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# Data Export Tool User Guide

*Updated April 2025*



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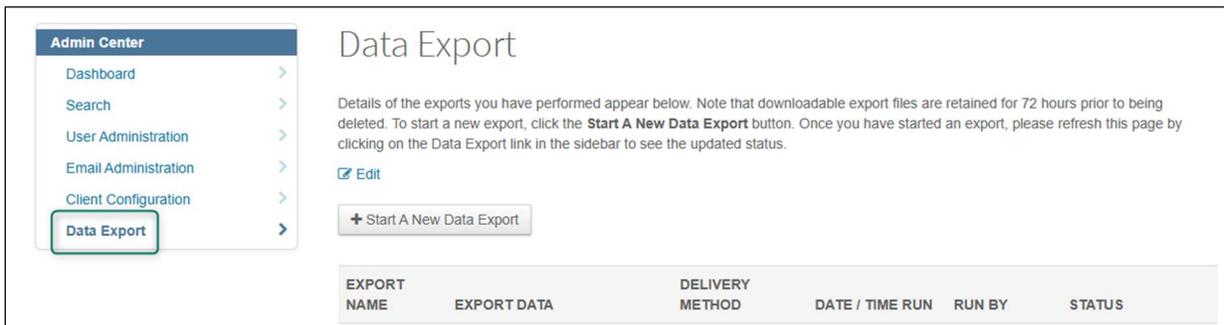
## DATA EXPORT OVERVIEW

With our Data Export tool, it is easier to connect and leverage ScholarOne Conferences data to your meeting services by streamlining the work of busy meeting planners, and making meeting content available in a quickly accessible, easily reusable format.

Access to this Tool may be granted to Session Admins and Administrators.

## ACCESS THE DATA EXPORT TOOL

The Data Export tool is accessible through the Admin tab on your ScholarOne Conferences site.



**Admin Center**

- Dashboard >
- Search >
- User Administration >
- Email Administration >
- Client Configuration >
- Data Export** >

### Data Export

Details of the exports you have performed appear below. Note that downloadable export files are retained for 72 hours prior to being deleted. To start a new export, click the **Start A New Data Export** button. Once you have started an export, please refresh this page by clicking on the Data Export link in the sidebar to see the updated status.

[Edit](#)

[+ Start A New Data Export](#)

EXPORT NAME	EXPORT DATA	DELIVERY METHOD	DATE / TIME RUN	RUN BY	STATUS
-------------	-------------	-----------------	-----------------	--------	--------

The Data Export window displays a list of recently run exports. The Status column shows the status of each export and contains a link to download the data where appropriate. Data files are automatically deleted 72 hours after they were created.

## Data Export

Details of the exports you have performed appear below. Note that downloadable export files are retained for 72 hours prior to being deleted. To start a new export, click the **Start A New Data Export** button. Once you have started an export, please refresh this page by clicking on the Data Export link in the sidebar to see the updated status.

[Edit](#)

[+ Start A New Data Export](#)

EXPORT NAME	EXPORT DATA	DELIVERY METHOD	DATE / TIME RUN	RUN BY	STATUS
XML_People_Data	People	Download	N/A		Waiting to start <a href="#">Cancel Export</a>
XML_Session_Data	Sessions	Download	N/A		Waiting to start <a href="#">Cancel Export</a>
XML_Abstracts_data	Abstracts	Download	29-Apr-2025, 10:04 AM		Completed XML_Abstracts_data_Abstracts_2025-04-03.zip

## START A NEW DATA EXPORT

Click **Start A New Data Export**.

[+ Start A New Data Export](#)

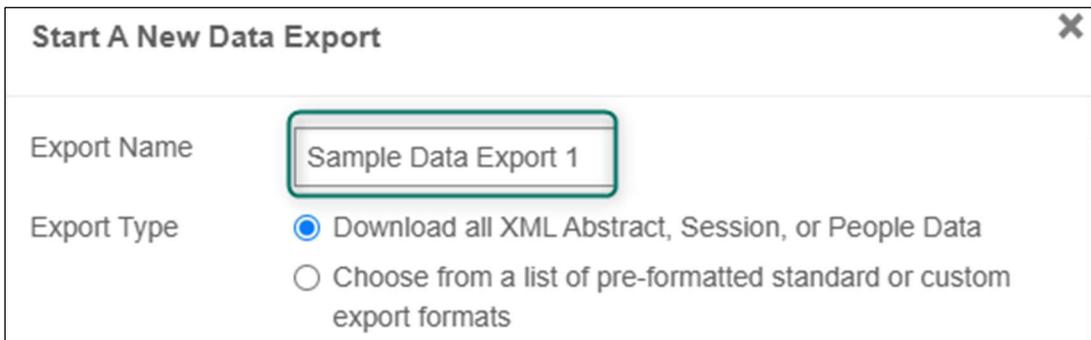
Prev 1 2 3 4 5 6 7 8 Next

Start a New Data Export that screen displays.

- Enter a descriptive **Export Name**.

- Select an **Export Type**
  - Download all XML Abstract, Session, or People Data **or**
  - Choose from a list of pre-formatted standard or custom export formats

See the sections below for more information on the two types of exports.



**Start A New Data Export** [X]

Export Name: Sample Data Export 1

Export Type:

- Download all XML Abstract, Session, or People Data
- Choose from a list of pre-formatted standard or custom export formats

## DOWNLOADING ABSTRACT, SESSION AND PEOPLE DATA IN XML FORMAT

The Data Export Tool allows you to download all your sessioned abstracts, session information, or people data in a standard XML format. XML is one of the most reusable data formats available. You can use this data to create reports or meeting deliverables such as Program or Abstract books. (You may also choose from a list of Pre-formatted reports. More information in the next example.)

### Export Type

Your first criteria to define is your **Export Type**. For XML output, select **Download all XML Abstract, Session, or People Data**.

### Start A New Data Export ✕

Export Name

Export Type  Download all XML Abstract, Session, or People Data  
 Choose from a list of pre-formatted standard or custom export formats

Export Data  Abstracts

Export by Submission Type

- All
- Abstract Submissions
- Invited Speaker Submissions
- Video Submissions

Export by Abstract Status

- All
- Draft
- Returned To Draft
- Submitted

Export Images for Abstracts XML

Export Abstract Detail Files for Abstracts XML

← Close Save →

## Export Data: Select Abstracts

To begin creating your Abstracts export, complete the following search criteria.

- Select **Abstracts** from the menu. Choose an option in each of the following Data Types:
- **Export by Submission Type:** Select the types for which you want the data. You may have only one submission type.

- **Export by Abstract Status:** Narrow your search results by status or select All.
- **Export Images for Abstracts XML:** A folder of image files will be included in the export. This field is optional.
- **Export Abstract Detail Files for Abstract XML:** The report will include data submitted in custom questions. This field is optional.

### Start A New Data Export ✕

Export Name

Export Type  Download all XML Abstract, Session, or People Data  
 Choose from a list of pre-formatted standard or custom export formats

Export Data  Abstracts

**Export by Submission Type**

- All
- Abstract Submissions
- Invited Speaker Submissions
- Video Submissions

**Export by Abstract Status**

- All
- Draft
- Returned To Draft
- Submitted

Export Images for Abstracts XML

Export Abstract Detail Files for Abstracts XML

← Close Save →

## Delivery Method

- Select **Download** to obtain the report in a file downloadable from the status chart.  
**or**
- Select **FTP**. Complete the following fields:
  - **Destination URL:** The URL of the FTP site.
  - **Destination Directory:** Where to place the data on the FTP site.
  - **FTP Username:** Your username for the FTP site.
  - **FTP Password:** Your password for the FTP site.
  - **Metadata Only** or **Files and Metadata:** Select one.

Delivery Method

Download

FTP/SFTP

Destination URL

Destination directory

FTP User Name

FTP Password

Metadata only

Files and Metadata

Click **Yes** to confirm you wish to have the data export executed.

---

**Note:** If you choose “Download”, the export contains only the XML file with links to other files. If you choose FTP, it contains all files including user images, supplemental files, and custom questions.

---

## Export Data: Select Sessions

To begin creating your Sessions export, complete the following search criteria.

- Select **Sessions** from the menu. Choose an option in each of the following Data Types:
- **Export Session Type:** select the specific session types or select All.
- **Export by Session Topics:** select the specific session topics or select All. If you do not use Topics select All.
- **Export Images for Sessions XML:** This is an optional field.
- **Export Abstract Detail Files for Session XML:** This option will output data from custom questions. This is an optional field. Abstract detail files can be exported based on a specific date range of when they were uploaded (not when abstract was submitted). If the *From* and *To* fields are left blank it will export all files regardless of the date they were uploaded. You can also choose specific files to export rather than downloading all files every time.
- **Export Speaker Management Files for Session XML:** This option will output files that were uploaded by presenters during the Invitation process. As for Abstract details, here you can also select the date range of when Speaker management files were uploaded and specify which ones you wish to export.
- **Ignore Withdrawn Abstracts:** This is an optional field.
- **Delivery Method:** See *Export Data: Select Abstracts* for information on the different delivery methods.

Click **Yes** to confirm you wish to have the data export executed.

---

**Note:** The Session XML includes all Speaker Management data elements.

---

### Start A New Data Export ✕

Export Data

Abstracts

Sessions

Export by Session Type

- All
- Opening Plenary Session 1
- Oral
- Plenary Session 3

Export by Session Topic

- All
- Evolution
- Presentation title 1
- Presentation title 2

Export Images for Sessions XML

Export Abstract Detail Files for Sessions XML

From:   To:  

Select which detail files to export

- All
- Abstract upload test

Export Speaker Management Files for Sessions XML

From:   To:  

Select which detail files to export

- All
- Photo

Ignore Withdrawn Abstracts

Delivery Method

People

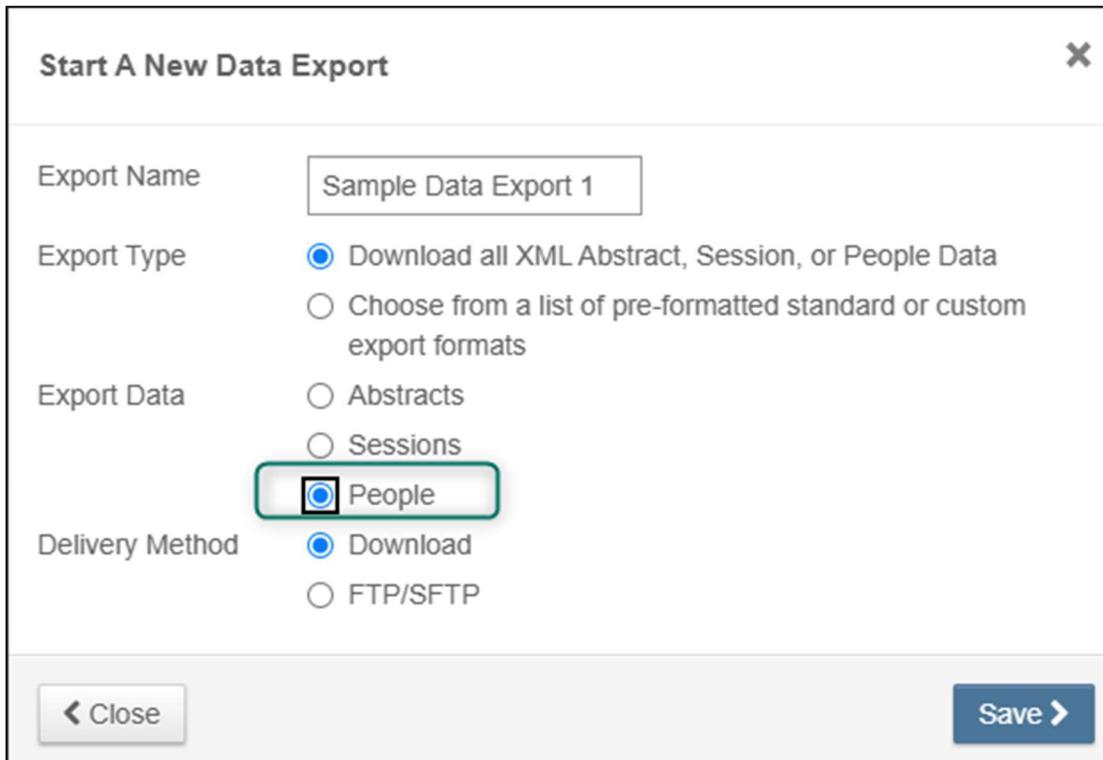
Download

FTP/SFTP

## Export Data: Select People

To begin creating your People export, complete the following search criteria.

- Select **People** from the menu.
- Select a **Delivery Method**. See *Export Data: Select Abstracts* for information on the two delivery methods.



**Start A New Data Export** [X]

Export Name:

Export Type:  
 Download all XML Abstract, Session, or People Data  
 Choose from a list of pre-formatted standard or custom export formats

Export Data:  
 Abstracts  
 Sessions  
 People

Delivery Method:  
 Download  
 FTP/SFTP

[< Close] [Save >]

Click **Yes** to confirm you wish to have the data export executed.

## DOWNLOADING PRE-FORMATTED STANDARD REPORTS

Using the Data Export tool, you can download several pre-formatted reports and custom reports. The **Standard Reports** will reflect your data. You can use these standard reports in your program or abstract guides. **Custom Reports** are reports that are pre-programmed to your specific requirements. See your Client Implementation Manager for more information on having your customized report programmed (often the pre-formatted exports will include your program guide or abstract book). If you want to customize your indices, you can also work with your Client Implementation Manager to have these programmed.

When downloading an Abstract Book or Program Book it is necessary to have the **Client Session IDs** in place on all sessions and events in the **Session Center**. The **Client Session IDs** determine the order of session output. **Client Session IDs** are placed on the sessions in the **Session Center**. If **Client Session IDs** are not placed on sessions, the reports from the **Data Export** tool will not produce a properly ordered report.

## STANDARD REPORTS

There are several standard reports that when running will reflect your data. You can use these standard reports to build your program information. Click on **View Example** to review an example of each report type. Select the report you want to run, and the report will appear in the list of all downloaded exports. Each report has option(s) for formatting specifications.

- 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)

### Start A New Data Export ✕

Export Name

Export Type

Download all XML Abstract, Session, or People Data

Choose from a list of pre-formatted standard or custom export formats

	NAME	FORMAT	DESCRIPTION	
<input type="radio"/>	Standard - Abstract Book	HTML	Details of all sessioned abstracts (excluding withdrawn abstracts), and the authors / institutions affiliated with each.	<a href="#">View a Sample</a>
<input type="radio"/>	Standard - Author Index	HTML	All authors on sessioned abstracts, sorted and organized by author last name and the final IDs of their abstracts (excluding withdrawn abstracts).	<a href="#">View a Sample</a>
<input type="radio"/>	Standard - Category Index	HTML	Category Index based on categories selected for sessioned abstracts	<a href="#">View a Sample</a>

< Close
Save >

### Export Standard Abstract Book: Options

- Author name format: choose the desired format.
- Institution Format: specify the formats you prefer.
  - Display the Institution as: department, institution, city, state, country.
  - or
  - Display the Institution name only
- Underline the presenter's name: optional field.
- Include Images: optional field.

- Include tables optional field.
- Abstract Sort Order and Format.
  - Alphabetically by Session Type  
or
  - By Client Session ID
- Add Page Break after Each Abstract: optional field

### Start A New Data Export ✕

export formats

NAME	FORMAT	DESCRIPTION	
<input checked="" type="radio"/> Standard - Abstract Book	HTML	Details of all sessioned abstracts (excluding withdrawn abstracts), and the authors / institutions affiliated with each.	<a href="#">View a Sample</a>

Author Name Format

- John Q. Public<sup>1,2</sup>, Jane Doe<sup>2,3</sup>
- J. Q. Public<sup>1,2</sup>, J. Doe<sup>2,3</sup>
- Public, John Q.<sup>1,2</sup>, Doe, Jane<sup>2,3</sup>
- Public, J. Q.<sup>1,2</sup>, Doe, J.<sup>2,3</sup>

Institution Format

- Display the institution as: department, institution, city, state, country
- Display the institution name only

← Close
Save →

**Institution Format**

Display the institution as: department, institution, city, state, country

Display the institution name only

Underline the presenter's name

Include Images

Include tables

**Abstract Sort Order**

Alphabetically by Session Type

Client Session ID

Add ##PAGE\_BREAK## after each abstract

Select **Save** and then confirm the export by clicking **Yes**. Status of the exports will appear on the main summary page.

### Export Standard Program Book: Options

- Author Name Format: Chose a format for the author's names.
- Institution Format
  - Display the Institution as: department, institution, city, state, country.
  - or
  - Display the Institution name only
- Session Times
  - Show session times based on whether the individual presentation times are displayed in the Itinerary Planner: optional field

**Start A New Data Export** ✕

<input checked="" type="checkbox"/>	Standard - Program Book	HTML	Details of the meeting program, including session title, time, and location information, and the option to include all sessioned abstracts (excluding withdrawn abstracts), and the authors / institutions affiliated with each.	<a href="#">View a Sample</a>
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Author Name Format

John Q. Public<sup>1,2</sup>, Jane Doe<sup>2,3</sup>  
 J. Q. Public<sup>1,2</sup>, J. Doe<sup>2,3</sup>  
 Public, John Q.<sup>1,2</sup>, Doe, Jane<sup>2,3</sup>  
 Public, J. Q.<sup>1,2</sup>, Doe, J.<sup>2,3</sup>

Institution Format

Display the institution as: department, institution, city, state, country  
 Display the institution name only

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

### Export Standard Institution Index: Options

- Delimiter: Select a format for the display of the Institution and Final ID. The delimiter can be a space, a dash, a colon, or a comma.
- Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

Standard - Institution Index      HTML      Institution Index based on Department and Institution for sessioned abstracts      [View a Sample](#)

Delimiter option between Institution and final ID

Cincinnati Children's Hospital, Department of Pediatrics  
168, 256, 674

Cincinnati Children's Hospital, Department of Pediatrics -  
168, 256, 674

Cincinnati Children's Hospital, Department of Pediatrics:  
168, 256, 674

Cincinnati Children's Hospital, Department of Pediatrics,  
168, 256, 674

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Standard -      HTML      All keywords associated with      [View a](#)

### Export Standard Keyword Index: Options

This export has no formatting options.

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

### Export Standard Category Index: Options

- Delimiter: Select a format for the display of the Category and Final ID. The delimiter can be a space, a dash, a colon, or a comma.

<input checked="" type="radio"/>	Standard - Category Index	HTML	<a href="#">View a Sample</a>
Delimiter option between Category and final ID			
<input checked="" type="radio"/>	Diabetes 1, 56, 89		
<input type="radio"/>	Diabetes - 1, 56, 89		
<input type="radio"/>	Diabetes: 1, 56, 89		
<input type="radio"/>	Diabetes, 1, 56, 89		

Select **Save** and then confirm the export by clicking **Yes**. Status of the exports will appear on the main summary page.

### Export Standard Session Proposal Report: Options

The export output will be in a .csv file. Please note, you may not have session proposals configured for your site. This export has no formatting options.

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

### Export Standard eCommerce Report: Options

This report is available for societies that use eCommerce on their site. The output of the export is a csv. file.

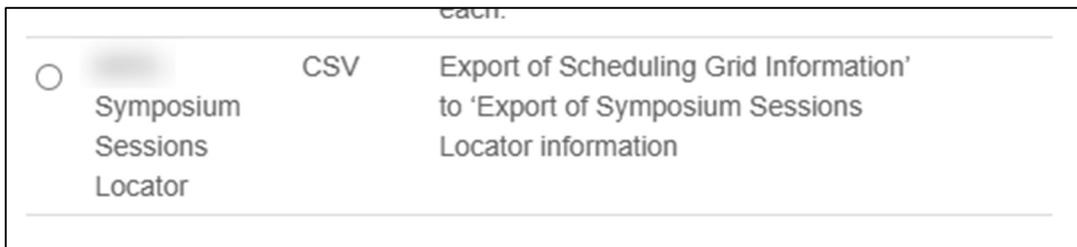
- Choose between All Transactions or Successful Transactions.

<input checked="" type="radio"/>	Standard - eCommerce Report	CSV	Includes the ability to run on all transactions or only successful transactions	<a href="#">View a Sample</a>
Report options				
<input checked="" type="radio"/>	Successful Transactions			
<input type="radio"/>	All Transactions			

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

## DOWNLOADING CUSTOM EXPORTS

In addition to the standard export formats, you may choose to contract for custom meeting deliverables that ScholarOne can create specifically for your society. When complete, these exports provide you with any time-access, allowing you to generate these custom exports and re-run them any time you need an updated file.



	CSV	Export of Scheduling Grid Information' to 'Export of Symposium Sessions Locator information
<input type="radio"/>	Symposium Sessions Locator	

## IMPORTANT EXPORT TOOL INFORMATION

Please note the following key points:

- Depending on the amount of data, it may take several hours to process and spoil your export.
- You must refresh the **Data Export** screen to see changes in export status (simply click **Data Export** on the left menu to do this).
- Exports are running against a copy of the site, so they will not affect site performance.
- The name of your export when completed will be in the following format: <export name><site short name><date><time>. This will make for easy identification of exports when several are running.

EXPORT NAME	EXPORT DATA	DELIVERY METHOD	DATE / TIME RUN	RUN BY	STATUS
Fall_2018	Abstracts	Download	04-Oct-2018, 07:26 AM	Molter, Sven	Completed Fall_2018_pmdemo_04-Oct-2018-07-26-05.zip

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

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