



*Welcome to*  
**EMUG 2016**

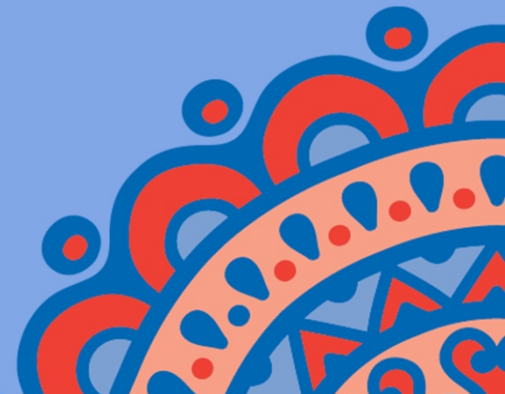
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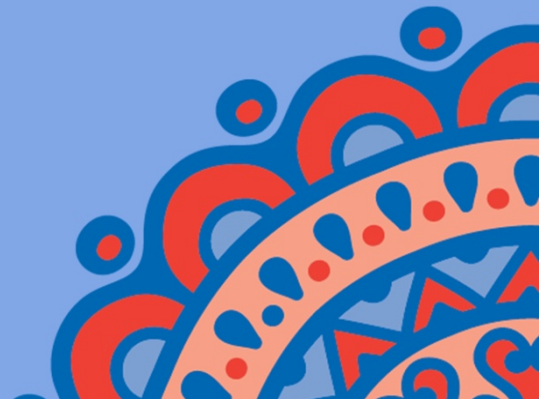
# The Joy of Letters

**Steven Gain**, Account Coordinator  
sgain@ariessys.com



# Session Title Goes Here

Session Subtitle Goes Here



# Agenda

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

# Creating and Configuring Letters

Letters = Communication

# Letter Templates (Edit Letters)

Sort by Letter Purpose or Letter Family

## Edit Letters

This site is a subscriber site for the Shared Letters feature. Its master site is DEMODK122.

The master site may have already subscribed this site to shared letter templates. If so, these are designated with a  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
<input type="checkbox"/>	Ad Hoc From Author	Ad Hoc From Author		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Author Requests Deadline Extension on Revision	Ad Hoc From Author		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Author Requests Deadline Extension on Submission	Ad Hoc From Author		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Ad Hoc E-mail from EA to Reviewers (HTML)	Ad Hoc From Editor		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Ad-Hoc From Editor - Allow Rich Text	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide

# Letter Configurations and Families

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

# Letter Configurations and Families

- 23 Letter Families
  - Used to organize letters
- 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

<input type="checkbox"/>	Ad Hoc From Author	Ad Hoc From Author		<input type="radio"/>	Edit	<input checked="" type="radio"/>	Edit	Remove   Hide
<input type="checkbox"/>	Ad Hoc E-mail from EA to Reviewers (HTML)	Ad Hoc From Editor		<input type="radio"/>	Edit	<input checked="" type="radio"/>	Edit	Remove   Hide

Hidden Letters							
Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	ActionManager Roles and Events	Letter Format				All Formats
			Text	Rich Text (HTML)			
Proposal Ad Hoc	Ad Hoc For Proposal		<input checked="" type="radio"/>	Edit	<input type="radio"/>	Edit	Remove   Restore
AMS HTML2	Batch E-mail		<input type="radio"/>	Edit	<input checked="" type="radio"/>	Edit	Remove   Restore

Add New Letter

Save Changes

Edit Image Files for Letters

Replace Selected Letters with Shared Letters

[Back to PolicyManager](#)

# 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.

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'.

# ActionManager Column

Replace with Shared Letter	Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	ActionManager Roles and Events	Letter Format		
				Text	Rich Text (HTML)	All Formats
<input type="checkbox"/>	Welcome Letter - Go Live	Batch E-mail		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Welcome	General	Author - New User Registers	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Transfer Letter 2	Decision		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Transfer Letter	Transfer Letter	Editorial Coordinator - Submission Transferred to Publication	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	
<input type="checkbox"/>	Terminate Assignment S	Terminate Assignments		<input type="radio"/> Edit	<input type="radio"/> 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):

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
DEMOSGG122	SGG Demo 12.2	Select All/ Clear All <input type="checkbox"/>
DEMOTB122	TB Demo 12.2	<input type="checkbox"/>

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		All Formats
				Text	Rich Text (HTML)	
<input type="checkbox"/>	Proposal Ad Hoc	Ad Hoc For Proposal		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Author Requests Deadline Extension on Revision	Ad Hoc From Author		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Author Requests Deadline Extension on Submission	Ad Hoc From Author		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Ad-hoc with password merge field	Ad Hoc From Editor		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide



# Shared Letter Templates

Hidden Letters					
Letter Purpose ▲ ▼	Letter Family Group by: ▲ ▼	ActionManager Roles and Events	Letter Format		
			Text	Rich Text (HTML)	All Formats
<i>Terminate Assignment</i> 	<i>Terminate Assignments</i>		<input checked="" type="radio"/> Edit	<input type="radio"/> <u>Edit</u>	Remove   Restore
<i>Proposal Ad Hoc</i>	<i>Ad Hoc For Proposal</i>		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Restore
<i>AMS HTML2</i>	<i>Batch E-mail</i>		<input type="radio"/> Edit	<input checked="" type="radio"/> 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
<input type="checkbox"/>	Welcome Letter - Go Live	Batch E-mail		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Welcome	General	<a href="#">Author - New User Registers</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Transfer Letter 2	Decision		<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Transfer Letter	Transfer Letter	<a href="#">Editorial Coordinator - Submission Transferred to Publication</a>	<input checked="" type="radio"/> Edit	<input type="radio"/> Edit	
	<i>Terminate Assignment</i> 	<i>Terminate Assignments</i>		<input type="radio"/> Edit	<input type="radio"/> <u>Edit</u>	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

[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:

Editor Roles That Can Send This Letter:  [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](mailto: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

Editors		<a href="#">Top</a>
<b>Name:</b>	 Steven Gain  [Proxy]	
<b>Role:</b>	Editor in Chief	
<b>Date Assigned:</b>	05/17/2016	
<b>Date Completed:</b>		
<b>Elapsed Days:</b>	20	
<b>Recommendation:</b>		

Reviewers		<a href="#">Top</a>
<b>Name:</b>	 Kevin Boyle (Reviewer)  [Proxy]	
<b>Review Status:</b>	Reviewer Declined	
<b>Date Review Due:</b>	05/31/2016	
<b>Date Declined:</b>	05/17/2016	

Alternate Reviewers		<a href="#">Top</a>
<b>Alternate Reviewers:</b>	There are no Alternate Reviewers currently selected for this manuscript.	

Reviewers Proposed by Editors		<a href="#">Top</a>
No Reviewers have been proposed by any Editor for this submission.		



# Rich Text (HTML) Letters

- HTML can be used for:
  - Inserting formatting (bold text, colored text, etc.)
  - Inserting images
- Deep Links display as text links in HTML
  - %PENDING\_ASSIGNMENTS\_DEEP\_LINK%
  - <http://demosgg122/edmgr.com/l/asp?i=3328&1=LKOLO>  
vs [Pending Assignments](#)

# Rich Text (HTML) Letters

Add New Letter

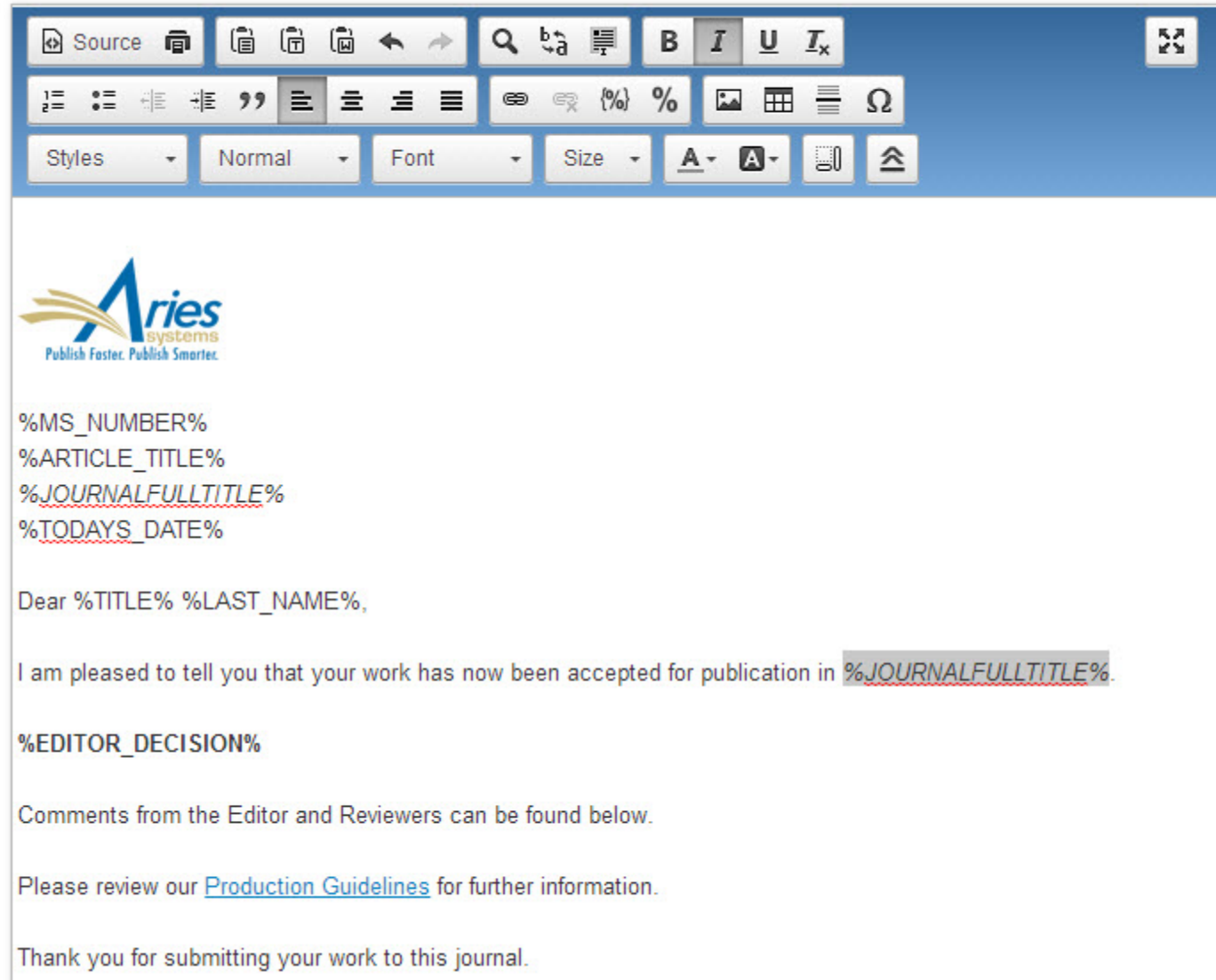
Save Changes

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		All Formats
				Text	Rich Text (HTML)	
<input type="checkbox"/>	Ad Hoc E-mail from EA to Reviewers (HTML)	Ad Hoc From Editor		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Ad Hoc From Author	Ad Hoc From Author		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Ad-Hoc From Editor - Allow Rich Text	Ad Hoc From Editor		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	AE Notification of Invited Author	General	<a href="#">Associate Editor</a> - Solicit Commentary on Submission	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	AMS HTML	Batch E-mail		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide

# Rich Text (HTML) Letters



The image shows a rich text editor interface with a blue header bar containing various icons for source, undo, redo, search, and text formatting (bold, italic, underline, strikethrough). Below the header are icons for bulleted and numbered lists, indent, outdent, quote, link, unlink, link icon, table, table icon, and a symbol icon. A styles dropdown is set to 'Normal', and font and size dropdowns are also visible. The main content area contains the following text:

  
Publish Faster. Publish Smarter.

%MS\_NUMBER%  
%ARTICLE\_TITLE%  
%JOURNALFULLTITLE%  
%TODAYS\_DATE%

Dear %TITLE% %LAST\_NAME%,

I am pleased to tell you that your work has now been accepted for publication in %JOURNALFULLTITLE%.

%EDITOR\_DECISION%

Comments from the Editor and Reviewers can be found below.

Please review our [Production Guidelines](#) for further information.

Thank you for submitting your work to this journal.

# Rich Text (HTML) Letters

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		All Formats
				Text	Rich Text (HTML)	
<input type="checkbox"/>	Ad Hoc E-mail from EA to Reviewers (HTML)	Ad Hoc From Editor		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Ad Hoc From Author	Ad Hoc From Author		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	Ad-Hoc From Editor - Allow Rich Text	Ad Hoc From Editor		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	AE Notification of Invited Author	General	<a href="#">Associate Editor</a> - Solicit Commentary on Submission	<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide
<input type="checkbox"/>	AMS HTML	Batch E-mail		<input type="radio"/> Edit	<input checked="" type="radio"/> Edit	Remove   Hide

# 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:

No file chosen

# Rich Text (HTML) in Text Letters

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](#)

## Customize Letter - Ad-Hoc From Editor - Allow Rich Text

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: "Steven Gain" <sgain@ariessys.com>

To: Corresponding Author;;

Letter Subject: Allow Rich Text Formatting in Text Letter

Letter Body:

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


# Rich Text (HTML) in Text Letters

From: "Steven Gain" <sgain@ariessys.com>

To: Corresponding Author;;

Letter Subject: Allow Rich Text Formatting in Text Letter

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



The toolbar contains the following elements from left to right: a grid icon, a list icon, a link icon, a search icon, a list icon, a bold (B) icon, an italic (I) icon, an underline (U) icon, a strikethrough (I<sub>x</sub>) icon, a bulleted list icon, a numbered list icon, a decrease indent icon, an increase indent icon, a quote icon, a link icon, a unlink icon, a percentage icon, and a refresh icon. Below the toolbar are four dropdown menus: Styles, Format, Font, and Size. To the right of these are two color selection boxes (A) and two icons: a document with a checkmark and an up arrow.

Add HTML:

# 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


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:  <input type="button" value="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	712.9 KB	06/06/2016
<input type="checkbox"/>	Original	Reviewer Version	711.6 KB	06/06/2016

### Submission Files

[Top](#)

Select	File Name	Description	Item	Size	Last Modified
<input type="checkbox"/>	manuscript.docx	Manuscript	Manuscript	12.7 KB	08/28/2013
<input type="checkbox"/>	Fig_1.jpg	Figure	Figure	78.5 KB	06/06/2016

# 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

Rich text editor toolbar with icons for undo, redo, search, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, quote, link, unlink, insert link, and refresh.





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 <b>Editor</b> -uploaded files as available by default to:	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Designate <b>Reviewer</b> -uploaded files as available by default to:	<input checked="" type="checkbox"/>	<input type="checkbox"/>

---

# 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
<b>Revision 1</b>						
<a href="#">Download</a> <a href="#">Download Sanitized Copy</a>	Steven Gain (Editor)	Attachment for Author	ReviewerPDF.pdf	566 KB	06/06/2016	<input checked="" type="checkbox"/>

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%	<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

# 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

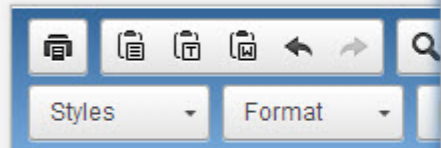
## Customize Letter - General Email to Author

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  
To: Corri  
Letter Subject: Email  
Attachments: Add  
Letter Body:



%CUSTOM\_EMUG%

### Insert Custom Merge Field

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



Expand All | Collapse All

 %CUSTOM\_EMUG%

 %CUSTOM\_EMUG2016%



Open in New Window

# Custom Merge Fields

## Preview Letter - General Email to Author

Custom Merge Field for EMUG 2016

# System Merge Fields

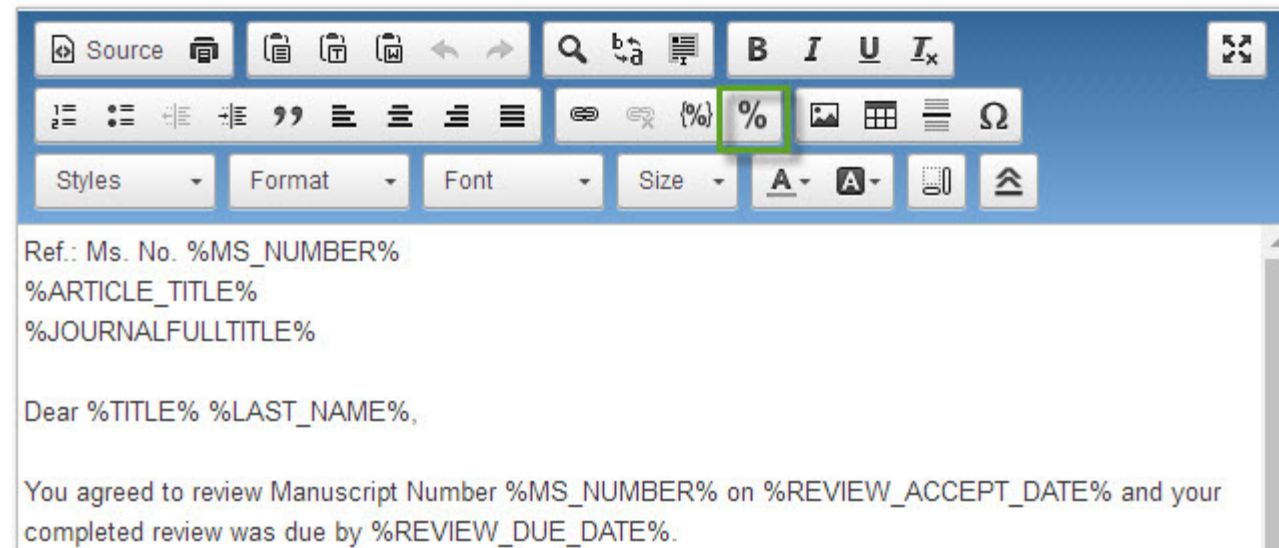
Letter Body: Insert Custom Merge Field | **Insert System Merge Field**

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%.



The screenshot shows a rich text editor toolbar with various icons. The icon representing a merge field (a percentage sign %) is highlighted with a green box. Below the toolbar, the text content is displayed, showing the same merge fields as in the first image.

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

**Insert System Merge Fields** ✕

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

✕ [Expand All](#) | [Collapse All](#)

- ⊕ %ACCEPT\_REVIEW\_INVITATION%
- ⊕ %ACCEPT\_REVIEW\_INVITATION\_AND\_VIEW\_REVIEWER\_PDF%
- ⊕ %ALL\_RESPONSES\_AND\_INDIVIDUAL\_COMMENTS\_TO\_AUTHOR%
- ⊕ %ATTACH\_FOR\_REVIEWER\_DEEP\_LINK%
- ⊕ %ATTACH\_FOR\_REVIEWER\_DEEP\_LINK\_INSTRUCTIONS%
- ⊕ %DECLINE\_REVIEW\_INVITATION%
- ⊕ %EDITOR\_REQUIRED\_REVIEWS\_COMPLETE\_DAYS%
- ⊕ %EDITOR\_REQUIRED\_REVIEWS\_COMPLETE\_FOLDER\_DEEP\_LINK%
- ⊕ %EDITOR\_REQUIRED\_REVIEWS\_COMPLETE\_SUBMISSIONS%
- ⊕ %EDITOR\_REQUIRED\_REVIEWS\_COMPLETE\_TOTAL%
- ⊕ %INDIVIDUAL\_REVIEWER\_COMMENTS\_TO\_AUTHOR%

# 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

## ☐ 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](#)

### %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

# 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  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  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  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  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  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

[Update Order](#) [Cancel](#) [Add New Term](#)

Order	Editor Decision Term	Author Notification Letter	Reviewer Notification Letter	New Document Status	Alternative Text for Authors	Decision Family	
<input type="text" value="1"/>	Accept	Editor Decision - Accept	Reviewer Notification of Accept Decision	Accept		Accept	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="2"/>	Revise	Editor Decision - Revise	Reviewer Notification of Revise Decision	Revise		Revise	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="3"/>	Reject	Editor Decision - Reject & Transfer	Reviewer Notification of Reject Decision	Reject		Reject	<a href="#">Remove</a> <a href="#">Edit</a>
<input type="text" value="4"/>	Transfer	Editor Decision - Reject & Transfer	None	Transfer Pending		Reject and Transfer	<a href="#">Remove</a> <a href="#">Edit</a>

# Reviewer Notification Letters

Editor Decision Term:

Author Notification Letter Options:

Accept

Default Optional Letter Purpose

- |                                  |                                     |   |
|----------------------------------|-------------------------------------|---|
| <input type="radio"/>            | <input type="checkbox"/>            | None Selected                               |
| <input checked="" type="radio"/> | <input checked="" type="checkbox"/> | Editor Decision - Accept                    |
| <input type="radio"/>            | <input type="checkbox"/>            | Editor Decision - Reject & Transfer         |
| <input type="radio"/>            | <input type="checkbox"/>            | Editor Decision - Revise                    |
| <input type="radio"/>            | <input type="checkbox"/>            | Editor Decision - Accept (French)           |
| <input type="radio"/>            | <input type="checkbox"/>            | Transfer Letter 2                           |
| <input type="radio"/>            | <input type="checkbox"/>            | Editor Decision - New Reviewer Merge Fields |
| <input type="radio"/>            | <input checked="" type="checkbox"/> | CAP Test - HTML                             |

Reviewer Notification Letter:

Reviewer Notification of Accept Decision ▼

Document Status:

Accept ▼

Decision Family:

Accept ▼

# 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.

<input type="button" value="Cancel"/> <input type="button" value="Submit Decision without Notifying Author"/>	
<input type="button" value="Preview Letter"/> <input type="button" value="Save"/> <input type="button" value="Save and Close"/> <input type="button" value="Send Now"/>	
Editor Decision:	Accept
Modify Decision:	Accept ▼
From:	"12.2 Demo" <sgain@ariessys.com>
To:	<a href="#">John Carnevale</a>
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	
<input type="checkbox"/>	<input type="checkbox"/> <a href="#">Lisa Gosselin (Associate Editor)</a>

# 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	<a href="#">Reviewer Notification of Accept Decision</a>	<input type="checkbox"/>
Scott Farmer (Reviewer)	DEMOSGG-000008	Original Submission	Reviewer Notification Letter - EMUG 2016	<a href="#">Reviewer Notification of Accept Decision</a>	<input type="checkbox"/>

[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

- Users will sometimes provide information to the publication outside of Editorial Manager
- EM has two ways to add external information to the Correspondence History
  - Manual
  - Automated

# Managing External Correspondence

- Add/Edit External Correspondence
- If Attachments feature is enabled
  - Add Attachments to External Correspondence
  - RoleManager Permission – General Searching and Viewing

- Add/Edit External Correspondence
  - Add Attachments to External Correspondence

# Managing External Correspondence

## CORRESPONDENCE HISTORY

Add Editorial Correspondence

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

# Managing External Correspondence

## Add External Editorial Correspondence

Items marked with an asterisk are required. The 'Correspondence Date' and 'Description' fields will be listed on the History page. Paste or type any desired text into the 'Letter Body' area, but note that any formatting will be lost. Click 'Open in New Window' if you need extra space to edit the correspondence.

Note: Please check the text for any sensitive information that should be removed or obscured (such as passwords or names of reviewers), as the system cannot automatically anonymize correspondence you add manually. Correspondence where you enable the 'Display in Author's Correspondence History' checkbox can be viewed by the author if your publication allows this.

Cancel

Submit

**Display In Author's Correspondence History**

\* Correspondence Date: 06/06/2016 (mm/dd/yyyy) Time: Hour: 12 Minute: 45 AM/PM: PM U.S. Eastern Time

\* Description: EMUG 2016

From: Jeff Tassi

To: Editorial Office

Letter Subject: EMUG 2016 Query

Attachments: Add/Change Attachments

Letter Contents: Open in New Window

Rich text editor toolbar with icons for Source, Undo, Redo, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Quote, Unquote, Link, Unlink, Insert Link, Insert Image, and other editing tools.

Cut and paste email into the letter body

# Managing External Correspondence

## CORRESPONDENCE HISTORY

Add Editorial Correspondence

Correspondence Date	Letter	Recipient	Status	Revision	Operator
06/06/2016	EMUG 2016 (External) <a href="#">Remove</a> <a href="#">Edit</a>				Steven Gain
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

# Managing External Correspondence

## Automatic Import via Email Drop-Box

- Allows e-mail responses to letters originating from EM to be imported into the Correspondence History of the related submission
- Emails to be imported are forwarded to a unique drop box e-mail address created by Editorial Manager
- 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

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

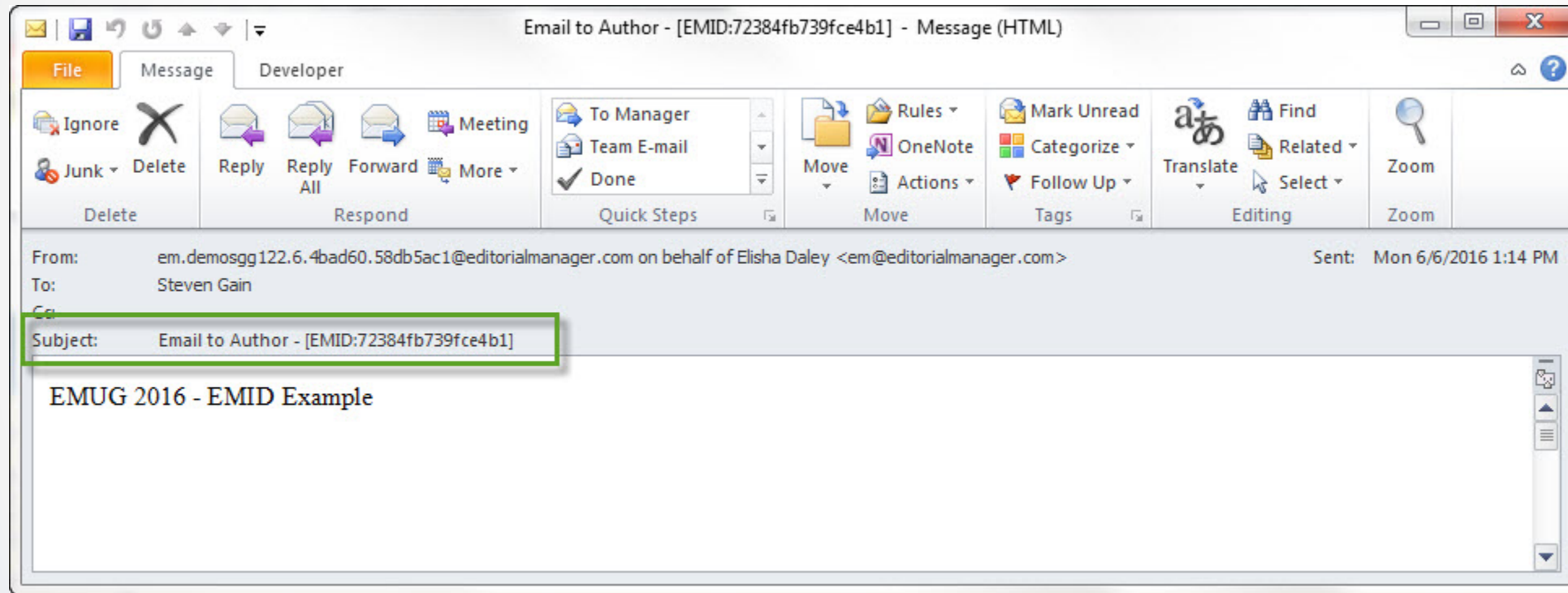
Submit

[Return to PolicyManager](#)

# Managing External Correspondence

Action	Manuscript Number	Article Type	Section/Category	Article Title	Author Name	Initial Date Submitted
<ul style="list-style-type: none"><li>View Submission</li><li>Duplicate Submission Check (40%)</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>Notify Editor</li><li>Set Final Disposition</li><li>Initiate Production</li><li>Google Title Search</li><li>Send E-mail</li><li>Linked Submissions</li></ul>	DEMOSGG-16-85	Demo		Review Decline	Jeff Tassi MD	05/17/2016

# Managing External Correspondence



# Managing External Correspondence

To



Elisha Daley x

Re: Email to Author - [EMID:61b39a5a67df094]

Reply from Author

**From:** em.demosgg122.6.4bad60.58db5ac1@editorialmanager.com <em.demosgg122.6.4bad60.58db5ac1@editorialmanager.com>  
<em@editorialmanager.com>


**Sent:** Monday, June 6, 2016 1:14 PM

**To:** Jeff Tassi

**Subject:** Email to Author - [EMID:61b39a5a67df094]

EMUG 2016 - EMID Example

# Managing External Correspondence

To  em.demosgg122-1a0a225175aa4b24@editorialmanager.com ✕

---

Fw: Email to Author - [EMID:61b39a5a67fdf094]

---

Forward to Drop-Box

---

**From:** Steven Gain <steven\_gain@hotmail.com>  
**Sent:** Monday, June 6, 2016 1:21 PM  
**To:** Steven Gain  
**Subject:** Re: Email to Author - [EMID:61b39a5a67fdf094]

Reply from Author

# Managing External Correspondence

**CORRESPONDENCE HISTORY**

[Add Editorial Correspondence](#)

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

# 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

- View Editorial Status History
- View Editorial Correspondence History
  - Edit Letter when Resending
- Add/Edit External Correspondence
  - Add Attachments to External Correspondence
- View All Submissions
- View Completed Reviews Grid in Main Menu
- View Additional Manuscript Details
  - Edit Additional Manuscript Details
- View Notes on Manuscript Details
- Edit Notes on Manuscript Details
- Turn On Manuscript Notes Flag
- Turn Off Manuscript Notes Flag

# Editing and Resending Letters

**CORRESPONDENCE HISTORY**

Add Editorial Correspondence

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

## View Letter

[Close](#) [Edit and Resend](#) [Resend](#)

**Date:** 06/06/2016  
**To:** "Jeff Tassi" steven\_gain@hotmail.com  
**From:** "Elisha Daley" steven\_gain@hotmail.com  
**Subject:** Email to Author

EMUG 2016 - EMID Example

[Close](#) [Edit and Resend](#) [Resend](#)

# Editing and Resending Letters

## Edit and Resend Letter

Please note that merge fields cannot be populated during the resend process. Deep links will be regenerated and all previously merged fields will retain the merged text (as shown below), but newly added fields will not be merged into the letter.

Cancel

Send

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

To:  "Trevor Barker" sgain@ariessys.com (Original Recipient) [Update User's Address](#)

Additional recipients can be added (separated by semicolons) but please note that in the letter sent to manually added recipients, deep links and username/password information will be replaced by asterisks.

Letter Subject:

If copies of the original letter were sent to additional recipients, they are listed below. You may add or remove recipients as desired. Multiple e-mail addresses can be included, separated by semicolons (;).

cc:

bcc:

 Attachment(s):

Letter Body: [Insert Special Character](#)

# Editing and Resending Letters

CORRESPONDENCE HISTORY					
Add Editorial Correspondence					
Correspondence Date	Letter	Recipient	Status	Revision	Operator
06/06/2016	<a href="#">General Email to Author</a>	Jeff Tassi, MD	Under Review	0	Steven Gain
06/06/2016	Imported E-mail (External) <a href="#">Remove</a> <a href="#">Edit</a>				
06/06/2016	<a href="#">General Email to Author</a>	Jeff Tassi, MD	Under Review	0	Elisha Daley [Proxied by Steven Gain]