

ScholarOne Abstracts

# Session Administrator Guide

18-October-2018

## TABLE OF CONTENTS

Select an item in the table of contents to go to that topic in the document.

|   |    |
|---|----|
| USE GET HELP NOW AND FAQs .....             | 1  |
| OVERVIEW OF THE SESSION CENTER .....        | 1  |
| ACCESSING THE SESSION CENTER .....          | 2  |
| THE DASHBOARD .....                         | 3  |
| SETUP A MEETING .....                       | 4  |
| Programs.....                               | 4  |
| Create Rooms .....                          | 6  |
| Room Availability .....                     | 8  |
| Types.....                                  | 9  |
| Topics (Tracks) .....                       | 11 |
| Hosts .....                                 | 14 |
| Email Potential Host .....                  | 15 |
| Track and Limit Host Assignments .....      | 16 |
| Import Hosts .....                          | 17 |
| Roles .....                                 | 19 |
| SESSIONS & EVENTS.....                      | 21 |
| Accessing Sessioning .....                  | 21 |
| Create/Edit/Delete Sessions & Events.....   | 21 |
| Session Owners .....                        | 23 |
| Sessioning Next Steps .....                 | 27 |
| Add/Edit Hosts .....                        | 27 |
| Create Host Account On the Fly.....         | 29 |
| Add Abstracts to Sessions .....             | 32 |
| Add Placeholder to a Session .....          | 34 |
| Set Durations .....                         | 34 |
| Using the Mass Update Tab .....             | 34 |
| Using Controlled by Presentation Type ..... | 36 |
| Adjust Duration .....                       | 38 |
| Assigning IDs .....                         | 38 |
| Session Imports .....                       | 41 |

|  |    |
|--|----|
| Import Session and Events.....                 | 41 |
| Import Final ID/DOI.....                       | 43 |
| Import Abstracts.....                          | 44 |
| Changing Column Headers and Resources .....    | 46 |
| Session Exports .....                          | 47 |
| Finalize Sessions for Speaker Management ..... | 47 |
| CUSTOMIZE THE SESSION AND EVENTS GRID .....    | 47 |
| Add and Remove Grid Columns .....              | 48 |
| Rearrange Columns .....                        | 48 |
| Sort Grid Data .....                           | 49 |
| Saving Views.....                              | 50 |
| Search Grid Data .....                         | 51 |
| Edit Session or Event Information.....         | 52 |
| Edit in New Window.....                        | 52 |
| Edit In-Line.....                              | 53 |
| Edit Link .....                                | 54 |
| View Full Screen .....                         | 54 |
| Delete/Print Grid Data .....                   | 54 |
| SESSION BUILDER .....                          | 56 |
| Assign Abstracts Toggle View .....             | 56 |
| Assign Hosts Toggle View .....                 | 59 |
| SCHEDULING SESSIONS & EVENTS.....              | 61 |
| Grid Scheduler .....                           | 61 |
| Room Views.....                                | 64 |
| The Session Information Tab.....               | 65 |
| ABSTRACTS GRID .....                           | 66 |
| REPORTS .....                                  | 68 |
| Participant Conflict Report .....              | 68 |
| Session Event Report .....                     | 69 |

## USE GET HELP NOW AND FAQs

As a ScholarOne Abstracts Admin, one of your greatest help tools is ScholarOne's Frequently Asked Questions tab on our help site, [Get Help Now](#). Our **FAQs** provide immediate answers to common user questions.

In addition, Get Help Now offers downloadable guides (such as this one), video tutorials, and the ability to **Submit a Question/Create a Case** to get assistance from our Customer Support Team. You can also submit suggestions on how you think we can enhance the system through the **Make Suggestion** tab. We recommend that you bookmark our help site and visit often.

### GET HELP NOW

**TRAINING:**

- Author
- Reviewer/Decisioner
- Sessioner
- Administrator

**RELEASE NOTES**

**SUPPORT ALERTS**



**Contact SCHOLARONE Customer Care**

Monday 12:00am ET  
until Friday 8:30pm ET

+1 434 964 4100 (US)  
+1 888 503 1050 (US toll free)

+44 800 328 8044 (UK)  
0800 328 8044 (UK toll free)

ts.acsupport@clarivate.com

Chat with a Support Expert

For Administrators of *ScholarOne Abstracts* sites, we offer downloadable guides, video tutorials, and relevant FAQs for your training needs. In addition, you can submit a question/create a case, view your cases, or make a suggestion using the Support portal below.

---

**ADMINISTRATOR TRAINING**

Attend our instructor-led ScholarOne Abstracts Administrator training courses.

These courses are designed to coordinate with the three major phases in the meeting process in ScholarOne Abstracts. For the greatest effectiveness, we recommend you attend the individual courses at the start of the coordinating phase of the meeting cycle.

- Administrator Basics
- Reviewer Admin Basics
- Session Admin Basics
- Speaker Management Basics

Pre-requisite: You **MUST** attend Session Admin Basics before attending Speaker Management Basics.

Register

**ADMINISTRATOR GUIDES**

- [Administrator Guide](#) PDF July 2018
- [Reviewer Admin Guide](#) PDF April 2018
- [Session Center Admin Guide](#) PDF June 2018
- [Speaker Management Admin Guide](#) PDF May 2018
- [Session Proposal Admin Guide](#) PDF May 2017
- [Data Export Tool Guide](#) PDF May 2018
- [The Planner](#) PDF August 2018
- [Glossary of Terms](#) PDF August 2017

**ADMINISTRATOR VIDEO TUTORIALS**

- [Speaker Management Tutorial \(19:23\)](#) August 2017

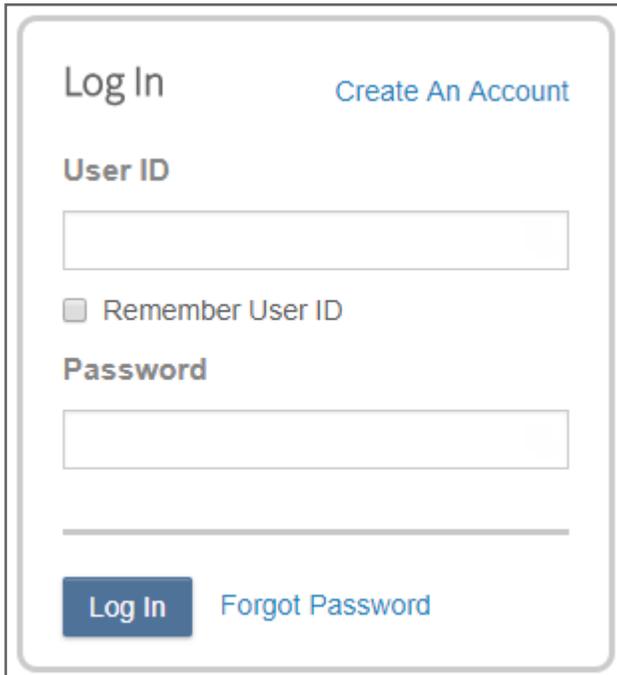


## OVERVIEW OF THE SESSION CENTER

The ScholarOne Abstracts Session Center uses a set of cutting-edge Web 2.0 tools designed for usability, flexibility, and performance when managing the sessioning process for meetings.

## ACCESSING THE SESSION CENTER

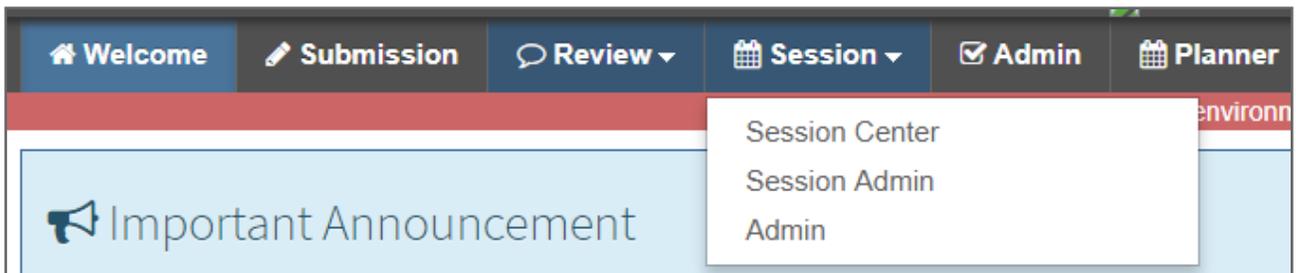
On the ScholarOne Abstracts homepage, log in using your ScholarOne Abstracts **User ID** and **Password**. Click the **Log In** button.



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
- Remember User ID
- Password** label above a text input field
- (button) and [Forgot Password](#) (link)

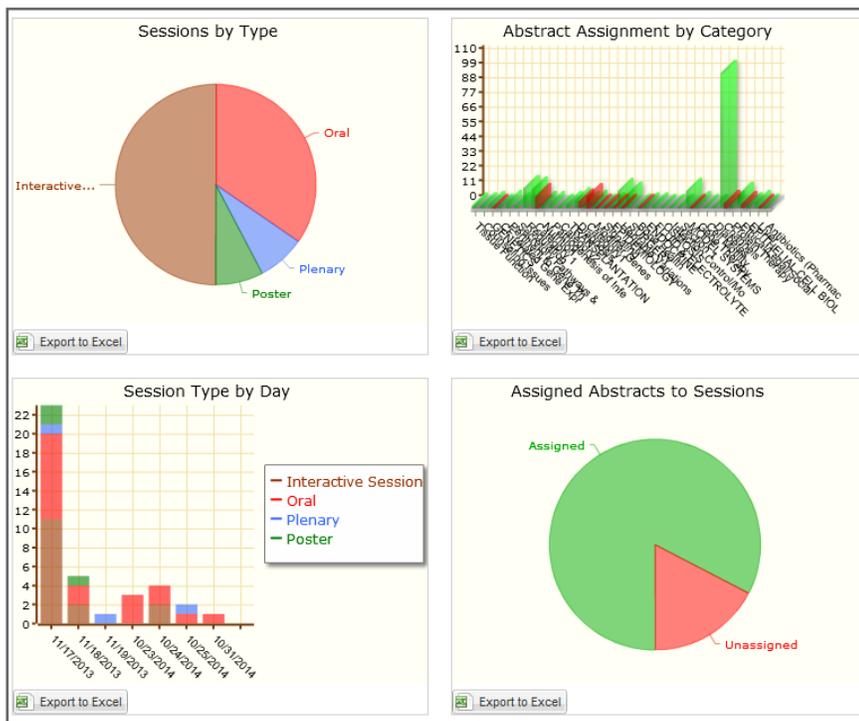
Select the **Session** tab at the top of your Welcome Screen. If you have more than one session center role, choose which role you want to access in the dropdown.



## THE DASHBOARD

The Session Center **Dashboard** is designed to give you a quick view of the overall progress and status of your sessioning process. The dashboard is comprised of five configurable charts that summarize and display key session aspects. You may choose up to four to display.

- **Sessions by Type** displays the relative proportion of each type of session present in the meeting.
- **Abstract Assignment by Category** displays the number of abstracts assigned in their designated category.
- **Session Type by Day** displays a view of the sessions scheduled for an individual day of the conference.
- **Assigned Abstracts to Sessions** displays the relative proportion of all abstracts currently assigned or unassigned.
- **Invitation Status** (not shown) displays the number of invitations in each status, including declined, accepted, and no response. This chart is available for sites where Speaker Management is used.



To set-up the Dashboard, select **Set Preferences**. You will select the four of five charts to display. Order the charts by selecting the dropdown orders.

**Set Chart Preferences**

The available charts for display are listed below. Choose "1" in the dropdown to make a chart display first on the page, or choose "Off" to prevent a chart from displaying. No more than 4 charts may be configured to display on a page at one time.

[EDIT INSTRUCTIONS]

Sessions by Type:

Invitation Status:

Abstract Assignment by Category:

Session Type by Day:

Assigned Abstracts to Sessions:

## SETUP A MEETING

### PROGRAMS

The first step to building your meeting is to create a program into which you will then place and arrange sessions according to your schedule. To do this, navigate to the **Programs** link under **Meeting Setup** in the Session Center's left menu. Selecting the Programs link will open the Programs grid. Click the **Create Program** button and fill in the required fields as noted by red asterisks.

[EDIT INSTRUCTIONS]

**Programs**

Select One... Save/Edit | Delete Search: Found In: All Columns Clear Search

| Program ID | Program Name           | Start Date     | End Date       |
|------------|------------------------|----------------|----------------|
| 3129       | Annual Meeting Program | Fri 10/14/2016 | Mon 10/17/2016 |

---

**Note:** In some cases, a default program may already be started for you.

---

The **Program Start and End Dates** are the days over which the meeting is occurring. **Daily Start Time** is the earliest starting time throughout the whole program. For example, if Saturday begins at 6 a.m. and every other day begins at 7 a.m., then this field would need to be set to 6 a.m. Similarly, **Daily End Time** is the last possible time a session will end during the program.

The screenshot shows the 'Create Program' window with two tabs: 'Information' (selected) and 'Add/Edit Rooms'. The 'Information' tab contains the following content:

**Instructions**

**CREATE PROGRAM**  
Create the program shell by naming the program, inputting the days of the annual meeting, as well as the earliest possible start time and the latest possible end time for any day of the meeting. Save when done, and be sure to add rooms for this program before you begin scheduling sessions by clicking the Add/Edit Rooms tab at the top of this page.

*Program Title* - This is the name of the Annual Meeting.

*Start Date and End Date* - Use the pop-up calendar to enter the first and last of the Annual Meeting.

*Daily Start and End Times* - The system uses these times to determine the available time slots for each day of the Meeting. For example, if the earliest session for any day of your meetings starts at 7AM, then the daily Start Time should be set to 7AM.

*Time Interval* - This refers to the time interval used on the Programming Grid. If all your sessions begin and end on a certain time interval (15 min for example) then use that time interval for the programming grid. It's best to use common intervals (30 min, 15 min, 5 min), although the system will accept others.

[EDIT INSTRUCTIONS]

Program Creator: [Text Field]

\* Program Title: [Text Field: Fall 2018]

\* Start Date: [Text Field: Wed 8/01/2018]

\* End Date: [Text Field: Mon 12/31/2018]

Program Owner(s): [Text Field]

[Add Owners]

\* Daily Start Time: [Text Field: 7:00 AM]

\* Daily End Time: [Text Field: 7:15 PM]

\* Time Interval: [Text Field: 15]

[Show Special Characters]

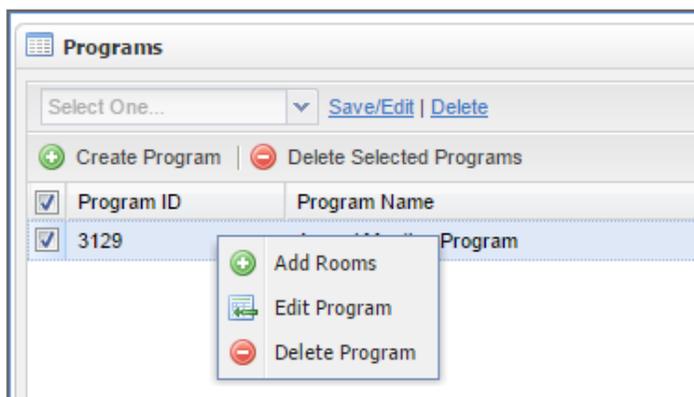
[Save] [Close]

The time interval selected when you create the program will affect all session schedules in your program. For example, in the Schedule Sessions screenshot below, Time Interval is set at 15 minutes. This means all sessions will have 15-minute intervals available for scheduling. Set your interval to the smallest interval based on the durations of your sessions and events.

| Filters                     |         | Albemarle Room   |
|-----------------------------|---------|--|
| Title: <input type="text"/> | 7:00 AM |  |
| Type: >>                    | 7:15 AM |  |
| Topic: >>                   | 7:30 AM |  |
| Sessions                    | 7:45 AM |  |
| Clinical 30                 | 8:00 AM |  |
| Clinical Session #1         | 8:15 AM | 8:15 AM - 9:30 AM<br>Clinical Session 25;<br>Clinical Session; Host<br>Names: Host, Christina<br>(Moderator) |
| Oral Example                | 8:30 AM |  |
|                             | 8:45 AM |  |
|                             | 9:00 AM |  |
|                             | 9:15 AM |  |

## CREATE ROOMS

Once you have created a Program, it is time to add the rooms that will house the sessions. To do this, double-click on the **Program Name** and go to the **Add/Edit Rooms** tab or right-click on the program name and choose **Add Rooms** from the menu list.



In the **Add/Edit Rooms** section, add a room by entering the room name and availability, and clicking **Save**. You can set the availability for a room by checking the desired days, choosing the Start and End times, and clicking the **Add Times** button.

**Instructions**  
**ADD/EDIT ROOMS**  
 Enter the necessary information about each room in the space below. Be sure to press Save when done. To edit an existing room, double-click on the room in the grid. Any existing configured availability will appear immediately above the Save button, click "REMOVE" to delete a block of availability or add new availability by selecting new preferences in the Availability section on the right and pressing Save.

*Add Availability* - Check the boxes for each day the room should be available during the annual meeting, and then select the blocks of time the room should be available for each day. To update the list of available dates or start/end times, the click the "Information" tab in the top left of this grid.

[EDIT INSTRUCTIONS]

\* Room Name:

Building/Venue:

Room Notes:

Max Capacity:

Multiple Sessions:

**Add Availability:**

Fri 10/14/2016  
 Sat 10/15/2016  
 Sun 10/16/2016  
 Mon 10/17/2016

Start Time:

End Time:

Previously created rooms are visible in the Current Rooms section.

**Current Rooms**

|   | Room Name          | Building/Venue | Currently Configured Availability                                      |
|---|--------------------|----------------|--|
| 1 | Albemarle Room     |                | Saturday 10/15/2016 7:00 AM - 7:00 PM; Friday 10/14/2016 7:00 AM - ... |
| 2 | Ashlawn Room       |                | Friday 10/14/2016 7:00 AM - 7:00 PM                                    |
| 3 | Barboursville Room |                | Friday 10/14/2016 7:00 AM - 7:00 PM; Saturday 10/15/2016 7:00 AM - ... |
| 4 | Blue Ridge Room    |                | Friday 10/14/2016 7:00 AM - 7:00 PM; Saturday 10/15/2016 7:00 AM - ... |
| 5 | Buckingham Room    |                | Friday 10/14/2016 7:00 AM - 7:00 PM; Saturday 10/15/2016 7:00 AM - ... |
| 6 | Crozet Room        |                |  |

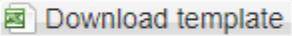
You can also import rooms using the **Import** function noted above. Click on **Import** and then download the template. The template downloads a .csv file that opens in Excel. Fill in your template and save it as a .csv file. Browse to your completed template and click **Import**.

### Import Rooms

**Instructions**

To import rooms, click the "Download Template" button below and enter your room information in the Sessions" field only accepts "Y" or "N" characters, and is used to determine if the system should allow

[EDIT INSTRUCTIONS]

 Download template

Please upload your

Friday 10/14/2016 7:00 AM - 7:00 PM; Saturday 1

## Room Availability

Room times can be edited using **Room Availability** under **Meeting Setup**. You can edit room availability or add availability to one or more rooms.

### Room Availability

Annual Meeting Program

Multiple Assign
Unassign

#### Rooms

Select One... Save/Edit | Delete Clear Search

Add Room |  Delete Room

|                                     | Room Name          | Building/Venue |
|-------------------------------------|--------------------|----------------|
| <input checked="" type="checkbox"/> | Albemarle Room     |                |
| <input checked="" type="checkbox"/> | Ashlawn Room       |                |
| <input checked="" type="checkbox"/> | Barboursville Room |                |
| <input checked="" type="checkbox"/> | Blue Ridge Room    |                |
| <input checked="" type="checkbox"/> | Buckingham Room    |                |

#### Room Availability

Select One... Save/Edit | Delete Clear Search

Add Availability |  Delete Availability

|                                     | Day/Date       | Start Time | End Time |
|-------------------------------------|----------------|------------|----------|
| <input checked="" type="checkbox"/> | Fri, 14 Oct 16 | 7:00AM     | 7:00PM   |
| <input checked="" type="checkbox"/> | Sat, 15 Oct 16 | 7:00AM     | 7:00PM   |
| <input checked="" type="checkbox"/> | Sun, 16 Oct 16 | 7:00AM     | 7:00PM   |
| <input checked="" type="checkbox"/> | Mon, 17 Oct 16 | 7:00AM     | 7:00PM   |

Select the room you wish to edit and then select the appropriate start and end times. Click **Save** to complete the updates.

To add an availability, click **Add Availability**. Fill in the required fields: Date, Start time, and End time. You can then apply the availability to all rooms or a set of rooms using **Multiple Assign**.

**Room Availability**

Select One... Save/Edit | Delete Clear Search

+ Add Availability | - Delete Availability

| Day/Date       | Start Time | End Time |
|----------------|------------|----------|
| Sat, 15 Oct 16 | 8:00AM     | 9:00AM   |
| Fri, 14 Oct 16 |            | 7:00PM   |
| Sat, 15 Oct 16 |            | 7:00PM   |
| Sun, 16 Oct 16 | 7:00AM     | 7:00PM   |
| Mon, 17 Oct 16 | 7:00AM     | 7:00PM   |

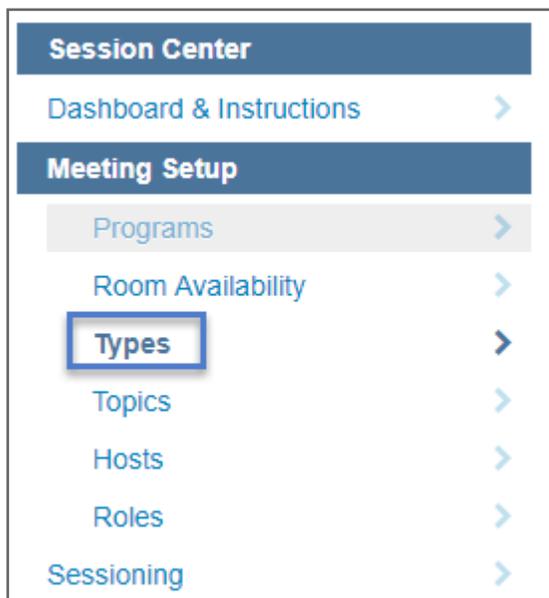
Cancel Save

## TYPES

Once you have created your Program and added rooms, you will need to set the framework for the sessions and events you will add later. The selection and creation of **Types** is a crucial element of organizing your meeting. This allows you to classify every session and event into a type that will make your Program's Itinerary (if configured) easy to navigate for your attendees.

Session types are those sessions that contain abstracts. Events are sessions that do not contain abstracts (coffee breaks or lunches, for example).

Under the **Meeting Setup** option on the left menu, select **Types**.



You **Add** or **Delete** types at your discretion by utilizing the buttons along the top of the window. You may also right-click individual types to edit or delete based on the needs of your meeting.

The types you create will become the **Type** dropdown selections when you create a new session or event. Note if any changes are made to these types from year to year you will want to communicate this to your Client Implementation Manager.

**Add New Type**

**Instructions**  
Add the session type name (e.g. "Poster Session"), a description for it (if necessary), choose a color (can be used in the Schedule Sessions Grid) and indicate if the type is for use in a Session or an Event. All required fields are indicated with a red asterisk.

[EDIT INSTRUCTIONS]

\* Type Name:

Description:

Color:

\* Type:  Session  Event

Pick

You may choose a color for each session or event type. The colors will appear in the **Scheduling** grid and will make it easy to visually organize your **Program**.

\* Type Name:

Description:

Color:

\* Type:  Session  Event

Min number of abstracts allowed:

Max number of abstracts allowed:

Default Session duration:

Pick

multiple sessions?

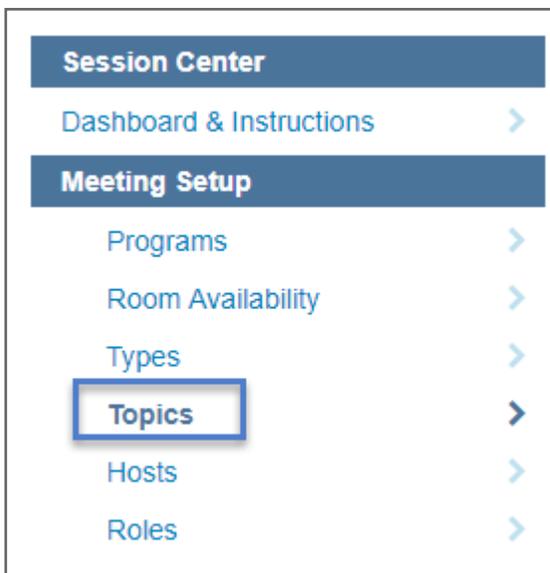
You can also create custom question on all session types or for certain session types. The custom questions can be configured by your Client Implementation Manager. You can make these questions required for a session type or not required.

| Session Detail Type: |                         | Add Session Detail Type                       |        |
|----------------------|-------------------------|---|--------|
| 1                    | Previous Attendance     | <input checked="" type="checkbox"/> Required? | remove |
| 2                    | Available for CE Credit | <input checked="" type="checkbox"/> Required? | remove |

Save and Add Another | Save and Close | Close

## TOPICS (TRACKS)

If your site uses Topics, create the topics for your meeting by navigating to **Topics** under the **Meeting Setup** menu on the left side of your screen. Topics are a higher level of categorization than types. Often a Topic will encompass several types.



The **Current Topics** toolbar gives you the options to **Add**, **Delete**, **Export**, or **Import** topics. You may also right-click individual topics to edit or delete based on the needs of your meeting. Select a color if you wish to color code your topics for easy visual tracking on the **Scheduling** grid.

| Topics  |         |         |
|---|---------|---------|
| Topic Name                                      | Type    | Color   |
| <input type="checkbox"/> Clinical Trials        | Session | #66FFFF |
| <input type="checkbox"/> Genetics of Cancer     | Session | #FFCC33 |
| <input type="checkbox"/> Immunotherapy          | Session | #66FFCC |
| <input type="checkbox"/> Medical Administration | Session | #FF6600 |
| <input type="checkbox"/> No Topics              | Event   | #FF00FF |
| <input type="checkbox"/> Scientific Trials      | Session | #CC99FF |

Topic Owners can be added. Select **Add Owners** from the **Edit Topic Screen**.

**Instructions**

Add the session topic name (e.g. "Poster Session"), a description for it (if necessary), choose a color (can be used in the Schedule Sessions Grid) and indicate if the topic is for use in a Session or an Event. All required fields are indicated with a red asterisk.

[EDIT INSTRUCTIONS]

\* Topic Name:

Description:

Color:

\* Type:  Session  Event

Topic Owner(s): Smith, Alex, Clarivate Analytics

Search for the Topic Owner's name in the **Search Criteria** field and click on **Add Selected** in the **Search Results**. The host moves to the Current Hosts grid. You can add more than one host.

**Topic Owners**

[EDIT INSTRUCTIONS]

**Current Owners**

Remove Selected

| First Name | Last Name | Institution | Email Address | Role |
|------------|-----------|-------------|---------------|------|
|            |           |             |               |      |

**Search Criteria**

First Name:  Last Name:

Institution:  Email Address:

**Search Results**

Add Selected

| <input type="checkbox"/> | First Name | Last Name | Institution         | Email Address          |
|--------------------------|------------|-----------|---------------------|------------------------|
| <input type="checkbox"/> | Alex       | Smith     | Clarivate Analytics | alex0623@donotsend.... |

The last step is to select the **Topic Owner's** role. Topic Owner roles are configured under **Meeting Setup/Roles**. We will cover this in the next section of **Meeting Setup**.

|   | First Name | Last Name | Institution         | Email Address          | Role   |
|---|------------|-----------|---------------------|------------------------|--|
| 1 | Alex       | Smith     | Clarivate Analytics | alex0623@donotsend.com | <ul style="list-style-type: none"> <li>Co-chair</li> <li>Lecturer</li> <li>Moderator</li> <li>Panel Leader</li> <li>Event Chair</li> </ul> |

**Search Criteria**

First Name:

Last Name:

Institution:

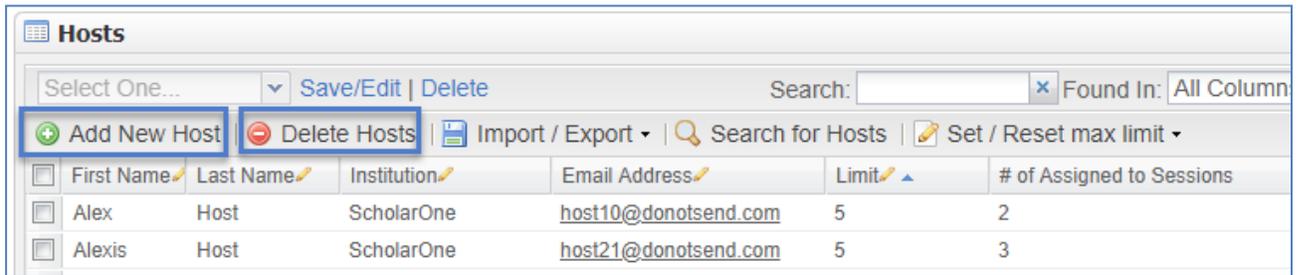
Email Address:

## HOSTS

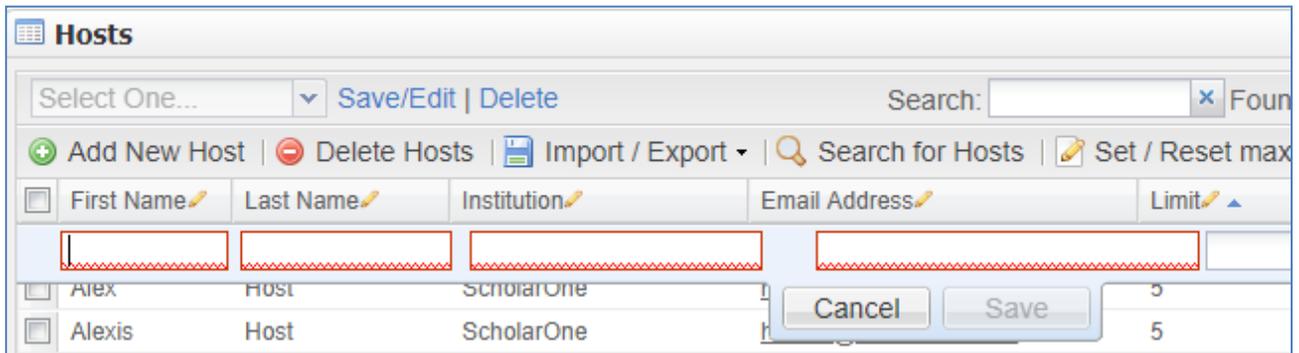
In addition to Rooms, Types, and Topics, you'll need to create a pool of hosts to choose from when you create your Sessions and Events. Under the **Meeting Setup** option on the side bar, select **Hosts**.

- Session Center**
- Dashboard & Instructions >
- Meeting Setup**
- Programs >
- Room Availability >
- Types >
- Topics >
- Hosts** >
- Roles >

You may **Add** or **Delete** Hosts by utilizing the buttons along the top of the window.



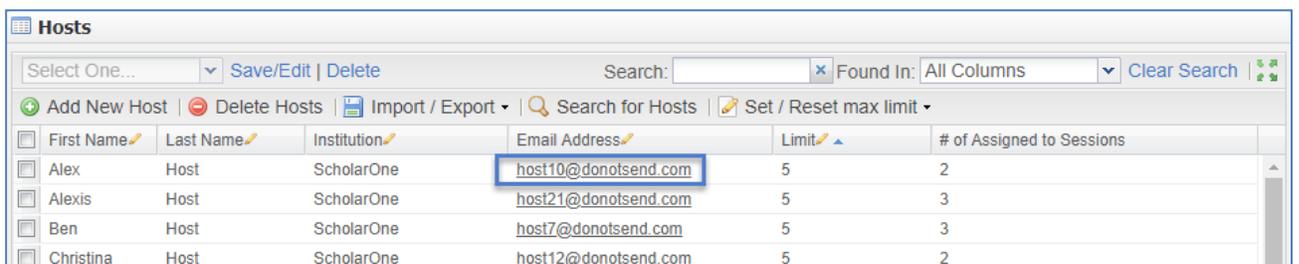
First name, Last name, Institution and Email address are all required fields for adding a host.



You may also double click individual Hosts to edit or delete based on the needs of your meeting and how your site is configured.

## Email Potential Host

You can email a potential host from the **Available Host** list by clicking on the hyperlinked **Email Address** in the grid.



Clicking on the host email address will bring up an email template for you to complete. Click **Send** when you have completed your template updates. If you would like to pre-load text into this email template, the template can be configured under **Admin > Email Administration > System emails**.

The screenshot shows a 'Send Email' dialog box with the following fields and content:

- To:** ackerman@wustl.edu
- From:** abstracts@abc.org
- CC:** (empty)
- BCC:** (empty)
- Subject:** Host Notification
- Body:** (empty text area)

At the bottom of the dialog, there is a status bar with the text 'Debraj Singh M.Sc Kyungpook Nat... debraisingh2' and two buttons: 'Send' and 'Cancel'.

## Track and Limit Host Assignments

To assist Sessioners and Administrators in providing varied host assignments, the **# of Assigned to Session** column appears on the host grid. You may also set a maximum number of sessions for any Host by double-clicking the **Limit** cell for that host, entering a value, and selecting **Save**.

The screenshot shows the 'Hosts' management interface. At the top, there are navigation buttons: 'Add New Host', 'Delete Hosts', 'Import / Export', 'Search for Hosts', and 'Set / Reset max limit'. Below this is a table with columns: First Name, Last Name, Institution, Email Address, Limit, and # of Assigned to Sessions. The table contains three rows: Alex (Host, ScholarOne, host10@donotsend.com, Limit: 5, Sessions: 2), Alexis (Host, ScholarOne, host12@donotsend.com, Limit: 5, Sessions: 3), and Ben (Host, ScholarOne, host7@donotsend.com, Limit: 5, Sessions: 3). A modal form is open over the table, allowing editing of the selected host's information. The 'Limit' field in the modal is highlighted with a blue box and contains the value '5'. There are 'Cancel' and 'Save' buttons at the bottom of the modal.

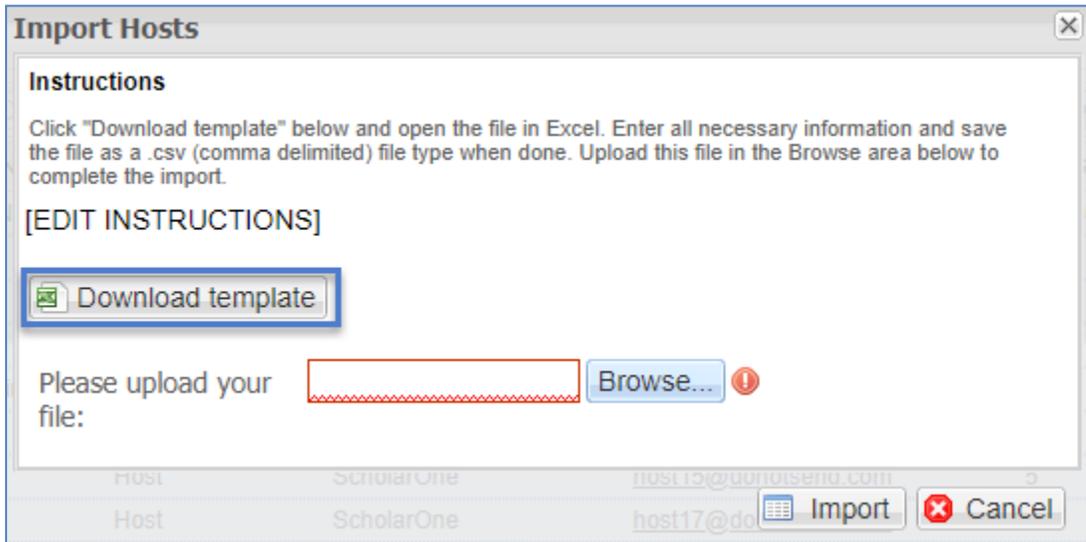
To set limits for multiple hosts, check the box beside the hosts' first names and click **Set/Reset Max Limit**. Enter a limit value and select **OK**.

The screenshot shows the 'Hosts' management interface with a list of hosts. The table has columns: First Name, Last Name, Institution, Email Address, Limit, and # of Assigned to Sessions. All rows have checkboxes checked in the first column. The 'Set / Reset max limit' button is highlighted with a blue box. The table data is as follows:

| First Name                          | Last Name | Institution | Email Address | Limit                | # of Assigned to Sessions |   |
|-------------------------------------|-----------|-------------|---------------|----------------------|---------------------------|---|
| <input checked="" type="checkbox"/> | Alex      | Host        | ScholarOne    | host10@donotsend.com | 5                         | 2 |
| <input checked="" type="checkbox"/> | Alexis    | Host        | ScholarOne    | host21@donotsend.com | 5                         | 3 |
| <input checked="" type="checkbox"/> | Ben       | Host        | ScholarOne    | host7@donotsend.com  | 5                         | 3 |
| <input checked="" type="checkbox"/> | Christina | Host        | ScholarOne    | host12@donotsend.com | 5                         | 2 |
| <input checked="" type="checkbox"/> | David     | Host        | ScholarOne    | s1ahost5@gmail.com   | 5                         | 1 |
| <input checked="" type="checkbox"/> | Elsie     | Host        | ScholarOne    | host15@donotsend.com | 5                         | 2 |
| <input checked="" type="checkbox"/> | Emily     | Host        | ScholarOne    | host17@donotsend.com | 5                         | 0 |

## Import Hosts

You may import hosts or update host information in the system through an upload. Select the **Import/Export** button then **Import Hosts**. Select the **Download Template** button to download the Hosts template file.



Enter data for each host to import into a separate line in the template. The **Person ID** must match a valid **Person ID** in the system to make an existing user a host. If the **Person ID** field is blank, a new account will be created on the site for that person. To obtain a spreadsheet that includes person IDs, contact your Client Implementation Manager.

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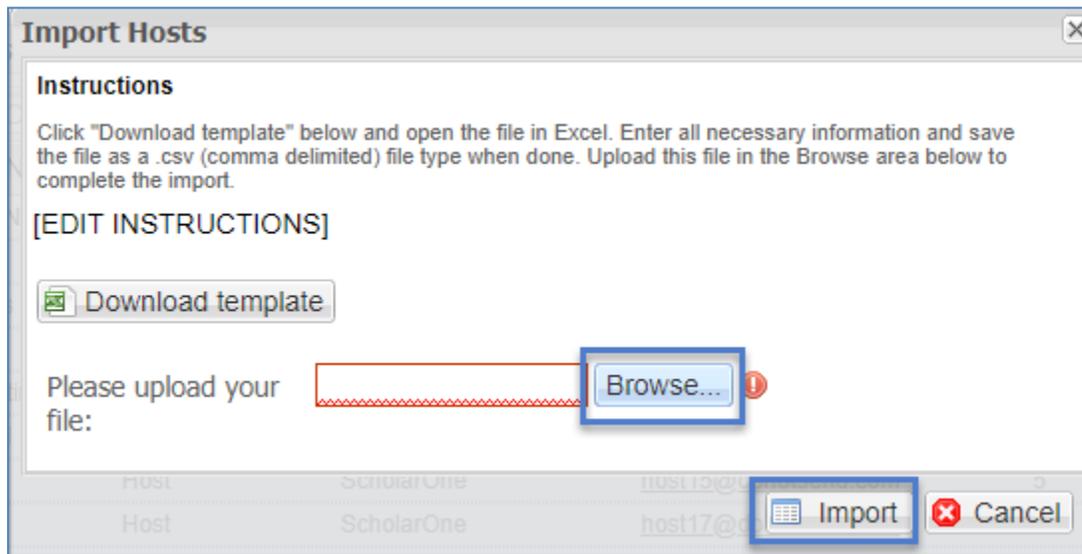
**Note:** First Name, Last Name, Institution, and Email Address are required fields.

---

|   | A          | B           | C         | D      | E      | F           | G          | H        | I        | J    | K       | L     | M   | N     | O         | P     | Q         |
|---|------------|-------------|-----------|--------|--------|-------------|------------|----------|----------|------|---------|-------|-----|-------|-----------|-------|-----------|
| 1 | First Name | Middle Name | Last Name | Suffix | Degree | Institution | Department | Address1 | Address2 | City | Country | State | Zip | Phone | Email Add | Limit | Person ID |
| 2 |            |             |           |        |        |             |            |          |          |      |         |       |     |       |           |       |           |
| 3 |            |             |           |        |        |             |            |          |          |      |         |       |     |       |           |       |           |

Save the completed template as a .csv file.

Select the **Import/Export** button then **Import Hosts** again. Browse to your file and click **Import**.

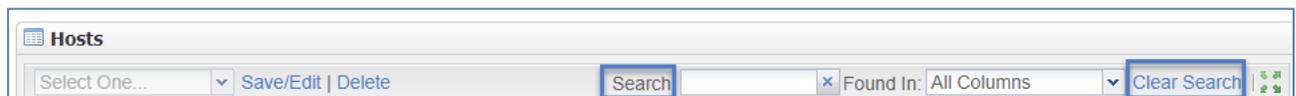


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**Note:** To export the host data, select **Export** to Excel from the **Import/Export** button.

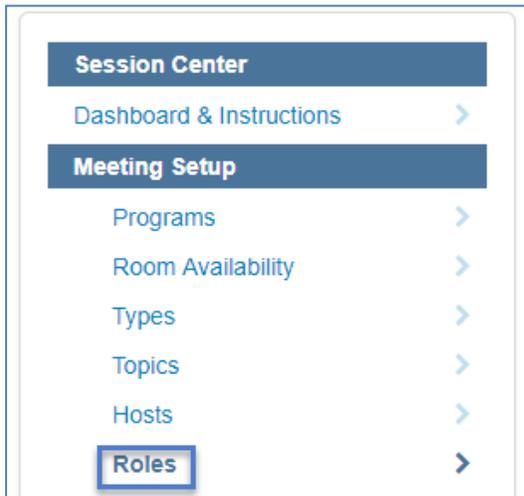
---

You can easily search for hosts by using the Search option at the top of the grid. Clear your search to return to the full list of hosts.



## ROLES

The Hosts you choose will need to have assigned Roles in the Sessions and Events grid. Use the **Roles** option under the **Meeting Setup** on the left menu to **Add**, **Edit**, and **Delete** roles for Hosts.



**Note:** Common names for host roles are moderator, chair, panelist, and leader. You may have the same role name for a Session host and for an Event host.

The image shows a dialog box titled 'Add New Role'. It contains the following elements:

- Instructions:** Add the role name (e.g. "Moderator"), a description for it (if necessary), and select a role type. All required fields are indicated with a red asterisk.
- [EDIT INSTRUCTIONS]**
- \* Role Name:** A text input field containing the word 'Leader'.
- Description:** A larger text input field, currently empty.
- \* Type:** A group box containing two radio buttons: 'Session' (which is selected) and 'Event'.
- Is Disclosure Reviewer:** A checkbox, currently unchecked.
- Buttons:** Three buttons at the bottom: 'Save and Add Another' (highlighted with a blue box), 'Save and Close', and 'Close'.

## SESSIONS & EVENTS

Programming Sessions & Events involves several steps:

- Entering the basic information about a session or event (title, type, and session duration)
- Adding/removing abstracts to/from sessions
- Adding hosts to Session & Events
- Setting durations for session presentations

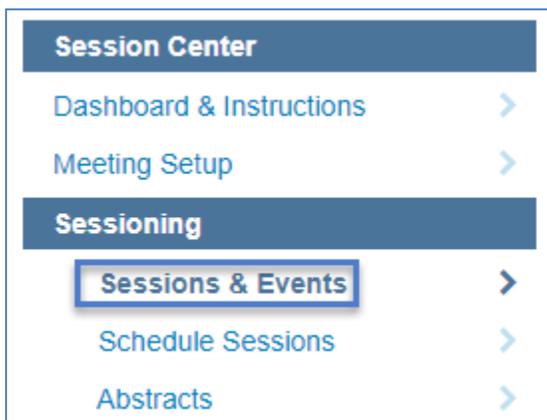
---

**Note:** Completing all steps of a session or event creation can be done in one continuous flow by moving from one creation tab to the next.

---

### ACCESSING SESSIONING

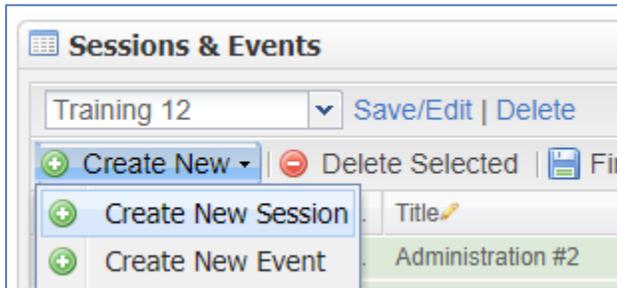
Select **Sessioning** on the left menu. Then select **Sessions & Events**. The **Sessions & Events** grid displays.



### CREATE/EDIT/DELETE SESSIONS & EVENTS

To begin, navigate to the **Sessions & Events** grid, click the **Create New** option from the grid. Choose either **Create New Session** or **Create New Event**. Sessions have

abstracts associated with them. Events do not have abstracts associated with them, for example coffee breaks or lunches that are not within a session.

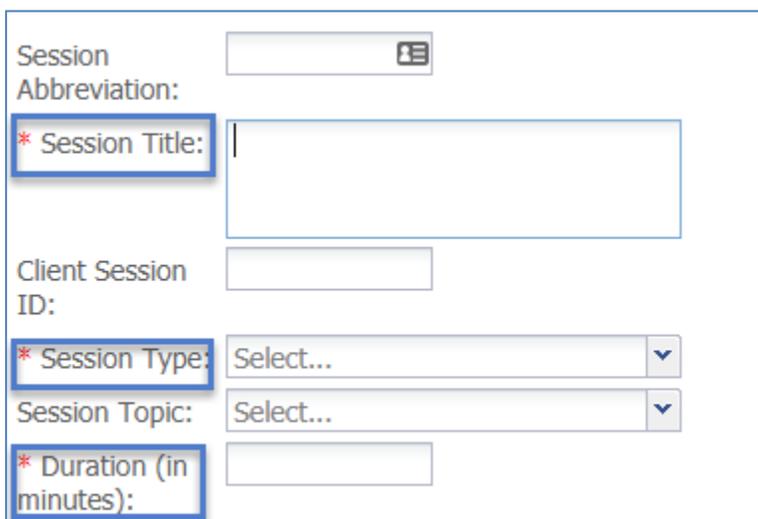


This will open the **Information** tab where you give the Session or Event a title, as well as assign additional data items such as Session Type, Topic/Track (if configured), Duration, and Session Owners (if configured). Once you have entered all the required fields, indicated by a red asterisk (\*), press the **Save** button to complete the new session or event. **Session/Event Information** is the first step in creating a session or event.

---

**Note:** Required fields such as Topic can be configured with your Client Implementation Manager. Title, Type and duration are always required fields.

---

A screenshot of a form titled "Session/Event Information". The form contains several fields: "Session Abbreviation:" with a text input and a calendar icon; "\* Session Title:" with a text input; "Client Session ID:" with a text input; "\* Session Type:" with a dropdown menu showing "Select..."; "Session Topic:" with a dropdown menu showing "Select..."; and "\* Duration (in minutes):" with a text input. The fields marked with a red asterisk are highlighted with a blue border.

## SESSION OWNERS

Some societies will have Sessioner Owners who will perform tasks on sessions. A sessioner owner is a user who can see/take action on any sessions that they own. The level of access (view only or ability to make full session changes, add hosts/abstracts and schedule) is determined by the society.

---

**Note:** For the session owner's name to appear in the Sessioner List, the Sessioner Owner must have the Sessioner Role on their account.

---

For those sites with a configured **Sessioner** role, you will want to designate the **Session Owner(s)** on the **Information** tab. Once you add the required fields (title, type, and duration), click on **Add/Edit Owners**. First search for the owner and then select them from the search results.

The screenshot displays the 'Current Owners' and 'Search Results' sections of the Session Administrator interface. The 'Current Owners' section shows a table with one entry for Grace Donovan at ScholarOne. The 'Search Criteria' section has 'Last Name' set to 'donovan'. The 'Search Results' section shows the same entry selected, with a blue box around the 'Add Selected' button. The bottom of the interface shows pagination information: Page 1 of 1, 50 Records per page, and Displaying 1 - 1 of 1.

|   | First Name | Last Name | Institution | Email Address         |
|---|------------|-----------|-------------|-----------------------|
| 1 | Grace      | Donovan   | ScholarOne  | gdovovan@donotsend... |

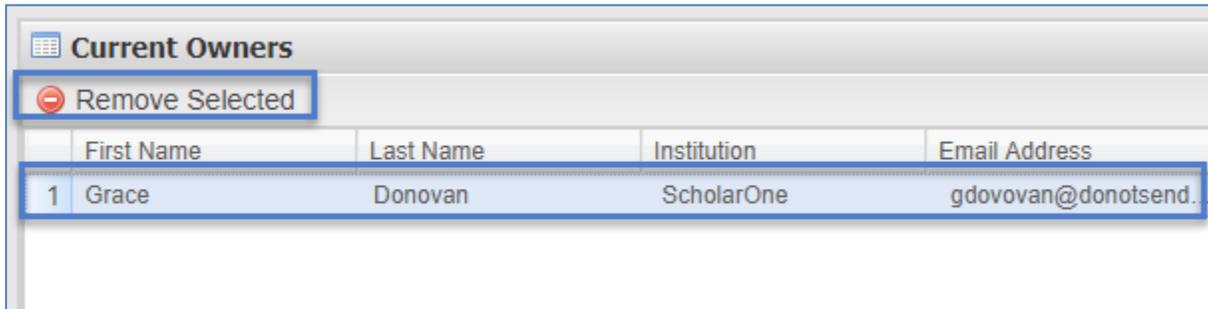
**Search Criteria**

First Name:  Last Name:   
 Institution:  Email Address:

|                                     | First Name | Last Name | Institution | Email Address         |
|-------------------------------------|------------|-----------|-------------|-----------------------|
| <input checked="" type="checkbox"/> | Grace      | Donovan   | ScholarOne  | gdovovan@donotsend... |

Page 1 of 1 | 50 Records per page | Displaying 1 - 1 of 1

To remove a Session Owner, highlight his or her name in the **Current Owners** section and click on **Remove Selected**.

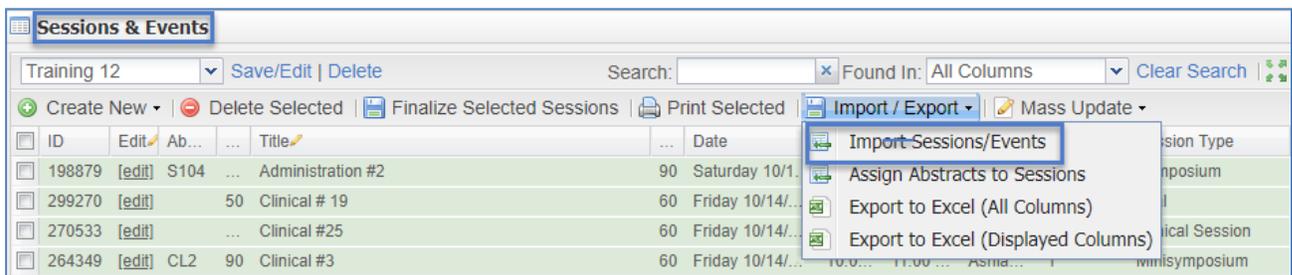


|   | First Name | Last Name | Institution | Email Address          |
|---|------------|-----------|-------------|------------------------|
| 1 | Grace      | Donovan   | ScholarOne  | gdovovan@donotsend.com |

## Importing Session Owners

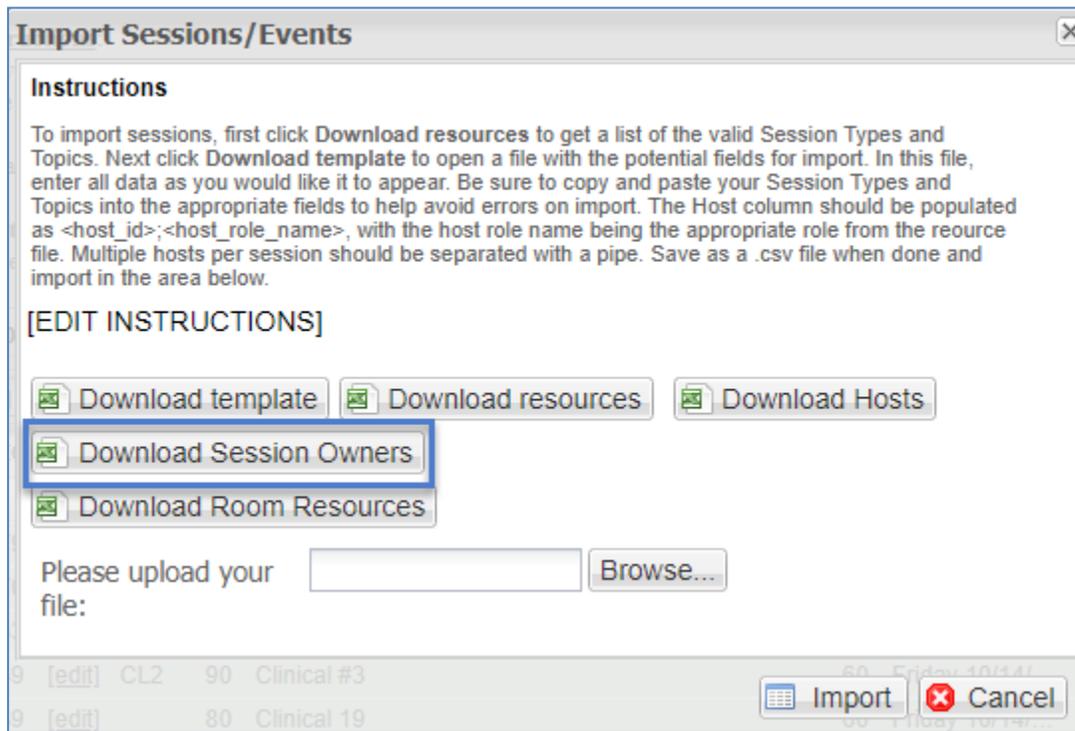
As an alternative to adding owners one by one on the session level, you may choose to import your Session Owners.

To import session owners to sessions using the import tool, go to the **Sessions & Events** grid and select the **Import/Export** option. From the dropdown, select **Import Sessions/Events**.

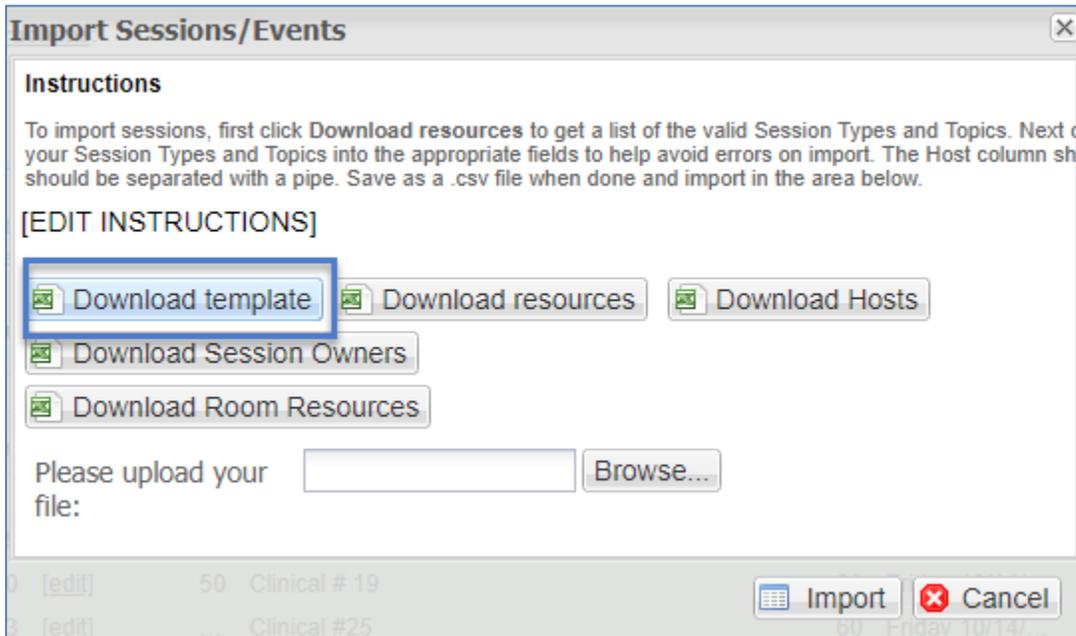


| ID     | Edit   | Ab... | Title             | Date                | Session Type     |
|--------|--------|-------|-------------------|---------------------|------------------|
| 198879 | [edit] | S104  | Administration #2 | 90 Saturday 10/1... | symposium        |
| 299270 | [edit] | 50    | Clinical # 19     | 60 Friday 10/14/... |                  |
| 270533 | [edit] | ...   | Clinical #25      | 60 Friday 10/14/... | Clinical Session |
| 264349 | [edit] | CL2   | 90 Clinical #3    | 60 Friday 10/14/... | symposium        |

To import owners, first click **Download Session Owners** to get a list of the available users who could be owners (those with a Sessioner role).

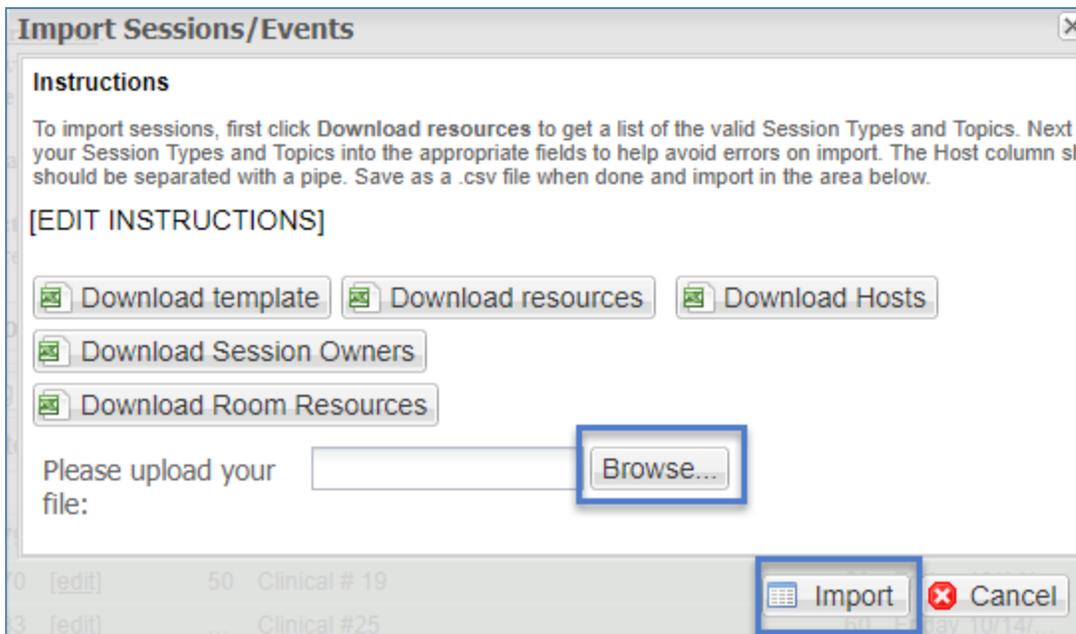


Next click **Download template** to open a file with the potential fields for import. In this file, enter all data as you would like it to appear. Owners can be populated with the <person\_id> found in the **Owner resource file**. Multiple owners per session should be separated with a pipe. Ex: 1234567|3456789



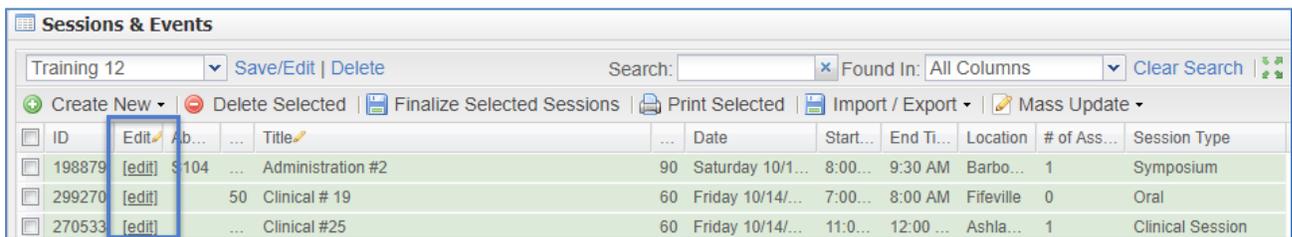
Complete the template using the person IDs in the Owner spreadsheet.

Save as a .csv file when done, browse to the file and click **Import**. Your Sessioners will then be tied to their sessions and based on their access level will be able to perform the Sessioner Owner tasks.



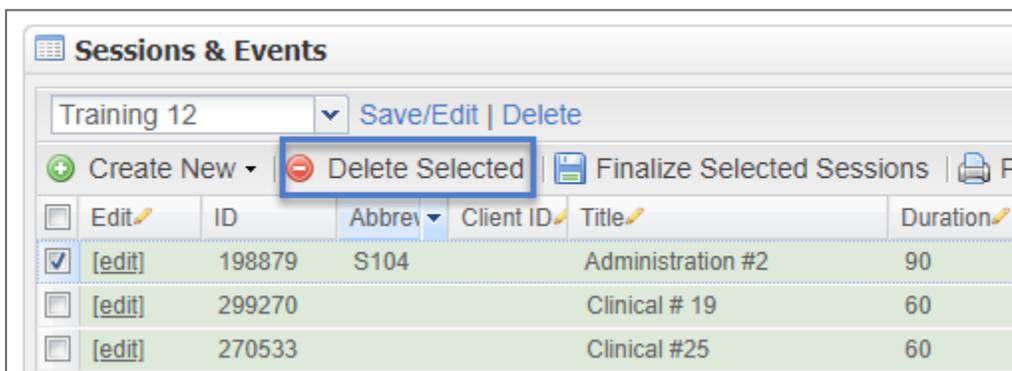
## SESSIONING NEXT STEPS

Once a session has been created, it will automatically be available in the grid. Should you want to edit the Session in any way (i.e. the title, duration, hosts, session owners, or abstracts associated with it), you may do so by finding the session in the grid and right-clicking on it. You can also easily access a session or event by clicking on the *Edit* option in the **Edit** column. This takes you immediately to the session or event's **Information** tab.



| ID     | Edit   | Ab... | Title             | Date                | Start... | End Ti... | Location  | # of Ass... | Session Type     |
|--------|--------|-------|-------------------|---------------------|----------|-----------|-----------|-------------|------------------|
| 198879 | [edit] | S104  | Administration #2 | 90 Saturday 10/1... | 8:00...  | 9:30 AM   | Barbo...  | 1           | Symposium        |
| 299270 | [edit] | 50    | Clinical # 19     | 60 Friday 10/14/... | 7:00...  | 8:00 AM   | Fifeville | 0           | Oral             |
| 270533 | [edit] | ...   | Clinical #25      | 60 Friday 10/14/... | 11:0...  | 12:00 ... | Ashla...  | 1           | Clinical Session |

Deleting a session is just like editing a session. Navigate to **Sessions & Events**, find your Session in the list, check the box next to the Title, then press the **Delete Selected** button from the action bar. If a session has abstracts tied to it, you will first need to remove the abstracts from the session before you can delete the full session.



| Edit                                       | ID     | Abbrev | Client ID | Title             | Duration |
|--|--------|--------|-----------|-------------------|----------|
| <input checked="" type="checkbox"/> [edit] | 198879 | S104   |           | Administration #2 | 90       |
| <input type="checkbox"/> [edit]            | 299270 |        |           | Clinical # 19     | 60       |
| <input type="checkbox"/> [edit]            | 270533 |        |           | Clinical #25      | 60       |

## ADD/EDIT HOSTS

Next, you will add Hosts (chairs, co-chairs, moderators, etc.) to your Sessions or Events. To do this, find your Session or Event in the grid by using the Search option. You can search on any data point, including title, type, and topic.

**Sessions & Events**

Training 12 Save/Edit | Delete Search: [ ] Found In: All Columns Clear Search

Create New | Delete Selected | Finalize Selected Sessions | Print Selected | Import / Export | Mass Update

| Edit                                       | ID     | Abbrev | Client ID | Title             | Duration | Date                | Start Time | End Time | Location    | # of Assign... | Session Type     |
|--|--------|--------|-----------|-------------------|----------|---------------------|------------|----------|-------------|----------------|------------------|
| <input checked="" type="checkbox"/> [edit] | 198879 | S104   |           | Administration #2 | 90       | Saturday 10/15/2016 | 8:00 AM    | 9:30 AM  | Barbours... | 0              | Symposium        |
| <input type="checkbox"/> [edit]            | 299270 |        |           | Clinical # 19     | 60       | Friday 10/14/2016   | 7:00 AM    | 8:00 AM  | Fifeville   | 1              | Oral             |
| <input type="checkbox"/> [edit]            | 270533 |        |           | Clinical #25      | 60       | Friday 10/14/2016   | 11:00 AM   | 12:00 PM | Ashlawn ... | 1              | Clinical Session |

Once you find the Session you want to edit, you will click on the **Edit** link on the session row. A list of available hosts will automatically populate in the **Add/Edit** screen. You can pare down the list by using the **Search Hosts** option.

**Available Hosts** Search: [ ]

Search for New Hosts

| First Name | Middle Name | Last Name | Suffix | Institution | Email Address   | Phone | Limit | # of Assigned to Sessions |
|------------|-------------|-----------|--------|-------------|-----------------|-------|-------|---------------------------|
| Alex       |             | Host      |        | ScholarOne  | host10@donot... |       | 5     | 2                         |
| Alexis     |             | Host      |        | ScholarOne  | host21@donot... |       | 5     | 3                         |
| Ben        |             | Host      |        | ScholarOne  | host7@donots... |       | 5     | 3                         |
| Christina  |             | Host      |        | ScholarOne  | host12@donot... |       | 5     | 2                         |
| David      |             | Host      |        | ScholarOne  | s1ahost5@gm...  |       | 5     | 1                         |
| Elsie      |             | Host      |        | ScholarOne  | host15@donot... |       | 5     | 2                         |

Page 1 of 1 | 50 Records per page | Displaying 1 - 24 of 24

**Current Hosts** Remove Selected

|   | First Name | Last Name | Institution | Country | State | Email Address       | Phone | Role      |
|---|------------|-----------|-------------|---------|-------|---------------------|-------|-----------|
| 1 | Jami       | Host      | ScholarOne  |         |       | host22@donotsend... |       | Moderator |

303615 [edit] 10 Clinical 30 60 Save Save & Close Close  
 266116 [edit] 30 Clinical Session #1 60

Once you have the correct person, simply drag and drop them from the top grid to the bottom grid. You will need to assign the person a role by clicking the **Role** field and choosing the desired role from the drop-down box. The roles listed in the dropdown are the roles you created in **Meeting Setup > Roles**.

**Available Hosts**

Search: host

Search for New Hosts

| First Name | Middle Name | Last Name | Suffix | Institution | Email Address   | Phone | Limit | # of Assigned to Sessions |
|------------|-------------|-----------|--------|-------------|-----------------|-------|-------|---------------------------|
| Alex       |             | Host      |        | ScholarOne  | host10@donot... |       | 5     | 2                         |
| Alexis     |             | Host      |        | ScholarOne  | host21@donot... |       | 5     | 3                         |
| Ben        |             | Host      |        | ScholarOne  | host7@donots... |       | 5     | 4                         |
| Christina  |             | Host      |        | ScholarOne  | host12@donot... |       | 5     | 2                         |
| David      |             | Host      |        | ScholarOne  | host5@am...     |       | 5     | 1                         |
| Elsie      |             | Host      |        | ScholarOne  |                 |       |       |                           |

Assign a Person's Role by clicking the Role field and choosing the desired role from the drop-down

**Current Hosts**

Remove Selected

|   | First Name | Last Name | Institution | Country | State | Email Address        | Phone | Role  |
|---|------------|-----------|-------------|---------|-------|----------------------|-------|---|
| 1 | Ben        | Host      | ScholarOne  |         |       | host7@donotsend.c... |       | <ul style="list-style-type: none"> <li>Co-chair</li> <li>Lecturer</li> <li>Moderator</li> <li>Panel Leader</li> </ul> |

303615 [edit] 10 Clinical 30 60 Save Save & Close Close

## Create Host Account On the Fly

If you search for a host and they do not have an account in the system, you can add a new host on-the-fly. Click the **Search for New Hosts** link in the Session host tab, **Add/Edit Hosts**. You will be required to search for the host before you can add an account.

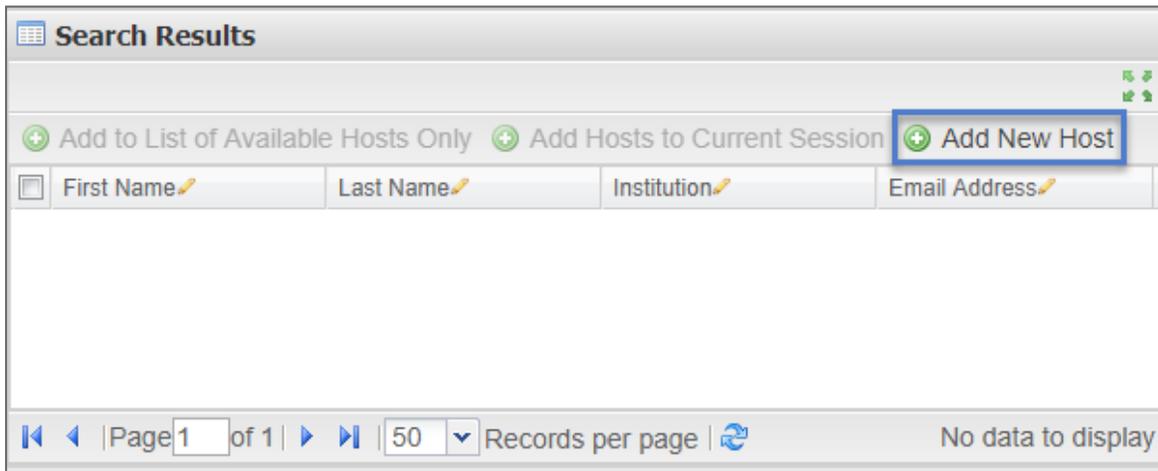
Enter the information for the Host you would like to search for and click **Search**. You can search on **First Name**, **Last Name**, **Institution** or **Email Address**.

The screenshot displays the 'Search Hosts' interface. On the left, there are two tables: 'Available Hosts' and 'Current Hosts'. The 'Available Hosts' table lists names like Alex, Alexis, Ben, Christina, David, and Elsie. The 'Current Hosts' table shows 'Ben' as the only host. The main area is titled 'Search Hosts' and contains a 'Search Criteria' section with input fields for 'First Name', 'Last Name' (containing 'smith'), 'Institution', and 'Email Address'. There is a checkbox for 'Is an author on an Abstract?'. Below the criteria is a 'Search' button and a 'Close' button. The 'Search Results' section shows a table with three results: Alex Smith at Clarivate Analytics, and Grace Smith at Grace Inc. The interface includes pagination controls at the bottom, showing 'Page 1 of 1' and '50 Records per page'.

The following message will display if the person does not have an account in the system. Click **Ok**.

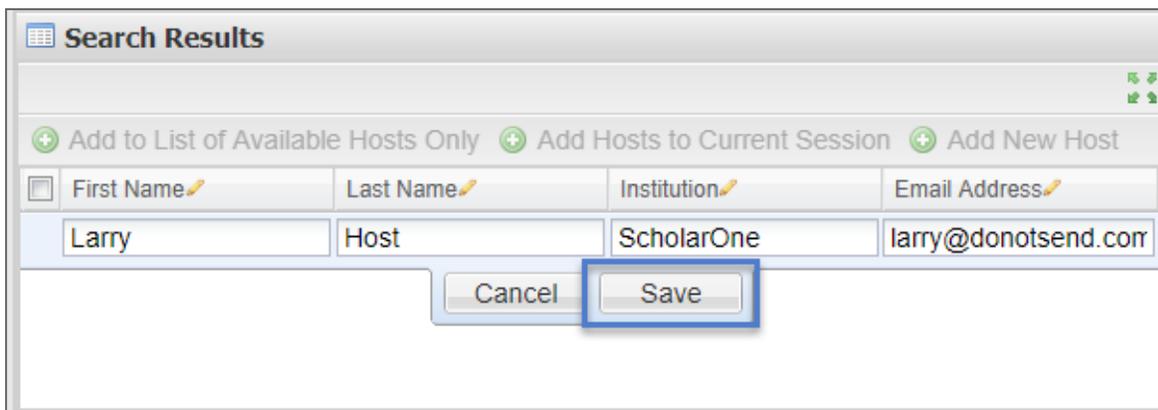
This screenshot shows the 'Search Criteria' form with a search for 'tom' in the 'Last Name' field. A 'Search Result' message box is overlaid on the bottom left, containing a yellow warning icon and the text: 'Your search returned no results, please try again or add a new host.' Below the message is an 'OK' button. The background shows the search criteria fields and the 'Search' and 'Close' buttons.

To add the host, click the **Add New Host** button.



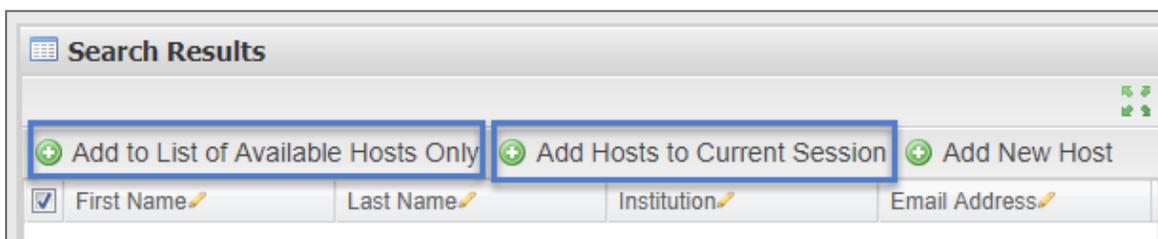
The screenshot shows the 'Search Results' interface. At the top, there are three buttons: 'Add to List of Available Hosts Only', 'Add Hosts to Current Session', and 'Add New Host'. The 'Add New Host' button is highlighted with a blue box. Below the buttons is a table with columns: 'First Name', 'Last Name', 'Institution', and 'Email Address'. The table is currently empty. At the bottom, there is a pagination bar showing 'Page 1 of 1', '50 Records per page', and 'No data to display'.

Enter the required host information; **First Name**, **Last Name**, **Institution**, and **Email Address** and click **Save**.



The screenshot shows the 'Search Results' interface with the 'Add New Host' form open. The form has four input fields: 'First Name' (containing 'Larry'), 'Last Name' (containing 'Host'), 'Institution' (containing 'ScholarOne'), and 'Email Address' (containing 'larry@donotsend.com'). Below the fields are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a blue box.

Once the host has been saved, click the checkbox to the left of the host name and select **Add to List of Available Hosts** or **Add Host to Current Session**.



The screenshot shows the 'Search Results' interface. At the top, there are three buttons: 'Add to List of Available Hosts Only', 'Add Hosts to Current Session', and 'Add New Host'. The 'Add to List of Available Hosts Only' button is highlighted with a blue box. Below the buttons is a table with columns: 'First Name', 'Last Name', 'Institution', and 'Email Address'. The table is currently empty. At the bottom, there is a pagination bar showing 'Page 1 of 1', '50 Records per page', and 'No data to display'.

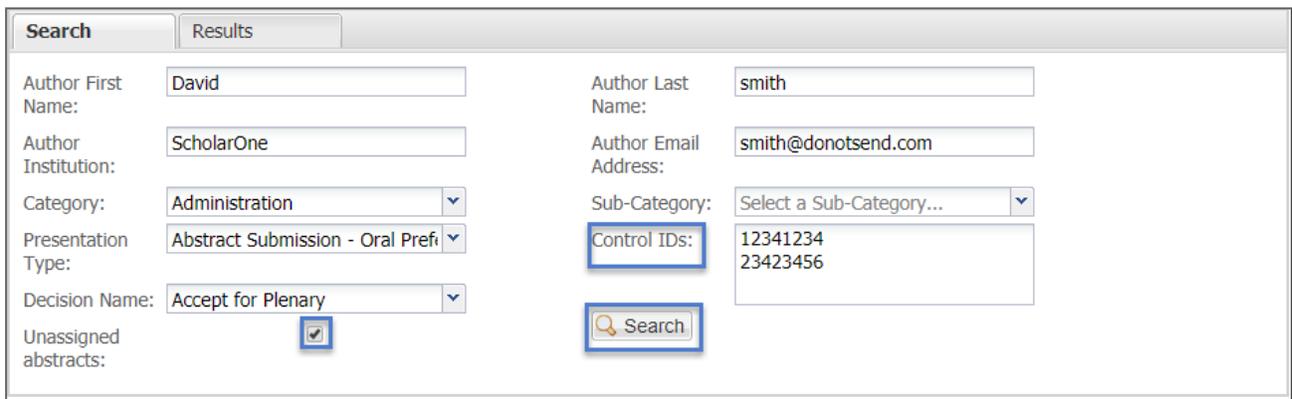
## ADD ABSTRACTS TO SESSIONS

The final step in building a complete session is adding the abstracts to the Session. In the **Sessions & Events** grid open a session (click on the Edit column link) and go to the **Manage Abstracts** tab. Search for the abstracts you would like to assign to the session.

---

**Note:** You may search for abstracts by Decision Status as well as Category, Sub Category, Presentation Type, specific Author Last Name or Email Address, and Control ID. You can search on more than one control id. All unassigned abstracts will list those abstracts that have yet to be put in any session.

---



The screenshot shows a search interface with two tabs: "Search" and "Results". The "Search" tab is active. The form contains the following fields and controls:

- Author First Name: Text input with "David" entered.
- Author Last Name: Text input with "smith" entered.
- Author Institution: Text input with "ScholarOne" entered.
- Author Email Address: Text input with "smith@donotsend.com" entered.
- Category: Dropdown menu with "Administration" selected.
- Sub-Category: Dropdown menu with "Select a Sub-Category..." selected.
- Presentation Type: Dropdown menu with "Abstract Submission - Oral Prefi" selected.
- Control IDs: Text input with "12341234" and "23423456" entered.
- Decision Name: Dropdown menu with "Accept for Plenary" selected.
- Unassigned abstracts: Checkmark box checked.
- Search: Button with a magnifying glass icon.

Assign the abstracts by dragging and dropping them into the **Currently Assigned Abstracts** area. If you have multiple abstracts to assign from your search results, you can also check the box next to each abstract and click **Assign Selected Abstracts**. Once the abstracts are assigned, they will appear in the **Currently Assigned** section of the search results.

**Results**

Search:

**Assign Selected Abstracts**

| Control ID                                  | Title       | Submitted Date | Presenting Author | Status           | Category         | Sub-Category | Presentation Type |
|---|-------------|----------------|-------------------|------------------|------------------|--------------|-------------------|
| <input checked="" type="checkbox"/> 2082947 | Abstract #1 | Mon 9/15/2014  | Support, Meetings | Decisioned Ac... | Basic Science    | none         | Poster Prefer     |
| <input checked="" type="checkbox"/> 2280347 | Abstract #3 | Wed 4/01/2015  | Support, Meetings | Decisioned Ac... | Basic Science    | none         | Poster Prefer     |
| <input checked="" type="checkbox"/> 2280391 | Abstract #5 | Wed 4/01/2015  | Support, Meetings | Submitted        | Clinical Science | none         | Poster Only       |
| <input checked="" type="checkbox"/> 2280392 | Abstract #6 | Wed 4/01/2015  | Support, Meetings | Decisioned Ac... | Clinical Science | none         | Video             |
| <input checked="" type="checkbox"/> 2280414 | Abstract #7 | Wed 4/01/2015  | Support, Meetings | Decisioned Ac... | Clinical Science | none         | Video             |

Page 1 of 1 | 50 Records per page | Displaying 1 - 32 of 32

Users may drag and drop between both grids or within each individual grid, allowing users to both add and remove abstracts or to change the order of presentations in the session.

Should someone need to have their presentation withdrawn for any reason, click on the abstract and either click the **Withdraw Selected** button or right-click and select **Withdraw** from the option list. Abstracts that are withdrawn are kept in the session and may show in exports (if configured). If you want to remove an abstract completely, highlight the abstract and then click **Remove Selected**.

**Currently Assigned Abstracts**

Search:

Select One... Save/Edit | Delete

Add Placeholder **Withdraw Selected** **Remove Selected** Mass Update

Duration: 0 min -- Remaining: 90 min

|   | Control ID | Edit                 | Final ID | Title       | Presenting Author | Order | Start T... | End Ti... | Day/Date         | Presentation Type | Duration |
|---|------------|----------------------|----------|-------------|-------------------|-------|------------|-----------|------------------|-------------------|----------|
| 1 | 2082947    | <a href="#">Edit</a> |          | Abstract #1 | Support, Meetings | 1     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | Poster Preferred  | 0        |
| 2 | 2280347    | <a href="#">Edit</a> |          | Abstract #3 | Support, Meetings | 2     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | Poster Preferred  | 0        |
| 3 | 2280391    | <a href="#">Edit</a> |          | Abstract #5 | Support, Meetings | 3     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | Poster Only       | 0        |
| 4 | 2280392    | <a href="#">Edit</a> |          | Abstract #6 | Support, Meetings | 4     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | Video             | 0        |
| 5 | 2280414    | <a href="#">Edit</a> |          | Abstract #7 | Support, Meetings | 5     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | Video             | 0        |

## Add Placeholder to a Session

For sessions with breaks, you can insert a **Placeholder** within the presentation line up. This is often used for coffee breaks or lunches that fall between *presentations*. If you have coffee breaks or lunches between *sessions*, then you would enter an **Event** on the Program level instead.

Click **Add Placeholder** in the **Currently Assigned Abstracts** grid. Give the placeholder a name and apply a duration. Drag and drop the placeholder to the correct location in the session.

| Control ID | Edit ...             | Duration | Title        | Order | Start Time | End Time | Day/Date            |
|------------|----------------------|----------|--------------|-------|------------|----------|---------------------|
| 1 2287061  | <a href="#">Edit</a> | 20       | Abstract #12 | 1     | 7:45 AM    | 8:05 AM  | Saturday 10/15/2016 |
| 2 2287117  | <a href="#">Edit</a> | 10       | Abstract #23 | 2     | 8:05 AM    | 8:15 AM  | Saturday 10/15/2016 |
| 3          |                      | 10       | Coffee Break | 3     | 8:15 AM    | 8:25 AM  | Saturday 10/15/2016 |
| 4 2287124  | <a href="#">Edit</a> | 20       | Abstract #27 | 4     | 8:25 AM    | 8:45 AM  | Saturday 10/15/2016 |

---

**Note:** Placeholders can also be used to designate times in a session where the Admin knows an invited speaker will present.

---

## SET DURATIONS

### Using the Mass Update Tab

To set the duration of an abstract presentation, go to the **Currently Assigned Abstracts** grid located on the **Manage Abstracts** tab of the Edit Session window.

If the Session Type has a configured default duration value (available in **the Meeting Setup > Session Type**), it will set the duration for each abstract as it is added to the session. Otherwise, you may manually set the presentation duration in the **Duration** column by double clicking in that field and typing in the desired value.

**Currently Assigned Abstracts**

Search:

Select One... Save/Edit | Delete

+ Add Placeholder | - Withdraw Selected | - Remove Selected | Mass Update ▾ Duration: 0 min -- Remaining: 90 min

|   | Control ID              | Edit ...             | Duration | Title       | Order | Start T... | End Ti... | Day/Date         | Distin...                | Category         | Invitation Status | Avg Sc... |
|---|-------------------------|----------------------|----------|-------------|-------|------------|-----------|------------------|--------------------------|------------------|-------------------|-----------|
| 1 | <a href="#">2082947</a> | <a href="#">Edit</a> | 15       | Abstract #1 | 1     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | <input type="checkbox"/> | Basic Science    | Not Yet Invited   | 3.5       |
| 2 | <a href="#">2280347</a> | <a href="#">Edit</a> | 0        | Abstract #3 | 2     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | <input type="checkbox"/> | Basic Science    | Not Yet Invited   |           |
| 3 | <a href="#">2280391</a> | <a href="#">Edit</a> | 0        | Abstract #5 | 3     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | <input type="checkbox"/> | Clinical Science | Not Yet Invited   |           |
| 4 | <a href="#">2280392</a> | <a href="#">Edit</a> | 0        | Abstract #6 | 4     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | <input type="checkbox"/> | Clinical Science | Not Yet Invited   |           |
| 5 | <a href="#">2280414</a> | <a href="#">Edit</a> | 0        | Abstract #7 | 5     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | <input type="checkbox"/> | Clinical Science | Not Yet Invited   |           |

If you wish to assign durations of equal value to the current presentations, select **Mass Update**. The **Assign Durations** button will suggest a time to set for all session presentations, based on the number of abstracts in the session and the total duration of the session.

**Currently Assigned Abstracts**

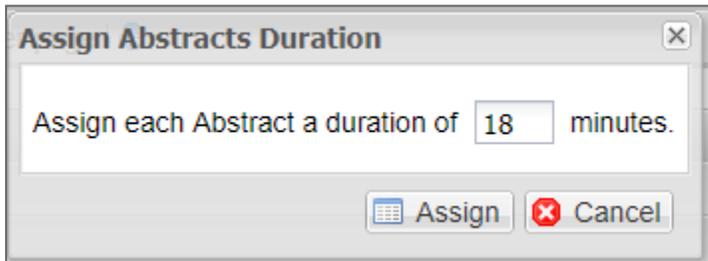
Select One... Save/Edit | Delete

+ Add Placeholder | - Withdraw Selected | - Remove Selected | Mass Update ▾

|   | Control ID              | Edit ...             | Duration | Title       | Order | Start T... | End Ti... | Day/Date         | Distin...                | Category         | Invitation Status | Avg Sc... |
|---|-------------------------|----------------------|----------|-------------|-------|------------|-----------|------------------|--------------------------|------------------|-------------------|-----------|
| 1 | <a href="#">2082947</a> | <a href="#">Edit</a> | 15       | Abstract #1 | 1     | 8:00 AM    | 8:00 AM   | Saturday 10/1... | <input type="checkbox"/> | Basic Science    | Not Yet Invited   | 3.5       |
| 2 | <a href="#">2280347</a> | <a href="#">Edit</a> | 0        | Abstract #3 | 2     | 8:15 AM    | 8:15 AM   | Saturday 10/1... | <input type="checkbox"/> | Basic Science    | Not Yet Invited   |           |
| 3 | <a href="#">2280391</a> | <a href="#">Edit</a> | 0        | Abstract #5 | 3     | 8:15 AM    | 8:15 AM   | Saturday 10/1... | <input type="checkbox"/> | Clinical Science | Not Yet Invited   |           |
| 4 | <a href="#">2280392</a> | <a href="#">Edit</a> | 0        | Abstract #6 | 4     | 8:15 AM    | 8:15 AM   | Saturday 10/1... | <input type="checkbox"/> | Clinical Science | Not Yet Invited   |           |
| 5 | <a href="#">2280414</a> | <a href="#">Edit</a> | 0        | Abstract #7 | 5     | 8:15 AM    | 8:15 AM   | Saturday 10/1... | <input type="checkbox"/> | Clinical Science | Not Yet Invited   |           |

Assign Durations  
 Assign Final ID(s)  
 Assign DOI(s)

For example, if the session duration is 90 minutes and there are 9 presentations in the session, clicking the **Assign Durations** button will trigger a prompt to set all presentations to a duration of 10 minutes. However, you may overwrite the suggested value by simply typing in a new value via inline editing.

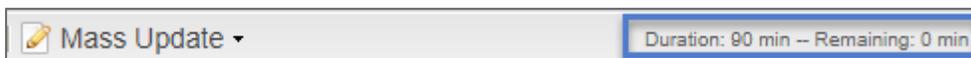



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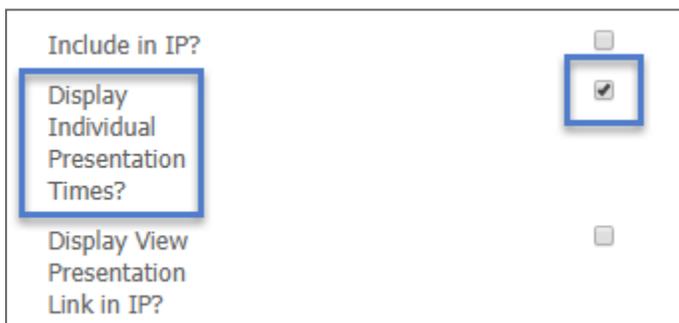
**Note:** For Presentations that extend the full length of the session, you may leave the duration value as zero.

---

You will see in the right corner of the grid a section that helps track durations. It lists the Time Remaining and Current Duration as time is set for each session.



In the Information tab, you can configure a presentation to be either set at the full session duration or set by individual presentation type.



## Using Controlled by Presentation Type

You can control the duration of specific abstracts within a session type by selecting a Submission **Role/Presentation Type** combination.

To set up the process, access **Types** under Meeting Setup. Right-click on the session type and click **Edit Type**.

**Session Center**

- Dashboard & Instructions >
- Meeting Setup**
- Programs >
- Room Availability >
- Types** >
- Topics >
- Hosts >
- Roles >
- Sessioning >
- Invitations & Email >

**Instructions**

**MANAGE SESSION & EVENT TYPES**  
Session Types are a way of categorizing sessions into related groups such as the record.

**Types**

+ Add Type | - Delete Types | 📄 Export to Excel

| <input type="checkbox"/>            | Session / Event Type Name |             |
|-------------------------------------|---------------------------|-------------|
| <input checked="" type="checkbox"/> | Clinical Session          | Edit Type   |
| <input type="checkbox"/>            | Luncheon                  | Delete Type |
| <input type="checkbox"/>            | Meet the Expert           |             |
| <input type="checkbox"/>            | Minisymposium             |             |
| <input type="checkbox"/>            | Oral                      |             |
| <input type="checkbox"/>            | Plenary                   |             |

Scroll to the bottom of the window to assign the durations by Presentation Type. Select the Submission **Role/Presentation Type** combination to assign the durations you would like to automatically be assigned.

Duration by Presentation Type Assignment

Role/Presentation Types:  Duration (in minutes):

Enter the **Duration** in minutes for the selected Submission Role/Presentation Type. Click **Assign Durations**.

---

**Note:** The assignments are not retroactive for presentations that have already had their duration assigned.

---

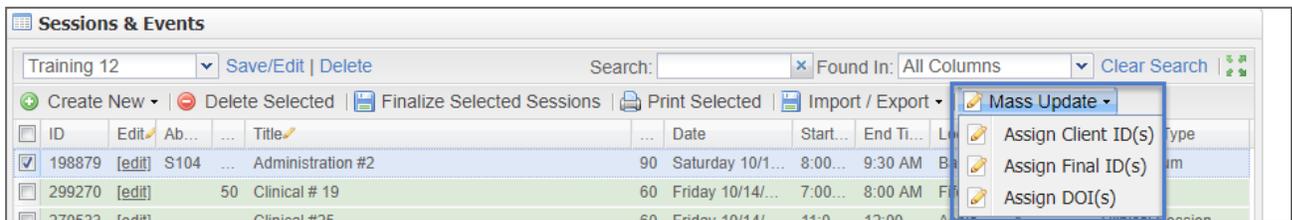
For abstracts that meet the Role/Presentation Type for a specific session type, the durations will be automatically assigned.

## Adjust Duration

You may adjust the session duration after scheduling without unscheduling the session. The new end time will automatically calculate.

## ASSIGNING IDS

You can assign three types of IDs for your sessions and abstract presentations: Final IDs, DOIs, and Client Session IDs. The **Mass Update** button automates the numbering. The **Mass Update** tool is available from the main **Session & Event** grid.



## Final IDs and DOIs

Final IDs are used to assign unique numbering formats to presentations across all presentations in a program or by specified sessions. You can also apply sequential numbering within a session. Arrange your sessions and presentations in the desired order. **Select Assign Final ID or Assign DOI** from the **Mass Update** tool, create the numbering format using the available tags, and select **Run**. Select **Edit** or **Delete** to modify the desired format.

**Assign Abstract Final ID(s)** ession in question and navigating to the "Add/Edit Hosts"

**Instructions**

Create a final id string in the area below by naming your format (i.e. - Monday Posters) and then entering the final id exactly as you would like it to display, using the numbering tags to designate your preferred numbering style. Two numbering formats have been created for your reference (feel free to edit or delete these); you may hover over each of the Available Tags to get more information on what they are and how they might work.

[EDIT INSTRUCTIONS]

**Available Tags:**  
 Session Abbreviation Tag - ##SESS\_ABBV##  
 Year Tags - ##YEAR##, ##NEXT\_YEAR##  
 Numbering Tags - ##NUM1##, ##NUM2##, ##NUM3##, ##NUM4##

---

**Final ID Formats & Examples:**

| Name   | Format   | Appearance |   |
|--|--|------------|---|
| Number only                                    | ##NUM1##                                       | 1          | <a href="#">run</a>   <a href="#">edit</a>   <a href="#">delete</a> |
| Sample format                                  | ##YEAR## ##NUM2##                              | 2015 01    | <a href="#">run</a>   <a href="#">edit</a>   <a href="#">delete</a> |
| New <input type="text" value="Sample format"/> | <input type="text" value="##YEAR## ##NUM2##"/> |            | <a href="#">save</a>  |

Event 0 30 Wednesday 10/14/2015 0  
 Session 0 0 0

 Close

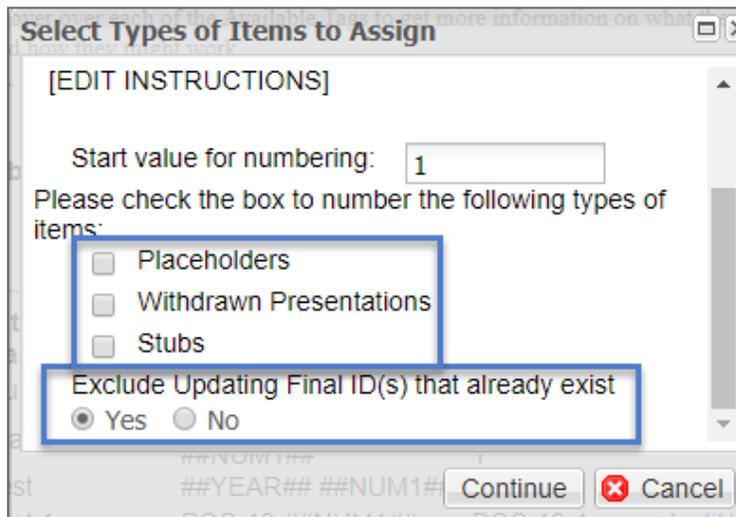
---

**Note:** Hover over the examples under **Available Tags** to see more information on the tag options.

---

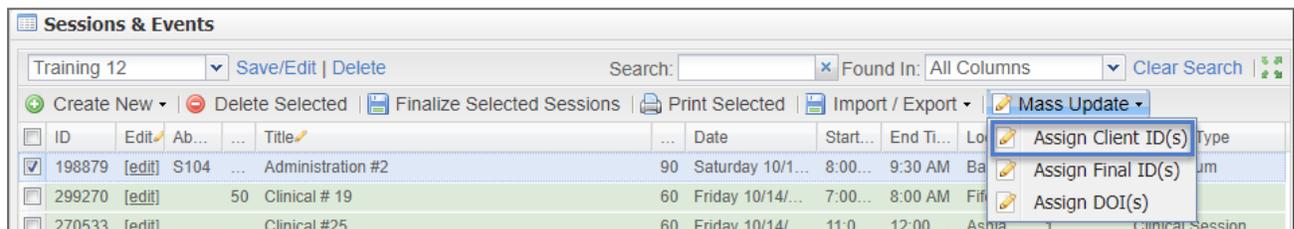
You may choose to skip numbering on abstracts that already have final IDs assigned. You can also choose to skip numbering on placeholders, withdrawn abstracts, and stubs.

Select **Run** and then click the **Yes** option for **Exclude Updating Final ID(s) that Already Exist**. Check the placeholders, withdrawn presentations, and stubs to skip numbering on these abstract presentation types.



## Client Session IDs

Client Session IDs determine the print order of sessions and events. In the **Sessions & Events** Grid, arrange your sessions and events in the proper order using sorting and filtering. Check the desired sessions and events in the Grid. Select **Mass Update** and navigate to **Assign Client Session IDs**.

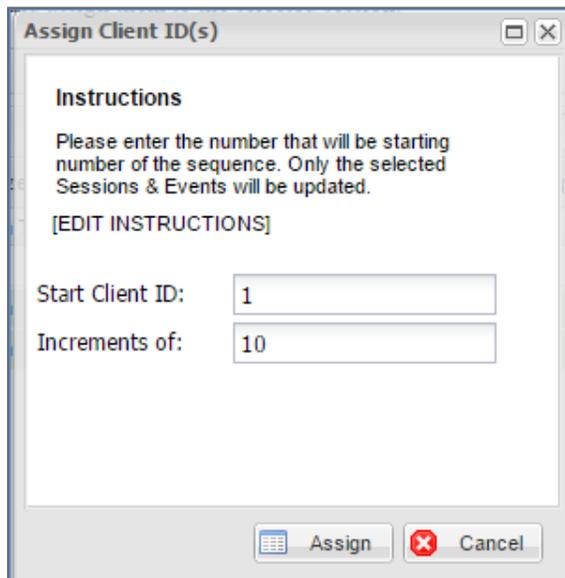


Indicate the starting value and the incremental value for the IDs. Click **Assign** when you are ready to have the system update the IDs. Assignment of IDs can be repeated if the program changes order.

---

**Note:** Incrementing by 10 will allow you to insert sessions and events after the Client Session IDs have initially been assigned.

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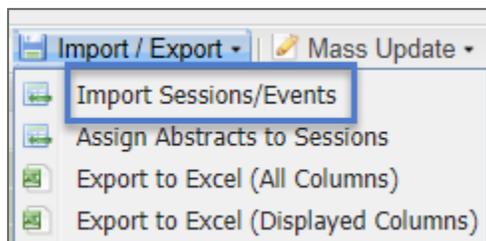
**Note:** You can do all three steps of building a session in one process. Move from task to task by clicking on the tabs of the session (Information, Add/Edit Hosts, Manage Abstracts).

---

## SESSION IMPORTS

### Import Session and Events

As an alternate option, you can import session information via an import template. Click on **Import/Export** and choose **Import Sessions/Events**.



Download the template and resources files. You will use the resources to properly designate the data in the fields you will include in your import. The template includes all

possible sessioning and scheduling fields. It is not necessary to populate all fields. Session title, type and duration are the required fields for the import. Fields like Topics are often required as well.

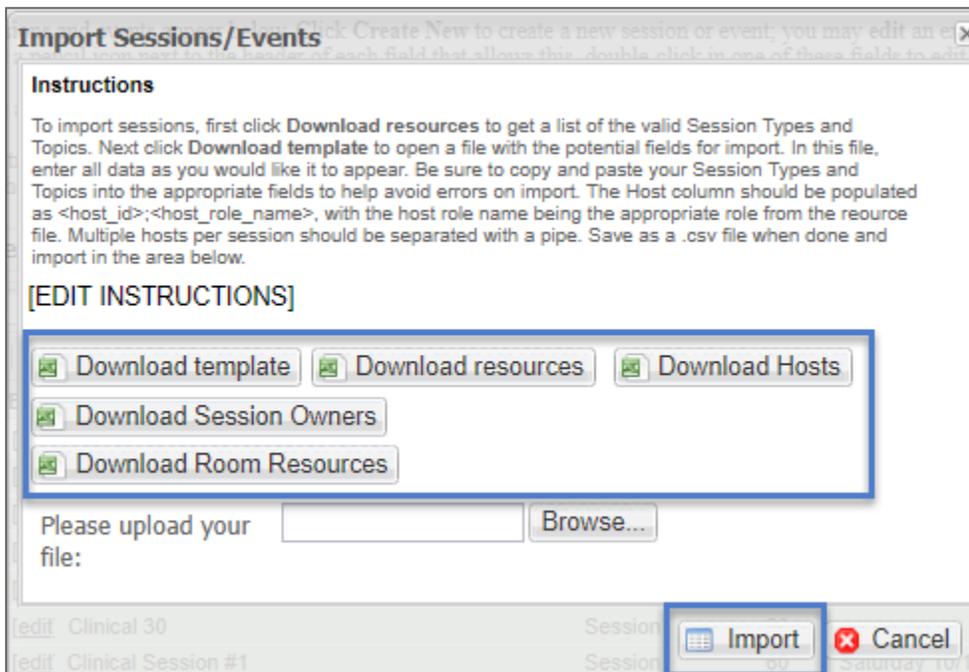
---

**Note:** The best way to resolve the required fields for your configuration is to start a new session and note which fields are required. The fields are the same for the import.

---

Hosts, session owners, and room resources include the identifying number for each entity. You must use the unique identifiers in the import template. If you prefer to schedule your session and events after the import, you do not need to include scheduling information in the template.

Once you have your template completed, save it as a .csv file and Import it.



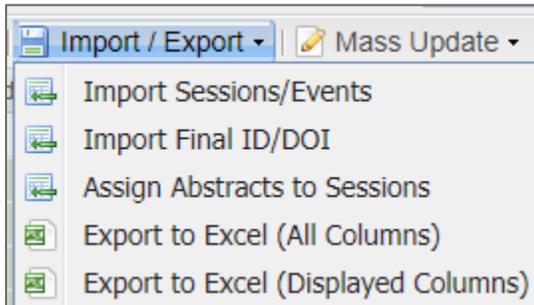
---

**Note:** You can do more than one import.

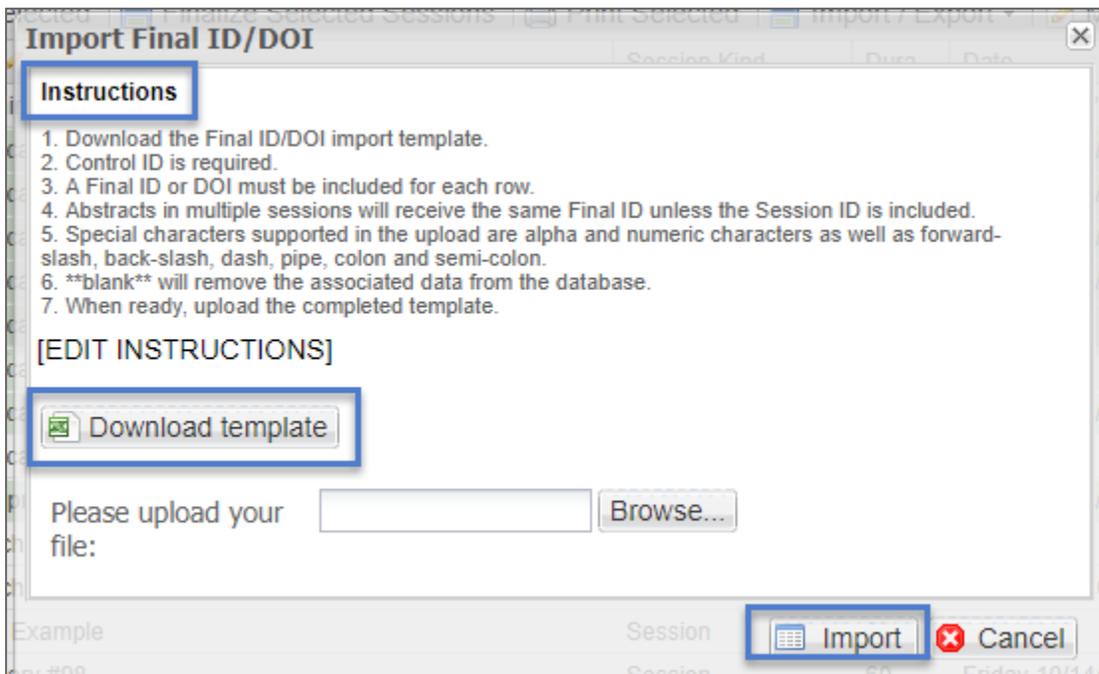
---

## Import Final ID/DOI

To begin importing Final ID/DOIS, click on **Import/Export** and select **Import Final ID/DOI**.



In the pop-up window, download the import template. Instructions are available above the template download. Complete the template, save the file as a .csv file and click **Upload**.

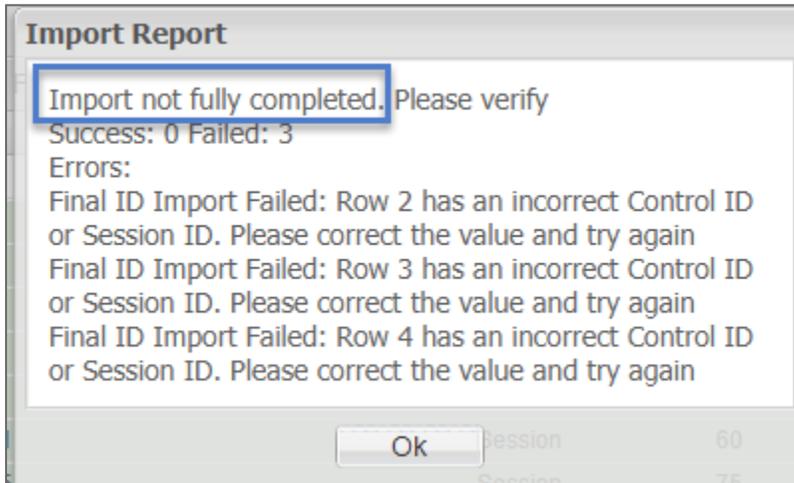


---

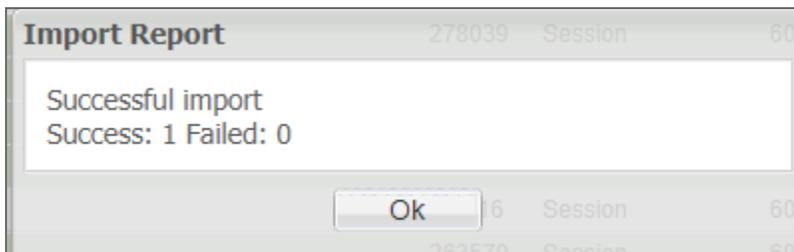
**Note:** Either a Final ID or DOI is required for a successful import.

---

If a row in the uploaded template is missing any of the required fields, the import will fail, and an error will display. If multiple rows fail, the error message will list each failure.



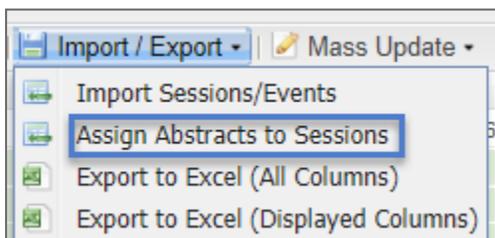
If the import is successful, a confirmation message will display.



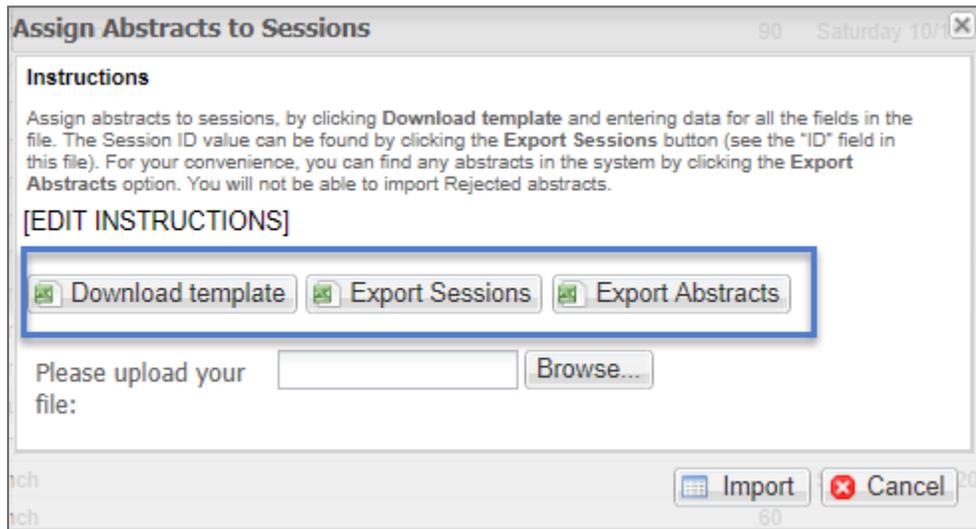
## Import Abstracts

When your sessions have been created, you can perform an Abstract Import.

Click **Import/Export** and select **Assign Abstracts to Sessions** from the dropdown.



Download the template and the two export files.



The Export Sessions file represents all session data including the unique session id. You will use this id to designate abstracts to sessions.

The Export Abstracts file represents all abstract data including Control ID. You will use the Control ID to designate which abstract is to be placed in each session.

Here is sample import template:

The screenshot shows an Excel spreadsheet with the following data:

| Session ID | Session Title | Control ID | Duration | Presentation Order |
|------------|---------------|------------|----------|--------------------|
| 1234567    | Sample #1     | 8009000    | 15       | 1                  |
| 1234567    | Sample #1     | 9900800    | 30       | 2                  |
| 2345678    | Sample #2     | 9900899    | 20       | 1                  |
| 2345678    | Sample #2     | 9900888    | 20       | 2                  |
| 2345678    | Sample #2     | 9900879    | 20       | 3                  |
| 2345678    | Sample #2     | 9900800    | 20       | 4                  |
| 2345678    | Sample #2     | 9900800    | 20       | 5                  |

You will use the session ID instead of the session title for the import. Note which Control IDs will be placed in each session. Each Control ID will need a duration and a presentation order.

---

**Note:** You can do more than one import.

---

## CHANGING COLUMN HEADERS AND RESOURCES

Do not change column headers or resources. Imports with altered headers and resources will fail.

## SESSION EXPORTS

There are two options for exporting session information to Excel. Export to Excel (All Columns) includes all columns available for the Session & Event grid. Export to Excel (Displayed Columns) exports those columns you have chosen for your grid configuration.

## FINALIZE SESSIONS FOR SPEAKER MANAGEMENT

If your configuration includes Speaker Management (Invitations and Emails), you will need to finalize each session to make the data available in the Speaker Management grid. Check the sessions you want to finalize and select **Finalize Selected Sessions**. Sessions that have been finalized will appear in green highlight.

| Sessions & Events                   |        |                    |           |                   |                              |                     |                       |          |             |                |                  |
|-------------------------------------|--------|--------------------|-----------|-------------------|------------------------------|---------------------|-----------------------|----------|-------------|----------------|------------------|
| Training 12                         |        | Save/Edit   Delete |           |                   | Search: <input type="text"/> |                     | Found In: All Columns |          |             |                |                  |
|                                     |        |                    |           |                   |                              |                     |                       |          |             |                |                  |
| <input type="checkbox"/>            | ID     | Abbrev             | Client ID | Title             | Duration                     | Date                | Start Time            | End Time | Location    | # of Assign... | Session Type     |
| <input checked="" type="checkbox"/> | 198879 | S104               |           | Administration #2 | 90                           | Saturday 10/15/2016 | 8:00 AM               | 9:30 AM  | Barbours... | 0              | Symposium        |
| <input type="checkbox"/>            | 299270 |                    |           | Clinical # 19     | 60                           | Friday 10/14/2016   | 7:00 AM               | 8:00 AM  | Fifeville   | 1              | Oral             |
| <input type="checkbox"/>            | 270533 |                    |           | Clinical #25      | 60                           | Friday 10/14/2016   | 11:00 AM              | 12:00 PM | Ashlawn ... | 1              | Clinical Session |
| <input type="checkbox"/>            | 264349 | CL2                |           | Clinical #3       | 60                           |                     |                       |          |             | 1              | Minisymposium    |
| <input type="checkbox"/>            | 278039 |                    |           | Clinical 19       | 60                           | Friday 10/14/2016   | 9:30 AM               | 10:30 AM | Christina   | 1              | Clinical Session |

---

**Note:** If you make a change to the session after it has been finalized, you will need to refinalize the session.

---

## CUSTOMIZE THE SESSION AND EVENTS GRID

The Session Center's multi-column, multi-row grid has a number of unique and dynamic features that allow you to customize the data display. Within the grid you can add and remove columns, sort and filter, and import or export data.

## ADD AND REMOVE GRID COLUMNS

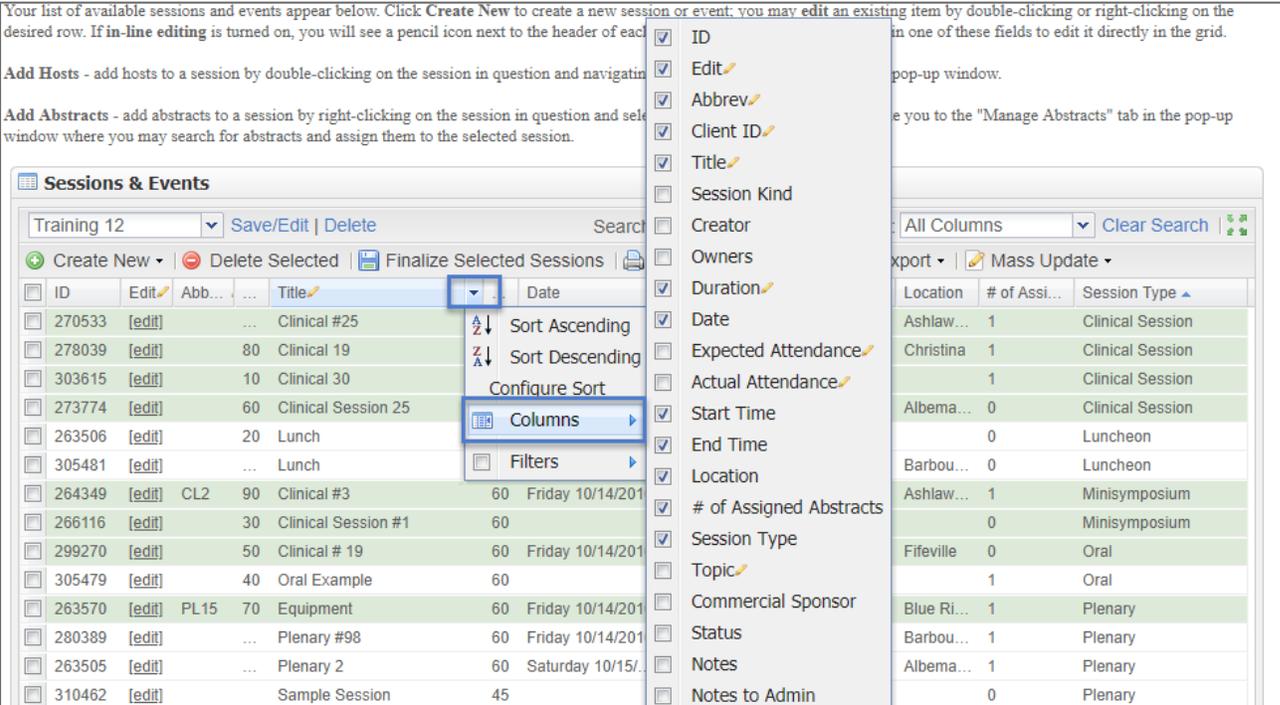
Each grid includes a default set of columns displayed when the page is initially loaded. In addition to the default columns, there may also be a number of additional columns which are initially hidden from view. To see the full list of available columns for the overall grid, rolling your mouse over any column header will reveal a small down arrow.

Clicking the down-arrow and then hovering over the **Columns** selection will show a list of all available columns. Columns checked are those currently displayed. To add or remove a column from the display, simply check or uncheck the column label within the **Columns** list.

Your list of available sessions and events appear below. Click **Create New** to create a new session or event; you may **edit** an existing item by double-clicking or right-clicking on the desired row. If **in-line editing** is turned on, you will see a pencil icon next to the header of each column.

**Add Hosts** - add hosts to a session by double-clicking on the session in question and navigating to the "Manage Hosts" tab in the pop-up window.

**Add Abstracts** - add abstracts to a session by right-clicking on the session in question and selecting the "Manage Abstracts" tab in the pop-up window where you may search for abstracts and assign them to the selected session.



| ID     | Edit   | Abb...  | Title               | Date                  |
|--------|--------|---------|---------------------|-----------------------|
| 270533 | [edit] | ...     | Clinical #25        |                       |
| 278039 | [edit] | 80      | Clinical 19         |                       |
| 303615 | [edit] | 10      | Clinical 30         |                       |
| 273774 | [edit] | 60      | Clinical Session 25 |                       |
| 263506 | [edit] | 20      | Lunch               |                       |
| 305481 | [edit] | ...     | Lunch               |                       |
| 264349 | [edit] | CL2 90  | Clinical #3         | 60 Friday 10/14/201   |
| 266116 | [edit] | 30      | Clinical Session #1 | 60                    |
| 299270 | [edit] | 50      | Clinical # 19       | 60 Friday 10/14/201   |
| 305479 | [edit] | 40      | Oral Example        | 60                    |
| 263570 | [edit] | PL15 70 | Equipment           | 60 Friday 10/14/201   |
| 280389 | [edit] | ...     | Plenary #98         | 60 Friday 10/14/201   |
| 263505 | [edit] | ...     | Plenary 2           | 60 Saturday 10/15/... |
| 310462 | [edit] |         | Sample Session      | 45                    |

## REARRANGE COLUMNS

Drag and Drop functionality also allows for rearranging of columns. Simply left click on a column header and with the left mouse button pressed down, drag the column to the position in the Grid you wish for it to appear. Release the left mouse button. You will see two blue arrows indicating the new position.

## SORT GRID DATA

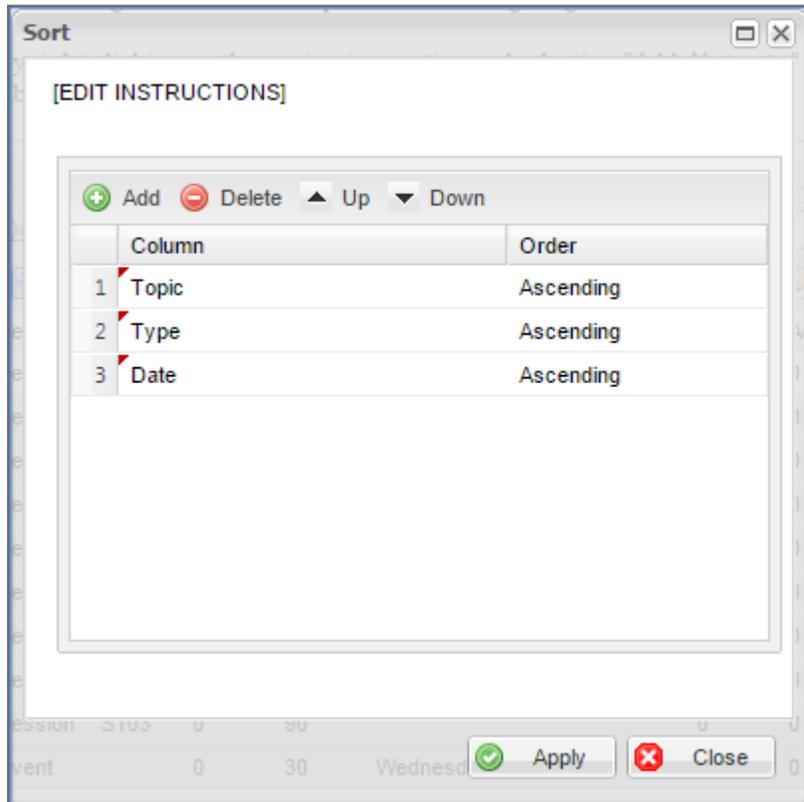
Data sort order can be modified for a column by clicking once on the column header. A drop-down menu will display both Ascending and Descending sorts. Click on the preferred sort to activate. If you would like to switch the sort order from Ascending and Descending or vice versa, simply repeat this process.

| ID     | Edit   | Title                  | Date                  | Start Time | End Time | Location   | # of Assig... | Session Type     |
|--------|--------|------------------------|-----------------------|------------|----------|------------|---------------|------------------|
| 270533 | [edit] | 1... Clinical #25      | 60 Friday 10/14/2016  | 2 PM       |          | Ashlaw...  | 1             | Clinical Session |
| 278039 | [edit] | 80 Clinical 19         | 60 Friday 10/14/2016  | 2 AM       |          | Christina  | 1             | Clinical Session |
| 303615 | [edit] | 10 Clinical 30         | 60                    |            |          |            | 1             | Clinical Session |
| 273774 | [edit] | 60 Clinical Session 25 | 75 Friday 10/14/2016  | AM         |          | Albemar... | 0             | Clinical Session |
| 263506 | [edit] | 20 Lunch               | 60                    |            |          |            | 0             | Luncheon         |
| 305481 | [edit] | ... Lunch              | ... Sunday 10/16/2016 | PM         |          | Barbour... | 0             | Luncheon         |

Data can also be sorted on multiple criteria. Select **Configure Sort** in the column header drop-down.

| ID     | Edit   | Title                  | Date                  | Start Time | End Time | Location   | # of Assig... | Session Type     |
|--------|--------|------------------------|-----------------------|------------|----------|------------|---------------|------------------|
| 270533 | [edit] | 1... Clinical #25      | 60 Friday 10/14/2016  | 2 PM       |          | Ashlaw...  | 1             | Clinical Session |
| 278039 | [edit] | 80 Clinical 19         | 60 Friday 10/14/2016  | 2 AM       |          | Christina  | 1             | Clinical Session |
| 303615 | [edit] | 10 Clinical 30         | 60                    |            |          |            | 1             | Clinical Session |
| 273774 | [edit] | 60 Clinical Session 25 | 75 Friday 10/14/2016  | AM         |          | Albemar... | 0             | Clinical Session |
| 263506 | [edit] | 20 Lunch               | 60                    |            |          |            | 0             | Luncheon         |
| 305481 | [edit] | ... Lunch              | ... Sunday 10/16/2016 | PM         |          | Barbour... | 0             | Luncheon         |

Apply the proper sort criteria using the **Add**, **Delete**, and **Up** and **Down** arrows.



Once the sort is complete, numbering next to the column headers will indicate the appropriate sort that was applied.



## SAVING VIEWS

For each view you create, you may want to save the view for future reference. You will often want one default view with all your data and then several other views for specific criteria. To save a view, select **Save/Edit** in the top right corner of the grid.

**Instructions**

**General Instructions:**  
Your list of available sessions and events appear below. If the 'Show Grid' checkbox is turned on, you will see a pencil icon next to the header of the grid.

**Add Hosts** - add hosts to a session by double-clicking on the host name in the grid.

**Add Abstracts** - add abstracts to a session by right-clicking on the abstract name in the grid and assign them to the selected session.

**Sessions & Events**

Training [Save/Edit] Delete

Create New Delete Selected

| Abbrev. | Cli... | Edit   | Title               |
|---------|--------|--------|---------------------|
| S104    | 140    | [edit] | Administration #2   |
| CL1     | 50     | [edit] | Clinical # 19       |
| CL3     | 110    | [edit] | Clinical #25        |
| CL2     | 90     | [edit] | Clinical #3         |
| CL4     | 80     | [edit] | Clinical 19         |
| CL5     | 10     | [edit] | Clinical 30         |
| CL^     | 30     | [edit] | Clinical Session #1 |
| CL8     | 60     | [edit] | Clinical Session 25 |
|         |        | [edit] | Clinical Trials     |

**Save Grid Configuration**

**Instructions**  
Enter a name for your view and check the 'Use as Default' box if you wish to make this your default view when landing on this page. Be sure to press save when done.

[EDIT INSTRUCTIONS]

Name: Training

Use as Default:

Added Filters:

Make available to all users of this site:

Roles:  
[All Roles]  
Session Center  
Exchange Bin-Sessioner

Save Close

In the grid configuration, give the view a descriptive name. Mark the view as Default only if you want the view to appear as the default view each time. If your view has used filters, check the Added Filters box. Finally mark the roles the view should be available to.

When you want to use the view, select it from the dropdown beside **Save/Edit**.

## SEARCH GRID DATA

The **Sessions and Events** grid contains a **Search** text box above the grid data. Entry of text in this box will cause the grid contents to be reduced to those rows that contain the search term in one or more columns. Narrow down the search by indicating the specific column(s) you want to search by. Select the appropriate option in the **Found In:** drop-down. You can click on **Clear Search** to clear all selections. When a search is added to a field, a search icon will display at the top of the column header.

**Sessions & Events**

Training 12 [Save/Edit] Delete

Search: plenary [x] Found In: All Columns [v] Clear Search

---

**Note:** The search term is applied against all columns available for the grid, both those that are displayed and those that are hidden, when All Columns is selected.

---

You may also **Filter** by column data using the column header drop-down. Click on the down-arrow beside a column header and then select **Filter** from the drop-down. Filtering options for each column will appear.

| Abbrev | Client ID | Duration | Date      | Type              |
|--------|-----------|----------|-----------|-------------------|
| S203   |           |          | Wednes... | Symposium         |
| S104   |           |          | Wednes... | Symposium         |
| S102   |           |          |           | Plenary           |
| S105   |           |          | Wednes... | Technical Session |
| S101   |           |          |           | Minisymposium     |
| S204   |           |          |           | um                |
| S205   | 0         | 120      |           | Technical Session |
| S201   | 0         | 60       |           | Workshop          |

## EDIT SESSION OR EVENT INFORMATION

There are three ways to edit the information found in the grid: new window, in-line edit., and the **Edit** link on each session and event in the grid.

### Edit in New Window

To edit type items (Session Types, Session Topics, or even the session or event data) and to access the **Information**, **Add/Edit Hosts** and **Manage Abstracts** tabs, double click on the checkmark field. The **Information** tab opens.

|                    |  |                |                  |
|--------------------|--|----------------|------------------|
| <b>Information</b> |  | Add/Edit Hosts | Manage Abstracts |
|--------------------|--|----------------|------------------|

**Instructions**  
 Enter the necessary information in the area below; all required fields are marked with a red asterisk. Please note that you will not be able to navigate to any other tab until all the required fields are complete.  
 [EDIT INSTRUCTIONS]

|                          |   |  |                            |
|--------------------------|---|--|----------------------------|
| Session Abbreviation:    | <input type="text" value="S104"/>                   | Session Creator:                               | Support, Meetings          |
| * Session Title:         | <input type="text" value="Administration #2"/>      | Session Owner(s):                              | Donovan, Grace, ScholarOne |
| Client Session ID:       | <input type="text"/>                                | <input type="button" value="Add/Edit Owners"/> |                            |
| * Session Type:          | <input type="text" value="Symposium"/>              | Session Notes:                                 | <input type="text"/>       |
| Session Topic:           | <input type="text" value="Medical Administration"/> | Notes to Admin:                                | <input type="text"/>       |
| Symposium:               | <input type="text" value="Select..."/>              | Learning:                                      | <input type="text"/>       |
| * Duration (in minutes): | <input type="text" value="90"/>                     |  |                            |

## Edit In-Line

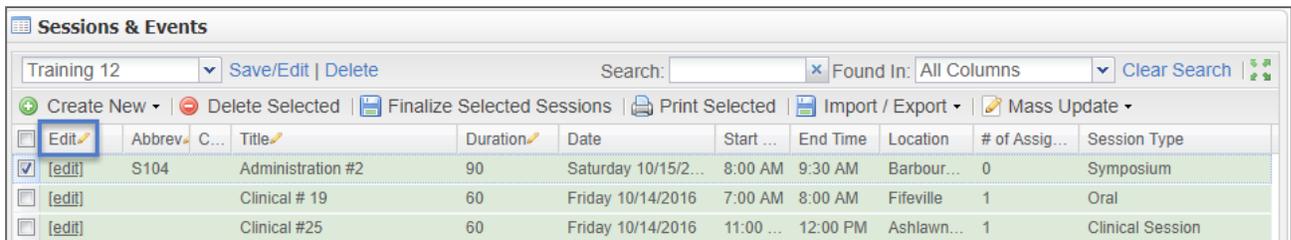
When working on the highest level of data, double-clicking an item will allow you to edit the data directly in the grid. In the example below, double-click on a **Title** to edit the title. **In-line Editing** is available for basic session data.

Columns allowing in-line editing are indicated with a pencil icon in the column header.

| Sessions & Events                         |  |   |   |  |  |                       |             |                |                  |
|---|--|---|---|--|--|-----------------------|-------------|----------------|------------------|
| Training 12                               |  | Save/Edit   Delete  |   | Search: <input type="text"/>                   |  | Found In: All Columns |             | Clear Search   |                  |
| <input type="button" value="Create New"/> | <input type="button" value="Delete Selected"/> | <input type="button" value="Finalize Selected Sessions"/> | <input type="button" value="Print Selected"/> | <input type="button" value="Import / Export"/> | <input type="button" value="Mass Update"/> |                       |             |                |                  |
| <input type="checkbox"/>                  | Edit   | Title   | Duration                                      | Date   | Start Ti...                                | End Time              | Location    | # of Assign... | Session Type     |
| <input checked="" type="checkbox"/>       | [edit]   | Administration #2   | 90  | Saturday 10/15/2016                            | 8:00 AM                                    | 9:30 AM               | Barbours... | 0              | Symposium        |
| <input type="checkbox"/>                  | [edit]   | Clinical # 19   | 60  | Friday 10/14/2016                              | 7:00 AM                                    | 8:00 AM               | Fifeville   | 1              | Oral             |
| <input type="checkbox"/>                  | [edit]   | Clinical #25  | 60  | Friday 10/14/2016                              | 11:00 AM                                   | 12:00 PM              | Ashlawn ... | 1              | Clinical Session |

## Edit Link

To quickly access the **Information**, **Add/Edit Hosts**, and **Manage Abstracts** tabs, click on the **Edit** link. By default, the **Edit** link appears in the first column, but it may be moved to other locations using the drag and drop feature.



The screenshot shows a table titled "Sessions & Events" with the following data:

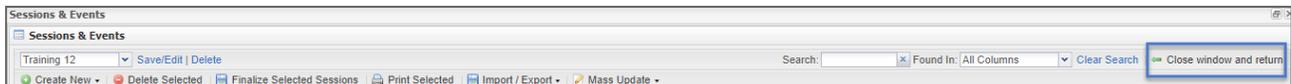
|  | Abbrev. C... | Title             | Duration | Date                | Start ... | End Time | Location   | # of Assig... | Session Type     |
|--|--------------|-------------------|----------|---------------------|-----------|----------|------------|---------------|------------------|
| <input checked="" type="checkbox"/> [edit] | S104         | Administration #2 | 90       | Saturday 10/15/2... | 8:00 AM   | 9:30 AM  | Barbour... | 0             | Symposium        |
| <input type="checkbox"/> [edit]            |              | Clinical # 19     | 60       | Friday 10/14/2016   | 7:00 AM   | 8:00 AM  | Fifeville  | 1             | Oral             |
| <input type="checkbox"/> [edit]            |              | Clinical #25      | 60       | Friday 10/14/2016   | 11:00 ... | 12:00 PM | Ashlawn... | 1             | Clinical Session |

## VIEW FULL SCREEN

To expand the Grid to a full screen view, click on the **Expand** button at the top right side of the Grid.



To return to the standard view, select **Close Window and Return**.



## DELETE/PRINT GRID DATA

In certain grids, you will see the options to delete data or to print selected data. To delete or print data, simply click the data you would like to delete or print, then click the **Delete Selected** or **Print Selected** buttons.

**Sessions & Events**

Training 12 | Save/Edit | Delete | Search: plenary | Found In: All Columns | Clear Search

Create New | Delete Selected | Finalize Selected Sessions | Print Selected | Import / Export | Mass Update

| ID   | Edit   | Title          | Date                   | Start Time | End Time | Location   | # of Assig... | Session Type |
|--|--------|----------------|------------------------|------------|----------|------------|---------------|--------------|
| <input checked="" type="checkbox"/> 263570 | [edit] | 70 Equipment   | 60 Friday 10/14/2016   | 8:00 AM    | 9:00 AM  | Blue Ri... | 1             | Plenary      |
| <input checked="" type="checkbox"/> 280389 | [edit] | Plenary #98    | 60 Friday 10/14/2016   | 1:00 PM    | 2:00 PM  | Barbour... | 1             | Plenary      |
| <input type="checkbox"/> 261832            | [edit] | Plenary 1      | 60 Friday 10/14/2016   | 11:00 AM   | 12:00 PM | Barbour... | 2             | Workshop     |
| <input type="checkbox"/> 263505            | [edit] | Plenary 2      | 60 Saturday 10/15/2... | 9:00 AM    | 10:00 AM | Albemar... | 1             | Plenary      |
| <input type="checkbox"/> 310462            | [edit] | Sample Session | 45                     |            |          |            | 0             | Plenary      |

**Note:** Select multiple rows in the grid by using control-click, shift-click, or by selecting the checkboxes one-by-one.

An example of the **Print Preview** screen that will appear after selecting **Print** is below.

**Print Sessions/Events Preview**

Session Title: Faith's Session  
 Session Type: Interactive Session  
 Session Start Time: Mon 11/18/2013 8:00 AM  
 Session End Time: Mon 11/18/2013 9:00 AM  
 Duration: 60  
 Session Location: Curie  
 Expected Attendance: 0  
 Commercial Sponsor:  
 Session Owners:  
 Session Notes:  
 Session Track:  
 Session Abbreviation:  
 Session Needs:  
 Client Session ID: 23  
 Session Prefix:  
 Notes to Admin:  
 Learning Objectives 1:  
 Learning Objectives 2:  
 Learning Objectives 3:  
 Include in IP: Yes  
 Display Individual Presentation Times: No  
 Display View Presentation Link in IP: Yes

| Order | Control ID              | Final ID | Title                           | Presentation Type | Start time<br>End time | Invitation Status |
|-------|-------------------------|----------|---------------------------------|-------------------|------------------------|-------------------|
| 1     | <a href="#">1670748</a> |          | Regulating fluids               | Oral Preferred    | 8:00 AM<br>9:00 AM     | Not Yet Invited   |
| 2     | <a href="#">1654378</a> |          | Reactions to fluid electrolysis | Oral Preferred    | 8:00 AM<br>9:00 AM     | Not Yet Invited   |

0 Jam Test 5 157524 Session 29 Thurs... 3  
 0 Poster Session 2 114475 Session P-02 25 Monday 48

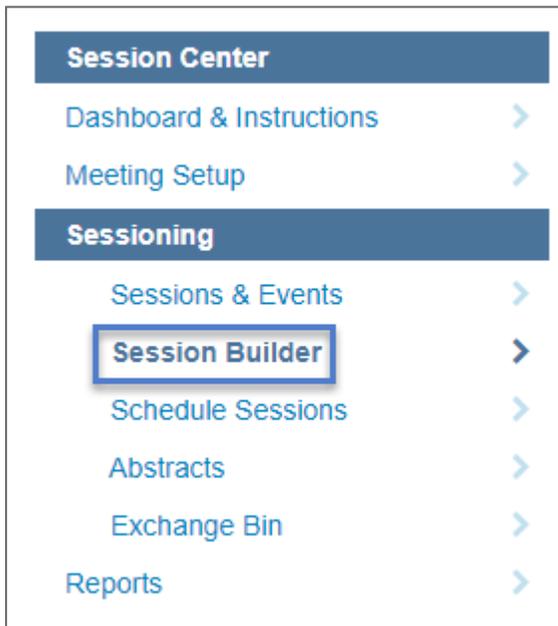
Print Print All Cancel

The Session Proof displayed above is a configurable item. Navigate to **Admin>Client Configuration>Session Proof Configuration** to modify the contents of the proof.

## SESSION BUILDER

As an added feature, the **Session Builder** can be used to create sessions, add abstracts to sessions, and add hosts. There are two views to work with: **Assign Abstracts** and **Assign Hosts**.

To access the **Session Builder**, select **Sessioning** on the left menu and then **Session Builder**. The default view is **Assign Abstracts**.



### ASSIGN ABSTRACTS TOGGLE VIEW

The **Assign Abstracts Toggle View** has three sections: Sessions on the left, Submitted Abstracts on the top right and Currently Assigned Abstracts on the bottom right.

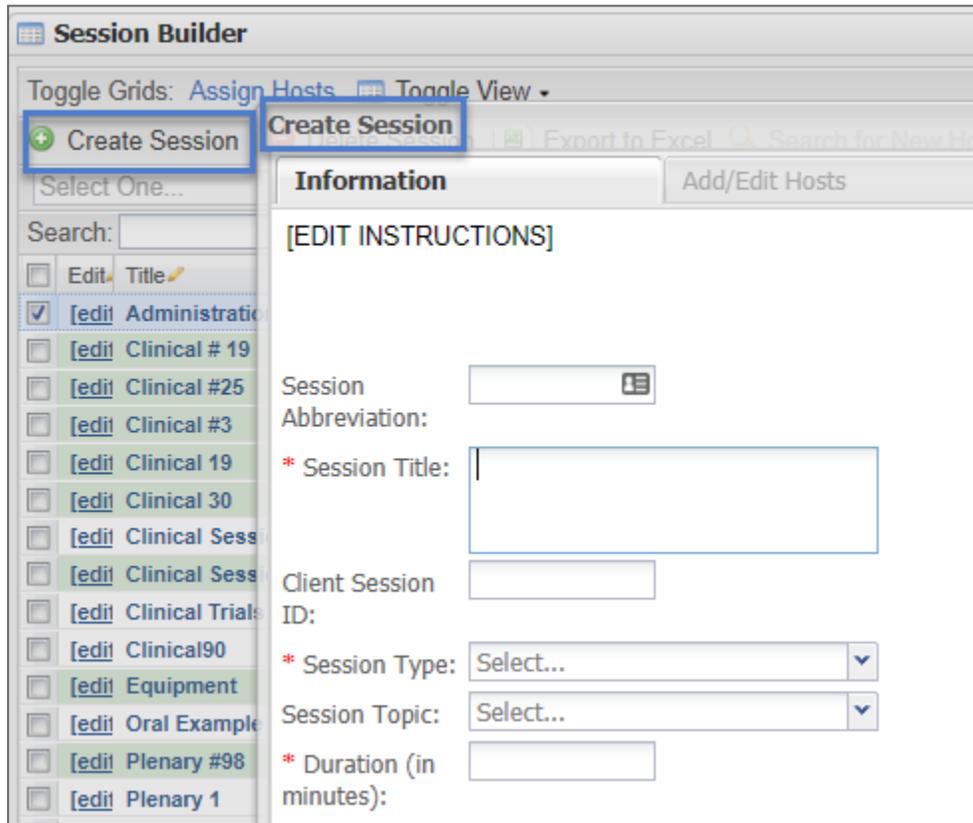
The screenshot displays the 'Session Builder' interface. On the left, a list of sessions is shown, with 'Administration #2' selected. The right pane shows the details for 'Administration #2', including a table of 'Currently Assigned Abstracts'.

| Control ID | Edit Abstr... | Title         | Final ID | Presenting Author | Abstract Sta... | Re-Categorize |
|------------|---------------|---------------|----------|-------------------|-----------------|---------------|
| 2287073    | Edit          | Abstract #15  |          | Chambers, Patrick | Decided         | Re-Categorize |
| 2287074    | Edit          | Abstract #16  |          | Chambers, Patrick | Decided         | Re-Categorize |
| 2287076    | Edit          | Abstract #18  |          | Chambers, Patrick | Decided         | Re-Categorize |
| 2287077    | Edit          | Abstract #19! |          | Chambers, Patrick | Decided         | Re-Categorize |
| 2287119    | Edit          | Abstract #24  |          | Donovan, Grace    | Decided         | Re-Categorize |
| 2287127    | Edit          | Abstract #28  |          | Donovan, Grace    | Decided         | Re-Categorize |
| 2287130    | Edit          | Abstract #29  |          | Donovan, Grace    | Submitted       | Re-Categorize |
| 2287135    | Edit          | Abstract #31  |          | Thompson, David   | Decided         | Re-Categorize |

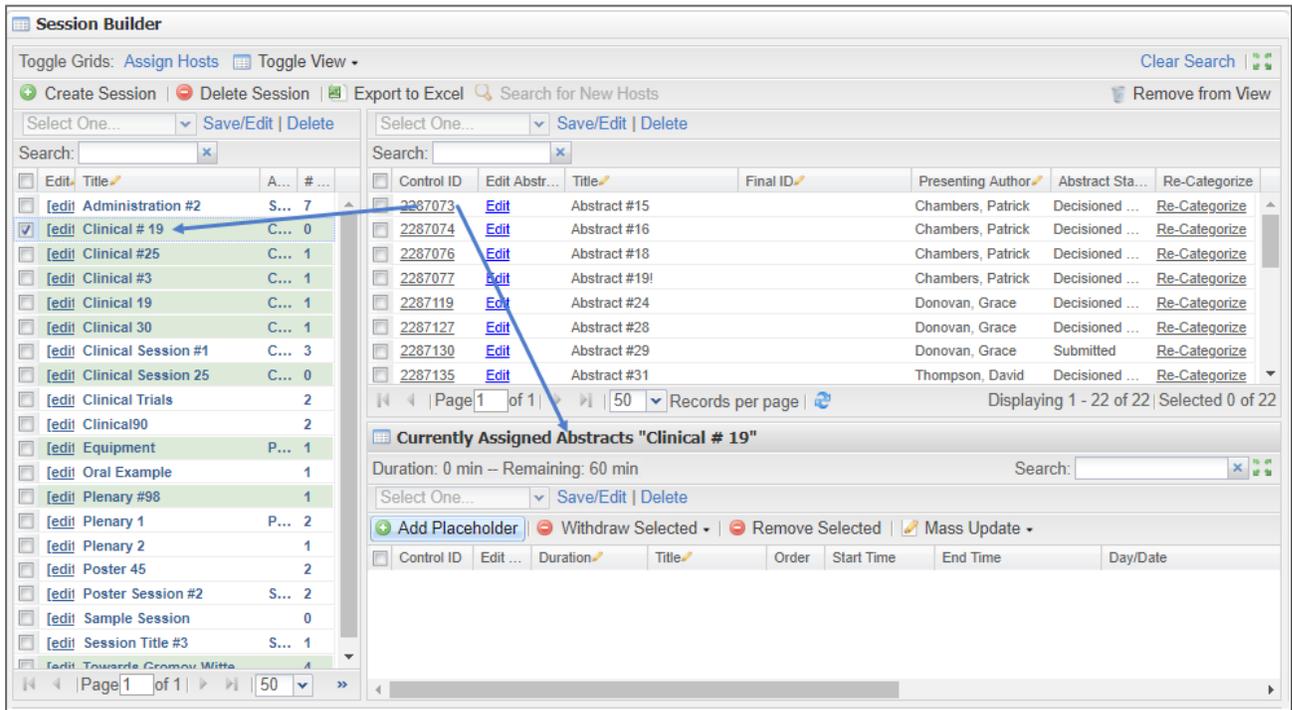
| Control ID | Edit ... | Duration | Title       | Order | Start Time | End Time | Day/Date            |
|------------|----------|----------|-------------|-------|------------|----------|---------------------|
| 2082947    | Edit     | 18       | Abstract #1 | 1     | 8:00 AM    | 8:18 AM  | Saturday 10/15/2016 |
| 2280347    | Edit     | 18       | Abstract #3 | 2     | 8:18 AM    | 8:36 AM  | Saturday 10/15/2016 |
| 2280391    | Edit     | 18       | Abstract #5 | 3     | 8:36 AM    | 8:54 AM  | Saturday 10/15/2016 |
| 2280392    | Edit     | 18       | Abstract #6 | 4     | 8:54 AM    | 9:12 AM  | Saturday 10/15/2016 |

To begin building your session, click **Create Session** at the top left of the Grid. Enter the required data and click **Save**. Your session will appear in the session listing on the left.

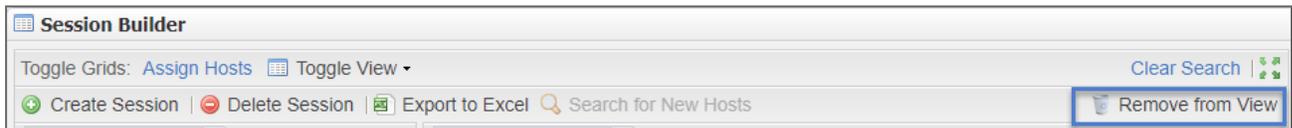


The screenshot displays the 'Session Builder' application window. At the top, there are navigation options: 'Toggle Grids: Assign Hosts', 'Toggle View', and a 'Create Session' button highlighted with a blue box. Below this is a search bar and a list of session categories, including 'Administrative', 'Clinical #19', 'Clinical #25', 'Clinical #3', 'Clinical 19', 'Clinical 30', 'Clinical Session', 'Clinical Session', 'Clinical Trials', 'Clinical90', 'Equipment', 'Oral Example', 'Plenary #98', and 'Plenary 1'. The 'Create Session' dialog box is open, showing the 'Information' tab. It contains the following fields: 'Session Abbreviation' (text input), '\* Session Title' (text input), 'Client Session ID' (text input), '\* Session Type' (dropdown menu), 'Session Topic' (dropdown menu), and '\* Duration (in minutes)' (text input). The dialog also includes an 'Add/Edit Hosts' button and a '[EDIT INSTRUCTIONS]' link.

The next step is to add abstracts to the Session. Check the session title for the session with which you wish to work. From the Abstracts portion of the grid, drag and drop the desired abstracts to the **Currently Assigned Abstracts** section on the bottom right. Alternatively, drag and drop the abstract to the session title on the left.

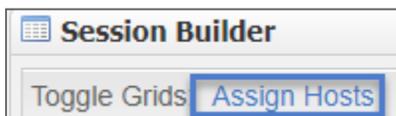


To hide abstracts in the Abstracts section of the Grid, check the abstracts you wish to hide and select **Remove from View** in the top right corner. To make all abstracts visible again, click **Return to All Abstracts**.

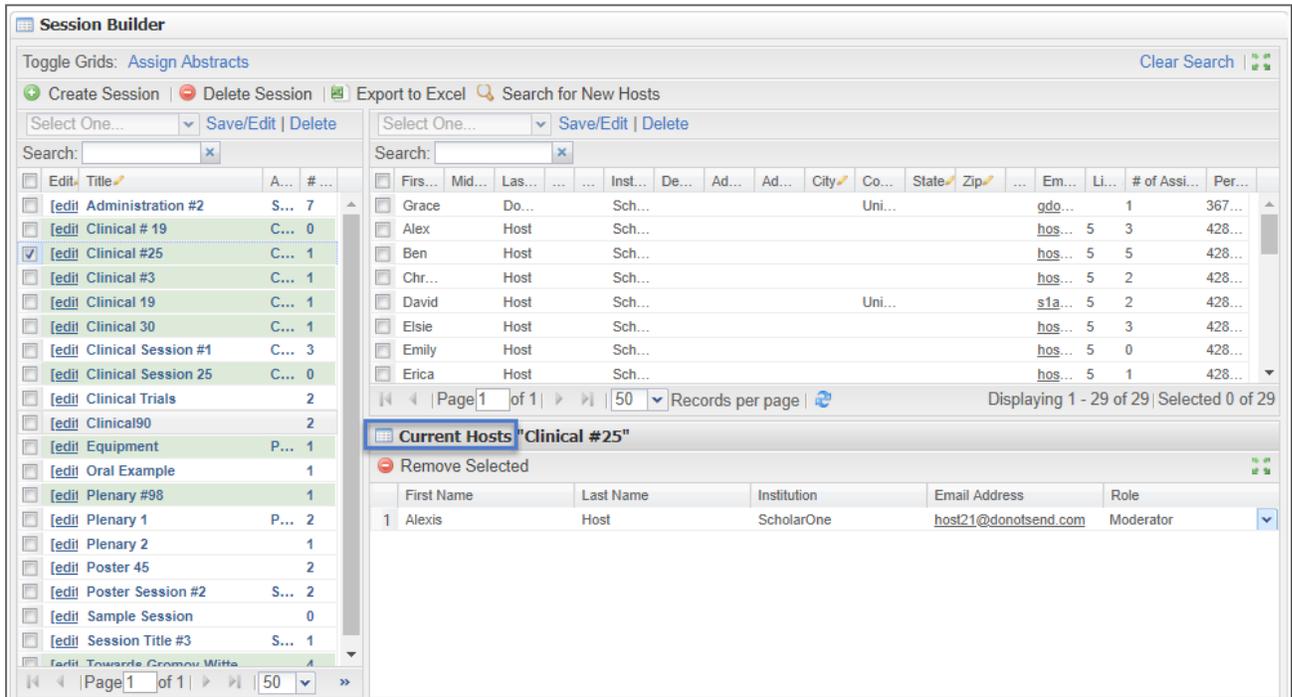


### ASSIGN HOSTS TOGGLE VIEW

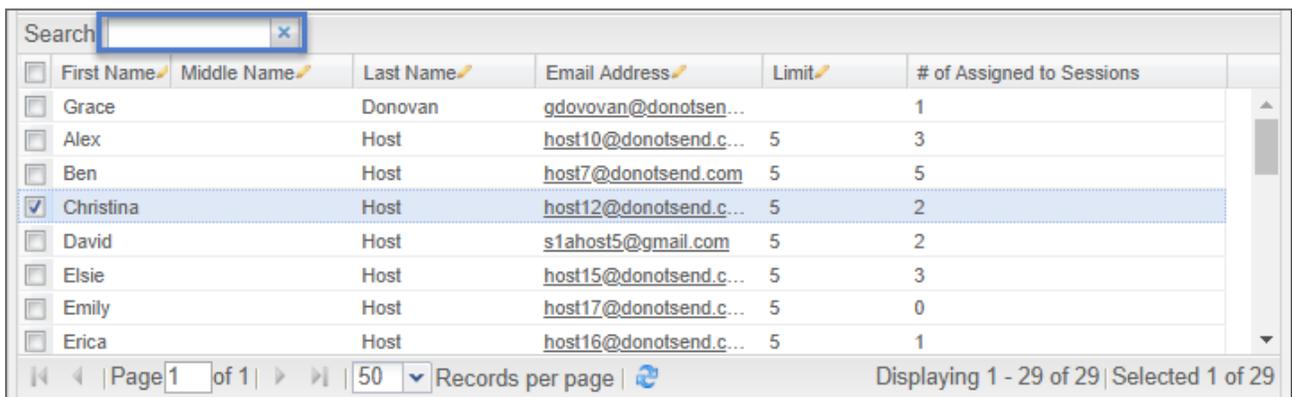
After abstracts have been assigned to the Session, the next step is to add hosts. Select **Toggle Grids: Assign Hosts**.



The grid has three main sections: Sessions on the left, Available Hosts on the top right, and Current Hosts on the bottom right.



To search for a host to add to the session, use the **Search** box to enter host information.



Once you locate the correct host, drag and drop the host to the **Current Hosts** section in the bottom right.

Search:

| <input checked="" type="checkbox"/> | First Name | Middle Name | Last Name | Email Address         | Limit | # of Assigned to Sessions |
|-------------------------------------|------------|-------------|-----------|-----------------------|-------|---------------------------|
| <input checked="" type="checkbox"/> | Grace      |             | Donovan   | gdovovan@donotsend... |       | 1                         |

Page 1 of 1 | 50 Records per page | Displaying 1 - 1 of 1 | Selected 1 of 1

**Current Hosts "Clinical #25"**

Remove Selected

|   | First Name | Last Name | Institution | Email Address        | Role      |
|---|------------|-----------|-------------|----------------------|-----------|
| 1 | Alexis     | Host      | ScholarOne  | host21@donotsend.com | Moderator |

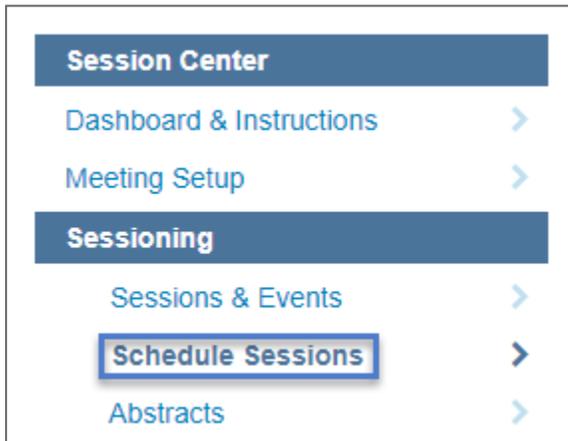
After you have added the abstracts and hosts, return to the **Session & Events** grid to view the complete session.

## SCHEDULING SESSIONS & EVENTS

The Session Center features session scheduling tools designed to help you create your complete meeting program. There are two ways to schedule: The **Grid Scheduler** and the **Session Information** tab.

### GRID SCHEDULER

The most popular way to schedule sessions and events is with the **Grid Scheduler**. To begin, select **Schedule Sessions** on the left-hand navigation pane.

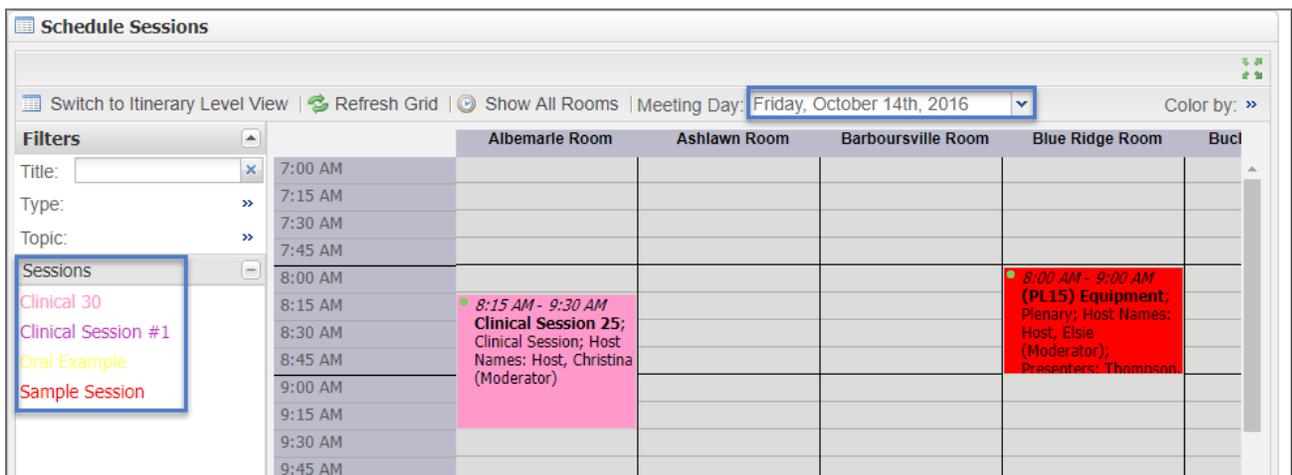


Select the **Meeting Day** from the top drop-down menu and then drag **Sessions** to and from the pre-loaded sessions list into any of the available rooms. This tool allows users to drag sessions from room to room or time to time without needing to un-schedule them.

---

**Note:** A duration, room, or time of day may be changed without the date of the session updating.

---



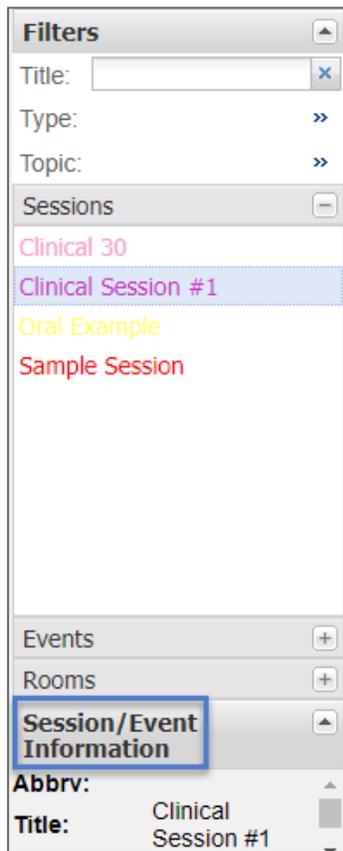
Follow the same process for Events using the Event listing.

When viewing the schedule grid and red lines appear, this indicates the room is not available for scheduling during the selected days and times.

|         | Americas Seminar | Room 4a |
|---------|------------------|---------|
| 7:00 AM |                  |         |
| 7:15 AM |                  |         |
| 7:30 AM |                  |         |
| 7:45 AM |                  |         |
| 8:00 AM |                  |         |
| 8:15 AM |                  |         |
| 8:30 AM |                  |         |
| 8:45 AM |                  |         |

If you chose colors for your session types (**Meeting Setup >Types or Topics**), the sessions will display in the grid with the appropriate colors. This makes it easier to see the layout of your different types of sessions and events.

In addition, a Sessioner may filter down the list of available sessions by typing text into the **Filter** area and pressing **Enter**. Clicking on a session will reveal details about that session or event in the **Session/Event Information** field.



**Filters**

Title:  ✕

Type: »

Topic: »

Sessions ▾

Clinical 30

Clinical Session #1

Oral Example

Sample Session

Events +

Rooms +

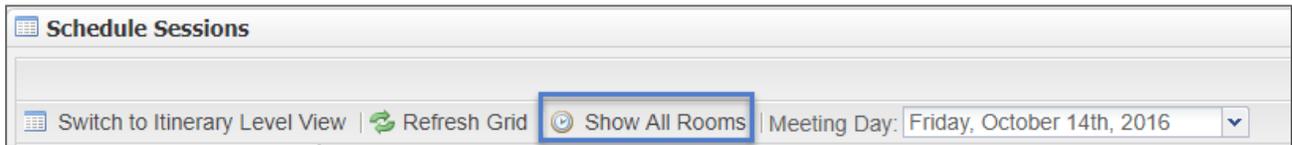
Session/Event Information ▾

Abbrev: Clinical Session #1

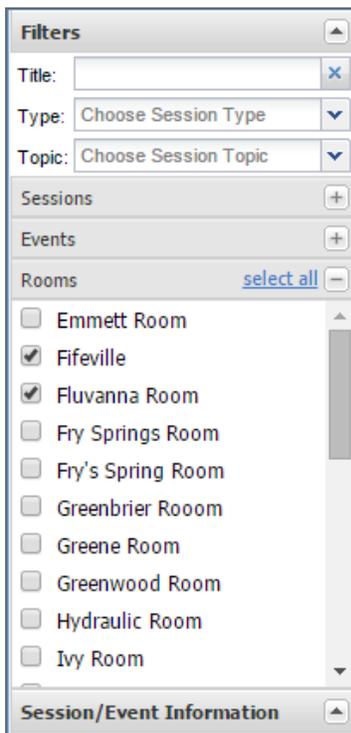
**Tip:** Assignments that run over the available time, conflict with previously assigned sessions, or result in Presenter conflicts will generate an error message, and the assignment will not be made. Assignment of concurrent sessions to a Room is allowed if the **Multiple Sessions** option is checked in the **Add/Edit Room** page.

## Room Views

By default, the first ten rooms will be displayed (alphabetical sort). To show all rooms in the **Scheduling Grid**, click on **Show All Rooms**. You will then be able to scroll to all the rooms entered in **Meeting Setup > Programs > Rooms**.



You may also change the number of rooms displayed by dragging and dropping the rooms to the room listing in the left portion of the grid.



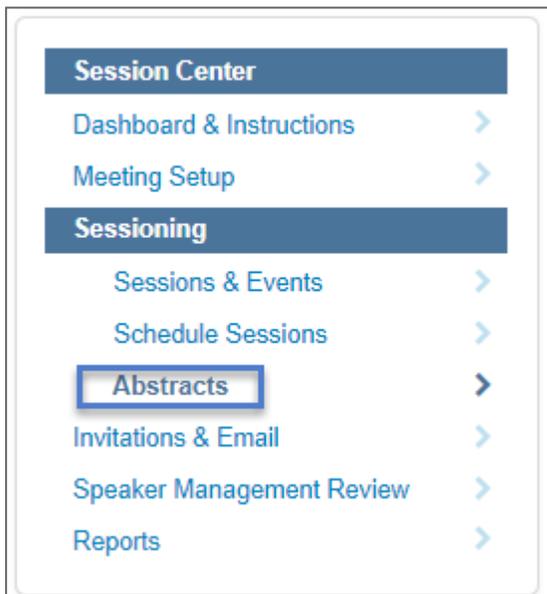
## THE SESSION INFORMATION TAB

Access the **Information** tab by double-clicking on the desired session or by clicking the **Edit** option in the session row. In the bottom right corner are the three scheduling fields. Enter your desired schedule and click **Save**. This is a configurable option that your Client Implementation Manager can configure for your site.

|               |   |   |
|---------------|---|---|
| Venue/Room:   | Albemarle Room (Annual Meeting Program) | ▼ |
| Session Date: | Wed, Oct 14, 2015                       | 📅 |
| Start Time:   | 8:00 AM                                 | ▼ |

## ABSTRACTS GRID

To view a complete listing of all submitted abstracts, select **Abstracts** from the left menu. This view can be useful in researching abstracts for inclusion in sessions.



The **Abstracts** grid can be customized in the same way as the **Session & Events** grid. Columns are sortable and configurable. There is also a **Search** option.

The screenshot shows the 'Abstracts' grid interface. At the top, there is a search bar with a 'Search' button and a 'Clear Search' button. Below the search bar are buttons for 'Export to Excel' and 'Toggle View'. The main table has columns for Control ID, Edit Abstract, Title, Presentation Type, Category, Decision Status, and Abstract Status. The table contains several rows of abstract data.

| Control ID | Edit Abstract        | Title         | Presentation Type | Category         | Decision Status   | Abstract Status    |
|------------|----------------------|---------------|-------------------|------------------|-------------------|--------------------|
| 2287047    | <a href="#">Edit</a> | Abstract #11  | Oral Preferred    | Basic Science    | Accept for Podium | Decisioned Acce... |
| 2287061    | <a href="#">Edit</a> | Abstract #12  | Video             | Clinical Science | Accept for Poster | Decisioned Acce... |
| 2287067    | <a href="#">Edit</a> | Abstract #13  | Poster Preferred  | Clinical Science | Accept for Podium | Decisioned Acce... |
| 2287074    | <a href="#">Edit</a> | Abstract #16  | Video             | Basic Science    | Accept for Poster | Decisioned Acce... |
| 2287077    | <a href="#">Edit</a> | Abstract #19! | Poster Preferred  | Basic Science    | Accept for Podium | Decisioned Acce... |
| 2287119    | <a href="#">Edit</a> | Abstract #24  | Video             | Basic Science    | Accept for Podium | Decisioned Acce... |
| 2287124    | <a href="#">Edit</a> | Abstract #27  | Poster Preferred  | Basic Science    | Accept for Podium | Decisioned Acce... |
| 2287127    | <a href="#">Edit</a> | Abstract #28  | Video             | Clinical Science | Accept for Podium | Decisioned Acce... |

You can edit an abstract from this grid. Click on the blue **Edit** link (shown above) to access an abstract. You can then edit the abstract, close it, and return to the Abstracts grid.

---

**Note:** If changes are made to an abstract (for example, a presenting author is changed) and the abstract has been sessioned, no updates will occur to the Speaker Management grid. The session will need to be unfinalized and then refinalized for the updates to appear in the Speaker Management grid.

---

If you have the Final ID column configured, you can edit a Final ID directly from the grid. Use in-line editing to access the field and then edit the ID.

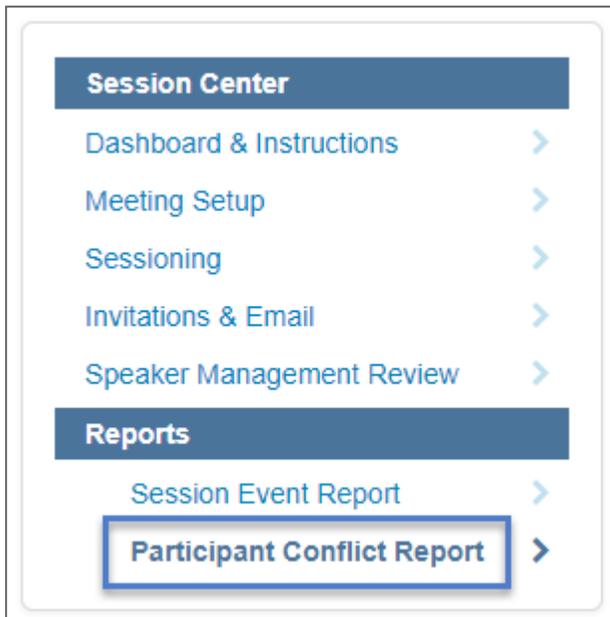
The screenshot shows a portion of the Abstracts grid with the 'Final ID' column visible. The row for 'Abstract #4' is selected, and the 'Final ID' field is in an in-line editing state, showing the value '201610'.

| Control ID | Edit Abstract        | Title       | Final ID |
|------------|----------------------|-------------|----------|
| 2082947    | <a href="#">Edit</a> | Abstract #1 | 1        |
| 2280347    | <a href="#">Edit</a> | Abstract #3 | 6        |
| 2280387    | <a href="#">Edit</a> | Abstract #4 | 201610   |

## REPORTS

### PARTICIPANT CONFLICT REPORT

The **Participant Conflict Report** lists time conflicts for presenters and hosts. This allows administrators to move presentation times to remove the participant conflicts. To access the report, select **Reports** from the left-hand navigation pane and then select **Participant Conflict Report**.



---

**Note:** The report includes Final IDs and Control IDs for easy conflict resolution.

---

Select your session and topic (if configured) types. You will also indicate the buffer time. The buffer time is the minimum amount of time between sessions that the report will cover. Finally you will select to run the report on presenters only or both presenters and hosts.

Session Type:   
 Poster   
 Poster 1   
 Poster 2   
 Scientific Session

Session Topic:   
 Clinical Trials   
 Genetics of Cancer   
 Immunotherapy   
 Medical Administration

Buffer (min): 15

Role: Presenters and Session Host  Include results where a presenter is also a host.

The report will display the conflicts in the schedule. In addition to the report results, when a session is scheduled and produces a presenter or host conflict an error message will appear.

### SESSION EVENT REPORT

The **Session Event Report** can be found under **Reports** in the left navigation pane. This report lists all Events in the program along with the designated host, if applicable.

| Event Title   | Date       | Start Time  | End Time    | Room                           | Abbr. | Type            | Topic | Sponsor |
|---|------------|-------------|-------------|--------------------------------|-------|-----------------|-------|---------|
| Test Event  | 10/14/2015 | 09:00:00 AM | 09:30:00 AM | Ashlawn Room (Thomson Reuters) |       | Meet the Expert |       |         |
| Event Chair: Joseph JH Ackerman    ackerman@wustl.edu |            |             |             |                                |       |                 |       |         |

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