

Email Templates Guide

ScholarOne Manuscripts™

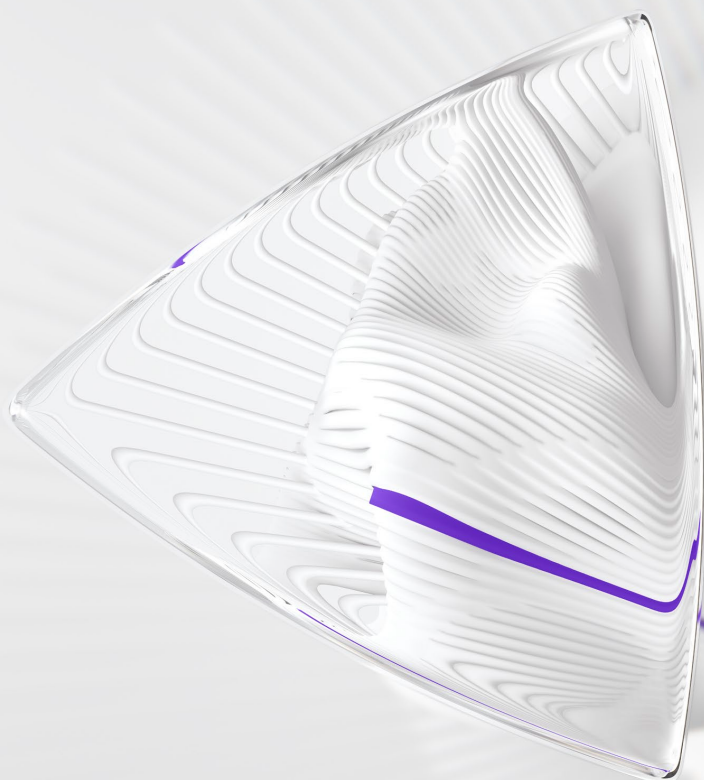
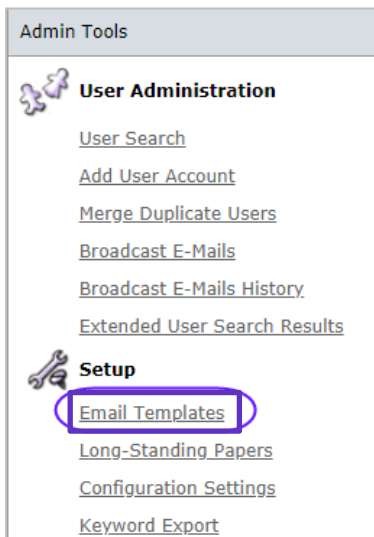


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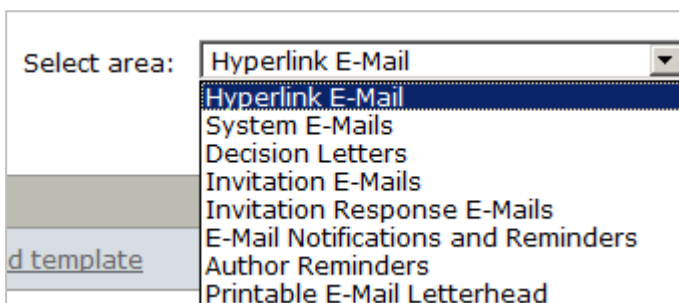
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Introduction

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:

The diagram illustrates the layout of an email notification table. Callouts point to the following elements:

- Section Heading:** Points to the header row of the table.
- Task:** Points to the first column header, 'Submitted Workflow Tasks'.
- Edit Before Sending:** Points to the second column header, 'Edit Before Sending'.
- Active:** Points to the fourth column header, 'Active'.
- When Task Enters? OR Reminder Days:** Points to the fifth and sixth column headers, 'When Task Enters?' and 'Reminder Days'.
- Modify:** Points to the seventh column header, 'Modify'.
- Delete:** Points to the eighth column header, 'Delete'.
- Updated:** Points to the ninth column header, 'Updated'.
- Template Name:** Points to the first data row, 'SW - Editor Assignments now due'.

Submitted Workflow Tasks	Edit Before Sending	iCal ?	Active	When Task Enters?	Reminder Days	Modify	Delete	Updated
? AE Assign Editor Lettters - add template								
SW - Editor Assignments now due	☐	iCal	☒	---	or 3			02-September-2019
SW - Awaiting AE Assignment	☐	☐	☐	Pending	or			02-September-2019
? AE Assigns Reviewers Letter - add template								

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.
iCal	iCal reminders are only used where the following tags are used: ##AUTHOR_DUE_DATE# ##REVIEW_TASK_DATE_DUE## ##TASK_DUE_DATE## ##STUB_SUBMISSION_DUE_DATE## ##TOPIC_SUBMISSION_DUE_DATE#
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.
Updated	The date the last time the templated was modified.

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”)

When Task Enters?	Reminder Days
--- --- Pending Processing Overdue Completed Abandoned Rescinded	or 3 or

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 the 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

When Task Enters?	Reminder Days
---	or -7
---	or 7
---	or 14

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

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

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.

Invitation E-Mails

Submitted Workflow Tasks	Edit Before Sending	iCal ?	Active	Required for Event?	Modify	Delete	Updated
req ? (Task: AE Invites Reviewers) AE Invites Reviewers - add template							
(SW) Editor Invitation to Reviewer	☒	☐	☒	☒			27-April-2022
Copy all of the e-mail templates configured for this workflow to the					☐ Re-Submitted Workflow Tasks ☐ Revised Workflow Tasks		
					☒ Save		

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 (MCU1-201507-0007-OA) Select Alternate Template: Invitation to Reviewer GO

From: qa-mc@manuscriptcentral.com

To: griff@test.demo

CC:

BCC:

Subject: Invitation to Review for the ScholarOne University Training Workflow 1

Body: unable to review at this time, I would appreciate you recommending another expert reviewer. You may e-mail me with your reply or click the appropriate link below to automatically register your reply with our online manuscript submission and review system.

*** 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-impl.manuscriptcentral.com/s1u-wf1?URL_MASK=4093985c08de4239a128729d0275fe1e

Declined: https://mc-impl.manuscriptcentral.com/s1u-wf1?URL_MASK=0431af0feb684fc6a9baac638eb00df4

Unavailable: https://mc-impl.manuscriptcentral.com/s1u-wf1?URL_MASK=b63030a15ebc41e1bf97b5232ee0a470

Once you accept my invitation to review this manuscript, you will be notified via e-mail about how to access Manuscript Central, our online manuscript submission and review system. You will then have access to the manuscript and reviewer instructions in your Reviewer Center.

I realize that our expert reviewers greatly contribute to the high standards of the Journal and I thank you for

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

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.

Invitation Response E-Mails

Submitted Workflow Tasks	Edit Before Sending	iCal	Active	Required for Event?	Modify	Delete	Updated
(Task: AE Invites Reviewers) AE Invites Reviewers - Auto-Denied - add template							
Auto Denied	☒	☐	☒	☒			14-March-2020
(Task: AE Invites Reviewers) AE Invites Reviewers - Declined via email - add template							
(Task: AE Invites Reviewers) AE Invites Reviewers - Agreed - add template							
SW - Reviewer Agreed	☒	☐	☒	☒			21-April-2022
(Task: AE Invites Reviewers) AE Invites Reviewers - Declined - add template							
SW - Reviewer Declined	☒	☐	☒	☒			11-April-2013
(Task: AE Invites Reviewers) AE Invites Reviewers - Late Response - add template							
SW - Reviewer Late Response	☒	☐	☒	☒			11-April-2013
(Task: AE Invites Reviewers) AE Invites Reviewers - No Response - add template							
SW - Reviewer No Response	☒	☐	☒	☒			11-April-2013
(Task: AE Invites Reviewers) AE Invites Reviewers - Unavailable - add template							
SW - Reviewer Unavailable	☒	☐	☒	☒			11-April-2013

Copy all of the e-mail templates configured for this workflow to the
 ☐ Re-Submitted Workflow Tasks
 ☐ Revised Workflow Tasks
 ☒ Save

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.

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 (MCU1-201507-0007-OA)
Select Alternate Template: SW - Reviewer Agreed
GO

From: qa-mc@manuscriptcentral.com

To: griff@test.demo

CC:

BCC:

Subject: Manuscript ID MCU1-201507-0007-OA now in your Reviewer Center - Sch

Body: Thank you for agreeing to review Manuscript ID MCU1-201507-0007-OA entitled "The Prevalence of Potentially Preventable Deaths in Acute Care Hospital" for the ScholarOne University Training Workflow 1.

Please try your best to complete your review by: 29-May-2022.

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 1 - Manuscript Central site at <https://mc-impl.manuscriptcentral.com/s1u-wf1>.

https://mc-beta.manuscriptcentral.com/s1u-wf1?URL_MASK=af0d1adc564f4dd6b56d3572452c5900

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.

Decision Letters							
Submitted Workflow Tasks	Edit Before Sending	iCal ?	Active	Required for Event?	Modify	Delete	Updated
req ? (Task: EIC Decision) Accept - add template							
SW - EIC Accept	☒	☐	☒	☒			17-January-2020
req ? (Task: EIC Decision) Minor Revision - add template							
Reviewer Thank you Letter	☒	☐	☒	☐			08-November-2019
SW - EIC Minor Revision	☒	☐	☒	☒			08-November-2019

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 Reviewers,

Thank you for working with our journal. Below are the comments made by the other reviewers on this manuscript.

Reviewer Comments:

##COMMENTS_TO_AUTHOR##

Author Reminders

The **Author Reminders** is 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.

Author Reminders						
Submitted Workflow Tasks	iCal ?	Active	Reminder Days	Modify	Delete	Updated
 (Task: EIC Decision) Minor Revision - add template						
SW – Minor Revision due in 2 weeks	☐	☒	-14			25-November-2019
 (Task: EIC Decision) Major Revision - add template						
SW – Major Revision due in 2 weeks	☐	☒	-14			05-October-2019
 (Task: EIC Decision) Reject & Resubmit - add template						
SW – Resubmission due in 2 weeks	☐	☒	-14			11-April-2013

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.

System E-Mails						
E-Mails for Authors / Co-Authors	Edit Before Sending	iCal ?	Active	Modify	Delete	Updated
req ? Manuscript is Unsubmitted - add template						
Your manuscript has been unsubmitted	☒	☐	☒			11-April-2013
req ? Manuscript is Withdrawn - add template						
Your manuscript has been withdrawn	☒	☐	☒			11-April-2013
? Appeal Decision Denied - add template						
Deny appeal to author	☐	☐	☒			17-August-2017
? Co-Author Account Created During Manuscript Submission - add template						
Co-Author Account Created	☐	☐	☒			07-December-2015
req ? First Look Manuscript Submission Confirmation - add template						
Author Submit Manuscript	☐	☐	☒			11-April-2013
req ? Invitation Manuscript Submission Confirmation - add template						
Author Submit Manuscript	☐	☐	☒			11-April-2013
req ? Original Manuscript Submission Confirmation - add template						
Author Submit Manuscript	☐	☐	☒			13-August-2019

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	iCal 	Active	Modify	Delete	Updated
 Author Invitation Reminder 1 - add template						
Author Invitation Reminder 1	☐	☐	☒			12-February-2020
 Author Invitation Reminder 2 - add template						
Author Invitation Reminder 2	☐	☐	☒			12-February-2020
 Unassign Author - add template						
Unassign Author	☒	☐	☒			12-February-2020
 Uninvite Author - add template						
Uninvite Author	☒	☐	☒			12-February-2020
						☒ 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	iCal ?	Active	Modify	Delete	Updated
? Create Associate Editor Account On-The-Fly From Pick - add template						
Create Associate Editor Account on the fly	☐	☐	☒			12-February-2020
? Create Reviewer Account On-The-Fly - add template						
Create Reviewer Account On-The-Fly	☐	☐	☒			05-September-2019
? Admin Add User - add template						
Admin Add User	☐	☐	☒			26-September-2019
req ? Admin Send Account Info - add template						
Admin Send Account Info	☒	☐	☒			26-September-2019
req ? User Account Creation Notification - add template						
Your account has been created	☐	☐	☒			07-December-2015
req ? User Account Modification Notification - add template						
Your account has been modified	☐	☐	☒			16-August-2019
req ? Forgot Password - add template						
Forgot Password	☐	☐	☒			14-June-2020
req ? User holds duplicate accounts - add template						
Duplicate Accounts : Unable to send information	☐	☐	☒			11-April-2013
? User Accounts Merged Away Notification - add template						
User Accounts Merged Away Notification	☐	☐	☒			05-April-2021
? Primary User Account Merge Notification - add template						
Primary User Account Merge Notification	☐	☐	☐			12-February-2020
req ? User Declined T&C - add template						
Account Removed by User request	☐	☐	☒			09-May-2018

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	iCal ?	Active	Modify	Delete	Updated
req ? Conversation Participant Notification - add template						
Notify Conversation Participant	☐	☐	☒			07-December-2016
? Author Approval of Transfer Manual Reminder - add template						
Request to transfer your manuscript	☒	☐	☐			12-February-2020
req ? Manuscript exported via email - add template						
Manuscript Exported Via E-Mail	☐	☐	☒			11-April-2013
req ? Export Manifest exported via email - add template						
req ? Conversation: Participant Reminder (Digest) - add template						
Remind Participant Weekly	☐	☐	☒			19-February-2019
? Electronic Form: PDF Failed to Generate - add template						
Electronic Form: PDF Failed to Generate	☐	☐	☒			12-February-2020
req ? Broadcast E-Mails - add template						
Broadcast E-Mail	☐	☐	☒			11-April-2013
End of Year Thanks!	☐	☐	☒			11-April-2013
req ? Manuscript Export Failed - add template						
Manuscript Failed to Export	☐	☐	☒			11-April-2013
? Manuscript Export Succeeded - add template						
Manuscript has been Exported	☐	☐	☒			11-April-2013

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	iCal 	Active	Modify	Delete	Updated
req  Hyperlink E-Mail (From Within Mss Details) - add template						
Hyperlink E-Mail (From Within Mss Details)	☒	☐	☒			24-September-2019
req  Hyperlink E-Mail (From Outside Mss Details) - add template						
Hyperlink E-Mail (From Outside Mss Details)	☒	☐	☒			11-April-2013
req  Author Hyperlink E-Mail (From Within Mss Details)						
Author Template	☒	☐	☒			14-November-2013
req  Reviewer Hyperlink E-Mail (From Within Mss Details)						
Reviewer Template	☒	☐	☒			14-November-2013
						 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.

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
ScholarOneLetterhead.rtf	☐	☒	☐
☒ Save			

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

SCHOLARONE™



##EMAIL_BODY##

Upload the file and make it Default and Active.

Printable Letterhead Template Files	Default	Active	Delete
ScholarOneLetterhead.rtf	☒	☒	☐
☒ Save			

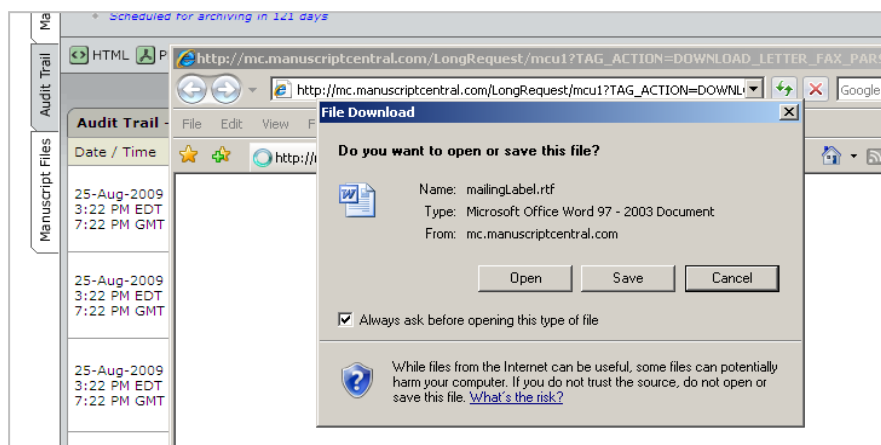
Tip: If needed, you can upload more than one letterhead.

How Printable E-mail Letterhead Works

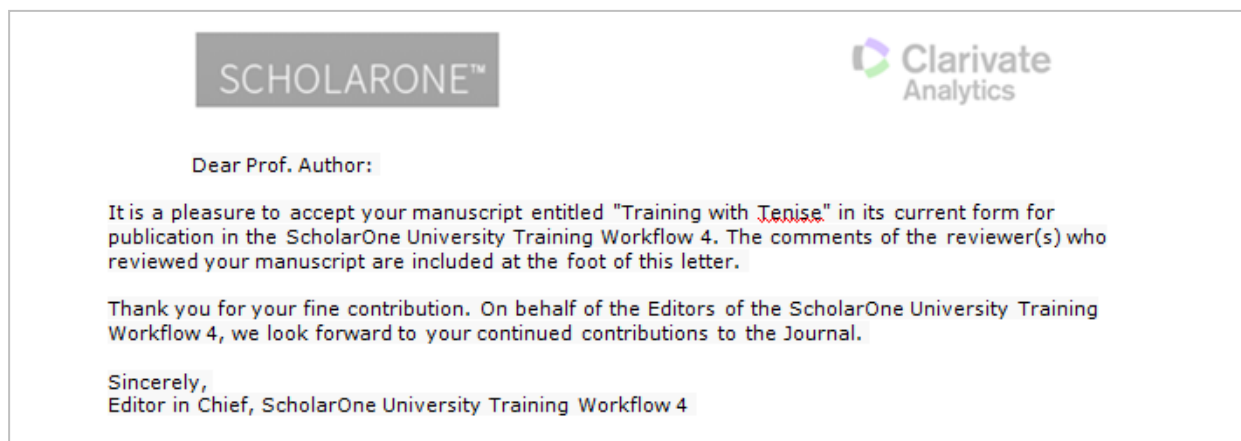
In the Audit Trail of each submission, you will see a new icon for each e-mail that has been sent from the system.

Audit Trail - view all / events only / letters only	
Date / Time	Event
30-Mar-2015 2:15 AM EDT 30-Mar-2015 6:15 AM GMT	 To: RachelReviewer@fakemail.com From: gwen.baker@test.demo Subject: Reminder: ScholarOne University Training Workflow 1 Results: Successfully sent.

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
req ?	Manuscript is Unsubmitted - add template	
	Your manuscript has been unsubmitted	☒
req ?	Manuscript is Withdrawn - add template	
	Your manuscript has been withdrawn	☒

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 - add template	
	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:
To:
Cc:
Bcc:
Subject: [# 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:

Files attached

File Name	Unattach
acceptanceform.docx	X 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
1. SW Minor Revision

From:
##PROLE_ASSOCIATE_EDITOR_EMAIL##

To:
##PROLE_AUTHOR_EMAIL##

Cc:

Bcc:

Subject:
##JOURNAL_NAME## - Decision on Manuscript II

View E-Mail Tags

Body:
##CURRENT_DATE##

Dear ##PROLE_AUTHOR_SALUTATION##
##PROLE_AUTHOR_LASTNAME##:

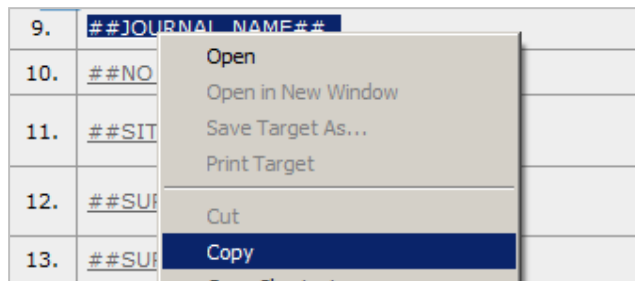
E-Mail Tags		
Person Fields: These tags will usually reflect the properties of the e-mail recipient (in some cases, the PROLE tags are used instead). If you are unsure of whether to use PERSON or PROLE tags, use the pre-configured e-mail templates available on your site as a guide.		
1.	##EXTERNAL_USER_ID##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

The tag list is broken out into different sections:

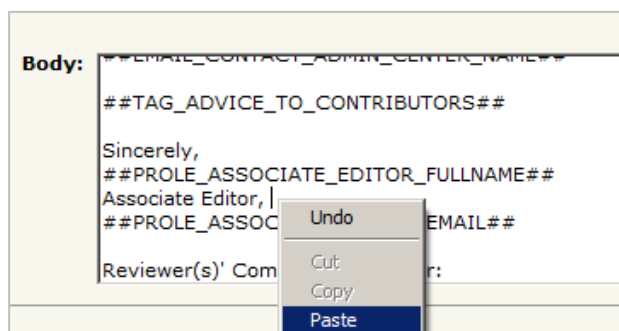
Type of Field	Description of Tag	Examples
Person Fields	These tags will usually reflect the properties of the e-mail recipient (in some cases, the PROLE tags are used instead)	First Name, Full Name, Country, User ID, Password
User Fields	These tags will reflect the properties of the user who is currently 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 Fields	These tags will reflect the properties of the current manuscript.	Authors, Title, Date 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.

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.

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



Export as CSV

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.

ScholarOne University Training Workflow 1

User Defined Fields: [add user defined tag](#)

3.	##JOIN CONVERSATION##	
4.	##UNREAD CONVERSATIONS LIST##	
1.	##TAG ANNUALMEETING##	Edit Delete
2.	##TAG EDITORIAL BOARD EMAIL ADDRESS	
3.	##TAG HAPPY HOLIDAYS##	Edit Delete

Configure Custom Email Tags

Name Editorial Board

Description Editorial Board

Body Ivana@unc.test
Darko@csu.edu

☒ Save ☐ Close Window

User Defined Fields: add user defined tag		
1.	##TAG ANNUALMEETING##	Edit Delete
2.	##TAG EDITORIAL BOARD EMAIL ADDRESSES##	Edit Delete
		Annual Meeting
		Editorial Board

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
SW - Reviewer Scores are due in 1 week

From:
##PROLE_ASSOCIATE_EDITOR_EMAIL##

To:
##PERSON_EMAIL##

Cc:

Bcc:

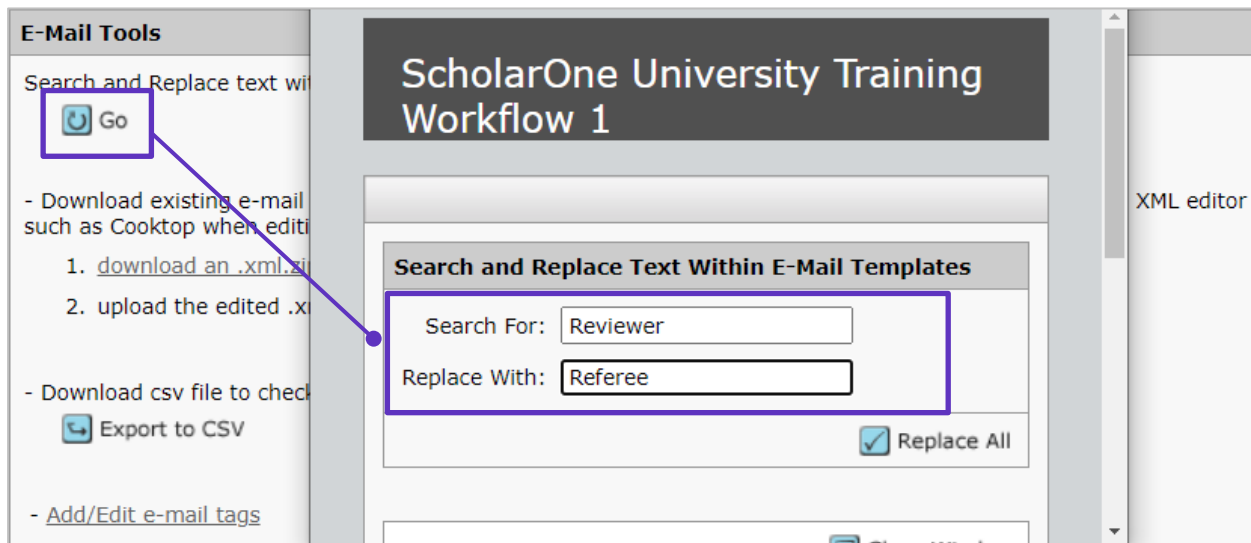
Subject:
Reminder number 1: ##JOURNAL_NAME##
View E-Mail Tags

Body:
##CURRENT_DATE##
##CUST_MANUSCRIPT_TYPE##
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##.

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.

If you require technical assistance, please contact Customer Care at s1help@clarivate.com.

About Clarivate

Clarivate™ is a global leader in providing solutions to accelerate the pace of innovation. Our bold mission is to help customers solve some of the world's most complex problems by providing actionable information and insights that reduce the time from new ideas to life-changing inventions in the areas of Academia & Government, Life Sciences & Healthcare, Professional Services and Consumer Goods, Manufacturing & Technology. We help customers discover, protect and commercialize their inventions using our trusted subscription and technology-based solutions coupled with deep domain expertise. For more information, please visit clarivate.com.

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