

# Mass User Account Management Guide



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- Mass Creation of User Accounts (for sites with single sign-on)
- Mass Updating User Accounts (with the import template)
- Mass User Transfers

# MASS CREATION OF USER ACCOUNTS

## For Sites without Single Sign-On (SSO)

A GUIDE FOR SCHOLARONE CONFERENCES

### BACKGROUND

You may wish to create new accounts in ScholarOne Conferences (S1C) for a number of reasons. Some common scenarios are included below.

- Adding Reviewers, Chairs, Hosts, Sessioners, and/or Invited Speakers from an external list.
- Importing accounts from your database in advance of the site opening, in order to simplify the process of adding co-authors to a submission.

Note that accounts can be imported at any time in batches throughout your meeting cycle.

The process for mass importing users to a site without Single Sign-On (SSO) is different than it is for a site with SSO. If your S1C site has SSO enabled, refer to the *Mass Creation of User Accounts for Sites with SSO* guide for instructions.

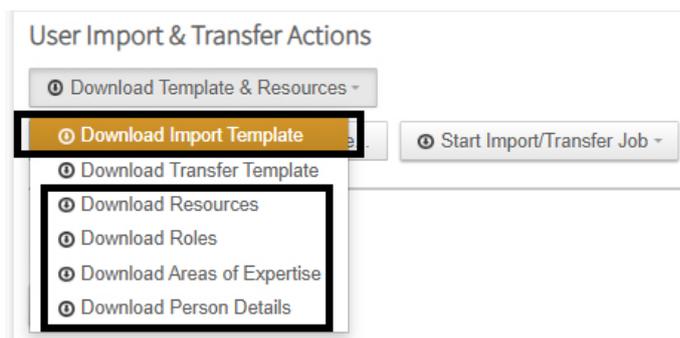
### INSTRUCTIONS

#### 1. Go to Admin-> Client Configuration-> Import-> User Import & Transfer

- Read the tips on this page.

#### 2. Download the following files from 'User Import & Transfer Actions'.

- Download the Import Template
- Download Roles
  - **Optional:** You may choose to assign non-default roles, such as Reviewer, Sessioner, etc., to the new accounts. Roles can also be assigned later using the same template.
- Download Areas of Expertise (AoE)
  - **Optional:** If your site collects AoE upon account creation, you may wish to assign AoE to Reviewer accounts at this time.



- You may need to download the *Resources, Roles, Areas of Expertise, or Person Details* from this list, depending on what you are importing. Please note that each site has its own unique IDs for Roles, Areas of Expertise, and Resources, which must be used in the Import Template.

### 3. Populate the Import template with at least First Name, Last Name, and Email.

- You may need to populate other columns if they are required for account creation on your site.
- If you would like to remove data from a specific field, insert **\*\*blank\*\*** into that field and import.
  - Note:** If a field is required in S1C, you cannot strip the value from that column by inserting **\*\*blank\*\***. Doing so will generate an error.
- Separate multiple Role and Area of Expertise IDs in one cell with a pipe: |.
  - For example: 49197 | 49198
- Save the file as a CSV UTF-8 in order to preserve special characters.
- Leave the Person ID column blank when creating new accounts. The Person ID will be generated by the system.
- It is not mandatory to enter a 'User ID'. If left blank, this will be generated by the system for new accounts.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Person ID	Salutation	First Name	Middle Name	Last Name	Suffix	Degree	Profession	Email Address	Institution	Department	Address1	Address2	City	Zip
		Michelle		Smith				test1@example.com						
		Clara		Vate				test2@example.com						
		Mirko		Miric				test3@example.com						
		Gregory		Clarke				test4@example.com						
		Isabelle		Bedford				test5@example.com						
		David		Forks				test6@example.com						

### 4. Optional: Assigning Roles

You will need the Role IDs from the 'User Import & Transfer Actions' -> 'Download Roles' file.

- Each site has its own unique Role IDs.
- Insert them into the 'Role ID' column of the Import Template.
- If one account should receive more than one role, separate the Role IDs with a pipe: |.
  - For example:** 49197 | 49198

A	B	C
Role ID	Role Type	Role Name
49196	Sessioner	Sessioner
49195	Session Center Admin	Session Center Admin
51889	Itinerary Planner	Itinerary Planner
49197	Reviewer	Review Center
49198	Reviewer	Review Center Admin

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
Person ID	Salutation	First Name	Middle Name	Last Name	Suffix	Degree	Profession	Email Address	Institution	Department	Address1	Address2	City	Zip	Country	State	Phone1	Phone2	Fax	User ID	Role ID
		Michelle		Smith				test1@example.com													49197   49198
		Clara		Vate				test2@example.com													49197   49198
		Mirko		Miric				test3@example.com													49197
		Gregory		Clarke				test4@example.com													49197
		Isabelle		Bedford				test5@example.com													49197
		David		Forks				test6@example.com													49197

### 5. Optional: Assigning Areas of Expertise

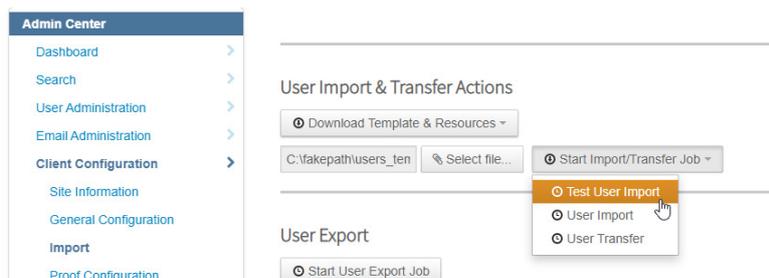
- AoE, also known as Categories or Topics that a reviewer has volunteered for are helpful to have in the system when assigning abstracts to reviewers. They will appear in the Reviewer Admin -> Assign Reviewers tab. However, this will not automatically assign submissions from a certain category to the reviewer. The assigning process would still be the same, but you could use filters to list only reviewers who have signed up for a particular category/topic, and the corresponding submissions.
- This can also be done later once the account is created through a re-import or manually within the account from the Admin Center -> Look up User Account -> Edit User -> Contact Information tab.

- You will need the AoE IDs from the ‘User Import & Transfer Actions’-> ‘Download Areas of Expertise’ file.
- Each site has its own unique AoE IDs.
- Insert the IDs into the ‘Area of Expertise’ column of the Import Template.
- If one account should be assigned more than one AoE, separate the AoE IDs with a pipe: |.
  - For example: 412996 | 346441 | 346561

A	B
Area of Expertise ID	Area of Expertise Name
412996	AAA
346441	Advanced CMCs: Processing, Evaluation, and Applications
346561	Advanced CMCs: Processing, Evaluation, and Applications: Ceramic matrix composites interphases (Oxide and non-oxide interphases)
346558	Advanced CMCs: Processing, Evaluation, and Applications: CMCs processing and fabrication methods
346562	Advanced CMCs: Processing, Evaluation, and Applications: Environmental protective coatings
346560	Advanced CMCs: Processing, Evaluation, and Applications: Extreme environmental effects of fibers and CMCs (oxidation and moisture effects)

C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
First Name	Middle Name	Last Name	Suffix	Degree	Professor	Email Address	Institution	Department	Address1	Address2	City	Zip	Country	State	Phone1	Phone2	Fax	User ID	Role ID	Member ID	Areas of Expertise
Michelle		Smith				test1@example.com												49197	49198		412996   346441   346561
Clara		Vate				test2@example.com												49197	49198		
Mirko		Miric				test3@example.com												49197			
Gregory		Clarke				test4@example.com												49197			
Isabelle		Bedford				test5@example.com												49197			
David		Forks				test6@example.com												49197			

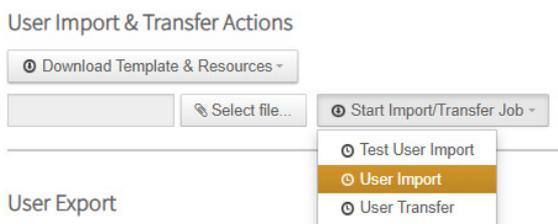
## 6. Test your Import file. This is mandatory for each import.



- Review the log for possible errors and resolve all issues.
- Common errors include the following.
  - Existing account based on Email Address or User ID
  - Invalid Resources
  - Invalid Role or AoE IDs

74657	User Import	Completed	Aug 17, 2022 6:53 AM	Aug 17, 2022 6:53 AM	1 imported 0 updated 0 failed	<a href="#">Download Log</a>
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## 7. Import your account updates.



- Please run only **one import at a time**.
- Each import **must contain fewer than 20K users**.

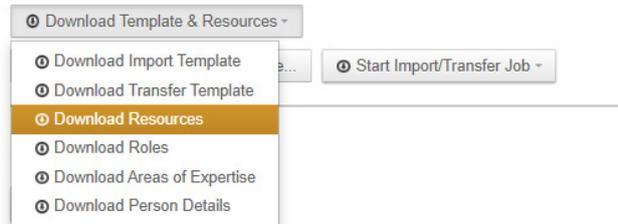
## COMMON IMPORT ERRORS

- Do not change the columns in the template; doing so will cause the import to fail. The template must be the original downloaded version.

74656	User Import	Completed	Aug 17, 2022 6:48 AM	Aug 17, 2022 6:48 AM	Failed. CSV Header is not valid. Can't proceed import
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- User Transfer and User Import are two different actions. The templates cannot be used interchangeably. Be sure to use the correct template.
- Save your file as a CSV UTF-8 to preserve special characters.
- Make sure you are downloading and populating your templates ONLY with the particular site's Resources (Role IDs, AoE IDs).
- Download the 'Resources' file to make sure you are populating the template with acceptable Country/ State names. ScholarOne has a defined set of available Countries and States and will not accept those that are not listed.

### User Import & Transfer Actions



- Any values for the City column must begin with a capital letter.
- The system will prevent you from creating duplicate accounts by checking for existing Person IDs, Emails, and Member IDs.

# MASS CREATION OF USER ACCOUNTS

## For Sites with Single Sign-On (SSO)

### A GUIDE FOR SCHOLARONE CONFERENCES

#### BACKGROUND

Although your ScholarOne Conferences (S1C) site may use Single Sign-On (SSO), which will bring accounts over from your system of record upon log in, you may wish to create new accounts in S1C before the users have logged in via SSO for a number of reasons. Some common scenarios are listed below.

- Adding Reviewers, Chairs, Hosts, Sessioners, and/or Invited Speakers from an external list so that their accounts are linked to assignments and invitations in S1C before they log in for the first time.
- Importing accounts from your database in advance of the S1C site opening in order to simplify the process of adding co-authors to a submission.

Note that accounts can be imported at any time in batches throughout your meeting cycle.

The process for mass importing users to a site with SSO is different than it is for a site without SSO. If your S1C site does not have SSO enabled, refer to the Mass Creation of User Accounts for Sites without SSO guide for instructions.

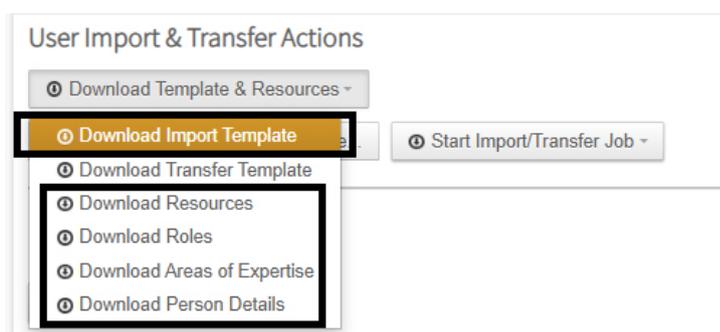
#### INSTRUCTIONS

##### 1. Go to Admin-> Client Configuration-> Import-> User Import & Transfer

- Read the tips on this page.

##### 2. Download the following files from 'User Import & Transfer Actions'

- Download the Import Template
- Download Roles
  - **Optional:** You may choose to assign non-default roles, such as Reviewer, Sessioner, etc., to the new accounts. Roles can also be assigned at a later time using the same template.
- Download Areas of Expertise
  - **Optional:** If your site collects AoE upon account creation, you may wish to assign AoE to Reviewer accounts at this time.



- You may need to download the *Resources, Roles, Areas of Expertise, or Person Details* from this list, depending on what you are importing. Please note that each site has its own unique IDs for Roles, Areas of Expertise, and Resources, which must be used in the Import Template.

### 3. Populate the Import template with at least First Name, Last Name, Email, and Member ID.

- You may need to populate other columns if they are required for account creation on your site.
- If you would like to remove data from a specific field, insert **\*\*blank\*\*** into that field and import.
  - Note:** If a field is required in S1C, you cannot strip the value from that column by inserting **\*\*blank\*\***. Doing so will generate an error.
- Separate multiple Role and Area of Expertise IDs in one cell with a pipe: |.
  - For example:** 49197 | 49198
- Save the file as a CSV UTF-8 in order to preserve special characters.
- Leave the Person ID column blank** when creating new accounts. This will be generated by the system.
- It is not mandatory to enter a ‘User ID’. If left blank, this will be generated by the system for new accounts. The user will not see/use this ID. They will use their regular society log in on your society website.

A	B	C	D	E	F	G	H	I	J	K	L
Person ID	Salutation	First Name	Middle Name	Last Name	Suffix	Degree	Professor	Email Address	Institution	Department	Address1
		Michelle		Smith				test1@example.com			
		Clara		Vate				test2@example.com			
		Mirko		Miric				test3@example.com			
		Gregory		Clarke				test4@example.com			
		Isabelle		Bedford				test5@example.com			

### 4. Optional: Assigning Roles

You will need the Role IDs from the ‘User Import & Transfer Actions’-> ‘Download Roles’ file.

- Each site has its own unique Role IDs.
- Insert them into the Role ID column of the Import Template.
- If one account should receive more than one role, separate the Role IDs with a pipe: |.
  - For example:** 49197 | 49198

	A	B	C
1	Role ID	Role Type	Role Name
2	49196	Sessioner	Sessioner
3	49195	Session Center Admin	Session Center Admin
4	51889	Itinerary Planner	Itinerary Planner
5	49197	Reviewer	Review Center
6	49198	Reviewer	Review Center Admin

B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
Salutation	First Name	Middle Name	Last Name	Suffix	Degree	Professor	Email Address	Institution	Department	Address1	Address2	City	Zip	Country	State	Phone1	Phone2	Fax	User ID	Role ID
	Michelle		Smith				test1@example.com													49197   49198
	Clara		Vate				test2@example.com													49197   49198
	Mirko		Miric				test3@example.com													49197
	Gregory		Clarke				test4@example.com													49197
	Isabelle		Bedford				test5@example.com													49197
	David		Forks				test6@example.com													49197

## 5. Optional: Assigning Areas of Expertise

- AoE, also known as Categories or Topics that a reviewer has volunteered for are helpful to have in the system when assigning abstracts to reviewers. They will appear in the Reviewer Admin-> Assign Reviewers tab. However, this will not automatically assign submissions from a certain category to the reviewer. The assigning process would still be the same, but you could use filters to list only reviewers who have signed up for a particular category/topic, and the corresponding submissions.
- This can also be done later once the account is created through a re-import or manually within the account from the Admin Center->Look up User Account-> Edit User-> Contact Information tab.
- You will need the AoE IDs from the ‘User Import & Transfer Actions’-> ‘Download Areas of Expertise’ file.
- Each site has its own unique AoE IDs.
- Insert them into the ‘Area of Expertise’ column of the Import Template.
- If one account should be assigned more than one AoE, separate the AoE IDs with a pipe: |
  - For example: 412996 | 346441 | 346561

A	B
Area of Expertise ID	Area of Expertise Name
412996	AAA
346441	Advanced CMCs: Processing, Evaluation, and Applications
346561	Advanced CMCs: Processing, Evaluation, and Applications: Ceramic matrix composites interphases (Oxide and non-oxide interphases)
346558	Advanced CMCs: Processing, Evaluation, and Applications: CMCs processing and fabrication methods
346562	Advanced CMCs: Processing, Evaluation, and Applications: Environmental protective coatings
346560	Advanced CMCs: Processing, Evaluation, and Applications: Extreme environmental effects of fibers and CMCs (oxidation and moisture effects)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
Person ID	Salutation	First Name	Middle Name	Last Name	Suffix	Degree	Profession	Email Address	Institution	Department	Address1	Address2	City	Zip	Country	State	Phone1	Phone2	Fax	User ID	Role ID	Member ID	Areas of Expertise
		Michelle		Smith				test1@example.com													49197	49198	412996   346441   346561
		Clara		Vate				test2@example.com													49197	49198	
		Mirko		Miric				test3@example.com													49197		
		Gregory		Clarke				test4@example.com													49197		
		Isabelle		Bedford				test5@example.com													49197		
		David		Forks				test6@example.com													49197		

## 6. There are two key differences between importing accounts for SSO sites vs non-SSO sites. Below is an explanation of these differences.

- The ‘Member ID’ is the most important field to add to your Import Template for SSO sites.
  - The field that is called ‘Member ID’ is how ScholarOne will ‘speak’ to your CRM/AMS. The account in your society database will be brought over to ScholarOne through SSO based on this ID. This is **the user’s ID in your system**. A user does not need to be a member of your society. That is just the name of the field. It may be called something different in the system you use. These values need to be exported from your system and inserted into the Import Template.
  - If the Member ID is left blank, the two systems will not know how to link the two accounts. Duplicate accounts without the correct role permission will be created upon log in. Duplicate accounts can be merged later manually.

Person ID	Salutation	First Name	Middle Name	Last Name	Suffix	Degree	Profession	Email Address	Institution	Department	Address1	Address2	City	Zip	Country	State	Phone1	Phone2	Fax	User ID	Role ID	Member ID	Areas of E
		Michelle		Smith				test1@example.com													49197	49198	123456
		Clara		Vate				test2@example.com													49197	49198	123457
		Mirko		Miric				test3@example.com													49197		123458
		Gregory		Clarke				test4@example.com													49197		123459
		Isabelle		Bedford				test5@example.com													49197		123450
		David		Forks				test6@example.com													49197		123460

**Stojanovic, Mina**

 Proxy  Edit

(Last in: Mar 8, 2022 5:40 AM EST)

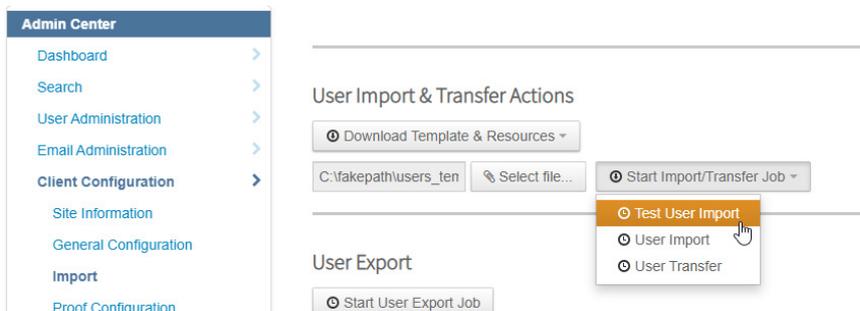
Member ID: 288939

- Please check that any leading 0 (zeros) in Member IDs remain intact. Excel often strips the leading 0s. If a Member ID has leading 0s and is imported without them, this will cause the ID to not be recognized, and a duplicate account will be created for the user.

- b. When a user signs into S1C using SSO, most fields in S1A will update with the information from your Society Database.
  - Apart from the basic information you will need to add to the Import Template (First Name, Last Name, Email, Member ID), you can also populate additional columns. Please note, for example, that even though you may have entered a new email address in the import template, unless that same update has been made in your database, when the user logs in through SSO, the data from your records will overwrite the existing account information in S1C. **Make sure to update your system of record with any changes to the account information.**

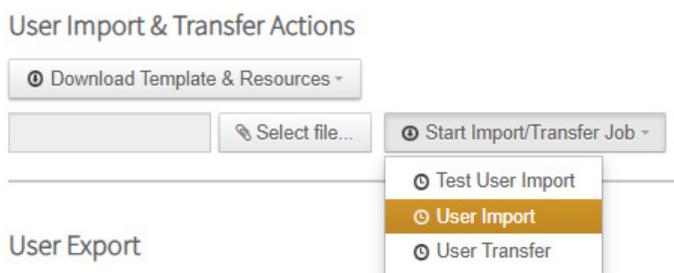
**7. Test Import. You are required to perform a test before the full import will execute.**

- Each User Import first requires a test. This will catch any errors in your file.
- Save your file as a CSV UTF-8 to preserve special characters.
- You are now ready to Select your file.
- Depending on the number of users, this may take a while (from a few minutes, to several hours).
- Once the test import has been completed, a log will be generated.



- Review the log for possible errors, such as the ones listed below.
  - Existing account based on Email Address
  - Existing account based on Person ID
  - Existing account based on Member ID
  - Invalid Role or Area of Expertise IDs
- Correct or remove the accounts with errors prior to the actual import.

**8. Import your new accounts.**



- A log will be generated once the import has been completed.
- Run **only one import at a time.**
- Each import **must contain fewer than 20K users.**

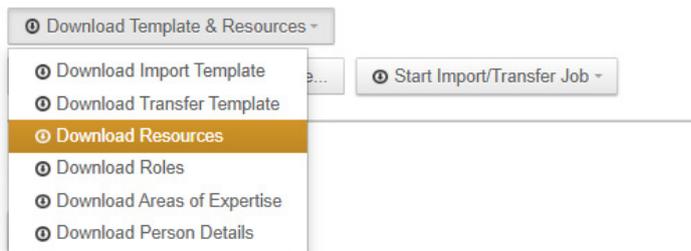
## COMMON IMPORT ERRORS

- Do not change the columns in the template; doing so will cause the import to fail. The template must be the original downloaded version.

74656	User Import	Completed	Aug 17, 2022 6:48 AM	Aug 17, 2022 6:48 AM	Failed. CSV Header is not valid. Can't proceed import.
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- User Transfer and User Import are two different actions. The templates cannot be used interchangeably. Please use the correct template.
- Save your file as a CSV UTF-8 to preserve special characters.
- Make sure you are downloading and populating your templates ONLY with the particular site’s Resources (Role IDs, AoE IDs).
- Download the ‘Resources’ file to make sure you are populating the template with acceptable Country/State names. ScholarOne has a defined set of available Countries and States and will not accept those that are not listed.

### User Import & Transfer Actions



- Any value in the City column must begin with a capital letter.
- The system will prevent you from creating duplicate accounts by checking for existing Person IDs, Emails, and Member IDs.

# MASS UPDATING USER ACCOUNTS

## With the Import Template

A GUIDE FOR SCHOLARONE CONFERENCES

### BACKGROUND

You may wish to update existing accounts in ScholarOne Conferences (S1C) for a number of reasons. Some common scenarios are listed below.

- Correcting typos and spelling mistakes in the Name or Institution fields
- Granting additional roles such as Reviewer or Sessioner en masse
- Assigning Areas of Expertise
- Filling in missing account information such as the Institution or Degree fields

### INSTRUCTIONS

1. Go to Admin-> Client Configuration-> Import-> User Import & Transfer.
2. Click on ‘Start User Export’.

#### User Export

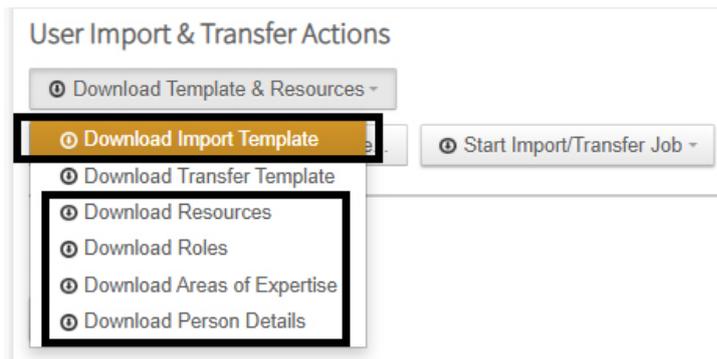
#### User Export Log

JOB ID	JOB TYPE	STATUS	START DATE	COMPLETED DATE	MESSAGE
77951	User Export	Completed	Mar 2, 2023 9:58 AM	Mar 2, 2023 9:58 AM	Success. 26 users exported. export_Bedford_Zoranovic_.csv

- You will need this list export to obtain the users’ Person IDs. The Person ID is a unique ID that identifies the user in S1A. This is how the system will know which existing account to update.
- Depending on how many users there are on your site, this may take a while (from a few minutes, to several hours).
- More than one file could be generated.

Person ID	Salutation	First Name	Middle Name	Last Name	Suffix	Degree	Profession	Email Address	Institution
5834657	Mrs.	Katherine		Bedford				eighthemail@testemail.org	
5834654	Mr.	Wilber		Grant				fifthemail@testemail.org	Tecnologico de Estudi
7069628	Prof.	Wilbur	M.	Grant	Sr	Dr		test123@clarivate.com	
5834649	Mrs.	Maria		Hernandez				secondemail@testemail.org	ScholarOne
5834655	Mr.	Steven		Holmes				sixthemail@testemail.org	

### 3. Download the ‘Import Template’ from the ‘User Import & Transfer Actions.’



- You may need to download the *Resources, Roles, Areas of Expertise, or Person Details* from this list, depending on what you are importing. Please note that each site has its own unique IDs for Roles, Areas of Expertise, and Resources, which must be used in the Import Template.

### 4. Populate the ‘Person ID’ column of the Import Template.

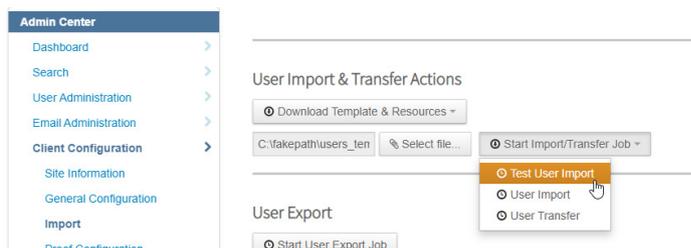
A	B	C	D	E	F
Person ID	Salutation	First Name	Middle Name	Last Name	Suffix
5834657					
5834654					
7069628					
5834649					
5834655					
6693142					

### 5. Proceed to populate the fields/columns that you would like to update via the import sheet.

- Leave all columns that do not need updating blank. This will not remove the existing data from the account.
- If you would like to remove data from a specific field, insert **\*\*blank\*\*** into that field and import.
  - Note:** If a field is required in S1C, you cannot strip the value from that column by inserting **\*\*blank\*\***. Doing so will generate an error.
- Separate multiple Role and Area of Expertise IDs in one cell with a pipe: |.
  - For example:** 49197 | 49198
- Save the file as a CSV UTF-8 in order to preserve special characters.
- Below is an example of a populated import template for updating account information.
  - Note:** Only the cells highlighted green will be imported for the respective Person IDs. All other (empty) fields will retain previous data. There is no need to retype this data into the import template.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
Person ID	Salutation	First Name	Middle Name	Last Name	Suffix	Degree	Professional Title	Email Address	Institution	Department	Address1	Address2	City	Zip	Country	State	Phone1	Phone2	Fax	User ID	Role ID	Member ID	Areas of Expertise
5834657									University of Toronto												49197		
5834654									Tecnologico de Estudios Superiores de Tianguistenco												49197   49198		412996   346441
7069628		Jose																			49197   49198		412996   346441   3464561

### 6. Test your Import file. This is mandatory for each import.



7. Review the log for possible errors and resolve all issues. Common errors are listed below.

- Existing account based on Email Address
- Existing account based on Person ID
- Invalid Role IDs

68411	User Import	Completed	Sep 1, 2021 4:38 AM	Sep 1, 2021 4:38 AM	0 imported <b>1 updated</b> 0 failed	<a href="#">Download Log</a>
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8. Import your account updates.

User Import & Transfer Actions

[Download Template & Resources](#)

[Select file...](#) [Start Import/Transfer Job](#)

User Export

- Test User Import
- User Import**
- User Transfer

- Please run **only one import at a time**.
- Each import **must contain fewer than 20K users**.

COMMON IMPORT ERRORS

- **Do not change the columns in the templates;** doing so will cause the import to fail. The template must be the original downloaded version.

74656	User Import	Completed	Aug 17, 2022 6:48 AM	Aug 17, 2022 6:48 AM	<b>Failed. CSV Header is not valid. Can't proceed import.</b>
-------	-------------	-----------	----------------------	----------------------	---

- User Transfer and User Import are two different actions. The templates cannot be used interchangeably. Please use the correct template.
- **Save your file as a CSV UTF-8 to preserve special characters.**
- Make sure you download and populate your templates ONLY with the particular site’s Resources (Role IDs, AoE IDs). Each site has unique resource values.
- Download the ‘Resources’ file to make sure you are populating the template with acceptable Country/State names. ScholarOne has a defined set of available Countries and States and will not accept those that are not listed.

User Import & Transfer Actions

[Download Template & Resources](#)

[Download Import Template](#) [Select file...](#) [Start Import/Transfer Job](#)

[Download Transfer Template](#)

**[Download Resources](#)**

[Download Roles](#)

[Download Areas of Expertise](#)

[Download Person Details](#)

- Any value entered into the City column must begin with a capital letter.

# MASS USER TRANSFERS

## A GUIDE FOR SCHOLARONE CONFERENCES

### BACKGROUND

When building a new ScholarOne Conferences (S1C) site, only accounts with Administrator access are automatically transferred from one site to the next.

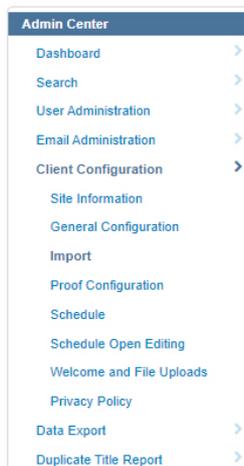
You may wish to transfer additional existing user accounts from one site to another across S1C for a number of reasons. Some common scenarios are listed below.

- Users do not have to create a new account for each S1C site. If transferred in, they can use the same credentials (user name and password) they used on older sites. Logging in is as simple as entering their previous credentials or resetting their password using the email address linked to their account.
- Submitters have a larger pool of co-authors to choose from. When creating a submission, submitters with co-authors are required to first search the system for existing accounts to avoid creating duplicate accounts. If an account cannot be found, they must create a new account for their co-author. Finding accounts when searching for co-authors can help reduce submission time and prevent errors during account creation.
- Site administrators can save time by having accounts already set up when a new site goes live. The following actions require user accounts in the site: assigning additional Roles, assigning Categories for Review, assigning Areas of Expertise, and sending emails and invitations to Invited Speakers/Faculty in advance of the user signing into the site for the first time

### INSTRUCTIONS

#### 1. Go to your previous submission site.

- Admin-> Client Configuration-> Import tab-> User Import and Transfer.



#### User Import & Transfer

[Import/Update Abstracts](#) [User Import & Transfer](#) [Category Assignments](#)

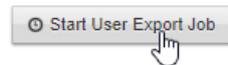
- This page can be used to create new accounts, update existing accounts, or transfer users from another site.
- To begin, download the transfer or import file and resource files.
- Use the template provided to create the import or update file. Save as a .csv when done and import in the area below. For new imports or user updates, a fully successful test is recommended before the final import is done.
- Transfers from different sites must be done individually. You will need the person ID and the site's short name. The URL `https://example.abstractcentral.com/`, the shortname is "example".

**Important tips:** Errant Imports or Transfers could incur costs to resolve data issues. When in doubt, check with your Client Implementation Manager.

- Wait until one import or transfer is finished before beginning another.
- Split each file into fewer than 20k users.
- Leave the person ID field blank if you are creating a new account; include the person ID if you are updating an existing account.
- To remove previous data, insert ""blank"" in the value column of the template. Person ID cannot be removed or changed from existing accounts.
- Any accounts left in an incomplete state due to an update will need to be corrected by the user or society.
- Save imports & updates as a UTF-8 CSV file to preserve most special characters.
- If you are importing member IDs, be sure to preserve leading zeroes, as Excel will strip them out by default.
- When adding roles to users, separate role IDs by a |.
- There is no process to cancel once the import/update or transfer has started.

2. Export the list of users.

User Export

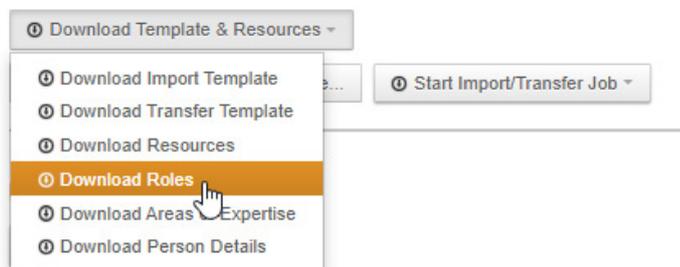


User Export Log

JOB ID	JOB TYPE	STATUS	START DATE	COMPLETED DATE	MESSAGE
60245	User Export	Completed	Apr 30, 2020 4:51 AM	Apr 30, 2020 4:51 AM	Success. 13 users exported. <a href="#">export_Bedford_Wilson_.csv</a>

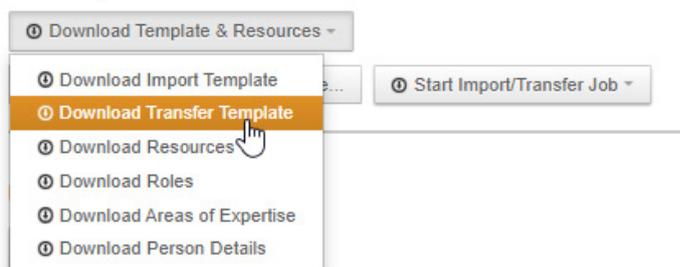
3. Download the 'Roles' template. This will help you determine which roles users had on your previous submission site.

User Import & Transfer Actions



4. Clean the list of exported users. Delete any duplicates or user accounts you do not wish to transfer. Admin accounts are the only user accounts which are transferred automatically during the site copy. Admin accounts will already have all roles and can be removed from this list.

User Import & Transfer Actions



5. Download the Transfer Template.

	A	B	C	D	E	F	G
1	Person ID	Salutation	First Name	Middle Name	Last Name	Suffix	Degree
2	6669439		Hernande Jose		A.		Ms
3	6527955		Ramesh		Abhari		
4	6995179		Mohammad		Abu Khater		
5	6959034	Mr.	Robert		Achatz		MSEE

6. For the users you wish you transfer, copy the Person ID from the User Export and paste those Person IDs into the appropriate column in the Transfer Template.

	A	B
1	Person ID	Role ID
2	6669439	
3	6527955	
4	6995179	
5	6959034	

- Copying the Person ID from the User Export.
- Pasting the Person ID into the Transfer Template.

If only giving default (submission) roles, this is the last step. The Role ID column will remain blank.

7. To add additional roles to your users, download the ROLE IDs template from the current site.

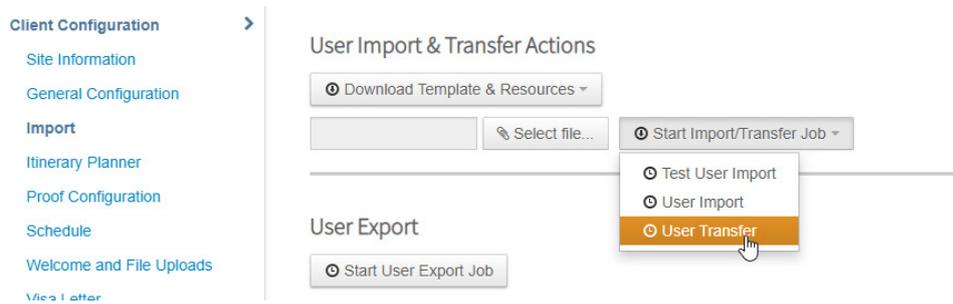
User Import & Transfer Actions

	A	B	C	D	E	F
1	Role ID	Role Type	Role Name	Opening Date	Display Deadline	Actual Deadline
2	49196	Sessioner	Sessioner	1/23/2019 9:00	7/1/2019 23:59	7/1/2019 23:59
3	49195	Session Center Admin	Session Center Admin	1/23/2019 9:00	7/15/2019 23:59	7/15/2019 23:59
4	51889	Itinerary Planner	Itinerary Planner	3/30/2020 7:31	4/30/2020 7:31	4/30/2020 7:31
5	49197	Reviewer	Review Center	1/23/2019 9:00	5/30/2019 23:59	5/30/2019 23:59
6	49198	Reviewer	Review Center Admin	1/23/2019 9:00	5/30/2019 23:59	5/30/2019 23:59
7	49189	Submission	AAPG	1/24/2019 9:00	11/14/2022 23:59	11/15/2022 1:00
8	49190	Submission	Original Submission	1/24/2019 9:00	5/23/2019 23:59	5/23/2019 23:59
9	49192	Submission	STF Paper	1/24/2019 9:00	5/23/2019 23:59	5/23/2019 23:59
10	49191	Submission	Case Report	1/24/2019 9:00	5/23/2019 23:59	5/23/2019 23:59
11	50899	Abstract Submission Stub	Submission Stub	10/18/2019 6:57	7/31/2020 6:57	7/31/2020 6:57
12	49194	Admin	Admin Centre	1/24/2019 9:00	12/2/2020 23:59	12/2/2020 23:59

- Each ScholarOne site will have its own set of Role IDs. It is important to assign the correct Role IDs to the user.
- If a user requires more than one role (any Reviewer, Sessioner or Admin role), separate the different Role IDs with a pipe: |
  - **For example:** For example: 49197 | 49198
- Submission roles are configured as default, meaning that each user will have access to submit upon login. There is no need to add these roles to the transfer template. If a user is to have only the submission role, then the Role ID column should remain blank.

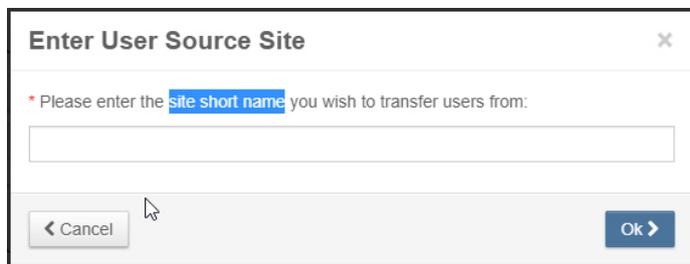
	A	B	C
	Person ID	Role ID	
	5834657	49197	
	5834654	49197   49196	
	5834649		<-- Default / Submission roles only
	5834655	49197   49196   50899	

8. Navigate to the current submission site -> Admin-> Client Configuration-> Import-> User Import & Transfer Tab-> Upload your transfer template and select 'User Transfer'



9. Enter the site you wish to transfer the users from.

- For example: www.<<site short name>>.abstractcentral.com



10. The transfer can take several minutes, depending on the number of users. After the transfer is complete a log will be generated where you can double check if all accounts have been transferred successfully.

COMMON TRANSFER ERRORS

- Wait until one import or transfer is finished before beginning another.
- Split each file into fewer than 20k users.
- To remove previous data, insert **\*\*blank\*\*** in the value column of the template.
- Person ID cannot be removed or changed from existing accounts.
- Any accounts left in an incomplete state due to an update will need to be corrected by the user or society.
- Save imports and updates as a UTF-8 CSV file to preserve most special characters.
- When adding roles to users, separate role IDs with a pipe: |.
  - **For example:** For example: 49197 | 49198
- There is no process to cancel once the transfer has started.
- Never change the headings for import templates, if the file is changed, the import will fail.

75855	Test User Import	Completed	Oct 31, 2022 1:13 PM	Oct 31, 2022 1:13 PM	Failed. CSV Header is not valid. Can't proceed import.
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