



**SCHOLARONE**  
CONFERENCES

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# Administrator User Guide

*Updated April 2025*



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## INTRODUCTION

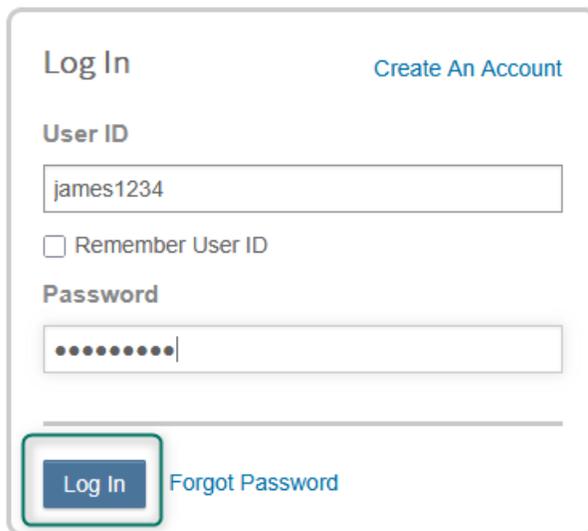
The Admin Center for ScholarOne Conferences gives you flexibility in searches and emails, self-service tools, and an intuitive user interface. It has been designed around usability and convenience. The Admin center has been configured for responsive design. The system automatically identifies the device type (laptop, tablet, mobile phone, etc.) and adjusts the layout accordingly.

The following guide provides you, the Admin, with a reference tool for navigating the **Admin Center**.

ScholarOne Conferences is configured for each Society's needs. For that reason, you may see features described in this guide that are not configured on your system.

## LOGGING INTO YOUR SCHOLARONE CONFERENCE S SITE

To access your meeting site, enter your site's URL in the browser address bar. You will land on the Login Page. From there, enter your **User ID** and **Password**. Click **Log In**.



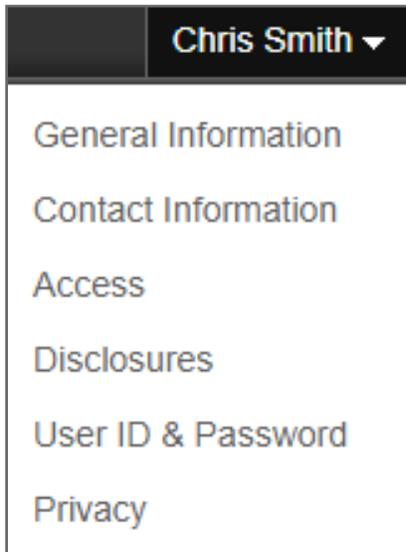
The screenshot shows a login form with the following elements:

- Log In** (text) and [Create An Account](#) (link)
- User ID** label above a text input field containing "james1234"
- Remember User ID
- Password** label above a password input field with masked characters "....."
- Log In** button (highlighted with a red box) and [Forgot Password](#) link

If you have forgotten your password, use the **Forgot Password** link on the **Login** page. Click on the link, enter your email address and an email will be sent to you with your User Id and a link to change your password. All passwords are encrypted and are not viewable by any user of the system.

## UPDATING YOUR ACCOUNT

Once you enter the system, you may update any of your account information by clicking on your name in the top right of the screen. Click on the dropdown options to access each portion of your account.



## CUSTOM QUESTIONS

Some societies may include custom questions as part of the account creation process. If a user has already created an account, he or she will be prompted at the next login to answer the required questions. These custom questions can be configured to be completed by Admins only or to be completed by the users only.

### Contact Points

* Phone 1	Phone 2
<input type="text" value="555-555-1245"/>	<input type="text" value="4349537445"/>
* Email	* Re-enter Email
<input type="text" value="christina.porter@123never.123send.com"/>	<input type="text" value="christina.porter@123never.123send.com"/>
Twitter Profile	LinkedIn Profile
<input type="text" value="@TwitterUsername"/>	<input type="text" value="www.linkedin.com/linkedinusername"/>

\* Prior Attendance at Annual Meetings

Have you attended an Annual Conference in the past?

Yes

No

---

**Note:** To report on Custom Questions, select the Custom Question in the “Select Search Criteria” field for People Searches. The custom question selection will start with “Abstract Detail:”.

---

## DISCLOSURES

There are two types of user disclosures. Those that rest on the account, **person-based disclosures**, and those that are submitted through the **Message** dropdown for review.

### Person-Based Disclosures

Person-based disclosures can be found on Step 4 of the account. Users will complete society-specific disclosures when the user creates an account or updates the account information. Disclosures include conflict of interest statements or other society-specific disclosures.

**\* Financial Disclosure - ScholarOne**

As a sponsor accredited by ScholarOne, the Company must ensure that its individually sponsored or jointly sponsored CME activities are independent and free of commercial bias. All in a position to control the content of an CME activity – speakers, authors, planning committee members, organizers, moderators and staff must disclose all relevant financial interest or other relationship occurring within the past 12 months with (1) with the manufacturer(s) of any commercial product(s) and/or provider(s) of commercial services discussed in an educational presentation and (2) with any commercial supporters of the activity. ("Relevant" financial interest or other relationships can include such things as grants or research support, employee, consultant, major stockholder, member of speakers' bureau, etc.). The intent of this disclosure is not to prevent anyone with a relevant financial or other relationship from participating, but rather to provide listeners with information on which they can make their own judgments. It remains for the audience to determine whether the speaker's or author's/contributor's interests or relationships may influence the presentation with regard to exposition or conclusion. **The Society will disqualify any individual who refuses to disclose relevant financial relationships.**

To submit an abstract for presentation at the Annual Meeting, the author must disclose for all authors all financial relationships by answering the following questions:

Does this author have any relevant financial interest/arrangement or affiliation within the past 12 months to disclose?

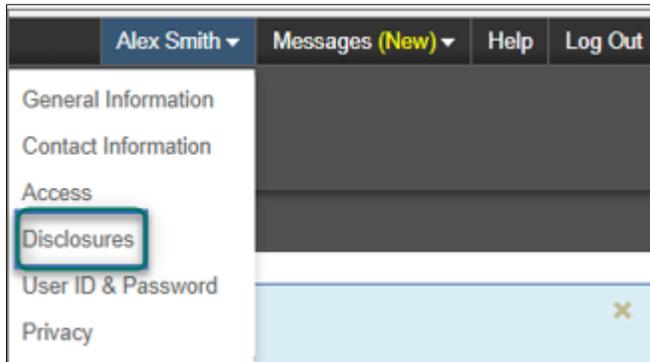
No, I have no affiliations or financial interests in relation to this program.  
 Yes, I have affiliations or financial interests in relation to this program.

If you answered Yes to the above question, please disclose, for all authors, all relevant financial interests or other relationships below:

---

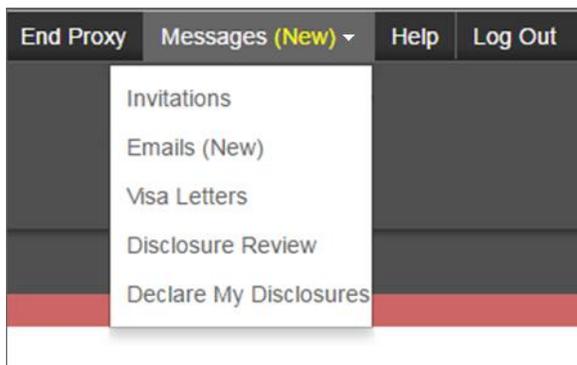
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A user can update their disclosure at any time by clicking on their name and selecting **Disclosures**.



## Disclosures for Review

If configured, users can submit their **Conflicts of Interest** for review in the system. In some cases, Presenters and/or Hosts will have a disclosure that pertains to a specific activity or presentation, but that does not apply to all presentations in which they are involved. Presenters and hosts can declare their specific conflicts of interest through the **Message** tab at the top right of each screen. The user will select **Declare My Disclosures** if he or she is a presenter or host.



## Presenter and Host Disclosure Declaration

If configured, once the presenter or session host has declared the disclosure's relevancy to his/her activities, an email will be triggered to the session host (for presenters) or the session owner (for session hosts) so that the information can be reviewed. Additionally, the session host and session owner will be able to see all the presenters and whether they have

submitted their disclosures for review (see below). The email templates can be found under **Email Administration > System Emails**.

### Declare My Disclosures

Role: Presenter, Co-Author

**Session Title:** [General Duality \(Excluding a Certain Notion of Anomaly Matching\) Obtained From Divisors](#)  
**Session Type:** Educational Course  
**Day:** 06-19-2017  
**Times:** 10:30 - 11:30  
**Location:** Greenbrier Ballroom B (Greenbrier Hotel)  
**Session Moderators:** Toby Flenderson, Tom Haverford

ABSTRACT TITLE / TIMES	DISCLOSURE	CONFLICT OF INTEREST	OPTIONAL COMMENT FOR MODERATOR
<a href="#">The Solution of Heterotic String Theory Compactified on C^4 as an Unstable Analytic Continuation of Type IIB Strings Surrounded by a Surface Defect (Excluding Sheaf Cohomology)</a> 10:30 - 11:00	<a href="#">[view]</a>	<input checked="" type="radio"/> Yes <input type="radio"/> No	Note for moderator: <input style="width: 100%;" type="text" value="Test, Test, Test 123"/>

## Disclosure Review

If configured, this is the screen the host or session owner will see when reviewing the disclosures. They will review the data for a specific activity to ensure there will not be conflicts of interest with any presentation. Select **Disclosures Review** from the **Messages** drop-down.

### Disclosure Review

**Session Title:** [General Duality \(Excluding a Certain Notion of Anomaly Matching\) Obtained From Divisors](#)  
**Session Type:** Educational Course  
**Day:** 06-19-2017  
**Times:** 10:30 - 11:30  
**Location:** Greenbrier Ballroom B (Greenbrier Hotel)  
**Session Moderators:** Toby Flenderson, Tom Haverford

**PRESENTER**

SPEAKER NAME	DISCLOSURE	ABSTRACT TITLE / TIMES	CONFLICT OF INTEREST	REVIEW
April Ludgate <a href="#">[contact person]</a>	<a href="#">[view]</a>	<a href="#">The Solution of Heterotic String Theory Compactified on C^4 as an Unstable Analytic Continuation of Type IIB Strings Surrounded by a Surface Defect (Excluding Sheaf Cohomology)</a> 10:30 - 11:00	<input checked="" type="radio"/> Yes <a href="#">[view disclosure comment]</a> <input type="radio"/> No	<input type="text" value="Select ..."/> <a href="#">[view history/add comments]</a>
Sandra Lantz <a href="#">[contact person]</a>	<a href="#">[view]</a>	<a href="#">The Inflationary Compactification of Quantum Mechanics and Trivial Vortices</a> 11:00 - 11:30	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="Select ..."/> <a href="#">[view history/add comments]</a>

## ACCESSING THE ADMIN CENTER

Based on your role permissions, you will see the centres you have available to you. If you have more than one role on any of the centres you will use the dropdown to select the role you want to use. Click on the **Admin** link to access the **Admin Centre**.

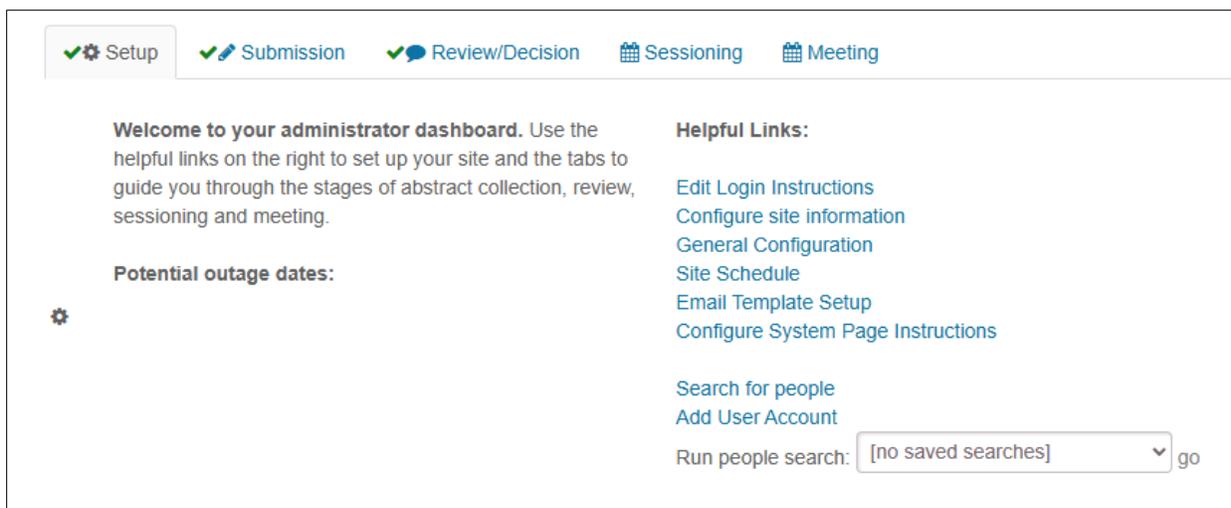


## LOGGING OUT

You can log out at any time by clicking **Log Out** on the top right corner of the page.

## DASHBOARD

The **Admin Dashboard** is designed to provide you with an at-a-glance insight into the meeting cycle. To access the **Dashboard**, log into your ScholarOne Conferences site and click on the **Admin** tab at the top of the screen. This will take you to the **Admin Dashboard**. The dashboard provides quick access for drilling down to specific data, identifies outstanding tasks, and streamlines the resolution of these tasks.



The screenshot shows the Admin Dashboard interface. At the top, there is a navigation bar with tabs: Setup (checked), Submission, Review/Decision, Sessioning, and Meeting. Below the navigation bar, the main content area is divided into two columns. The left column contains a welcome message: "Welcome to your administrator dashboard. Use the helpful links on the right to set up your site and the tabs to guide you through the stages of abstract collection, review, sessioning and meeting." Below this is a section titled "Potential outage dates:" with a gear icon. The right column contains a "Helpful Links:" section with a list of links: Edit Login Instructions, Configure site information, General Configuration, Site Schedule, Email Template Setup, and Configure System Page Instructions. Below the links is a "Search for people" section with "Add User Account" and a search box labeled "Run people search:" containing "[no saved searches]" and a "go" button.

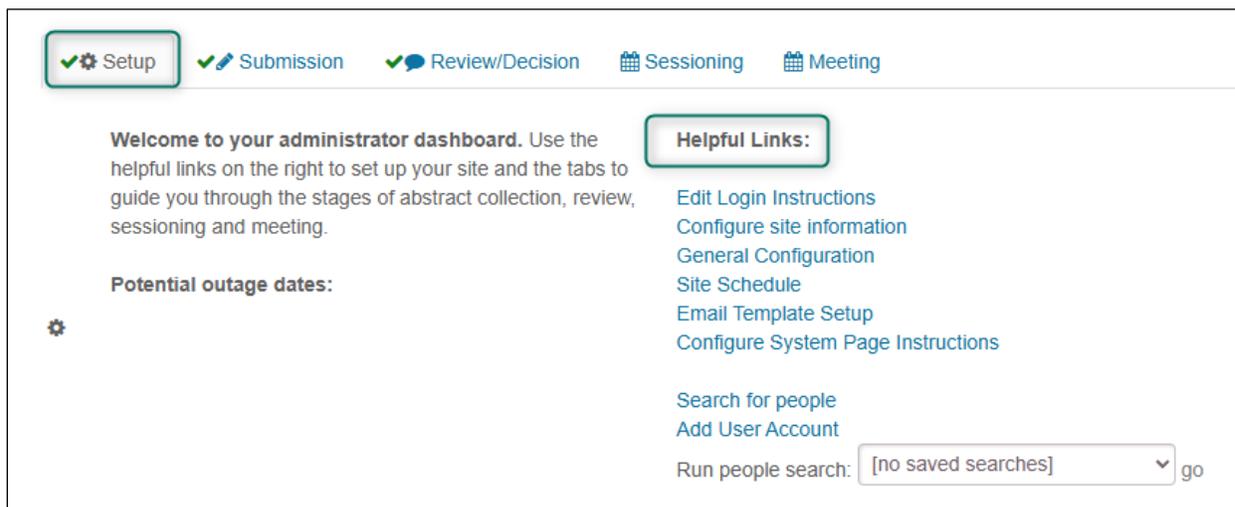
In conjunction with your Client Implementation Manager, you can configure the **Dashboard** for your specific needs. There are five dashboards that can be configured: Setup,

Submission, Review/Decision, Sessioning, and Meeting. In addition to the separate tabs, you can configure the **Helpful Links** which appear to the right of the tab contents.

A green checkmark will appear beside each tab once that part of the meeting cycle is complete. Completion is based on the site's workflow schedule.

## SETUP

Under **Setup**, you will find a welcome message and the configurable **Helpful Links**. Below is an example of some of the **Helpful Links** that are applicable to **Setup**. The options also include links to saved searches and a customizable link to a site such as your society website.



The screenshot shows the administrator dashboard with five tabs: Setup (active), Submission, Review/Decision, Sessioning, and Meeting. The Setup tab contains a welcome message, a 'Potential outage dates' section with a gear icon, and a 'Helpful Links' section. The Helpful Links section includes: Edit Login Instructions, Configure site information, General Configuration, Site Schedule, Email Template Setup, Configure System Page Instructions, Search for people, Add User Account, and a search box with the text 'Run people search: [no saved searches] go'.

## SUBMISSION

The **Submission Dashboard** tab includes the submission dates for your various submission roles. Again, example **Helpful Links** that are applicable to the **Submission** tab are displayed in the image below. All links are configurable so that you can add the links that are most useful to your site.

Included in all **Helpful Links** for the Submission dashboard are the Statistics Report, Date Submitted Report and the Incomplete Submitted Abstracts Report.

The **Statistics Report** includes such information as Submission Status for all submitted and all draft abstracts, decision statistics, countries of submissions, abstract category totals, and presentation types. You can export the Statistics Report.

The **Date Submitted Report** contains a summary of how many abstracts were received during the submission period by day.

The **Incomplete Submitted Abstract Report** includes abstracts which were successfully submitted but now may have incomplete information due to Admin changes through proxy.

 Setup	 Submission	 Review/Decision	 Sessioning	 Meeting
<b>Submission Period (Closed)</b> 		<b>Helpful Links:</b>		
Jan 15 2018 - Mar 26 2018 - [PRES] Presidential Events 15 Draft, 32 Submitted, 1 Author Withdrawn		Run abstract search: <input type="text" value="Abstract Disposition Report"/> go		
Jan 15 2018 - Apr 09 2018 - [MPPG] Multidisciplinary Program Planning Group 400 Draft, 136 Submitted, 10 Withdrawn, 2 Author Withdrawn		<a href="#">Search for abstracts</a> <a href="#">List draft abstracts which appear complete</a> <a href="#">List draft abstracts</a>		
Jan 15 2018 - Jan 15 2018 - [AEI] Academic Employment Initiative INACTIVE 0 Draft, 0 Submitted		Run people search: <input type="text" value="[no saved searches]"/> go <a href="#">Search for people</a> <a href="#">Add User Account</a> <a href="#">List people missing disclosures</a>		
Jan 15 2018 - Mar 22 2018 - [AGFD] Division of Agricultural and Food Chemistry 64 Draft, 328 Submitted, 28 Withdrawn, 1 Author Withdrawn		<a href="#">Statistics Report</a> <a href="#">Date Submitted Report</a> <a href="#">Incomplete Submitted Abstracts</a>		

## REVIEW / DECISION

The Review/Decision Dashboard tab includes the dates of review and chair roles and gives summary statistics. Recommended **Helpful Links** are in the image below. You may also download the Score Report from this dashboard tab.

⚙️ Setup
✓✎ Submission
✓🗨 Review/Decision
📅 Sessioning
📅 Meeting

**Review/Decision Period (Closed)** [↻](#)

Jul 01 2014 - May 05 2023 - Review Center [\[my reviews\]](#) [\[make decisions\]](#)  
 4 assigned  
 3 accepted/sessioned, 1 rejected

Jul 01 2014 - May 05 2023 - Review Center Admin [\[assign\]](#) [\[make decisions\]](#)  
 4 assigned  
 3 accepted/sessioned, 1 rejected

🗨

Apr 05 2024 - Apr 05 2024 - Review 2 [\[my reviews\]](#)  
 0 assigned  
 0 accepted/sessioned, 0 rejected

**Exchange Bin:**  
 0 abstracts in bin  
 Aug 23 2024 - Aug 24 2025 - Review Center - [\[view bin\]](#)  
 Aug 23 2024 - Aug 24 2025 - Review Center Admin - [\[view bin\]](#)

Download Score Report

**Helpful Links:**

[Assign reviewers](#)

Run abstract search:  
 [go](#)

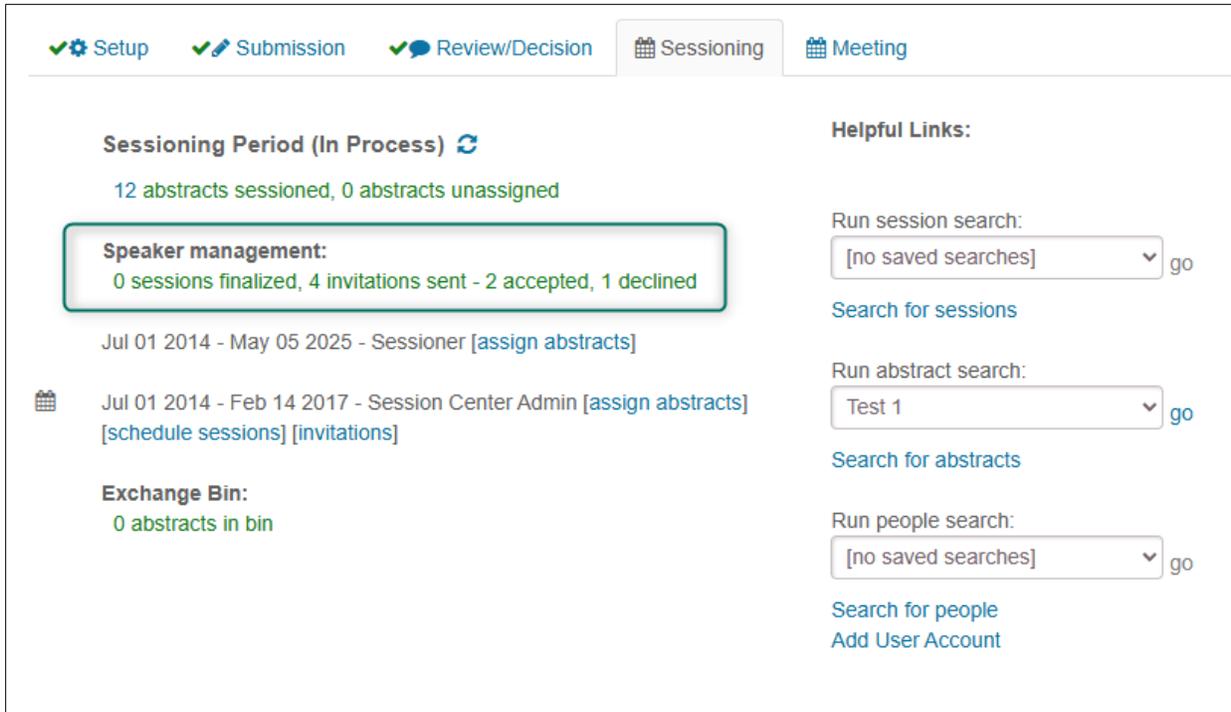
[Search for abstracts](#)  
[List draft abstracts](#)

Run people search:  
 [go](#)

[Search for people](#)  
[Add User Account](#)

## SESSIONING

The **Sessioning Dashboard** provides statistics and applicable dates of the Sessioning roles. It also includes information regarding Speaker Management if this is configured for your site. The **Helpful Links** may include standard reports such as an Abstract Status Report and other saved reports.



The screenshot shows the Sessioning Dashboard with a navigation bar containing Setup, Submission, Review/Decision, Sessioning (active), and Meeting. The main content area is divided into two columns. The left column features a 'Sessioning Period (In Process)' section with a refresh icon, indicating '12 abstracts sessioned, 0 abstracts unassigned'. Below this is a 'Speaker management' box (highlighted with a green border) showing '0 sessions finalized, 4 invitations sent - 2 accepted, 1 declined'. Two sessioning periods are listed: 'Jul 01 2014 - May 05 2025 - Sessioner [assign abstracts]' and 'Jul 01 2014 - Feb 14 2017 - Session Center Admin [assign abstracts] [schedule sessions] [invitations]'. An 'Exchange Bin' section shows '0 abstracts in bin'. The right column is titled 'Helpful Links:' and contains three search sections: 'Run session search:' with a dropdown menu showing '[no saved searches]' and a 'go' button; 'Search for sessions'; 'Run abstract search:' with a dropdown menu showing 'Test 1' and a 'go' button; 'Search for abstracts'; 'Run people search:' with a dropdown menu showing '[no saved searches]' and a 'go' button; 'Search for people'; and 'Add User Account'.

## MEETING

The Meeting Dashboard displays information on the Itinerary Planner if it is configured for your site. A useful Helpful Link is the link to the **Data Export Tool**.

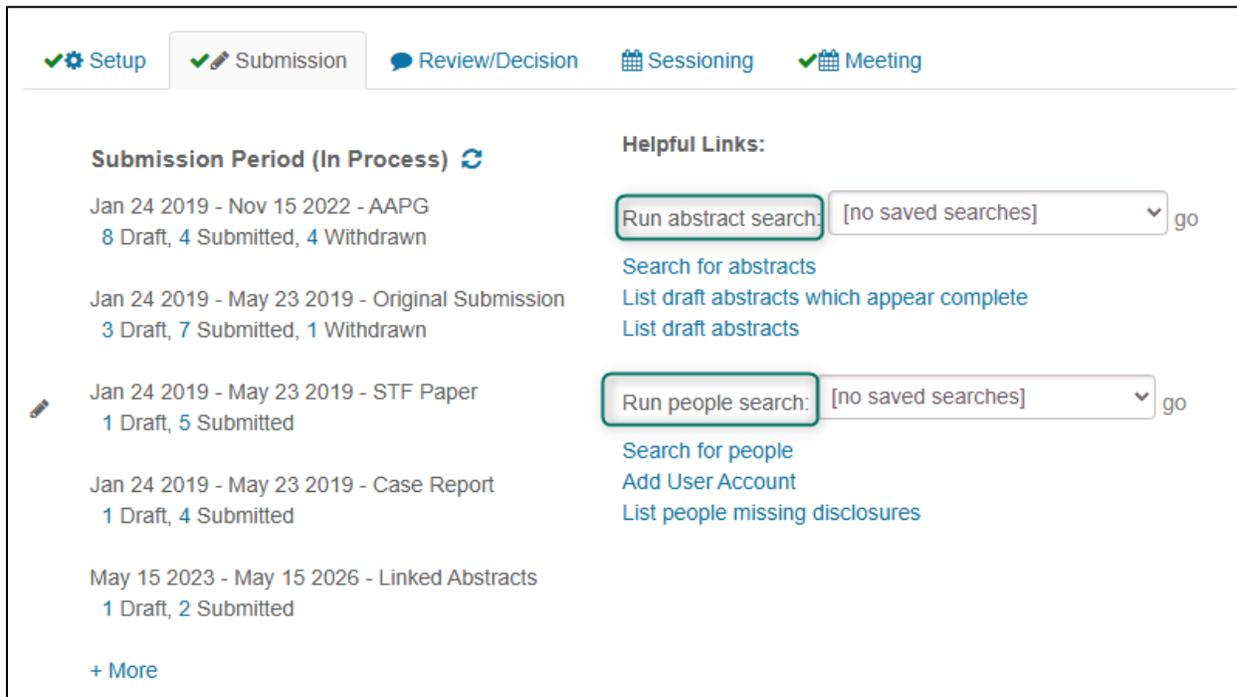


The screenshot shows the Meeting Dashboard with a navigation bar containing Setup, Submission, Review/Decision, Sessioning, and Meeting (active). The main content area features an 'Itinerary Planner Period (Closed)' section with the dates 'Mar 30 2020 - Apr 01 2025 - Itinerary Planner' and links for '[view itinerary planner]' and 'Data export'. A 'Helpful Links:' button is also visible.

## SEARCH

**Search** combines standard and customized searches across three data sets: Abstracts, Sessions, and People. This combined approach maximizes consistency of reporting and provides you with a one stop reporting tool.

Saved searches can be added as **Helpful Links** to any **Dashboard**.



The screenshot shows a dashboard with a navigation bar at the top containing: Setup (checked), Submission (checked), Review/Decision, Sessioning, and Meeting (checked). Below the navigation bar, there are two main sections:

- Submission Period (In Process) [↻](#)**
  - Jan 24 2019 - Nov 15 2022 - AAPG  
8 Draft, 4 Submitted, 4 Withdrawn
  - Jan 24 2019 - May 23 2019 - Original Submission  
3 Draft, 7 Submitted, 1 Withdrawn
  -  Jan 24 2019 - May 23 2019 - STF Paper  
1 Draft, 5 Submitted
  - Jan 24 2019 - May 23 2019 - Case Report  
1 Draft, 4 Submitted
  - May 15 2023 - May 15 2026 - Linked Abstracts  
1 Draft, 2 Submitted
  - [+ More](#)
- Helpful Links:**
  - Run abstract search:** [no saved searches] [▼](#) [go](#)
    - [Search for abstracts](#)
    - [List draft abstracts which appear complete](#)
    - [List draft abstracts](#)
  - Run people search:** [no saved searches] [▼](#) [go](#)
    - [Search for people](#)
    - [Add User Account](#)
    - [List people missing disclosures](#)

Some features are common across all three search options. These include saved searches, results format, search criteria, display items and sort criteria.

**Saved Searches** ⓘ Edit

Select... ▼

**Special Searches** ⓘ Edit

Select... ▼

---

**Select Format** ⓘ Edit

Basic / Inline ▼

---

**Select Search Criteria** ⓘ Edit

+ Add

+ Show Full List

**Select Display Items** ⓘ Edit

+ Add

+ Show Full List

**(RE-ORDER)**

1 ▼	CONTROL ID
2 ▼	TITLE
3 ▼	SUBMITTER (NAME ONLY)
4 ▼	ABSTRACT STATUS

---

**Select Sort Criteria**

**Primary**

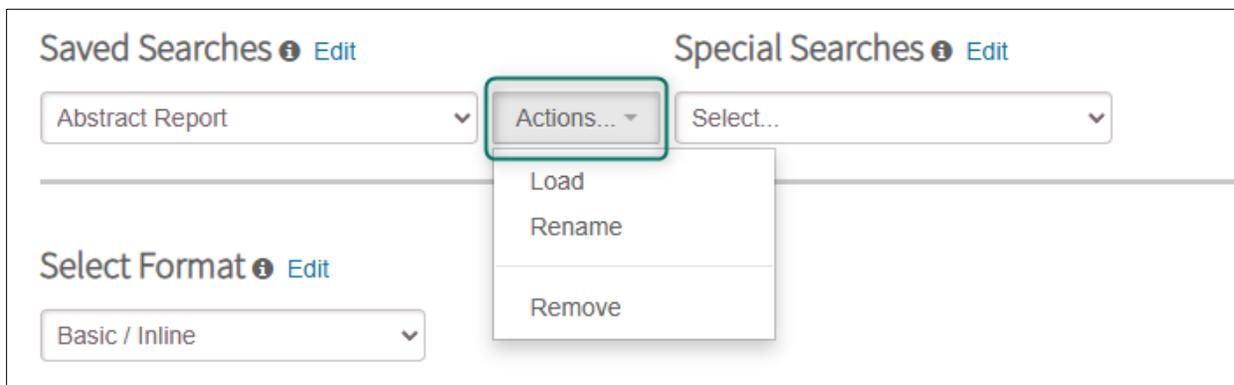
Select... ▼

## SAVED SEARCHES

Each type of search also includes a dropdown for **Saved Searches**. To save a search, scroll to the bottom of the search, give your search and name, and then click Save Search.

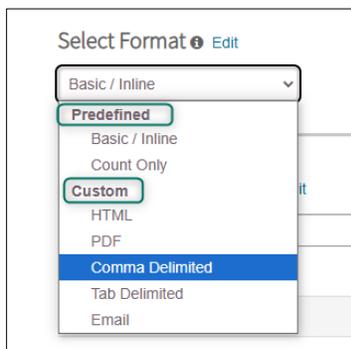


The search will be available when configured on any of the **Dashboards**. When you select the **Saved Searches**, you can load the search, rename the search, or delete it by clicking on the **Actions** dropdown.



## RESULTS FORMAT

There are two sets of results formats: Predefined Formats and Custom Formats.



## Predefined Formats

- **Basic/Inline:** this is a quick option which returns your search criteria with set display items. These set display items are ID, Title, Contact Name and Status (for Abstracts and Sessions) and Name, Institution, Email and Role (for People). Using this format allows you to proxy as that user. Results for a Basic/Inline search appear at the bottom of the search options.
- **Count Only:** the number of results that meet your criteria. This returns a number only.

## Custom Formats

The options allow for more customized result output styles.

- **HTML:** display item results will display on an HTML page within the site. For example, from an Abstracts based search you can view the contact author's profile, proxy in as the contact author, and edit the abstract if you have the default display items in the HTML results.
- **PDF:** each result will appear on a single page of a PDF document with the display items you have selected to appear.
- **Comma Delimited:** display results in a comma delimited .csv file which can be opened in Excel.
- **Tab Delimited:** display results in a tab delimited .txt file which can be opened in Excel.
- **Email:** used to send custom emails based on your specific search criteria.

## SEARCH CRITERIA

Each search type has a listing of **Search Criteria**. Using the **Show Full List** link and the pre-populated **Standard Search Criteria** section, you can refine your search selections so that your report will be based on your specific criteria. You may also use a "type ahead" to populate the report's search criteria. The **Standard Search Criteria** are suggested criteria and may be removed if not applicable to your search.

**Note:** For the type-specific criteria to show in the full and in the standard criteria, you must first select the correct type of search: abstract, session or people. This is the most important step in creating a report.

Select Search Criteria [Edit](#)

+ Add

+ Show Full List

---

**SEARCH CRITERIA**

**Standard Search Criteria**

Control ID	<input type="text"/>	<a href="#">Remove</a>
Final ID	<input type="text"/>	<a href="#">Remove</a>
Abstract Title	<input type="text"/>	<a href="#">Remove</a>
Submitter First Name	<input type="text"/>	<a href="#">Remove</a>
Submitter Last Name	<input type="text"/>	<a href="#">Remove</a>
Submission Role	<input type="text" value="Abstract Submissions"/> <input type="text" value="Invited Speaker Submissions"/> <input type="text" value="Video Submissions"/> <input type="text" value="Oral or Poster Submissions"/>	<a href="#">Remove</a>
Abstract Status	<input type="text" value="Draft"/> <input type="text" value="Returned to Draft"/> <input type="text" value="Submitted"/> <input type="text" value="Resubmitted"/>	<a href="#">Remove</a>

**Note:** Use the **Session Status** search criteria to ensure only Session Proposals are returned in Session Proposal types of searches. The **Session Search** includes all sessions in the **Session Center**. Sessions created directly in the **Session Center** will have a session status equal to Admin Created. To perform a search that will only return session proposals, you will need to exclude sessions with a Session status equal to Admin Created.

## DISPLAY ITEMS

To set your output data, use the Display Items fields to designate what information you want to display. The display items are search-specific lists and may be reordered. Use the Show Full List option to view all available display items. The Display Items are used for the custom search formats.

### Select Display Items ⓘ Edit

+ Add  
+ Show Full List  
(RE-ORDER)

1	CONTROL ID
2	TITLE
3	SUBMITTER (NAME ONLY)
4	ABSTRACT STATUS

## SORT ORDER

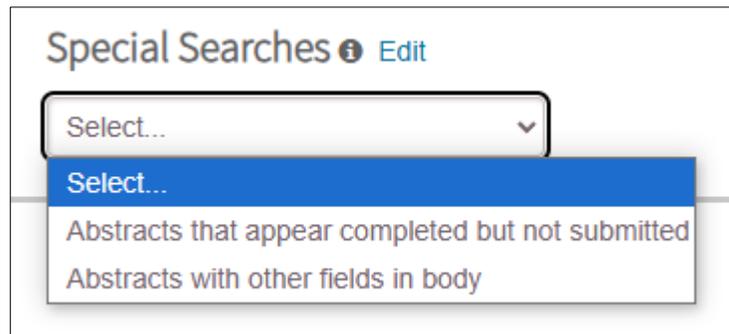
In addition to designating your search criteria, you will also want to use the **Select Sort Criteria** dropdown to specify the order of the search results. For Abstract and Session searches, primary and secondary sorts are available.

### Select Sort Criteria ⓘ Edit

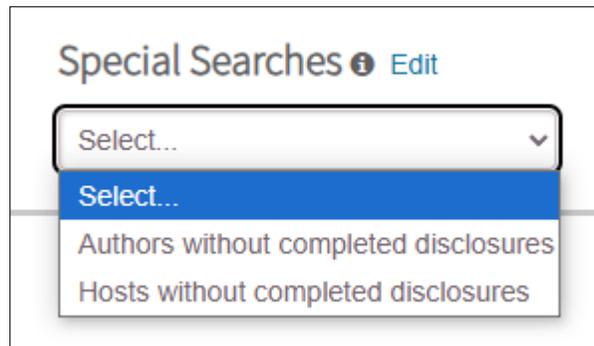
<b>Primary</b>	<b>Secondary</b>
Abstract Title	Control ID

## SEARCH TYPE-SPECIFIC OPTIONS: SPECIAL SEARCHES

**Abstract Special Searches** include the search for abstracts that appear completed but are not yet submitted. This gives you information on draft submissions and you may email authors right from the search using the **Email** format.



People Special Searches includes two pre-formatted reports. The **Authors without Completed Disclosures** report allows you to query the system for missing disclosures. You also can send emails to those authors straight from the search by using the **Email** format. There is second special report called **Hosts Without Completed Disclosures**. You may email the hosts using the same procedure as emailing the authors.



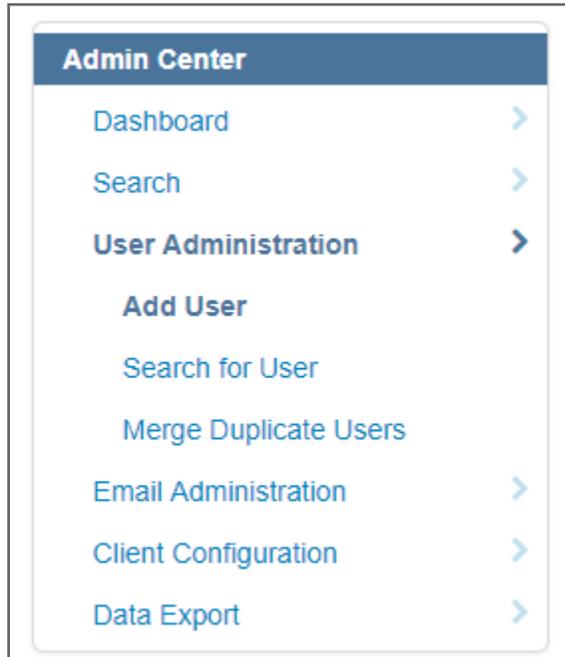
---

**Note:** Special searches can be modified but will then need to be saved as a Saved Search to retain them for future use.

---

## USER ADMINISTRATION

The **User Administration** section of the **Admin Center** allows you to add users, search for users, and merge users.



### ADD USER

The **Add User** process mirrors the **Account Create** function of the site. The common sections are Name and Professional Information, Contact Information (including optional Twitter and LinkedIn profiles), Access (role selection), Disclosure (conflict of interest), and User ID setup. It should be noted that passwords are encrypted and not visible to any user.



As an admin, you can create an account with just the first name, last name, and email address. You will also designate the roles a user should have. The last step is to create a User ID for the new account (this must be a unique id and not one already in use in your site data).

Submission and Proposal roles can be configured to automatically be given to a user at account creation. Once the account is created, the Account Creation email is sent to the user. In the email, there is a link to update their password. This email will be a pop-up email and may be edited as necessary before sending. The email template is in **Admin> Email Administration> System Emails> Account Creation**.

### Account Creation

[Variable Tags](#)

Name:

To:

From:

Cc:

Bcc:

Subject:

Body:

```
##date_today##

Dear ##user_salutation## ##user_firstname## ##user_lastname##,

Your account has been successfully created. You are responsible for continuing to keep your contact information up-to-date.
You can update your contact information on-line by clicking on your name at the top of each screen. In the future, you will need to log in
using your user ID and password.

Your User ID is: ##userid##
Your Password is: ##person_forgot_password_link##

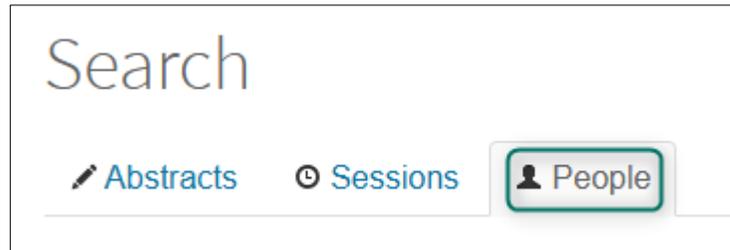
If you have any questions, please contact the support team.

Sincerely,

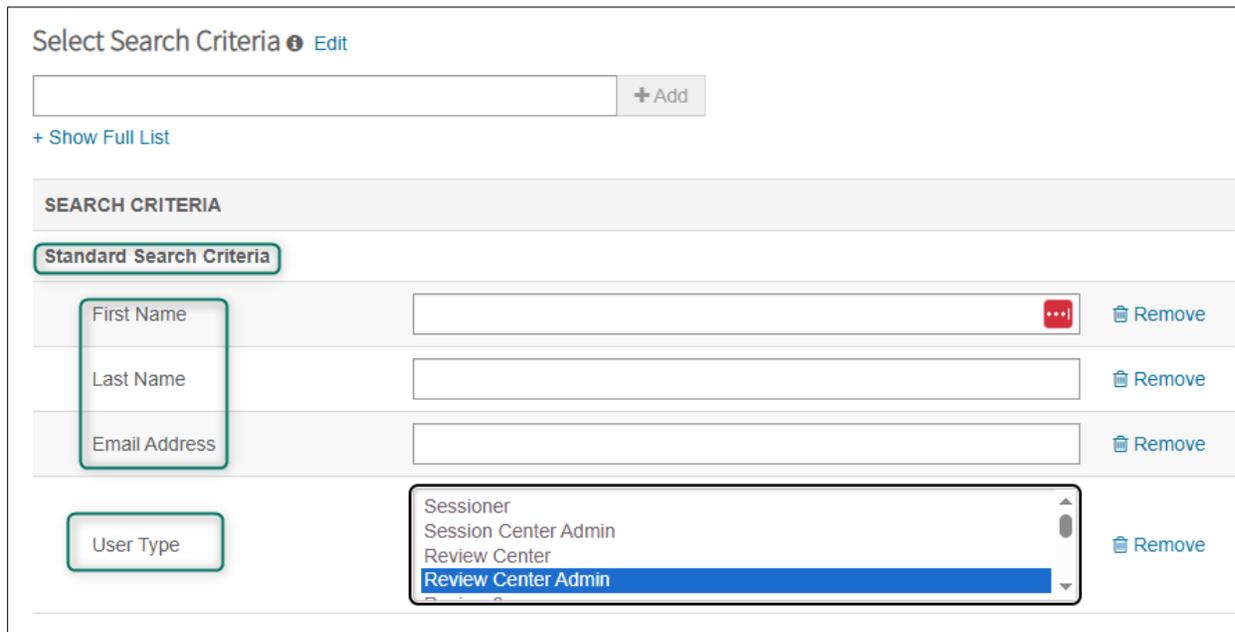
##site_contact_name##
##site_contact_email_address##
```

## SEARCH FOR USER

By clicking **Search for User** under **User Administration**, you are taken to the **People Search** tab in the **Search** section. Here you may search for a user or user type. See the **SEARCH** section of the guide for details on how to use the search functionality.



When running a People search, you can use the standard search criteria to query your site's data. Common searches are by contact information (first name, last name, email address) or by User Type. Individual results display below the Sort Criteria.

A screenshot of the "Select Search Criteria" interface. At the top, it says "Select Search Criteria" with an "Edit" link. Below this is a search input field with a "+ Add" button. A "+ Show Full List" link is also present. The main section is titled "SEARCH CRITERIA" and contains a "Standard Search Criteria" tab. Under this tab, there are four search criteria: "First Name", "Last Name", "Email Address", and "User Type". Each criterion has an input field and a "Remove" button. The "User Type" dropdown menu is open, showing options: "Sessioner", "Session Center Admin", "Review Center", and "Review Center Admin" (which is highlighted in blue).

The search results are below.

Person Search Results (1 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
<a href="#">Author, Amelia</a>  <a href="#">Proxy</a>  <a href="#">Edit</a> (Last in: Never)		<a href="mailto:amelia@test.com">amelia@test.com</a>	Review 2, Invited Speaker Submissions, Review Center, Review Center Admin, Abstract Submissions <a href="#">+ More</a>

## Name

Click on the User's **name** in the search results to view profile information. Using this option, you can perform several tasks on the account. There are several sections to the search result as detailed below.

### *Person Information*

### Early/Late Access

To give a user early/late access to a role, click on **Early/Late Access** next to the role you want to individually adjust access dates.

Person Information	
Person Information	
Person ID	8424839
User ID	amelia@test.com
Name	Amelia Author
Department	
Institution	
User Permissions	Sessioner <a href="#">(Early/Late Access)</a> Session Center Admin <a href="#">(Early/Late Access)</a> Review Center <a href="#">(Early/Late Access)</a> Review Center Admin <a href="#">(Early/Late Access)</a>

On the pop-up, enter the appropriate dates for access and mark the early and/or late dates as active



### Account Info

If necessary, you can send a user their **Account Info** and/or generate a temporary password. The template for this email is in **Admin>Email Administration>System Email>Send Account Information**. Generate a temporary password which will allow the user quick access to the account where they can then update their password.

Person Information	
Country / Region	
Phone	
Fax	
Email	amelia@test.com
Send Account Information Email	<a href="#">Send Account Info</a>
Temporary Password	N/A
Generate Password	<a href="#">Generate</a>

This section displays the user's answers to custom questions on the account, if configured.

Person Information	
Temporary Password	N/A
Generate Password	<a href="#">Generate</a>
Person Details	
Prior Attendance at Annual Meetings	<input checked="" type="checkbox"/> Yes
Short Bio	

### *Account Creation Information*

This section is for reference only.

Account Creation Information	
Creation Date/Time	10/13/2015 2:19 PM EDT
Created By	Meetings Support (43903)
Site Short Name	training
IP Address	10.214.19.5

## Proxy

Click on **Proxy** to view the site the way the user does. This is helpful for resolving issues and answering questions from the user.

Person Search Results (1 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
<b>Author, Amelia</b>  Proxy  Edit (Last in: Never)		amelia@test.com	Review 2, Invited Speaker Submissions, Review Center, Review Center Admin, Abstract Submissions <a href="#">+ More</a>

## Edit

From the Search results, you can edit a user's account by clicking **Edit**. This will take you into the account information beginning with General Information. You can edit information such as email address, User ID or Roles.

---

**Note:** The system does not allow admins to remove roles from accounts if those roles are linked to abstract assignments for reviewers, chairs, or sessioners.

---

Person Search Results (1 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
<b>Author, Amelia</b>  Proxy  Edit (Last in: Never)		amelia@test.com	Review 2, Invited Speaker Submissions, Review Center, Review Center Admin, Abstract Submissions <a href="#">+ More</a>

## Institution (Department)

Institution (Department) is listed for reference.

Person Search Results (1 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
<b>Author, Amelia</b>  <a href="#">Proxy</a> <a href="#">Edit</a> (Last in: Never)	Silverchair	<a href="mailto:amelia@test.com">amelia@test.com</a>	Review 2, Invited Speaker Submissions, Review Center, Review Center Admin, Abstract Submissions <a href="#">+ More</a>

## Email

Email the user from the results by clicking on their email address. This will use the site's hyperlink email which pre-populates the To: and From: fields, as well as the Subject line and Body fields as configured. The email is located at Admin>Email Administration>System Emails>Hyperlink Email (Person).

Person Search Results (1 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
<b>Author, Amelia</b>  <a href="#">Proxy</a> <a href="#">Edit</a> (Last in: Never)	Silverchair	<a href="mailto:amelia@test.com">amelia@test.com</a>	Review 2, Invited Speaker Submissions, Review Center, Review Center Admin, Abstract Submissions <a href="#">+ More</a>

## Role

The user's current roles are listed in the far-right column for reference. This column can be viewed to verify proper roles on an account. Click **More** to view all roles on the account.

Roles cannot be removed if the user is associated with a reviewer or sessioner task.

Person Search Results (1 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
<b>Author, Amelia</b>  <a href="#">Proxy</a> <a href="#">Edit</a> (Last in: Never)	Silverchair	amelia@test.com	Review 2, Invited Speaker Submissions, Review Center, Review Center Admin, Abstract Submissions <a href="#">+ More</a>

## MERGE DUPLICATE USERS

Many times, instead of using the **Forgot Password** feature, users will create a second account. It then becomes necessary to merge their accounts so that abstracts and account information is all on one account.

### Key Points:

- Once a merge takes place it cannot be undone.
- When selecting users to merge, all selected accounts will be merged into one account. For that reason, only merge accounts for one user at a time.

Using the various search options, you can easily find duplicate accounts.

---

**Note:** You can use wildcard searches if full information is not known. Use the \* (asterisk) placed at the end of the search name or word to denote a wildcard.

---

Search for users with inverted first and last names (Thomas Rose and Rose Thomas)  
 Search for users with the same last name and first initial  
 Search for users with the same first and last name  
 Search for users with the same email address  
 Search for users with the same member ID  
 Perform the search below (use wildcards (\*) where necessary)

First/Given Name   
 Last/Family Name

Member ID   
 E-mail

**Person Search Results (2 Records Found)** [Export List to CSV](#)

NAME	USER ID / EMAIL	INSTITUTION	ROLES	MARK FOR MERGE	PRIMARY ACCOUNT
<b>Author, Amelia</b> <a href="#">More Info</a> <a href="#">Proxy</a>	amelia@test.com / amelia@test.com	Silverchair	Sessioner, Session Center Admin, Review Center, Review Center Admin, Review 2 <a href="#">+ More</a>	<input type="checkbox"/>	<input type="radio"/>
Last in: Never					
<b>Author, Amy</b> <a href="#">More Info</a> <a href="#">Proxy</a>	amy123@test.com / amy123@test.com	N/A	Abstract Submissions, Invited Speaker Submissions, Video Submissions	<input type="checkbox"/>	<input type="radio"/>
Last in: Never					

In the results, you can click to view full account information or proxy in as the user. Once you have determined the two accounts should be merged, you would select **Mark for Merge** for each account to merge and select the **Primary Account**. End the process by clicking **Merge Users** at the bottom of the screen.

Person Search Results (2 Records Found) [Export List to CSV](#)

NAME	USER ID / EMAIL	INSTITUTION	ROLES	MARK FOR MERGE	PRIMARY ACCOUNT
<b>Author, Amelia</b> <a href="#">More Info</a> <a href="#">Proxy</a> Last in: Never	amelia@test.com / amelia@test.com	Silverchair	Sessioner, Session Center Admin, Review Center, Review Center Admin, Review 2 <a href="#">+ More</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Author, Amy</b> <a href="#">More Info</a> <a href="#">Proxy</a> Last in: Never	amy123@test.com / amy123@test.com	N/A	Abstract Submissions, Invited Speaker Submissions, Video Submissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Merge Users >](#)

All account fields are merged into the primary account. This includes any abstracts, roles and review/session assignments.

## LOCKED ACCOUNTS

If a user has made multiple unsuccessful sign-on attempts, their account will be locked. You can unlock an account by unchecking the **Account Locked** box on the General Information page of their account information.

Member ID

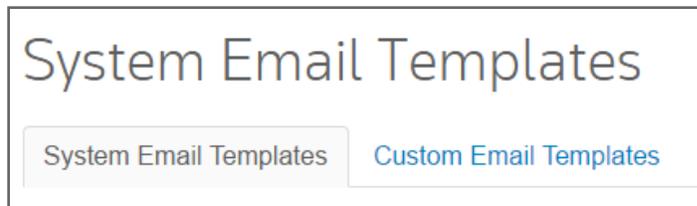
Account Locked

## ADMIN SUPER USER

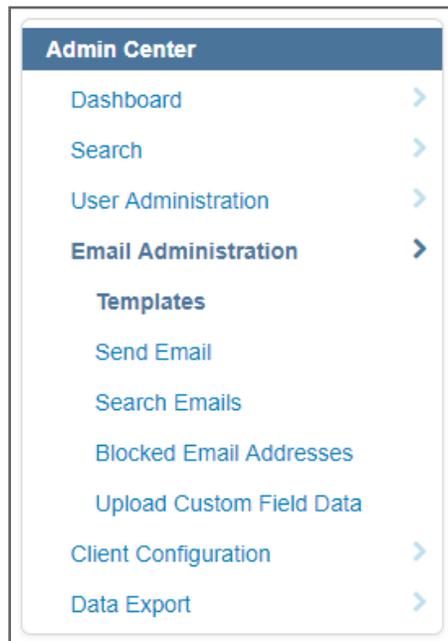
A Configuration Permission exists for a “Super User” Administrator Role. Super User Permission allows a site with multiple levels of admin roles to limit which roles the lower-level admin can grant when editing a user account. This will allow sites to prevent those admins from granting access to roles that are higher than their own. The configuration setting must be completed by the Client Implementation Manager to grant the Super User role.

## EMAIL ADMINISTRATION

Under Email Administration you will find both system emails (those that are triggered by events such as submission or return to draft) and custom emails (emails you send to specific groups of users).



There are five sections under Email Administration: Templates, Send Email, Search for Emails, Blocked Email Addresses, and Upload Custom Field Data.



## TEMPLATES

**System Email** and **Custom Email** templates are available for customization. Both types of emails have multiple tags to use. The tags are available via a link called **Site Tags** on the top right corner of each template. The list opens in a separate window allowing you to cut and paste tags. The tags can then be placed directly in the email.

Abstract Submitted

✍ Site Tags

Name:  ⋮

To:

From:

Cc:

Bcc:

Subject:

System emails can be turned on or off and some can be designated to be edited before sending. You will work with your Client Implementation Manager to assure that the proper system emails are selected. Simply click in the **Activate** column to use the system template.

NAME	STATUS	ACTIVATE	EDIT BEFORE SENDING (ADMINS ONLY)	VIEW SENT
Abstract placed in Exchange Bin	Inactive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Q"/>
Abstract Re-assigned from Review Exchange Bin	Active	<input checked="" type="checkbox"/>		<input type="button" value="Q"/>
Abstract Re-assigned from Session Exchange Bin	Active	<input checked="" type="checkbox"/>		<input type="button" value="Q"/>
Abstract Returned to Draft	Active	<input checked="" type="checkbox"/>		<input type="button" value="Q"/>
Abstract Stub Submitted	Inactive	<input type="checkbox"/>		<input type="button" value="Q"/>
Abstract Submitted	Active	<input checked="" type="checkbox"/>		<input type="button" value="Q"/>
Abstract Withdrawn	Active	<input checked="" type="checkbox"/>		<input type="button" value="Q"/>
Account Creation *	Always active		<input type="checkbox"/>	<input type="button" value="Q"/>
Account Modification	Active	<input checked="" type="checkbox"/>		<input type="button" value="Q"/>
Account Removed by User Request *	Always active			<input type="button" value="Q"/>

Custom email templates are created by you. These emails are targeted to specific sets of users and are sent out individually or in batches. When you select the **Custom Emails** tab, you will give your template a title and then click **Add** at the bottom of the screen.

Template Name:

The Site Tag list is available to make your email pull in individual data. Tags that are in all capital letters are the **Variable Tags** you create in **Configuration Settings**. The full list of tags is available at the top right of the template as a reference.

Site Tags	
<a href="#">Edit</a>	
##DEADLINE_DATE##	Deadline Date
##HOTEL##	Hotel
##LOCATION##	Location
##NOTIFICATION##	Notification
##REVIEW_DEADLINE##	Review Deadline
##SITE_URL##	Site URL

Templates can be previewed so that you may assure that the tags are pulling in the appropriate data. The preview button is located at the bottom left corner of the template.

---

**Note:** Using the **View Sent** column to the right of the template list, you can view all emails sent using that template.

---

## Copy Function for Custom Emails

New custom emails can be created from existing custom emails. This helps you create similar emails and then make minor changes to the new email template. There are two fields to create the copy: a field for naming the new template and a second for specifying which template the new email should be copied from.

## Custom Email Templates

[System Email Templates](#) | **Custom Email Templates**

- To **Add** a new custom email template, type a name into the box at the bottom of the page and click **+Add**.
- To **Edit** a template click the hyperlinked email name.

[Edit](#)  
 Template Name:

NAME	MODIFIED DATE	VIEW SENT	DELETE
<a href="#">Accept</a>		<input type="button" value="Q"/>	<input type="button" value="🗑"/>
<a href="#">Invite</a>	09-25-2023 06:29:20	<input type="button" value="Q"/>	<input type="button" value="🗑"/>
<a href="#">Reject</a>		<input type="button" value="Q"/>	<input type="button" value="🗑"/>
<a href="#">Reviewer Notification</a>		<input type="button" value="Q"/>	<input type="button" value="🗑"/>

## Email Attachments

Admins can attach files to system emails, custom emails, and speaker management emails. It is possible to remove an attachment when using the “**Edit Before Sending Email**”. Attachment must be 6 megabytes or less in size.

### Attachments

Select Attachment

Allowed file types - doc; docx; xls; xlsx; ppt; pptx; pdf. Maximum file size - 6 megabytes.

Selected Attachment(s)

ATTACHMENT	REMOVE
<a href="#">S1A Admin Pre-Live Checklist.pdf</a>	<input type="button" value="🗑 Remove"/>

## SEND EMAIL

Click **Send Email** under **Email Administration** to begin the process of sending your custom email. When you click **Send Email**, you will be given three choices for sending out the custom emails: by abstract, by session, or by people. Selecting one of these options will then take you to the **Search** functionality.

### Send Email

In order to send email, please click one of the links below which will take you to the relevant search page where you can select your criteria and email template to send the email(s) out.

[✎ Edit](#)

[Send Emails by Abstract](#)

[Send Emails by Session](#)

[Send Emails by Person](#)

## Abstract-based Emails

Select the Abstract format to begin. Using the Abstract selection, you can create your targeted set of data using the **Standard Search Criteria** and other select criteria. Select the **Email Format** to begin. The Abstract Search is abstract-based data. A typical **Abstract Custom Email** would be to search for all abstracts in a specific category (add Current Category from Select Search Criteria).

**SEARCH CRITERIA**

**Standard Search Criteria**

Control ID	<input type="text"/>	<a href="#">Remove</a>
Submission Role	<input type="text" value="Abstract Submissions"/> <input type="text" value="Invited Speaker Submissions"/> <input type="text" value="Video Submissions"/> <input type="text" value="Oral or Poster Submissions"/>	<a href="#">Remove</a>
Abstract Status	<input type="text" value="Draft"/> <input type="text" value="Returned to Draft"/> <input type="text" value="Submitted"/> <input type="text" value="Resubmitted"/>	<a href="#">Remove</a>
<b>Current Category</b>	<input type="text" value="Health Communication"/>	<a href="#">Remove</a>

## Session-based Emails

Using the **Session Search Criteria** section, you can create your targeted set of data using the **Standard Search Criteria** and other select criteria. Select the **Email Format** to begin. The Session Search is session-based data. A typical **Session Custom Email** would be to search for all sessions of a specific kind (poster sessions, for example).

Select Format ⓘ Edit

Email

---

Select Search Criteria ⓘ Edit

+ Add

+ Show Full List

**SEARCH CRITERIA**

**Session Search Criteria**

Session ID	<input type="text"/>	Remove
Submitter First Name	<input type="text"/>	Remove
Submitter Last Name	<input type="text"/>	Remove
Session Kind	Select	Remove
Session Title	<input type="text"/>	Remove
Session Type	<ul style="list-style-type: none"><li>Opening Plenary Session 1</li><li>Oral</li><li>Plenary Session 3</li><li>Poster</li></ul>	Remove

## People-based Emails

Using the **People Search Criteria** selection, you can target emails to specific groups of users. To begin, select the **Email** format. Then using your template, select the search criteria you wish to use. A typical search would be to find all users with the Reviewer role.

Select Format ⓘ Edit

Email

---

Select Search Criteria ⓘ Edit

+ Add

[+ Show Full List](#)

**SEARCH CRITERIA**

**Standard Search Criteria**

First Name	<input type="text"/>	<span>⋮</span>	<a href="#">Remove</a>
Last Name	<input type="text"/>		<a href="#">Remove</a>
Email Address	<input type="text"/>		<a href="#">Remove</a>
<input type="text" value="User Type"/>	<input type="text" value="Review Center"/> <input type="text" value="Review Center Admin"/> <input type="text" value="Review 2"/> <input type="text" value="Abstract Submissions"/> <input type="text" value="Invited Speaker Submissions"/>		<a href="#">Remove</a>

## Sending Emails

Whether you are using abstract, session, or people data for your Email creation/send, your next step is to choose your template. You will also be asked to test your custom email by having ten sample emails sent to your email address. You can also preview the template to assure your tagging is correct. Your test emails will pull in the data the tags represent.



**Email Output** ⓘ [Edit](#)

**Email Template**

Reviewer Notification ▼ **Preview**

**Send up to 10 test emails to:**

amelia@test.com

After inputting the email and template data, click **Send Test Emails**.



**Email Output** ⓘ [Edit](#)

**Email Template**

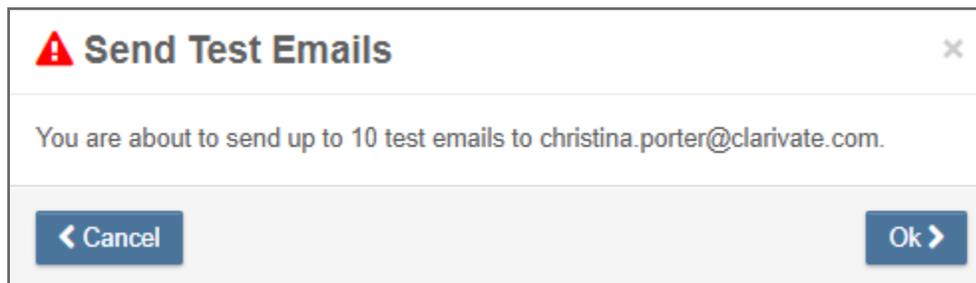
Reviewer Notification ▼ **Preview**

**Send up to 10 test emails to:**

amelia@test.com

[Clear Search](#) [Save Search](#) **Send Test Email**

You will get a confirmation of the emails being sent to you. Click **Cancel** if you know you have an error before sending the test email. Sending test emails is first step of sending an email. Click **Ok** to send the test emails.



**Send Test Emails** ×

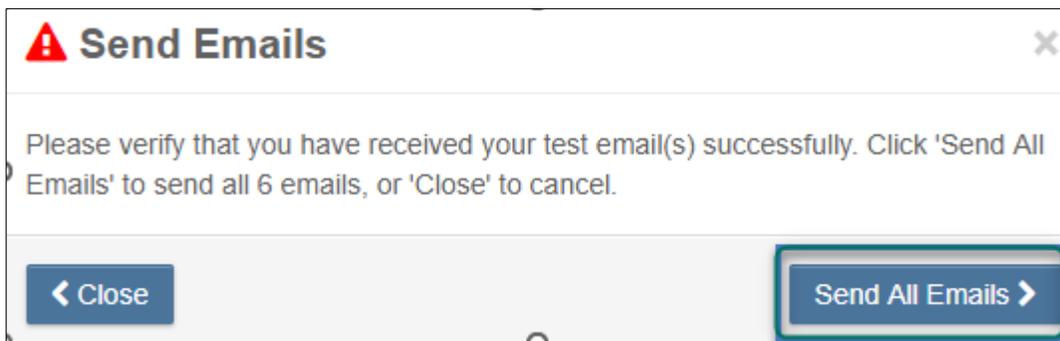
You are about to send up to 10 test emails to christina.porter@clarivate.com.

**Cancel** **Ok**

The emails will be sent to the email address specified. Preview your emails to assure your tags are displaying correctly and that formatting is correct. If you have an error in the email

template that you want to fix, click on **Close** to return to the beginning of the email send process. Fix your template and begin by sending yourself 10 emails.

Click **Send All Emails** after you verify the template is correct. Your email send will then be complete. You will see a confirmation of each email that was sent.



## SEARCH FOR EMAILS

You can search for previously sent emails using the **Search Emails** function. There are several criteria to use to search for specific emails - From: email address and To: email address, Abstract ID, Session ID, or Batch ID. You may also search for all emails that used a specific template, for emails based on a time frame, as well emails based on CC: and BCC: fields or the email status.

**Email Templates** are grouped by type, custom and system email templates. Under each group, the templates are then ordered alphabetically by name. If you use Speaker Management, there will also be a section for Invitation emails.

In the search results, the date and time each email was delivered is available. In conjunction, you may download a .csv file of the search results for further manipulation in Excel. You can also order the search results by clicking on any column in the search results returned.

From the search results, you can view and manually resend emails. You can preview and edit recipients and contents prior to re-sending the email.

Search Results (9 Records Found) [Export List to CSV](#)

TO	SUBJECT	RESULT	TEMPLATE NAME	BATCH ID	DATE SENT 
buksbastijan@gmail.com	MTS2023 Abstract Submitted (3923145) <a href="#">View</a> <a href="#">Re-send</a>	sent	Abstract Submitted		Apr 3, 2023 4:06 AM EDT
arthur.dent@gmail.com	MTS2023 Abstract Submitted (3929359) <a href="#">View</a> <a href="#">Re-send</a>	sent	Abstract Submitted		Apr 5, 2023 5:23 AM EDT
kate.heatcliff@gmail.com	MTS2023 Abstract Submitted (3929684) <a href="#">View</a> <a href="#">Re-send</a>	sent	Abstract Submitted		Apr 7, 2023 5:46 AM EDT
jane.rochester@gmail.com	MTS2023 Abstract Submitted (3929687)	sent	Abstract Submitted		Apr 7, 2023 6:40 AM EDT

## SYSTEM BLOCKED EMAILS

There are two types of email blocks:

- Bounce emails: email addresses that have expired, email addresses that are misspelled, or emails that go to inboxes which are full.
- Complaints: user has flagged the system email address as spam.

To monitor blocked addresses, view the **Blocked Email Addresses** report under **Admin>Email Administration>Blocked Email Addresses**. This report will include bounced email addresses and complaint email addresses.

**Admin Center**

- Dashboard >
- Search >
- User Administration >
- Email Administration >**
  - Templates
  - Send Email
  - Search Emails
  - Blocked Email Addresses**
  - Upload Custom Field Data
- Client Configuration >
- Data Export >

The report can be sorted by any column and can be exported to a .CSV file. Click the **Learn More About Email Blocking** link to access the full email guidelines. The link is available in the instructions above the report results. The report also shows the number of days remaining before another email will be attempted on a bounced email.

## Blocked Email Addresses

The report below lists email addresses which are currently blocked by the system. We cannot send email to blocked addresses. Email addresses are blocked due to a recent bounced attempt or because the recipient has marked similar emails from ScholarOne as spam. The 'Block Type' column denotes the reason for each email block. [Learn more about email blocking.](#)

[Edit](#)

**Search Results (1 Records Found)** [Export List to CSV](#)

EMAIL ADDRESS 	FIRST NAME	LAST NAME	BLOCK TYPE	DAYS REMAINING
bathilda.bagshot@gmail.com	Bathilda	Bagshot	Bounce	0

When a user has a blocked address (bounce or complaint), they will be alerted when they login.

 We are unable to deliver emails to alex0623@donotsend.com

[Go to Your Profile and Learn More >](#)

[Continue to not receive emails](#)

Choosing to not receive emails from this site may affect your ability to receive emails regarding your account, submissions, confirmations and more.

## Blocked Emails: Bounces

When an email is marked as a bounce, the system will not attempt to send another email to that address for 14 days. A user can access the account after 14 days to verify the email address and to resume receiving emails. At any time, a user can update the account's email address to immediately resolve the email issue.

## Blocked Emails: Complaints

For complaint bounces, the system will not attempt another email send until the user confirms they wish to receive emails again. Users can restart emails to their address at any time but must first unmark the email as spam in their email client. Holds on complaint bounces do not carry the 14-day suppression.

## UPLOAD CUSTOM FIELD DATA

A Society may wish to send out emails including data not part of the system and therefore not readily obtainable via a variable tag. This section in **Emails** allows you to populate a special field in the database with your unique data. A tag can then be created to house this data. The tag used is called **##custom\_field\_1##**. ***A template is provided for the input file.*** Here is a sample template:

	A	B	C	D
1	Control ID	Value		
2	123456	CE Applicable		
3	234567	CE Applicable		
4	345678	CE Applicable		
5	456789	CE Applicable		
6				
7				
8				
9				
10				

Once the template is complete, save it as a .csv file and upload it using the file upload.

### Upload Custom Field Data

Use this [template](#) to create the custom field import file. Save as a .csv file when done and import in the area below.

**Only one data set can be imported at a time.** To remove previous data, insert “\*\*blank\*\*” in the value column of the template and upload it as a new template.

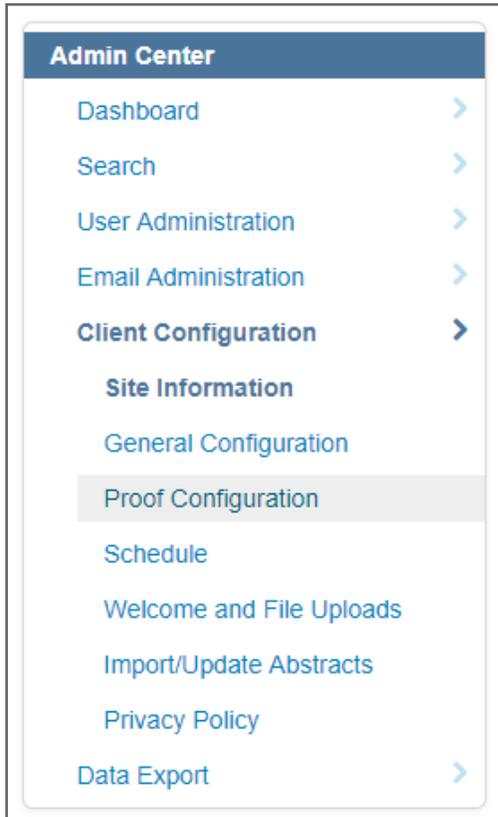
A Custom Field Data Log is available for reference.

### Custom Field Data Log

JOB ID	JOB TYPE	STATUS	START DATE	COMPLETED DATE	MESSAGE
14368	Update Custom Fields	Waiting to start			

## CLIENT CONFIGURATION

This section of Administration gives you the flexibility to configure certain parts of the system including some sections previously inaccessible to an Admin.



### SITE INFORMATION AND SITE TAGS

Site information tags are applicable to every site. There are five tags that must be configured for use in emails and instruction pages. They are: Site Contact Name, Site Contact Email Address, Site Contact Phone Number, Meeting Long Name and Meeting Short Name. These tags are useful in setting up signatures in emails, creating the Welcome Page message, and all instructions throughout the site.

Site Information ⓘ	
Site Contact Name:	Jane Administrator
Site Contact Email Address:	janeadmin@scholarone.com
Site Contact Phone Number:	434-964-4100
Meeting Long Name:	ScholarOne Annual Meeting
Meeting Short Name:	S1A AM 2016

Site Tags are unique tags that you can create to use in emails and instruction pages. You may wish to have a tag for Notification Date, for example. This lets you change the tag value at any time and emails and instructions will all be automatically updated. Site tags will appear in all capital letters at the top of the tag list.

To add a new tag, click **Add New Tag** at the bottom of the tag list. If you change a tag value, update the list by clicking on **Save Tag Changes**.

**Site Tags** 🔍 Edit

Search Criteria

Site Tag Name ▼

🔍 Search

SITE TAG NAME	SITE TAG VALUE	ACTION
##SESS_ABBV##	MJS23	Delete
Late Notification Date	June 04, 2023	Delete
Meeting Dates	October 25-29, 2023	Delete
Meeting Location	Novi Sad	Delete
Notification Date	June 01, 2023	Delete
Site Short Name	MJS23	Delete

+ Save Tag Changes

+ Add New Tag

## GENERAL CONFIGURATION

There are several items under **General Configuration**. This section provides control of key user functionality available within the **Submission** and **Session Proposal** centers.

### General Options

- Yes  No    Show the instructions link?
- Yes  No    Show the help popovers?
- Yes  No    Show submission status column on view submissions page?
- Yes  No    Allow author to delete abstracts?
- Yes  No    Allow author to withdraw abstracts?
- Yes  No    Do you want author withdrawn submissions to stay in the session?
- Yes  No    Allow proposer to delete session proposals?

- Show the instructions link: this option allows you to control whether the “Full Instructions” link displays to users in the Submission and Session Proposals centers.
- Show the help popover: this option allows you to determine whether the help popovers appear for the user.
- Show submission status column on view submission page: this allows an author to see what status an abstract is in at that moment. The decision status would show here.
- Allow authors to delete abstracts: this prevents an author from accidentally deleting an abstract during the submission period.
- Allow authors to withdraw abstracts: this prevents an author from accidentally withdrawing a submission. This makes the admin the only one with the ability to withdraw abstracts.
- Do you want author withdraw submissions to stay in the session: this prevents an author from withdrawing an abstract that has already been sessioned. It also allows you to control what abstracts are in each session, especially when sessioning is final.
- Allow proposer to delete session proposals: if configured for proposals, this allows you to maintain the integrity of a session that has already been sessioned in the Session Center.

## Institution List

Next is the **Institution List** feature. Upload a set of common institutions so that when an author creates an account or adds co-authors, the institution field will automatically populate once the first few letters are typed in by the user.

### Create Institution

13 CHARACTERS

✕

\* Institution

Department

\* Country / Region

United States
▼

\* State / Province

▼

\* City

⬅ Cancel

Submit Created Institution ➡

There is a 300-entry limit to the institution list. You can cut and paste the list into the text block or use a file upload link. To obtain the file upload link; upload a .txt file in the **Welcome and File Upload** section of **Client Configuration**. Insert the link in the **Institution List** box.

Institutions List [Edit](#)

/societyimages/training/Institution\_List.txt

G

## Submission and Session Proposal Text Editor Functions

Submission Text Editor Functions limit the types of formatting an author can use in the title, body, and images sections of the submission. To turn off bolding of a title for example, uncheck the **Bold** option under the **Title** section. The items that can be turned off are Bold, Italicize, Underline, Subscript, Superscript, and Capitalize. The Capitalize function converts the first letter of each word to a capital letter. For example: This Is An Example Of A Capitalized Title. This is a common editor option to turn off.

Submission Text Editor Options ⓘ

TEXT EDITOR OPTIONS	TITLE	BODY & IMAGES
Bold	<input type="checkbox"/>	<input type="checkbox"/>
Italics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Underline	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Subscript	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Superscript	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Capitalize	<input type="checkbox"/>	<input type="checkbox"/>

## System Page Instructions

System Page Instructions gives you quick access to some instructional pages that are difficult to navigate to normally. By clicking Edit, you can update any of these pages with your society specific language. **Login** is one page that is commonly updated via the **System Page Instructions**.

System Page Instructions ⓘ

Please report all login screen deadline extensions to your Client Manager so they can update the site's schedule and inform Technical Support of the change.

PAGE	EDIT INSTRUCTIONS
Create New Password	<a href="#">Edit</a>
Multiple Role Selection	<a href="#">Edit</a>
Login	<a href="#">Edit</a>
Forgot Password	<a href="#">Edit</a>
Access	<a href="#">Edit</a>
Disclosures	<a href="#">Edit</a>
Itinerary Planner Shared Session/Event Details	<a href="#">Edit</a>
Itinerary Planner Shared Presentation Details	<a href="#">Edit</a>
Popup for session proposal details	<a href="#">Edit</a>

## Announcement Message

The Announcement Message is available for configuring the **Announcement Box** that appears on the Login page and Welcome Page (single-sign-on users only). The announcement box is often used to announce an important message to the authors, such as a change in a submission deadline or when notifications are due to be distributed. ScholarOne may also use this message box to announce events such as downtimes and system upgrades. The message can be configured using HTML or plain text.

Announcements Message ⓘ

This highlighted banner can be configured to display any text you wish to communicate with your members. |

An example of an Announcement Message is below.

 Important Announcement

This highlighted banner can be configured to display any text you wish to communicate with your members.

**Welcome to the ScholarOne Conferences Submission Site!**

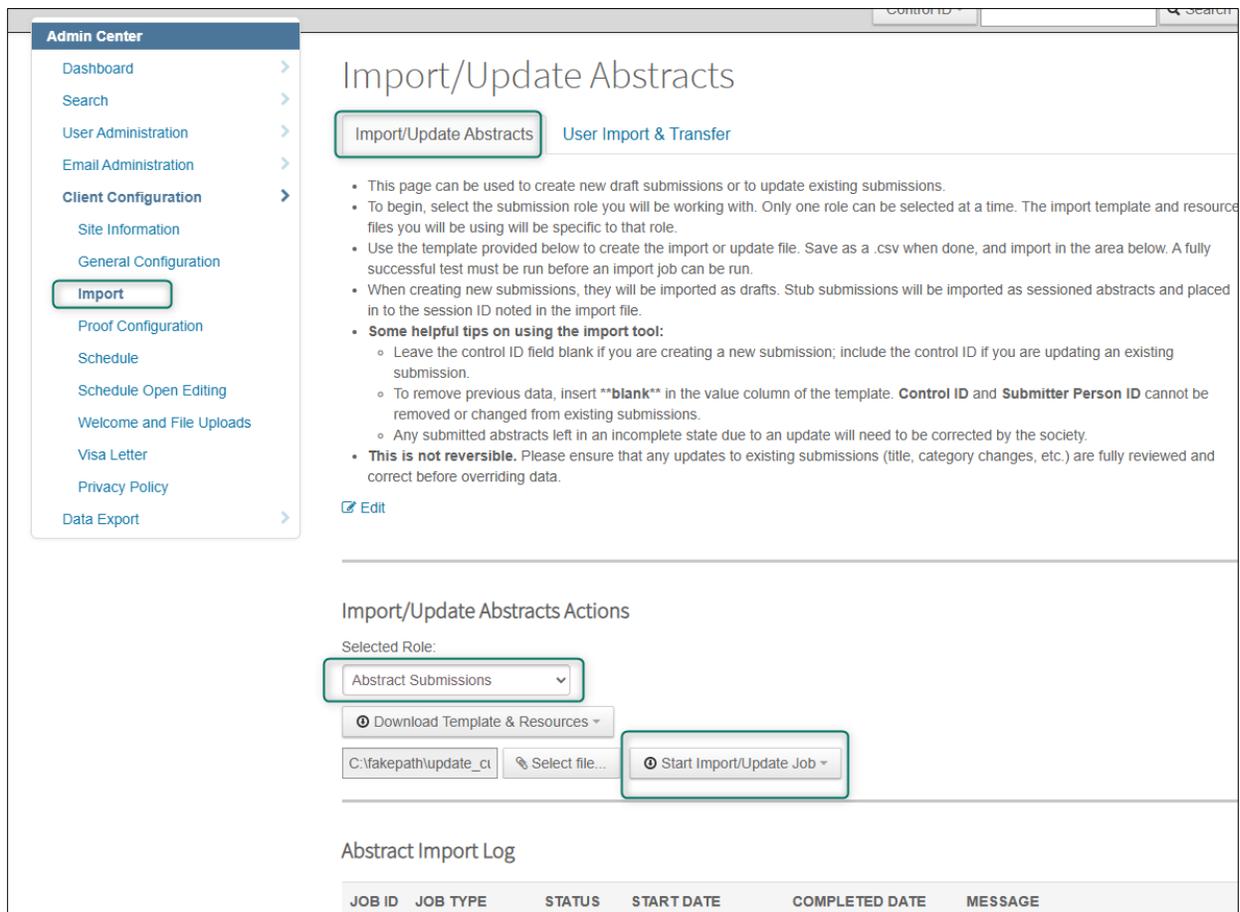
- Submission **begins** January 15, 2024, at 08:00 AM CET.
- Submission **ends** May 05, 2023, at 11:59 PM.
- **Notifications** will be emailed by June 01, 2023. If you do not receive your notification by June 04, 2023, please contact ScholarOne Conferences at [s1help@silverchair.com](mailto:s1help@silverchair.com).
- **Returning Users:** To submit an abstract, please log in with your User ID and Password.
- If you have an account on this year's site but do not remember your login information, choose **Forgot Password** above. If you are logging in for the first time, choose **Create an Account** to begin.
- **USER IDS AND PASSWORDS ARE CASE-SENSITIVE**

 SCHOLARONE  
CONFERENCES

## IMPORT

### Import/Update Abstracts

You can also create draft submissions or update existing submissions by uploading a template. The image below details the instructions and notes to perform the upload. You will need to first select a role and then create your import template. Once your template is complete, you will select the file from your drive and select **Start Import/Update Job**. Only one template can be used per role, however you may do multiple imports. You are required to perform a test before the full import will execute.



**Admin Center**

- Dashboard >
- Search >
- User Administration >
- Email Administration >
- Client Configuration >**
  - Site Information
  - General Configuration
  - Import**
  - Proof Configuration
  - Schedule
  - Schedule Open Editing
  - Welcome and File Uploads
  - Visa Letter
  - Privacy Policy
  - Data Export >

### Import/Update Abstracts

Import/Update Abstracts    User Import & Transfer

- This page can be used to create new draft submissions or to update existing submissions.
- To begin, select the submission role you will be working with. Only one role can be selected at a time. The import template and resource files you will be using will be specific to that role.
- Use the template provided below to create the import or update file. Save as a .csv when done, and import in the area below. A fully successful test must be run before an import job can be run.
- When creating new submissions, they will be imported as drafts. Stub submissions will be imported as sessioned abstracts and placed in to the session ID noted in the import file.
- Some helpful tips on using the import tool:**
  - Leave the control ID field blank if you are creating a new submission; include the control ID if you are updating an existing submission.
  - To remove previous data, insert **\*\*blank\*\*** in the value column of the template. **Control ID** and **Submitter Person ID** cannot be removed or changed from existing submissions.
  - Any submitted abstracts left in an incomplete state due to an update will need to be corrected by the society.
- This is not reversible.** Please ensure that any updates to existing submissions (title, category changes, etc.) are fully reviewed and correct before overriding data.

[Edit](#)

---

#### Import/Update Abstracts Actions

Selected Role:

Abstract Submissions

Download Template & Resources

C:\fakepath\update.ct    Select file...    Start Import/Update Job

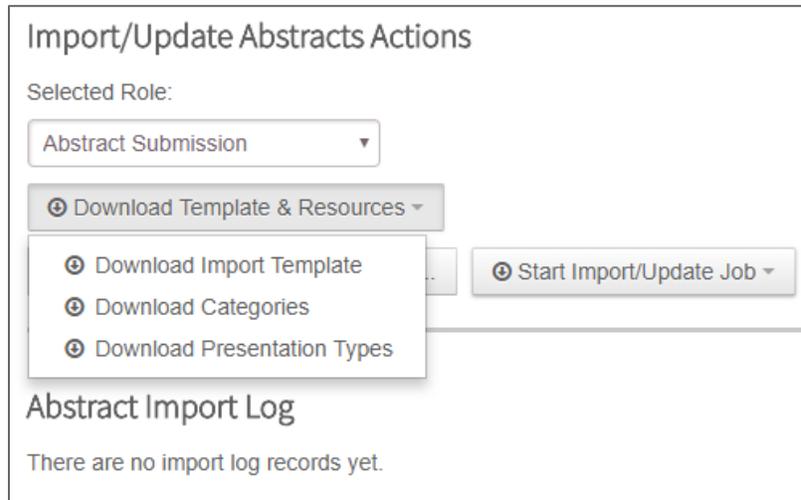
---

#### Abstract Import Log

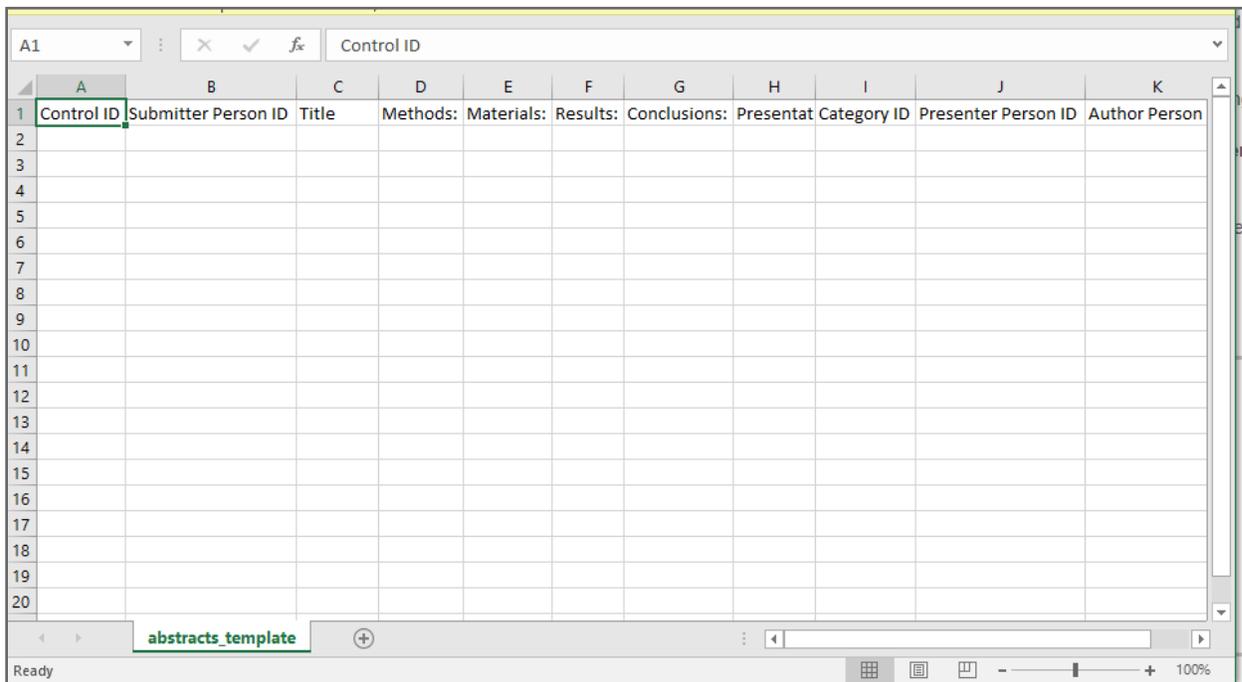
JOB ID	JOB TYPE	STATUS	START DATE	COMPLETED DATE	MESSAGE
--------	----------	--------	------------	----------------	---------

When creating new submissions, they will be imported as drafts. Stub submissions will be imported as sessioned abstracts and placed into the session ID noted in the import file. Your

first step is to select the template and resource files. The templates and resource files are based on the submission role you choose.



Below is a sample of a template used for an import. This template can be used for both full imports and for updates. Careful attention needs to be paid to the **Submission Role** as this determines which submission template is used.



1	Control ID	Submitter Person ID	Title	Methods: Materials: Results: Conclusions: Presentat	Category ID	Presenter Person ID	Author Person
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							

To remove earlier data, place **\*\*blank\*\*** in the value for that column. Control ID and Submitter Person ID cannot be removed or changed in existing submissions.

Any submitted abstracts left in an incomplete state due to an update will need to be corrected by the society. The incomplete abstracts can be found using the **Incomplete Submitted Abstracts** report found on the Submission Dashboard (referenced earlier).

**This is not reversible.** Please ensure that any updates to existing submissions (title, category changes, etc.) are fully reviewed and correct before overriding data.

## User Import & Transfer

You may wish to create new accounts in ScholarOne Conferences 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 you need further instructions on Import and Transfer accounts, please contact your Implementation Consultant for specific guides.

**Admin Center**

- Dashboard >
- Search >
- User Administration >
- Email Administration >
- Client Configuration >
  - Site Information
  - General Configuration
  - Import**
  - Proof Configuration
  - Schedule
  - Schedule Open Editing
  - Welcome and File Uploads
  - Visa Letter
  - Privacy Policy
  - Data Export >

## User Import & Transfer

Import/Update Abstracts
**User Import & Transfer**

- 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.

[Edit](#)

---

### User Import & Transfer Actions

Download Template & Resources -

Select file...

Start Import/Transfer Job -

---

### User Export

Start User Export Job

---

### User Import & Transfer Log

## PROOF CONFIGURATION

### Abstract Proof

Abstract Proof configuration is a necessary step for each role on your site. By clicking on an abstract's Control ID, a user should see a fully configured proof. It is very helpful to have role-specific proofs. For example, a submission role proof will have all the data entered by the author, including custom questions. A Reviewer proof may have other data elements including Average Score or Reviewer Comments.

Using the dropdowns, select each data elements you wish to include on each specific proof. To group data elements, select the **Heading** option in the proof items dropdown and then input your label in the field to the right. Some items that are often grouped are table and image information. The **Order** column allows you to reorder proof items as needed. To add additional proof items, click **+Add Proof Item** and select the new item from the dropdown to add it to the proof.

If you have a proof configured that will be the same for another role (or similar), you can copy the proof to the second role. Select the role for which you would like to create a new proof for in the Selected Role field. Then select the role to copy a proof from in the **Copy From:** field at the top of the proof configuration. Then select **Copy**. Once copied, the second role's proof can be updated or modified so that it is specific to that role.

### Abstract Proof Configuration

Selected Role :

Copy From :

ORDER	PROOF	PROOF TEXT	ACTION
<input type="text" value="1"/>	<input type="text" value="CONTROL ID"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="2"/>	<input type="text" value="TITLE"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="3"/>	<input type="text" value="PRESENTATION TYPE"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="4"/>	<input type="text" value="HEADING"/> <ul style="list-style-type: none"> <li>AVERAGE SCORE (Review Center Admin)</li> <li>AVERAGE SCORE (Review Center)</li> <li>AWARDS</li> <li>CHAIR COMMENTS</li> <li>CHAIR RECOMMENDATIONS</li> <li>CHAIR/PRESENTER INFORMATION</li> <li>CLIENT SESSION ID</li> <li>CONTROL ID</li> <li>CURRENT CATEGORY</li> <li>CURRENT SUBCATEGORY</li> <li>CUSTOM FIELD DATA</li> <li>DATE/TIME CREATED</li> <li>DATE/TIME LAST MODIFIED</li> <li>DATE/TIME SUBMITTED</li> <li>DECISION HISTORY</li> <li>DECISION STATUS</li> <li>DIGITAL OBJECT IDENTIFIER (DOI)</li> <li>EVENT LOG</li> <li>FINAL ID</li> <li>HEADING</li> </ul>	<input type="text" value="DETAILS"/>	<input type="button" value="Delete"/>
<input type="text" value="5"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="6"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="7"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="8"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="9"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="10"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text" value="11"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>

**Note:** Any role specific questions cannot be copied between roles. These fields will show as Blank on the resulting new role proof.

### Abstract Proof Configuration

Selected Role :

Copy From :

In the Proof text column, you can re-word the data element to customize it for your site.

ORDER	PROOF	PROOF TEXT
1	CONTROL ID	CID

## Session Proof

As with abstracts, you will need to configure **Session Proofs** for viewing sessions. For example, you will have a **Session Admin Proof** that will likely include all the applicable data elements for a session, but you may have a **Sessioner Proof** that has only a subset of data elements pertinent to a **Sessioner**. For the **Session Proof**, you may use the **Order** column to reorder the data elements and use the **Delete** button to remove unwanted data points. Session proofs, like abstract proofs, can be copied from one role to another using the **Copy** function. Use the **Proof** text column to alter a proof item's wording. To add additional proof items, click +Add Proof Item and select the new item from the dropdown to add it to the proof.

The abstract proof fields are at the bottom of the **Session Proof**. To make a complete **Session Proof**, include both session details and abstract details. The label for a session or abstract data point can be customized in the **Proof Text** field. Use the **Order** column to change the order of the proof elements. Standard proof elements can be removed with the **Delete** button. To add or change a proof option, select the dropdown to see a listing of the proof options.

### Session Proof Configuration

Selected Role :  ▼

Copy From :  ▼

### Session Proof Fields

Note proof text is used for both Event and Session. So be sure the text will be correct for both variants.

ORDER	PROOF	PROOF TEXT	ACTION
<input type="text" value="1"/> ▼	<input type="text" value="SESSION TITLE"/> ▼	<input type="text" value="Session Title"/>	<input type="button" value="Delete"/>
<input type="text" value="2"/> ▼	<input type="text" value="SESSION TYPE"/> ▼	<input type="text" value="Session Type"/>	<input type="button" value="Delete"/>
<input type="text" value="3"/> ▼	<input type="text" value="SESSION START TIME"/> ▼	<input type="text" value="Session Start Time"/>	<input type="button" value="Delete"/>
<input type="text" value="4"/> ▼	<input type="text" value="SESSION DURATION"/> ▼	<input type="text" value="Duration"/>	<input type="button" value="Delete"/>
<input type="text" value="5"/> ▼	<input type="text" value="SESSION LOCATION"/> ▼	<input type="text" value="Session Location"/>	<input type="button" value="Delete"/>
<input type="text" value="6"/> ▼	<input type="text" value="SESSION HOST"/> ▼	<input type="text" value="Session Host"/>	<input type="button" value="Delete"/>

---

**Abstract Proof Fields**

ORDER	PROOF	PROOF TEXT	ACTION
<input type="text" value="1"/> ▼	<input type="text" value="SESSION ABSTRACT SORT ORDER"/> ▼	<input type="text" value="Order"/>	<input type="button" value="Delete"/>

**Note:** There is a limit of 8 items that can be added for abstract proof fields on the session proof. Once you have reached 8 fields, the ADD PROOF ITEM will be grayed out.

## Symposia Proof

If your site is configured to use Symposia, you will also see a tab for **Symposium Proofs**. For the **Symposium Proof**, you may use the **Order** column to reorder the data elements and use the **Delete** button to remove unwanted data points. Symposium proofs, like abstract proofs, can be copied from one role to another using the **Copy** function. Use the **Proof** text column to alter a proof item's wording. To add additional proof items, click **+Add Proof Item** and select the new item from the dropdown to add it to the proof.

The abstract proof fields are at the bottom of the **Symposium Proof**. To make a complete **Symposium Proof**, include both symposium details and abstract details. When viewing the proof, Admins will see the Symposium details at the top, then unassigned abstracts (those not assigned to a session) under the symposium details. They will then be followed by the session proofs for those sessions tied to the symposium.

The label for a symposium or abstract data point can be customized in the **Proof Text** field. Use the **Order** column to change the order of the proof elements. Standard proof elements can be removed with the **Delete** button. To add or change a proof option, select the dropdown to see a listing of the proof options.

---

**Note:** There is a limit of 8 items that can be added for abstract proof fields on the symposium proof. Once you have reached 8 fields, **ADD PROOF ITEM** will be grayed out.

---

**Symposium Proof Configuration**

Selected Role :

Copy From :

**Symposium Proof Fields**

ORDER	PROOF	PROOF TEXT	ACTION
<input type="text" value="1"/> <input type="button" value="v"/>	<input type="text" value="SYMPOSIUM TITLE"/> <input type="button" value="v"/>	<input type="text" value="Symposium Title"/>	<input type="button" value="Delete"/>
<input type="text" value="2"/> <input type="button" value="v"/>	<input type="text" value="SYMPOSIUM TYPE"/> <input type="button" value="v"/>	<input type="text" value="Symposium Type"/>	<input type="button" value="Delete"/>
<input type="text" value="3"/> <input type="button" value="v"/>	<input type="text" value="SYMPOSIUM LEARNING OBJECTIVES 1"/> <input type="button" value="v"/>	<input type="text" value="Custom Question"/>	<input type="button" value="Delete"/>
<input type="text" value="4"/> <input type="button" value="v"/>	<input type="text" value="SYMPOSIUM TOPIC"/> <input type="button" value="v"/>	<input type="text" value="Symposium Topic"/>	<input type="button" value="Delete"/>

**Abstract Symposia Proof Fields:**

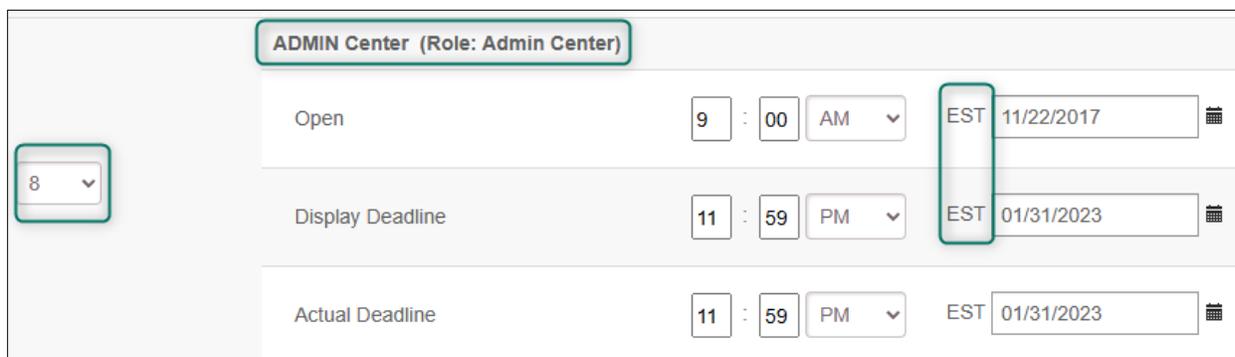
**Abstract Proof Fields**

ORDER	PROOF	PROOF TEXT	ACTION
<input type="text" value="1"/> <input type="button" value="v"/>	<input type="text" value="CONTROL ID"/> <input type="button" value="v"/>	<input type="text" value="Control ID"/>	<input type="button" value="Delete"/>
<input type="text" value="2"/> <input type="button" value="v"/>	<input type="text" value="TITLE"/> <input type="button" value="v"/>	<input type="text" value="Title"/>	<input type="button" value="Delete"/>
<input type="text" value="3"/> <input type="button" value="v"/>	<input type="text" value="PRESENTER"/> <input type="button" value="v"/>	<input type="text" value="Speaker"/>	<input type="button" value="Delete"/>
<input type="text" value="4"/> <input type="button" value="v"/>	<input type="text" value="PRESENTATION TYPE"/> <input type="button" value="v"/>	<input type="text" value="Presentation Type"/>	<input type="button" value="Delete"/>

**Note:** If a symposium has abstracts which are not assigned to a session, the abstracts will appear at the top of the proof under the symposium header. Assigned abstracts will appear in the Abstract section below the symposium proof.

## SCHEDULE

The Schedule governs the opening and closing of all roles on your site. There are three dates for each role: **Open, Display Deadline, and Actual Deadline**. Your open dates should reflect the earliest date that role will become live. For example, a submission role open date and time should be the earliest you would allow a submission. The **Display Date** is used if you wish to advertise a close date and time, but in the background keep the role open until the **Actual Deadline**. The display date appears on the author's abstract list. This strategy works well with submission roles where you want to advertise an end date/time, but really will allow final submissions to go through up until the **Actual Deadline**. This also works well with Reviewer and Sessioner roles.



ADMIN Center (Role: Admin Center)	
Open	9 : 00 AM EST 11/22/2017
Display Deadline	11 : 59 PM EST 01/31/2023
Actual Deadline	11 : 59 PM EST 01/31/2023

It is your responsibility to assure the dates and times on the Schedule are correct. You can make updates to your schedule directly on this page. If there is a role that is configured to not be editable (like an Admin role or export date) please contact your Client Implementation Manager to make the change.

---

**Note:** The Schedule is in Eastern Time (US). The system automatically accounts for Daylight and Standard Time as indicated above. It is not possible to change the time zone.

---

## Open Editing Schedules

If a role has reached its Actual Close Date, the user will get a message stating the role access has expired.

If configured, your site may use Open Editing. The opening editing period is when a submitter can access their abstract for additional editing after the decision has been made. The Opening and Closing dates are configured below the original submission open and close dates.

**AUTHOR Center (Role: Abstract Submissions)**

Open	9	:	00	AM	EST	01/15/2023	📅
Display Deadline	11	:	59	PM	EDT	05/05/2023	📅
Actual Deadline	2	:	59	AM	EDT	05/05/2023	📅
Open Editing Start Date	8	:	00	AM	EDT	05/31/2023	📅
Open Editing End Date	11	:	59	PM	EDT	06/04/2023	📅

To select which steps of the submission will be available during open editing, select Schedule Open Editing from the left side menu.

**Admin Center**

- Dashboard >
- Search >
- User Administration >
- Email Administration >
- Client Configuration >**
  - Site Information
  - General Configuration
  - Import
  - Proof Configuration
  - Schedule
  - Schedule Open Editing**
  - Welcome and File Uploads
  - Visa Letter
  - Privacy Policy
  - Data Export >

## Schedule Open Editing

- Schedule the open editing period for each submission role by selecting a start and end date for each role. If there are pages in submission that you do not want edited during this period, please uncheck those pages.
- Note:** Be sure to alert your Client Implementation Manager of any deadline changes. This will help in planning for support and to alert you if you've changed a deadline to a date that there is an outage.

[Edit](#)

**ABSTRACT SUBMISSIONS**

Open Editing Start Date	8	:	00	AM	EDT	05/31/2023	📅
Open Editing End Date	11	:	59	PM	EDT	06/04/2023	📅

SUBMISSION PAGE(S)	ALLOW OPEN EDITS
Title/Body	<input checked="" type="checkbox"/>
Properties	<input checked="" type="checkbox"/>
Authors	<input checked="" type="checkbox"/>
Disclosures	<input type="checkbox"/>

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 Effective Date: April 8, 2025  
 Document Version: 1.0

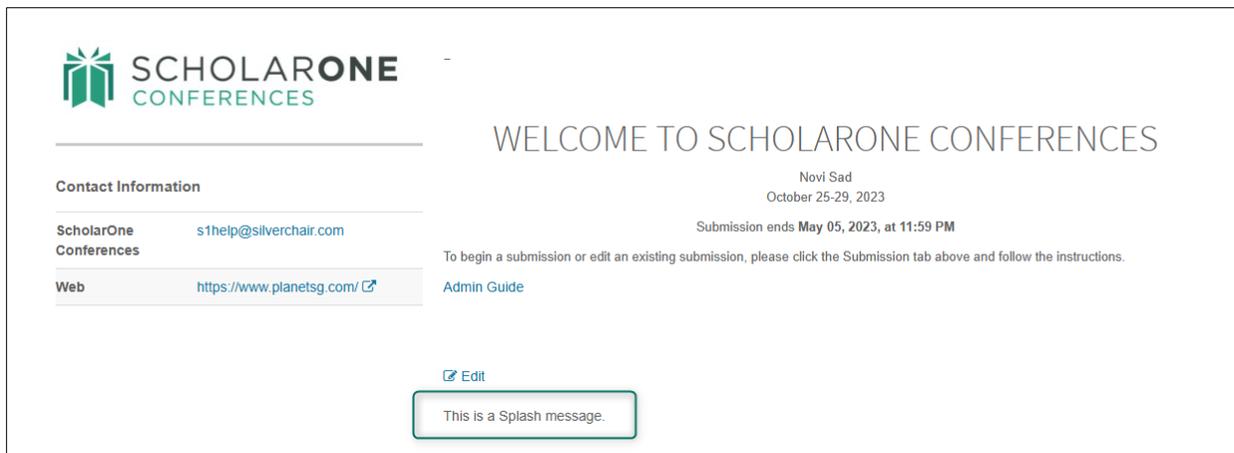

**SILVERCHAIR**

## WELCOME AND FILE UPLOADS

There are several options under Welcome Page and File Uploads.

### The Welcome Message

To configure additional text on your Welcome page, you can add text to the Splash Message and Additional Information text boxes. The Splash Message text will appear below your Welcome page text and cannot be edited from the Edit Instructions link on the Welcome page. It is not often used for this reason.

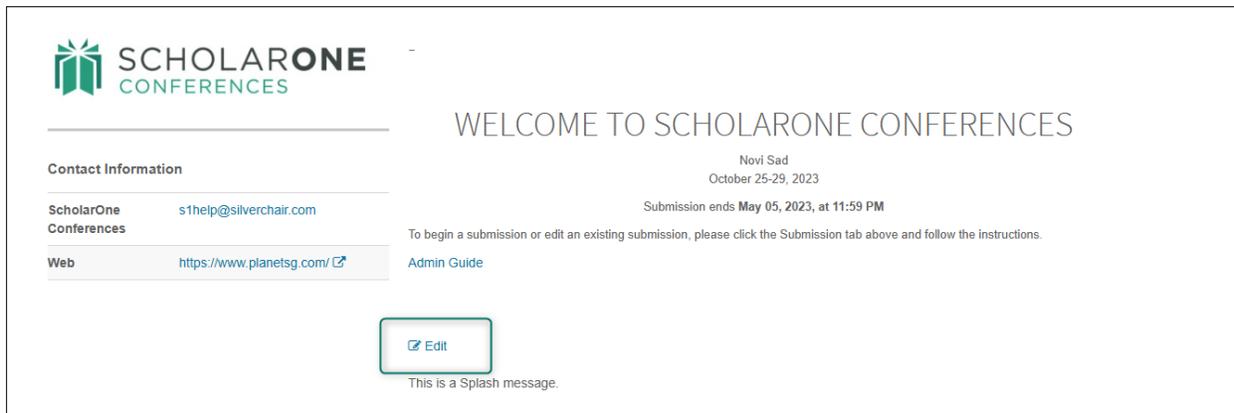


The screenshot displays the 'WELCOME TO SCHOLARONE CONFERENCES' page. On the left, there is a 'Contact Information' section with the following details:

- ScholarOne Conferences: [s1help@silverchair.com](mailto:s1help@silverchair.com)
- Web: <https://www.planetsg.com/>

On the right, the main heading is 'WELCOME TO SCHOLARONE CONFERENCES'. Below it, the location and dates are listed: 'Novi Sad, October 25-29, 2023'. The submission deadline is 'Submission ends May 05, 2023, at 11:59 PM'. A note states: 'To begin a submission or edit an existing submission, please click the Submission tab above and follow the instructions.' Below this note is an 'Admin Guide' link. At the bottom center, there is an 'Edit' button with a pencil icon. Below the 'Edit' button, a text box contains the message: 'This is a Splash message.'

The **Welcome Message** also uses the **Edit** feature found at the bottom of the **Welcome Page** screen.



This screenshot is identical to the one above, showing the 'WELCOME TO SCHOLARONE CONFERENCES' page with contact information, submission details, and an 'Edit' button. The text box below the 'Edit' button contains the message: 'This is a Splash message.'

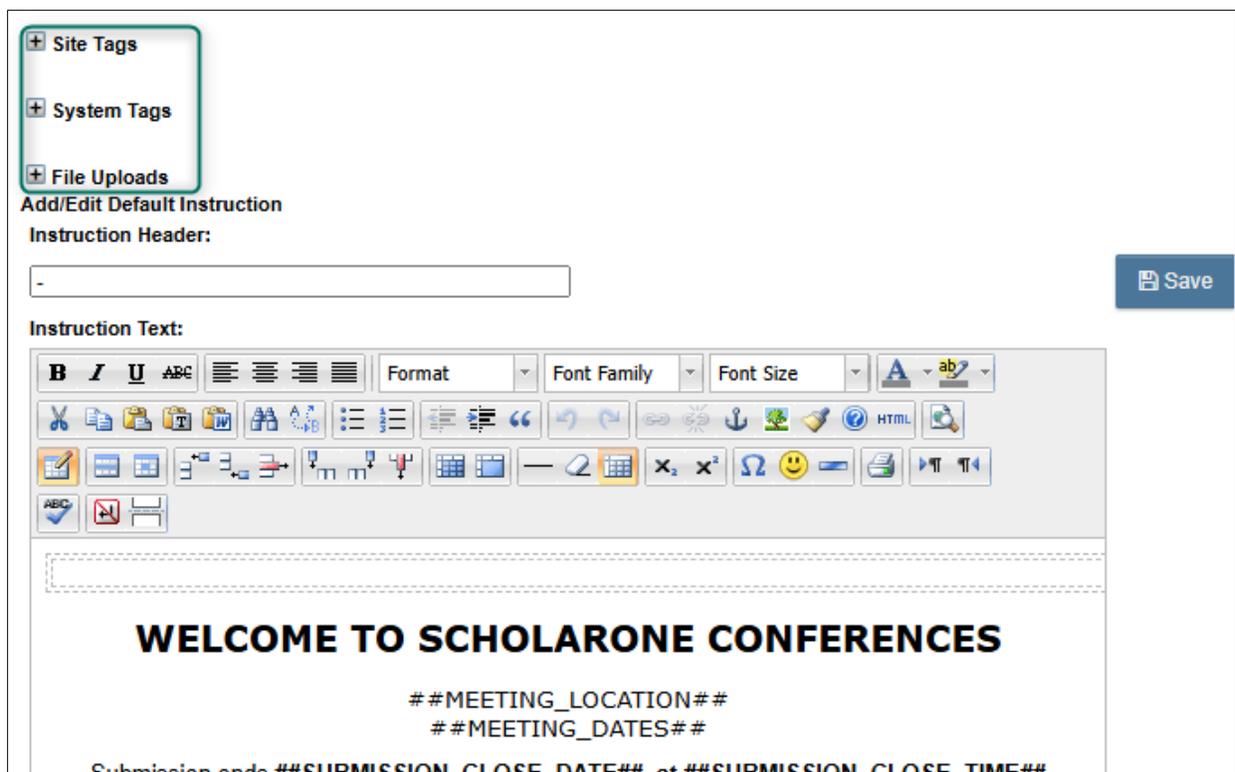


In addition to using body text, you can add information to the page contents using **System Tags**, **Variable Tags**, and **File Uploads**. Tags are preceded and ended with two-pound signs (##notification\_date##).

The system tags list contains the Society specific tags configured in **Configuration Settings**. They include tags for Society Contact Name, Society Contact Email Address, and Society Contact Phone Number. Simply copy the tag and paste it into the body section.

Variable tags are Society created. The tags can represent data that is used repeatedly in emails and instructions. Some examples are tags for notification date and conference location. Again, simply copy the tag and paste into the message body.

The last way to edit the **Welcome Message** is by including links to documents and/or images. Use the **File Uploads** section to choose a file, upload the file or image to the grid. Mark images if it applies. The file tag then appears for adding to the body text.



The screenshot shows the 'Add/Edit Default Instruction' interface. On the left, there are three expandable sections: 'Site Tags', 'System Tags', and 'File Uploads'. Below these is the 'Add/Edit Default Instruction' section, which includes an 'Instruction Header' field (currently empty) and an 'Instruction Text' field. The 'Instruction Text' field contains a rich text editor toolbar with various icons for text formatting (bold, italic, underline, text color, background color), alignment, indentation, bulleted and numbered lists, link, unlink, image, and video insertion, as well as undo, redo, and print options. Below the toolbar is a preview area showing the rendered instruction text:

**WELCOME TO SCHOLARONE CONFERENCES**

##MEETING\_LOCATION##  
##MEETING\_DATES##

Submission ends ##SUBMISSION\_CLOSE\_DATE## at ##SUBMISSION\_CLOSE\_TIME##

A 'Save' button is located in the top right corner of the editor area.

## Logo above the Society Contact Information

You can configure an image and text to appear on the top left of the Welcome Page (above the client information section). The text and image link will need to be placed in the **Additional Information** box above the **Welcome** Fields section. HTML may be used to format the text and to upload the image.

**Additional Information**

What additional information would you like to display?

The Annual conference coming soon!





**SCHOLARONE**  
CONFERENCES

## WELCOME TO SCHOLARONE CONFERENCES

Novi Sad  
October 25-29, 2023  
Submission ends **May 05, 2023**, at 11:59 PM

The Annual conference coming soon!

---

**Contact Information**

<b>ScholarOne Conferences</b>	<a href="mailto:s1help@silverchair.com">s1help@silverchair.com</a>	<p>To begin a submission or edit an existing submission, please click the Submission tab above and follow the instructions.</p> <p><a href="#">Admin Guide</a></p> <p><a href="#">Edit</a></p> <p>This is a Splash message.</p>
<b>Web</b>	<a href="https://www.planetsg.com/">https://www.planetsg.com/</a>	

## Welcome Fields

On the left of the Welcome Page is a section for including **Contact Information**. The information for each item is configured in **Welcome Fields** in **Client Configuration**. The information included for **Society Name** will display on the top of proof pages.

**Contact Information**

---

**ScholarOne Conferences** s1help@silverchair.com

---

**Contact Phone** \*\*\*\*\*

---

**Web** https://www.planetsg.com/ 

---

## Site Wide Banner and File Uploads

You will upload your site banner under **Site Wide Banner and File Uploads**. We recommend that banner images be approximately 650X65 pixels in size. Click **Add File** and browse to your banner file, mark it as a banner and click **Upload**. The banner will appear across the top of each page of your site. If the banner needs to be replaced, simply delete the current banner file and upload the new file. The **Delete** button is at the far right of the file summary box.

Site Wide Banner & File Uploads Edit

FILE NAME	BANNER?	LOGO?	FILE PATH	UPLOADED ON	
banner.png	<input checked="" type="checkbox"/>	No	logos/banner.png	23-Mar-2023	
S1A-Admin-Guide.pdf	<input type="checkbox"/>	No	/societyimages/maja/S1A-Admin-Guide.pdf	29-Mar-2023	
S1C_logo.jpg.jpg	<input type="checkbox"/>	Yes	/societyimages/maja/S1C_logo.jpg.jpg	14-Apr-2025	
users_template.csv	<input type="checkbox"/>	No	/societyimages/maja/users_template.csv	27-Apr-2023	

+ Add File

If you are uploading a logo for the **Welcome Page**, use the **File Uploads** functionality. When you upload the file, mark it as a logo. The logo will automatically appear to the left of the **Welcome Page** above the **Contact Information** section.

You can also upload files that can be used in instructions throughout your site. Once uploaded, the **file path** can be added to the end of your URL for the full link. The full link can then be included in your instructions and will reference the uploaded file.

Site Wide Banner & File Uploads <span>📘</span> <a href="#">Edit</a>				
FILE NAME	BANNER?	LOGO?	FILE PATH	UPLOADED ON
<a href="#">banner.png</a>	Yes	No	logos/banner.png	23-Mar-2023 
<a href="#">S1A-Admin-Guide.pdf</a>	No	No	<span style="border: 1px solid green; padding: 2px;">/societyimages/maja/S1A-Admin-Guide.pdf</span>	29-Mar-2023 
<a href="#">S1C_logo.jpg.jpg</a>	No	Yes	/societyimages/maja/S1C_logo.jpg.jpg	14-Apr-2025 
<a href="#">users_template.csv</a>	No	No	/societyimages/maja/users_template.csv	27-Apr-2023 

## VISA LETTER

If configured for your site, the **Visa Letter** section of **Client Configuration** allows you to create a Visa Letter template that can then be configured to appear under each user’s **Message** dropdown. (The **Messages** section also contains user **Invitations** and **Emails** and is located on the top right corner of each page).

There are two **General Options for Visa Letters**. You may show the **Visa Letter** to presenters when the abstract is accepted or when the abstract is sessioned.

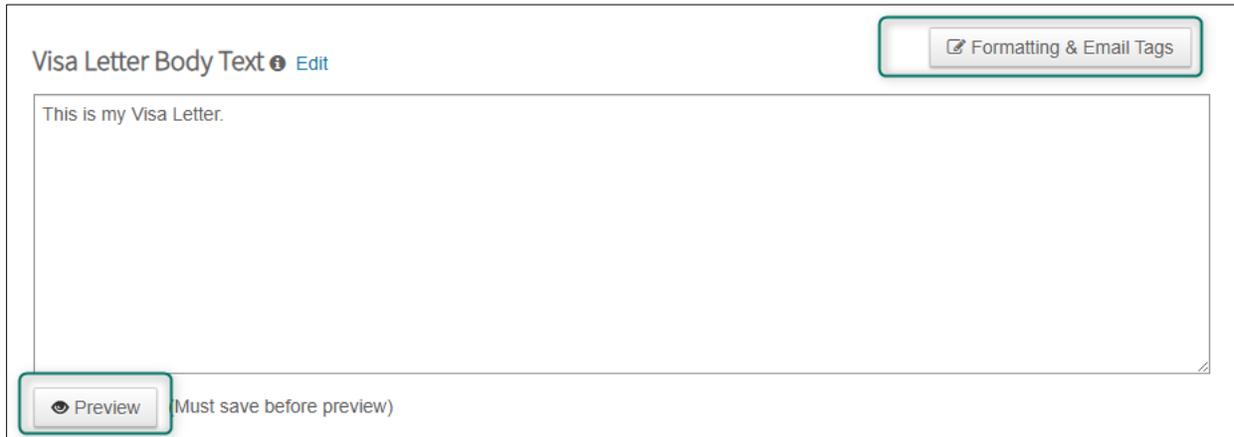
---

**Note:** This must be set at the time of acceptance or sessioning. For example: if it is changed to Yes after an abstract is accepted or sessioned, the letter will not appear for abstracts previously accepted or sessioned prior to the configuration change.

---

General Options <span>📘</span> <a href="#">Edit</a>		
<input checked="" type="radio"/> Yes	<input type="radio"/> No	Show visa letter in submission center for presenter(s) when abstract is accepted?
<input type="radio"/> Yes	<input checked="" type="radio"/> No	Show visa letter in submission center for all authors when abstract is accepted?
<input checked="" type="radio"/> Yes	<input type="radio"/> No	Show visa letter in submission center for presenter(s) when abstract is sessioned?

The **Visa Letter Body Text** can be created using the special Formatting and the Email Tags link on the top right. Only those tags and formatting options displayed can be used in visa letters.



Visa Letter Body Text [Edit](#) Formatting & Email Tags

This is my Visa Letter.

Preview (Must save before preview)

## PRIVACY POLICY

To configure the Privacy step for account creation and account edit, complete the following steps:

- Enter your society name in the **Privacy Acknowledgement Link** text field. Suggested format is *[Society Name] Privacy Policy*.
- Enter the **Privacy Policy URL** in the **Privacy Acknowledgement URL** field.
- Enter the **Privacy Policy Update Date**. You may update your **Privacy Policy** as often as needed. Edit the **Privacy Policy Update Date** field to activate the new policy.
  - When a user comes to the system for the first time after the **Privacy Policy Update Date**, they will be prompted to review the updated Privacy Policy upon login.
- Click **Save** and your **Privacy Policy** is active on your site.

**Admin Center**

- Dashboard >
- Search >
- User Administration >
- Email Administration >
- Client Configuration >**
  - Site Information
  - General Configuration
  - Import
  - Proof Configuration
  - Schedule
  - Schedule Open Editing
  - Welcome and File Uploads
  - Visa Letter
  - Privacy Policy
  - Data Export >

## Privacy Policy

1. Enter the society name in Privacy Acknowledgement Link text area. Suggested format is Society Name Privacy Policy.
2. Enter the Privacy Policy URL in Privacy Acknowledgement URL text area.
3. Enter the Privacy Policy Update Date.
  - When a user comes to the system for the first time post the Privacy Policy Update Date, they will be prompted to review the updated Privacy Policy upon login.
4. Click Save and your Privacy Policy is active on the site!
  - You may update the Privacy Policy as often as needed, just be sure to update the Privacy Policy Update Date.

[Edit](#)

Privacy Acknowledgment Link Text:

Privacy Acknowledgment URL:

Privacy Policy Update Date:

---

[Save](#)

### Key points about the Privacy Policy:

- Society staff roles are not required to acknowledge the privacy policy as they are employees.
- Proxy users cannot change the privacy policy acknowledgement on behalf of another user.
- Admins cannot acknowledge the privacy policy when creating a new user account.
- If a user does not wish to agree to the privacy policies and chooses to remove their account, they will only be able to do so if they have no assignments within the system. The user may contact the Admin to remove those assignments, so they may be able to remove their account.

### Removal of Accounts

During account creation and account updates, a user can decline their acceptance of the privacy policies. They will then indicate they are requesting the removal of their account. If their account is not tied to any abstracts, review tasks, or sessioning tasks it will be deleted, and they will get a confirmation of the deletion.

In the case that their account is tied to abstract(s), review tasks, or sessioning tasks, they will receive a message stating they must contact the society admin to remove the account.

## Privacy Acknowledgment

[Edit](#)

To ensure you are properly informed of your privacy rights while using this website, we ask that you review and acknowledge the relevant privacy policies linked below.

Clarivate Analytics/ScholarOne, owners of this site

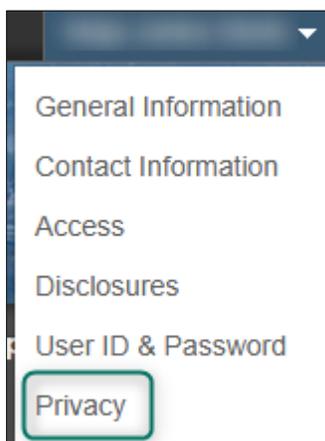
**\* Yes, I have read and now acknowledge the linked privacy policies**

We cannot automatically remove your account at this time. Please contact the society at [s1help@silverchair.com](mailto:s1help@silverchair.com) and reference Abstract Control IDs: 3916995, 3917931, 3923139, 3923145, 3929359, 3929684, 3929687, 3976807, 3987311, 3987313, 3987315, 3987317, 3987355, 3987374, 3987385, 3987387, 3987389, 3987419, 3987430, 4006765, 4017230, 4018766, 4068788, 4068792, 4070940, 4070942 and Session IDs: 462022, 473587, 473601, 476132, 492478, 493135, 499744 for assistance.

---

To remove an account, you must update the user’s information by removing the user from any abstracts, reviewer tasks, and/or sessioning tasks.

To remove them as an author on an abstract, perform an Abstract Search using the HTML format. In the results, you will find titles as a hyperlink. Click on the title to be taken into a submission. From there, you can remove the user as an author.



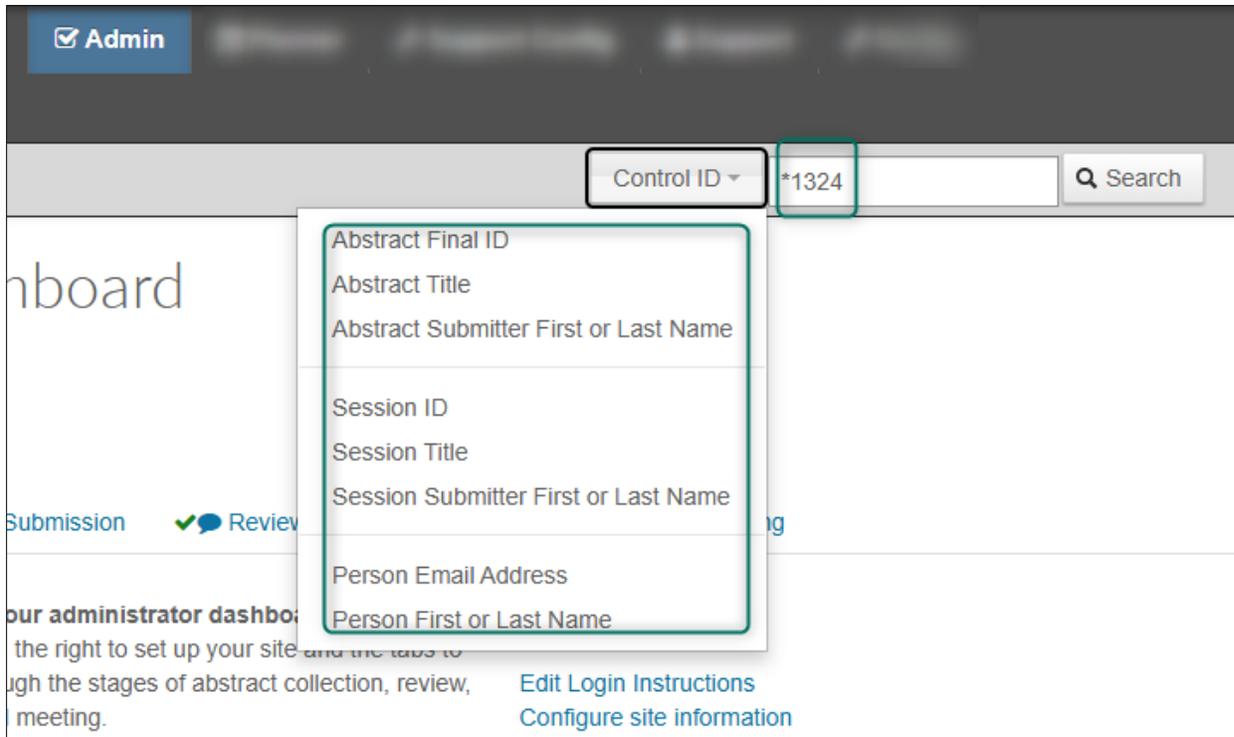
To remove reviewer tasks (if they have reviewed), access the Review Center. Search for their name in the Assign Reviewers People Grid (select the reviewer role they were assigned to). Click on the + sign to expand their assignments. Remove the abstracts assigned to the user using the Remove options to the right of each Control ID.

For session tasks, choose Assign Sessioner from the left menu in the Review Center. Choose the applicable session role and search for their name. Follow the same procedures as for removing review tasks.

When all abstracts, review tasks, and sessioner tasks have been removed, you can notify the user that they can remove their account by accessing the Privacy step on their account.

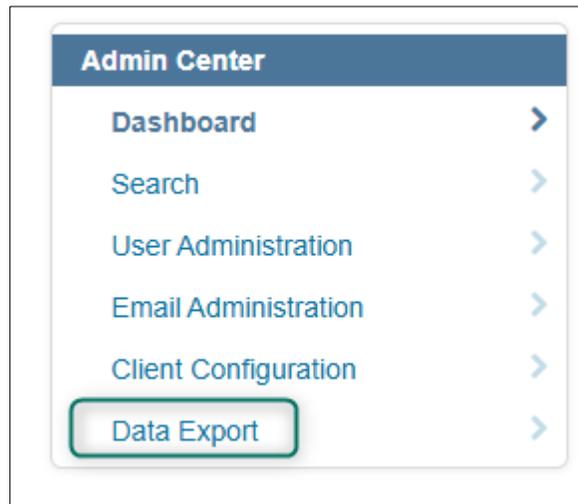
## QUICK SEARCH

The Admin tab includes a Quick Search Feature. It can be used to search for abstracts, sessions, or persons. You can use a wild card search if you do not have complete information. Enter a partial search term and add an \* to the end of the term.



## DATA EXPORT

The **Data Export Tool** provides a way to access standard and custom reports which are programmed specifically for your data exports.



The Data Export Tool has several standard reports. If you have a custom report, you can also download the data from the tool.

Standard Reports include:

- Standard Abstract Book (html)
- Standard Program Book (html)
- Author Index (html)
- Category Index (html)
- Institution Index (html)
- Keyword Index (html)
- Standard Session Proposal Report (csv)
- Standard eCommerce Report (csv)

For detailed information on the tool, see the **Data Export Tool Guide** on **Get Help Now**.

## APPENDIX

When using HTML to update instruction text or create your Welcome Message, the following entities and attributes below are allowed. Other HTML is prevented from being used. The previous unrestricted use of HTML in instructions posed a security risk and was therefore modified.

**Formatting elements:** "b", "i", "font", "s", "u", "o", "sup", "sub", "ins", "del", "strong", "strike", "tt", "code", "big", "small", "br", "span", "p", "div", "h1", "h2", "h3", "h4", "h5", "h6", "ul", "ol", "li", "blockquote", "hr", "em", "center"

**Formatting attributes:** "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck", "style", "tabindex", "title", "translate", "color", "background-color", "size", "target", "noshade"

**Table elements:** "table", "th", "tr", "td", "caption", "colgroup", "col", "thead", "tbody", "tfoot"

**Table attributes:** "align", "bgcolor", "border", "cellpadding", "cellspacing", "sortable", "summary", "width", "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck", "style", "tabindex", "title", "translate", "valign", "rowspan", "colspan"

**Video elements:** "video", "source"

**Video attributes:** "autoplay", "controls", "height", "loop", "muted", "poster", "preload", "src", "width", "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck", "style", "tabindex", "title", "translate"

For Assistance contact our support team at: [s1help@silverchair.com](mailto:s1help@silverchair.com)

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