

ScholarOne Manuscripts™

# Email Template User Guide

1-May-2018

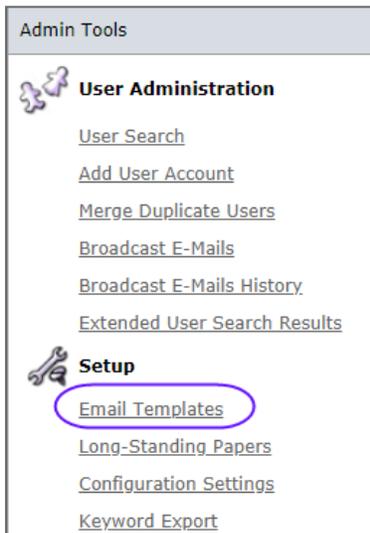


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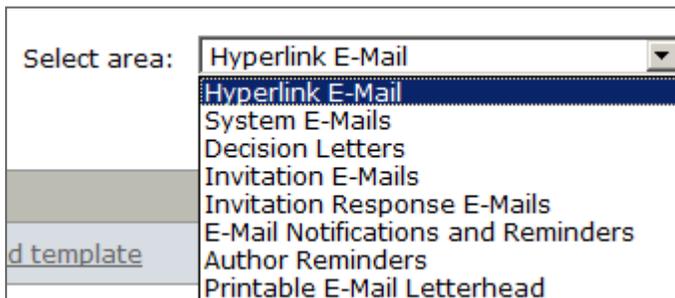
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## INTRODUCTION

All sites are created with a basic set of e-mail templates. When a site is assigned to a journal, the administrator of the site usually modifies the e-mail templates to the needs of the journal. This guide is intended to give you an overview of the basic navigation of the e-mail templates as well as suggestions for editing your templates.



To access the e-mail templates of your site, you must have Administration rights. The e-mail templates are located in the **Admin Tools** section under **Setup**.



## TYPES OF E-MAIL TEMPLATES

When looking at the list of e-mail templates it can be very confusing as to where to start. We have devised an order of study to assist you with your templates. The order in which to go through e-mail templates is:

1. E-Mail Notifications and Reminders
  2. Invitation E-Mails
  3. Invitation Response E-Mails
  4. Decision Letters
  5. Author Reminders
  6. System E-Mails
  7. Hyperlink E-mail
  8. Printable E-Mail Letterhead
- Items 1-5 follow the basic peer review process of a site.
  - Items 6 and 7 are additional types of e-mail templates.
  - Item 8 is an additional feature that can be used in conjunction with your e-mail templates.

## E-MAIL NOTIFICATIONS AND REMINDERS

These templates are linked to tasks within the peer review process. They facilitate communications between Admin, Editors, and Reviewers; to notify someone if they have a task that is pending or overdue. Typically these notifications are automated but can be customized and adjusted as needed.

Each workflow in the site has its own set of e-mail templates.

- Submitted Workflow Tasks (SW)
- Resubmitted Workflow Tasks (RSW)
- Revised Workflow Tasks (RW)

- Appealed Workflow Tasks
- Accept Workflow Tasks
- Invited Workflow Tasks (IW)

**Note:** Some sites do not contain the Resubmitted or Appealed Workflow.

Each section of **E-mail Notifications and Reminders** templates contains the following layout:

**E-Mail** **Note to users:** This area requires user training. New and existing email templates are formatted, modified and activated here.

**E-Mail Notifications and Reminders**

Workflow

Task

Template

Callouts: Edit Before Sending, Active, When Task Enters? or Reminder Days, Modify, Delete

Submitted Workflow Tasks	Edit Before Sending	Active	When Task Enters?	Reminder Days	Modify	Delete
Pick Reviewers - <a href="#">add template</a>						
SW - Awaiting Reviewer Selection one week late	<input type="checkbox"/>	<input type="checkbox"/>	Pending ▼ or <input type="text"/>			
SW - Reviewer Selection now due	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Overdue ▼ or <input type="text"/>			
SW Pick Revs 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending ▼ or <input type="text"/>			
Invite Reviewers - <a href="#">add template</a>						
Assign Reviewers - <a href="#">add template</a>						
SW - Awaiting Reviewer Assignment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pending ▼ or <input type="text"/>			
SW - Reviewer Assignments now due	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Overdue ▼ or <input type="text"/>			

SCREEN COMPONENT	DESCRIPTION
Workflow	The name of the workflow.
Task	The name of the task within the workflow.
Template	The e-mail templates associated with the task.
Edit Before Sending	If checked, the e-mail may be edited before being sent. Allows customization if needed.
Active	If checked, the template is used. Unchecked templates are not used.
When Task Enters?	This is a trigger to when an e-mail is sent. Select from a list of statuses. When the manuscript enters the selected status, it is sent. Use either this field or Reminder Days. (See below for details.)
Reminder Days	This is a trigger to when an e-mail is sent. Enter the number of days before or after the manuscript enters that status for the e-mail to be sent. Use either this field or When Task Enters? (See below for details.)
Modify	Click the Modify button to edit the template.
Delete	Click the Delete button to delete the template. It is not recommended to delete templates. Instead, simply uncheck the Active checkbox if you do not want to use a specific e-mail template.  If you Delete an e-mail template and decide you need it later, you will have to create a brand new template.

## When Task Enters?

The **When Task Enters?** section contains a dropdown of the following:

- **Pending:** Has entered the task, but is not completed (e.g., pending Admin Checklist)
- **Processing:** Has been started, but is not completed (e.g., 2 reviews agreed, none submitted)

- **Overdue:** A task is in an overdue status when the number of days given to the task has expired
- **Completed:** The Task has been completed (e.g., reviewer has submitted review)
- **Abandoned:** Still open when decision is made (e.g., reviewer has agreed to review but has not completed the review when the EIC makes decision)
- **Rescinded:** Moving a manuscript back one step (e.g., rescind review or decision)
- **Closing:** When the task is still open and a decision has been made before the task is completed. (e.g., when the option “allow reviewer to submit a scoresheet after a decision is made”, the status Reviewer Score task is “Closing”)

Submitted Workflow Tasks	Edit Before Sending	Active	When Task Enters?	Reminder Days	Modify	Delete
<span>?</span> AE Pick Reviewers - <a href="#">add template</a>						
SW - Awaiting Reviewer Selection	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pending	or <input type="text"/>		
SW - Reviewer Selection now due	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pending	or <input type="text"/>		
<span>?</span> AE Invites Reviewers - <a href="#">add template</a>						
SW - Invite Reviewers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Overdue	or <input type="text"/>		
<span>?</span> AE Assigns Reviewers - <a href="#">add template</a>						

## Reminder Days

An example of E-mail Notifications and Reminders is the reminders for Reviewers, listed under the Task of **Reviewers Score**.

In this section you will often see 2 or more reminders set at a numeric value. Sites are configured with a number of days that a reviewer has to complete their review.

- 7 means the e-mail will automatically be sent 7 days **after** the task is due
- -7 means the e-mail will automatically be sent 7 days **before** the task is due
- 0 means the e-mail will automatically go out on the day it becomes overdue

🔍 Reviewers Score - <a href="#">add template</a>					
SW - Reviewer Scores are due in 1 week	<input type="checkbox"/>	<input checked="" type="checkbox"/>	--- ▼ or -7		
SW - Reviewer Scores are 1 week late	<input type="checkbox"/>	<input checked="" type="checkbox"/>	--- ▼ or 7		
Recinded Notice to Reviewer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Rescinded ▼ or	<input type="text"/>	
SW - Reviewer Scores no longer needed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Abandoned ▼ or	<input type="text"/>	
SW - Reviewer Scores now due	<input type="checkbox"/>	<input checked="" type="checkbox"/>	--- ▼ or 0		
SW - Thank you for submitting your review	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Completed ▼ or	<input type="text"/>	

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**Note:** The **When Task Enters?** section must be set at “---” if you are using a number in the Reminder Days column.

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**Tip:** This is a great section to add additional e-mail templates if Reviewers need more reminding to complete reviews in a timely fashion.

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## INVITATION E-MAILS

These templates are typically the invitation to reviewers.

**Required for Event?** must be checked in order for the invitation task to take place. This means that you must send an invitation e-mail in order for the system to move the process forward to the invited stage. If you do not select **Required for Event?**, no e-mail would be sent to the reviewer to alert them to the invitation, however the system would show them reviewer as having been “Invited”.

Multiple templates can be created if special types of invitations are needed for a site. These extra invitations could be based upon Manuscript Type, or when a special person is being asked to review and a more formal letter is needed.

Submitted Workflow Tasks	Edit Before Sending	Active	Required for Event?	Modify	Delete
req ⓘ (Task: AE Invites Reviewers) AE Invites Reviewers - <a href="#">add template</a>					
Editor Invitation to Reviewer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Special Invite	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

The invitation e-mails will be preloaded with e-mail tags that will pull in document information as well as a tag that will create automatic response links for the reviewer to quickly respond to the invitation.

Types of tags you will find preloaded are:

##DOCUMENT\_TITLE##

##DOCUMENT\_AUTHORS## - (unless the site is double blinded)

##DOCUMENT\_ABSTRACT##

##DOCUMENT\_ID##

##INVITE\_RESPONSES## - This tag will create links for Agreed, Decline, or Unavailable (see example below of how the links will look in an e-mail.)

**Edit E-Mail** (MCU4-2018-04-0001)      Select Alternate Template: Editor Invitation to Reviewer ▼

**From:** qa-mc@manuscriptcentral.com

**To:** griff@test.demo

**CC:**

**BCC:**

**Subject:** Invitation to Review for the ScholarOne University Training Workflow 4

**Body:**

Workflow 1 Admin Center Contact  
ScholarOne University Training Workflow 4 Editorial Office  
qa-mc@manuscriptcentral.com

\*\*\* PLEASE NOTE: This is a two-step process. After clicking on the link, you will be directed to a webpage to confirm. \*\*\*

Agreed: [https://mc-beta.manuscriptcentral.com/s1u-wf4?URL\\_MASK=c78e8ae3715b4d75aa5f4137e9ea2ef2](https://mc-beta.manuscriptcentral.com/s1u-wf4?URL_MASK=c78e8ae3715b4d75aa5f4137e9ea2ef2)

Declined: [https://mc-beta.manuscriptcentral.com/s1u-wf4?URL\\_MASK=6a676e19265c4346b2243787c93dce10](https://mc-beta.manuscriptcentral.com/s1u-wf4?URL_MASK=6a676e19265c4346b2243787c93dce10)

Unavailable: [https://mc-beta.manuscriptcentral.com/s1u-wf4?URL\\_MASK=8bbfee7ed11848a396ba64708c6c5dce](https://mc-beta.manuscriptcentral.com/s1u-wf4?URL_MASK=8bbfee7ed11848a396ba64708c6c5dce)

MANUSCRIPT DETAILS

TITLE: Training Adults

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**Note:** The links are unique to each reviewer who receives an invitation. Do not copy and paste links from one reviewer invitation to another.

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## INVITATION RESPONSE E-MAILS

These templates are triggered when a response is received from a reviewer. As with Invitation e-mails, **Required for Event?** must be checked in order for the invitation response task to take place.

**Tip:** The Admin or Editor e-mail address could be set up in the CC or BCC field if a role needs to be copied on all responses. This will increase the amount of e-mail to a person's inbox if you set up your responses in this fashion.

Submitted Workflow Tasks	Edit Before Sending	Active	Required for Event?	Modify	Delete
🔔 (Task: AE Invites Reviewers) AE Invites Reviewers - Auto-Denied - <a href="#">add template</a>					
🔔 (Task: AE Invites Reviewers) AE Invites Reviewers - Agreed - <a href="#">add template</a>					
SW - Reviewer Agreed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
🔔 (Task: AE Invites Reviewers) AE Invites Reviewers - Declined - <a href="#">add template</a>					
SW - Reviewer Declined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
🔔 (Task: AE Invites Reviewers) AE Invites Reviewers - Late Response - <a href="#">add template</a>					
SW - Reviewer Late Response	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
🔔 (Task: AE Invites Reviewers) AE Invites Reviewers - No Response - <a href="#">add template</a>					
SW - Reviewer No Response	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
🔔 (Task: AE Invites Reviewers) AE Invites Reviewers - Unavailable - <a href="#">add template</a>					
SW - Reviewer Unavailable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

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**Note:** Avoid setting up multiple e-mails templates for a single task in the Submitted Workflow Tasks section. If the site is using automatic response links in the **Invitation E-mails**, the system cannot match up which custom **Invitation Response E-mail** to send.

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The **Agreed** e-mail has been formatted with a tag called **##REVIEW\_LINK##**. This tag will give the reviewer the ability to access the paper they agreed to review without having to know their User ID or password.

**Edit E-Mail** (MCU4-2018-04-0001) Select Alternate Template: SW - Reviewer Agreed

**From:** qa-mc@manuscriptcentral.com

**To:** griff@test.demo

**CC:**

**BCC:**

**Subject:** Manuscript ID MCU4-2018-04-0001 now in your Reviewer Center - Sch

**Body:** Thank you for agreeing to review Manuscript ID MCU4-2018-04-0001 entitled "Training Adults" for the ScholarOne University Training Workflow 4. Please try your best to complete your review within the next 2 weeks.

In your review, please answer all questions. On the review page, there is a space for "Comments to Editor" and a space for "Comments to the Author." Please be sure to put your comments to the author in the appropriate space.

To access the manuscript, login to the ScholarOne University Training Workflow 4 - Manuscript Central site at <https://mc-beta.manuscriptcentral.com/s1u-wf4>. Your case-sensitive USER ID is CarlaG and your PASSWORD is @@PERSON\_PASSWORD\_DIRECT\_LINK57412787@@.

[https://mc-beta.manuscriptcentral.com/s1u-wf4?URL\\_MASK=b769f2762fe8469aa5e90ba423bbaaa6](https://mc-beta.manuscriptcentral.com/s1u-wf4?URL_MASK=b769f2762fe8469aa5e90ba423bbaaa6)

Once you are logged in, the Main Menu will be displayed. Please click on the Reviewer Center, where you will find the manuscript listed under "Awaiting Reviewer Scores." You can click on the manuscript title from this point or you can click on the "View Details" button to begin reviewing the manuscript.

## DECISION LETTERS

These templates are the final decisions that are sent to Authors. This is also a section where multiple templates can be of great assistance. Multiple decision letters can be created under each decision type, as well as a thank you letter to reviewers.

When creating multiple decision letters, **Edit Before Sending**, **Active** and **Required for Event?** must be checked

When creating an "extra" e-mail like the **Thank You to Reviewers**, do not select **Required for Event?** For this template, as this would not allow it to go out from the system as an "extra" e-mail.

Submitted Workflow Tasks	Edit Before Sending	Active	Required for Event?	Modify	Delete
req ⓘ (Task: EIC Decision) Accept - <a href="#">add template</a>					
SW - EIC Accept	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
req ⓘ (Task: EIC Decision) Minor Revision - <a href="#">add template</a>					
Reviewer Thank you Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
SW - EIC Minor Revision	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Xtra changes needed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

The **Thank You to Reviewers** e-mail will contain a tag in the BCC field called: `##TASK_ALL_REV_EMAIL_CLOSED##`. The tag blind carbon copies all reviewers who completed a review for the submission.

**Edit E-Mail**

**Name:**

---

**From:**

**To:**

**Cc:**

**Bcc:**

**Subject:**   View E-Mail Tags

**Body:**

Dear Reviewer,

Thank you for taking the time to review for our journal. A decision has been of Minor Revision

Please see the comments of all reviewers.

The reviewer's comment's are as follows:

##COMMENTS\_TO\_AUTHOR##

## AUTHOR REMINDERS

The **Author Reminders** are typically used to remind the Author when their revision/resubmission is due. The **Reminder Days** column determines when the reminder is sent out. Each revision/resubmission decision has a set number of days as to how long the Author has to submit. Another option for the Author reminders is to CC or BCC the Admin and/or the Editor on the reminder.

Submitted Workflow Tasks	Active	Reminder Days	Modify	Delete
 (Task: EIC Decision) Minor Revision - <a href="#">add template</a>				
SW – Minor Revision due in 2 weeks	<input checked="" type="checkbox"/>	-14		
 (Task: EIC Decision) Major Revision - <a href="#">add template</a>				
SW – Major Revision due in 2 weeks	<input checked="" type="checkbox"/>	-14		
 (Task: EIC Decision) Reject & Resubmit - <a href="#">add template</a>				
SW – Resubmission due in 2 weeks	<input checked="" type="checkbox"/>	-14		

**Tip:** Explain in the reminder to the Author that the link to create their revision/resubmission will be closed if they do not ask for an extension.

## SYSTEM E-MAILS

System E-mails are triggered by non-workflow events. These templates are divided into the following sections:

- E-Mails for Authors / Co-Authors
- E-Mails for Invited Author / MRW
- Account Related E-Mails
- Misc. Event-Driven E-Mails

## E-Mails for Author / Co-Authors

This section of templates will contain the e-mails used for notifying the Author of the receipt of the original submission, or if their paper has been Unsubmitted or Withdrawn.

E-Mails for Authors / Co-Authors	Edit Before Sending	Active	Modify	Delete
<b>req</b> Manuscript is Unsubmitted - <a href="#">add template</a>				
Your manuscript has been unsubmitted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>req</b> Manuscript is Withdrawn - <a href="#">add template</a>				
Your manuscript has been withdrawn	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>?</b> Appeal Decision Denied - <a href="#">add template</a>				
Deny appeal to author	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>?</b> Co-Author Account Created During Manuscript Submission - <a href="#">add template</a>				
Co-Author Account Created	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>req</b> First Look Manuscript Submission Confirmation - <a href="#">add template</a>				
Author Submit Manuscript	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>req</b> Invitation Manuscript Submission Confirmation - <a href="#">add template</a>				
Author Submit Manuscript	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>req</b> Original Manuscript Submission Confirmation - <a href="#">add template</a>				
Author Submit Manuscript	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>req</b> Resubmission Manuscript Submission Confirmation - <a href="#">add template</a>				
Author Submit Manuscript	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

**Tip:** Add text to the **Original Manuscript Submission Confirmation** letting the Author know how long it may take to receive a decision on their paper. This can help reduce the number of inquiries a journal office receives from Authors regarding the status of their paper.

## E-mails for Invited Author / MRW

If you are using the Invited Author feature of the system these templates are used for reminding an Author that they have been invited to submit but have not yet responded, as well as the ability to Unassign or Uninvite an Author.

E-Mails for Invited Authors / MRW	Edit Before Sending	Active	Modify	Delete
<span>?</span> Author Invitation Reminder 1 - <a href="#">add template</a>				
Author Invitation Reminder 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>?</span> Author Invitation Reminder 2 - <a href="#">add template</a>				
Author Invitation Reminder 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>?</span> Unassign Author - <a href="#">add template</a>				
Unassign Author	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>?</span> Uninvite Author - <a href="#">add template</a>				
Uninvite Author	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
				<input checked="" type="checkbox"/> Save

## Account Related E-Mails

A good practice for the **Account Related E-Mails** is to leave them at the standard and not edit the templates.

Account Related E-Mails	Edit Before Sending	Active	Modify	Delete
<span>?</span> Create Associate Editor Account On-The-Fly From Pick - <a href="#">add template</a>				
Create Associate Editor account on the fly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>?</span> Create Reviewer Account On-The-Fly - <a href="#">add template</a>				
Create Reviewer Account On-The-Fly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>?</span> Admin Add User - <a href="#">add template</a>				
Admin Add User	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>req</span> <span>?</span> Admin Send Account Info - <a href="#">add template</a>				
Admin Send Account Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>req</span> <span>?</span> User Account Creation Notification - <a href="#">add template</a>				
Your account has been created	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>req</span> <span>?</span> User Account Modification Notification - <a href="#">add template</a>				
Your account has been modified	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>req</span> <span>?</span> Forgot Password - <a href="#">add template</a>				
Forgot Password	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>req</span> <span>?</span> User holds duplicate accounts - <a href="#">add template</a>				
Duplicate Accounts : Unable to send information	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<span>?</span> Role Expired - <a href="#">add template</a>				
				<input checked="" type="checkbox"/> Save

## Misc Event-Driven E-Mails

This section contains e-mail(s) for the Broadcast E-mail feature in the Admin Dashboard. It also contains special e-mails used to remind Reviewers that they have been invited to a paper and not yet responded and e-mails for Unassign Editor and Assign a new Editor.

If you are exporting accepted papers to an FTP site, there is also e-mail for notification if the export fails.

For sites that use Plagiarism Checking, notifications for this feature are also located here.

Misc. Event-Driven E-Mails	Edit Before Sending	Active	Modify	Delete
<b>req</b> ⓘ Conversation Participant Notification - <a href="#">add template</a>				
Notify Conversation Participant	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>?</b> Author Approval of Transfer Manual Reminder - <a href="#">add template</a>				
Request to transfer your manuscript	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<b>req</b> ⓘ Manuscript exported via email - <a href="#">add template</a>				
Manuscript Exported Via E-Mail	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>req</b> ⓘ Export Manifest exported via email - <a href="#">add template</a>				
<b>?</b> Electronic Form: PDF Failed to Generate - <a href="#">add template</a>				
Electronic Form: PDF Failed to Generate	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>req</b> ⓘ Broadcast E-Mails - <a href="#">add template</a>				
Broadcast E-Mail	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
End of Year Thanks!	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>req</b> ⓘ Manuscript Export Failed - <a href="#">add template</a>				
Manuscript Failed to Export	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>?</b> Manuscript Export Succeeded - <a href="#">add template</a>				
Manuscript has been Exported	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>?</b> Manuscript Export Failed (File Storage) - <a href="#">add template</a>				
Manuscript Failed to Export	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>?</b> Manuscript Export Succeeded (File Storage) - <a href="#">add template</a>				
Manuscript has been Exported	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

## HYPERLINK E-MAILS

A **Hyperlink E-mail** is used anywhere a person’s name is underlined in the system. These templates contain basic information in the From, To and Subject line and do not need to be edited.

Hyperlink E-Mail				
E-Mail Templates	Default	Active	Modify	Delete
req ⓘ Hyperlink E-Mail (From Within Mss Details) - <a href="#">add template</a>				
Hyperlink E-Mail (From Within Mss Details)		<input checked="" type="checkbox"/>		
req ⓘ Hyperlink E-Mail (From Outside Mss Details) - <a href="#">add template</a>				
Hyperlink E-Mail (From Outside Mss Details)		<input checked="" type="checkbox"/>		
req ⓘ Author Hyperlink E-Mail (From Within Mss Details)				
Author Template		<input checked="" type="checkbox"/>		
req ⓘ Reviewer Hyperlink E-Mail (From Within Mss Details)				
Reviewer Template		<input checked="" type="checkbox"/>		
				<input checked="" type="checkbox"/> Save

You may create extra Hyperlink E-mails for shortcuts for communications that take place outside the normal workflow process. These templates are available from a drop-down list when e-mailing a person.

**Hyperlink E-Mail**

E-Mail Templates	Default	Active	Modify	Delete
<b>req</b> Hyperlink E-Mail (From Within Mss Details) - <a href="#">add template</a>				
Admin use only - Email to all authors	<input type="radio"/>	<input checked="" type="checkbox"/>		
Hyperlink E-Mail (From Within Mss Details)	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		
Improper Co-Author Email address	<input type="radio"/>	<input checked="" type="checkbox"/>		
Invitation Reminder	<input type="radio"/>	<input checked="" type="checkbox"/>		
RW - Invite New Reviewer	<input type="radio"/>	<input checked="" type="checkbox"/>		
<b>req</b> Hyperlink E-Mail (From Outside Mss Details) - <a href="#">add template</a>				
Hyperlink E-Mail (From Outside Mss Details)	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		
<b>req</b> Author Hyperlink E-Mail (From Within Mss Details)				
Author Template	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		
<b>req</b> Reviewer Hyperlink E-Mail (From Within Mss Details)				
Reviewer Template	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		
				<input checked="" type="checkbox"/> Save

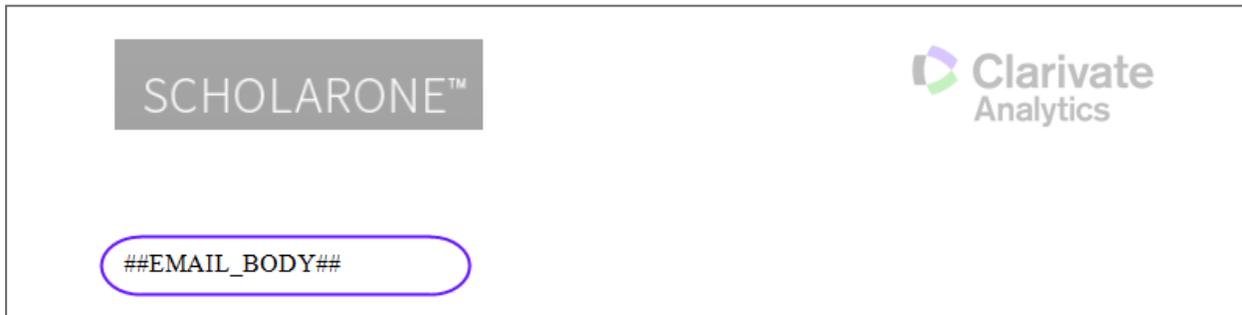
## PRINTABLE E-MAIL LETTERHEAD

E-mails are plain text only, meaning that there is no ability to add color or logos. Printable E-mail letterhead allows sites to have their letterhead in the system and can be used to recreate a sent e-mail on to the letterhead and then resend as a PDF file.

**Printable E-Mail Letterhead**  
 Note to Users: To learn more about how the Printable Letter Head works, [click here](#)

Printable Letterhead Template Files	Default	Active	Delete
<a href="#">SCHOLARONE UNIVERSITY.rtf</a>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	
			<input checked="" type="checkbox"/> Save

Create a .RTF file with the journal or society logo, address and e-mail tag called: **##EMAIL\_BODY##**



Upload the file and make it Default and Active.

Printable Letterhead Template Files	Default	Active	Delete
<a href="#">ScholarOneLetterhead.rtf</a>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			<input checked="" type="checkbox"/> Save

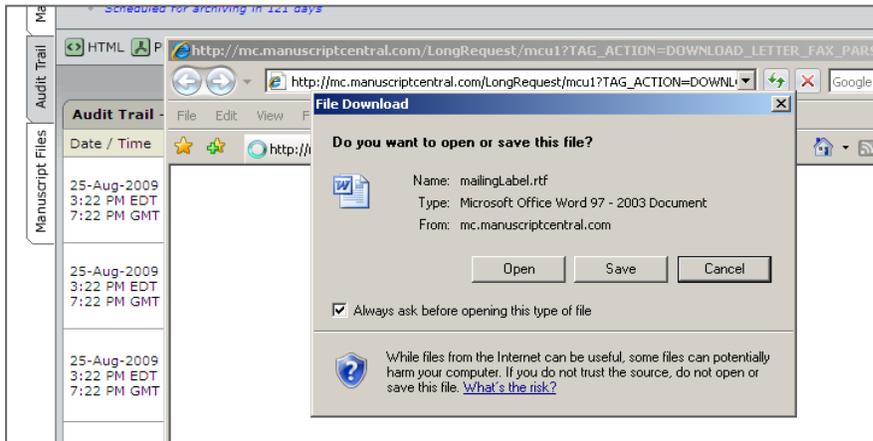
**Tip:** If needed, you can upload more than one letterhead.

## How Printable E-mail Letterhead Works

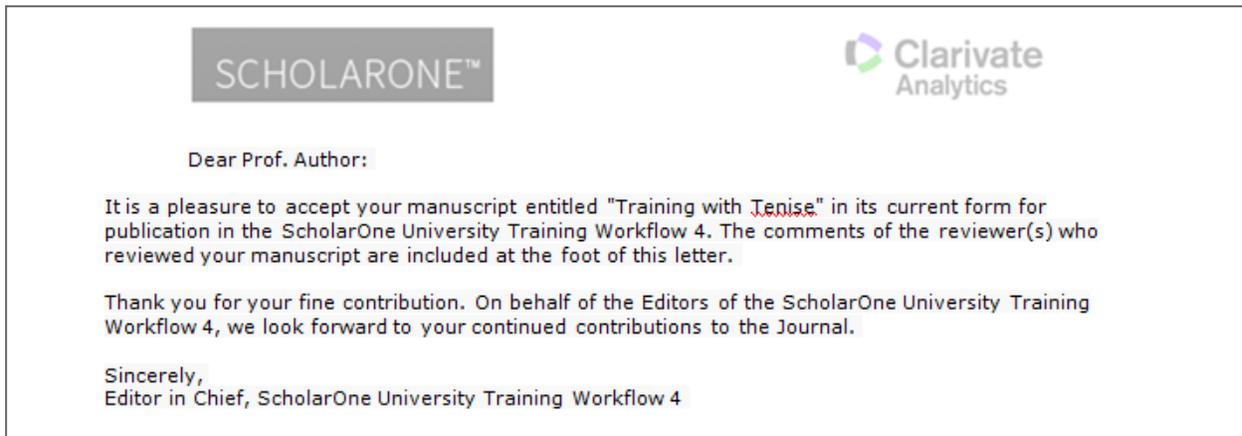
In the Audit Trail of each submission, you will see a new icon for each e-mail that has been sent from the system.

Audit Trail - view all / <a href="#">letters only</a>	
Date / Time	Event
09-Apr-2018 2:05 AM EDT	 To: Lil@test.demo From: ae@test.demo Subject: Reminder: Review Due Today - ScholarOne University
09-Apr-2018 6:05 AM GMT	Training Workflow 4

Select the printer icon to open the e-mail on screen and select Open.



The e-mail is now ready to be saved as a **PDF** file and resent as a file attachment.



## EDITING

When editing e-mail templates, look for the “req” symbol next to templates that should not be turned off or deleted.

E-Mails for Authors / Co-Authors	Edit Before Sending	Active	Modify	Delete
req  Manuscript is Unsubmitted - <a href="#">add template</a>				
Your manuscript has been unsubmitted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
req  Manuscript is Withdrawn - <a href="#">add template</a>				
Your manuscript has been withdrawn	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

When editing e-mail templates, also look for the orange question mark (?). When you click on the question mark, a text box will appear that tells you when the e-mail is triggered, where it is triggered from, and who can trigger the e-mail.

E-Mails for Authors / Co-Authors					
req		Manuscript is Unsubmitted - <a href="#">add template</a>			
		This e-mail is triggered when the Admin unsubmitted a manuscript from the Manuscript Details > Manuscript Files Tab or when the Admin sends a transferred manuscript back to the author. The manuscript is not unsubmitted unless this e-mail is sent. This e-mail is meant to notify the Author that their manuscript has been unsubmitted. This email is not required for sending a transferred manuscript back to the author.			
req					

To edit an e-mail template, click the **Modify** button for the specific template.

**From:** ##PROLE\_EDITOR-IN-CHIEF\_EMAIL##

**To:** ##PROLE\_AUTHOR\_EMAIL##

**Cc:**

**Bcc:**

**Subject:** ##JOURNAL\_NAME## - Decision on Manuscript [View E-Mail Tags](#)

**Body:** ##CURRENT\_DATE##

Dear ##PROLE\_AUTHOR\_SALUTATION##  
##PROLE\_AUTHOR\_LASTNAME##:

Manuscript ID ##DOCUMENT\_ID## entitled  
"##DOCUMENT\_TITLE##" which you submitted to the  
##JOURNAL\_NAME##, has been reviewed. The comments of the  
reviewer(s) are included at the bottom of this letter.

Attach a file to this e-mail template:  
 No file chosen

Select manuscript file to attach:

File Name	Unattach
acceptanceform.doc	<input type="button" value="Delete"/>

Save and Preview  
  Save and Close  
  Close Window

All templates have the ability to have files attached to them, for example, if you need a copyright form sent to an author when the acceptance letter is sent.

Another template that may also need a file attached, might be the Reviewer Agreed e-mail if you wanted to send a reviewer journal specific instructions on how reviews should be conducted.

The PDF proof of a manuscript submission can be selected as a file attachment and added to email templates. Many reviewers want to see a copy of the PDF proof before they agree to review a manuscript.

Select manuscript file to attach:  
 ▾

The system will support the ability to attach the PDF proof to the following email templates:

- Decision Letters
- Invitation Emails
- Invitation Response Emails
- Emails Notifications and Reminders
- Hyperlink Emails (From within Ms Details)
- Various System emails

**Tip:** Any file you attach to a template should be a **PDF** and not a Word document.

## E-MAIL TAGS

E-mail tags are used in all templates. These tags act like a placeholder and know exactly what information to pull into an e-mail when it is sent from the system. To access the tag list, click on the **View E-mail Tags** icon located to the right of the **Subject** line in the Edit E-mail section of a template.

**Edit E-Mail**  
**Name** 

---

**From:**   
**To:**   
**Cc:**   
**Bcc:**   
**Subject:**   **View E-Mail Tags**  
**Body:**   
Dear ##PROLE\_AUTHOR\_SALUTATION##  
##PROLE\_AUTHOR\_LASTNAME##:  
Manuscript ID: ##DOCUMENT\_ID## entitled

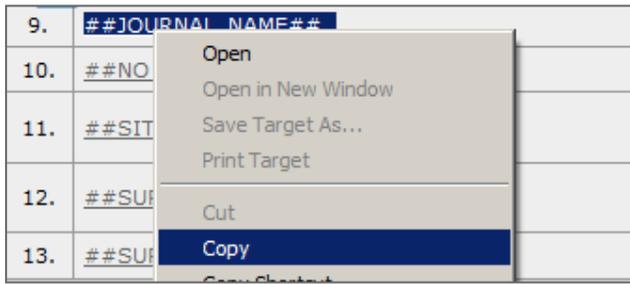
E-Mail Tags		
<b>Person Fields:</b> These tags will usually reflect the properties of the e-mail recipient (in some cases, the PROLE tags are used instead). If you are unsure of whether to use PERSON or PROLE tags, use the pre-configured e-mail templates available on your site as a guide.		
1.	##EXTERNAL_USER_ID##	External System User Id
2.	##PERSON_ADDRESS##	Person's full primary address (address line 1, address line 2, address line 3, city, state, country, postal code)
3.	##PERSON_ADDRESS_1##	Person's primary address line 1
4.	##PERSON_ADDRESS_2##	Person's primary address line 2
5.	##PERSON_ADDRESS_3##	Person's primary address line 3
6.	##PERSON_CC_EMAIL##	Person's Cc e-mail address
7.	##PERSON_CITY##	Person's city
8.	##PERSON_COUNTRY##	Person's country
9.	##PERSON_DEGREE##	Person's degree
10.	##PERSON_DEPARTMENT##	Person's department
11.	##PERSON_EMAIL##	Person's e-mail address and Person's Cc e-mail address
12.	##PERSON_FAX_1##	Person's primary fax number
13.	##PERSON_FAX_2##	Person's secondary fax number
14.	##PERSON_FIRSTNAME##	Person's first name (FirstName LastName)

The tag list is broken out into different sections:

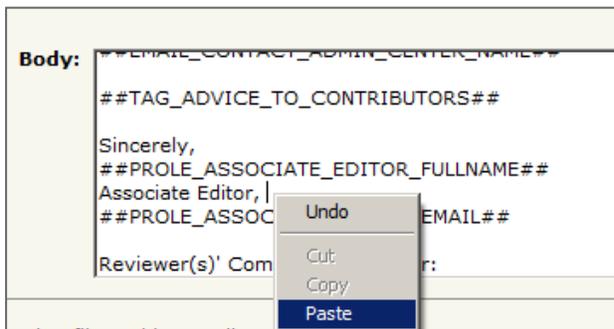
Type of Field	Description of Tag	Examples
Person Fields	These tags will usually reflect the properties of the e-mail recipient (in some cases, the PROLE tags are used instead)	First Name, Full Name, Country, User ID, Password
User Fields	These tags will reflect the properties of the user who is currently logged in to the system.	Same
Site Fields	These tags will contain journal-specific information. Some of these are pulled from the Configuration Settings fields that Admins complete.	Journal Name, Support Phone, Admin E-mail, Site URL
Document	These tags will reflect the properties of	Authors, Title, Date

Fields	the current manuscript.	Submitted, Abstract
Document Roles	These tags will reflect the properties of people associated with the manuscript. These can be used to represent either the sender or the recipient of the e-mail.	Author Full name, Reviewer E-mail, Associate Editor Institution
Attributes	These tags will reflect the attributes (keywords, areas of expertise) configured for the site.	Attributes, Keywords
Custom Questions	These tags will reflect the answers to any custom questions requested by the journal.	# of Color Figures, Conflict of Interest
Document Task Fields	These tags will reflect items concerning the peer review of the manuscript.	Editor Recommendation, Comments to Author
Invitation Fields	Invitation Fields	Invitation Responses Link
Invited Paper / MRW Fields	These fields will reflect items concerning Invited Papers and MRWs.	Topic Description, Topic Title
Transfer Document Fields	Transfer Document Fields	Target Journal, Target Admin Name
User Defined Fields	User Defined Fields	Editorial Board, Review Manager

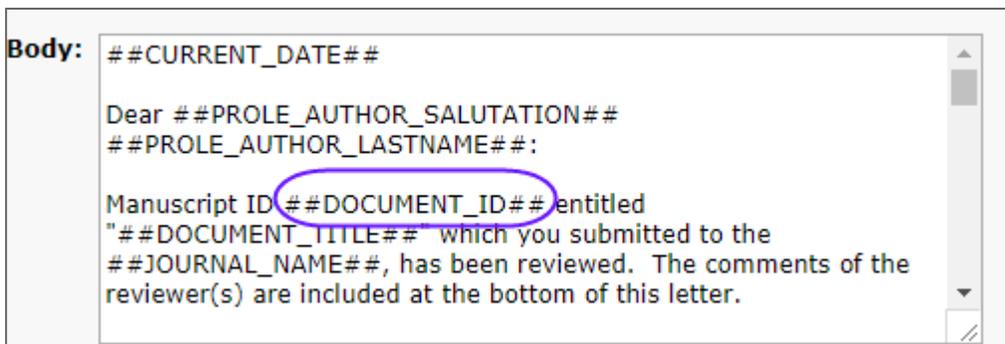
To add a tag into a template, highlight the tag with your mouse and then right-click to copy.



In the template, put your cursor where you want the tag to appear and right-click to paste.



The tag will then appear where you need it.

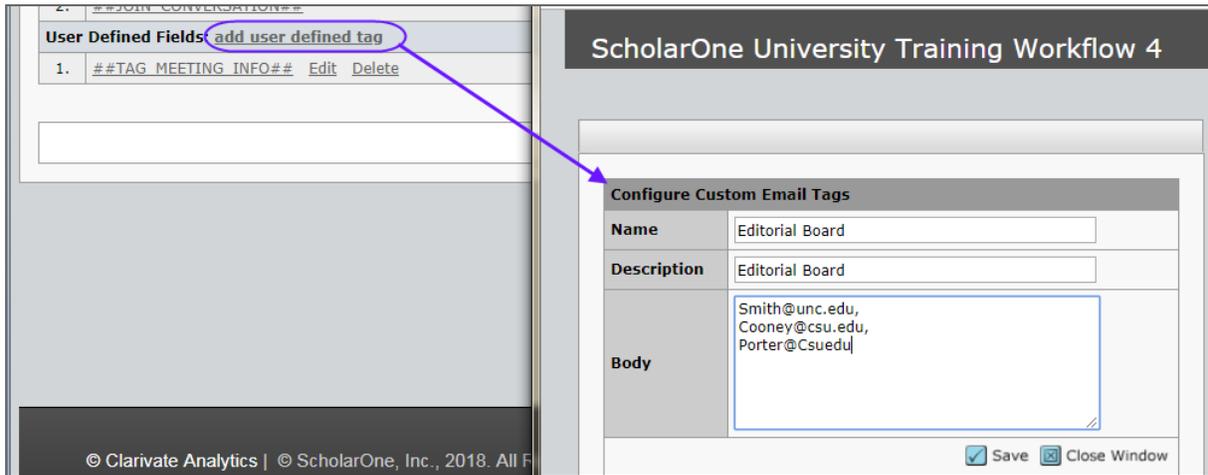


**Tip:** At the bottom of the tag list there is a button to export the tag list into a CSV file.



## ADDING USER DEFINED TAGS

At the bottom of the tag list there is a link to add User Defined Tags. These tags can be for journal specific items, such as the Editorial Board e-mail addresses, or even a link to the registration for the annual meeting for a society.



User Defined Fields: <a href="#">add user defined tag</a>		
1.	<a href="#">##TAG EDITORIAL BOARD##</a> <a href="#">Edit</a> <a href="#">Delete</a>	Editorial Board
2.	<a href="#">##TAG MEETING INFO##</a> <a href="#">Edit</a> <a href="#">Delete</a>	Meeting Info

## USING PROLE AND PERSON TAGS

**PROLE** describes the person or group of persons within a role. **PERSON** tag describes the single individual who needs to receive the e-mail.

Example: If you put a PROLE tag in the “**To**” field of a Reviewer Reminder all Reviewers would be notified about the one PERSON who is late.

Therefore, we use the PERSON tag in the “**To**” field of a Reviewer Reminder.

**Edit E-Mail**

**Name:**

---

**From:**

**To:**

**Cc:**

**Bcc:**

**Subject:**  [# View E-Mail Tags](#)

**Body:**

Dear ##PERSON\_SALUTATION## ##PERSON\_LASTNAME##:

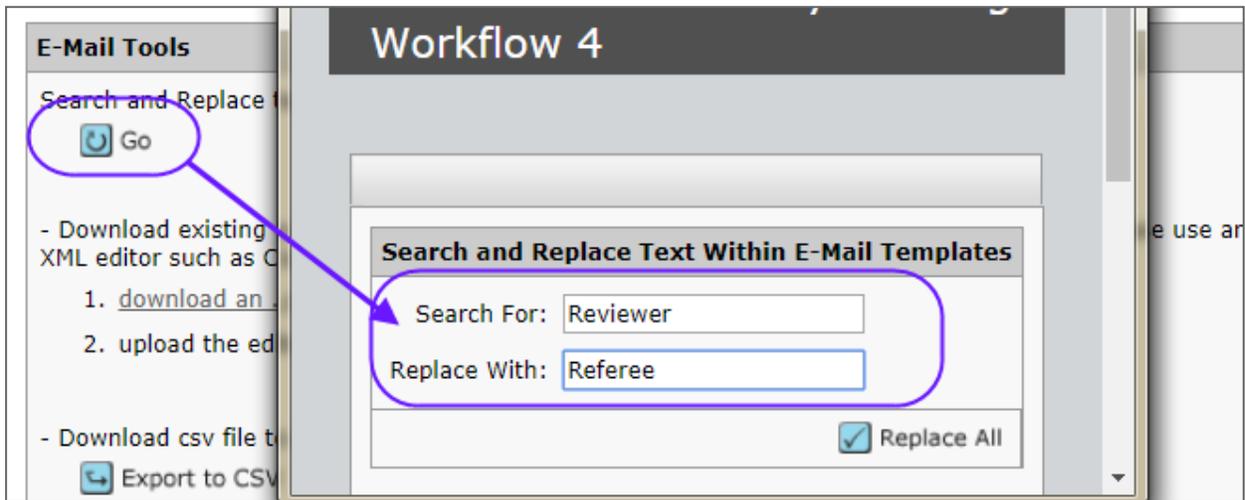
Recently, you agreed to review Manuscript ID ##DOCUMENT\_ID##, entitled "##DOCUMENT\_TITLE##." The manuscript is located in your Reviewer Center at ##SITE\_URL##.

This e-mail is simply a reminder that your review is due in one week. I appreciate your help in accomplishing our goal of having an

## E-MAIL TOOLS

### SEARCH AND REPLACE

This is the ability to search and replace text in the e-mail templates.



---

**Note:** This tool works across **all** templates not just a specific section of templates.

---

## XML

If you are familiar with XML, you can download all the templates in your site and edit them offline, and then upload the edited version.

---

**Note:** You cannot delete any items in the XML, as it will throw off the order of your templates when you upload the edited file.

---

**E-Mail Tools**

Search and Replace text within e-mail templates

 Go

- Download existing e-mail templates, edit them off-line, then upload the edited templates. Please use an XML editor such as [Cooktop](#) when editing this file.

1. [download an .xml.zip file containing current templates](#)

2. upload the edited .xml file:  No file chosen  Upload

- Download csv file to check whether or not E-mail templates have valid e-mail addresses.

 Export to CSV

---

**Tip:** If you are going to use the XML option, keep a copy of the original XML.

---

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