing letter template is associated with an ActionManager event or Editor Decision Term, the replacement letter will automatically be associated with the same ActionManager event or Editor Decision Term, and the existing letter template will no longer be associated with it.

To replace an existing letter template with a shared letter template, select the appropriate shared letter template from the drop-down list. When you have finished making all selections, click the Submit button.

Cancel   Submit

Letter Purpose	Letter Family	Replace with:
Terminate	TerminateAssignments	Please Choose ▼

Cancel   Submit

Options when creating Letters

Sender, Recipients, Attachments and more!

Creating Letter Templates

Edit 'General' Letter

[Cancel] [Save]

Custom Instructions

[text area]

View Default Instructions   Revert to Default Instructions

Letter Purpose: Reviewer Unassigned after Accepting Invitation

Subject: Your services on %MS_NUMBER% are no longer required

Letter Family: General ▼

Sender's E-mail Address
- ● "12.2 Demo" <steven_gain@hotmail.com>
- ○ Use Corresponding Editor's E-mail address
- ○ Use Corresponding Production Editor's E-mail address

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

Automatically cc: bcc:
- ☐ ☐ All Co-Authors
- ☐ ☐ Corresponding Editor
- ☐ ☐ Corresponding Production Editor

Send copies to the following addresses:
(Multiple addresses may be entered, separated by a semicolon)
- ☐ cc: [   ]
- ☐ bcc: [   ]

Creating Letter Templates

Allow choice on 'Send Letter' page The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:
☐   ☐   Display checkbox for co-Authors

☐ 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

```
Dear %TITLE% %LAST_NAME%,

Your services as a Reviewer are no longer required on manuscript "%ARTICLE_TITLE%", %MS_NUMBER%
for %JOURNALFULLTITLE%.

Thank you for your past efforts.  I hope that we may utilize your services in the future.

Kind Regards,

%EDITOR_NAME%
%EDITOR_ROLE%
%JOURNALFULLTITLE%
```

Cancel   Save

Creating Ad Hoc Letter Templates

Letter Family: **Ad Hoc From Editor** ▼

Editor Roles That Can Send This Letter

None Selected
ALL EDITOR ROLES
Editor in Chief
Associate Editor
Editorial Coordinator ▼

Select All

Clear All

Sender's E-mail Address
- ⦿ Use E-mail address of user triggering the Correspondence
- ○ "12.2 Demo" <sgain@ariessys.com>
- ○ "12.2 Demo" <sgain@ariessys.com>

Recipient:
- ☐ "12.2 Demo" sgain@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

Creating Ad Hoc Letter Templates

Additional Recipients

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

Automatically cc: bcc:

☑ ☐ All Co-Authors

☐ ☐ Corresponding Editor

☐ ☐ Corresponding Production Editor

Send copies to the following addresses:
(Multiple addresses may be entered, separated by a semicolon)

☐ cc: [ ]

☐ bcc: [ ]

Allow choice on 'Send Letter' page The following options will allow the sender to choose whether to send carbon copies (cc:) or blind carbon copies (bcc:) to the designated group of people. Selecting these options does not automatically cc: or bcc: the indicated recipients.

cc: bcc:

☑ ☐ Display checkbox for co-Authors

☐ ☐ Display checkbox for Reviewers assigned to current Revision

☐ ☐ Display checkbox for Editors assigned to current Revision

Display e-mail entry box on 'Send Letter' page:

☐ cc:(Allow sender to manually enter cc: recipients)

☐ bcc:(Allow sender to manually enter bcc: recipients)

☑ Allow attachments

Creating Ad Hoc Letter Templates

Details Page

Rich Text (HTML) Letters

o HTML can be used for:

    o Inserting formatting (bold text, colored text, etc.)

    o Inserting images

o Deep Links display as text links in HTML

    o %PENDING_ASSIGNMENTS_DEEP_LINK%

    o http://demosgg122/edmgr.com/l/asp?i=3328&1=LKOLO
       vs <u>Pending Assignments</u>

Rich Text (HTML) Letters

Replace with Shared Letter	Letter Purpose	Letter Family *Group by:* ▲ ▼²	ActionManager Roles and Events	Letter Format			All Formats
				Text	**Rich Text (HTML)**		
☐	Ad Hoc E-mail from EA to Reviewers (HTML)	Ad Hoc From Editor		○ Edit	◉	Edit	Remove | Hide
☐	Ad Hoc From Author	Ad Hoc From Author		○ Edit	◉	Edit	Remove | Hide
☐	Ad-Hoc From Editor - Allow Rich Text	Ad Hoc From Editor		○ Edit	◉	Edit	Remove | Hide
☐	AE Notification of Invited Author	General	Associate Editor - Solicit Commentary on Submission	○ Edit	◉	Edit	Remove | Hide
☐	AMS HTML	Batch E-mail		○ Edit	◉	Edit	Remove | Hide

Rich Text (HTML) Letters

Rich Text (HTML) Letters

Replace with Shared Letter	Letter Purpose	Letter Family *Group by:*	ActionManager Roles and Events	Letter Format			All Formats
				Text	**Rich Text (HTML)**		
☐	Ad Hoc E-mail from EA to Reviewers (HTML)	Ad Hoc From Editor		○ Edit	◉	Edit	Remove | Hide
☐	Ad Hoc From Author	Ad Hoc From Author		○ Edit	◉	Edit	Remove | Hide
☐	Ad-Hoc From Editor - Allow Rich Text	Ad Hoc From Editor		○ Edit	◉	Edit	Remove | Hide
☐	AE Notification of Invited Author	General	Associate Editor - Solicit Commentary on Submission	○ Edit	◉	Edit	Remove | Hide
☐	AMS HTML	Batch E-mail		○ Edit	◉	Edit	Remove | Hide

Add New Letter   Save Changes   Edit Image Files for Letters   Replace Selected Letters with Shared Letters

Rich Text (HTML) 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: [Choose File] No file chosen

[Cancel] [Upload This File]

Rich Text (HTML) in Text Letters

Rich Text (HTML) in Text Letters

Attaching Files to Letters

Letters and automatic attachments for decision letters

Attaching Files to Letters

Customize Letter - General Email to Author

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

[Cancel]   [Preview and Send]

From: "12.2 Demo" <sgain@ariessys.com>

To: Corresponding Author;

Letter Subject: Email to Author

Attachments: [Add/Change Attachments]

Letter Body: [Open in New Window]

Attachments

Attaching Files to Letters

Attaching Files to Letters

Customize Letter - General Email to Author

Type any desired text into the 'Letter Body' area. Click 'Open in New Window' if you need extra space to enter your letter. To send the e-mail, click the 'Preview and Send' button, proofread the letter and click the 'Send' button on that page. Note: Any text bounded by % signs is a 'merge field' which will be populated with the appropriate information when the letter is sent.

Cancel   Preview and Send

From: "12.2 Demo" <sgain@ariessys.com>

To: Corresponding Author;

Letter Subject: Email to Author

Attachments: DEMOSGG-16-89-Original_Submission-Reviewer_Version.pdf
                manuscript.docx
                Add/Change Attachments

Letter Body: Open in New Window

Attachments

Attachment Configuration

PolicyManager Main Menu

Expand All　　　Collapse All

⊞ Registration and Login Policies
⊞ Status Policies
⊞ Submission Policies
⊞ Questionnaire Policies
⊞ Additional Data Policies
⊞ Editor Assignment Policies
⊞ Reviewer and Editor Form Policies
⊞ E-mail and Letter Policies
⊞ General Policies
⊞ Discussion Forums
⊞ Linked Submissions Policies
⊞ Conference Submission Policies
⊞ Transmittal Policies
⊟ ProduXion Manager
　　Configure Attachment Security
　　Edit Instructions for Attachments
　　Set Attachments Deep Link Policy

Attachment Sanitization

Sanitization

Files uploaded by Editors and Reviewers as part of their work on the submission ("Attachments") may be made available to the Author and other Reviewers. Check the box below and click the 'Submit' button to "sanitize" these files by removing identifying information from the 'File Properties' and 'Track Changes' features of Microsoft Office files, and the 'Properties' of PDF files. PDF annotations (with the exception of dynamic stamps) are also sanitized. Note: any personal identifying information included in the actual text of the file must be removed manually.

If sanitization is enabled, Authors will only have access to the sanitized version of the Attachments. Editors will have access to both the original and sanitized files. Reviewers will have access to the original files unless the checkbox 'Allow other Reviewers access only to Attachments with personal information removed' is selected.

Important Notes: Any Attachments which are not in Microsoft Office or PDF format will not have identifying information removed. Microsoft Office files include Word, Excel, and PowerPoint.

If the checkboxes are unchecked, Authors and/or Reviewers will only have access to the original (unsanitized) files, even if sanitized files have been created.

☑ Remove Personal Information from Editor/Reviewer Attachments in Microsoft Office or PDF format.

☑ Allow other Reviewers access only to Attachments with personal information removed.

Attachment Availability

Availability

Select the applicable option(s) below to designate all uploaded Editor/Reviewer Attachments as available to the Author and/or Reviewers by default. The availability of individual files can also be set manually at various access points throughout the system.

A Reviewer always has access to files he or she uploaded, but if a file is marked as "Available to Reviewers" it will also be available to other Reviewers of the same submission.

	Author	Reviewers
Designate **Editor**-uploaded files as available by default to:	☑	☐
Designate **Reviewer**-uploaded files as available by default to:	☑	☐

Attaching Files to Decision Letters

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

The following files can be made available to the Author. If the 'Allow Author Access' checkbox is selected, the file will be available to the Author. If the 'Allow Author Access' checkbox is NOT selected, the file will not be available to the Author.

Attachments:

Action	Uploaded By	Description	File Name	Size	Upload Date	Allow Author Access
Revision 1						
Download Download Sanitized Copy	Steven Gain (Editor)	Attachment for Author	ReviewerPDF.pdf	566 KB	06/06/2016	☑

[Upload Attachments]

[Cancel] [Submit Decision without Notifying Author]

[Preview Letter] [Save] [Save and Close] [Send Now]

Merge Fields and Deep Links

Using automatic fields to output information in letters

Merge Fields and Deep Links

- System Merge Fields and Custom Merge Fields
    - Pull in information about the submission and/or Authors, Reviewers and Editors
    - Create your own custom merge fields
- Deep Linking Merge Fields
    - Merge as a link in letters
    - Brings recipient to locations in the system
    - Allows recipients to accept or decline invitations directly from email

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_EMUG%	View Content Edit Definition Edit Letter Templates Copy Remove

Sort In Alphabetical Order   Edit Image Files for Letters

Add New Field

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:

EMUG2016

Maximum 256 alphanumeric characters and underscores allowed, no spaces

Content: Insert Image Insert Special Character

Custom Merge Field for EMUG 2016

Custom Merge Fields

Custom Merge Fields

Preview Letter – General Email to Author

Cancel   Print   Send E-Mail

Custom Merge Field for EMUG 2016

Cancel   Print   Send E-Mail

System Merge Fields
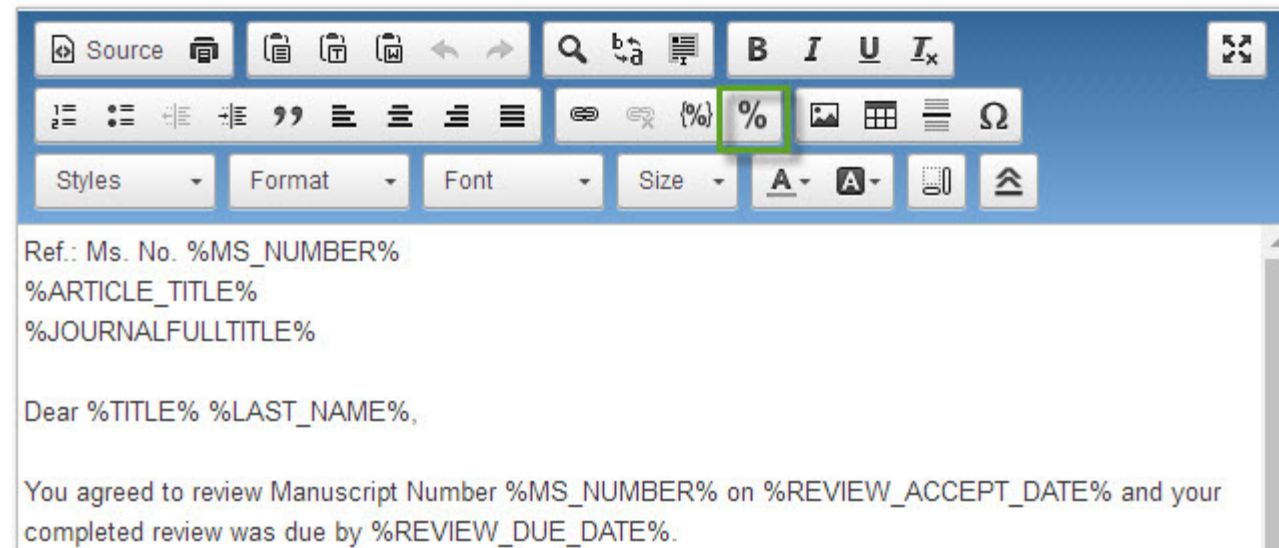
Letter Body: Insert Custom Merge Field | Insert System Merge Field

Ref.: Ms. No. %MS_NUMBER%
%ARTICLE_TITLE%
%JOURNALFULLTITLE%

Dear %TITLE% %LAST_NAME%,

You agreed to review Manuscript Number %MS_NUMBER% on %REVIEW_ACCEPT_DATE% and your completed review was due by %REVIEW_DUE_DATE%.

Your review is now %REVIEW_DAYS_LATE% days late. Therefore I would be grateful if you would submit your review as soon as possible at %JOURNAL_URL%.

Ref.: Ms. No. %MS_NUMBER%
%ARTICLE_TITLE%
%JOURNALFULLTITLE%

Dear %TITLE% %LAST_NAME%,

You agreed to review Manuscript Number %MS_NUMBER% on %REVIEW_ACCEPT_DATE% and your completed review was due by %REVIEW_DUE_DATE%.

System Merge Fields

How Merge Fields are Displayed

Preview Letter - Reviewer Reminder - Before Agree or Decline

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

Close

DEMOSGG-16-89
Full Submission
SGG Demo 12.2

Dear Dr Tassi,

On 06/07/2016 we sent you a request to review a paper title Full Submission.

We have not yet received a response from you, possibly because the original invitation went astray. We would be grateful if you could let us know if you can carry out this review.

If you would like to review this paper, please click this link: Agree to Review

If you do not wish to review this paper, please click this link Decline to Review

If possible, I would appreciate receiving your review by 06/21/2016.

Kind regards,

Steven Gain
Editor in Chief
SGG Demo 12.2
Custom Merge Field for EMUG 2016

Reviewer Deep Link Expiration

Editor and EAR Deep Link Expiration

General Policies

Set Manuscript Number Type

Set Manuscript Number Revision Suffix

Set Date Format

Set Time Zone Display Policy

Configure Unavailability Check and Instructions

Set ISO Country Standard

Configure General Due Date Preferences

Set Reviewer Preferences

Configure Electronic Calendar Due Date Preferences

Set Editor Deep Link Expiration

Set Enterprise Analytics Reporting Deep Link

Define Details Page Layouts

Set Update Information Deep Link Expiration

Create Customized Submission Flags

Create Customized People Flags

Edit Production Notes Instructions

Edit Alternate Contact Notes Instructions

Customize Author Main Menu Instructions

Configure Personal Classification Rankings

Customize Reviewer Selection Summary Instructions

Enable Institution Name Normalization

%EDITOR_DEEP_LINK%

This deep link is related to a specific submission. It carries out a full login and takes the Editor to a Search Results Page displaying the associated submission.

☑ Expire link after [1] clicks

☐ Expire link after [ ] days

%EDITOR_MAIN_MENU_DEEP_LINK%

This deep link carries out a full login and takes the Editor to the Editor Main Menu.

☑ Expire link after [1] clicks

☐ Expire link after [ ] days

%EDITOR_NEW_INVITATIONS_FOLDER_DEEP_LINK%

This deep link carries out a full login and takes the Editor to the New Invitations folder.

☑ Expire link after [1] clicks

☐ Expire link after [ ] days

%EDITOR_NEW_ASSIGNMENTS_FOLDER_DEEP_LINK%

This deep link carries out a full login and takes the Editor to the New Assignments folder.

☑ Expire link after [1] clicks

☐ Expire link after [ ] days

%EDITOR_REQUIRED_REVIEWS_COMPLETE_FOLDER_DEEP_LINK%

This deep link carries out a full login and takes the Editor to the Submissions with Required Reviews Complete folder.

☑ Expire link after [1] clicks

☐ Expire link after [ ] days

Reviewer Notification Letters

Create in "Reviewer Notification" Family and configure by Decision Term

Reviewer Notification Letters

Reviewer and Editor Form Policies

Manuscript Rating Question Configuration
Edit Manuscript Rating Questions
Overall Manuscript Rating Question Settings
Edit Manuscript Rating Instructions

Reviewer Recommendation Policies
Edit Reviewer Recommendation Terms
Create/Edit Custom Review Questions
Create/Edit Review Forms
Match Review Forms to Article Types and Reviewer Roles
Set Pending Assignments Deep Link Expiration
Set Reviewer Recommendation Deep Link Expiration

Editor Decision Policies
Edit Editor Decision Terms
Create Editor Forms
Configure Editor Forms
Editor Manuscript Rating Question Configuration
Configure Options for Review Rating
Configure Automatic Withdrawal of Declined Revisions

Reviewer Notification Letters

Reviewer Notification Letters

Reviewer Notification Letters

Notify Author

Manuscript Number:
DEMOSGG-000008

Title: Reviewer Notification
Letter - EMUG 2016

To finalize your decision and
notify the author, use the
'Send Now' button.

If you wish to submit your
decision to the next editor for
review before the author is
notified, use the 'Submit
Decision without Notifying
Author' button.

Cancel | Submit Decision without Notifying Author

Preview Letter | Save | Save and Close | Send Now

Editor Decision:	Accept
Modify Decision:	Accept ▼
From:	"12.2 Demo"<sgain@ariessys.com>
To:	John Carnevale
Modify Letter:	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

☐ ☐ Lisa Gosselin (Associate Editor)

Reviewer Notification Letters

Reviewer Notification Letters
Manuscript Number: DEMOSGG-000008 "Reviewer Notification Letter - EMUG 2016"

The following Reviewers have submitted reviews for this manuscript. Click the link in the Reviewer Notification Letter column if you want to customize a particular letter. Once you have customized a letter, an asterisk is displayed next to the person's name. If you do not explicitly customize the letter for a particular person, the default letter will be sent.

If there is a person in the list to whom you do not want to send a letter, check the "Do Not Send Letter" box next to that person's name. When you click "Send All Letters", that person will not be sent a letter.

[Continue Without Sending Any Reviewer Letters]   [Send All Letters]

Reviewer	Manuscript Number	Revisions Reviewed	Article Title	Reviewer Notification Letter	Do Not Send Letter
Trevor Barker (Reviewer)	DEMOSGG-000008	Original Submission	Reviewer Notification Letter - EMUG 2016	Reviewer Notification of Accept Decision	☐
Scott Farmer (Reviewer)	DEMOSGG-000008	Original Submission	Reviewer Notification Letter - EMUG 2016	Reviewer Notification of Accept Decision	☐

[Continue Without Sending Any Reviewer Letters]   [Send All Letters]

Managing External Correspondence

Using Editorial Manager as a complete Audit Trail for all correspondence

Managing External Correspondence

o Users will sometimes provide information to the publication outside of Editorial Manager

o EM has two ways to add external information to the Correspondence History

- o Manual
- o Automated

Managing External Correspondence

o Add/Edit External Correspondence

o If Attachments feature is enabled

    o Add Attachments to External Correspondence

    o RoleManager Permission – General Searching and Viewing

☑ Add/Edit External Correspondence
    ☑ Add Attachments to External Correspondence

Managing External Correspondence

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Automatic Import via Email Drop-Box

o Allows e-mail responses to letters originating from EM to be imported into the Correspondence History of the related submission

o Emails to be imported are forwarded to a unique drop box e-mail address created by Editorial Manager

o Emails are matched to the correct submission using a unique identifier (EMID) that is inserted into to subject line of outgoing emails

Managing External Correspondence

EMID for Email Import of external correspondence

o What is an EMID?
  o A unique code appended to the subject line of an email
  o Example: [EMID:ed06f6b074241c34]
  o Used to link external email to EM submission
  o Must have an EMID in subject line to be properly ingested

o Configured in PolicyManager

Managing External Correspondence

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

Managing External Correspondence

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

[Generate New Address]   [Clear Address]

Once activated, the system will attempt to import Email sent to the 'Drop-Box' address. If this import fails, and the mail subject line contains a valid import identifier code created by EM, then the system can forward the failed Email to a contact address for notification. To enable failure notifications, type in the desired Email address below. Delete this address to disable this feature.

Set Email Address for Failure Notifications:

sgain@ariessys.com

[Cancel]   [Submit]

Return to PolicyManager

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Editing and Resending Letters

Editing and Resending Letters

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

Editing and Resending Letters

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CORRESPONDENCE HISTORY

Add Editorial Correspondence

Correspondence Date	Letter		Recipient	Status	Revision	Operator
06/06/2016	General Email to Author		Jeff Tassi, MD	Under Review	0	Steven Gain
06/06/2016	Imported E-mail (External)	Remove Edit				
06/06/2016	General Email to Author		Jeff Tassi, MD	Under Review	0	Elisha Daley [Proxied by Steven Gain]